

DP/Payment Portal

(Part #475)

This payment system feature provides **Data Pro Infinity POWER** customers (**Merchants**) with the ability to include an on-line payment option for their customers to pay their **Invoices** and **Statements** with either **Credit Cards** and/or **ACH Payments** with a simple click of a link at the bottom of either form.

Using Data Pro's latest **API** technology, this encrypted link will automatically link the customer directly to their account, in real time, and present them with a current look at the "**open items**" currently due for payment. The system will list the open items and allow the customer to click a box next to each of the open items they want to pay and it will automatically calculate the total amount due to pay.

Based on the **Infinity POWER** customer's decision on which payment methods to offer (**Credit Cards, ACH bank check payments, or both**) the customer can choose the method they would like to use. Once the customer chooses their desired payment method, they will be presented with the necessary fields for payment.

Once that information is entered and submitted, if authorized and successful, the customer will be presented with a receipt on the screen that can be printed and the merchant will receive an email notification of the successful payment authorization. The payment will be posted immediately to the customer's account within the Merchant's accounting system and no other steps are required by their staff.

REQUIREMENTS:

Version 7.6, or higher, of the **Infinity POWER Advanced Accounting Software** is required for this feature to be deployed. Further, the customer must have an installed copy of the **DP/DashBoard/CRM Enterprise Management System (Part #440)**. Lastly, a copy of the **DP/Charge Advanced Payment Server (Part #: 292)** must be installed with a **Merchant ID** from **Payment Innovators**. If you do not have a **Payment Innovators Merchant ID**, please:

(CALL Glenn Witt at 800-310-3880) or email to: glenn@pipay.io

Optionally, the **DP/AUTO Event Triggering System (Part #450)** with the optional scripts (**Part #5560 & 5565**) for emailing **Invoices** and emailing **Statements** can be included with this integration.

IT SUPPORT:

If you are on a Data Pro Cloud Server (**DPROCloud**), we will automatically manage the IT requirements necessary to configure the setup of this technology.

However, if you are hosting Data Pro **Infinity POWER** products on your own network environment, then you will need to arrange to have your own internal IT staff, or IT company, available as it will be necessary to implement the proper security and routing from the Internet.

PRICING:

The cost for the actual **DP/Payment Portal (Part #475)** software technology is included in the price of **DP/DashBoard/CRM**. It requires two (2) hours of Data Pro Technical Support Time for implementation, if **DP/DashBoard/CRM (Part #440)** and **DP/Charge (Part #292)** are already implemented.

The following screen shots illustrate some of the ways that you can generate statements and invoices using the **DP/DashBoard/CRM** module with the **DP/Payment Portal** integration links embedded and how the payment options will appear throughout the process.

Keep in mind, that offering **ACH Payments** is a Merchant decision and option. Not every Merchant is going to make that option available to their customers. This is where you would allow your customers to enter their **Bank Account #** and **Routing #** for payment of their invoices. If your firm only offers Credit Cards, that is no problem. It is just a **Master Configuration** setting in the **DP/Payment Portal** configuration to turn the question on or off. Data Pro handles all the administration of this Master Configuration.

Let us start by performing a **“Customer Inquiry”** in **DP/DashBoard/CRM** by clicking on the **“Customer Aging”** option. The following screen will show a summary of what the customer currently owes at this time and what open invoices still need to be paid:

Total Balance	Current	31-60 Day	61-90 Day	91-120 Day	Over 120
\$673.45	\$591.01	\$0.00	\$82.44	\$0.00	

Date	Type	Trans #	Description	Amount	Due Date
12/14/21	1	18015	Order #: 266747	\$82.44	01/13/22
01/28/22	1	18046	Order #: 267971	\$156.69	02/27/22
01/28/22	1	18047	Order #: 268149	\$156.69	02/27/22
01/28/22	1	18048	Order #: 267989	\$156.69	02/27/22
01/31/22	1	18049	Order #: 270210	\$120.94	03/02/22

By clicking on the **“Printable Statement”** button underneath the summary, a **PDF** version of the statement can be printed and/or emailed to the customer. A sample of the statement is shown on the following page.

Notice in the red circle that the last portion of the link has been greyed out. This is the encrypted portion of the link. For security purposes, this is not shown here.

When the customer receives this **PDF** via email, this is a link that they can simply click on, which will then lead them to a page where they can pay their bills on-line securely.

