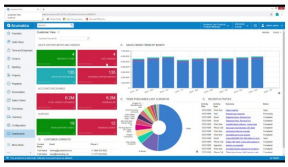

paya CLICK2PAY Web Usage Instructions

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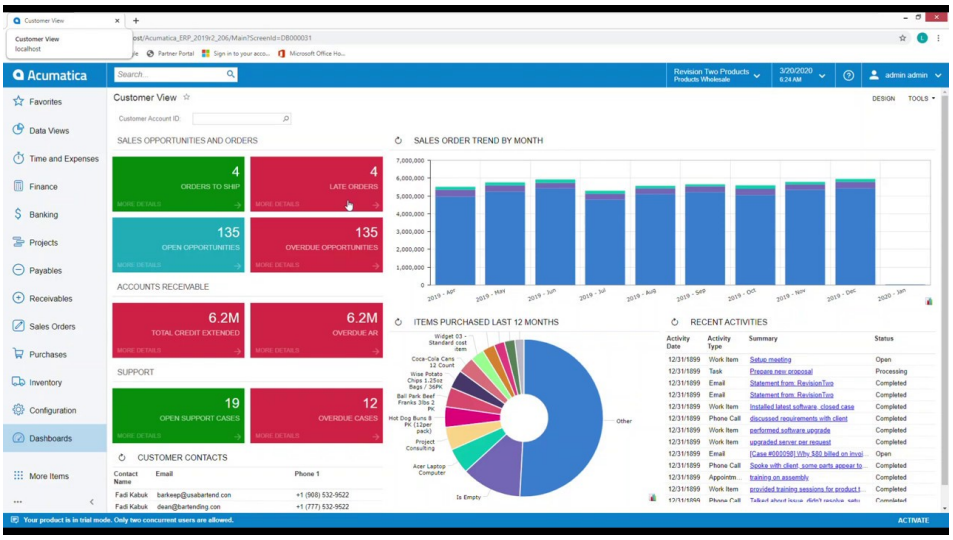
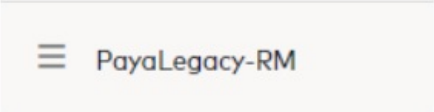
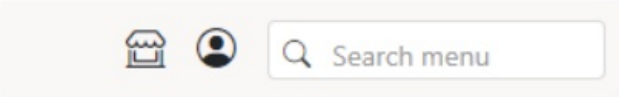
paya CLICK2PAY Web Usage



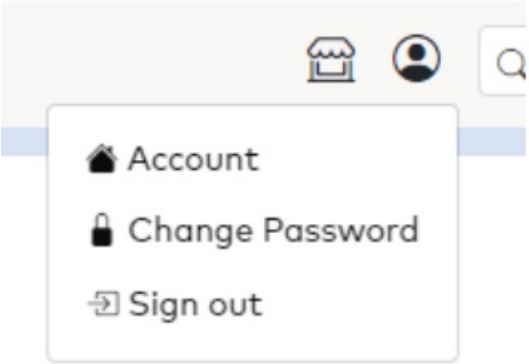
Top Bar

- Navigation
  - Hamburger Icon (3 lines) >> show / hide the left side menu
  - Merchant Company Name is displayed next to Hamburger Icon
  - Merchant selection (store front icon) >> shows all the Merchants for the user logged in.
  - Search block



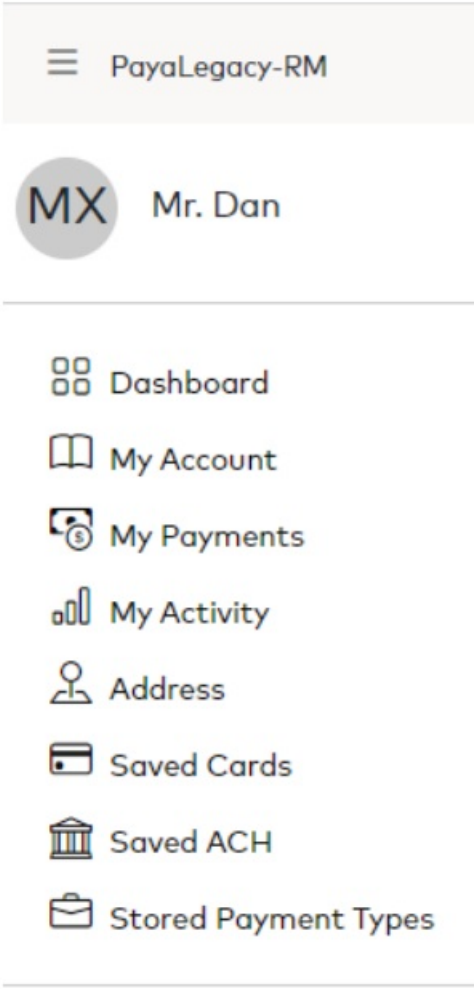


  - Person Icon
    - Account >> Link to user Profile
    - Change Password
    - Sign Out



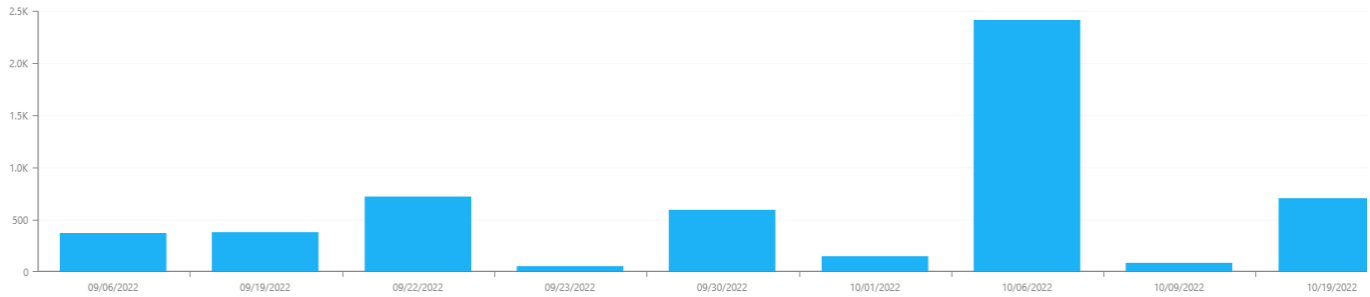
Left Menu Options

Shows Username (first name) above the available menu items.

