

paya Click2Pay Software Instructions

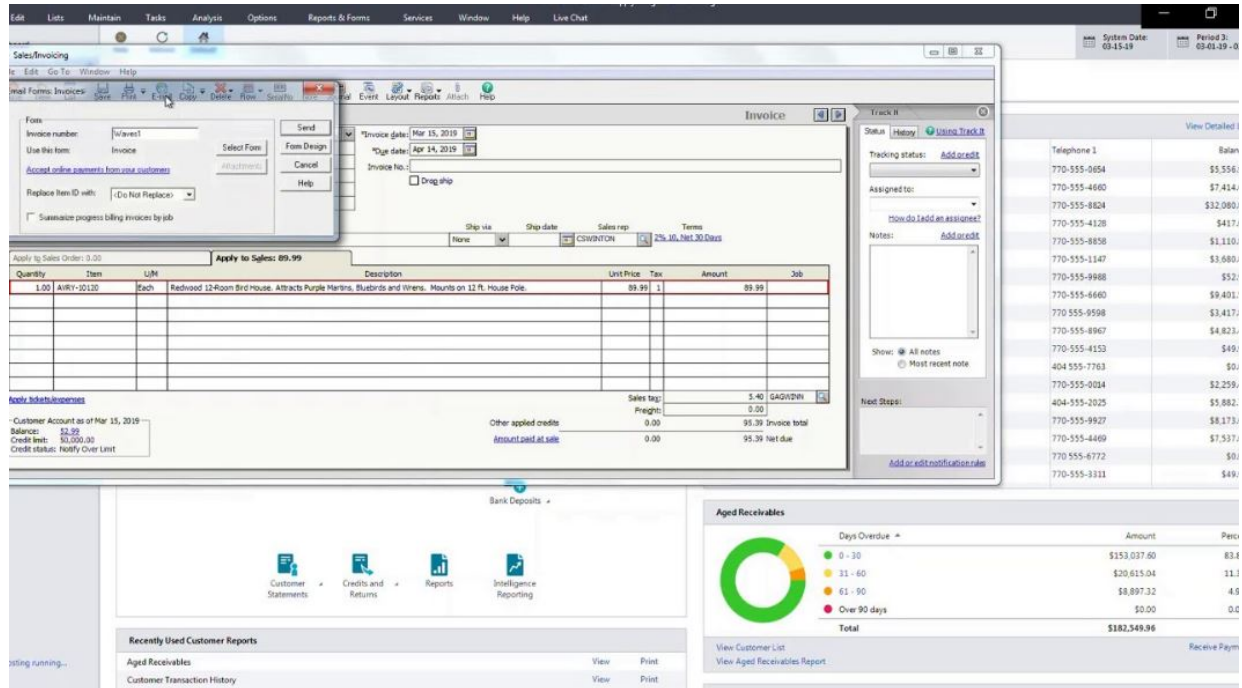
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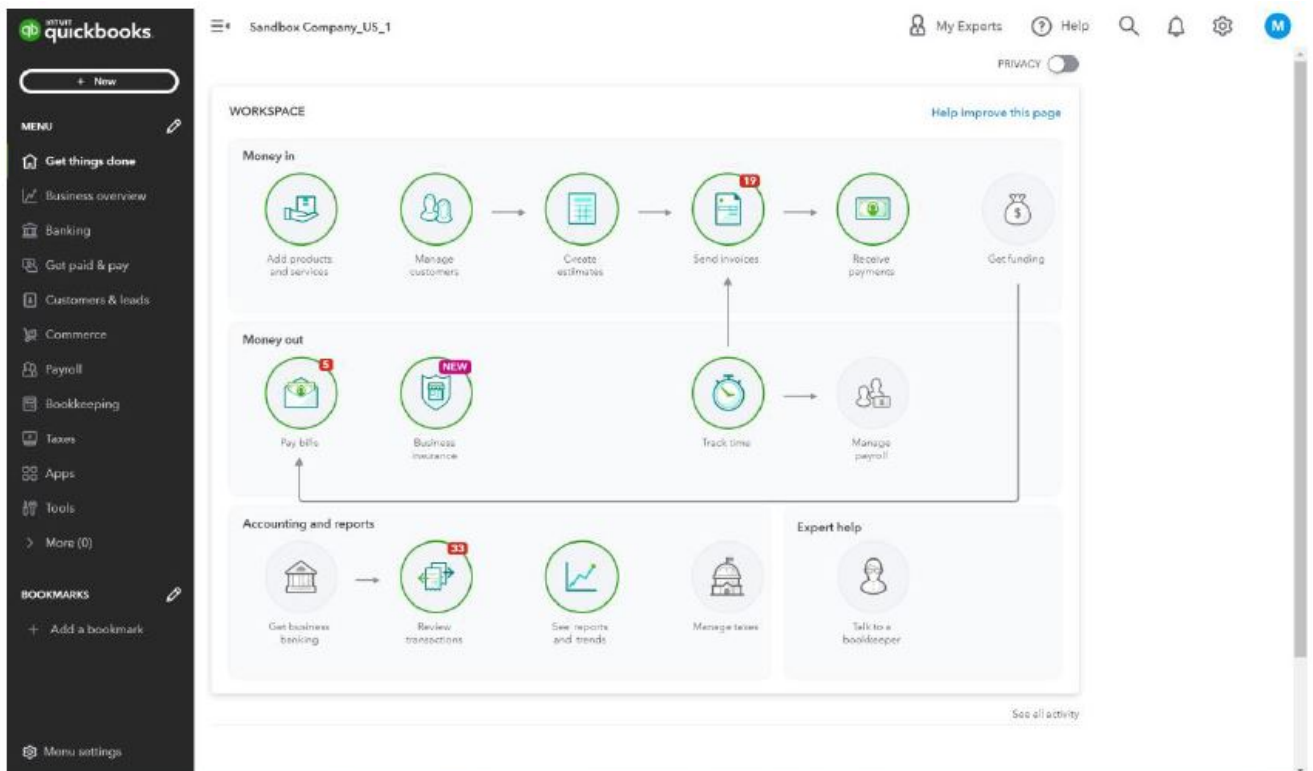