POPSTOPS

PopStops Marketing, Inc.
111 Second Avenue Northeast
Suite 1201
St. Petersburg FL 33701 US Phone: (800) 209-4571

STATEMENT
Date: 02/15/2022

Account: SHELBY Page: 1

BILL TO			REMIT TO		
Shelby American, Inc. 6405 Ensworth Street Las Vegas NV 89119 US			PopStops Marketing, Inc. 111 Second Avenue Northeast Suite 1201 St. Petersburg FL 33701 US		

Date	Type	Trans #	Description	Due Date	Amount	
12/14/2021	Inv	18015	Order #: 266747 (PO #: 50567)	01/13/2022	\$82.44	
01/28/2022	Inv	18046	Order #: 267971 (PO #: 50835)	02/27/2022	\$156.69	
01/28/2022	Inv	18047	Order #: 268149 (PO #: 50874)	02/27/2022	\$156.69	
01/28/2022	Inv	18048	Order #: 267989 (PO #: 50840)	02/27/2022	\$156.69	
01/31/2022	Inv	18049	Order #: 270210 (PO #: 51229)	03/02/2022	\$120.94	
<hr/>						
Total Balance		Current	31-60 Day	61-90 Day	91-120 Day	Over 120
\$673.45		\$591.01	\$0.00	\$82.44	\$0.00	\$0.00

Click the link below to Pay On-Line

<https://pay.dataproaccountingssoftware.com/modules/pay/?>

This on-line link is configured by Data Pro and allows us to include your company logo on your statements and much more.

Dashboard > Settings > Users > Edit User

<< Back to users

Edit User

Logo	<input type="button" value="Browse..."/> No file selected.
First Name	<input type="text" value="Matt"/>
Last Name	<input type="text" value="Stutsman"/>
Username	<input type="text" value="popstops"/>
Password	<input type="password"/> (leave blank to keep current password)

This master configuration setup also allows us to define your email server settings, your company information, address information, phone number, company slogans, web site addresses and more.

SMTP From Email	<input type="text" value="sales@popstops.com"/>
SMTP Username	<input type="text"/>
SMTP Password	<input type="password"/>
SMTP Port	<input type="text" value="2525"/>
SMTP Use SSL	<input type="text" value="No"/>
Company Name	<input type="text" value="Popstops Marketing, Inc"/>
Company Slogan	<input type="text" value="Stop Your Car. Display \"/>
Phone Number	<input type="text" value="800-209-4571"/>
Contact Email	<input type="text" value="mstutsman@popstops.c"/>
Website	<input type="text" value="www.popstops.com"/>
Address	<input type="text" value="111 2nd Avenue Northe"/>


Whether you accept **ACH Payments** is literally a simple **Yes/No** answer:

Accept ACH Payments	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="button" value="Save Changes"/>	

When your customer clicks the secure encrypted link, they are calling the **Data Pro API** to access their account within your **Accounts Receivable Open Item** data files. Every time they click this link, it will make

a new call to your files and only display back to them the “open items” that are currently not paid in your system. If they made a payment an hour ago, those items will not show up the next time they click this link.

The system will display a payment page like the following page with all outstanding items to be paid:



Statement

Please enter your payment information below.

Stop Your Car. Display Your Message.

Bill To Shelby American, Inc. 6405 Ensworth Street Las Vegas, NV 89119	Remit To Popstops Marketing, Inc. 111 2nd Avenue Northeast Suite 1201 St. Petersburg, FL 33701-3443 sfenimore@popstops.com www.popstops.com
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Pay	Due	Invoice	Amount
<input type="checkbox"/>	01/13/22	Invoice #18015 Order #: 266747.	\$82.44
<input type="checkbox"/>	02/27/22	Invoice #18046 Order #: 267971.	\$156.69
<input type="checkbox"/>	02/27/22	Invoice #18047 Order #: 268149.	\$156.69
<input type="checkbox"/>	02/27/22	Invoice #18048 Order #: 267989.	\$156.69
<input type="checkbox"/>	03/02/22	Invoice #18049 Order #: 270210.	\$120.94
Total			\$0.00

The current **“Total”** will automatically default to zero until they click on at least one of the boxes on the left next to one of the open items that are available to be paid. When they do, that amount will be added to the running total at the bottom right of the screen.