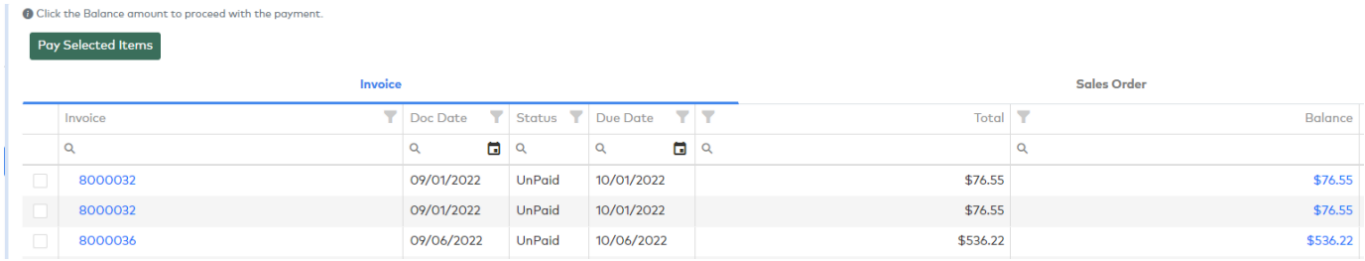


Dashboard
The dashboard provides an account overview with links to review documents and make payments.

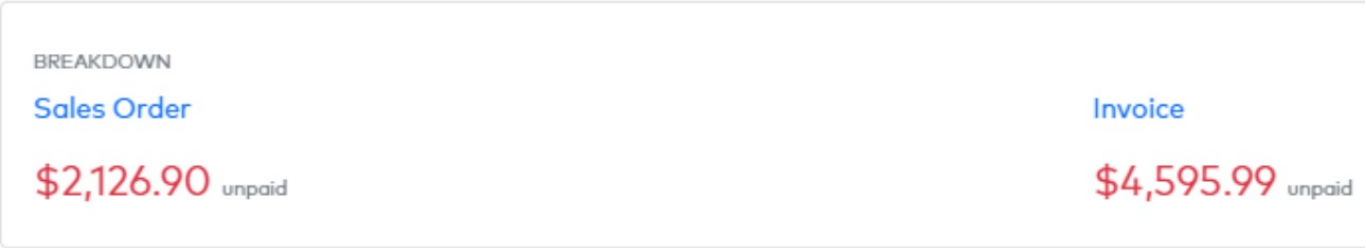
Blue highlighted words provide for drill down to Documents / Sales Orders / Invoices.



SEE DOCUMENTS
You can click the “See Documents” link in the top-right corner in to be taken to the “My Activity” screen and review the documents that comprise the total unpaid balance.

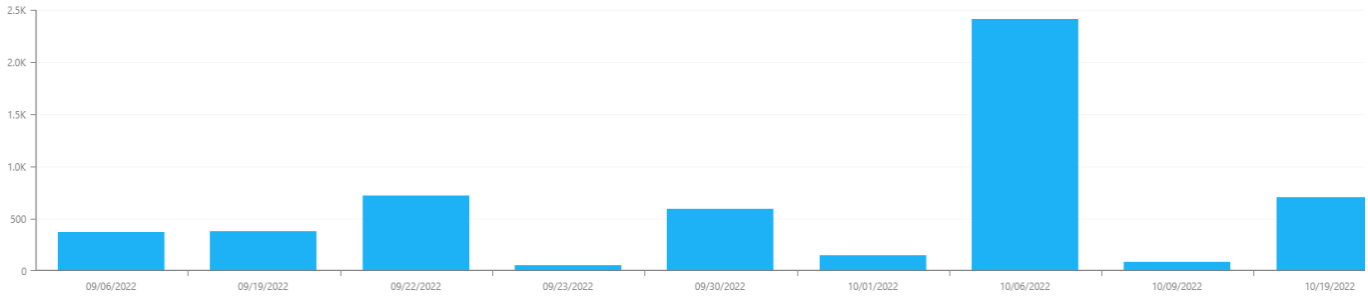


BREAKDOWN
The breakdown section shows the same amount as the “Total Unpaid” section, breaking the total down by document type.

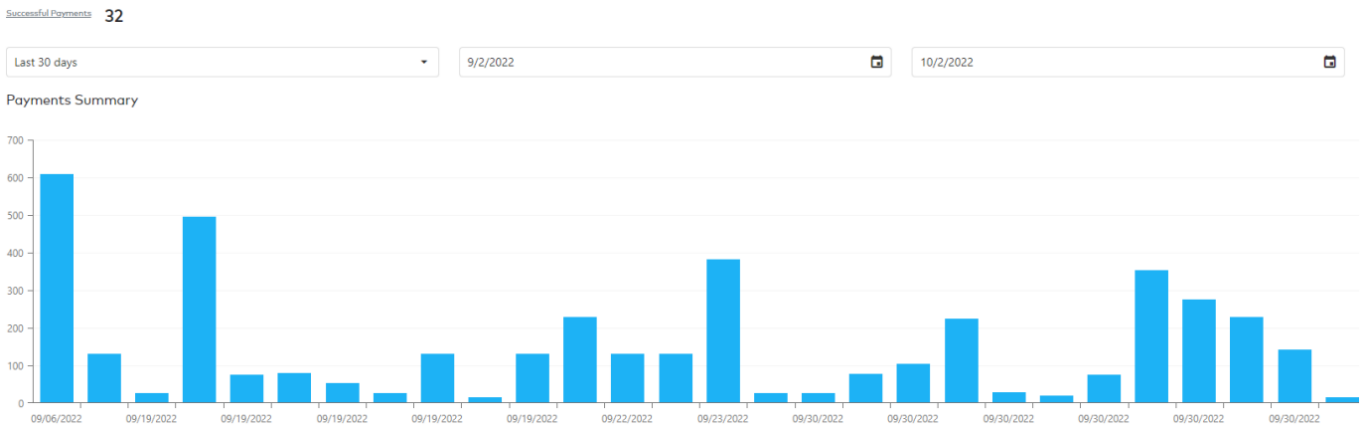


PAST DUE CHART

The past due chart contains a bar graph which shows the number of outstanding payments broken down by day. You can use the dropdowns or date selectors to shrink or expand the view based on the given range.



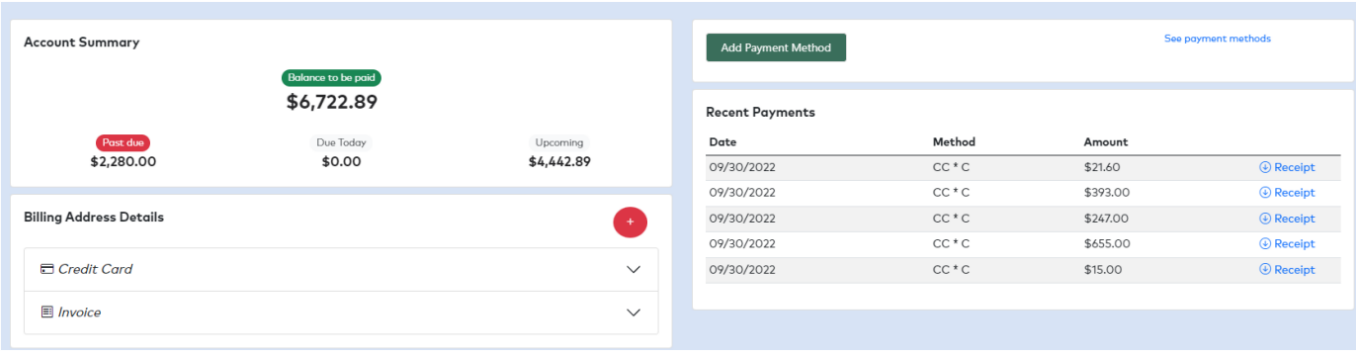
PAYMENTS SUMMARY



The payments summary section displays a bar graph depicting when payments were made. You can use the dropdowns and date selectors to shrink or expand the chart based on the given range. The “Successful Payments” link will take you to the “My Payments” screen, filtered to show records that comprise the current selection in the bar graph.

