

## Customer Payments Portal Setup and Processes

<b>Document #:</b>	3450	<b>Product:</b>	CenterPoint® Accounting
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The Customer Payments Portal allows you to accept credit card or e-check (ACH) payments online from your customers. Red Wing Software joined forces with Clover Connect, a premier integrated payments solution provider, to offer seamless payment processing within CenterPoint Accounting. The Customer Payments Portal works with the invoice emailing feature in CenterPoint. When customers receive their invoice or statement, the email will contain a link to a unique Invoices Due web page where they can pay outstanding invoices online. Those payments are then imported into CenterPoint as receipts applied to the invoices.

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## Step 1: Set Up the Customer Payments Portal

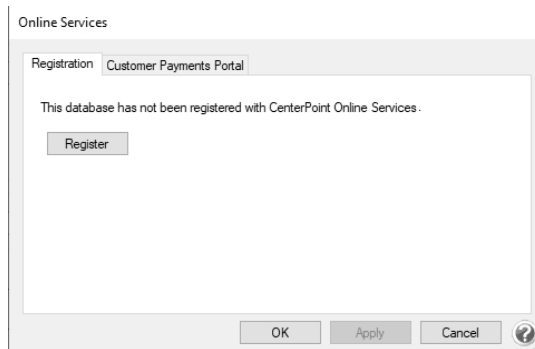
**Prerequisite:** To use the Customer Payments portal, you must have an account with Clover Connect for credit card or e-check (ACH) processing. If you have not done so already, contact the Red Wing Software Sales department to connect with Clover Connect and activate the Customer Payments Portal.

### Add the Customer Payments Portal

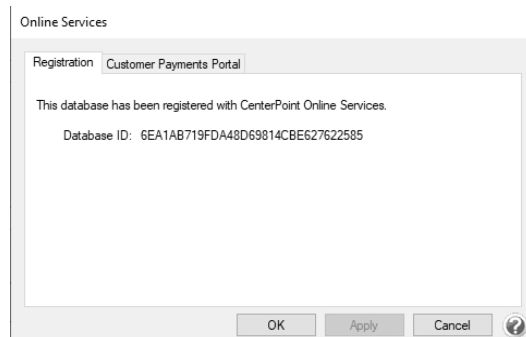
1. If CenterPoint is not open, start CenterPoint by double-clicking your **CenterPoint** icon on your desktop.
2. Select **File > Administration > Module Configuration Manager**.
3. Select **Online Services**, select **Customer Payments Portal**, and then click **OK** twice.
4. Close CenterPoint, double-click the **CenterPoint** icon on your desktop to restart it, and then open your database.

### Register the Customer Payments Portal

1. In CenterPoint, select **Setup > Online Services**.




2. Click **Register**.



3. After registration is complete, select the **Customer Payments Portal** tab.

4. In the **Merchants Name** box, enter the name that you want your customers to see in the Customer Payments Portal.
5. Enter your **Contact Email** and **Contact Phone** that you want displayed in the Customer Payments Portal.
6. If you want your logo to display in the Customer Payments Portal, click the **Upload** button, select the logo file (the file must be between 0 and 150 kb and can be any image file format, for example .jpg, .bmp, .png, etc.), and then click **Open**. To preview the logo, click **Preview** and to remove the logo, click **Remove**.
7. Select the **Bank Account** and **Discounts Account** to use when importing customer payments from the Customer Payments Portal into CenterPoint as receipts. Enter your **Merchant ID (MID)**, **API Username**, and **API Password** credentials provided to you by Clover Connect for processing credit card payments. Click **Validate** to verify the credentials are accurate.
8. Click **Generate Test Transaction**. This process generates a test invoice for \$1.00, which can be paid through the Customer Payments Portal to test the Clover Connect merchant configuration. The test transaction will not update CenterPoint Accounting.
9. Click **OK** to pay the test transaction through the Customer Payments Portal.



**Amount Due**

**\$1.00**

[Pay](#)

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**Alpine Sports**

Customer	Test Customer
Invoice #	TEST-123
Due Date	August 10, 2023
Amount	\$1.00


**Contact Details**

Email: [contact@alpinesports.com](mailto:contact@alpinesports.com)

Phone: (651) 388-1106

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10. Click **Pay**, select the method of payment: **Credit Card Information** or **E-Check Information** (this payment option is available only if the Merchant ID is configured with Clover Connect to accept e-check (ACH) payments), enter your credit card or bank account information, and then click **Submit**.



☒ \$1.00 (Amount Due)

☐ Other Amount

☒ **Credit Card Information**

Card Number

Name on Card

Expiration Date  /  2023

Security Code


Zip Code

[Submit](#)

☐ E-Check Information

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11. If the test payment is approved, a receipt will display for your records.



