# paya CLICK2PAY Setup or Configuration User Guide

**CLICK2PAY SETUP/CONFIGURATION**
**QuickBooks Online**
**User Guide**

**Contents**

## Installation of Solution within Click2Pay

- Log into your Click2Pay account at **https://c2pweb.shawnburt.com/**
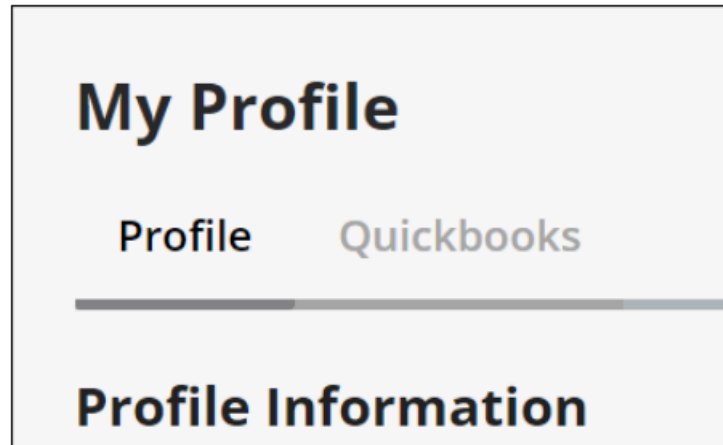- Click on the person icon at the top right-hand corner of the screen.
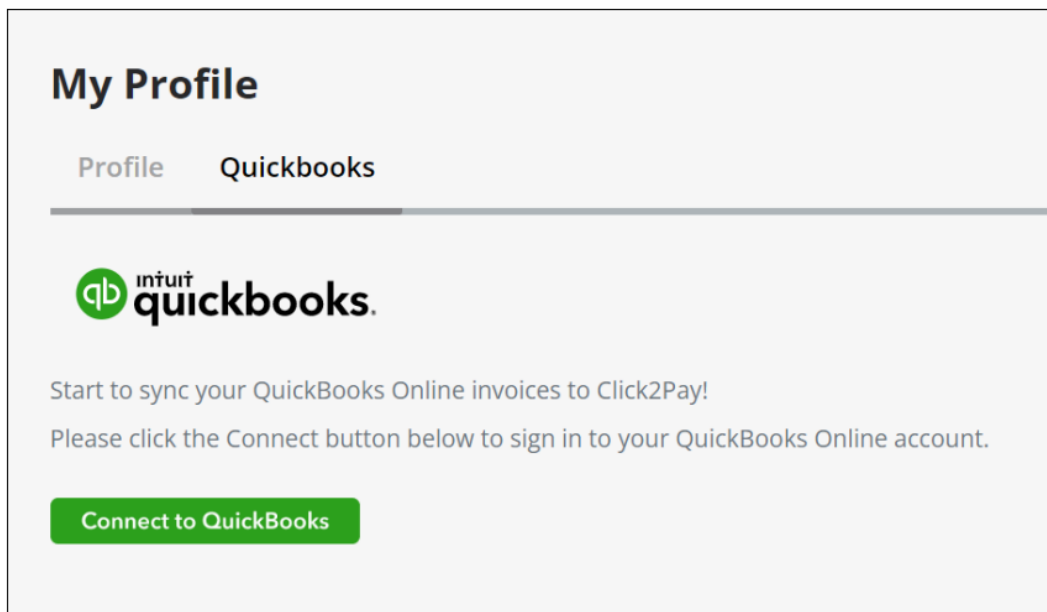


- Select My Profile from the dropdown menu.
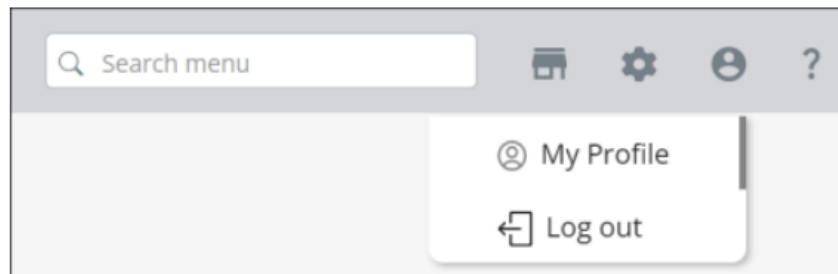
- Toggle from Profile to QuickBooks.



- Click on the Connect to QuickBooks button.



- You will be redirected to Intuit Accounts – Sign In to sign into your QuickBooks Online account. Enter your credentials and click Sign In.