Pay	Due	Invoice	Amount
<input checked="" type="checkbox"/>	01/13/22	Invoice #18015 Order #: 266747.	\$82.44
<input checked="" type="checkbox"/>	02/27/22	Invoice #18046 Order #: 267971.	\$156.69
<input type="checkbox"/>	02/27/22	Invoice #18047 Order #: 268149.	\$156.69
<input type="checkbox"/>	02/27/22	Invoice #18048 Order #: 267989.	\$156.69
<input type="checkbox"/>	03/02/22	Invoice #18049 Order #: 270210.	\$120.94
Total			\$239.13

In this example, if they clicked on the top two items above, the **“Total”** increased to **\$239.13**. The items they click do NOT have to be in sequence. They can choose whatever items they desire. No credit or debit memos will appear on this listing. That is an internal accounting department/management decision to determine how to allocate those kinds of transaction types, not a customer decision.

Once the customer has chosen the open items that they want to pay, they would simply scroll down on the same screen to the payment section. This is shown in sections due to space.

The default payment choice is **“Credit Cards”** as shown on the following screen:

Pay	Due	Invoice	Amount
<input checked="" type="checkbox"/>	01/13/22	Invoice #18015 Order #: 266747.	\$82.44
<input checked="" type="checkbox"/>	02/27/22	Invoice #18046 Order #: 267971.	\$156.69
<input type="checkbox"/>	02/27/22	Invoice #18047 Order #: 268149.	\$156.69
<input type="checkbox"/>	02/27/22	Invoice #18048 Order #: 267989.	\$156.69
<input type="checkbox"/>	03/02/22	Invoice #18049 Order #: 270210.	\$120.94
Total			\$239.13

Payment Details

I want to pay via

Credit Card

ACH Payment

Email Receipt to:

invoices@shelby.com

Name on Card:

Card Numbers:

Expiration:

MM

/ YY

Security Code:

Make Payment

The default “**Email Receipt to**” address is pulled from the customer’s master file. This can be overwritten during the time of each payment, if the person needs to redirect it to another email address.

The next fields are the standard credit card number fields, expiration date and the three/four-digit security code. Once this information is entered, the customer will simply click on **“Make Payment.”** If the payment is approved, it will generate a payment receipt on the screen immediately. This receipt has a **“Print”** option available. If not, it will display a message to the contrary. If successful, it will also generate an email to the email address that is defined in the Merchant’s Master Configuration, where email notifications are to be sent.

That way you know when you have been sent payments right away!

If you have made **ACH Payments** available as an option, and the customer selects this option for payments, then the following fields will be displayed:

The screenshot shows a form titled "Payment Details". At the top, it says "I want to pay via" with two radio button options: "Credit Card" (unselected) and "ACH Payment" (selected). Below this are four input fields: "Email Receipt to:" with the value "invoices@shelby.com"; "Checking or Savings:" with a dropdown menu showing "Checking" selected; "Routing Number:" with an empty field; and "Account Number:" with an empty field. At the bottom of the form is a blue button labeled "Make Payment".


As with Credit Cards, the **“Email Receipt to”** will default to the email address on file for the customer’s account. They can override it during the process of posting payments. Next, they must choose whether the bank account information is for a **“Checking Account”** or a **“Savings Account.”**

Next, they will enter that account’s **“Routing Number”** and then the **“Account Number.”** Then, they will click the **“Make Payment”** button. If the payment is approved, it will say so and email both the customer’s email address that is entered into that field and to the email address that is defined in the Merchant’s Master Configuration where email notifications are to be sent.

That way you know when you have been sent payments right away!

Let us look at the following example and follow the entire payment flow.

Whether the **invoice** or **statement** is sent manually from **DP/DashBoard/CRM** or automatically generated from **DP/AUTO** using either the automatic generation or **Invoices** or **statements**, the net result is that the customer ends up with a document, with a link, that they can pay from in their email. It contains an encrypted link at the bottom of the form, like the example below:



PopStops Marketing, Inc.
111 Second Avenue Northeast
Suite 1201
St. Petersburg, FL 33701 US Phone: (800) 209-4571

INVOICE

DATE	INVOICE NO.
02/16/22	18058
ACCOUNT NO.	SALESMAN NO.
8139953119	HOUSE

B Garage King
I 8116 Natures Way
L Suite 32
L Lakewood Ranch, Florida 34202 US
T
O Jean Sarah Kooy (813) 995-3119

S Garage King
H 8116 Natures Way
I Suite 32
P Lakewood Ranch, Florida 34202 US
T
O jsf@skfventures.com

DESCRIPTION	INVOICE DATE	CUSTOMER P.O. NO.	ORDER NO.	SHIPPING INSTRUCTIONS
Invoice	02/16/22	48923	17705	FedEx Ground

QTY	U / M	PART #	DESCRIPTION	UNIT PRICE	DISC %	EXTENSION
1.00	Set	810000511341	12" Goodyear Racing TEAM ONLY (98) Blue in White Circle PopStops 12" Garage Stop Combo B: 12" Goodyear Racing COMBO SET F: TEAM ONLY (98) Blue in White Circle	\$149.90	0.000	\$149.90