**Alpine Sports**

Confirmation Code:	TEST-PAYMENT
Date:	August 10, 2023
Time:	09:45 AM (CST)
Amount:	\$1.00

**Thank you for your payment.**

Please keep a copy of this receipt for your records.

**Contact Details**

Email: [contact@alpinesports.com](mailto:contact@alpinesports.com)

Phone: (651) 388-1106

Reference ID: 222860538726. [Print](#)

12. Switch to the CardPointe portal to verify the \$1.00 payment and void the transaction to void/refund the \$1.00. If you have questions on CardPointe functions, contact Clover Connect.
13. You can generate a test transaction as often as necessary.

## Set Up Emailing of Invoices

Only customers who are configured to receive invoices via email will be included in the Customer Payments Portal. If you email statements, customers who receive emailed invoices will also have a link to pay online included with their billing statement email. For full instructions on how to email customer invoices, please see the [Emailing Customer Invoices](#) topic. If you are already sending customers invoices via email, continue to Step 2.

### 1. Setup Email Preferences

- Select **File > Preferences**.
- On the left, select **Email Setup > Email Setup**, and then select the **Database** tab at the top.
- Enter the required information.
- On the left, select **Customer Invoices**.
- Enter a default **Subject** and **Message** and select the **Form** for emailing invoices.
- Optional: Select **Billing Statements** to enter defaults for emailed statements.
- Click **Save**.

### 2. Set Up Customers to Receive Invoices by Email

- Select **Setup > Names** or **Setup > Customers**
- Edit** the appropriate customer.
- Click the **Email/Print** tab.
- Enter the **Name** and **Email Address(es)** that will receive invoices emailed to this customer.
- Select **Send "To"**, **Send "CC"**, or **Send "BCC"** for Invoices for each email address.
- Optional: Set the email options for Statements if you would also like this customer to receive emailed billing statements. If they receive emailed invoices, the statements will also contain the link to pay online.
- Click **Save**.
- Repeat for each customer who will receive emailed invoices.

### 3. Set Up Sent from Email



Note: If this step is not completed, the email address used for Test Settings in the Email preference will be used as the From email address.

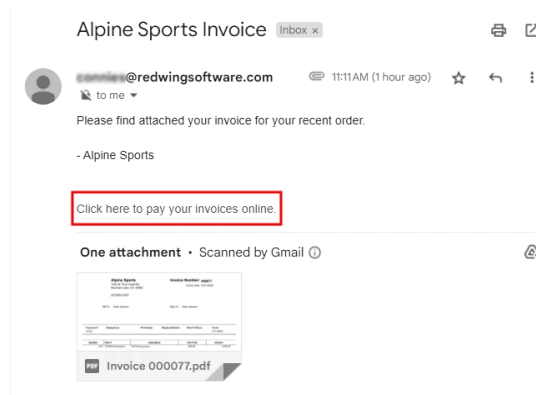
- Select **Setup > General Email Addresses**.
- Enter the **Name** and **Email Address** and select how **Customer Invoices** and **Print Checks/Invoices** should be sent.
- Click **Save**.

## Step 2: Enter Customer Invoices and Send Via Email

When you enter an invoice for a customer set to email invoices, the Email button at the bottom of the invoice screen will show a green check mark to indicate that when the invoice is saved, the customer will receive the invoice via email.



The customer will receive an email that contains a link to pay their invoices online.



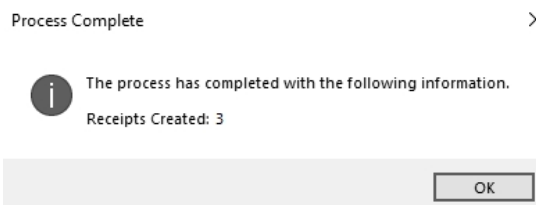
### Step 3: Get Customer Receipts from the Customer Payments Portal

Credit card payments your customers make online can be brought directly into CenterPoint as receipts applied to their invoices.

1. Select **Processes > Customer Payments Portal > Get Customer Receipts**.

Payment Date	Customer	Amount	Confirmation Code	Reference Id
08/02/23	Andy Johnson	\$ 388.70	3887E6460B	214163536875

2. In the **Next Receipt Number** box, the next sequence number for receipts will display or enter the next Receipt Number to use when generating receipts.
3. The available online payments for the registered database will display. Click **Import** to generate receipts for all available online payments.
4. At the *This will generate receipts for all available online payments, continue?* message, click **Yes**.
5. When the process completes successfully, the following screen displays.



6. Click **OK**.

## Manage the Customer Payments Portal in CenterPoint

### Customer Open Invoices

The Customer Open Invoices option allows you to review the status of open customer invoices on the Customer Payments Portal and post any invoices that are not currently online. It also has an option to launch the Customer Payments Portal for a specific customer.

