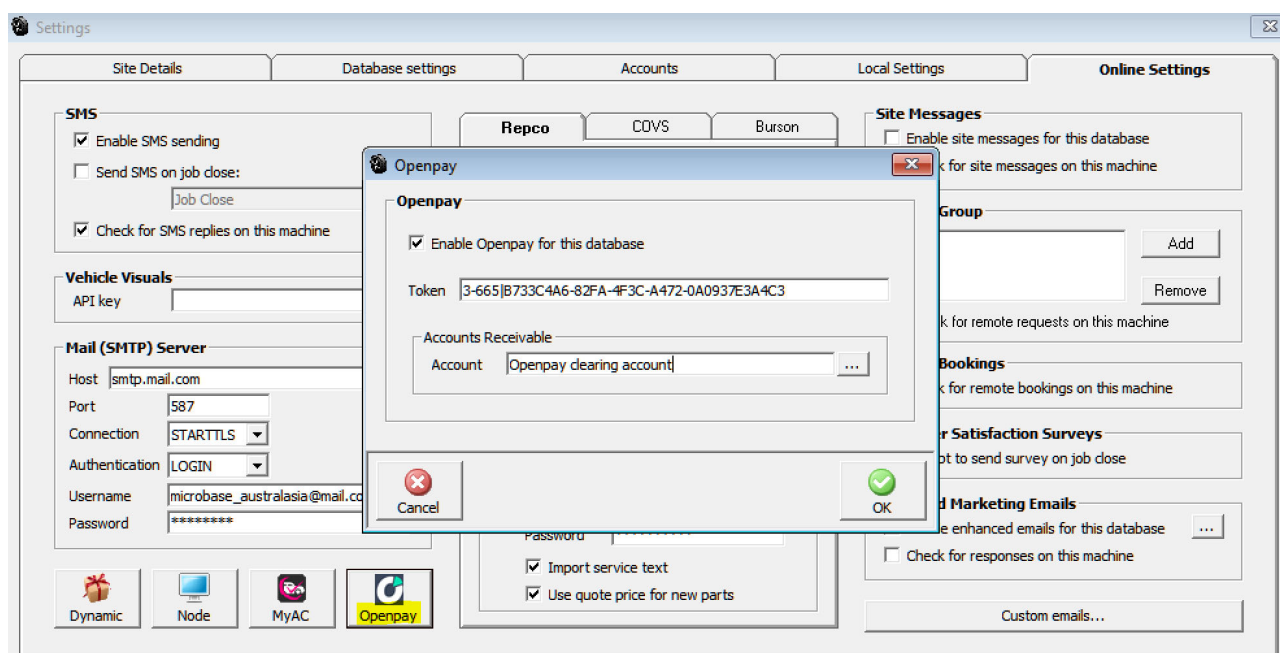


Openpay

Overview: Automation now interfaces with the Openpay online network, this new feature allows you to process billings directly to Openpay, once authorised the pending payments due are deposited to an Openpay clearing account (bank account) you will need to create this account via your account list for information on how to create a clearing account click on this link [Clearing Accounts](#). You can use this account to transfer payments as they are received directly to your bank via the transfer funds option available from the admin menu. You can also pay any fees due to Openpay from the clearing account by raising a bill in purchasing for outstanding processing fees and then paying from the Openpay clearing account.

Enabling Open Pay: To accept Openpay you will first need to **enter your token details provided by Openpay**, if you do not have a token please **contact Openpay direct as Microbase does not have the ability to generate these credentials**. Next go to File / Site Settings / Online > Openpay Option.



From the Openpay screen select the enable Openpay for this database option, enter your token number, we suggest you receive all openpay payments into the Openpay Clearing Account (you will need to create the clearing account), you can if you wish use an alternate, selecting the button to the right of the account field will open the account list, point and double click on your selection and save with OK (F12). We strongly suggest you separate your Openpay transactions as this will make for easy reconciliation when transferring to your bank or paying any Openpay charges. Save your settings with OK (F12) from the Openpay and site settings display.

Openpay, Transaction Processing: Firstly, it is important to note that Openpay need to receive details of the transaction, for this to occur you can only process Openpay from either the payment option as you close the job card or charge invoice and the sales screen by highlighting the transaction and selecting payment from the bottom of the screen. Please be aware that you can't process multiple invoices in one Openpay transaction, each invoice will need to be authorised and processed individually.

From the sales screen highlight the invoice you wish to process via Openpay or if proceeding from the close job card form simply click on payment. In the payment receipt form make sure the correct transaction is flagged for payment, move up to the media filed and select Openpay, a sub screen will open requesting you to enter the customer ID. Enter the details and select create.

Openpay

The screenshot displays the 'Payment Receipt Form' and the 'Openpay' sub-form. The 'Payment Receipt Form' includes a table of invoices and a 'Payment Allocation' table.

Date	Inv#	Type	Status	Order#	Rego	Company/Surname	First Name	...	Value	Paid	Balance	Print
9/11/19	65	Invoice	Closed		700963	Tong	Sydney		\$48.64	\$0.00	\$48.64	
28/10/19	73	Invoice	Closed		700963	Tong	Sydney		\$383.35	\$0.00	\$383.35	
10/10/19	118	Invoice	Closed		07778P	Eggs	Pauline		\$330.00	\$0.00	\$330.00	
9/10/19	71	Invoice	Closed		9TY78P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
7/10/19	122	Invoice	Closed		8P077P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
7/10/19	95	Invoice	Closed		1GTU2P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
3/10/19	116	Invoice	Closed		70011P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
3/10/19	104	Invoice	Closed		UK123P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
3/10/19	103	Invoice	Closed		07778P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
26/9/19	112	Invoice	Closed	123	1EDG6P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
26/8/19	93	Charge	Closed		n/a	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
15/8/19	68	Invoice	Closed		9TY78P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
21/7/19	57	Invoice	Closed		7UL82P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
21/7/19	56	Invoice	Closed		7K936P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
19/7/19	60	Invoice	Closed		8P077P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	
18/7/19	55	Invoice	Closed		GO123P	Eggs	Pauline		\$132.00	\$0.00	\$132.00	

Date	Inv#	Client/Company	Value	Paid	Balance
10/10/19	118	Eggs	\$330.00	\$330.00	\$0.00
3/10/19	103	Eggs	\$129.40	\$0.00	\$129.40

The 'Openpay' sub-form shows the 'Payment Receipt Form' and the 'Openpay' sub-form. The 'Payment Receipt Form' includes a table of invoices and a 'Payment Allocation' table.

The client will via the Openpay application receive an intention to buy notification, before you can proceed they need to accept the payment plan and select proceed from their smart phone. You will see a message informing you that the plan has been created, a reference number is inserted into the Openpay sub form, once the client accepts the plan you can select the confirm option.

The screenshot displays the 'Payment Receipt Form' and the 'Openpay' sub-form. The 'Payment Receipt Form' includes a table of invoices and a 'Payment Allocation' table.

Date	Inv#	Client/Company	Value	Paid	Balance
10/10/19	118	Eggs	\$330.00	\$330.00	\$0.00
3/10/19	103	Eggs	\$129.40	\$0.00	\$129.40

The 'Openpay' sub-form shows the 'Payment Receipt Form' and the 'Openpay' sub-form. The 'Payment Receipt Form' includes a table of invoices and a 'Payment Allocation' table.

A confirmation message is displayed: "Automation Client 3.7.0 Plan successfully created. Please wait for the client to accept the plan, then click the confirm button." The message includes a green checkmark icon and an 'OK' button.

You will now receive an order and plan status indicator, approved and active, to deposit the payment into your Openpay clearing account select the OK (F12) option at the bottom of the form, you are then taken into the Automation payment receipt form showing the payment and the account it has been deposited to.

Openpay

Payment Allocation

Date	Inv#	Client/Company	Value	Paid	Balance
10/10/19	118	Eggs	\$330.00	\$330.00	\$0.00
3/10/19	103	Eggs	\$129.40	\$0.00	\$129.40

Allocated \$330.00
Remainder \$0.00
Auto Apply

Openpay payment

Invoice No. 118
Amount \$330.00

Plan details

Customer ID 300147025
Plan ID 3000000043263
Order status Approved
Plan status Active

Payment Receipt Form

Client Details

Client Earl Reid

☒ Include subaccounts

Payment Terms

Current Balance \$631.00

Unallocated \$0.00

Payment Details

Amount \$123.00
Date 13/11/19

Media Openpay

Account Openpay clearing account

Record

Payment Allocation

Date	Inv#	Client/Company	Value	Paid	Balance	Payment
9/10/19	71	Reid	\$123.00	\$123.00	\$0.00	\$123.00 <input checked="" type="checkbox"/>
15/8/19	68	Reid	\$508.00	\$0.00	\$508.00	<input type="checkbox"/>