paya Click2Pay Software

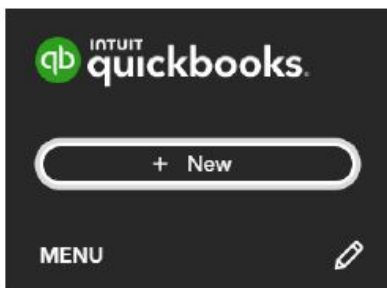


Processing within QuickBooks Online using Click2Pay

- Log into your QuickBooks Online account at <https://accounts.intuit.com/index.html>
- Once logged in, you should be on the home or dashboard screen.



- Click on the + New button at the top of the left menu bar to create an invoice on your customer's account.



- The following pop-up window will be displayed on the screen. Select Invoice under the Customers list.

CUSTOMERS	VENDORS	EMPLOYEES	OTHER
Invoice	Expense	Payroll	Bank deposit
Receive payment	Check	Single time activity	Transfer
Estimate	Bill	Weekly timesheet	Journal entry
Credit memo	Pay bills		Statement
Sales receipt	Purchase order		Inventory qty adjustment
Refund receipt	Vendor credit		Pay down credit card
Delayed credit	Credit card credit		
Delayed charge	Print checks		

[Show less](#)

- A blank invoice will appear on the screen to be filled out.

Invoice

[Share](#)
[Settings](#)
[Help](#)
[Close](#)

Customer

Customer email

Cu/Bec

Select a customer

Separate emails with a comma

Send later

Billing address

Terms

Invoice date

Due date

Net 30

11/11/2022

12/11/2022

Crew #

Click2Pay Link

Custom 3

Reminders

1 reminder(s) on

Tags

Start typing to add a tag

Manage tags

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1							
2							

Add lines

Clear all lines

Add subtotal

Subtotal

\$0.00

Message on invoice

Thank you for your business and have a great day!

https://q2web.shawnburt.com/Payments/PaymentLink?code=eyJURiRG6lmY3MzLW4M2ZmLTc3ZTt0NGRmOC0

Discount percent

Taxable subtotal

Need help with sales tax? [Learn more](#)

Select a sales tax rate

- Create your customer's invoice by filling out all the required fields and click on Save at the bottom of the screen.

Invoice Share Help X

Reminders Edit
1 reminder(s) on

Tags Manage tags
Start typing to add a tag

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1	11/11/2022	Concrete	Concrete for fountain installation	1	60	60.00	✓
2							

Add lines **Clear all lines** **Add subtotal**

Message on invoice
Thank you for your business and have a great day!
<https://c2pweb.shawinburt.com/Payments/PaymentLink?code=eyJ1IjBjC6lmY5K4M2Yndk3r3PTthU3BmcOCB>

Message on statement
If you send statements to customers, this will show up as the description for this invoice.

Attachments Maximum size: 20MB
Drag/Drop files here or click the icon
[Show existing](#)

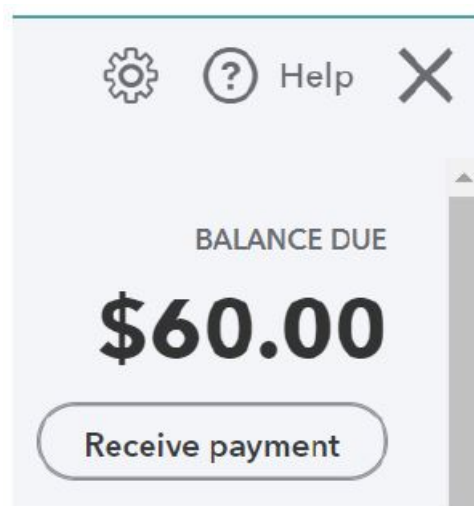
Subtotal \$60.00

Discount percent \$0.00
Taxable subtotal \$60.00
Need help with sales tax? [Learn more](#)

