# User Manual Stripe Payments Standard

Version: Microsoft Dynamics 365 Business Central 19



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## Stripe Payments Standard – User Manual

Connect Business Central with Stripe and become part of the millions of companies using Stripe to accept payments, send payouts, and manage their businesses online.

## FEATURES

This app offers the following features:

- 1. A new way for customers to pay the Stripe Payments Standard introduces a *Pay with Stripe* link to your sales quotes, service invoices and sales invoices to allow customers to pay with a few clicks.
- 2. Reduce the time from invoice to cash The Stripe Payments Standard also allows *Automatic Collection* of payments against invoices generated from Business Central.
- 3. Payments Services now available on your Service Orders and Service Contract Invoices The Stripe Payments Standard enables Payment Service functionality on the Business Central Service Management module.
- 4. Let your international customers pay with their preferred payment method, reducing debtors' days and improving cash flow.
- 5. Simplify international trade Stripe works with financial institutions, regulators, payment networks, banks, and consumer wallets so you do not have to.
- 6. Secure payment platform Stripe's platform meets the highest certification standards to help reduce compliance burdens for your business and keep payments safe.
- 7. Affordable payment platform Stripe is a complete payments platform with simple, pay-as-you-go pricing. The Stripe Payments Standard app for Microsoft Dynamics 365 Business Central will charge a platform fee for every invoice successfully paid through Stripe. Important to note that only those Stripe Invoices created through the Business Central app will attract the new platform fee. Standard Stripe charges also apply to all transactions paid through Stripe, regardless of the source of the transaction.
- 8. Seamless integration between your Stripe balance and Dynamics 365 Business Central financial records.

## **GETTING STARTED**

Get started with the Stripe Payment Standard for Business Central in *3 EASY STEPS*:

## 1. INSTALL

Install the Stripe Payments Standard app for Business Central.

## 2. LINK YOUR STRIPE ACCOUNT

Create a new Stripe account or use your existing account.

## 3. CONFIGURE

Configure the Stripe Payments Standard service connection.

Start by making use of the Search feature in Business Central and open the *Extension Management* page, as shown below.

*Important*: This step is only relevant for Business Central sandbox tenants as external service calls will always be permitted in production tenants.

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	CRONUS UK Ltd.   Fina Customers Vendors Items Headline Want to lead	nce Cash Management Bank Accounts Chart of ATTN MOTE C	<ul> <li>Stripe ~</li> <li>Accounts</li> <li>About</li> </ul>	Tell me what you want to do Estension Management Go to Pages and Table > Estension Management Documentation	Administration	2 ×	urchase Order urchase Invoice	> New > Payments	> Reports > Setup	Excel Reports	1			
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From the Extension Management Page, click on the *Configure* action on the *Stripe Payments Standard* extension, as shown below:

55 Business Central				Q D (
Extension Management   Work Date: 1/2	26/2023			D ⊂ ,
, P Search Details Manage	More options			67
📲 Install 🗮 Uninstall 🖮 Unpu	ablish 😽 Configure 📑 Download Sour	ce 🚯 Learn More 🗮 Refresh		1
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Installed		Company Hub	v. 19.0.29894.30693	Global
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Installed	Manage	Library Assert	v. 19.0.29894.30693	Global
Installed		Library Variable Storage	v. 19.0.29894.30693	Global
Installed	÷. uteran	OnPrem Permissions	v. 19.0.29894.30693	Global
Installed	€ Uninstall	PayPal Payments Standard	v. 19.0.29894.30693	Global
Not Installed	🐳 Unpublish	Performance Toolkit	v. 19.0.29894.30693	Global
Installed	🖨 Configure	Permissions Mock	v. 19.0.29894.30693	Global
Installed	Download Source	Recommended Apps	v. 19.0.29894.30693	Global
Installed	Learn More	Sales and Inventory Forecast	v. 19.0.29894.30693	Global
Installed	Cean More	Send remittance advice by email	v. 19.0.29894.30693	Global
Installed	Manage	Send To Email Printer	v. 19.0.29894.30693	Global
Installed	📜 Select More	Simplified Bank Statement Import	v. 19.0.29894.30693	Global
Installed		Stripe Payments Standard	v. 19.0.0.1	Dev

From the Stripe Payments Standard page, enable the *Allow HttpClient Requests* option as shown below:



Once this has been configured, close the Stripe Payments Standard page, close the Extension Management page and proceed to the next step.

## STEP 2 - LINK YOUR STRIPE ACCOUNT

The Stripe Payments Standard uses web services to integrate with Stripe and the Business Central Service Connection is used to configure the integration between your Business Central company and the Stripe service.

Start by searching for *Service Connections* using the Business Central *Search* feature, then click on the Service Connections link in the search results, as shown below:

			_
ynamics 365 Business Central		Demonstration Q Q	
CRONUS UK Ltd. Fina	ance 🗸 🦳 Cash Management 🗸 🦳 Stripe	Tell me what you want to do	
Customers Vendors Items	Bank Accounts Chart of Accounts	Service Connections	
Headline		Go to Pages and Tasks	
Want to lea	arn more abou	+ > Service Connections Lists [] urchase On	
		Common Data Service Connection Setup Administration	
Business Ce	entral	Documentation Show all (20)	
0.0		© Sale of Services to Overseas Place of Supply to registered customer Sale of Services to Overseas Place of Supply to registered customer	
Activities ~		How to Work with Service Contracts and Service Contract Quotes	
Sales This Month	Overdue Sales Invoice Amount	Tou can create a service contract either manually on itom a service contract quote, rou c	
£9,607	£39,754	Publish objects as web services to make them immediately available for your Business C	
>See more	>See more	Get from Microsoft AppSource Show all (70)	
		Advaria Banking Services With Advaria Banking Services you'll be able to manage your bank connections.	
Ongoing Sales	Ongoing Purch	es SharePoint Connector Camera Incoming Documents Product Videos Create seamless connections between your data and SharePoint and automatically oen	
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Z 4	/ 5	Our service soo how emances juos adums service, and maniferrant     Oreate incomin     Product Videos     Didet find what you ware looking for? To emicroing	
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From the Service Connections page, click on the *Setup* action from the Service Connection called *Stripe Payments Standard – Fee % of Amount*, as shown below:

Dynamics 365 Business Central					Demonstration Q	¢ ۵	» ? W	
CRONUS UK Ltd.   Finance - Cash Manage	Service Connections   Work Date: 4/6/2020	0 4 2						
Customers Vendors Items Bank Accounts Ch	🔎 Search 💰 Setup 🚦 Open in Excel	⊽ ≡				r		
Headline	Name	Status		> Reports				
Want to learn more	AMC Banking Setup	Enabled	New Payments		E Excel Reports			
	Common Data Service Connection Setup	Disabled						
Business Central?	Microsoft Dynamics 365 Connection Setup	Disabled	-					
	Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount	Disabled	-					
0.	Doc. Exch. Service Setup	Disabled	-					
Activities ~	Email Accounts	Disabled						
Sales This Month Overdue Sales Invoice	GovTalk Setup	Disabled						

If you are using the Stripe Payments Standard in a Business Central demonstration company, a notification will appear, allowing you the option of creating a demonstration account with Stripe. To use a demonstration account with Stripe, click on the link appearing in the notification as shown below:

dit - Stripe Payments Standard Setup	Service Connections   Work Date: 4/6/2020		ž
× This is a demonstration company. You can speed up the setup process by creatin	g a demonstration Stripe account. Click to setup a demonstration Stripe account now.		
anage More options			
eneral			Shown
tup	Stripe Control Account Setup	Stripe Invoice Setup	
me Demo Sandbox Account - Stripe Payment	Account is the Control Account used in your financial records to reflect your Stripe balance.	Stripe Invoice Description Sales Document Posting Description	
Demo Sandbox Account - Stripe	Bank Account	Include Custom Text	
ipe Account ····· Link your Stripe Account		Stripe Invoice Custom Text	
abled · · · · · · · · · · · · · · · · · · ·		Stripe Invoice Description Preview · · · · · · Order SO-134772	
qo	I as the Payout account on your Stripe Account. This is the		
S Click to setu	p a demonstration Stripe account now.		
rms of Service https://stripe.com/			
	/		
\			
			Close

If you are using the app from a production environment, you will not have this option and the Stripe onboarding process will have to be completed (either with a new Stripe account or with your existing Stripe account).

From the Stripe Payments Standard Setup page, click on the *Setup* field and select one of the two available options:

- 1. You can Connect to your existing Stripe Account or
- 2. Create a new Stripe Account

	Stripe Payments Standard S	etup							
	Actions								
	General			Show more					
	Setup		Stripe Control Account Setup						
	Name	Demo Sandbox Account - Stripe Payments Standard	The Stripe Account is the Control Account used in your Bank Account, but you can use a G/L Account as well.	r financial records to reflect your Stripe balance. This is typically setup to be a					
	Description	Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount	Stripe Account Type	Bank Account					
	Setup	Connect my existing Stripe Account	Account No.	STRIPE					
St Ac En	Stripe Account Id	Connect my existing shipe Account Create a new Stripe Account	Stripe Account Name	Stripe Account					
	Account Status	Get an authorisation code	Stripe Reporting Category Setup						
	Enabled	•	The Stripe Reporting Category Setup is used to map the structure.	e Reporting Categories on Stripe Transactions to your own G/L Account					
	Always Include on Documents		Reporting Category Setup	11 categories configured. Click to change					
	Loga	6	Stripe Invoice Setup						
		3	Stripe Invoice Description	Sales/Service Document Posting Description					
	Terms of Service	hannen ander and	Include Custom Text						
	terms of service	mipsy/sinperconviconnect-accountviega	Stripe Invoice Custom Text						
			Stripe Invoice Description Preview	Order SO-134772					

### CONNECT TO YOUR EXISTING STRIPE ACCOUNT

To connect your existing Stripe Account to Business Central, you will perform *two* steps:

- 1. First, you will be presented with the Stripe login to select which account you want to connect to Business Central.
- 2. Next, Stripe will issue an Authorization Code and you will copy this code and provide this code to Business Central.

From the Account Status field, click on the *Get an authorization code* link, as shown below:

General		Show more
Setup		Stripe Control Account Setup
Name	Demo Sandbox Account - Stripe Payments Standard	The Stripe Account is the Control Account used in your financial records to reflect your Stripe balance. This is typically setup to be a Bank Account, but you can use a G/L Account as well.
Description	Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount	Stripe Account Type Bank Account
Setup	Connect my existing Stripe Account	Account No. STRIPE
Stripe Account Id		Stripe Account Name Stripe Account
Account Status	Get an authorisation code	Stripe Reporting Category Setup
Enabled		The Stripe Reporting Category Setup is used to map the Reporting Categories on Stripe Transactions to your own G/L Account structure.
Always Include on Documents		Reporting Category Setup 11 categories configured. Click to change
Terms of Service	http://thtps:/	thorisation code
190/?runinframe=1#		

Once logged into your Stripe Account, you will be able to select the account you want to connect, then click on the Connect button to generate the Authorization Code.

The Authorization Code will be displayed as shown below:



Copy the code from the page above and paste the value into the *Authorization Code* field on the Stripe Payments Standard Setup page, as shown below. To connect the account, press Tab or move your cursor away from the Authorization Code field once you have entered the value. The authorization will take place in the background and the Account Status will be updated to reflect a successful connection.