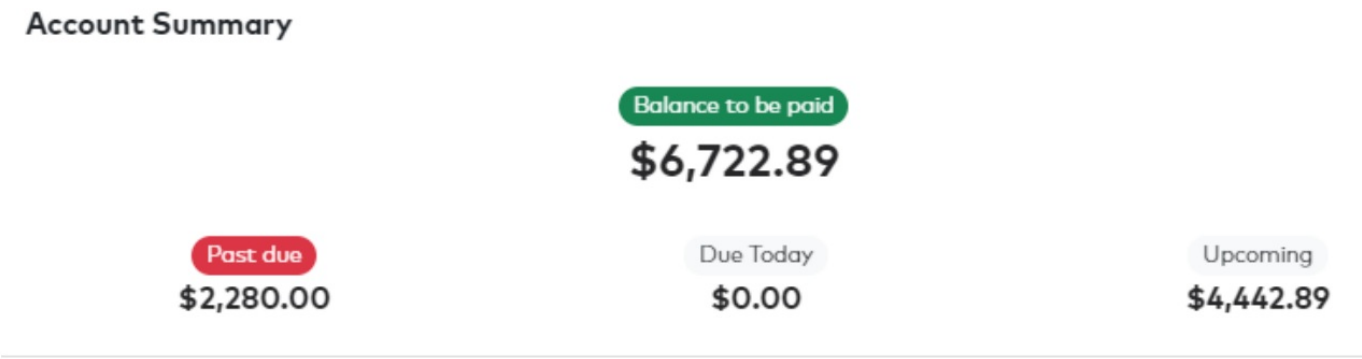
My Account

The account screen shows an overview of important information associated with your account: Balance due, payment methods, addresses, and recently made payments.



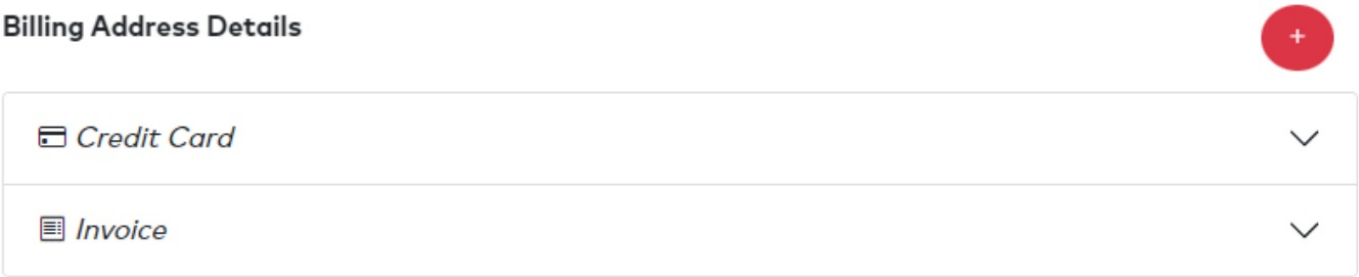
ACCOUNT SUMMARY

The account summary shows the total balance due on your account



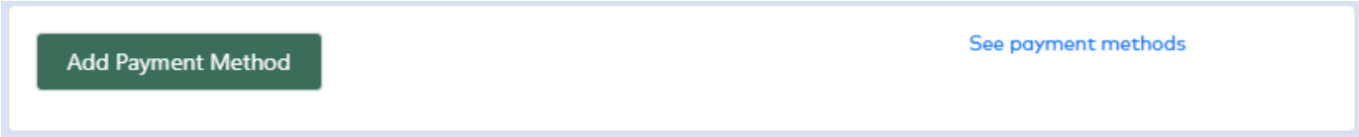
BILLING ADDRESS DETAILS

The billing address details section allows you to view and edit addresses saved for your account, as well as set new defaults and add new addresses by clicking the “+” button.



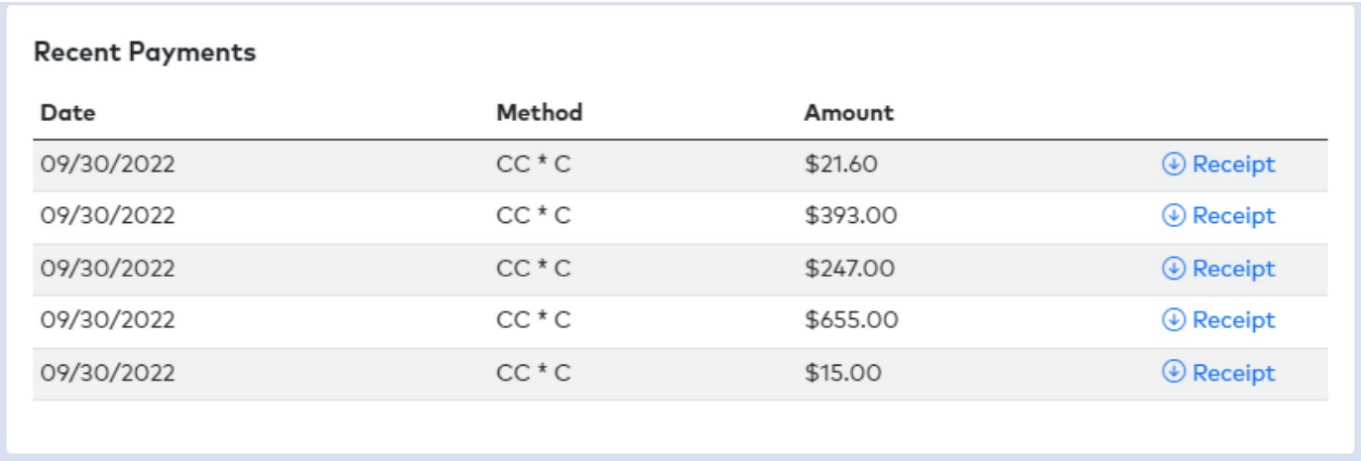
ADD PAYMENT METHOD

The add payment method section shows a button that will bring up the data entry screen to save a new card. You can also click “See payment methods” to be taken to the “Stored Payment Types” screen.



RECENT PAYMENTS

The recent Payments section shows a short list of the most recent payments made on your account.

