



CLICK2PAY WINDOW SERVICE SETUP



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Requirement for Windows Service Installation / Reinstallation

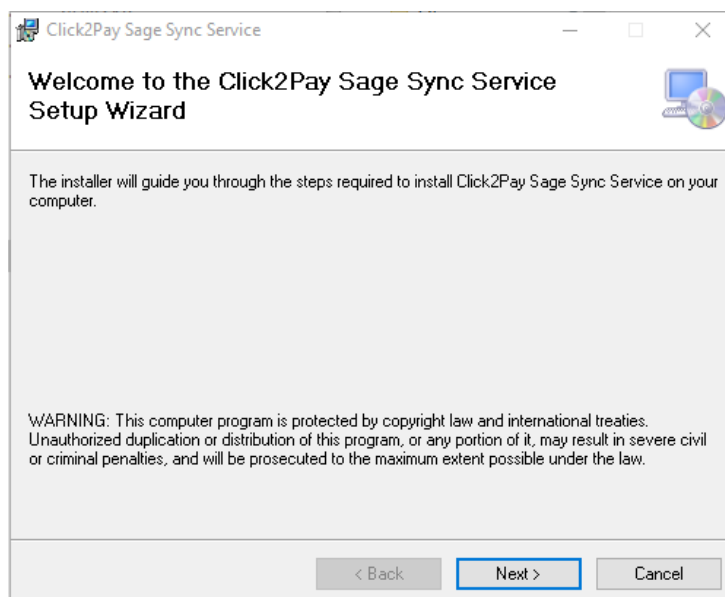
- Installed AFTER the Sage solution AR8003-C2P has been installed to the Sage system and configured
- Must have .NET Framework 4.8 on the Sage server
- Must be installed & configured on the Sage server with the admin login – this login will be utilized to setup the service.
- Create a C:\TEMP directory on the Sage sever – this directory will be the destination for the sync logs generated. Logs are generated each sync and are populated by date. It is recommended these logs be reviewed daily and a Windows script should be created which will purge according to end-user storage needs.

Installation of Windows Service

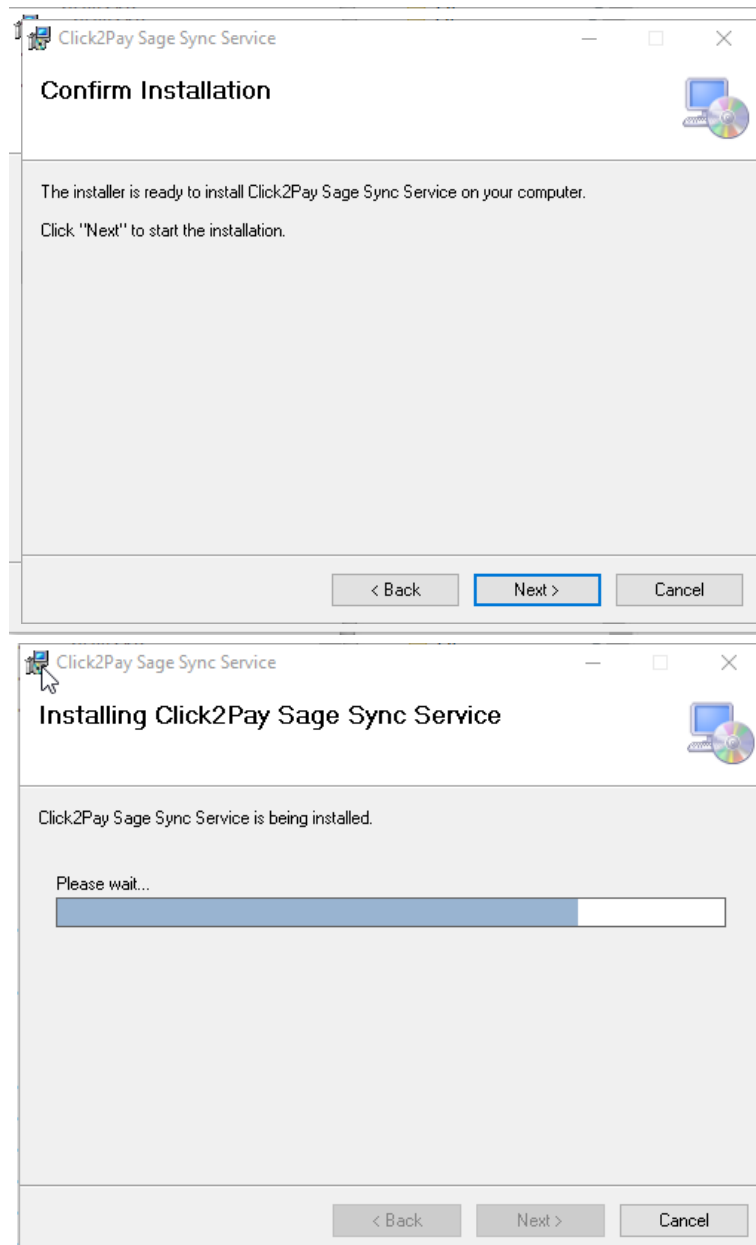
Note if the solution was previously installed to the “Reinstallation/Update” section below