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	Stripe Payments Standard S	etup						
	Actions							
	General					Show mi	ve	
	Setup		Stripe Control Account Setup					
	Name	Demo Sandbox Account - Stripe Payments Standard	The Stripe Account is the Control Account used in your Bank Account, but you can use a G/L Account as well.	financial records to reflect your Stripe balance. This is typ	pically setup	o to be a		
	Description	Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount	Stripe Account Type	Bank Account				
	Setup	Connect my existing Stripe Account	Account No.	STRIPE				
	Stripe Account Id		Stripe Account Name	Stripe Account				
	Account Status	Get an authorisation code	Stripe Reporting Category Setup					
	Authorisation Code *	ac_KW1zV7cjC3nn3odw2Qwp1XNmjwAWBESZ	The Stripe Reporting Category Setup is used to map th structure.	e Reporting Categories on Stripe Transactions to your ow	m G/L Acco	unt		
	Stripe Account	Waiting for authorisation code	Reporting Category Setup	11 categories configured. Click to change				
	Enabled		Stripe Invoice Setup					
	Always Include on Documents		Stripe Invoice Description	Sales/Service Document Posting Description				
	Logo	6	Include Custom Text					
		3	Stripe Invoice Custom Text					
	Terms of Service	https://stripe.com/connect-account/legal	Stripe Invoice Description Preview	Order SO-134772				

Once your Authorization Code has been accepted, you can proceed to complete the remainder of the setups required on the Stripe Payments Standard Setup page and enable the service.

To create a new Stripe Account and link the newly created account to Business Central, follow the steps outlined below.

From the Setup field, select the option to *Create a new Stripe Account*, as shown below:

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Actic		etup				
Gen	eral				Show mo	ie i
Setu	p		Stripe Control Account Setup			
Nam	e	Demo Sandbox Account - Stripe Payments Standard	The Stripe Account is the Control Account used in your Bank Account, but you can use a G/L Account as well.	financial records to reflect your Stripe balance. This is typically s	etup to be a	
Desc	ription	Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount	Stripe Account Type	Bank Account		
Setup	p	Create a new Stripe Account	Account No.	STRIPE		
Stripe	e Account Id	Connect my existing Stripe Account Create a new Stripe Account	Stripe Account Name	Stripe Account		
Stripe	e Account	Link a new Stripe Account	Stripe Reporting Category Setup			
Stripe	e Account	Waiting for onboarding to be completed	The Stripe Reporting Category Setup is used to map the structure.	e Reporting Categories on Stripe Transactions to your own G/L A	Account	
Enab	led		Reporting Category Setup	11 categories configured. Click to change		
Alwa	ys Include on Documents		Stripe Invoice Setup			
Logo			Stripe Invoice Description	Sales/Service Document Posting Description		
		S	Include Custom Text			
			Stripe Invoice Custom Text			
Term	s of Service	https://stripe.com/connect-account/legal ····	Stripe Invoice Description Preview	Order SO-134772		

From the Stripe Account field, click on the link with the description *Link a new Stripe Account*, as shown below:

Actions				
General				Show more
Setup		Stripe Control Account Setup		
Name	Demo Sandbox Account - Stripe Payments Standard	The Stripe Account is the Control Account Back Account but you can use a G/L Account	used in your financial records to reflect your Stripe balance. This is typically se	etup to be a
Description	Demo Sandbox Account - Stripe Payments Standard - Fee % of Amo	ount Stripe Account Type	Bank Account	
Setup	Create a new Stripe Account	Account No.	STRIPE	
Stripe Account Id		Stripe Account Name	Stripe Account	
Stripe Account	Link a new Stripe Account	Stripe Reporting Category Setup		
Stripe Account	Waiting for onboarding to be completed	The Stripe Reporting Category Setup is us	ed to map the Reporting Categories on Stripe Transactions to your own G/L Ac	count
Enabled		THE STREET	11 categories configured. Click to change	
Always Include on Documents		ALCON		
Logo	S Demo	Sandbox Account - Stripe	Sales/Service Document Posting Description	
renns or service	mtps//sulpe.com/connectaccount		Order 50-134772	
	(· · · · · ·			
	Link a r	new Stripe Account		

A new window will appear to allow you to create a new account with Stripe, or login using your existing credentials and create a new sub-account.

If the new window fails to open, its possibly due to a restriction in your browser preventing pop-ups - if this is the case you can click on the pop-up blocking notification and select the option to allow the window to open.

Below is an example of a browser with a pop-up blocking restriction preventing the new window from opening:

View - Service Connections - Dyn × +		- 6 3
← → C () localhost:8080/BC160/?page=1279&company=Live%20Compan	y%20Ltd.&dc=0&bookmark=70%3beAUAAAF7YwBzAGEAXwBTAHQAcgBpAHAAZQAgAFMAdABhAG4AZABI	hahiazaagaeeaywejageadqeuahqaogagade%3d 🛛 💼 q 🖕 🧧 🖪 🐞 🗫 🥨
View-Service Connections - Dy: X +     Or Decalhood:0800/CH00/page=12798ccompany=Live%20Company      Dynamics 365 Business Central     Live Company Ltd. Finance ✓ Journals ✓     Phased Trial Balance Chart of Accounts Bank Acco HEADLINE     Hill     e     Activities     Activities     Activities     Intellement Count     Different     Different	Vex20Ltd.8dc=08bookmark=70%3beALAAAF7Yw8zAGEAXw8TAHQAcg8pAHAAZQAgAFMAdABhAG4AZABH Manage More options EDIT - STRIPE PAYMENTS STANDARD SETUP Central Stripe Payments Standard Description Stripe Payments Standard - Fee Stof Stripe Account Wating for orboarding to be com Fubled Pop-ups blocked: https://connect.st https://connect.st Aways allow pop localhosts80800 Continue blocking	haHIIAZAAgAEEAVWBJAGBAAQBuAHOAOgAgAQEN33 POp-ups blocked: Hugu/connet trainsecon/vetup/vlasBUT/bask O O O O O O O O O O O O O O O O O O O
PRICE TODAY       PRICE TODAY         D       PRICE TODAY         Insights       PRICE TODAY         Account No. 1       Name         (There is nothing to show in this view)	HMRC VAT Setup Ocifiene Map Setup UK Potode Service SMTP Mail Setup Social Engagement Setup EU VAT Reg. No. Validation Service Setup	Done S S Ifetures and integrations your needs

The new browser window will guide you through the *Stripe onboarding process*, this is a process whereby your existing Stripe account is linked to the Stripe Payments Standard feature and associated with your Business Central Company. The first step of the onboarding process is to enter your existing Stripe account login details – notice this onboarding process runs directly on the secure Stripe website. If you do not have an existing login, you can enter the email address you wish to use for a new Stripe account to be created as part of the onboarding process:

$\leftrightarrow$ $\rightarrow$ C $($ connect.stripe.com/setup/s/INNWcBz65aej		☆):
🚭 Chase Software		
Chase Software partners with Stripe for secure payments.	Get started with Stripe Please have the owner of this business or someone with significant management responsibility complete this form.	
← Return to Chase Software	Email Have a Stripe account? You can use the same email.	
	Next →	
Powered by <b>stripe</b> ① English (U5) ≎		

If you fail to complete the onboarding process or accidentally close the Stripe onboarding page, you can re-open this page by opening the Stripe Payments Standard Setup page, and *restart the onboarding process*.

The Stripe onboarding process will guide you through the setup process and upon successful completion of the process, the page below will be displayed. You can close this page and return to the Stripe Payments Standard Setup page.



Upon successful completion of the Stripe onboarding process, the Stripe Payments Standard Setup page will reflect the successful connection status as shown below:

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Stripe Payments Standard Setup         Actions         General         Setup         Name       Demo Sandbox Account - Stripe Payments Standard         Description       Demo Sandbox Account - Stripe Payments Standard         Description       Demo Sandbox Account - Stripe Payments Standard         Stripe Account Id       Connected. Click to Disconnect.         Stripe Account Id       Stripe Account Anne         Bank Account David       Stripe Account I stripe Reporting Category Setup         Anways Include on Documents       Demo Sandbox Account Least         Logo       It attegories configured. Click to change.         Stripe Payments Standard       Stripe Payments Standard - Fee % of Amount         Stripe Payments Standard - Fee % of Amount       Stripe Payments Standard - Fee % of Amount	c ,
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Server     Stripe Account is the Control Account seed in your financial records to reflect your Stripe balance. This is typically band and a fee % of Amount       Stripe Account Id     Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount       Stripe Account Id     Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount       Stripe Account Id     Connected. Click to Disconnect.       Fabiled     Stripe Account Is the Control Account seed in your financial records to reflect your Stripe balance. This is typically band account - Stripe Account I area       Anays Include on Documents     Connected. Click to Disconnect.       Logo     It aetapories configured. Click to damge.       Terms of Service     https://stripe.com/connect.account/legat       Terms of Service     It ps://stripe.com/connect.account/legat       Connected. Click to Disconnect.     Stripe Payments Standard - Fee % of Amount       Stripe Payments Standard - Fee % of Amount     Storipe Account	
Step         Stige Control Account Setup           Name         Demo Sandbox Account - Snipe Payments Standard         The Snipe Account is the Control Account used in your financial records to reflect your Stripe balance. This is typically account is the Control Account use GL Account as well.           Snipe Account Id         accut HM-P2Gber/PAW2t         Snipe Account Type         Bank Account           Snipe Account Id         accut HM-P2Gber/PAW2t         Snipe Account Type         Bank Account           Anays Include on Documents         Connected. Click to Disconnect.         Snipe Account Id         Snipe Account           Logo         The Snipe Reporting Category Setup         The Snipe Reporting Category Setup         The Snipe Reporting Category Setup           Logo         Integrates configured. Click to change.         Stripe Payments Standard         Sates/Service Document Posting Description           Integrate Connected. Click to Disconnect.         Stripe Payments Standard - Fee % of Amount         Sol-194772	Show more
Name         Demo Sandbox Account - Snipe Payments Standard         The Singe Account is the Control Account used in your financial records to reflect your Stripe balance. This is typically Bark Account but you can use a G/L Account as well.           Description         Demo Sandbox Account - Snipe Payments Standard - Fee % of Amount as well.         Bark Account         Bark Account           Stripe Account Id         accut HMHp2Gbe7/PuWat         Connected. Click to Disconnect.         Stripe Account Nume         Stripe Account           Anays Include on Documents         Image Account Is         Stripe Account Is used to map the Reporting Category Setup         The Stripe Account Is used to map the Reporting Categories on Stripe Transactions to your one G/L           Logo         Image Account Is         Image Account Is accument Payments Standard         Stripe Account Is used to map the Reporting Categories on Stripe Transactions to your one G/L           Logo         Image Account Is         Image Account Is accument Payments Standard         Stripe Reporting Category Setup           Terms of Service         Integrities configured. Click to change.         Stripe Payments Standard         States/Service Document Posting Description           Integrities configured. Click to Disconnect.         Stripe Payments Standard - Fee % of Amount         Sol-134772	
Description Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount Stripe Account Id Stripe Account Id Connected. Click to Disconnect. Stripe Account Name Stripe Account Stripe Account Name Stripe Account	setup to be a
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Stripe Account Stripe Account Name Stripe Account Enabled Converted Click to Disconnect Stripe Reporting Category Setup Aways Include on Documents The Stripe Reporting Category Setup Is used to map the Reporting Categories on Stripe Transactions to your own G/A Logo II categories configured. Click to change. The Stripe Reporting Category Setup Is used to map the Reporting Categories on Stripe Transactions to your own G/A Logo II categories configured. Click to change. The Payments Standard Stripe Payments Standard Stripe Transactions To Stripe Payments Standard - Fee % of Amount Stripe Reporting Category Setup Is used to map the Reporting Categories on Stripe Transactions to your own G/A	
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Always include on Documents The Stripe Reporting Category Setup is used to map the Reporting Category Setup is	
Logo III categories configured. Click to change Terms of Service Intros://stripe.com/connect-account/legal Sates/Service Document Posting Description Stripe Payments Standard - Fee % of Amount Stripe Connected. Click to Disconnect.	Account
Connected. Click to Disconnect.	
Connected. Click to Disconnect.	
Name Demo Sandbox Account - Snipe Payments Standard   Description Demo Sandbox Account - Snipe Payments Standard - Fee % of Amount   Snipe Account Id acc, 1HNHp2Obe/PhWzt   Snipe Account Id Snipe Account Name   Snipe Account Name Snipe Account	

## STEP 3 - CONFIGURE

The next step is to complete the *mandatory field* and the *Stripe Reporting Category Setup* from the Stripe Payments Standard Setup page.