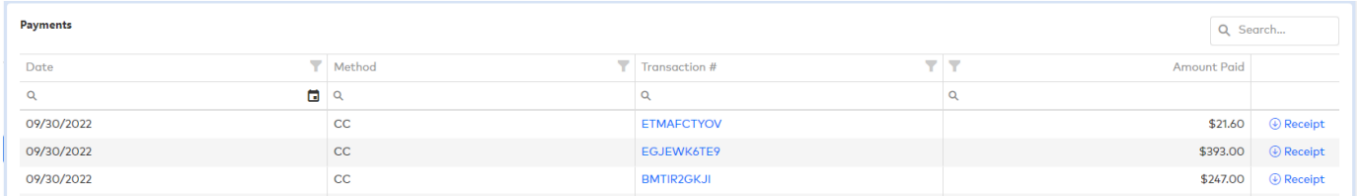


Recent Payments

Date	Method	Amount	
09/30/2022	CC * C	$21.60	Receipt
09/30/2022	CC * C	$393.00	Receipt
09/30/2022	CC * C	$247.00	Receipt
09/30/2022	CC * C	$655.00	Receipt
09/30/2022	CC * C	$15.00	Receipt

My Payments

The “My Payments” screen displays a list of payments that have been made on this account.

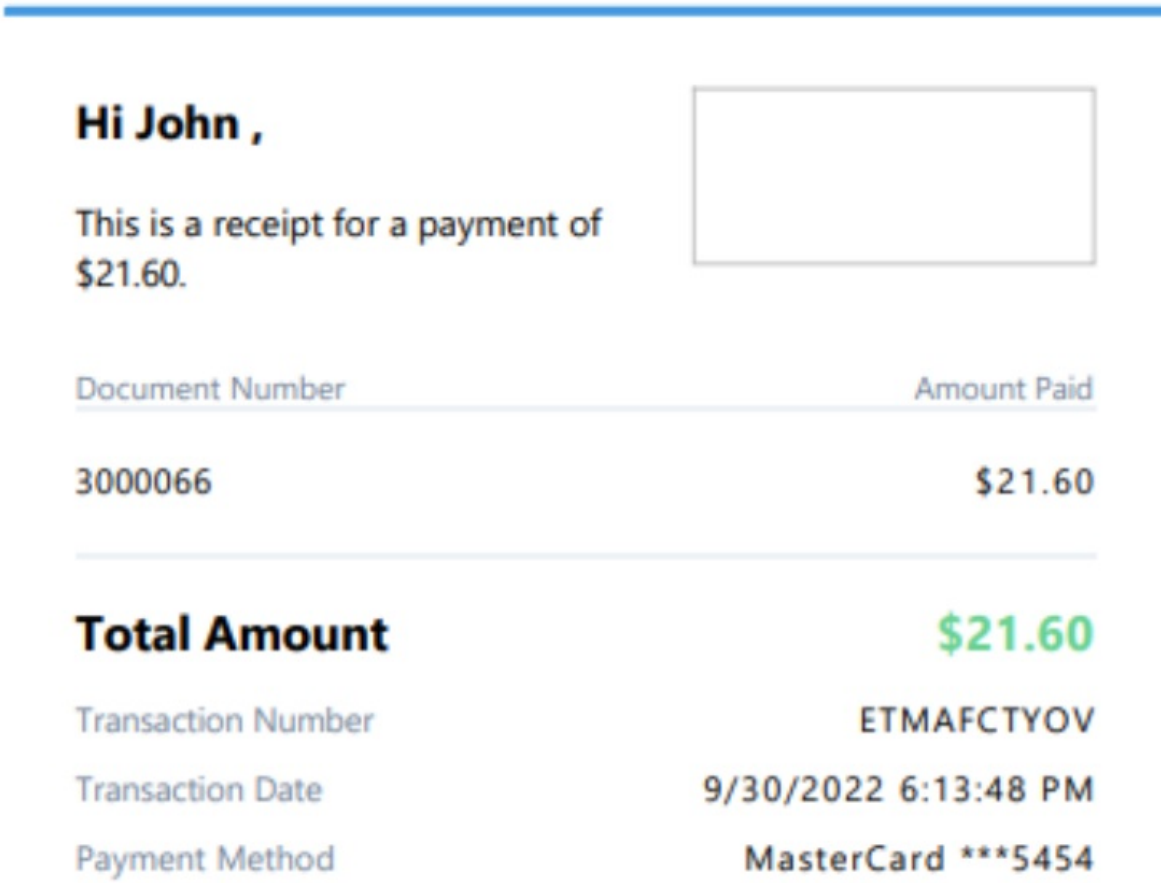


Payments

Search...

Date	Method	Transaction #	Amount Paid	
09/30/2022	CC	ETMAFCTYOV	$21.60	Receipt
09/30/2022	CC	EGJEWK6TE9	$393.00	Receipt
09/30/2022	CC	BMTIR2GKJI	$247.00	Receipt

Payment records include the date and method of the transaction, the amount that was paid, a link to further transaction details by clicking the Transaction #, and the ability to print a receipt by clicking the “Receipt” link.



Hi John ,

This is a receipt for a payment of $21.60.

Document Number	Amount Paid
3000066	$21.60

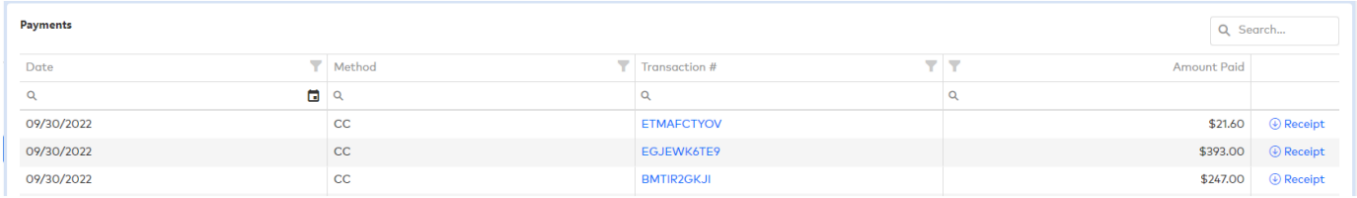
Total Amount $21.60

Transaction Number	ETMAFCTYOV
Transaction Date	9/30/2022 6:13:48 PM
Payment Method	MasterCard ***5454

Clicking the transaction # will redirect to the specified payment in the “My Activity” screen.

My Activity

The activity screen shows a list of all documents on your account. Here you can easily see the status of the document, the balance, and the amount to pay. This screen will also show documents that have been previously paid.
Checkboxes on the left will allow you to select multiple invoices to pay in one transaction.

