



SAGE 50 E-INVOICING

Version 1 REV05012022



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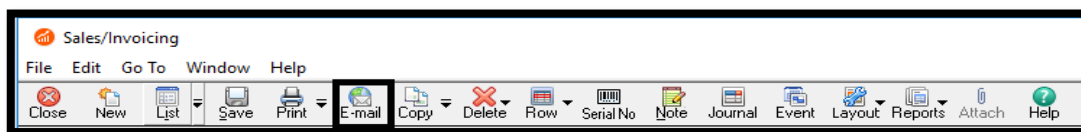
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SET UP IN SAGE 50

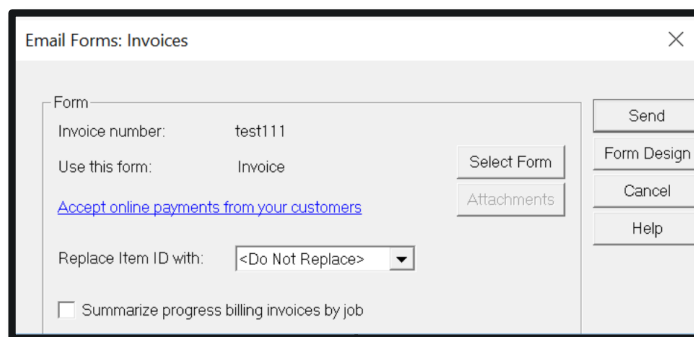
Sage 50 has the ability to email invoices with a Pay Now link. This option allows your customers to pay for their own invoice by a click of a button or copy/pasting link to internet browser. Once the customer makes the payment, it will post back to Sage 50 and mark the invoice as paid.

*****ACCOUNTING METHOD MUST BE ACCURAL FOR COMPANY; CAN NOT BE CASH*****

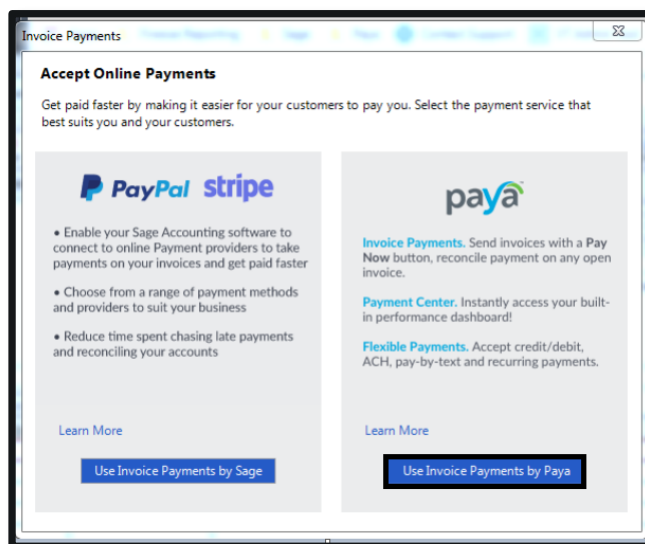
1. Create a new invoice or pull up an existing invoice through **Sales/Invoicing**. Once the invoice is pulled up, click on the Email tab on the top toolbar of the invoice.

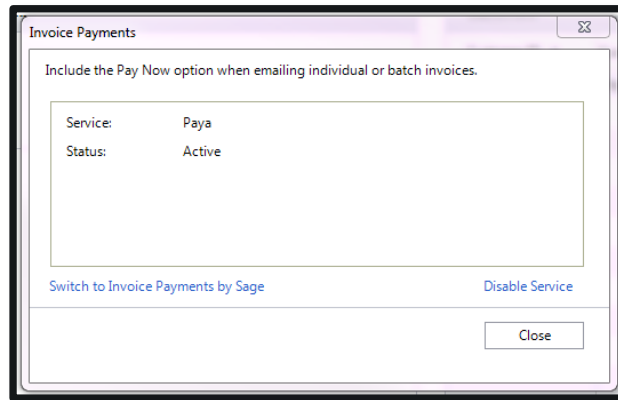


2. The **E-mail Forms: Invoices** window will appear. Here you will find the hyperlink, “**Accept online payments from your customers.**” Click on the link to enable the Pay Now button.