The mandatory field is indicated with a red asterixis on the page and the Stripe Reporting Category Setup can be completed from the *Click to setup...* link as shown below:

Work Date: 1/26/2023	$\bigcirc$	+ 🗊		√Saved 🖬 🦻
Stripe Payments Standard	Setup			
Actions				
General				Show more
Setup		Stripe Control Account Setup		
Name	Demo Sandbox Account - Stripe Payments Standard	The Stripe Account is the Control Account used in your fit Back Account, but you can use a G/L Account as well.	nancial records to reflect your Stripe balance. This is	typically setup to be a
Description	Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount	Stripe Account Type	Bank Account	~
Stripe Account Id	acct_1HNHp2Gbe7rPuWzt	Account No.		~
Stripe Account	Connected. Click to Disconnect.	Stripe Account Name		
Enabled		Stripe Reporting Category Setup		
Always Include on Documents	··· •	The Stripe Reporting Category Setup is used to map the structure.	Reporting Categories on Stripe Transactions to your	own G/L Account
Logo		Reporting Category Setup	Click to setup	
	3	Stripe Invoice Setup		
Terms of Service	https://stripe.com/connect-account/legal	Stripe Invoice Description	Sales/Service Document Posting Description	~
		Include Custom Text		~
		Stripe Invoice Custom Text		
		Stripe Invoice Description Preview	Order SO-134772	

The Stripe Reporting Categories setup allows you to specify the balancing account to be used when transferring Stripe Transactions to a General Journal.

When opening the page for the first time, a default set of Stripe Reporting Categories will be created and from there you can configure the categories as you wish.

Notice the *Account No.* field is only required when the Account Type is specified as either G/L Account or Bank Account – the reason for this is the Customer No. will be derived from the Sales Document at the time of transferring the transaction to the journal.

When you are done with the setup, you can close the setup screen to return to the Stripe Payments Standard Setup page.

Dotting Categories       Image       Image </th <th></th>					
Charge     Note right     Note right     Note right     Note right       connect reserved_funds     Connect reserved funds     G(L Account     ¥       connect reserved_funds     Connect reserved funds     G(L Account     *       payout     Fee     G(L Account     *       payout     Payout     Bark Account     *       payout reversal     Payout reversal     Bark Account     *       platform_axming_refund     Platform earning refund     G(L Account     *       refund     Refund     Connect reversal     G(L Account     *       risk_reserved_funds     Risk reserved funds     Since reversal     Since reversal	Strine Category: Name *	Description Account Tune	Account No.	Account Name	
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partom gamming_reaming	platform_earning	Distance service servi	<b>↑</b>		
reading     reading     Castomer       risk_reserved_funds     Risk reserved funds     GLAcount       transfer     Transfer     Bank Account       transfer_reversal     Transfer reversal     Bank Account	platform_earning_refund	Plation earling return	<b>*</b>		
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transfer or manuer our of an Account  transfer_reversal Bank Account	risk_reserved_runds	Transfer			
transfer_reversal iransfer reversal bank Account	transfer	Transfer Bank Account			
	transter_reversal	Iranster reversal Bank Account	*		

Once you have completed the setup, you can enable the Stripe Payments Standard by click on the *Enabled* field and accepting the Terms & Conditions, as shown below:

Dynamics 365 Business Central		Demonstration Q D 🚳 ? 👿
Stripe Payments Standard St	etup	√Saved ⊂ <del>,*</del> *
X Stripe Payment Standard has been enabled. You ca Actions General	an also enable a service to retrieve Payment updates from Stripe. Club to enable this now.	
Setup Name Sripe Payme Sripe Account Enabled Alwass include on Documents Logo Terms of Service Marco Service	Stripe Control Account Setup  The Strip Account Stripe Account Setup  The Stripe Account Acco	wide:     Brige Invoice Description       Stripe Invoice Description     Seles Decument Rosting Description       Include Custom Text     Shipe Invoice Description       Stripe Invoice Description     Seles Decument Rosting Description       Include Custom Text     Shipe Invoice Description       Stripe Invoice Description Preview     Drider SO-134772

An option is available to *automatically include* the Stripe Payments Standard on all new Sales Invoices created in the current Business Central company, this will be enabled by default and can be managed as shown below:

Work Date: 1/25/2023	+ 8		√Saved ⊡ 💉				
Stripe Payments Standard Setup							
Actions							
General			Show more				
Setup	Stripe Control Account Setup						
Name Demo Sandbox Account - Stripe Payments Standard	The Stripe Account is the Control Account used in your Bank Account, but you can use a G/L Account as well.	inancial records to reflect your Stripe balance. This is	s typically setup to be a				
Description Demo Sandbox Account - Stripe Payments Standy ree % of Amount	Stripe Account Type	Bank Account	~				
Stripe Account Id	Account No.	STRIPE	~				
Stripe Account Connected. Click Disconnect	Stripe Account Name	Stripe Account					
Enabled	Stripe Reporting Category Setup						
Always Include on Documents	The Stripe Reporting Category Setup is used to map the Reporting Categories on Stripe Transactions to your own G/L Account structure.						
C	Reporting Category Setup	11 categories configured. Click to change					
3	Stripe Invoice Setup						
Terms of Service https://stripe.com/connect-account/legal	Stripe Invoice Description	Sales/Service Document Posting Description	~				
	Include Custom Text		~				
	Stripe Invoice Custom Text						
	Stripe Invoice Description Preview	Order SO-134772					

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After enabling the Stripe Payments Standard, a notification appears on the Stripe Payments Standard Setup page allowing you the option of enabling a background service to automatically retrieve transactions from Stripe.

The use and benefits of this service will be explained in the next section, but this is an optional feature and the service can be disabled at any time using the *Job Queue Entries* page in Business Central.

### MANAGING THE SCHEDULED SERVICE

The *Stripe Invoice Paid Update Service* is a recurring job scheduled through the Business Central Job Queue.

This service is designed to retrieve information from the Stripe server related to the invoices issued from Business Central. When your customer successfully completes a payment transaction using the *Pay with Stripe* link presented in the invoice document, a payment transaction will reflect on your Stripe account. This service will collect these transactions and provide up-to-date information on the Posted Sales Invoice in Business Central to reflect the successful payment.

The service is optional and keeping the service disabled will not prevent your clients from making payments using the Stripe service, but your Business Central records will not reflect successful payments on your Business Central Sales documents.

You can access the Business Central Job Queue by making use of the Search feature as shown below:

Dynamics 365 Busines	s Central								Demonstration	۹	٥	٩	? W
	CRONUS UK Ltd. Financ Customers Vendors Items	ce V Cash Management V Stripe V Bank Accounts Chart of Accounts	Tell me what you want to do Job Queue Entries		2 X					2			
	Headline		Go to Pages and Tasks						El como				
	Want to lear	rn more about	> Job Queue Entries	Lists	Д	urchase Order	> New > Payments	> Reports	E Excel Reports				
	Businoss Co	ntral2	> Job Queue Log Entries	Lists									
	DUSITIESS CE	1111 al:	Documentation	Show	w all (20)								
	0.		Posting date on value entries Learn how the Adjust Cost - Item Entries batch job	o identifies and assigns a posting da	ite								
	Activities ~		How to Delete Cost Budget Entries You use the Delete Cost Budget Entries batch job	to cancel cost budget entries from t	the	_							
	£9,607	Amount £39,754 £1	Adjust Settlement Exchange Rates for VAT Entries Use a batch job to settle VAT entries according to	(Australia) the government exchange rate in th	1e								
	>See more	>See more >Se	Get from Microsoft AppSource	Shou	w all (60)								
			Smart Job Queue Accelerate your automation journey with these Jo	b Queue improvements									
	Ongoing Sales Sales Quotes Sales Orders	Ongoing Purchases Sales Invoices Purchase Orders	Job Queue Alert Receive a notification via Email when a Job Queue	unexpectedly errors allowing the u	se	Camera	Incoming Do My Incomit	ocuments Pr	oduct Videos				
	2 4	7 5	Entries Source Names Add the Source Name column to all your Entries			Create Incomin	Documents						
		· · · · · · · · · · · · · · · · · · ·	Didn't find what you were looking for? Try exploring			from Camera			NUMBER FOR STATE				

From the Job Queue Entries page, locate the record with the Description *Stripe Invoice Paid Status Service*, as shown below.

							1 more op a	0.0				
	Status	User ID	Object Type to Run	Object ID to Run	Object Caption to Run	Description	Job Queue Category Code	User Session Started	Earliest Start Date/Time	Sched	Recurr Job	No. of Minutes between Runs
	On Hold	EUROPE\NAVSNAP	Report	1511	Delegate Approval Requests	Auto-created for sending of delegated			9/29/2020 2:02 PM		5	1440
	Ready	EUROPE\NAVSNAP	Codeunit	6700	O365 Sync. Management	Auto-created for retrieval of new data f			10/2/2020 12:10 PM	53	- 61	1440
	On Hold		Codeunit	5918	ServOrder-Check Response Time				8/29/2020 8:00 AM		- 63	60
	Ready	EUROPE\NAVSNAP	Codeunit	459	Remove Orphaned Record Links	Remove orphaned record links			10/28/2020 1:02 PM	13	- 61	43200
->	Ready	WIECHARDT-HP\WIECHARDT	Codeunit	70479143	csa_Stripe Job Queue	Stripe Invoice Paid Status Service			10/1/2020 2:14 PM			15

From this page, you can maintain the service as you would with any other Schedule Job in Business Central. It's also possible to delete the Job altogether and re-create it with your own set of preferences on scheduled execution to increase or decrease the frequency of execution.

If this service is not visible on the Job Queue Entries page it is an indication that the service has not been scheduled yet. To schedule the service, re-open the Stripe Payments Standard Setup page, as shown below:

Dynamics 365 Busine	ess Central		Demonstration Q D	©? 🖤
	CRONUS UK Ltd. Finar	nce $\vee$ Cash Management $\vee$ Stripe $\vee$	Tell me what you want to do 2° X	
	Customers Vendors Items	Bank Accounts Chart of Accounts	Stripe Payments Standard	
	Headline		Go to Pages and Tasks	
	Want to lea	irn more about	Stripe Payments Standard Accounts     Administration     urchase Order     New     New     Reports     Excel Reports     urchase Invoice     Payments     Setup	
	Rusiness Ca	ntral?	Documentation Show all (20)	
	DUSITIESS CE		WorldPay Payments Standard     Provides information about the WorldPay Payments Standard extension	
	0.		① Using the PayPal Payments Standard Extension Describes how to use the extension to enable customers to make payments with PayPal.	
	Sales This Month	Ouerdus Sales Invision Oue	How to Export Electronic Payments     In Duciness Central you can another initial antriaciate a file format according	
	f0.607	Amount Am	Get from Microsoft AnnSource Get Show all (57)	
	£9,007	I39,734 I	Stripe Payments Standard	
	>See more	>See more >S	Se Now you can offer your customers a new way to pay WorldPav Payments Standard	
	Ongoing Sales	Ongoing Purchases	Get paid faster by adding a link to the WorldPay Payments Standard on invoices. s Camera Incoming Documents Product Videos	
	Sales Quotes Sales Orders	Sales Invoices Purchase Orders	PayPail Payments Standard Adds a PayPail link to your sales documents so customers can easily pay using PayPail.  My incoming Documents	
	2 1	7 5	Didn't find what you were looking for? Try exploring	

From the Stripe Payments Standard Setup page, click on the *Click to enabled this now* action in the notification appearing at the top of the page to schedule the service. Note: You will need permission in the Business Central environment to schedule this service.

