

AccountMate's Click to Pay module gives users a quick and convenient way to collect their receivables by providing access to a secure payment portal where their customers can view outstanding invoices and pay them online. Users can send electronic invoices that have a Click to Pay link to their customers. Customers use the link to access the payment portal where they can enter the payment information themselves. AccountMate downloads payment transactions processed through the portal to automatically update customer balances and payment information.

AccountMate 12 for SQL or Express Click to Pay Module

Partnership with Repay – a Trusted Name in Financial Technology and Payment Solutions

AccountMate has partnered with Repay to provide our users this service. Users must separately register with Repay each company that wants to use the Click to Pay module. Once registered, each company will be given unique login information to upload invoice details to and download payment details from the payment portal.

Invoice Date	Order Date	SO Number	Ordered By	Customer PO Number	Payment Method
09/20/22	09/20/22				Cash @ Pkg. 1315A
Ship Via	F.O.B.	Ship Via	Telephone	Invoice Number	Trade Number
MAAT			San Diego	284281818	
Order Quantity	Ship Quantity	Test	Item Number / Description	Unit Price	Extended Price
1	1	T	AEROCRAIF-A1 Aero-A1 Conference Chair	120.00 +1.00 %	120.00 -4.00
Print Date: 09/20/22		Total Paid: \$ 120.00		Subtotal: 114.00	
Print Time: 12:43:02 PM		Balance Due: \$ 127.83		Freight: 3.00	
Page No: 1		Due Date: 09/20/22		7.250 %Sales Tax: 8.83	
Printed By: Superuser		Click to Pay		Invoice Total: \$ 127.83	

[Click to Pay Invoice](#)

Set Up Pay Codes for Use in Click to Pay Transactions

Having the Click to Pay module doesn't take away the option to process customer payments in the traditional manner. As such, users must set up pay codes to be used specifically with Click to Pay transactions. Use these Click to Pay pay codes to generate electronic invoices that contain a link to the payment portal. Customers can click on this link to access the payment portal.

View and Pay Outstanding Invoices in One Secure Site

When an invoice that is assigned a Click to Pay pay code is created, its details are automatically uploaded to the payment portal. Customers can view all their outstanding Click to Pay invoices in the payment portal. They can choose one or multiple invoices to pay at any given time. Payments can be made via ACH or by credit/debit card. Visa, Mastercard, American Express and Discover cards are all supported.

Perform Immediate or Scheduled Transaction Synchronization

- Users can configure AccountMate to download payments made through the portal immediately or on a preset schedule. During download, the software automatically syncs and updates the company's AR invoice balances and customer payments based on information entered through the payment portal. This saves the user from having to manually record customer payments made through the portal.

Save Money with Level 3 Credit Card Processing

- AccountMate's Click to Pay module sends Level 3 data to credit card processors. Level 3 requires the most extensive data that includes line item details (e.g., shipment origin ZIP/postal code, shipment destination ZIP/postal code, invoice number, item number, etc.) about the sales transaction which go beyond the minimum required for traditional credit card transactions. This type of credit card data leads to lower interchange rates and lower processing costs on Business to Business (B2B) and Business to Government (B2G) transactions. This results in a substantial reduction in credit card fees for Click to Pay users.

Seamlessly Integrates with AccountMate Sales Order and Accounts Receivable Modules

- Users can assign Click to Pay pay codes to sales quotes, sales orders and AR invoices. They can also assign Click to Pay pay codes as the default for customer records.

AccountMate Software Corporation

1445 Technology Lane | Suite A5 | Petaluma, California 94954 | USA
800-877-8896 | 707-774-7500 | www.accountmate.com