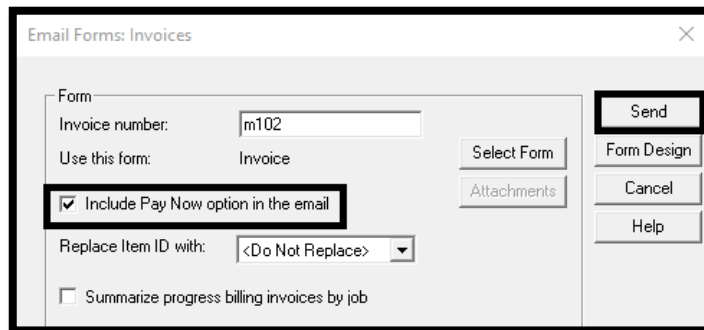


3. Click on **Use Invoice Payments by Paya**. This will activate the Pay Now link.





4. The **“Include Pay Now option in the email”** will be checked by default, giving you the option to choose who you want to send the Pay Now link to.

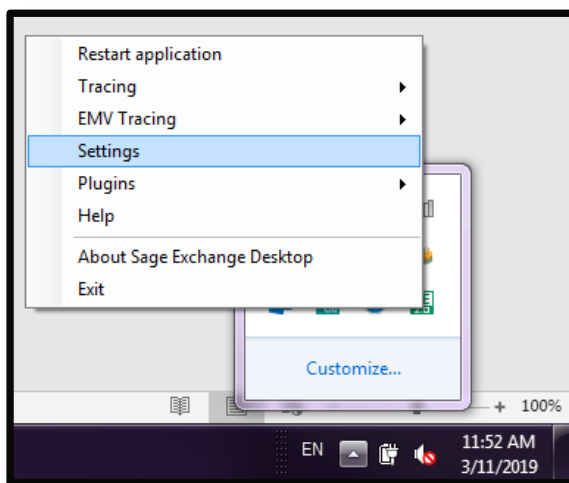


SETTING UP THE PLUG IN

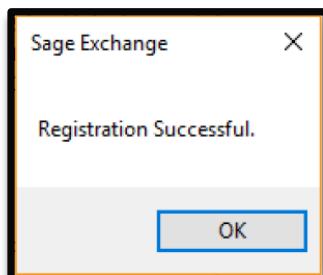
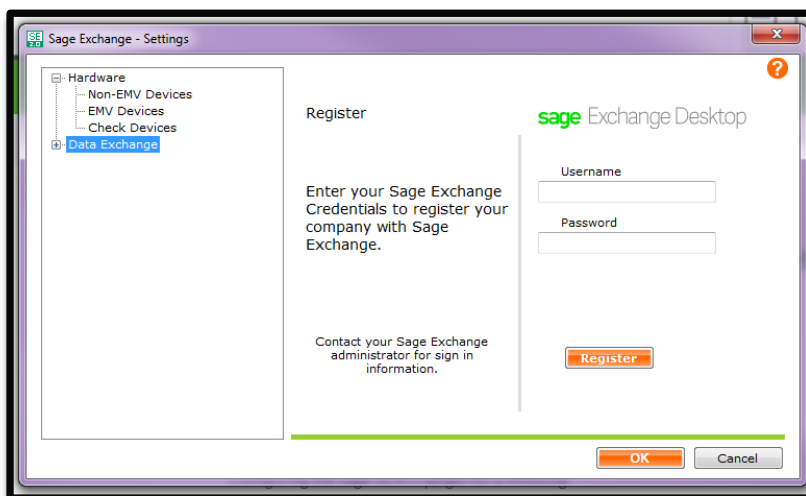
Before emailing the link, you must make sure the plug in is setup for the transactions to post back into Sage 50. By completing this process, it will mark the invoices as paid and post the transaction into the selected General Ledger account. This process is completed through the Paya Connect Desktop Application.