Stripe Payment Standard As been enabled. You can also enable a service to retrieve Payment updates from Stripe. Cick to enable this now. Actions  Ceneral  Stripe Payment Standard  Stripe Payment S		<ul> <li>+</li> <li>•</li> </ul>	√Saved ⊑	*
X Stripe Payment Standard has been enabled. You can also enable as service to retrieve Payment updates from Stripe. Click to enable this now.         Actions         Stripe Control Account Setup         The Stripe Account is the Control Account Setup         The Stripe Account is the Control Account Setup         Stripe Payment Standard - Fee Nor Annount         Stripe Payment Standard - Fee Nor Annount         Stripe Account No.         Stripe Account No.         Stripe Payment Standard - Fee Nor Annount         Stripe Account No.         Stripe Account No.         Stripe Account No.         Stripe Account No.         Stripe Payment Standard - Fee Nor Annount         Stripe Account No.         Stripe Account No.         Stripe Account No.         Stripe Payment Standard - Fee Nor Annount         Stripe Account No.         Stripe Account No.         Stripe Payment Standard - Fee Nor Annount         Stripe Account No.         Stripe Account No.         Stripe Payment Standard - Fee Nor Annount         Stripe Payment Account No.         Stripe Payment Standard No. <td>stripe Payments Standard Setup</td> <td>Ŭ</td> <td></td> <td></td>	stripe Payments Standard Setup	Ŭ		
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Series     Stipe Control Account Setup     Stipe Control Account Setup     Stipe Invoice Setup     Stipe Invoice Setup       ame     Stipe Agyments Standard     The Stipe Account is the Control Account Setup     The Stipe Account is the Control Account Setup     Stipe Invoice Setup     Stipe Invoice Setup     Stipe Invoice Setup     Stipe Account as well.       breach     Connected. Click to Disconnect.     Stipe Account Num     Stipe Account Num     Stipe Account Account Setup     Stipe Account Num     Stipe Account Num <td>ctions</td> <td>Construction Construction</td> <td></td>	ctions	Construction Construction		
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ame     Stripe Payments Standard     The Stripe Account is the Cortod Account is the Cortod Account is end.     Stripe Invoice Description     Stripe Invoice Description     Stripe Invoice Description       Description     Stripe Account is the Cortod Account is the Cortod Account is end.     Invoice Cortod Account is end.     Invoice Outcoments     Invoic	etup	Stripe Control Account Setup	Stripe Invoice Setup	
Description     Stripe Payments Standard - Fee % of Amount     Stripe Acount     Include Custom Text     Include Custom Text       Tripe Acount     Connected.     Click to Disconnect.     Account No.     STRIPE     Stripe Invoice Custom Text       Anabled     Connected.     Click to Disconnect.     Stripe Account No.     Stripe Account     Stripe Account       Waves Include on Documents     Connected.     Stripe Payments Standard - Fee % of Amount     Stripe Payments Standard - Fee % of Amount     Connected.       Good     Stripe Account No.     Stripe Account No.     Stripe Account No.     Connected.       Good     Stripe Payment Account Stepp     Stripe Payment Account Stepp     Connected.     Creder So-134772       Good     Stripe Payment Account Stepp     Stripe Payment Standard - Fee Account No.     CredCONG       Stripe Pay- out Stank Account Name     CredCONG     Stripe Payment Standard - Fee Account Name     Creder So-134772       Text Stripe Payment Standard Stripe Payment Stripe Account Name     CredCONG     Stripe Pay-out Stank Account Stepp     Fee G(I. Account Name     Creder So-134772	Stripe Payments Standard	The Stripe Account is the Control Account used in your financial records to reflect your Stripe balance. This is typically setup to be a Bank Account, but you can use a G/L Account as well.	Stripe Invoice Description Sales Document Posting Description	
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nubbled     Stripe Account Name     Stripe Account Name     Stripe Account Name     Stripe Account Name     Order SO-134772       oppo     Stripe Royout Account Setup     This section is the Bank Account defined at the Payout account non surplice defects apay-out to your Bank Account.     None SO-134772     Order SO-134772       emms of Service     https://stripe.com/connect-account/legal      CHECONS     Stripe Invoice Description Preview     Order SO-134772       emms of Service     https://stripe.com/connect-account/legal      CHECONS     Stripe Invoice Description Preview     Order SO-134772       emms of Service     https://stripe.com/connect-account/legal      CHECONS     Stripe Invoice Description Preview     Order SO-134772       emms of Service     https://stripe.com/connect-account/legal      CHECONS     Stripe Invoice Description Preview     Order SO-134772	tripe Account Connected. Click to Disconnect.	Account No. STRIPE	Stripe Invoice Custom Text	
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erms of Service	S	Account No. CHECKING		
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Fee G/L Account No	mpay/ampiconyconnect accountinger	Stripe Fee Account Setup	Constraint      Constrain	
		Fee G/L Account No		
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## THE STRIPE MENU IN BUSINESS CENTRAL

The Stripe integration with Business Central handles four sets of data, all of which are accessible from your own Stripe Dashboard (provided you have access to the Stripe account) as well as from the *Stripe menu* in Business Central, these are:

- 1. Your Business Central Customers are created as *Stripe Customers*.
- 2. Your Business Central Sales Documents are created as *Stripe Invoices*.
- 3. Payments received from Customers through Stripe are retrieved from Stripe and displayed in the *Stripe Receipts & Payouts* page in Business Central.
- 4. Pay-outs received from Stripe into your own Bank Account are retrieved from Stripe and displayed in the *Stripe Receipts & Payouts* in Business Central.

The image below shows the new Stripe menu accessible from Business Central from where you can access Stripe Customers, Stripe Invoices and Stripe Receipts & Payouts.

Dynamics 365 Busines	ss Central						Dem	onstration Q (	۵ ۵	? 🖤
	CRONUS UK Ltd.	Finance $\lor$ Cash Management $\lor$	Stripe Sales Purchasing Stripe	Setup & Extensions ~ Intell	igent Cloud Insights ~					
	Stripe Customers Stripe In	voices Stripe Receipts and Payouts						-10		
	Headline			Actions						
	Want to le	ean more	out	+ Sales C + Sales C	Quote + Sales Invoice + Order + Purchase Quote +	Purchase Order > New     Purchase Invoice > Paymen	> Reports E Ex ts > Setup	cel Reports		
	Business (	Central?								
	Activities ~									
	Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue						
	£9,607	£39,754	£35,196	0						
	>See more	>See more	>See more	>See more						
	Ongoing Sales	Ongoin	g Purchases	Payments		Camera Incomi	ng Documents Product Vide	eos		- 1
	Sales Quotes Sales Orde	ers Sales Invoices Purch	Ise Orders Ongoing Purch Purch. Inve Invoices Next Week	bices Unprocessed Payments	Average Collec Outstanding V Days	My In Docum	nents			
	2 4	5	30	1	5.9 13	Create Incomin from Camera	Product Videos	s		
	→ →	> >	> >	<u>&gt;</u>	>	>				
	User Tasks	Email Status	Approvals		Self-Service					
	My User Tasks	Email Status	Approvals		Time Sheets Pending	Time Sheets				
	Pending User Tasks	Failed Emails in Outbox Outbox	Sent Emails Last Requests Ser 30 Days Approval	nt Requests to Approve	Open Time Submit Sheets Sheets	tted Time Rejected Time A Sheets Si	pproved Time heets			
	0	0 0	0 0	0	0 0	0	)			
	>	> >	>	>	>	>				

Stripe Invoices can be generated from Draft Sales Invoices or from Posted Sales Invoices, depending on your business needs.

Business Central allows multi-currency trading on a single Customer, but the Stripe billing engine has a restriction to only allow invoices of the same currency on a single Stripe Customer. For this reason, a single Customer record in Business Central can have *multiple Stripe Customer* records associated with the Business Central Customer and the Stripe integration engine will take care of this mapping and Stripe Customer creation process.

## CREATING A NEW SALES INVOICE

Now that we have successfully enabled the Stripe Payments Standard and configured the Payments Standard to be included on all new Sales documents, let us create a new Sales Invoice.

Stripe supports two options regarding the collection of monies for an invoice, these are:

1. Send Invoice

With this option, Stripe will generate a unique payment link for the invoice and your customer has the option to make payment against the invoice from the unique payment link.

This is the payment link that will appear on your document when you send it to your client.

Stripe will automatically email the Stripe Invoice to the email address defined on the Stripe Customer once the Invoice has been paid.

In Business Central, more flexibility is offered in this regard – you can select one of the following options:

- 1. Integrated Stripe will send invoice once paid
- 2. Integrated Stripe will not send invoice

### 2. Charge Automatically

Stripe can automatically attempt to pay an invoice if the customer has a payment method on file. Where an invoice is set to be charged automatically, a charge is attempted about an hour after the invoice's creation.

To enable this option on the Customer in Business Central, select the Stripe Collection Method called "Integrated – Stripe will charge automatically".

You can define the default *Stripe Collection Method* on the Customer Card from the Payments tab as shown below:

Dynamics 3	165 Business Central	Q D @	? 🕻
¢	Customer Card   Work Date: 1/26/2023 🖉 + 🗃 27090917 · Zanlan Corp.	√ Saved ⊏ <sub>अ</sub> ≮	
	New         New Document         Approve         Request Approval         Prices & Discounts         Navigate         Customer         Actions         Related         Reports         Fewer options           General>	Details     Attachments (0)	
	Address & Contact > ZA-2500 Mr. Denk Stenerson	Customer Picture >	
	Payments Show more		
C	Payment lems Loade 1114(6U) Shippe will shad invoice once paid Integrated - Stripe will and invoice once paid Integrated - Stripe will and result on the shad of the shad	Sell-to Customer Sales History Customer No. 27090917	0
		0 0 0 Ongoing Sales Guotes Blanket Oriders Origins	
		0 0 0 Origoing Sales Invoices Return Orders Credit Memos	
		0 0 0 Posted Sales Shpments 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	
		U Posted Sales	

Newly created Sales documents will apply the default from the Customer to the Sales document from where you will be able to manually set the Collection Method on an individual Sales document level.

*Important:* A Business Central Customer must be setup with an email address in other for the integration between Business Central and Stripe to work. When multiple email addresses are specified in the E-Mail field on the Customer Card, the first email address will be used to create the Stripe Customer.

Now let us proceed with the steps to create a new Sales Invoice.