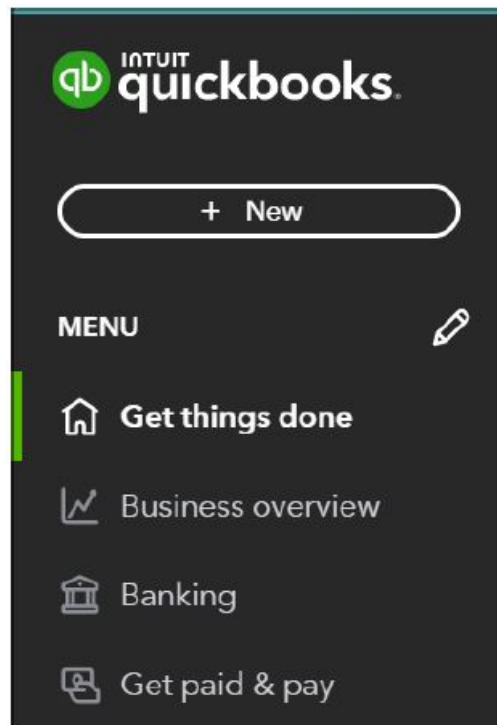
California **8%** **0.00**
Total **\$60.00**
Balance due **\$60.00**

Cancel **Clear** **Print or Preview** **Make recurring** **Customize** **Save** **Save and send**

- Close the invoice at the top right-hand corner of the screen by clicking on the X.



- You should now be back at the home or dashboard screen of QuickBooks Online. Next, click on Get paid & pay from the menu bar on the left-hand side of the screen.



- Search for the customer on the Get paid & pay screen as shown below. Click on the name of the customer to view their invoices.

CUSTOMER ▲ / COMPANY	PHONE	OPEN BALANCE	ACTION
<input type="checkbox"/> Amy's Bird Sanctuary Amy's Bird Sanctuary	(650) 555-3311	\$139.00	Receive payment ▼
<input type="checkbox"/> Bill's Windsurf Shop Bill's Windsurf Shop	(415) 444-6538	\$85.00	Receive payment ▼
<input type="checkbox"/> Cool Cars Cool Cars	(415) 555-9933	\$1,010.80	Receive payment ▼

- Locate the open invoice you just created for the selected customer. Click on an action you would like to complete to send the invoice to the customer. The invoice can either be printed and emailed to the customer or you can copy and paste the payment link within an email template.

DATE	TYPE ▲	NO.	MEMO	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
11/11/2022	Invoice	1063		12/11/2022	\$64.80	\$64.80	Open	Receive payment ▼

- The customer should receive an email with the attached invoice if that was the option selected or with the payment link pasted within an email template.

Sandbox Company_US_1
123 Sierra Way
San Pablo, CA 87999 US
noreply@quickbooks.com

INVOICE

BILL TO
Grace Pariente
Cool Cars
65 Ocean Dr.
Half Moon Bay, CA 94213

INVOICE # 1063
DATE 11/11/2022
DUE DATE 12/11/2022
TERMS Net 30

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
11/11/2022	Concrete	Concrete for fountain installation	1	60.00	60.00T

NDk4OS1iMjklWE5NTUxNjE4NzNkYSIsIk1lcmNoYW50SUQlOUJkYWE1MWM5Ny1hZGZILTQzYmMkOWYyNC03OWQ0OTYzNDU5NDQlLCJQbGF0Zm9ybUIEjoiYTE5ZT

- The payment link is found on the invoice within QuickBooks Online. Copy the payment link to be pasted within an email template that will be sent to the customer.

Invoice #1063

Reminders [Edit](#)
1 reminder(s) on

Tags [?](#)
Start typing to add a tag

#	SERVICE DATE	PRODUCT/SER
1	11/11/2022	Concrete
2		

Add lines
Clear all lines
Add subtotal

Message on invoice
Copy and paste Click2Pay Payment link to pay:
<https://c2pweb.shawnburt.com/Payments/PaymentLink?code=eyJJCi6jU5MDdhZjczLWEzYjQrNDk4OS1iMjklWE5NTUxNjE4NzNkYSIsIk1lcmNoYW50SUQlOUJkYWE1MWM5Ny1hZGZILTQzYmMkOWYyNC03OWQ0OTYzNDU5NDQlLCJQbGF0Zm9ybUIEjoiYTE5ZT>

- The customer will need to click on the payment link at the bottom of the invoice or within the email to make a payment. Once the payment link is selected, the customer will be redirected to the secure payment page to make a payment. This payment page can be rebranded for your company, if desired.

The screenshot shows a Click2Pay invoice interface. At the top, there is a green circular logo with 'qb' and the text 'shawn qbo test'. Below this, the 'Total amount' is displayed as '\$64.80' in blue, and the 'Balance amount' is also '\$64.80' in blue. The status is 'UNPAID' in a red pill-shaped button. A horizontal line separates the header from the 'Document info' section. On the left, under 'Document info', are fields for 'Type:', 'Customer:', 'Document date:', and 'Document due date:'. On the right, corresponding values are listed: 'Invoice #1063', 'Cool Cars~3', '11/11/2022', and '12/11/2022'. A blue link 'View PDF file' is positioned above the invoice details. At the bottom, there is a large green button labeled 'PAY HERE'. Below this button, there is a link that says 'Create an account or Sign In to Click2Pay'.