****Only needs to be setup on one workstation per company.****

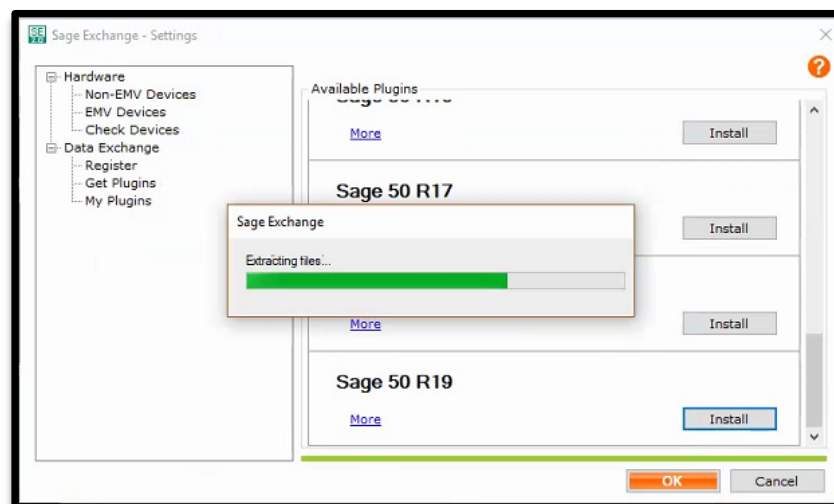
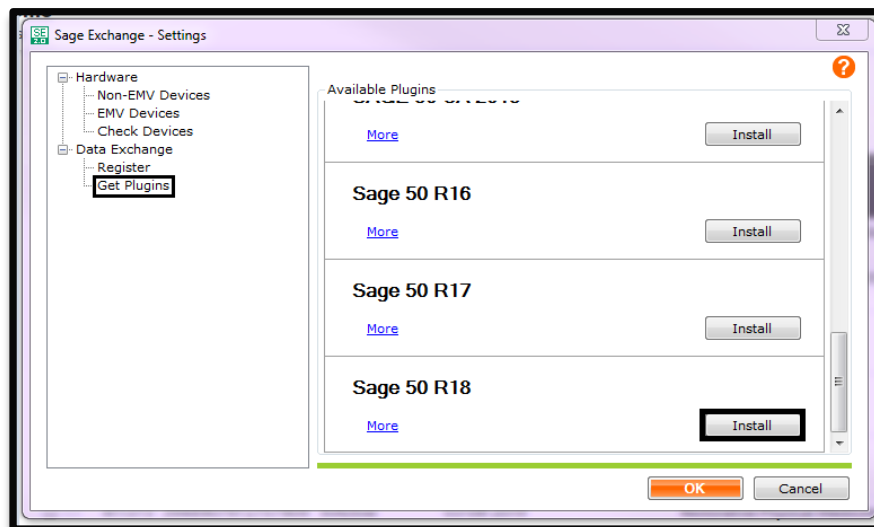
1. Right click on the Sage Exchange Desktop Application and click on **Settings**.



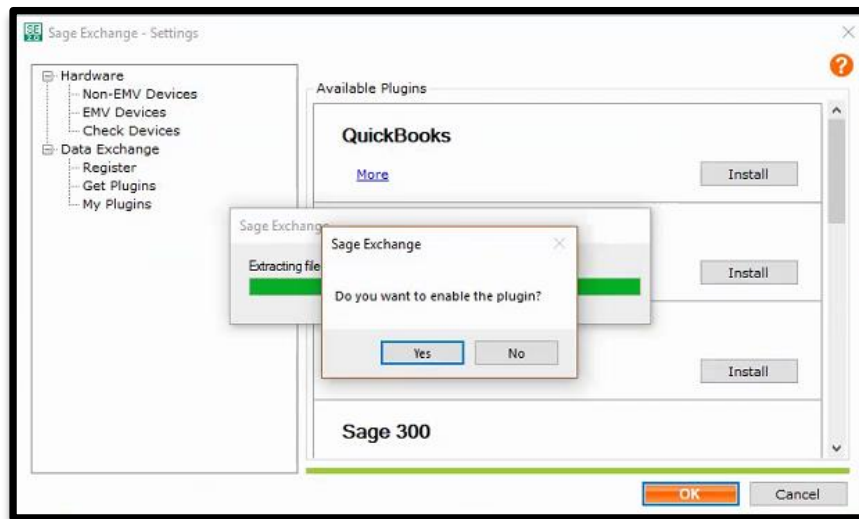
2. Click on **Data Exchange** and register using your credentials for Paya Exchange. Click on **Register**, then click **OK**.