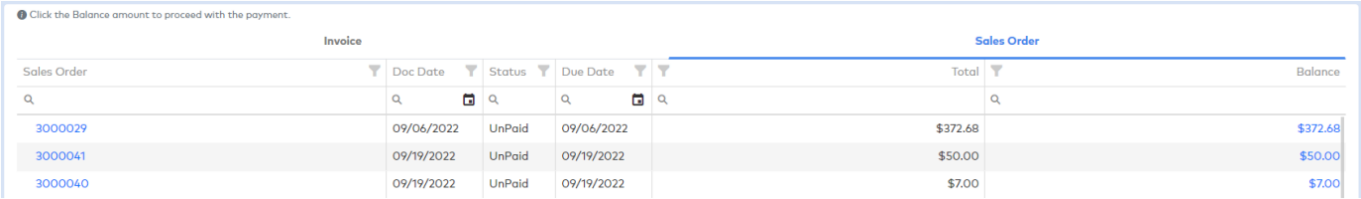


Payments

Search...

Date	Method	Transaction #	Amount Paid	
09/30/2022	CC	ETMAFCTYOV	$21.60	Receipt
09/30/2022	CC	EGJEWK6TE9	$393.00	Receipt
09/30/2022	CC	BMTIR2GKJI	$247.00	Receipt

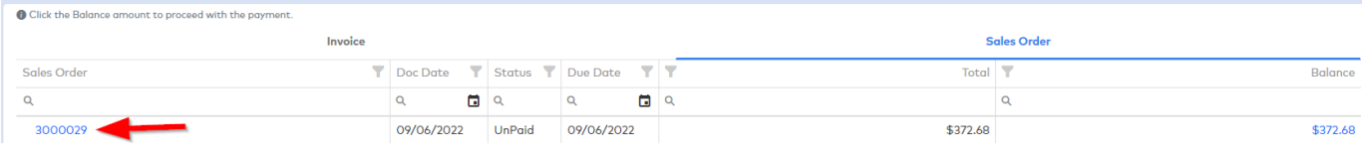
Sales Orders are paid one at a time by clicking on the BALANCE field.



Click the Balance amount to proceed with the payment.

Invoice				Sales Order	
Sales Order	Doc Date	Status	Due Date	Total	Balance
3000029	09/06/2022	UnPaid	09/06/2022	$372.68	$372.68
3000041	09/19/2022	UnPaid	09/19/2022	$50.00	$50.00
3000040	09/19/2022	UnPaid	09/19/2022	$7.00	$7.00

PDFs for the transactions can be displayed by clicking on the Invoice or Sales Order Number



Click the Balance amount to proceed with the payment.

Invoice				Sales Order	
Sales Order	Doc Date	Status	Due Date	Total	Balance
3000029	09/06/2022	UnPaid	09/06/2022	$372.68	$372.68

PAYMENTS

Invoice payments can be made by clicking on one or more checkboxes next to the Invoice Number then clicking on PAY SELECTED ITEMS.

XYZ Manufacturing Company

3000029
9/6/2022

0001
DAN

Dan's TV Repair
100 Old Newport Blvd
Suite 101
Newport Beach, CA 92660

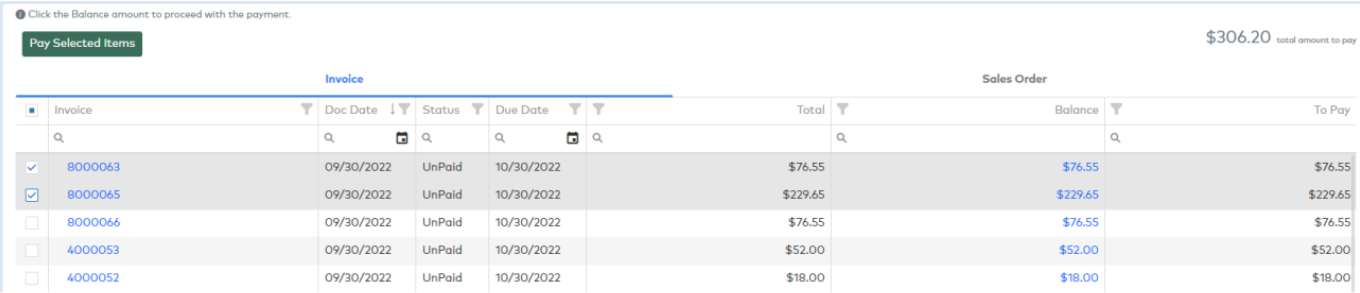
Dan's TV Repair
100 Old Newport Blvd
Suite 101
Newport Beach, CA 92660

Dan

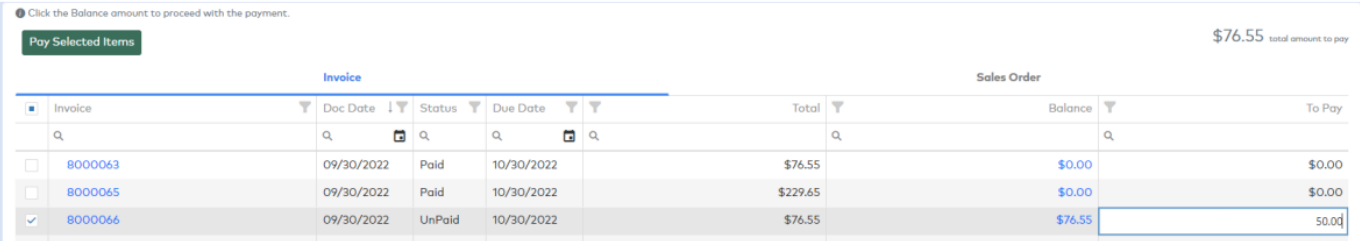
UPS BLUE

2% Ten Days, Net 30 Days

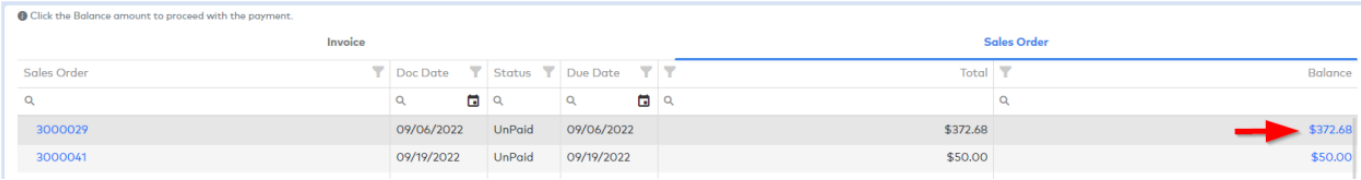
POWER-29010	EACH	2.00	0.00	0.00	186.34	372.68
POWER SUPPLY			Whse: 000			



Invoice amount to pay can be altered by selecting the invoice by checking the checkbox on the left side of the line and then clicking on the TO PAY column on the right – alter the TO PAY column to show the amount to pay