- The customer will review the invoice and click on the Pay Here button to make a payment on the invoice.
 - If the setting to allow customers to create a Click2Pay account is turned on, then the customer will be able to click on the link below the Pay Here button to create an account or sign in to Click2Pay to pay future invoices or pay multiple invoices at a time.
 - If the setting to allow customers to create a Click2Pay account is turned off, the payment link is anonymous and the customer will not be able to create or sign into a Click2Pay account. Only one invoice can be paid with the anonymous payment link.
 - The Click2Pay customer account setting, if turned on, will be available to all your customers. If you would like to provide to only a select few customers or only to a special group of customers, leave this setting off and manual create accounts within the merchant admin Click2Pay account. The instructions for this process will be shown towards the end of this document.
- The secure payment page is shown below. The customer will review the total amount due then choose their desired payment method.

The screenshot shows the Click2Pay secure payment page. It is divided into two main sections: 'Payment' on the left and 'Billing Details' on the right. In the 'Payment' section, there is a blue header with 'Pay Invoice 1063' and a white box showing 'Total Amount Due: \$ 64.80'. Below this, under 'Choose Payment Method', there are two options: 'ACH (eCheck)' and 'Credit card'. The 'Credit card' option is selected, showing logos for VISA, MasterCard, American Express, and Discover. There is also a checkbox for 'I'm not a robot' and a CAPTCHA image. In the 'Billing Details' section, there are input fields for 'Name *', 'Address 1 *', 'Address 2', 'City *', 'State *', 'Zip *', 'Country *' (with a dropdown menu showing 'United States'), 'Description', 'Email', and 'Phone'. At the bottom right, there are two buttons: 'Submit Payment' (green) and 'Close' (white).

- ACH (eCheck) and Credit Card are the payment methods available.
- **Please note:** ACH (eCheck) is only available if the merchant has been approved to offer this service to their

customers.

Choose Payment Method

ACH (eCheck)

Routing Number *

Account Number *

Credit card

VISA

MasterCard

DISCOVER

AMERICAN EXPRESS

Card Number *

Expiry Month *

Year *

CVV *

- Once all required fields are completed and the Submit Payment button has been clicked, the following screen should appear. It should read Payment Successful!

Transaction Details

✓

Payment Successful!

Amount Paid:

\$64.80

Transaction Number:

315473061966

- Close the payment confirmation window above to ensure the invoice shows status – paid and balance amount at \$0.00. Then click on the View PDF File link to open the invoice.



Total amount

\$64.80

Balance amount

\$0.00

Status

PAID

Document info

[View PDF file](#)

Type:

Invoice #1063

Customer:

Cool Cars-3

Document date:

11/11/2022

Document due date:

12/11/2022

PAY HERE

[Go to Click2Pay website](#)

- The PAID invoice is displayed.

Sandbox Company_US_1
123 Sierra Way
San Pablo, CA 87999 US
noreply@quickbooks.com