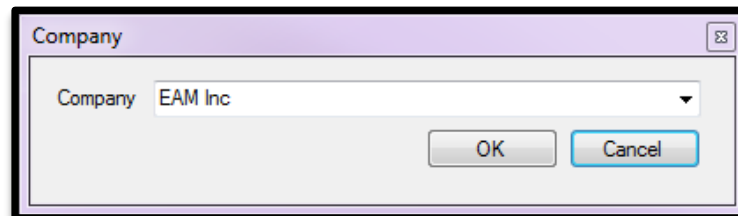
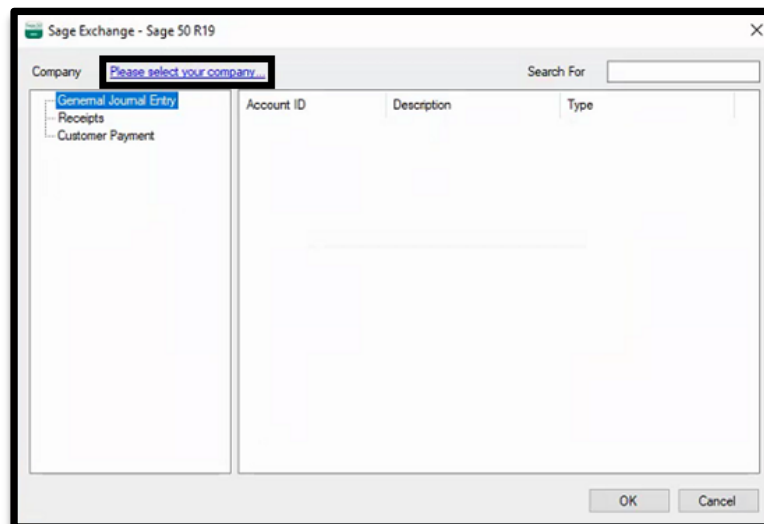
3. Click **Get Plugins**. Pick the plugin based on the version of your Sage 50 and click **Install**.



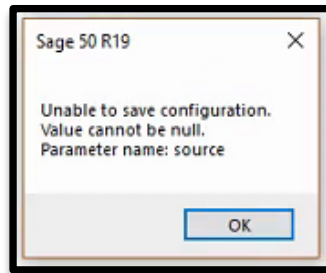
- Once the pop up comes up to enable the plugin, click **Yes**.



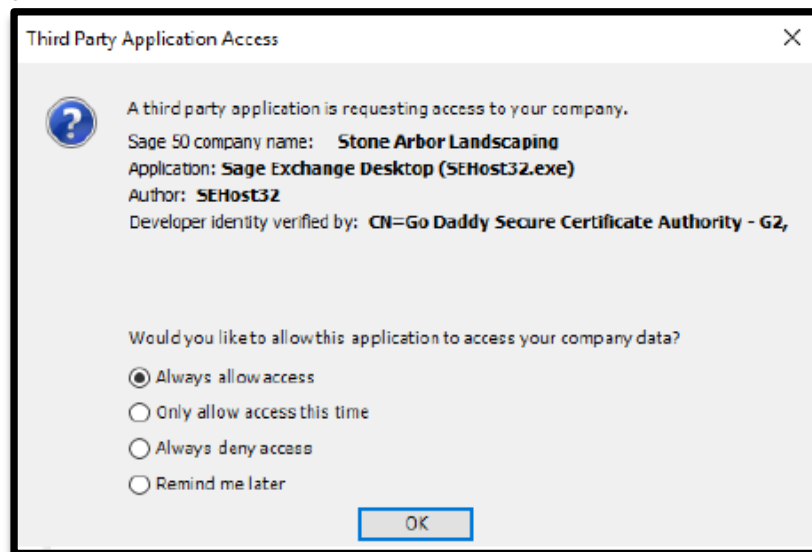
- Click **Please select your company** to choose your company then click **OK**.