A newly created Sales document, such as a Sales Invoice, will automatically include the Stripe Payments Standard when the Stripe Payments Standard has been configured to be included by default, as shown below:

	Sales Invoice   Work Date: 4/6/2	020					Ø	) + 🛙			χ.			√Saved ⊑	×*
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	Posting Prepare Invoice	Release	Request Ap	proval Navigate	Actions Rela	ated Fewer options					1	16			C
	General >											Alpine	Ski House 4/6/2020	5/6/2020 Open	
	Ø	Ē													
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		ctal Excl. VAT (GBP)													
	Subtotal Excl. VAT (GBP)	tal Excl. VAT (GBP) · · · · · 2,068.50 iscount Amount Excl. VAT (GBP) · · 0.00				Invoice Discount %				0	Total VAT (GBP)			103.43	1
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	Invoice Details												Show less	55	
		_													-
	Currency Code					Payment Method Code		BANK		<b>∠</b> ≚	Customergro			~	1
	Shipment Date	4	6/2020		<u></u>	EU 3-Party Trade					P scount % · · · · · ·			2	2
	Prices Including VAT	• • • • • • • •	$\supset$			Payment Service		Stripe Payments Stand	dard Demo Sa			4/14/202	<b>C</b>		
	VAT Bus. Posting Group	D	OMESTIC		$\sim$			Sandbox Account - Wo	rldPay Payments	N	Direct Debit Mandate ID			~	1
	Payment Terms Code		V(8D)		~			Standard			Location Code			~	ä l
						Department Code				~					- 1
	Shipping and Billing													Show more	
	Shipping and bining													21041101	-

It's also possible to manually define which Payment Services are to be made available to your client on an individual document level by clicking on the Payment Services button, then enabling or disabling one or more Payment Services from the available Payment Services list, as shown below:

Posting Prepare Invoice Rele	ase Request Approv	al Navigate	Actions	Related	Fewer opti	ions											
General >												Alpine Si	ki House 4/6/2020	5/6/2020 Open			
Harry Manager Line Oreg	Faure antians																
Lines Manage Line Page	rewer options																
Type → Resource	No. De JNDA Lin	scription da Martin	Edit -	- Select F	Payment S	Service				$\mathcal{Z}$ ×	unt Excl. VAT 2,068.50	Qty. to Assign 0	Department Code	Customergroup Code			
				Available	Name Stripe Demo	Payments Standard	l - PayPal Payments Stan	Description Stripe 1 45 lard Demo Sandb, Acco	unt - Pays	ount nts Standa							
Subtotal Excl. VAT (GBP)			$\rightarrow$		: Demo	Sandbox Account -	WorldPay Payments S	an Demo Sandbox Acco	unt - Use the Wor	· Paym				103.43			
Inv. Discount Amount Excl. VAT (GBP)											3P) · · · · · · · · · ·			2,171.93			
Currency Code			Set Up	Payment Ser	arvices						inde			Show less			
Shipment Date	4/6/2020								ок	Ancel	t % · · · · · · ·			2			
Prices Including VAT							Account - DouDo	Doumonts Standard Domo			te	4/14/2020					
VAT Bus. Posting Group	DOMESTIC						Sandbox Accourt	t - WorldPay Payments		Direct Debit M	andate ID						
Payment Terms Code	1M(8D)			~						Location Code							
				De		16											

With the Stripe Payment Service enabled on the Invoice and the Collection Method defined, we have two options:

- 1. We can send a Draft or Pro Forma Invoice to the Customer or
- 2. We can post the Draft Invoice and only send the Posted Sales Invoice to the Customer

The Stripe Payments Standard app supports *both options* listed above without the need for the user capturing or posting the invoice to be concerned with the scenario at play. This means the app supports your business process, whether it is to send invoices for payment before posting, or first posting an invoice and then sending it for payment, you can follow your existing process.

In this scenario, we want to Customer to pay the invoice before it gets posted in our financials. This can be done by printing, emailing or saving the Sales Invoice report – at the time of producing the Sales Invoice report, a Stripe invoice will be created, and the Stripe payment link will appear on the sales document.

*Important:* The Stripe payment link is generated by the Business Central Payment Service functionality and for this process to be successful, the *report design* must include the Payment Service functionality and the *report layout* has to include the Payment service section to display the payment service link(s).

Please ensure the report defined as the Draft Sales Invoice report fulfills both these requirements to ensure successful display of the payment service link(s). You can confirm the report configured as the *Draft Sales Invoice* report by opening the *Report Selection – Sales* page, as shown below.

Start by using the Search feature to find the *Report Selection – Sales* page, illustrated below:

365 Business Central						Demonstratio	ଦାର 🗘 🚳	
Sales Invoice   Work Date: 4/6/2020		Tell me what you want to do	2.5	<			√Saved 🖾 💉	
102226 · Alpine Ski I	House	Report Selections - Sales						
Posting Prepare Invoice Rele	ase Request Approval Navigate Action	Re Go to Pages and Tasks						
∮ Functions ∨ Request Approval	✓ * Posting ✓	> Report Selection - Sales	Administration	1			-12	
		Documentation	Show all (2	0				
Lines Manage Line Page	Fewer options	⑦ How to Include Company Registration Numbers of Company Re	on Sales Reports and Purchase Reports				5	
		When generating certain sales reports and purcha	ase reports, you can print registration				Customergroup	
Type	No. Description	<ul> <li>Setting Up Reports to Print on Specific Printers Learn about specifying a printer for a report and a</li> </ul>	using the Printer Selections page.	ount % Line Amount Excl. VA1	Qty. to Assign	Department Code	Code	
-7 Resource	INDA Linda Martin	How to Print Sales and Purchase Invoice Books The Sales Invoice Rook report and Purchases Invo	ice Book report allow you to check all	2,008.34	, 0			
		Get from Microsoft AppSource	Show all (27	0				
Subtotal Excl. VAT (GBP)	2,06	50 Pay On Sales Order Record payments directly on your sales orders.		Total VAT (GBP)			103.43	
Inv. Discount Amount Excl. VAT (GBP)		00 Power BI Gold Sales Data Connector Ready-made Power BI sales reports, direct from N	ficrosoft Dynamics 365 Business Central.	Total Incl. VAT (GBP)			2,171.93	
		Multiple Report Layout Selector						
Invoice Details		Automatic report layout selection for Microsoft D	ynamics 365 Business Central				Show less	
Currency Code		Didn't find what you were looking for? Try exploring		Customergroup Code				
Shipment Date	4/6/2020	EU 3-Party Trade		Payment Discount %			2	
Prices Including VAT		Payment Service Stripe Payme	ents Standard	Pmt. Discount Date	4/14/2020			
VAT Bus. Posting Group	DOMESTIC			Direct Debit Mandate ID				
Payment Terms Code	1M(8D)			Location Code				
		Department Code						
al								
Snipping and Billing							Show more	
Ship-to	Default (Sell-to Address)	Bill-to     Default (Cus	stomer) 👻					
Contact · · · · · · · · · · · · · · · · · · ·	lan Deberry							

From the *Report Selection – Sales* page, select the *Draft Invoice* option from the dropdown provided, as shown below:

Dyn	amics 36	55 Business	Central				Demonstration Q D	? 🛛
l	~	Report Sele	tion - Sales   Work Date: 4/6/2020				√Saved ∏ ⊂⊄ y*	
		Usage ·····					Draft Invoice	a
							Quote	1
		Manage	Dpen in Excel				Blanket Order	
							Order	
			Sequence 1		Report ID	Report Caption	Invoice	
		$\rightarrow$	1	1	70479085	Draft Invoice with Payment	Work Order	
							Return Order	
							Credit Memo	
							Shipment	
							Return Receipt	
							Sales Document - Test	
							Prepayment Document - Test	
							Archived Quote	
							Archived Order	
							Archived Return Order	
							Pick Instruction	
							Customer Statement	
							Doff Invice	
							Pro Forma Invoice	1 8
							Arrhived Banket Order	
								4 B

Ensure the report selected in the Report ID field supports the Payment Services. If you are unsure about the capabilities of the report currently selected in your configuration you can opt to use the *Draft Sales Invoice with Payment Services* report provided as part of the Stripe Payments Standard app for Business Central – this report is shown in the illustration below. Once configured, close the Report Selection page.

Dynamics 3	65 Busine	ess Central								Demonstration Q	۵	Ø	? 👿
÷	Report Se	election - Sales   Work Date: 4/6/2020								√ Saved	0 0	×*	- 1
	Usage · ·					Draft Invoice						~	
	Manage	Open in Excel										7	
		Sequence †			Report ID Report Caption		Use for Email Body	Use for Email Attachment	Email Body Layout Description				
	$\rightarrow$	1	1	7047	79085 🗸 Draft Invoice with Paymer	nt Services			_				
				10.1 10380 74479073 → 70479075 99000753	Object Caplion waters of vote the synthest Practices Create Journal from Stripe Receipts Dro Forma Invoice with Psymeet Series Pro Forma Invoice with Psymeet Ser Quantity Splosien of BOM	and Payouts vices							

From the Sales Invoice page in Business Central, click on the *Actions* menu, select Posting and click on the action to print the Draft Invoice.

Sales Invoice   Work Date: 4/6/2020				G	) + •							√ Saved	<b>.</b> .
102226 · Alpine Ski ł	House			C								- Junca	
Posting Prepare Invoice Rele	ase Request Approval Navigat	te <u>Actions</u> R	elated Fewer options										0
∮ Functions ∨ Request Approval	✓												4
	🖬 Post												
Lines Manage Line Page	Post and New												62
	🐚 Post and Send				Ling of Maaqure							Customeraroun	
Type	No. 🔯 Preview Posting		Location Code	Quantity	Code	Unit Price Excl. VAT	Line D	Discount %	Line Amount Excl. VAT	Qty. to Assign	Department Code	Code	
→ Resource	Draft Invoice			21	HOUR	98.50			2,068.50	0			
	K Pro Forma Invoice												
	Test Report												
Subtotal Excl. VAT (GBP)	Remove From Job Queue	2,068.50	Invoice Discount %				0	Total V	AT (GBP)			10	3.43
Inv. Discount Amount Excl. VAT (GBP)	Attach as PDF	0.00	Total Excl. VAT (GBP)				2,068.50	Total In	icl. VAT (GBP)			2,17	1.93
Invoice Details												Sho	w less
Currency Code		~ …	Payment Method Code		BANK		$\sim$	Custon	nergroup Code				$\sim$
Shipment Date	4/6/2020		EU 3-Party Trade					Paymer	nt Discount % · · · · ·				2
Prices Including VAT			Payment Service		Stripe Payments Standa	rd		Pmt. Di	iscount Date	4/14/2020			00
VAT Bus. Posting Group	DOMESTIC	$\sim$						Direct I	Debit Mandate ID · · ·				$\sim$
Payment Terms Code	1M(8D)	$\sim$						Locatio	n Code · · · · · · ·				$\sim$
			Department Code				$\sim$						
Shipping and Billing												Show	more
Ship-to	Default (Sell-to Address)	~	Bill-to		Default (Customer)		~						

From the report request window, make use of the action button at the bottom of the window to save, print or preview the report, as shown below:

365 Business Central		Demonstration Q 🗘 🔘
Sales Invoice   Work Date: 4/6/2020	(2) + 8	√Saved ⊡ x <sup>≮</sup>
102226 · Alpine Ski House		
Posting Prepare Invoice Release Request Approval Navigate Actions Related	Draft Invoice with Payment Services	0
General		Albine Ski House 4/6/2020 S/6/2020 Open
	Printer (Handled by the browser)	The second secon
Lines Manage Line Page Fewer options	Options	8
Type No. Description	Archive Document	Discount % Line Amount Excl. VAT Qty. to Assign Department Code Code
Resource		2,068.50 0
	Filter: Draft Invoice	
	× Document Type · · · · · · · Invoice · · ·	
Subtebul Evel 1/47 //SDD	× No	Total 1/AT /(SPD
Inv Disrount Amount Furl VAT (GRP)	× Bill-to Customer No. · · · · · · · · · 40000 · · ·	Total Ind. V&T (GP)
	× Sell-to Customer No. · · · · · · · · · · · · · · · · · · ·	
Invoice Details	× No. Printed · · · · · · · ·	Show less
	+ Filter_	
Shinmant Data	Filter totals by:	Payment Discount %
Prices Including VAT	+ Filter	Pmt. Discount Date
VAT Bus. Posting Group		Direct Debit Mandate ID
Payment Terms Code · · · · · · · · · · · · · · · · · · ·	Advanced	Location Code · · · · · · · · · · · · · · · · · · ·
D	Advanced /	
	Sand to Print Previou	
Shipping and Billing	Stend toni	Show more
Ship-to Clefault (Sell-to Address)	l-to vilt (Customer)	
Contact · · · · · lan Deberry		

Notice the Stripe payment link appearing on the report, as shown below. This will allow your Customer to process a payment against this invoice through Stripe.

*If you don't see the Stripe Payment Link* on your Sales Document, confirm you have an E-Mail address specified on your Customer Card in Business Central.

When your customer opens the invoice and clicks on the *Pay with Stripe* link, it will present your customer with a Stripe Payment Page, as shown below.



*It's important to note* that the payment methods made available to your customer on this page depends on the payment methods enabled on your Stripe account. You can read more about the process of enabling multiple payment methods on your account on this this help page from Stripe: https://support.stripe.com/questions/activate-a-new-payment-method

*Another important note* is when the *Stripe Collection Method* on the Sales Invoice is set to Charge Automatically, Stripe will attempt to collect payment for the invoice as defined by the Stripe Automatic Charges functionality and your Customer will not have to process payment against the invoice using the payment link provided on the invoice.