REMIT PAYMENT TO:	TERMS: Net 30 Days	SALE AMOUNT	\$149.90
PopStops Marketing, Inc. 111 Second Avenue Northeast Suite 1201 St. Petersburg, FL 33701 US ALL FUNDS PAYABLE IN U.S. DOLLARS		DISCOUNT 40%	-\$59.96
		TAX	\$0.00
		FREIGHT	\$0.00
		SUBTOTAL	\$89.94
		DEPOSIT	\$0.00
		TOTAL DUE	\$89.94

Click the link below to Pay On-Line

<https://pay.dataproaccountingsoftware.com/modules/pay/?>

Therefore, when the customer clicks the link, it will retrieve from your accounting system (**Accounts Receivable Open Item file**) those pending Open Items just for them. In this case, the screen appears like the following:

The screenshot shows a web interface for Popstops. At the top is the Popstops logo. Below it is the heading "Statement" followed by the instruction "Please enter your payment information below." and the slogan "Stop Your Car. Display Your Message." The form is divided into two main sections: "Bill To" and "Remit To".

Bill To:
Garage King
8116 Natures Way
Suite 32
Lakewood Ranch, Florida
34202

Remit To:
Popstops Marketing, Inc.
111 2nd Avenue Northeast
Suite 1201
St. Petersburg, FL 33701-3443
mstutsman@popstops.com
www.popstops.com

Below this is a table with the following data:

Pay	Due	Invoice	Amount
<input checked="" type="checkbox"/>	03/18/22	Invoice #18058 Invoice.	\$89.94
Total			\$89.94

The second section is "Payment Details" with the instruction "I want to pay via". There are two radio buttons: "Credit Card" (selected) and "ACH Payment". Below are several input fields: "Email Receipt to:" with the value "jsf@skfventures.com"; "Name on Card:"; "Card Numbers:"; "Expiration:" with MM and YY dropdowns; and "Security Code:". A blue "Make Payment" button is at the bottom. At the very bottom of the page is the copyright notice: "© Copyright 2022 Data Pro Accounting Software, Inc. All rights reserved."

Next, the customer enters their payment information (*i.e. credit card*) in this example.

Payment Details

I want to pay via

Credit Card ACH Payment

Email Receipt to:

Name on Card:

Card Numbers:


Expiration: /

Security Code:

Make Payment

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The user clicks on **“Make Payment”** to process the transaction. If the transaction is approved, the receipt is generated to the screen immediately with the option for the user to click on the **“Print”** button to get a receipt right then.



Thank You!

Your payment has been processed.

Stop Your Car. Display Your Message.

Bill To Garage King 8116 Natures Way Suite 32 Lakewood Ranch, Florida 34202	Remit To Popstops Marketing, Inc. 111 2nd Avenue Northeast Suite 1201 St. Petersburg, FL 33701-3443 mstulsmen@popstops.com www.popstops.com
--	--

Invoice Date	Description	Amount
02/16/22	Invoice #18058	\$89.94
Total		\$89.94

Payment Authorization #03137
 Paid 02/16/22

PRINT

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Additionally, an email copy of the receipt is sent to the address that was specified during the “**Payment Details**” portion of the transaction. That could have been the “**default**” email address of the customer account or the “**temporary**” email address the customer may have typed in for this particular transaction.

Popstops Marketing, Inc. <sales@popstops.com> | jsf ventures
Payment Complete - Thank you!
 ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

Thank You!

Your payment has been processed.

Stop Your Car. Display Your Message.

Bill To Garage King 8116 Natures Way Suite 32 Lakewood Ranch, Florida 34202	Remit To Popstops Marketing, Inc. 111 2nd Avenue Northeast Suite 1201 St. Petersburg, FL mstutsman@popstops.com www.popstops.com
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Invoice Date	Description	Amount
02/16/22	Invoice #18058	\$89.94
Total		\$89.94

Payment Authorization #03137
Paid 02/16/22

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In the meantime, an email has been sent to you, as the **Merchant**, to notify you that a payment has been made on your on-line portal. It is a copy of the payment receipt the customer has just seen above.

From: Popstops Marketing, Inc. <sales@popstops.com>
Sent: Wednesday, February 16, 2022 9:29 AM
To: Matt Stutsman <mstutsman@popstops.com>
Subject: Payment Complete - Thank you!

