

# QRG PAY.9- Pay Initials at Time of Sale

## How to Pay Initials

1. After the quote is accepted, click on "Pay Initials/PIA."
2. In the popup window, select the service center for the related charges.
3. Then select the payment type from the dropdown.
4. A new popup will appear letting you know the customer payment record has been created.
5. A link is sent to the account email for the customer to enter their credit card or checking account information.

CPQ Console | Leads | Sean McSeanie- | O... | Sean McSeanie-... | Q-07673... | Quote Q-07673 | Pay Initials / PIA | Clone with Related | Printable View

Sales Rep	Type	Status	Account Type	Expires On	Net Amount
Sean Clifford	New	Accepted	Residential	3/30/2025	\$212.50

Accepted | Declined

Details | Quote History | Approvals (Quote) (0)

Pay Initials / PIA

Quote Line Groups needing Payments (1) | Quote Line Groups with Payment Objects (0)

<input type="checkbox"/> Service Center	Total
<input type="checkbox"/> GreenUP Ormond Beach	\$212.50

Amount to pay \$0.00

\* Payment Type: --None--

Next

Pay Initials / PIA

4 Payment record Created - please go to the record using [THIS LINK](#).  
a4YO500001JHYXMA0

Finish and go back to Quote

Payment Details | Amount: 92.00

Billing Information

5 Card Number \* | CVV2 | EXP \*  
Credit/Debit Card Number | 999 | MMYY

First Name \* | Last Name \*  
First Name | Last Name

Billing Address \*  
1234 Your Billing Street

City \* | State \* | Zip \*  
Your City | -- Select State -- |

Email  
you@example.org (?)

I'm not a robot | reCAPTCHA | Privacy - Terms

process payment