

AccountMate's ClickToPay feature 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 here to pay online" 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 13 for SQL or Express ClickToPay

Provide a Fast and Secure Way for Customers to Pay Online

With the ClickToPay feature, your customers now have a safe and convenient way to pay their invoices online. They can access the online payment portal by clicking on the "Click here to pay online" link on the electronic invoices sent to them. This takes them to a secure website where they can see a list of their outstanding invoices. They can select the specific invoices they want to pay and click a button. They will then be shown a screen where they can select their preferred payment option and enter their payment information. Customers never have to share their credit card/banking information with you, giving them peace of mind while giving you a quick and effortless way to get paid.

ClickToPay Online Payment Portal

Save Money with Level 3 Credit Card Processing

AccountMate's ClickToPay feature sends Level 3 data to credit card processors. Level 3 requires the most extensive data that includes line item details 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 ClickToPay users which saves you money.

Set Up Pay Codes to Use in ClickToPay Transactions

Having the ClickToPay feature doesn't take away the option to process customer payments traditionally. As such, users must set up pay codes to be used specifically with ClickToPay transactions. Use these ClickToPay 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 ClickToPay pay code is created, its details are automatically uploaded to the payment portal. Customers can view all their outstanding ClickToPay 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 synchronizes and updates the company's AR invoice balances and customer payments based on information entered through the payment portal. This saves you the time that would have been spent on manually recording customer payments made through the portal and reduces data entry errors.

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

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

Seamlessly Integrates with AccountMate Sales Order and Accounts Receivable Modules

- Users can assign ClickToPay pay codes to sales quotes, sales orders, and AR invoices (i.e., regular AR invoices, imported AR invoices, and recurring AR invoices). They can also assign ClickToPay pay codes as the default for customer records.
- Ability to copy the ClickToPay URL from the customer record and paste it onto the web browser to directly access REPAY's ClickToPay portal.

AccountMate Software Corporation

1445 Technology Lane | Suite A3 | Petaluma, California 94954 | USA
800-877-8896 | 707-774-7500 | www.accountmate.com