- You will then be redirected to the Intuit App Center to read the terms regarding connecting Click2Pay by Paya to your QuickBooks Online account. Once you have read and agree to the terms, click on the Connect button to begin the connection of Click2Pay to your QuickBooks Online account.
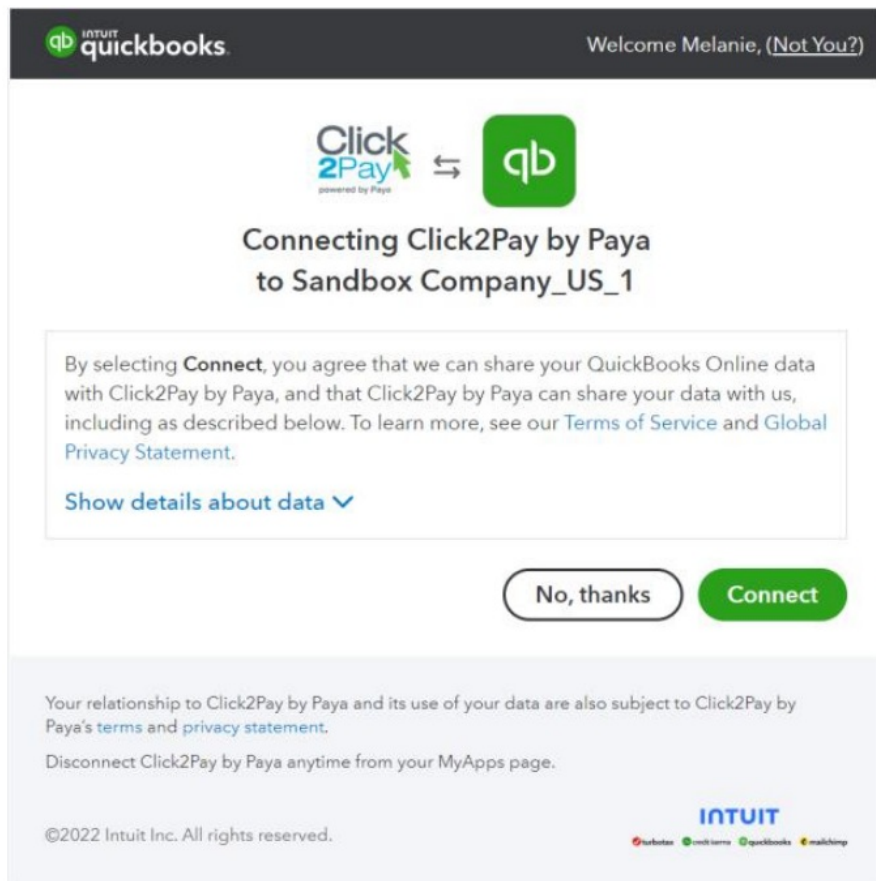
- Once connected, the following screen should appear.

  **Please note:** It now states "Disconnect from QuickBooks Online" instead of "Connect to QuickBooks". This indicates the connection was successful.
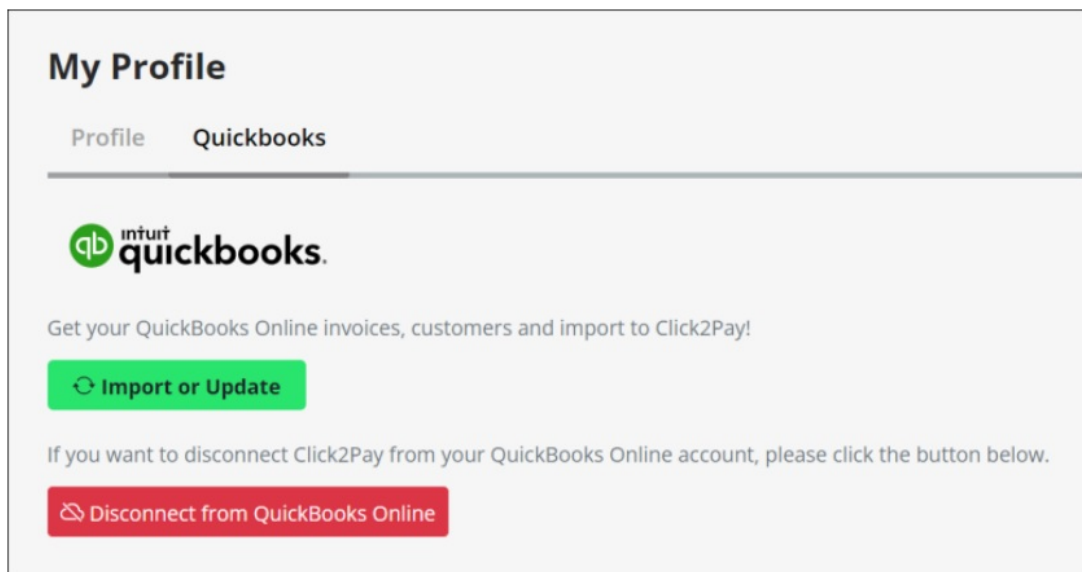