Sales Orders are paid one at a time by clicking on the BALANCE FIELD

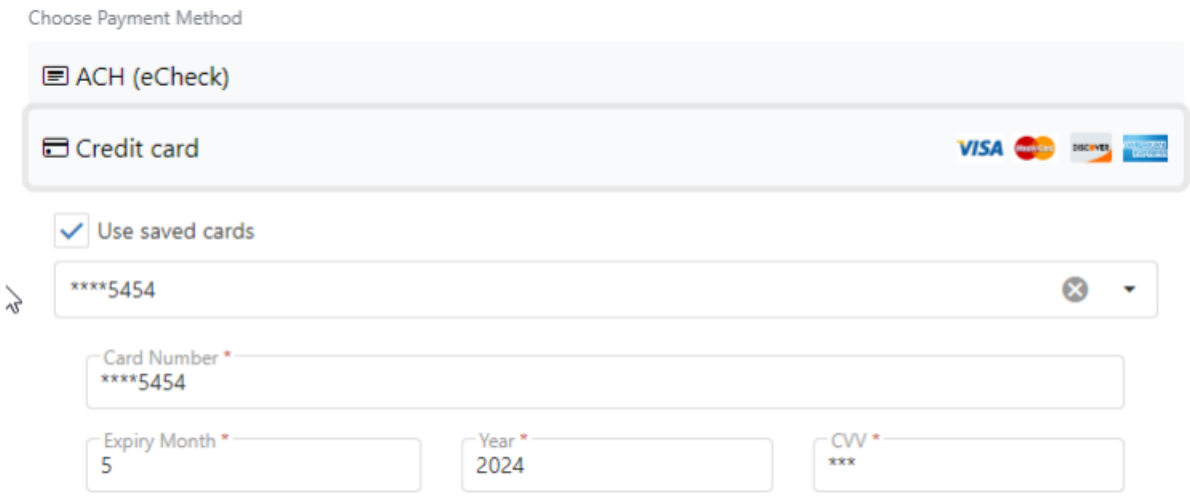


If a partial payment for a Sales Order is required – alter the amount on the PAYMENT screen that displays (see below blue screen)

PAYMENT SCREEN

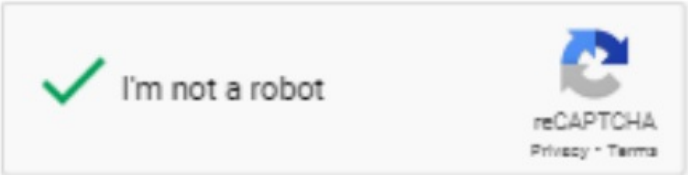
- **Top Section**
  - Will show Invoice(s) being paid
  - Will show the total amount of Invoice(s) selected

- ACH or Credit Card payments
  - Enter required information for the payment type selected
  - Select to use saved ACH / CARDS to auto populate stored card/ach information