Upon successful completion of the payment process, your customer will be presented with a page to confirm the successful payment and allow your customer to download the invoice and receipt in PDF format, see example below.

The format and layout of the Stripe Invoice and Stripe Receipt documents can be adjusted from your Stripe Account Settings, more information on this can be found on this help page from Stripe: https://stripe.com/docs/billing/invoices/customize

Pay CRONUS LIK Ltd. Invoice #AC × +		- Ø ×
← → C		x) 📆 🖬 🗃 🛪 😗 E
	CRONUS UK Ltd.	
	Payment successful £2,171.93	
	Date paid November 27, 2020	
	View invoice details > Download $\psi$	
	This is a test invoice. You can test paying it using the card number 4242 4242 4242 arandom CVC number, any expiration date in the future, and a random ZIP code.	
	Powered by stripe Terms Privacy	

Once an invoice has been settled in full, your customer can continue to access this page using the same link provided on your posted sales invoice document, in other words, once the invoice has been paid, the customer will no longer be presented with the option to pay this invoice but instead a payment confirmation will be displayed.

Also note on the Sales Invoice document in Business Central, the Stripe Invoice No. appears as a field in the General section of the document, as shown below.

Sales Invoice   Work Date: 4/6/2020					🥟 + 🗈			√Saved □ ,
102226 · Alpine Ski	House							
Posting Prepare Invoice R	elease Request Appro	val Navigate	Actions I	Related Fewer options				1
General								Show less
Customer No.	40000		~	Contact · · · · · · · · · · · · · · · · · · ·	lan Deberry		Status Open	
Customer Name	Alpine Ski House			Your Reference			Work Description	
Sell-to				Document Date	4/6/2020	<u></u>		
Address · · · · · ·	Walter-Gropius-Stra	sse 5		Posting Date	4/6/2020			
Address 2	Park Stadt Schwabir	g		Due Date · · · · · · · · · · · · · · · · · · ·	5/6/2020			
City				Stripe Invoice No.	ACE7EE8F-0001			
Post Code	DE-80807			Stripe Payment Amount			pen details for "Stripe Invoice No." "ACE7EE8F-0001"	
Country/Region Code	DE		$\sim$	External Document No.				
Contact No.	CT000007			Salesperson Code	PS	~		
Phone No.				Campaign No.				$\geq$
Mobile Phone No.				Responsibility Center		it c	Date	
Email	alpine.ski.house@co	intoso.com		Assigned User ID		ing Dat	4/6/2020	
						ting bat	4/0/2020	
Lines Manage Line Pi	ge Fewer options					Due Date ···	5/6/2020	
					Unit of Measure	Stripe Invoid	e No. ACE7EE8F-0	0001 pergroup
Type III :	No. D	escription nda Martin		Location Code Qu	antity Code	Unit Price B	ant Amount	
						Shipe ruyin		
						External Do	cument No.	
						Salesperson	Code ····· PS	/
Subtotal Excl. VAT (GBP)			2,068.50	Invoice Discount %				103.43
Inv. Discount Amount Excl. VAT (GBP)			0.00	Total Excl. VAT (GBP)		mpaidu iv		2,171.93
entral.dynamics.com/00c89136-4b27-4	191-84f6-7fb7c5531c4f/De	monstration?runinfr	ame=1#			sibili	ty Center	

The last step in the process is to post the Sales Invoice. *It's worth noting* that the Stripe Invoice associated with the Sales Invoice will be transferred to the Posted Sales Invoice and the link between the Sales document will remain in place through the posting process.

In this scenario, we want to Customer to pay from the Posted Sales Invoice. If you generated a payment link from the draft invoice and then posted the invoice, the payment link will remain valid whether it has been generated from a draft invoice or a posted invoice – this means your process will not impact the effectiveness of the app.

## a. With the *Stripe Collection Method* set to either *Integrated – Stripe will send Invoice once paid* or *Integrated – Stripe will not send Invoice*:

When posting an invoice and producing the posted sales invoice report (either emailing the report, saving it or running it in preview mode), a Stripe payment link will be generated and displayed on the report, provided the Stripe Payment Service is enabled, activated on the document and the report layout supports the Business Central Payment Services functionality.

### b. With the *Stripe Collection Method* set to *Integrated – Stripe will charge Automatically*:

When posting an invoice with the Stripe Collection Method set to Integrated – Stripe will charge automatically, a Stripe invoice will be created at the time of posting the Sales Invoice and Stripe will initiate the automatic charge feature to attempt collection against the Posted Sales Invoice, provided the Stripe Payment Service is enabled on the document.

## CREATING A NEW SERVICE INVOICE

The Stripe Payments Standard functionality also allows Stripe Invoice to be created from your Service Invoices – Service Invoices can be generated either from Sales Orders or from Service Contracts.

A newly created Service Order or Service Invoice document will automatically include the Stripe Payments Standard when the Stripe Payments Standard has been configured to be included by default, as shown below:

Warehouse Drint/Send Releas	Posting ()	Inder Navinati	More options		61								G
Hereing and Hereing	e rosting o	noci norigui	Contact Name	Ian Deberry			Release S	tatus · · · · · · ·	Open			① Details II Attachments (0)	
			Phone No.		/								
				_///								Sell-to Customer Service History	
Lines Manage Line Fi	nctions Order	Fewer option	S	_///_							63	Customer No.	40000
Service Item No. Item No.	Service Item Group Code	Serial No.	Description	Re <sup>r</sup> itus Ce	War	Contract No.	Service Price Group Code	Fault Code	Resolution Code	Priority	Response Tir (Hou	0 1 0	0
→										Low		Quater Order Invoices Cred	t Memor
<											•	Pant Pant Credit	
Invoicing											Show more	Shipments Pstd. Invoices Memos	
			Colorence Code				Designed	and code	DANK			Service Item Line Details	
Bill-to Costorner No.	007	· · · ·	Posting Date	P3			Direct De	hit Mandata ID	DAIWN		* 	Service Item No.	
Bill-To			Document Date	4/12/2021			Currency	Code				Component List	0
Name Alpine	Ski House		Department Code				Prices Inc	luding VAT				Troubleshooting	0
Address ······ Walte	r-Gropius-Strasse 5	5	Customergroup Code			~	VAT Bus.	Porting Group	EU		~	Skilled Resources	0
City · · · · · · · ·			Payment Terms Code	1M(8D)			Stripe Co	lec tethod -	Send In	voice	~		
County ·····			EU 3-Party Trade	•			1000 C		Demo S	andbox Account -	Stripe		
Post Code · · · · · DE-80	807		Due Date · · · · · · · · · · · · · · · · · · ·	5/12/2021				111	Paymen	ts standard			
Country/Region Code · · · · DE		$\sim$	Payment Discount %			2							
Contact · · · · · · lan De	berry		Pmt. Discount Date	4/20/2021		<b></b>							
Shipping >										DE-80607	Ian Deberry		

It is also possible to manually define which Payment Services are to be made available to your client on an individual document level by clicking on the Payment Services button, then enabling or disabling one or more Payment Services from the available Payment Services list.

*It is important to note* that the only Payment Service currently supported in the Service Management module is the Stripe Payments Standard service.

With the Stripe Payment Service enabled on the Service Order and the Collection Method defined, we can proceed to post the Service Order. Posting a Service Order will automatically post a Service Invoice if there are Service Item Lines eligible for Invoice.

Upon posting the Service Invoice (either from a Service Order or directly from the Service Invoice page), the following will apply:

a. With the Stripe Collection Method set to Integrated – Stripe will send Invoice once paid or Integrated – Stripe will not send Invoice:

When posting an invoice and producing the posted service invoice report (either emailing the report, saving it or running it in preview mode), a Stripe payment link will be generated and displayed on the

report, provided the Stripe Payment Service is enabled, activated on the document and the report layout supports the Business Central Payment Services functionality.

b. With the Stripe Collection Method set to Integrated – Stripe will charge Automatically:

When posting an invoice with the Stripe Collection Method set to Integrated – Stripe will charge automatically, a Stripe invoice will be created at the time of posting the Service Invoice and Stripe will initiate the automatic charge feature to attempt collection against the Posted Service Invoice, provided the Stripe Payment Service is enabled on the document.

## CREATING A NEW SALES QUOTE

The Stripe Payments Standard functionality allows Stripe Invoice to be created from your Sales Quotes. You can print the Sales Quote, present the Sales Quote to your customer for payment by offering a *Pay with Stripe* link on the Sales Quote and then convert the Sales Quote to a Sales Order or a Sales Invoice to be posted.

The link between the Sales Quote and the Stripe Invoice will be maintained through the process of converting the Quote to either an Order or an Invoice through to posting the Order or Invoice.

*It is important to* setup the Report Selections for your Sales Quotes to use the Sales Quote report with Payment Services functionality which is provided as part of the Stripe app.

## AUTOMATIC RETRIEVAL OF THE INVOICE PAID STATUS FROM STRIPE

The *Stripe Invoice Paid Update Service* is a recurring job scheduled through the Business Central Job Queue and with this Job is scheduled to execute, a successful completion of the job will update the paid status of a Posted Sales Invoice.

Two new fields related to the Stripe integration appear in the Posted Sales Invoices and Posted Service Invoices List pages.

- 1. The *Stripe Invoice Available* field indicates if the invoice has been enabled with the Stripe Payments Standard feature and a Stripe Invoice exists for the posted document, remember, a Stripe invoice is created for the Posted Sales Invoice or Posted Service Invoice at the time of emailing or printing the posted document.
- 2. The *Stripe Payment Amount* field displays the total amount your customer has been through the Stripe payment options, directly related to this invoice. The Stripe Payment Amount field offers a drilldown to display the payment transactions that were retrieved from Stripe for this invoice (these payment transactions are referred to as *Stripe Payment Events* in the next section).

5 Busines	s Central														۵
	Live Company	/ Ltd.   Fir	nance	n Management 🗸	Stripe 🗸 🛛 🛛	Cost Accounting $\vee$	Fixed Assets $\lor$	Posted Documen	ts∨ Setup	& Extensions $\vee$	Intellig	ent Cloud Ir	nsights $\vee$	=	
	Posted Sales Invoid	es: All 🗸 🗌	🔎 Search 🧻 Delete Invi	oice $\vee$ Navigate $\vee$	Correct $\lor$	Print/Send 🗸 🛛 🗳	Open in Excel	More options						Y	≡ ○ □ 2
	<u>No.</u> ~	Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Location Code	No. Printed	Closed	Cancel	S Ir Correct A	tripe nvoice wailable	Stripe Payment Amount
	103033	10000	The Cannon Group PLC		2/27/2022	5,250.79	6,300.95	6,300.95	BLUE	0	No				6,300.95
	103032	10000	The Cannon Group PLC		2/27/2022	1,259.89	1,511.87	0.00	BLUE	0	Yes				1,511.87
	103027	35451236	Gagn & Gaman	ISK	2/2/2022	88,164.00	88,164.00	88,164.00	YELLOW	0	No				
	103026	35963852	Heimilisprydi	ISK	1/31/2022	203,417.25	203,417.25	203,417.25	YELLOW	0	No				
	103025	47563218	Klubben	NOK	2/4/2022	114,728.73	114,728.73	114,728.73	YELLOW	0	No				-
	103024	20000	Selangorian Ltd.		1/31/2022	916.26	1,099.51	1,099.51		0	No				_
	103023	01445544	Progressive Home Furnishings	USD	2/5/2022	2,310.38	2,310.38	2,310.38	YELLOW	0	No				-
	103003	30000	John Haddock Insurance Co.		1/31/2022	5,454.00	5,726.70	5.724		0	No				-
	103002	20000	Selangorian Ltd.		2/7/2022	6,337.98	6,654.2			0					-
	103001	10000	The Cannon Group PLC		2/24/2022	7,438.50		L Y		$\odot$	1				-
	103022	46897889	Englunds Kontorsmöbler AB	SEK	1/31/2022	6,807.56									-
	103021	49633663	Autohaus Mielberg KG	EUR	1/29/2022	1,441									-
	103028	10000	The Cannon Group PLC		2/19/2022	/ <	Strine								-
	103020	32656565	Antarcticopy	EUR	1/24/2022				-						-
	103019	20000	Selangorian Ltd.		1/30/2022	/	nvoice		St	tripe Pa	symer	nt			-
	103031	30000	John Haddock Insurance Co.		1/31/2022	har A	Available			A	mour	nt	)	1	-
	103018	20000	Selangorian Ltd.		1/26/2022										-
	103017	43687129	Designstudio Gmunden	EUR	2/14/2022										-
	103016	42147258	BYT-KOMPLET s.r.o.	CZK	2/14/2022					<u>6,3</u>	<u>300.9</u>	<u>5</u>			-
	103015	10000	The Cannon Group PLC		2/6/2022										-
	103014	49858585	Hotel Pferdesee	EUR	2/6/2022							-			-
	103013	43687129	Designstudio Gmunden	EUR	2/6/2022		$\sim$			1,5	511.8	57		l	-
	103012	43687129	Designstudio Gmunden	EUR	2/6/2022							_	/		-
	103011	43687129	Designstudio Gmunden	EUR	2/6/2022	- \ r									-
	103010	49633663	Autohaus Mielberg KG	EUR	1/20/2022							-			-

The Stripe Payment Amount field is also visible on the Posted Sales Invoice Card page and the Posted Service Invoice Card page, along with a field called *Stripe Invoice* which offers a hyperlink to view this posted document in the Stripe Dashboard. The Stripe Dashboard is a feature-rich user interface for you to operate and configure your Stripe account. You can use it to manage payments and refunds, respond to disputes, monitor your integration, and more.