- Provided installation for C2PSageSync file
 - Unzip to find a MSI & Setup.Exe file
 - Use the Setup.EXE file to

Name	Type	C
C2PSageSync	Windows Installer Package	
setup	Application	

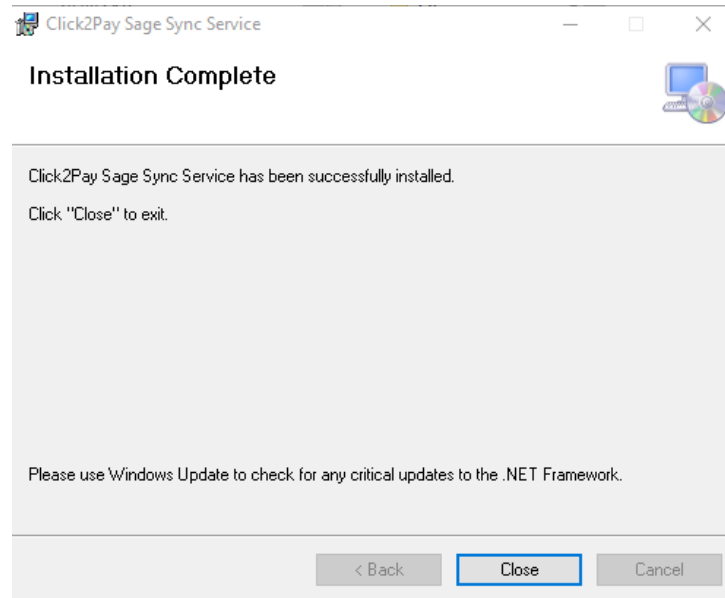


- For the FOLDER request – install to the root of the server



- Service login information. Username is domain\username

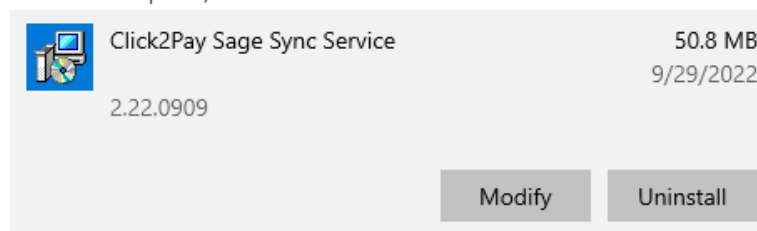




- Setup a C:\TEMP directory which will be utilized to store logs pertaining to the installed Windows Service

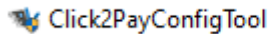
Reinstall / Update Windows Service

- The following procedure is to be utilized when a new version of the C2PSageSync Windows Service is provided
 - Access the system function for APPS & FEATURES – Add and Remove programs
 - The Uninstall will leave the settings.config so all configuration settings will retain.
 - **DO NOT** manually clear the **C:\Click2Pay Sage Sync Service** directory
 - Select the Click2Pay Sage Sync Service and click on UNINSTALL
 - When UNINSTALL is complete, follow the INSTALLATION OF WINDOWS SERVICE steps noted above.

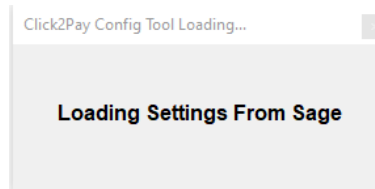


Setup Windows Service

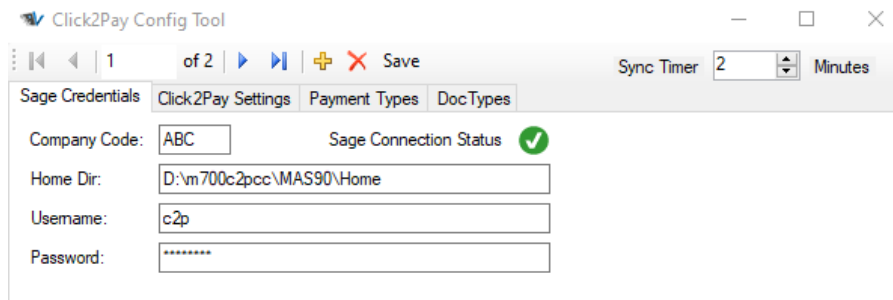
- Click on the Click2PayConfigTool option to access configuration settings