- The installation of the solution has been completed.
  - ➢ Next step – Invoice and Customer Import

**Invoice and Customer Import within Click2Pay**

- To begin the import process, click on the Import or Update button.

- Your company's invoices and customers will appear in the pop-up window.



Select invoices you want to import or update!

| | Doc Number | Customer | Total Amount | Balance | Txn Date | |
|---|---|---|---|---|---|---|
| | 1001 | Amy's Bird Sanctuary | $108.00 | $0.00 | 6/30/2022 | ... |
| | 1002 | Bill's Windsurf Shop | $175.00 | $0.00 | 3/18/2022 | ... |
| | 1004 | Cool Cars | $2,369.52 | $0.00 | 6/21/2022 | ... |
| | 1005 | 55 Twin Lane | $54.00 | $4.00 | 6/24/2022 | ... |
| | 1006 | 55 Twin Lane | $86.40 | $0.00 | 5/25/2022 | ... |
| | 1007 | John Melton | $750.00 | $450.00 | 6/8/2022 | ... |
| | 1009 | Travis Waldron | $103.55 | $0.00 | 6/30/2022 | ... |
| | 1010 | Weiskopf Consulting | $450.00 | $450.00 | 7/1/2022 | ... |
| | 1012 | Barnett Design | $274.50 | $274.50 | 6/19/2022 | ... |
| | 1013 | Travis Waldron | $81.00 | $0.00 | 6/21/2022 | ... |
| | 1015 | Paulsen Medical Supplies | $954.75 | $954.75 | 7/1/2022 | ... |
| | 1016 | Kookies by Kathy | $75.00 | $75.00 | 5/15/2022 | ... |
| | 1017 | Sushi by Katsuyuki | $80.00 | $0.00 | 6/17/2022 | ... |
| | 1018 | Sushi by Katsuyuki | $80.00 | $80.00 | 6/24/2022 | ... |

Close    Import

- Select the invoices/customers you would like to import by clicking on the blank boxes on the left-hand side of the screen or to select all, click on the top box on the header line. Then, click on the Import button. (This will import your current invoices/customers from QuickBooks Online to your Click2Pay account.)
- A pop-up message will appear at the top of the screen as shown below while the import process is taking place.
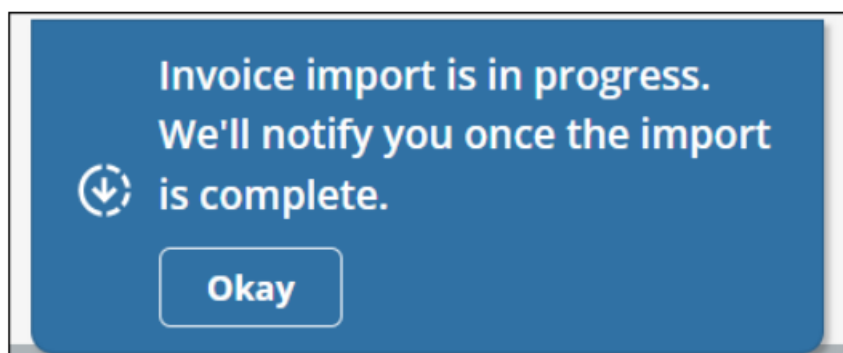


- Once the import has been completed, the following message will appear. This indicates the import process was successful. You can close the window or view the file to confirm all invoices selected were imported.
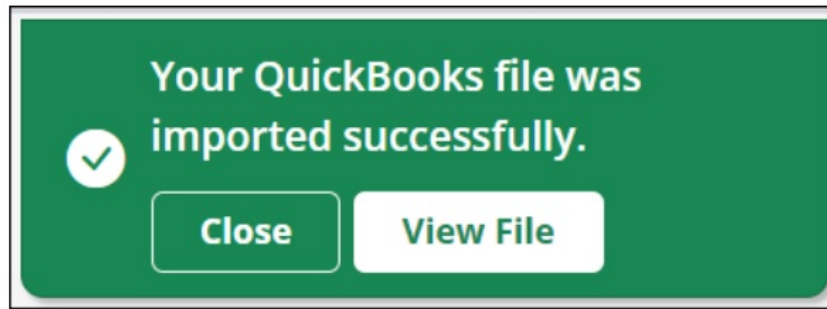
- If you click on View File, you will be redirected to My Activity which is located on the left menu bar to confirm all selected invoices/customers have been successfully imported into your Click2Pay account.
- The invoice and customer import has been completed.
  - ➢ Next step – Installation Confirmation