*It's important to note* that you will need the login credentials to your own Stripe account to be able to view the Business Central posted document from your Stripe Dashboard.

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POSTED SALES INVOICE   WORK DATE: 1/27/2022	(a	2) + 🖻	✓ SAVED 🖾 🦯	- 1
103033 · The Cannon Group PLC				- 1
Invoice Correct Print/Send Navigate More option	\$		0	- 1
General		Show more	① Details 👔 Attachments (0)	
102022	Due Date	Online Ma	Incoming Document Files ~	
Customer	Stripe Invoice	Closed		
Contact Mr. Andy Teal	Stripe Payment Amount · · · 6.300.95		Name Type	
Posting Date 1/27/2022	Quote No.		(There is nothing to show in this view)	
4-1				
Lines Manage More options		63		
Type No. Description	Unit of Unit Price Excl. Tax Group Quantity Measure Code VAT Code Line D	Line Amount Department iscount % Excl. VAT Deferral Code Code Project Code		
→ G/L Account 🚦 6120 Sales, Retail - EU	1 5,250.79	5,250.79 SALES		
Invoice Discount Amount	0 Tehal V/AT (CDD)			
Total Evel VAT (GRD)	9 Total Ind. VAT (GRP)			
Intal Exc. VAL (GDF)	5 TOUSTING, VAL (ODP)			
Invoice Details		Show more		
Currency Code	Payment Service Stripe Payments Standard	Payment Discount % · · · · · 2		
Shipment Date 1/27/2022		Direct Debit Mandate ID · · ·		
Payment Terms Code · · · · · · 1M(8D)		Tax Liable		
	Department Code · · · · · · SALES	Tax Area Code		
	Project Code			
Snipping and Billing >		The Cannon Group PLC		

Stripe records the movement on your account balance by creating *Stripe Transactions* – these transactions will either increase or decrease your account balance depending on the type of transaction being created:

- 1. When a customer pays one of your invoices through Stripe, your Stripe balance will increase.
- 2. When Stripe makes a payout to your bank account, your Stripe balance will decrease.

The balance on your Stripe Account can be considered a Current Asset as it represents liquid funds owned by your Company and for this reason it is highly recommended to maintain your Stripe account balance in your financial records, preferable configured as a *Bank Account* in Business Central.

When your customer successfully pays one of your invoices through the Stripe payment process, Stripe will record a new transaction on your stripe account to reflect the increase of funds in your Stripe account. For you to receive these funds, Stripe makes payouts to your bank account and creates a pay-out transaction to decrease your stripe balance with the pay-out amount. Read more about the Stripe Payout process on this help page from Stripe: https://stripe.com/docs/payouts

The *Stripe Receipts & Payouts* page in Business Central reflects all transactions on your stripe account and offers the ability to post these transactions to your financials.

S All transactions - Chase Software × + ← → C 🔒 dashboard.stripe.com 🖈 📑 🖪 🛎 🗯 🞯 E Chase Software V 🔹 Feedback? 📮 🙆 💄 Q Search.. Payments **All transactions** ▼ Filter 2 7 Export Reviews Disputes TYPE NET AMOUNT VAILABLE ON Payouts All tran Charge £3,460.63 £3,591.00 (£130.37) GBP Payment for Inv Dec 4 Charge £2.092.99 £2.171.93 (£78.94) GBP Payment for Inv Dec 4 🕁 Balances Custo Products 🖬 Repo Develop Dy CRONUS UK Ltd. | Finance ~ Cash Management ~ Stripe Sales Purchasing Setup & Extensions Intelligent Cloud Insights = & Settings Stripe Receipts and Payouts: All 🗸 🛛 🔎 Search 🤑 Transfer to Journal 🔯 View Journal 💈 Refresh Page Sales Document Currency Code Sales Document Amount Inci, VAT Currency Exchange Rate Stripe Payout Status Posting Date Description Customer No. Customer Name : 12/4/2020 Payment for Invoice 40000 2,171.93 GBP 2,171.93 -78.94 2.092.99 3.591.00 GBP 3.591.00 -130.37 3.460.63 pe 12/4/2020 Payment for Inv

The image below shows how Stripe transactions are reflected in the Stripe Receipts & Payouts page.

There are two types of transactions that will be discussed in this section:

- 1. Payment for invoice
- 2. Payout from Stripe

### PAYMENT FOR INVOICE TRANSACTIONS

Payment for Invoice transactions occur when a customer pays one of your invoices – this will increase your Stripe account balance (debit) and decrease (credit) the relevant customer in Business Central.

The *Stripe Transactions* can be accessed from the Stripe menu in Business Central. Each transaction carries an *Entry Status* to reflect the current state of the transaction in Business Central – there are 3 possible states:

### 1. New

Stripe transactions still to be recorded in Business Central.

### 2. Transferred to Journal

Transactions that are in the process of being recorded to Business Central.

#### 3. Posted

Transactions from Stripe already recorded in Business Central.



From the Stripe Transaction page, select one or more transactions, then click on the *Transfer to Journal* action from the menu section of the page, as shown below:

Dynamics 365 Business Central		Demonstration Q	0 © ?	w
CRONUS UK Ltd.   Finance ~ Cash Management ~ Stripe	✓ Sales ✓ Purchasing ✓ Setup & Extensions ✓ Intelligent Cloud Insights ✓ Ξ			
Stripe Receipts and Payouts: All $\sim$   $\rho$ Search 49 Transfer to Journal	R View Journal C Refresh Page ~		∀ ≡ 💉 [	3
Entry Status Posting Date Description Customer No.	Sales Document Sales Document Sales Document Sales Document Exchange Customer Name Sales Document Status Sales Document Type No. Currency Code Amount Ind. VAT Currency Rate Amount	Fee Amount Ne	Stripe Payout It Amount Status	
Posted : 12/4/2020 Payment for Invoice 40000	Alpine Ski House Una like 102226 2,171.93 GBP 2,171.93	-78.94	2,092.99 pending	
New 12/4/2020 Payment for Invoice 20000	Trey Research 103218 3,591.00 GBP 3,591.00	-130.37	3,460.63 pending	
Mine //huiseeveeted.downic.com/00/2016-007-4901-005-70-74511-00/Democrated	reconcernent Stripe Str			

*Useful Tip* - In the illustration above, notice there are two transactions selected, one of which has an *Entry Status* of Posted – the *Transfer to Journal* process will automatically exclude Posted transactions and for this reason you can speed up this process by selecting all transactions listed on the page before clicking on the *Transfer to Journal* action without having to exclude Posted transactions.

Clicking on the *Transfer to Journal* action will launch the *Create Journal from Stripe Transactions* page, as shown below.

Dynamics 365 Bu	usiness Centra	l.									Demonstration	a 🗘	©? 🤍
CRONUS U	IK Ltd.	Finance 🗸 🛛 Cash Mar	nagement V Strip	ie∨ Sales	· ✓ Purchasing ✓ Setup & Extensions ✓ Inte	lligent Cloud Insights 🗸	=						
Stripe Receipts	and Payouts:	All 🗸 🕴 🔎 Search	Iransfer to Journa	al 🖪 View	Create Journal from Stripe Receipts an	d Payouts		,* ×				7	7 = 💉 🛛
Entry Status	Postino Da	e Description	Customer No.	Customer N	ties default values fears				Exchange Rate	Amount	Fee Amount	Net Amount	Stripe Payout Status
Posted	12/4/202	0 Payment for Invoice	40000	Alpine Ski	Use detault values from	Last used options and filter	5	~		2,171.93	-78.94	2,092.99	pending
New	: 12/4/202	0 Payment for Invoice	20000	Trey Rese	Journal Setup					3,591.00	-130.37	3,460.63	pending
					Journal Template Name	GENERAL							
					Journal Batch Name	DEFAULT							
					Advanced >								
							Schedule OK	Cancel					

Complete this page by following these guidelines below, then click on the *OK* button to transfer the transaction(s) to a journal.

### Journal Setup

Specify the General Journal Template Name and General Journal Batch Name to be used to post the Stripe transactions to Business Central, as shown below:

Journal Setup	
Journal Template Name	GENERAL ····
Journal Batch Name	DEFAULT

	i5 Business (	entral												Demo	onstration	a <b>p</b>	© ?
$\leftarrow$	General Journ	als   Work Date: 4	/6/2020												√ Saved	0 0	*
	Batch Name		DEFA	AULT													
	Manage P	rocess Payroll	Page Pos	st/Print Line	Account	Open in Excel Actions	Related Fewer options									Y	0
	Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Currency Code	EU 3- Party Trade	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Amount (LCY)	Bal. Account Type	Bal. Account No.	Bal. Gen. Posting Type
$\rightarrow$	12/4/2020	1	20000	Customer	20000	Trey Research	Stripe Payment for Invoice 103218						-3,591.00	-3,591.00	G/L Account		
	12/4/2020		20000	Bank Accou	STRIPE	Stripe Account	Stripe Receipt - Invoice 103218						3,591.00	3,591.00	G/L Account		
	12/4/2020		40000	G/L Account	30400	Bank Charges and Fees	Stripe Fee - Invoice 103218						130.37	130.37	G/L Account		
	12/4/2020		40000	Bank Accou	STRIPE	Stripe Account	Stripe Receipt - Invoice 103218						-130.37	-130.37	G/L Account		

Notice from the image below the update to the *Entry Status* field on the Stripe transaction to reflect the current status as being *Transferred to Journal*. From the page shown below, you can make use of the *View Journal* action to open the journal containing the journal lines associated with the selected transaction.