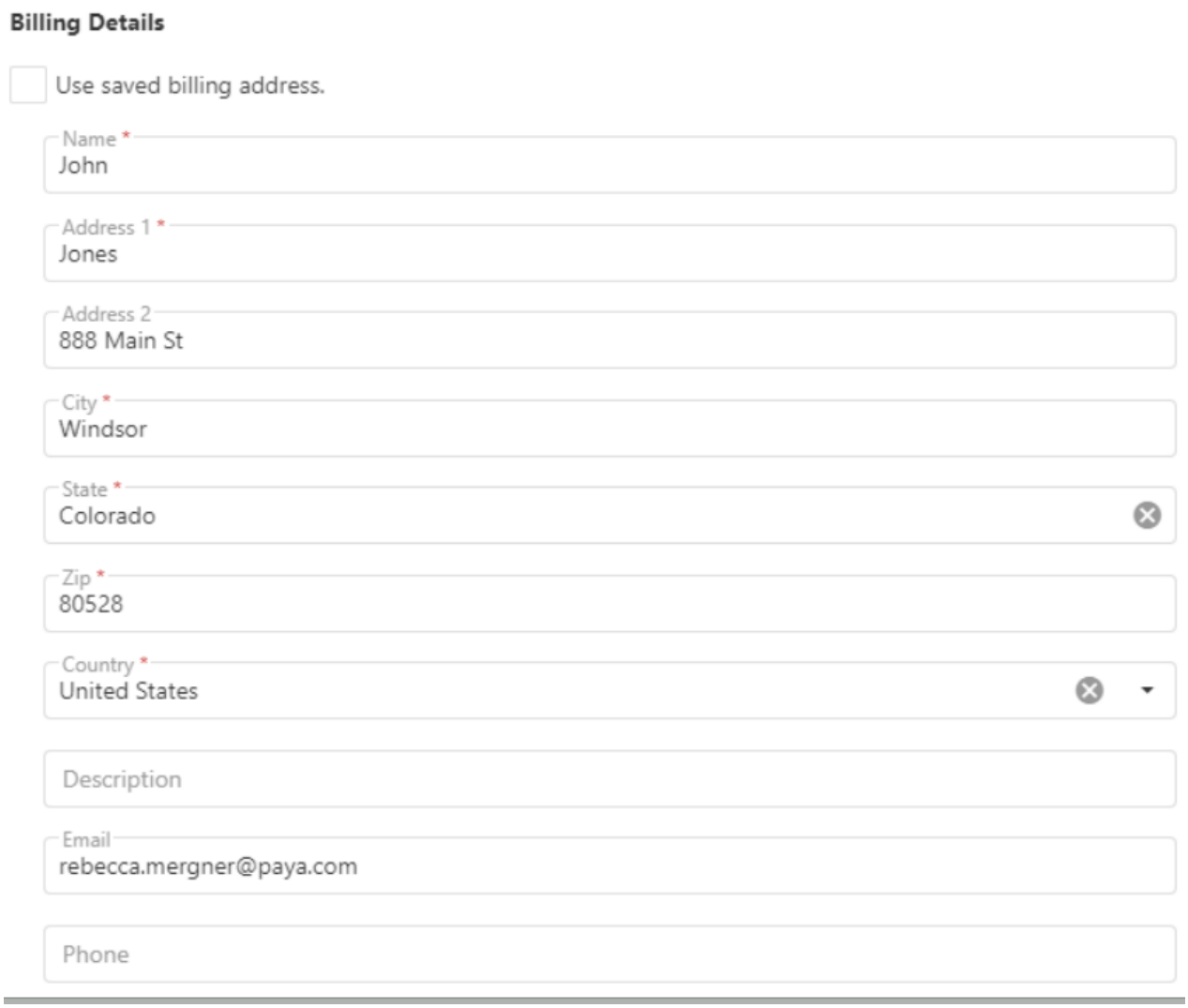


- **CAPTCHA**

  o Click on the I'm not a robot for security validation



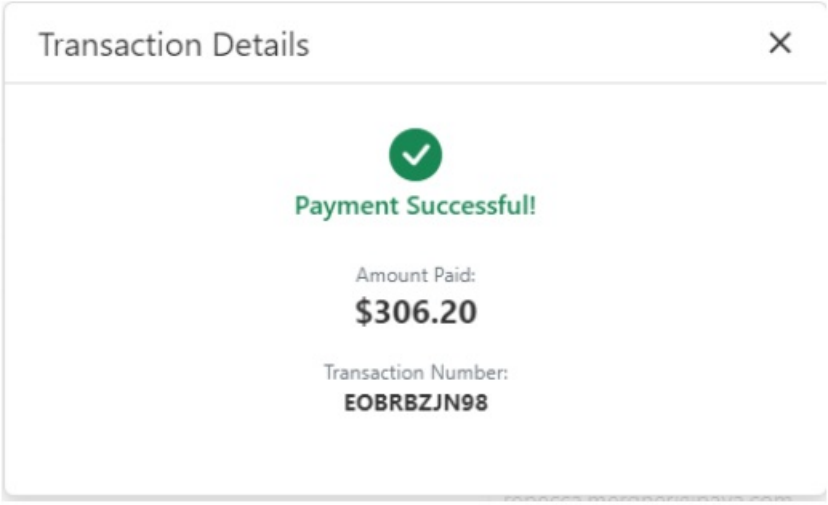
- **Billing Details**
  - Stored cards / ACH will populate the address information – verify the email address as it will be utilized to send the receipt
  - Enter address information for non-stored cards / ACH – verify the email address as it will be utilized to send the receipt



- **Submit Payment**

  When all the above have been accomplished click the SUBMIT PAYMENT button to process transaction

- Once processed the Transaction Details will display



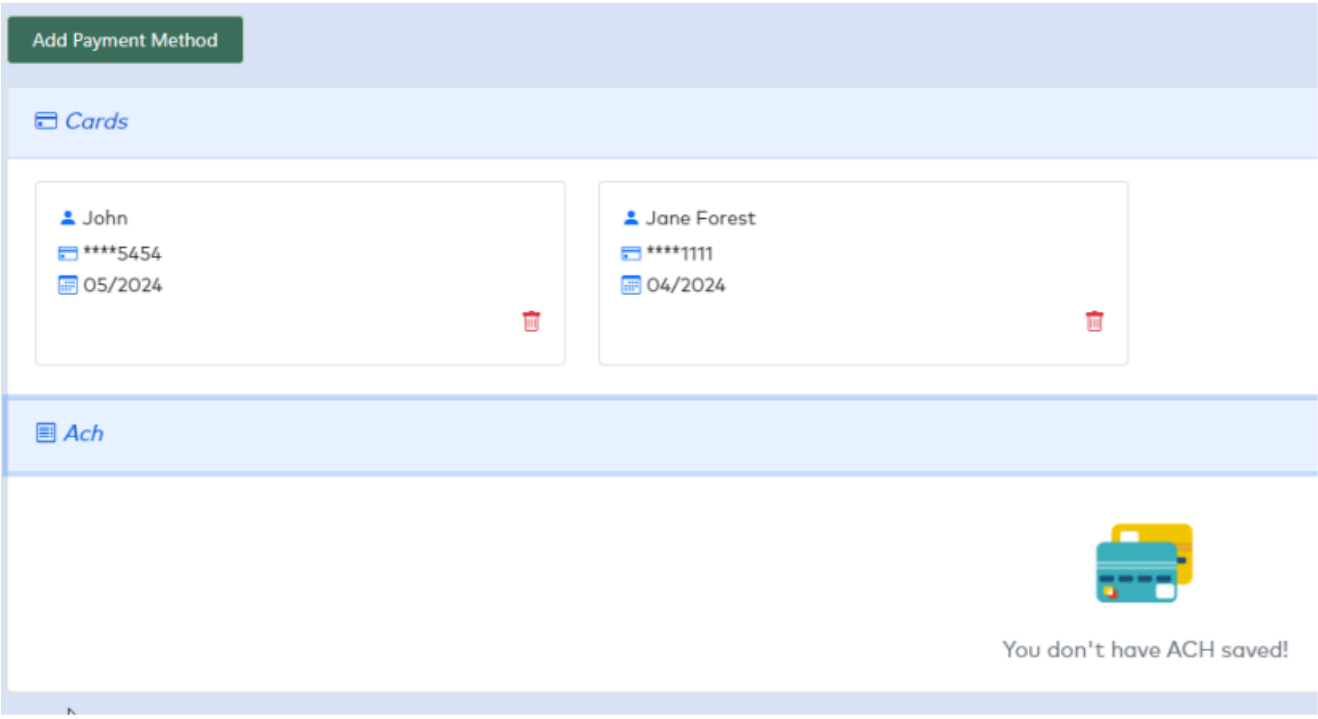
Address

The address screen shows all addresses saved to your account.
You can review, edit, and remove CreditCard (Billing) and Invoice (Shipping) addresses.

Name	Address 1	Address 2	City	State	Zip	Country
Type: CreditCard						
This name	asd		city	SD - South Dakota	1234	
dasd	dasd	dasd	ad	MD - Maryland	222	
fdfs	fsdf	fds	fsdf	FP - Freeport	1111	
VelocIT	330 Diagonal Ave		Clarkston	WA - Washington	99403	United States
Type: Invoice						
This name	asd		city	QC - Quebec	12345	
dasd	dasd	dd	asd	1 - Bocas del Toro Province	123d	
VelocIT	330 Diagonal Ave		Clarkston	WA - Washington	99403	United States

