

Sage Pay User Guide

Sage One

Table of Contents

1.0	Sage Pay Integration	3
2.0	Taking payments through eInvoicing	4
3.0	Taking payments through Mail and Telephone orders	6
3.0	Running Sage Pay Payments Received report	8
4.0	Edit or Delete Sage Pay transaction	9

1.0 Enable Sage Pay Integration

NOTE: Before you link your Sage Pay account to your Sage One service, you need to make sure you've created the bank account that you want to record any card payments against. This should reflect your merchant account. If you haven't already done so, you must create one now. By creating the bank account, it helps you keep track of your Sage Pay transactions and you can reconcile them against your Sage Pay account.

1. Go to: Settings > Accounts Settings > Sage Pay Settings
2. Enter the following information:

Title	Description
Vendor Name	This is your Sage Pay vendor name as registered during your Sage Pay application process
User Name	This is your user name as registered during the Sage Pay application process
Bank A/C	Choose the bank account you want to use for your Sage Pay transactions
Password	This is your MySagePay login password
Encryption password	You can find this information in the email sent to you when you created your Sage Pay account

Please Note: If you're not sure what information to enter, you can check your details on the Sage Pay website or contact Sage Pay support on 0845 111 44 55.

3. Click Save

You've successfully integrated your Sage Pay account with Sage One.

Sage One automatically detects the type of Sage Pay account you have and enables Mail & Telephone Order payments, Pay Now eInvoicing payments or both based on this. Within Sage Pay settings a new check box appears, Pay now enabled. If you don't want to add a pay now option to your invoices, you can clear this check box.

2.0 Taking Payments through eInvoicing

If your Sage Pay account includes the option to take ecommerce payments, when you email an invoice to a customer it includes a Pay Now button that allows your customers to pay you directly from an invoice.

When the customer makes a card payment using the option, it automatically records the invoice as being paid and the payment appears in the customer's activity and the bank account you chose in the previous section.

The following steps show how your customer can make an online payment.

1. Open the invoice > Pay Now > click the payment method



Select Payment Method

Please click below to select the type of card you wish to use.



Please only click the cancel button below if you intend to abort this payment process.



2. Enter the card details > Proceed

Enter Card Details

Card Number*	<input type="text"/>
Payment type	Visa
Firstname:*	<input type="text" value="Test"/>
Surname:*	<input type="text" value="Test"/>
Valid From	Month: <input type="text"/> Year: <input type="text"/>
Expiry date*	Month: <input type="text"/> Year: <input type="text"/>
Security Code*	<input type="text"/>
Billing Address Line 1*	<input type="text" value="Test"/>
Billing Address Line 2	<input type="text"/>
Billing City*	<input type="text" value="Test"/>
Billing Post Code*	<input type="text" value="AB1 1AB"/>
Billing Country*	<input type="text" value="United Kingdom"/>

3. Check the card details are correct > Proceed

Card Details

Payment type	Visa
Card Number	XXXX XXXX XXXX 0006
Cardholder Name	Test Test
eMail	
Billing Address	Test
Billing Post Code	AB1 1AB
Delivery Address Line 1	Test
Delivery City	Test
Delivery Post Code	AB1 1AB
Delivery Country	GB

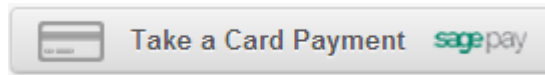
Click proceed to complete your payment. Your transaction take a few seconds to be authorised, please be patient.

Please Note: If prompted to verify the details > enter the relevant information > Submit.

A message appears advising your customer the payment has been successful and the invoice is marked as paid.