INVOICE

BILL TO

Grace Pariente
Cool Cars
65 Ocean Dr.
Half Moon Bay, CA 94213

INVOICE # 1063

DATE 11/11/2022

DUE DATE 12/11/2022

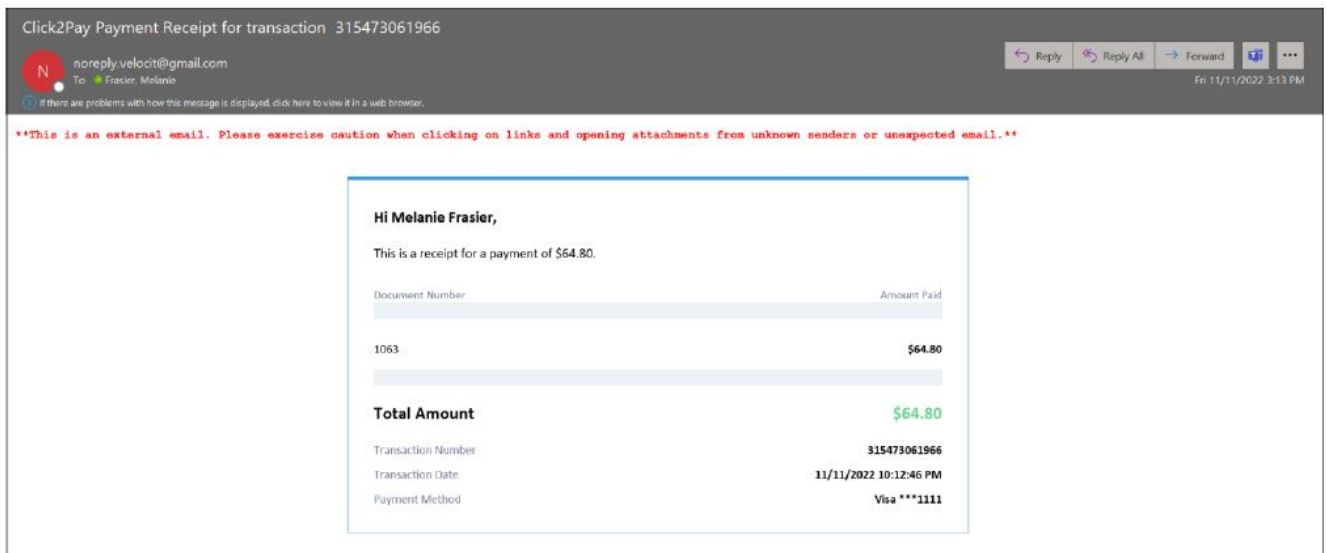
TERMS Net 30

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
11/11/2022	Concrete	Concrete for fountain installation	1	60.00	60.00T

INDk4OS1iMjKlWE5NTUxNjE4NzNkYSIsik1IcmNoYW50SUQIOUkyWE1MWM5Ny1h7sZL QzYmMkOWYyNC03OWQ0OTYzNDU5NDQlCjQObGF0Zm9ybUIEjoiYTE5Z

PAID

- A payment receipt is automatically emailed to the customer if their email address was entered on the payment page or they have an email address on file.

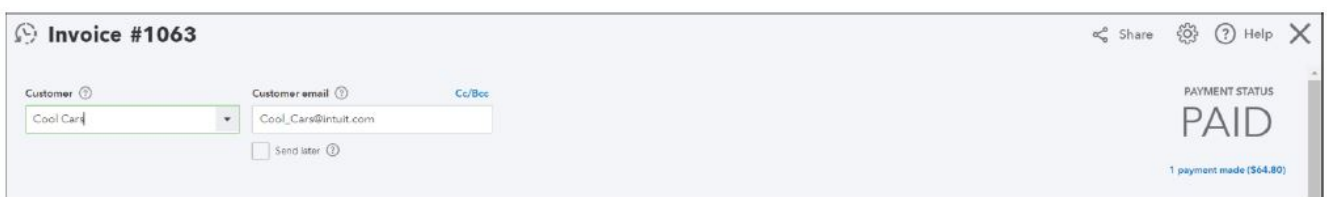


- When viewing the invoice within QuickBooks Online, the status should change from Open to Paid and the Balance will show \$0.00.

<input type="checkbox"/>	DATE	TYPE ▲	NO.	MEMO	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
<input type="checkbox"/>	11/11/2022	Invoice	1063		12/11/2022	\$64.80	\$64.80	Open	Receive payment ▼

<input type="checkbox"/>	DATE	TYPE ▲	NO.	MEMO	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
<input type="checkbox"/>	11/11/2022	Invoice	1063		12/11/2022	\$0.00	\$64.80	Paid	Print ▼

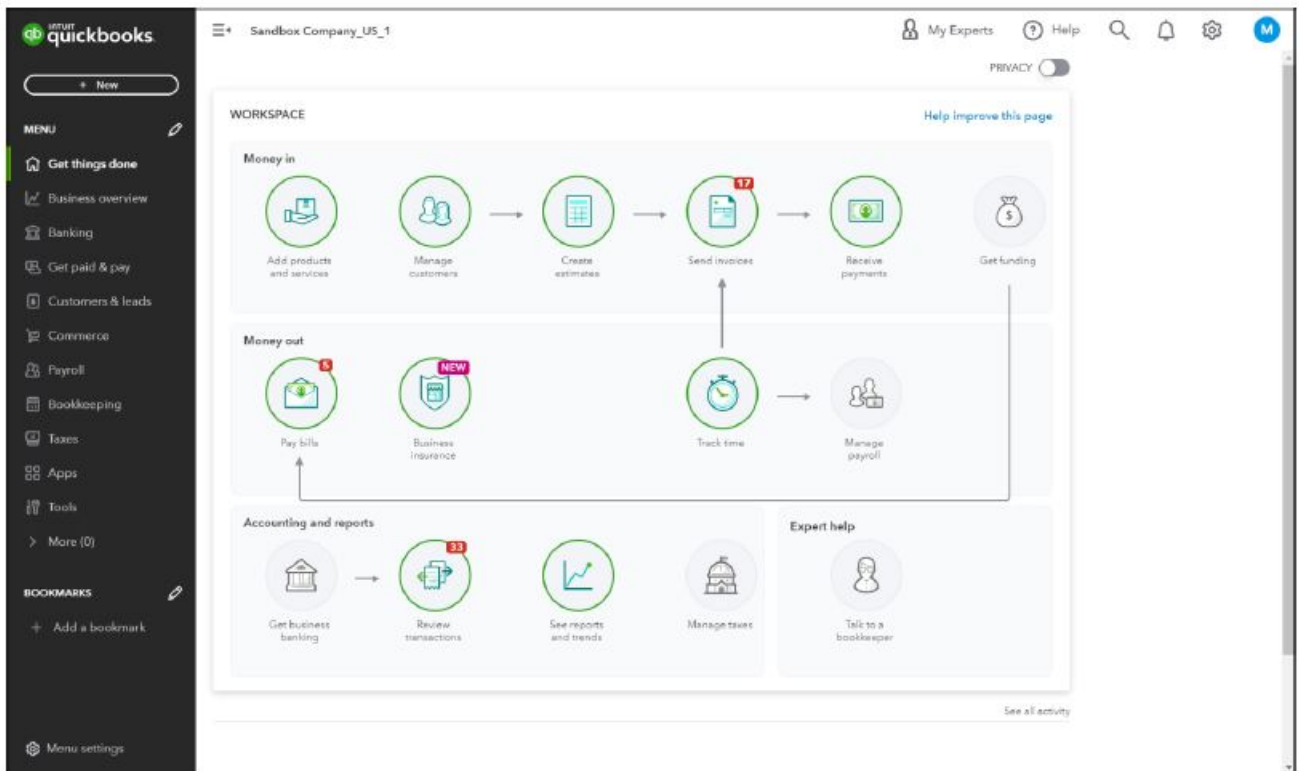
- Select the action of View/Edit to show the original Invoice. The Payment Status should display PAID at the top right-hand corner.