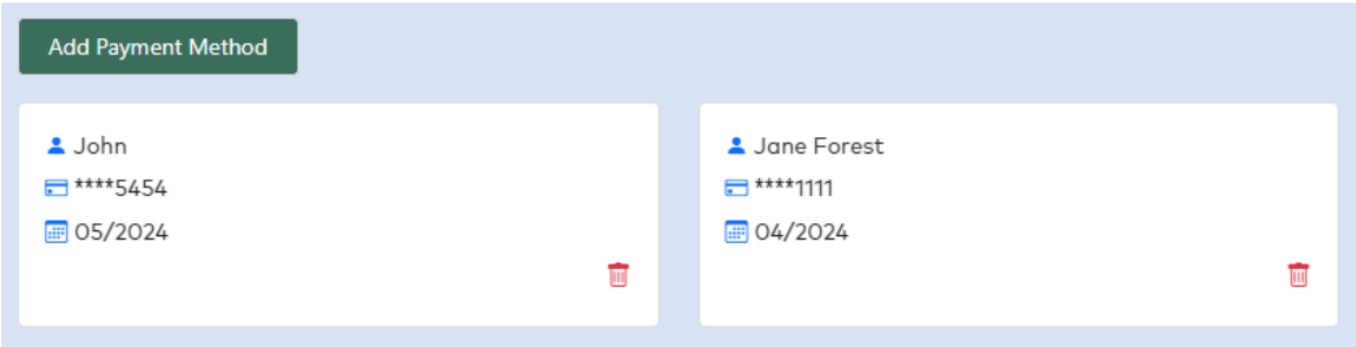
Stored Payment Types

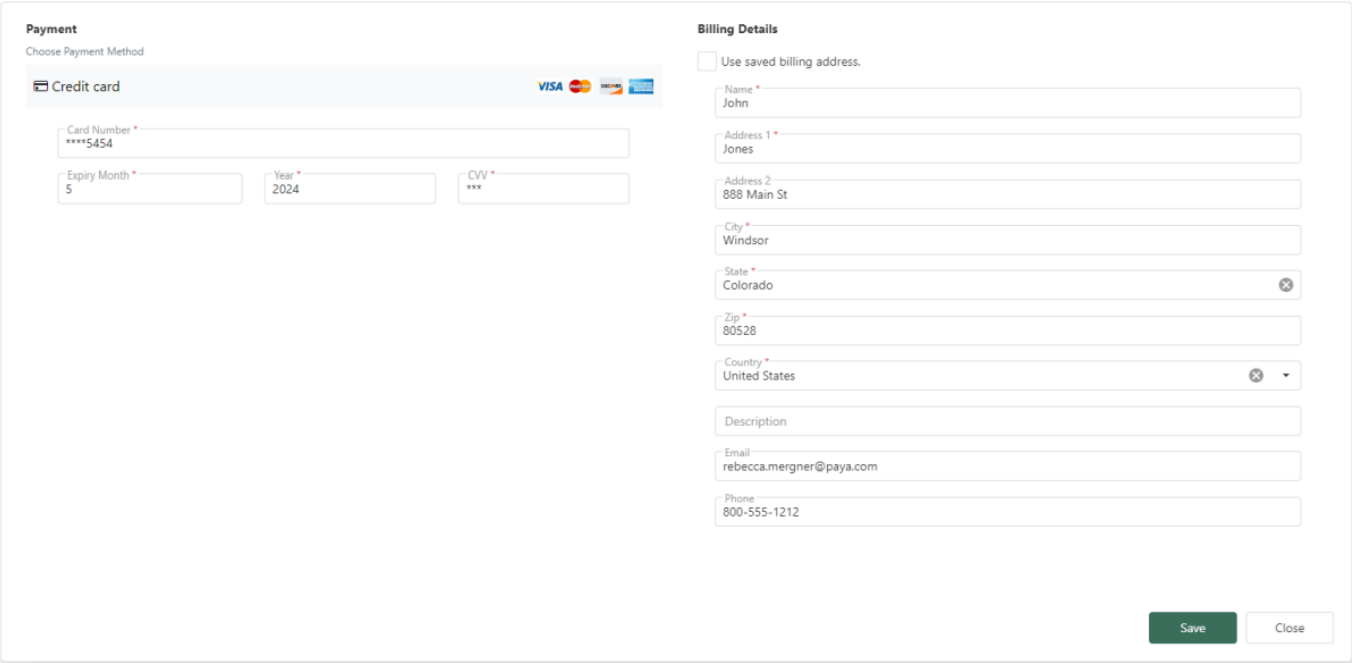
The stored payments screen allows you to add a new payment method by clicking the “Add Payment Method” button. Both Credit Cards and ACH accounts can be added on this screen.



Saved Cards

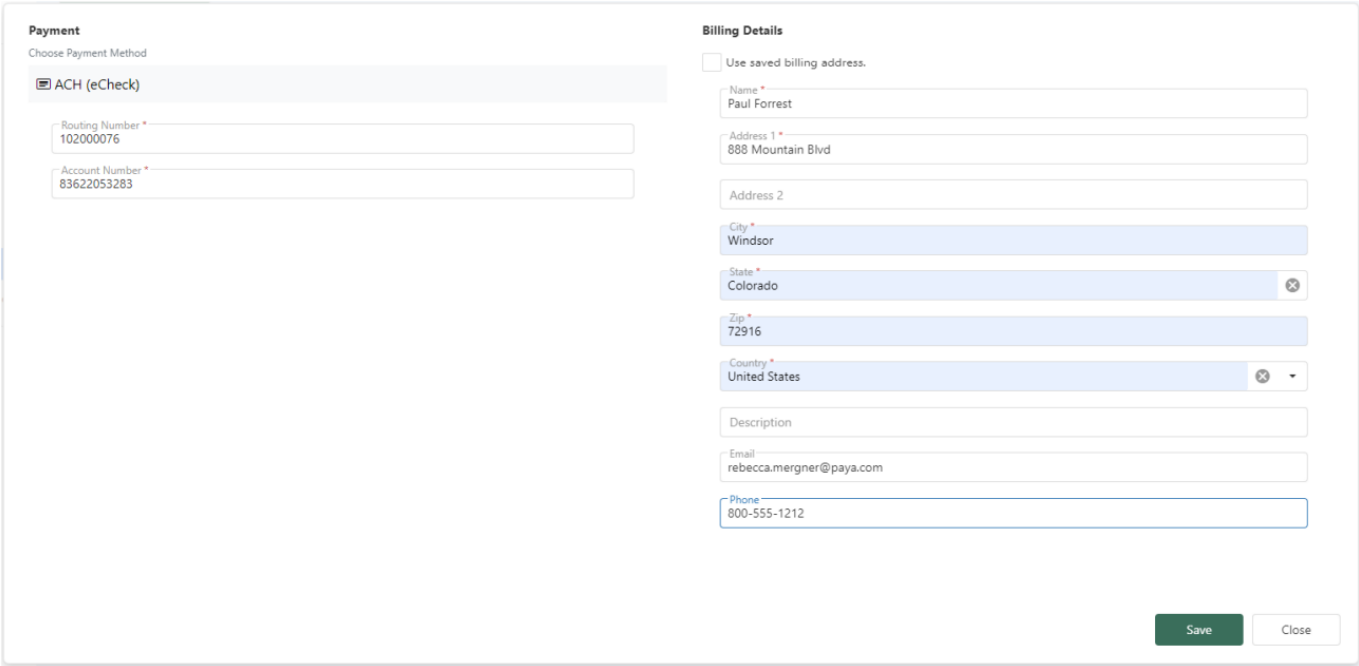
The saved cards screen allows you to save a card to your account by clicking the “Add Payment Method” button. Only Credit Cards can be added on this screen.



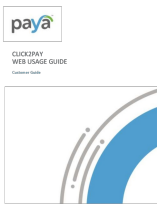


Saved ACH

The stored payments screen allows you save ACH account details by clicking the “Add Payment Method” button. Only ACH accounts can be added on this screen.



Documents / Resources

	[paya CLICK2PAY Web Usage](#) [pdf] Instructions CLICK2PAY Web Usage, CLICK2PAY, Web Usage

Manuals+.