- When selected, this process will read the Sage configurations and load information into the screens (if available). Note that this may take several minutes

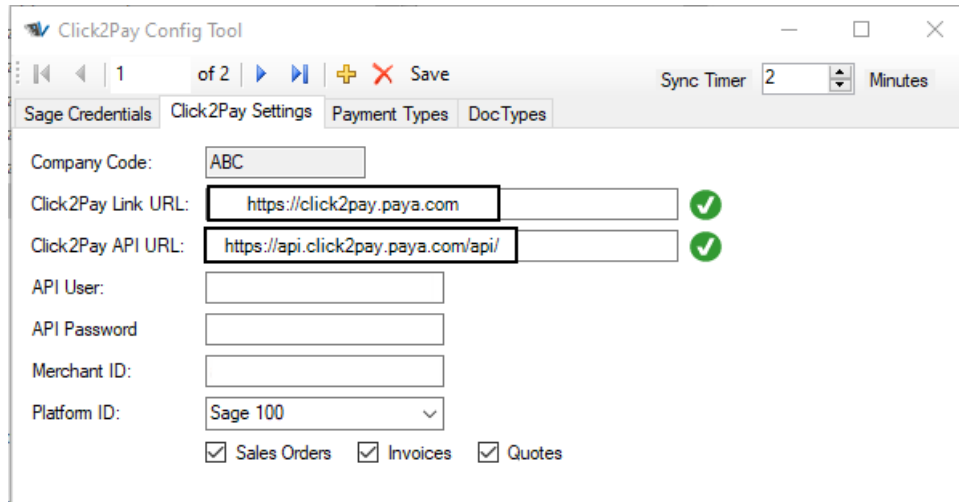


- Note that when moving between the tabs it may take a few minutes to pull & accumulate data from the Sage system.
- Sage Credentials
 - Enter Company Code (when the Sage company is confirmed the checkbox will be green)
 - Enter Sage 100 directory structure to the MAS90\HOME
 - Enter the Sage 100 login created for the C2P interface
 - (Sage user setup for C2P needs to be able to do AR processes / SO process / paperless office)
 - Enter the Sage 100 password created for the C2P interface



- Click2Pay Settings
 - Company Code will pull from the Sage Credentials screen and will be locked
 - Click2Pay Link URL: enter www.click2pay.paya.com
 - Click2Pay API URL: enter <https://Api.click2pay.paya.com/api/>
 - API User: enter the API USER provided from Paya
 - API Password: enter the API USER Password provided via email
 - Merchant ID: enter the Merchant ID associated with the Sage 100 company code (provided by Paya)
 - Platform ID: Select Sage 100
 - Select the transactions to be integrated
 - Sales Orders – select if utilizing Sales Order prepayments
 - Invoices – should always be selected. Pertains to AR Open Invoices (from AR & SO Inv)
 - Quotes – select if taking prepayments on Sales Order Quotes.