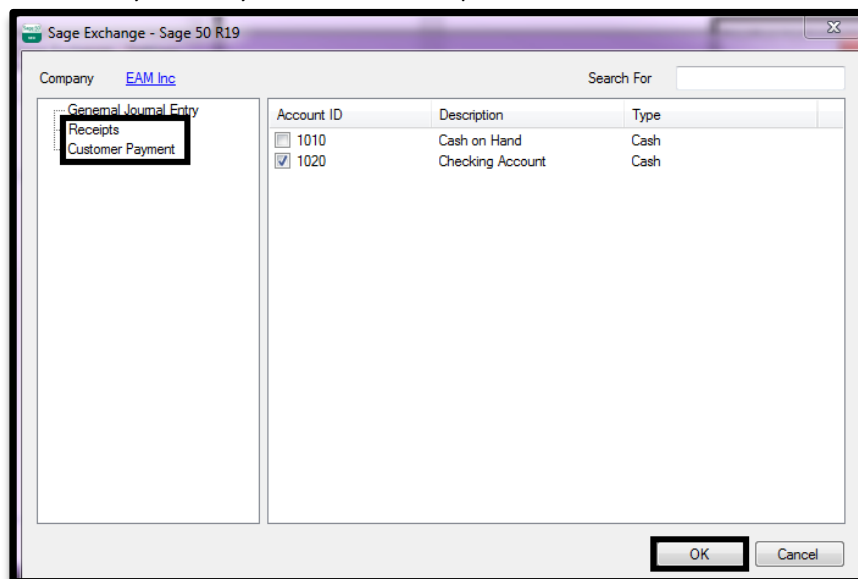
- Once you click **OK**, a Sage 50 R19 pop will appear, which means a connection is not established between Sage 50 and the plug In.



- To enable the plugin, close out Sage 50, re-open it and log back into the same company. A Third-Party integration will pop up, choose **“Always Allow Access.”**

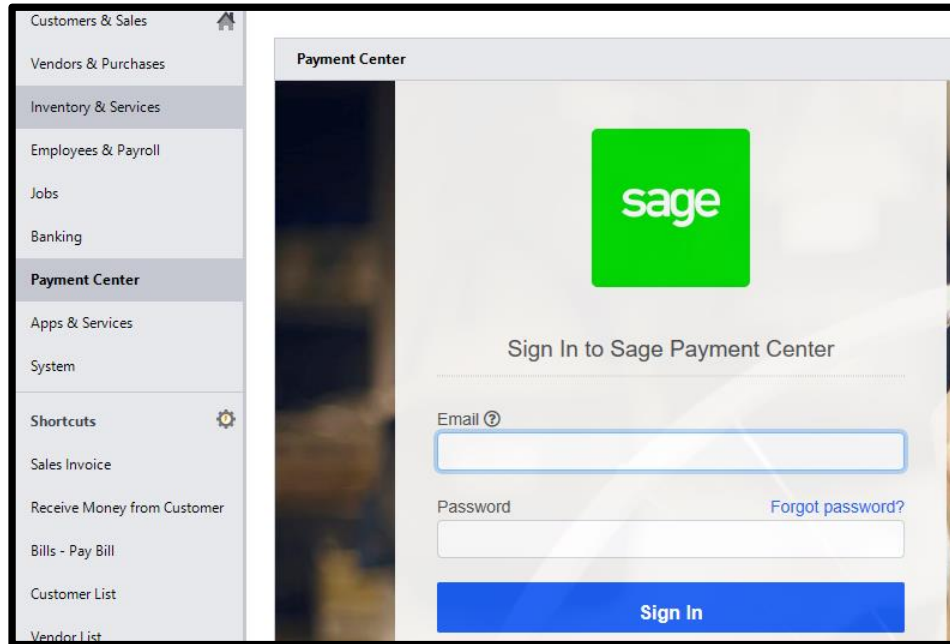


- Go back to the plug in and click **Enable**. Select your company. Under **Receipts** and **Customer Payment**, choose the General Ledger account where you want your transactions to post. Click **OK**.

