SOP*: Setting Up Click2Pay

Aim

To activate the Click2Pay component, which allows customers to make a payment directly from the invoice, with a click of a button or by scanning a QR code. Credit card payments are made quickly and easily through a secure connection to a clearing company.

Setups

- Credit clearance has been defined in ***Priority*** (for detailed instructions see our standard operating procedure for Clearing Credit Card Payments).
- A Credit Clearance module.
- A Priority Gateway module
- A Click2Pay module.
- An application license for Click2Pay has been purchased and the Renew License program has been run.

Procedure

Step 1: Setting Up a User to Work with Click2Pay

Activities recorded in Click2Pay will be registered under a particular user. When you send an invoice that contains the Click2Pay button, it will be sent from this user's email account with their username. Therefore, it is recommended to use an email and username that properly represents your company such as, the company name.

Assign the following privileges for this user:

1. In the Applications for License form, assign a license for the Click2Pay app (for detailed instructions see our standard operating procedure for Application Licenses).
2. In the Users form, assign privileges for the relevant companies to this user in the **Privilege Groups by Company** sub-level form.

Step 2: Installing an Application Server and Priority Gateway

- Install the application server and the Priority Gateway component (for detailed instructions see our standard operating procedure for Installing the Application Server). Then, log on to the application server as a user from the administrators group (e.g., Administrator).

Step 3: Activating Click2Pay

- In the Financ. Parameters for Customers form, flag the **Add Inv Payment Link** column for the relevant customers. The Click2Pay payment link will only appear on invoices for customers that have this column flagged.

* Customers are strongly advised not to use the current procedures without prior testing to make sure that they fit their own requirements and work practices.

Step 4: Settings for Printing / Viewing the Invoice

I Defining the Company Logo that will Appear on the Payment Form

- In the Company Data form, or the Subsidiaries form (if a subsidiary exists), define the company logo in the relevant **Logo** columns.

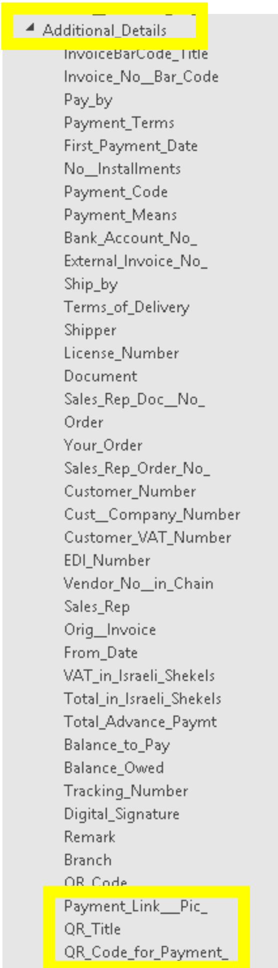
Note: The logo will appear when the customer pays with Click2Pay. The size of the logo should be 30X150. If the logo is set to a different size, the system will try to match the logo to the desired size.

II Adding Click2Pay to Printed/Emailed Invoices

- Click2Pay's Button/QR code enables customers to pay directly from the invoice.
- When you send/print the invoice as a system document, (i.e., the invoice is produced using the system default, as an HTML file), the button/QR code, will be included automatically within the invoice.
- When you send/print the invoice as a template document (i.e., "template document" was selected in the printing settings for the invoice. The invoice will be generated according to the defined Word template), add the relevant tag (from the "Additional_Details" tab, see picture) to the template of the invoice:

    - For invoices sent via email: **Payment_Link___Pic_**
    - For printed invoices: **QR_Title** (which contains an explanation for scanning the code) and **QR_Code_for_Payment** (which contains the QR picture).

  For more information regarding customizing Word templates, see our **User Interface Guide**.



XML Tags for adding a button / QR code to invoice

Notes:

- Do this separately for each invoice type (sales invoice, vendor invoice etc.) that is generated with a Word template, in which you want to add theClick2Pay component.
- When you send an invoice by email or choose the display option, the link for payment via Click2Pay will appear as a button. The graphic of the button is saved in: system/images/Click2Pay_button_en.png. You can create a custom image and replace the image in the system as desired, however, we recommend saving the original photo in case you decide to revert back to the default button.
- When you print an invoice, the Click2Pay payment link will appear on your invoice as a QR. code

Step 5: Additional Recommended Settings

- A receipt will not be sent automatically when a payment is made throughClick2Pay. To define the next step in the system after payment through Click2Pay occurs, set a business rule in the Receipts form that will be activated when the **Pay withClick2Pay** column is flagged. For more information about defining business rules, see our **User Interface Guide**.
- The payment terms for customers when they pay through Click2Pay are based on the payment terms defined in the Customers form. Therefore, if you wish to allow the customer to pay with different terms (for example, to allow payment in installments to a customer defined for paying in a single payment), the settings must be changed in this form.