1. Select **Processes > Customer Payments Portal > Customer Open Invoices**.

Upload	Invoice Date	Number	Customer	Amount	Amount Remaining	Status
<input type="checkbox"/>	11/30/22	000074	Andy Johnson	\$ 544.35	\$ 544.35	Online
<input type="checkbox"/>	07/01/22	000009	Andy Johnson	\$ 544.35	\$ 244.35	Online
<input type="checkbox"/>	04/01/22	000009	Andy Johnson	\$ 544.35	\$ 144.35	Online

2. If you want to filter the list, select the **Customer** to filter by.
3. Invoices from the Customer Payments Portal will display in invoice date descending order. The **Status** of the invoices can be one of the following:
  - » **Offline**: The invoice is not on the Customer Payments Portal.
  - » **Not Synched**: The invoice is on the Customer Payments Portal, but the Amount Due doesn't match with CenterPoint.
  - » **Online**: The invoice is on the Customer Payments Portal with no Amount Paid or Discount Applied and the Amount Due is the full amount remaining.
  - » **Payment**: The invoice is on the Customer Payments Portal with a partial payment applied.
  - » **Paid**: The invoice is paid in full on the Customer Payments Portal. The invoice has not been imported into CenterPoint.
4. If an invoice has a status of Offline or Not Synched, select the **Upload** check box and then click the **Upload** button to upload the invoice to the Customer Payments Portal (invoices can only be uploaded if the customer is configured to receive emails for customer invoices).
5. Right-click and select **Refresh** to update the screen with changes made on the Customer Payments Portal.
6. To view the online Customer Payments Portal for a specific customer, right-click on an invoice for the customer and select **View Customer Invoices Online for "Customer Name"**.

## View Receipts from the Customer Payments Portal in Transaction Search

The receipts will come into CenterPoint as "Receipt" transactions, just as if they were entered into CenterPoint directly. They are visible in Transaction Search and on any reports where you would normally review receipts. In addition, receipts from the Customer Payments Portal have a Payment Type of Customer Payments Portal, and Memo Line 1 will contain a CPP label followed by the Confirmation Code/Reference Id of the online payment.

To easily find all Customer Payment Portal Receipts:

1. Select **Reporting Tools > Transaction Search**.
2. On the left side of the screen, click **More Items** and select **Payment Type**.
3. In the **Payment Type** box, select **Customer Payments Portal**.
4. Enter any other search selections, such as Customer or Date.
5. Click **Search**.

Filters | Columns | Group/Sort | General

Date Selection: This Month | From: 08/01/2023 | To: 08/31/2023 | Search

Format Definition: Summary | Filter Definition: Summary

Transaction Date	Transaction Number	Entry Screen	First Name, Last Name	Total Bank Amount
8/2/2023	000058	Receipts	Andy Johnson	388.70
				388.70

Search Criteria: Company: Alpine Sports, Current Batch: Quick Transaction, Current Balance: \$2,090,409.49

Bank Account: Cash in Bank - Checking | Bank Deposit

Received From: Johnson, Andy | Receipt / Invoice #: 000058 | Date: 08/02/2023 | Amount: \$388.70

Received From Address: No Address Defined | Payment Type: Customer Payments Portal | Account: 3887E5460B

Apply To Open Invoices: \$544.35 | Check / Ref #: 3887E5460B

Account	Amount
Accounts Receivable - Retail	\$388.70


Memo Line 1: CFP: 3887E5460B / 214153536875 | Total: \$388.70 | Adjust Amount

Buttons: Save, Delete, NSF, Recurring, Options, Close

## Frequently Asked Questions

**Q:** Can I see what my customers will see when they go to the Customer Payments Portal?

**A:** Yes, on the Customer Open Invoices screen, you can right-click on any invoice and choose **View Customer Invoices Online for "Customer Name"** to launch that customer's Customer Payments Portal. This is an example:


  
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**Amount Due**  
**\$933.05**  
[Pay](#)


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**Alpine Sports**  
Customer: Andy Johnson  
Invoices: 3  
Earliest Due: May 1, 2022  
Total Amount: \$933.05  
[View Details](#)

**Contact Details**  
Email: [contact@alpinestarts.com](mailto:contact@alpinestarts.com)  
Phone: (651) 388-1106

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Customers can choose to pay the full amount due, or if they have multiple invoices, click the **View Details** to see the individual invoices. They can unselect any invoices they do not wish to pay at this time and click **Pay** to pay the selected invoices.