- **PLEASE NOTE:** Voiding or deleting invoices within QuickBooks Online does not void the payment from Click2Pay or from the customer's bank account. This process needs to be completed within the payment gateway in order to provide funds back to the customer. \

How to Navigate to Click2Pay from QuickBooks Online

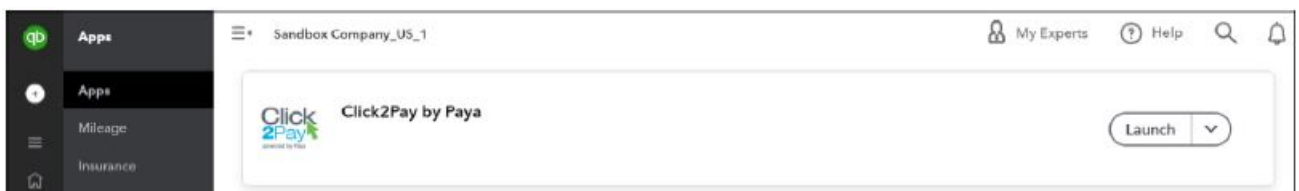
- Once logged into QuickBooks Online, you should be at the Home screen.



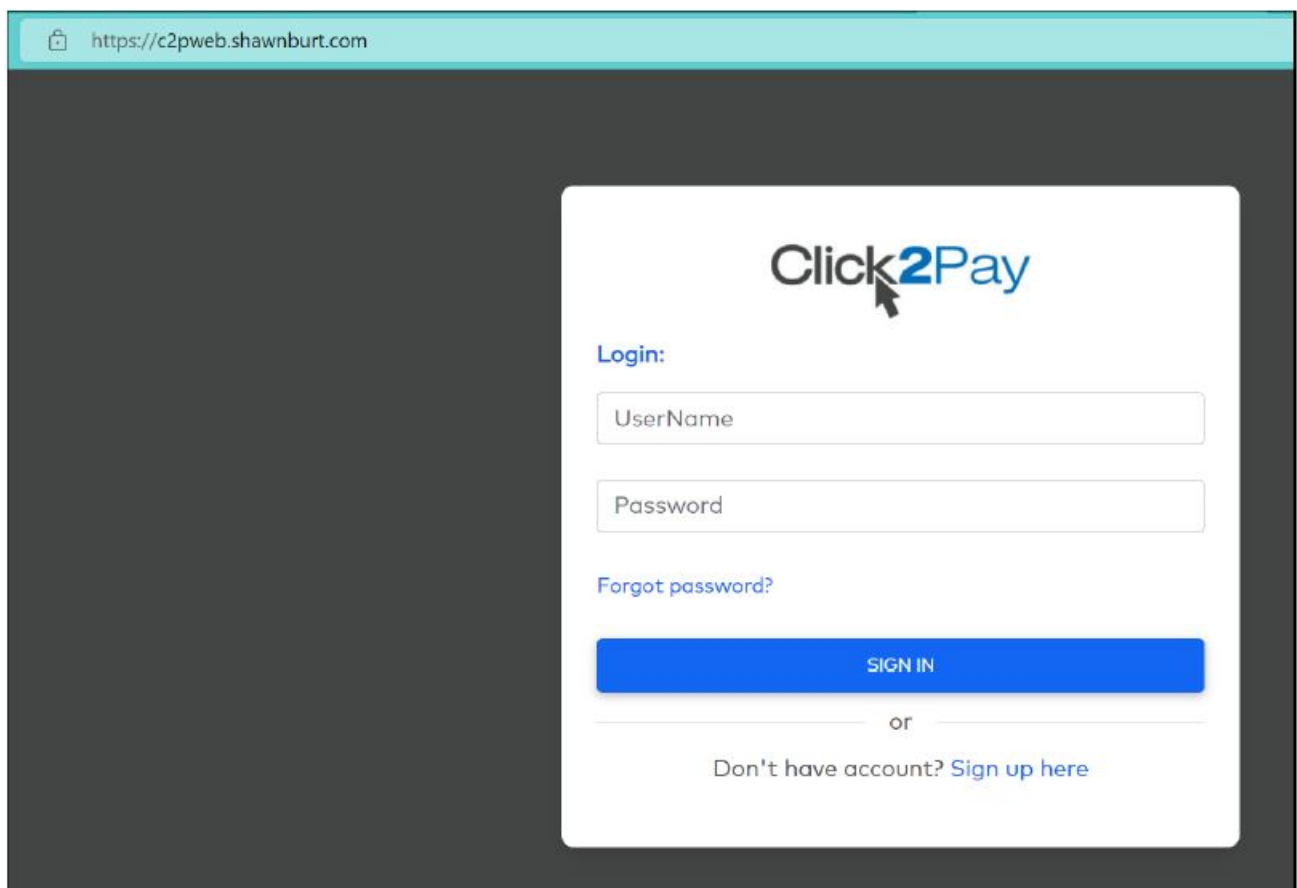
- Navigate to the Apps icon on the MENU located on the left-hand side of the screen. Click on the three lines and right arrow icon to expand the MENU if it is not present.