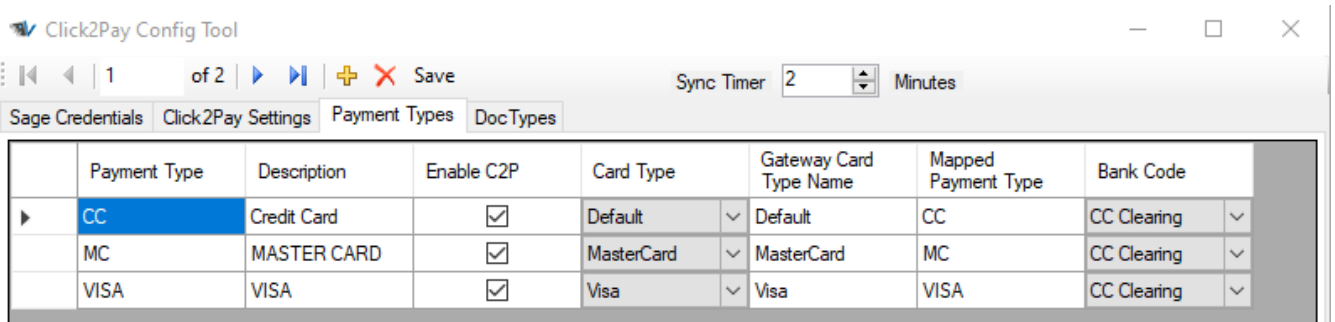




The screenshot shows the 'Click2Pay Config Tool' window with the 'Click2Pay Settings' tab selected. The 'Company Code' is 'ABC'. The 'Click2Pay Link URL' is 'https://click2pay.paya.com' and the 'Click2Pay API URL' is 'https://api.click2pay.paya.com/api/'. Both URLs have green checkmarks next to them. The 'API User' and 'API Password' fields are empty. The 'Merchant ID' field is empty. The 'Platform ID' is set to 'Sage 100'. At the bottom, there are three checked checkboxes: 'Sales Orders', 'Invoices', and 'Quotes'. The 'Sync Timer' is set to 2 minutes.

- Payment Types

- o Data will pull from the Sage system
- o Payment Types should be selected for ENABLE C2P if they are to be utilized in Click2Pay Portal
- o Card Type
 - Choose the card type if Payment Types are setup by CC Type (Visa / MasterCard / Discover etc)
 - Choose DEFAULT if there is a generic card type.
 - In the example below the Visa and Mastercard are denoted to the specific card type and CC to the Default. If a Discover Card is entered or Amex it will post to the CC Payment Type as there is not a specific Payment Type for those card types.
 - Gateway Card Type Name >> key in the same as the Card Type (same case)
 - Mapped Payment Type >> same as the Payment Type
 - Bank Code >> drop box will show all Bank Codes from Sage 100 – select the correct one for the Payment Type. Bank Code should match what is assigned in the PAYA AF button in Payment Type Maintenance (Sage 100).



The screenshot shows the 'Click2Pay Config Tool' window with the 'Payment Types' tab selected. It displays a table with the following data:

	Payment Type	Description	Enable C2P	Card Type	Gateway Card Type Name	Mapped Payment Type	Bank Code
▶	CC	Credit Card	☒	Default	Default	CC	CC Clearing
	MC	MASTER CARD	☒	MasterCard	MasterCard	MC	CC Clearing
	VISA	VISA	☒	Visa	Visa	VISA	CC Clearing

- DocTypes

- o Screen shows the different form types – Sales Order / Quote / Invoice based on selections from the Click2Pay Settings screen.
- o MultiPay can only be selected for AR INVOICE which indicates 1 or more invoices can be selected at the same time for payment. Sales Orders & Quotes can only be paid 1 at a time.

- Order – the order entered will dictate what order the FORMS show in the portal. The recommended is Invoice = 0, Sales Order = 1, Quote = 2
- Sync Timer defaults to 5 minutes and can be adjusted from 1 to xxx. This timer indicates the frequency the sync process will automatically pull information from the Portal (payments) and items from Sage to sync to the Portal

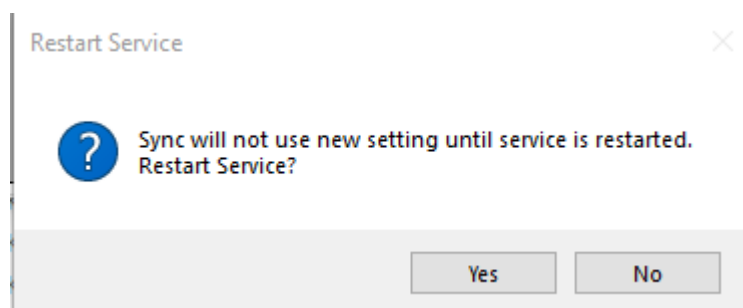
Click2Pay Config Tool

1 of 2 | + X Save Sync Timer 2 Minutes

Sage Credentials Click2Pay Settings Payment Types DocTypes

	System	DocType	MappedDocType	MultiPay	Order
▶	S/O	▼ Sales Order	▼ Sales Order	☐	1
	S/O	▼ Quote	▼ Quote	☐	2
	A/R	▼ Invoice	▼ Invoice	☒	0

- Click SAVE to save the values entered
 - All values must be populated to allow saving
 - SAVE COMPLETE popup will display when complete – this process can take a few minutes
 - Restart Service popup will display after saving – Click YES to restart the Windows Service



- Close the Click2Pay Config Tool by using the X top right

Verify the windows service is running and set to Automatically restart upon system reboot