## Installation Confirmation within QuickBooks

- Log into your QuickBooks account at Intuit Accounts – Sign In
- Once you are on the Home screen, access the menu bar on the left-hand side of the screen.
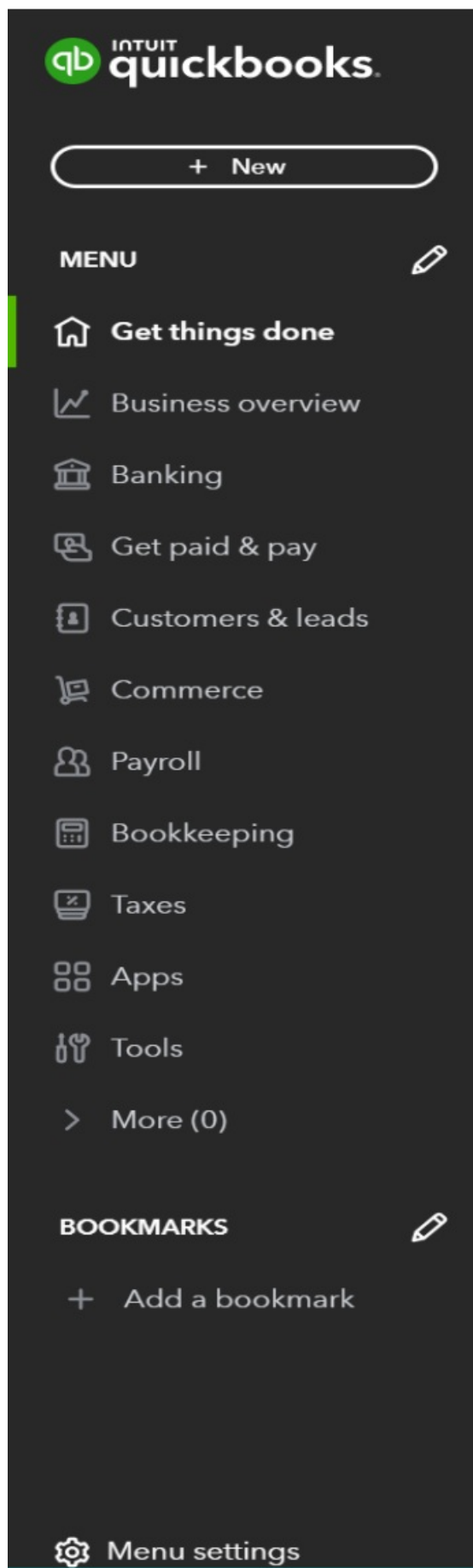
- Select the Apps icon and the following app should appear on your screen. The app name is called Click2Pay by Paya.
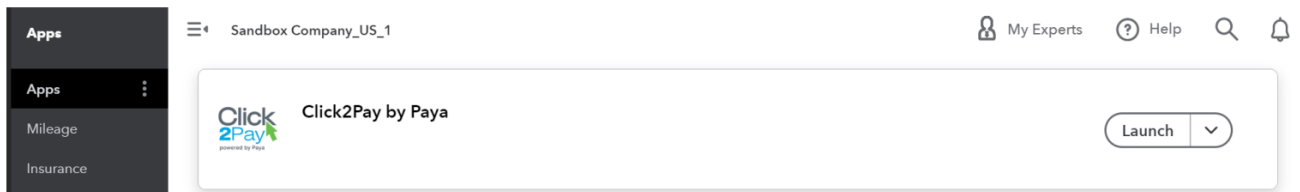
- This will confirm the installation of Click2Pay within your QuickBooks Online account has been successfully linked.

This concludes the setup and configuration process of Click2Pay and QuickBooks Online.

## Documents / Resources

| | |
|---|---|
|  | **paya CLICK2PAY Setup or Configuration** [pdf] User Guide<br>CLICK2PAY, Setup or Configuration, CLICK2PAY Setup or Configuration |

## References

- **Intuit Accounts - Sign In**
- **Click2Pay**