

eBiz Integration - Credit Card Payments on 1place - How to's

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Overview

EBizCharge is a fully integrated payment processing solution within 1place that allows businesses to securely **accept, manage, and track credit card payments** throughout the sales process.

Once the EBizCharge integration is set up, payment-related activities can be managed directly within 1place, helping keep customer payment information and transaction activity connected to the corresponding customer and sales records.

With EBizCharge, users can:

- **Manage Customer Payment Methods** - Add and manage customer payment methods within 1place.
- **Process Credit Card Payments** - Accept credit card payments directly from **Sales Orders** and **Invoices**.
- **Generate Payment Links** - Create **Email Pay / Payment Links** that can be sent to customers so they can make a payment online.
- **Track Transactions** - View credit card transaction history and payment activity within 1place.
- **Accept Customer Portal Payments** - Allow customers to securely make credit card payments through the **Customer Portal**.
- **Request Payment Methods** - Send requests to customers to provide or save a payment method.
- **Process Refunds** - Process refunds for applicable credit card transactions.

The EBizCharge integration connects these payment activities with the customer's records and sales transactions in 1place, providing a centralized way to manage credit card payments without requiring users to leave the system for everyday payment tasks.

This article covers the complete EBizCharge workflow in 1place, including:

- Setting up an **EBizCharge account**.
- Connecting the EBizCharge account to **1place**.
- Managing customer payment methods.
- Processing credit card payments.
- Sending payment links and accepting Customer Portal payments.
- Viewing transaction history.
- Requesting payment methods.
- Processing refunds.

When creating or updating a user, review the applicable security settings to make sure the user's access matches their responsibilities.

Help Topics

Getting Started

- How to Sign Up for an EBizCharge Account
- How to Set Up the EBizCharge Integration in 1place
- How to Verify the EBizCharge Integration

- Understanding EBizCharge in 1place

Managing Customer Payment Methods

- How to Add a Customer Payment Method
- How to Edit or Remove a Saved Payment Method
- How to Request a Customer Payment Method
- Understanding Saved Payment Methods

Processing Credit Card Payments

- How to Process a Credit Card Payment from an Invoice
- How to Process a Credit Card Payment from a Sales Order
- How to Process a Payment Using a Saved Card
- How to Process a One-Time Credit Card Payment
- Understanding Payment Results

Customer Payment Experience

- How to Generate an Email Pay / Payment Link
- How Customers Pay Through the Customer Portal
- How to Send a Payment Request to a Customer
- Understanding the Customer's Payment Experience

Managing Transactions

- How to View Credit Card Transaction History
- How to Review a Credit Card Transaction
- How to Refund a Credit Card Payment
- Understanding Credit Card Transaction Statuses

Troubleshooting & Reference

- How to Troubleshoot a Failed Credit Card Payment
- How to Troubleshoot an EBizCharge Integration Connection
- Common EBizCharge Payment Errors
- Frequently Asked Questions

Getting Started

How to Sign Up for an EBizCharge Account

Before using EBizCharge to process credit card payments through 1place, your business must first establish an EBizCharge account.

If you are interested in using EBizCharge with 1place, you can sign up with assistance from your dedicated 1place Customer Support team.

To get started:

1. **Contact your dedicated 1place Customer Support team** and let them know that you would like to sign up for

an EBizCharge account.

2. **1place will introduce you to EBizCharge** and initiate the referral process.
3. **Wait for EBizCharge to contact you.** An EBizCharge Sales Representative will reach out to you to discuss the account setup and offer an EBizCharge demo.
4. **Prepare your credit card processing statements.** EBizCharge may request your most recent **three months of credit card statements** as part of the account setup process. Have these statements available when requested.
5. **Complete the EBizCharge signup and onboarding process** with the EBizCharge team.
6. Once your EBizCharge account is established, you can proceed with **setting up the EBizCharge integration in 1place.**

Note: EBizCharge handles the payment-processing account setup and approval. The specific information or documentation required during the signup process may vary.

Need help getting started? Contact your dedicated 1place Customer Support team to request assistance with signing up for EBizCharge.

How to Set Up the EBizCharge Integration in 1place