3.0 Taking payments through Mail & Telephone Order

If your Sage Pay account includes the option to take card payments by telephone or mail order, when you view an existing invoice, the following option appears:



You can also take card payments when recording:

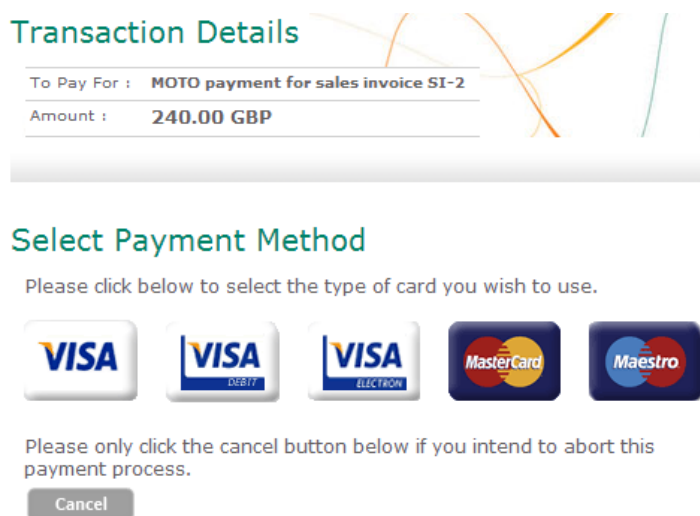
- Customer receipts
- Other receipts
- Supplier refunds through Banking only

To do this, click Banking > click your Sage Pay bank account and simply enter the receipt or refund as normal > Save > then follow from step 2 below.

Please Note: You must save the receipt or refund details before you can record the card payment.

If you record a payment but later realise it should have been recorded as a card payment through Sage Pay, you can amend this by clicking Banking > click the bank account > click the relevant transaction > Take a Card Payment then follow from step 2. The payment updates to show it's a Sage Pay transaction.

1. Sales > Sales Invoices > click the invoice you want to record the payment against
2. Record Payment > Take a Card Payment > click the payment method

The screenshot shows two sections of the Sage Pay interface. The top section is titled 'Transaction Details' and contains a table with two rows: 'To Pay For : MOTO payment for sales invoice SI-2' and 'Amount : 240.00 GBP'. The bottom section is titled 'Select Payment Method' and includes the instruction 'Please click below to select the type of card you wish to use.' Below this instruction are five buttons representing different card types: VISA, VISA DEBIT, VISA ELECTRON, MasterCard, and Maestro. At the bottom of the section is a 'Cancel' button and the instruction 'Please only click the cancel button below if you intend to abort this payment process.'

3. Enter the card details > Proceed
4. Check the card details are correct > Proceed

Card Details

Payment type	Visa
Card Number	XXXX XXXX XXXX 0006
Cardholder Name	Test Test
eMail	
Billing Address	Test
Billing Post Code	AB1 1AB
Delivery Address Line 1	Test
Delivery City	Test
Delivery Post Code	AB1 1AB
Delivery Country	GB

Click proceed to complete your payment. Your transaction take a few seconds to be authorised, please be patient.

Back

Proceed

Cancel

A message appears advising you when the payment is successful and the invoice is marked as paid. The payment appears in the bank account you chose to use for your Sage Pay transactions.

4.0 Running Sage Pay Payments Received report

The Sage Pay Payments Received report shows all payments and refunds made through Sage Pay either by the Pay Now or Mail & Telephone Order payment options.

1. Click more > Reports > Sage Pay Payments Received
2. To view transactions for a particular date range, enter the required from and to dates
3. To export the report to CSV > Download report > Export to CSV file

Please Note: Depending on your Internet browser, the file automatically downloads to your Downloads folder or you're prompted to save the file > browse to where you want to save the file > Save.

5.0 Edit or delete a Sage Pay transaction

If you need to edit or delete a Sage Pay transaction, you can do so as normal. However any changes you make may result in a difference between your Sage Pay account and Sage One Accounts Extra.

- If you delete a Sage Pay transaction from Sage One, it doesn't delete the corresponding value from your Sage Pay account.
- If you edit the amount, date or value of the Sage Pay transaction, it no longer shows as being paid through Sage Pay and no longer appears on the Sage Pay Payments Received report.
- If you unallocate a Sage Pay transaction, it still shows as being paid through Sage Pay, however if you later change any of the details as above, it doesn't