*Useful Tip* – If you mistakenly transferred the transaction to a journal and you wish to mark the entry as Manually Processed, you can *delete the journal lines* and restart the processing of the entry.

ynamics 365	5 Business Centra	al												Demonstration	a D	©? 🔇
CRONUS	S UK Ltd.	$Finance{\smallsetminus}$	Cash Management $\lor$	Stripe $\lor$	Sales - Purchasing	g $\lor$ Setup & Extensions $\lor$	Intelligent Cloud In	sights $\lor$	=							
Stripe Recei	ipts and Payouts:	All 🗸 🕴	🔎 Search 🛛 👪 Transfer	to Journal 🛛 🕅	View Journal 🛛 😂 Refr	resh Page 🗸									7	7 = 💉 🛛
Entry Status		Posting Date	Description	Customer No.	Customer Name	Sales Document Status	Sales Document Type	Sales Document No.	Sales Document Currency Code	Sales Document Amount Incl. VAT	Currency	Exchange Rate	Amount	Fee Amount	Net Amount	Stripe Payout Status
Posted		12/4/2020	Payment for Invoice	40000	Alpine Ski House	Unposted Sales Document	Invoice	102226		2,171.93	GBP		2,171.93	-78.94	2,092.99	pending
Transferred	d to Journal	12/4/2020	Payment for Invoice	20000	Trey Research	Posted Sales Document	Invoice	103218		3,591.00	GBP		3,591.00	-130.37	3,460.63	pending

Now let's proceed to post this journal. During posting, the following transactions were recorded:

- 1. The Customer ledger now reflects a Receipt against the Invoice
- 2. The Stripe Bank Account in Business Central reflects the amount paid by the customer less the Stripe Fees amount.
- 3. The Stripe Fees account reflects the fee amount associated with the transaction

### STRIPE PAYOUT TRANSACTIONS

Stripe payout transactions occur when Stripe makes a payout to your bank account. These transactions will be recorded in Business Central as a transfer from the Stripe Bank Account to the Company Bank Account used in the Stripe payout process.

The *Stripe Transactions* can be accessed from the Stripe menu in Business Central. From this page, select one or more transactions, then click on the *Transfer to Journal* action from the menu section of the page.

Clicking on the *Transfer to Journal* action will launch the *Create Journal from Stripe Transactions* page, complete the options on this page as described in the previous section, then click on the *OK* button to transfer the transaction(s) to the journal. The image below shows an example of a Stripe payout transaction being recorded in a journal. Complete the process by posting the journal.

Dyna	nics 30	55 Business C	entr	ral														a (	) ©	? W
	~	GENERAL JOU	IRNA	ALS   WORK DA	ATE: 1/27/2022												√s	AVED	⊂ ×	
		Batch Name				DEFAU	T			<b>D</b> ·										
		Manage P	roces	ss Payroll	Page Pos	t/Print Line Acco	unt Mc	re options											70	
		Posting Date		Document Type	Document No.	Account Type	Account No.	Account Name	Description		Currency Code	EU 3- Party Trade	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Amount (LCY)	Bal. Account Type	Bal. Account No.	Bal. C Postii Type
	$\rightarrow$	10/8/2020			10000	Bank Account	WWB-GBP	World Wide Bank	Stripe Payout							7,529.21	7,529.21	G/L Account		
		10/8/2020			10000	Bank Account	STRIPE	Stripe Account Balance	Stripe Receipt							-7,529.21	-7,529.21	G/L Account		

## HOW TO REDEEM A DISCOUNT COUPON

When using the Stripe Payments Standard app for Business Central, you are offering your Customers a new way to settle your invoices. This service attracts a fee in the form of a Platform Fee, charged on all successful payments that run through the app.

The app recognizes and rewards high-volume users in the form of a *Discount Coupon* which reduces the platform fees applicable to your account. Volume is based on monetary value of transactions, not on the number of transactions.

Once you reach a volume level where you qualify for a platform fee discount, a discount coupon will be emailed to your registered email address and you will be able to redeem the discount coupon from Business Central.

To redeem your discount coupon, follow the steps below.

Make use of the Business Central search feature to find the Stripe Payments Standard page, as shown below:

Dynamics 365 Busines	is Central					)	Demonstration	a <b>a</b>	٥	? 🔇	N
	CRONUS UK Ltd. Finance Customers Vendors Items	ce -> Cash Management -> Stripe -> Bank Accounts Chart of Accounts	Tell me what you want to do  X X  Stripe Payment Standard  Co to Davae and Take					2			
	Want to lea	rn more about	Stripe Payments Standard Accounts     Administration	urchase Order urchase Invoice	> New > > > Payments >	Reports [ Setup	Excel Reports				
	Business Ce	ntral?	Documentation         Show all (20)           ③ WorldPay Payments Standard Provides information about the WorldPay Payments Standard extension         Provides information about the WorldPay Payments Standard extension								
	Activities ~		How to Export Electronic Payments     In Business Central, you can export payment journal entries into a file format according     Iteing the PayMal Bayment: Standard Extension								
	Sales This Month $f(x) = \int_{-\infty}^{\infty} \int_{-\infty}^$	Overdue Sales Invoice Over Amount 456 182	Describes how to use the extension to enable customers to make payments with PayPal. Get from Microsoft AppSource Show all (57)								
	>See more	>See more >Se	Stripe Payments Standard Now you can offer your customers a new way to pay								
	Ongoing Sales Sales Quotes Sales Orders	Ongoing Purchases Sales Invoices Purchase Orders	Wolfargin yintherns sancault Ger pail disarbs pladding a link to the WorldPay Payments Standard on Invoices. PayGel Payments Standard Adds PayGel link to your values documents so outcomers can easily pay using PayPal. Didn't find what you were looking for! Thy <b>exploring</b>	Camera	Incoming Docume My Incoming Documents	ents Product	t Videos				
	$\frac{2}{2}$	<del>9</del> , , , , , , , , , , , , , , , , , , ,	$\frac{1}{2}$	Create Incomin from Camera		Product V	Videos				

From the Stripe Payments Standard Accounts page, click on the *Actions* menu and select the *Redeem Discount Coupon* action:

Dynamic	x 365 Business Central	Demonstration Q	۵	٥	?
¢	Stripe Payments Standard Accounts   Work Date: 12/4/2020			*	
	P Search New Manage Page Actions Fever-options		V	=	
	Redeem Discount Coupon			-12	
	Demo Sandbox Account - Stripe Payments Standard Ee % of Amount				

From the Redeem Discount Coupon page, enter the Discount Coupon Code received via email and press enter to redeem the code:



Upon successfully validating the Coupon Code with Stripe, the discount will be applied to your Stripe Account as shown below:

ilea 505 buailleas e		<u> </u>			U	emonstration Q LL @
Stripe Paymer	nts Standard Accounts   Work Date: 12/4/2020	÷	edeem Coupon   Work Date: 12/4/2020 🖉 + 🖻 🗸 Saved 🛛 🖾	2		
🔎 Search	New Manage Page Actions Fe	ewer options	Redeem Discount Coupon			V 1
Name			· · · · · · · · · · · · · · · · · · ·		Enabled	Always Include on Documents
Demo Sandt	ox Account - Stripe Payments Standard		General	-		
			Id acct_1HtAcoAdB2410ToW Onboarding Completed .			
			Discuss Dataile			
			Discount Details	_		
			Enter your Coupon Id · · · KeKxttlK Current Discount % · · · · 5	5.00		
			Coupon successfully applied. Your account discount level has been updated to \$%.      OK			

## HOW TO LINK YOUR EXISTING STRIPE CUSTOMERS TO BUSINESS CENTRAL

When you link an existing Stripe Account to a Dynamics 365 Business Central company, you may have existing Stripe Customers associated with your Stripe Account that you would like to link to existing Customers in Dynamics 365 Business Central.

To assist with this initial setup and linking of Stripe Customers to Business Central Customers, make use of the *Manage Stripe Customers* action from the Business Central Customer List, as shown below:

amics 365 B	usiness Central												Q @	
RONUS	JK Ltd.   Finance - Jour	mals 🗸 🛛 Casl	h Management $\vee$	Stripe $\sim$	Cost Accounting ~ Fix	ed Assets - Posted	Documents ~	Setup & Extensions $\lor$	=					
stomers:	All 🗸 🕴 🔎 Search 🛛 New 🗸	🔋 Delete	Process v Repor	rt∨ New D	ocument 🗸 🛛 Customer 🗸	Navigate V Prices &	Discounts 🗸 🛛	Open in Excel Actions	~ R	elated $\lor$ Repor	ts ∨ Fewer opti	ons		0 ,*
lo. †	Name	Responsibility Center	Location Code PI	hone No.	Contact	Balance (LCV)	Balance Due (LCV)	New Document	(LCY)	Stripe Default Collection Method	① Details	Îl Attachm	ents (0)	
1121212	Spotsmeyer's Furnishings		YELLOW		Mr. Mike Nash	0.00	0.00	Prices and Discounts	0.00	Send Invoic		g ritterini	entes (ey	
445544	Progressive Home Furnishings		YELLOW		Mr. Scott Mitchell	1,499.03	0.00	😒 Request Approval	0.00	Send Invoic	Sell-to Custo	omer Sales Hi	story	
1454545	New Concepts Furniture		YELLOW		Ms. Tammy L. McDonald	222.241.32	0.00	Workflow	0.00	Send Invoic	Customer No.		(	0112121
905893	Candoxy Canada Inc.		YELLOW		Mr. Rob Young	0.00	0.00	Gash Receipt Journal	0.00	Send Invoic				
905899	Elkhorn Airport		YELLOW		Mr. Ryan Danner	0.00	0.00	Sales Journal	0.00	Send Invoic	0	0	C	þ
905902	London Candoxy Storage Cam		YELLOW		Mr. John Kane	0.00	0.00	CT Apply Tomplate	0.00	Send Invoic	Ongoing Sales	Ongoing Sales	Ongoing Sales	5
000	The Cannon Group PLC (EUR)	BIRMINGHAM	BLUE		Mr. Andy Teal	185,274,42	-281.12	D Apply lemplate	72.42	Send Invoio	- Contract		- CAUCIN	
000	Selangorian Ltd.				Mr. Mark McArthur	95,724.45	49.678.99	Display	14.71	Send Invoio	0	0	0	P .
309920	Metatorad Malaysia Sdn Bhd		YELLOW		Mrs. Azleen Samat	0.00	0.00	Manage Stripe Customers	0.00	Send Invoic	Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos	
312912	Highlights Electronics Sdn Bhd		GREEN		Mr. Mark Darrell Boland	0.00	0.00	0.00	0.00	Send Invoio	0	0	0	5
339921	TraxTonic Sdn Bhd		YELLOW		Mrs. Rubina Usman	0.00	0.00	0.00	0.00	Send Invoic	0	U		
	C		NELOW.		14 C - 4 ADDAC	0.00	0.00	0.00	0.00	Const Investo	Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipt	

The *Manage Stripe Customers* page displays all Stripe Customers with the associated Business Central Customers. This page can be used to change the mapping from Stripe Customer to Business Central Customer and can also be used to establish a new link between a Stripe Customer and a Business Central Customer – make use of the dropdown available in the Customer No. field to edit or add the link, as shown in the image below:

*It's important to note* that a single Business Central customer may have multiple Stripe Customers associated with it due to the fact that one Stripe Customer is fixed to a Currency, but the same restriction does not exist in Business Central.

Dyn	amics 3	65 B	usiness Central											?	M
	$\leftarrow$	Mai	nage Stripe Customers   Work Date: 26/01/2023								√ Saved		3 ,4		
		۶	Search 😨 Edit List 🖪 Open in Excel Mor	e opti	ons							2	7 🔳		
			Stripe Customer Name		Stripe Customer Currency Code	Stripe Customer E-Mail	Stripe Customer Id ↑	Cust	omer No.	Customer Name					
					GBP		cus_HxC0g0TPEtjgle			_					
		-	Adatum Corporation	1	GBP		cus_lwzCJ7n835oosc	*		× _					
			Trey Research		GBP		cus_J0fTUHoorAFXDv								
			Adatum Corporation		GBP		cus_J0R3LqGP2Fq9nK		No. †	Name	Post Code	Phone	No.		
									→ 01121212	Spotsmeyer's Furnishings	US-FL 37125	5		-	
									01445544	Progressive Home Furnishings	US-IL 61236				
									01454545	New Concepts Furniture	US-GA 3177	2			
									01905893	Candoxy Canada Inc.	CA-ON P7B				
									01905899	Elkhorn Airport	CA-MB R0			-	
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								L	+ New			Select fro	om full li	st	