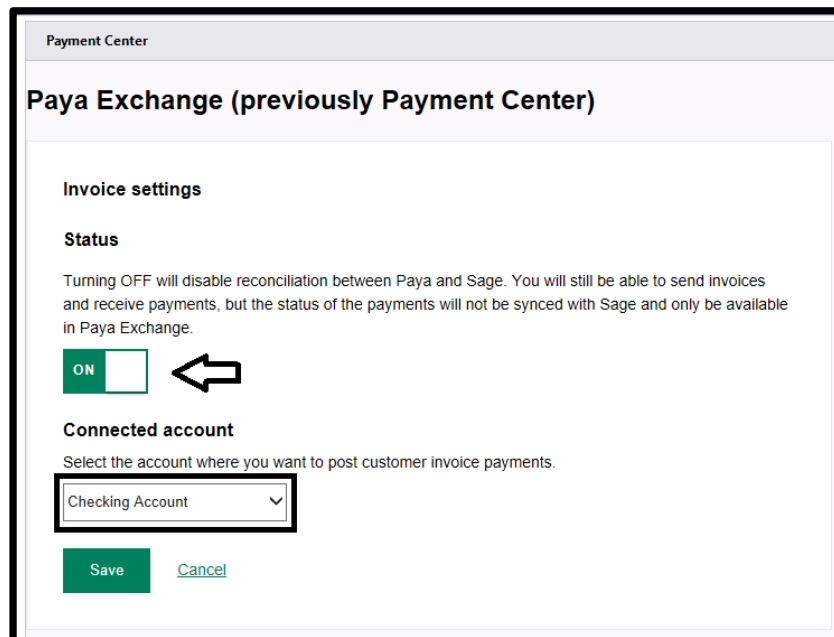


ENABLING SERVICE IN PAYMENT CENTER

1. In Sage 50, go to the Payment Center tab and log in with your Paya Exchange credentials.



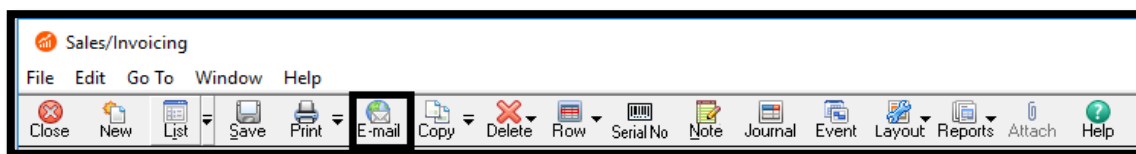
2. To enable, click **Edit settings** on the top portion of the page. This is where you will turn **ON** the service and select the connected account. Click **Save** and the setup is complete.



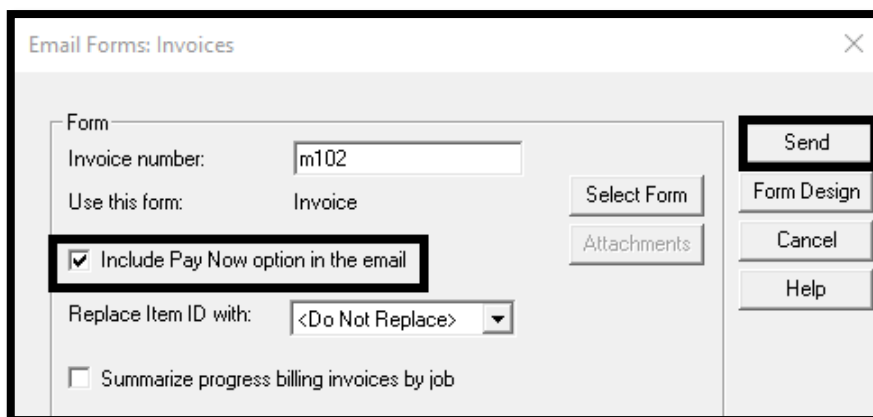
EMAILING INVOICES W/PAY NOW LINK

Sage 50 has the ability to email invoices with a Pay Now link. This option allows your customers to pay for their own invoice by a click of a button or copy/pasting link to internet browser. Once the customer makes the payment, it will post back to Sage 50 and mark the invoice as paid.