  
**ALPINE SPORTS**  
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Date	Number	Amount	Due Date	Amount Due	Discount Date	Available
11-30-2022	000074	\$544.35	12-30-2022	\$544.35		\$0.00
04-01-2022	000009	\$144.35	05-01-2022	\$144.35		\$0.00
07-01-2022	000009	\$244.35	07-31-2022	\$244.35		\$0.00


**Alpine Sports**  
Contact Details  
Email: [contact@alpinestarts.com](mailto:contact@alpinestarts.com)  
Phone: (651) 388-1106

**Amount Due**  
**\$388.70**  
[Pay](#)

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They can choose to pay the amount due or make a partial payment. They will enter their credit card or bank account information (this payment option is available only if the Merchant ID is configured with Clover Connect to accept e-check (ACH) payments), and click **Submit** to make the payment. If their credit card or e-check information is approved, a receipt will display that they can print for their records.



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☒ \$388.70 (Amount Due)


☐ Other Amount

☒ Credit Card Information
 

Card Number   
 Name on Card   
 Expiration Date 01 / 2023  
 Security Code   
 Zip Code

☐ E-Check Information

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ALPINE SPORTS  
PLAYING TO WIN!

Alpine Sports

Confirmation Code: 3887E64608  
 Date: August 2, 2023  
 Time: 09:14 AM (CST)  
 Amount: \$388.70


**Thank you for your payment.**  
 Please keep a copy of this receipt for your records.

**Contact Details**  
 Email: contact@alpinesports.com  
 Phone: (651) 388-1106

Reference ID: 214163536875. [Print](#)

**Q:** My company applies a surcharge to customers paying with a credit card. How are customers informed of the surcharge?

**A:** If your Merchant ID is set up by Clover Connect to apply surcharges, a message will display the surcharge percentage in the Customer Payments Portal and the amount of the surcharge applied will display on the payment screen and receipt.



ALPINE SPORTS  
PLAYING TO WIN!

Amount Due

**\$534.35\***

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**Alpine Sports**

Customer Andy Johnson  
 Invoice # 000075  
 Due Date November 8, 2023  
 Discount Date October 19, 2023  
 Amount \$534.35\*

**Contact Details**  
 Email: customerservice@alpinesports.com  
 Phone:

\*This merchant applies a surcharge fee of up to 3% for credit card payments where applicable.

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☒ **\$534.35 (Amount Due)**

☐ **Other Amount**

☒ **Credit Card Information**

\*This merchant applies a surcharge fee of up to 3% for credit card payments where applicable.  
A 3% surcharge would be \$16.03, for a payment total of \$550.38

Card Number

Name on Card

Expiration Date  /

Security Code

Zip Code

**Alpine Sports**

Confirmation Code:	2DD77DF012
Date:	October 9, 2023
Time:	02:50 PM (CST)
Amount:	\$534.35
Surcharge:	\$16.03
Total:	\$550.38

**Thank you for your payment.**

Please keep a copy of this receipt for your records.

**Contact Details**

Email: customerservice@alpinesports.com  
Phone:

Reference ID: 282799557055.

**Q:** My customer deleted the email. How do I get them a new link to the Customer Payments Portal?

**A:** You can email them a new copy of the invoice from **Processes > Sales > Print/Email Invoices**.

**Q:** What happens if I edit or delete an invoice that is already uploaded to the Customer Payments Portal?

**A:** CenterPoint will sync with the Customer Payments Portal and remove the deleted invoice or update the invoice with the edited information.

**Q:** My customer does not want to pay online, what happens to the invoice on the Customer Payments Portal?

**A:** Your customer can continue to pay the way they have in the past. When the receipt is entered in CenterPoint to pay the invoice, the invoice will no longer be available to pay on the Customer Payments Portal.


**Q:** My customer called to pay with a credit card. Can I process the credit card on the Customer Payment Portal so that the payment can be imported into CenterPoint?

**A:** Yes, from **Processes > Customer Payments Portal > Open Customer Invoices**, right-click on the invoice and select **View Customer Invoices Online for "Customer Name"**. This will bring you to their Customer Payment Portal page where you can select the invoice(s) and make a payment using the credit card information they provide.

**Q:** A customer made a payment and the invoice was not found in CenterPoint. How is this reconciled?

**A:** In the rare occurrence that a payment made on the Customer Payments Portal cannot be matched with an open invoice in CenterPoint (for instance, the payment was made online, and then a receipt was entered in CenterPoint before the online payment was imported) CenterPoint will prompt you that it needs to create a customer deposit for this payment.

Unreconciled Receipts



An invoice was not located in CenterPoint for a payment from the Customer Payments Portal. A deposit will be created for the Customer and the Payment Amount displayed. Please enter the Unreconciled Payments Company and Account (Deposits).

Deposit Amount: \$544.35

Customer: Andy Johnson

Payment Date: Friday August 04, 2023


Payment Amount: \$544.35

Discount Taken: \$0.00


Confirmation Number: 74B61C88A6

Reference Id: 216886431555

Unreconciled Payments Company



Unreconciled Payments Account (Deposits)



Continue

Cancel