Thank You!

Your payment has been processed.

Stop Your Car. Display Your Message.

Bill To Garage King 8116 Natures Way Suite 32 Lakewood Ranch, Florida 34202	Remit To Popstops Marketing, Inc. 111 2nd Avenue Northeast Suite 1201 St. Petersburg, FL mstutsman@popstops.com www.popstops.com
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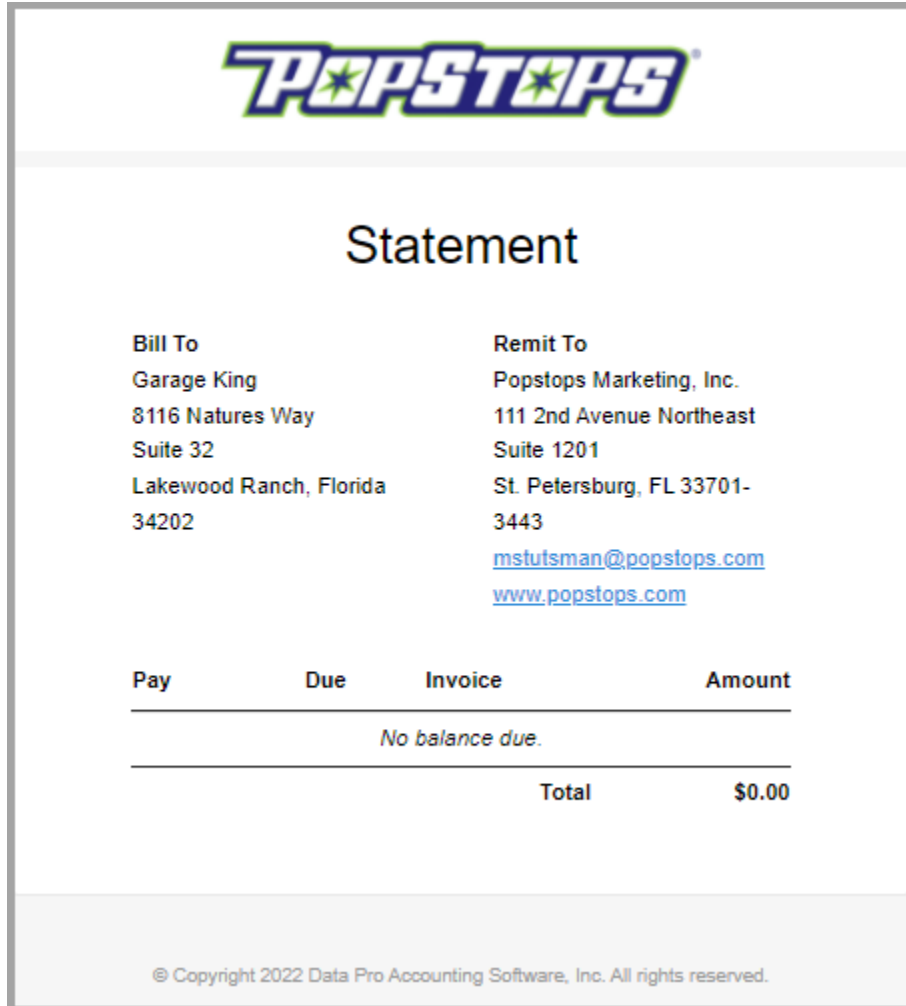
Invoice Date	Description	Amount
02/16/22	Invoice #18058	\$89.94
Total		\$89.94

Payment Authorization #03137
Paid 02/16/22

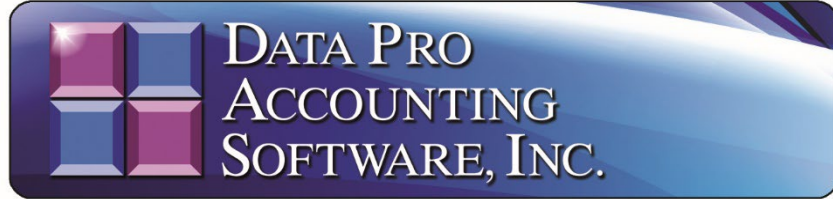
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Just to verify, if the client turned around and clicked on the very same link on their invoice or statement again, the **API** would once again search your current list of open items and only display what is currently available.

In this example, this is what would be shown:



If the customer were using **ACH** as the payment method, it would work the same way, but instead they would be prompted for their banking information.



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