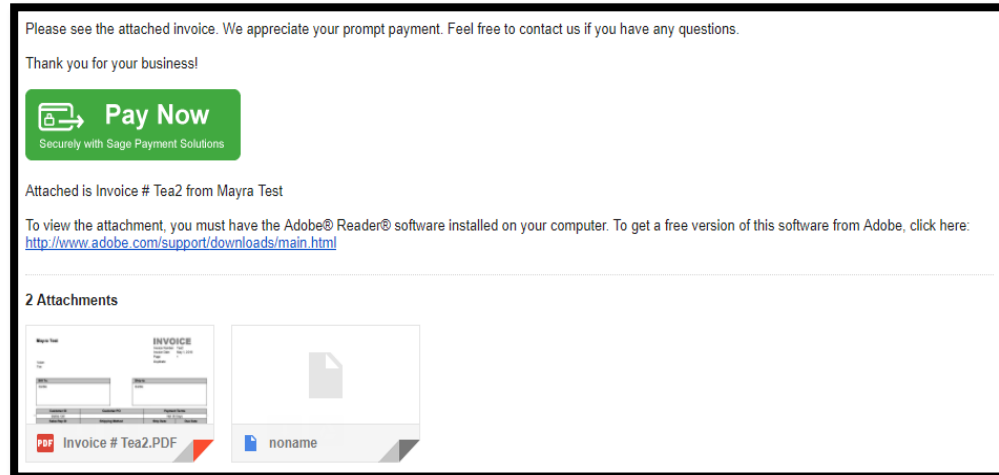
1. Create a new invoice or pull up an existing invoice through **Sales/Invoicing**. Once the invoice is pulled up, click on the Email tab on the top toolbar of the invoice.



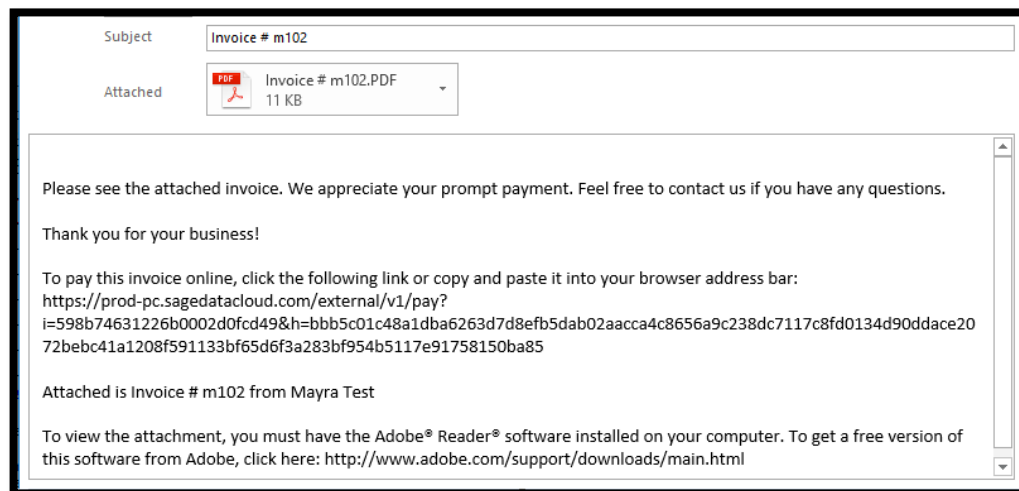
2. **The E-mail Forms: Invoices** window will appear. The “**Include Pay Now option in the email**” will be checked off by default. Click the Send button on the right side of the window.



3. Sage 50 will then open a new email and populate the email address from the customer's profile stored in Sage 50. If there is not an email that is stored, this field will be left blank. The software will also attach the invoice as a PDF file. You will be able to customize the email if needed. **ONLY** web-based emails will provide "Pay Now" button; Microsoft Outlook **ONLY** has link available. Press the **Send** button to send the email.



Web based:



Outlook: