Customer Payment Portal User Guide

The Customer Payment Portal extension syncs customer invoices in Microsoft Dynamics 365 Business Central to an online payment portal called Invoice Ninja.

Invoice Ninja Setup

1. An Invoice Ninja account must be set up for the store. Get started here: https://invoiceninja.com/how-it-works/
2. As explained in "Step 3" of the Invoice Ninja link above, a payment gateway must also be selected. If you have no preference, Stripe is recommended. An account will also need to be created for this selected payment platform.
3. In Invoice Ninja, go to Settings and search “token.” Open the API Tokens page and then click the API Tokens button. Create a new token and save the long string of text it gives you. You will need this later when setting up Business Central.
4. More information about setting up and using Invoice Ninja itself can be found in their user guide: https://invoiceninja.github.io/en/user-guide

Setup in Business Central

1. Now that you have an Invoice Ninja account, you can start setting it up with Business Central through this integration app. In Business Central, use the magnifying glass to search for "Customer Payment Portal." Open the "Customer Payment Portal Setup" page.
2. Check "Enabled Invoice Ninja Syncing."
3. In the "API Base URL" field – Enter the URL of the Invoice Ninja account, which will look similar to this: https://invoicing.co/#/
4. In the "API Token" field, paste the token you got from Invoice Ninja in step 3.
5. "Default Item No." – This item acts as a placeholder used on invoices. Create any item in BC to use here.
6. "Default Journal Template," "Default Journal Batch," and "Bal. Account No." – When a payment originates in Invoice Ninja, the app will automatically create and post a Cash Receipt Journal in Business Central. These fields are used with that Cash Receipt Journal, so set these fields to whatever you would use if you were to manually add payments using the Payment Journal page.
7. "Disable Invoice Emails" – This optional setting can be used to prevent the payment portal from automatically emailing customers after every invoices is synced.

Using the Customer Payment Portal with Business Central

- Each customer can be opted in to use the payment portal. In the customer card, use the "Allow Online Customer Payment Portal" setting under the Customer Payment Portal section. Then, in the action bar at the top, go to Actions > Customer Payment Portal > Sync Customer. The customer will now appear in Invoice Ninja.
- Posted Sales Invoices have a new Customer Payment Portal action in the action bar. This can be used to manually sync them to Invoice Ninja. However, this will also be done automatically through the job queue in Business Central.

- When a customer makes a payment through the payment portal, it will appear on the "Customer Payment Portal Payment Staging" page. This page has options to manually sync to Invoice Ninja and create payments in Business Central. This will be done automatically through the job queue.
- When a customer makes a payment or some other application to an invoice in Business Central, a payment will be synced to Invoice Ninja. Similar to invoices, this can also be done manually on the Detailed Customer Ledger Entries page.

Setup Job Queue Entries in Business Central

Two Job Queue Entries need to be set up in Business Central to sync payments from Invoice Ninja. One is used to automatically fetch the payment information from Invoice Ninja in regular intervals, while the second will automatically post these payments in Business Central. On the Job Queue Entries page, Click on new. This will open the Job queue entry card. Fill the following fields.

1. Object Type to Run – Codeunit
2. Object ID to run – 70372224
3. Activate recurring Job on Mondays, Tuesday till Sunday
4. Set No. of Minutes between Runs – 1
5. Click on Process – Set Status to Ready

Repeat the above steps for Object ID 70372224.

The basic setup for the app is now complete.

Useful Information, Setups, and Features in Invoice Ninja

Commonly Used Invoice Ninja Settings

- A D365 BC Customer becomes an Invoice Ninja "Client"
- **Settings That Control Portal (for Management Users and All Clients)**
    - Settings > Client Portal > Client Portal switch = On to make the Client Portal accessible for management staff.
    - Settings > Client Portal > Client Portal switch = On so the Client (Customers) can login to the portal
    - Settings > Client Portal
        - Portal Mode = Subdomain
        - Subdomain = <type in something similar to your brand> example syssolutionspayment
        - This creates a URL which can be included on D365 BC E-mail body, Invoices, and / or Statements so the Client can click to login to the Invoice Ninja Client Payment Portal
            - From the above Demo company, the Client login URL to put on the D365 BC Invoice or Statement: https://syssolutionspayment.invoicing.co/client/login

- **Settings Specific to Individual Clients and their Contacts**
    - Clients > Highlight Client > Settings > Allow Underpayments to allow Client to pay less than the full amount of the Invoice
- **Group Settings to Apply to Groups of Clients or All Clients**
    - Settings > Group Settings to apply a standard set of settings to a large group of clients.
        - For most settings, the app will first check if the client has a value in place, if not it will check if the client belongs to a group and if that group defines a value. Finally, it will use the default value set at the company level. The benefit of using groups is that if in the future you need to change the setting you can change it one place rather than having to update multiple clients individually.

Adding new Client Contacts

- Clients > Select Client to View > Edit button > Add Contact link to add another Contact
    - Fill in: First Name, Last Name, E-mail, Phone (Optional)
        - You can only add new Contacts to a Client from the admin portal. Customers cannot add more Contacts to their Client entry from the client portal themselves.
    - Once a Client Contact is added
        - Advise the Contact to go to payment portal URL, enter their e-mail (that was added to the Contact field), select "Forgot Your Password", and it will send an e-mail so Contact can set a password.
            - Password must be 8 characters.
        - Contact can then login to the portal using their e-mail and password, to see and pay invoices (based on Client Portal and Client settings).

Paying Invoices

- It is not necessary to send Invoices or Statements from Invoice Ninja to get paid in the portal.
- D365 BC Invoices and synchronize to the Payment Portal.
- Applications such as payments made to invoices in BC synchronize to the Payment Portal.
- Business Central users may prefer to *just* send Invoices and Statements from D365 Business Central, with the link to the Portal using the URL (generated above) in the E-mail body, or the Document Layout.
- Sending Invoices and Statements from Invoice Ninja are useful as automatic reminders.

- **Option 1 - Client Contact logs into the Client Payment Portal and Self-Pays their Invoices.**
    - When a customer makes a payment through the payment portal, it will appear on the "Customer Payment Portal Payment Staging" page. This page has options to manually sync to Invoice Ninja and create payments in Business Central.

However, the syncing will be done automatically by the D365 BC job queue (setup above).

- **Option 2 - Business Central User logs into the Company Portal and Makes Payment with the Customers Credit Card to make a Card Not Present Payment and Store the Card.**
  - Login to Invoice Ninja Company Portal: https://invoicing.co
  - Clients > Select Client > Settings > Payment > Allow Underpayment = Enabled
  - From Company Portal > Select Client > Client Portal > Select Invoice(s) > Pay Now
  - Select Pay button > Enter Credit Card, Exp Date, CVV
    - Optionally save the card with Link (when prompted)
  - Select Pay Now button.

Using Invoice Ninja to Send Monthly Statements and Reminders

- **Add payment portal link to Invoice Ninja Statement template:**
  - In the Invoice Ninja Admin portal: Settings > Templates & Reminders > change Template to "Statement" > Edit subject and body as needed.
    - The available fields are listed in the area below $payment_url.
- **How to create an Invoice Ninja statement schedule:**
  - In the Invoice Ninja Admin portal: Settings > Schedules > Green "+ Create" button and fill out the details.
- **Auto Billing in Invoice Ninja**
  - Invoice Ninja has Auto Invoicing and Auto Billing.
  - With Auto Billing the Client can opt in and as long as there is a payment method on file, the payment will be auto processed and applied to the Invoice.
- **SMS Text Messages**
  - As of 5-1-24 Invoice Ninja does not send Text Message (SMS) reminders or payment links; no text messages