- The following app should appear on the screen once the Apps icon is selected. The app is named Click2Pay by Paya.



- Click on the Launch button to navigate to Click2Pay from QuickBooks Online.
- A new tab will open in your web browser to prompt you to log into your Click2Pay account. The website address is <https://c2pweb.shawnburt.com/>



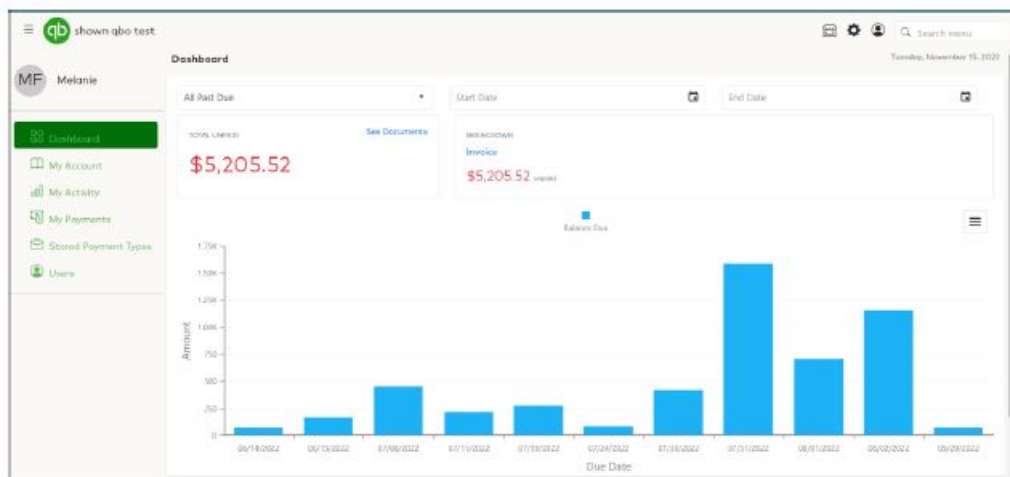
- Enter your credentials and click on SIGN IN to open your Click2Pay account.

Create/Maintain Users within Click2Pay

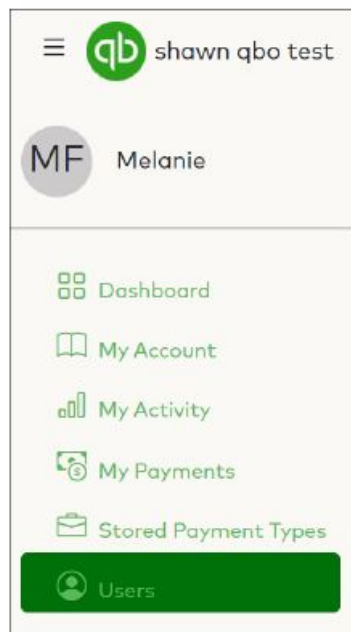
- Access your Click2Pay account. The website address is <https://c2pweb.shawnburt.com/>
- Enter your Login credentials then click on SIGN IN.



- Once logged in, you should be at the Dashboard as shown below.



- Click on Users from the menu bar on the left-hand side of the screen.



- The following screen should appear. Click on the + sign at the top right-hand corner to add a new user.

