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PayPal Processing in CRM - Overview

- Invoices and Invoice Payments
  - Invoice payments link one payment "transaction" to one or more invoices
- Credit Cards
  - Credit card information and capture *only*

Invoices and Invoice Payments

- Invoice Payment record
  - Has line items (like an invoice)
  - Each line item relates to a single invoice (or credit note)

- Go to Invoice
  - Click "Create Payment" button
  - Creates a new invoice payment record linked to your invoice

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Invoice Payment Details

- Total Amount – is auto calculated based on individual payment amounts
- Pay multiple invoices – by adding new invoice payment item lines
- Only final invoices can be associated to invoice payments

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Credit Cards

- Use for capturing credit card details
- Fields
  - Name – easily recognizable name for your card
  - Status – Pending, Verified, Cancelled and Declined
    - Pending – never sent to PayPal
    - Verified – captured as token by Paypal
    - Cancelled – not usable, manually or automatically cancelled – was verified
    - Declined – was verified, could be a temporary issue
  - Credit card type – used to identify card types later
  - Card ending – last four digits of card as captured
  - Expiry date
  - Cardholder first and last names – this is what will display on the receipt

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Credit Card Capturing – Step by Step

1. Create new Credit Card
2. Enter Name (for you to identify the card)
3. Enter Card holder first name and Card holder last name
4. Save
5. Reload page
6. Click "Verify Card"
7. Complete Steps
8. On return card will be verified (or not)

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Paying Invoices – Step by Step

1. Go to Invoice to pay
2. Click "Create Payment" button
3. Open newly created payment
4. Select Credit Card to pay with
5. Save record with Credit Card
6. Click "Pay Now" button
7. Payment will be processed and receipt will be displayed in box where Pay Now button is. Receipt will also display below for future reference

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Paying Partial Invoice – Step by Step

1. Go to Invoice to pay
2. Click "Create Payment" button
3. Open newly created payment
4. Open payment line item.
5. Change amount to pay to be less than default (entire amount on invoice)
6. Save payment line item
7. Return to Payment (parent record)
8. Select Credit Card to pay with
9. Save record with Credit Card
10. Click "Pay Now" button
11. Payment will be processed and receipt will be displayed in box where Pay Now button is. Receipt will also display below for future reference

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Client Card Entry

1. Create new credit card
2. Enter billing first and last name
3. Add contact and click save
4. Click "Generate Email" button
5. View, edit and send email
6. Client will be able to enter their own card details directly at that stage

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