							+	Search...
	Name	Email	Username	First Name	Last Name	Roles		
		Q	Q	Q	Q	(All)		
	Cool Cars	shawn+cool@shawnburt.com	CoolCars	Cool	Cars	MerchantCustomer		
	Melanie Frasier	melanie.frasier@paya.com	melanie.fr...	Melanie	Frasier	Merchant		
	John Doe	mmfrasier@gmail.com	John.Doe	John	Doe	MerchantCustomer		
	Shawn Burt	shawn@shawnburt.com	shawnqbo	Shawn Burt		Merchant		

- The following pop-up window will appear. Complete the required fields at the top of the screen.
 - Roles – 2 options:**
 - Merchant – access to your admin merchant account
 - Merchant Customer – access to a customer account (this is how you create an account manually or on behalf of your customer)

First Name: * Last Name: *

Email: * Username: *

Roles: * Lock user until:

Merchants:

+ ↺

Use as Default	Merchant	Customer
No data		

- Click on Save once all fields are completed.
- The main user screen will appear. Click on the pencil icon next to the user(s) you just created to edit the user account.

	Melanie Frasier	melanie.frasier@paya.com	melanie.fr...	Melanie	Frasier	Merchant
	John Doe	mmfrasier@gmail.com	John.Doe	John	Doe	MerchantCustomer

- Click on the + sign under Merchants.

Merchants:

+ ↺

Use as Default	Merchant	Customer
<input type="checkbox"/>	shawn qbo test	

- If the user has a Merchant role, then select your Merchant name using the drop-down menu in the Merchant column as shown above. There should only be one merchant name listed unless you have more than one merchant account.
- If the user has a Merchant Customer role, then select your Merchant name and the Customer name using the drop-down menus in the Merchant and Customer columns as shown below.

Merchants:

+ ↺

Use as Default	Merchant	Customer
<input checked="" type="checkbox"/>	shawn qbo test	Grace Pariente - Cool Cars-3

- Once the Merchant and/or Customer has been selected, click on the button shown below.

- A confirmation pop-up window will appear. Select Yes to send the login credentials to the user.

Confirmation

Are you sure you want to send the login credentials?

Yes

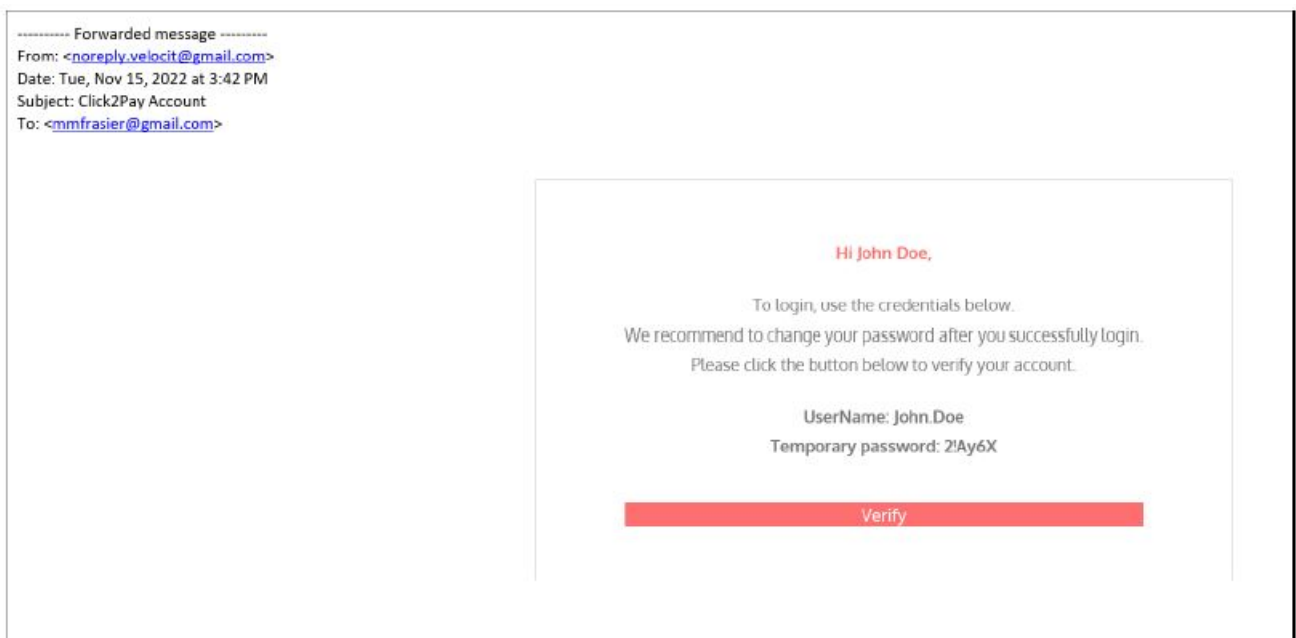
No

- Click on Save at the bottom of the screen. You will then return to the main user screen.


Save

Cancel



- The user will receive the following email to complete the setup of their user account. The user will need to click on the Verify button to begin the verification process. Once this process has been completed, the user will have full access to their Click2Pay user account.



Documents / Resources

	<p>paya Click2Pay Software [pdf] Instructions Click2Pay, Software, Click2Pay Software</p>
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References

-  [Intuit Accounts - Sign In](#)
-  [Click2Pay](#)