# User Manual Stripe Payments Standard

for Microsoft Dynamics 365 Business Central



Chase Software Solutions Ltd. 40 Gracechurch Street, London, EC3V0BT T: + 27 86 112 4273 www.chasesoftware.biz

## 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.

Dynamics 365 Busine	ess Central			4						Demonstration	a <b>D</b>	Ø	? 👿
	CRONUS UK Ltd.   Finance - Cash Management - Stripe - Cuatomers Vendors Items Bank Accounts Chart of Accounts Headine Want to learn more about		Tell me what you want to do Extension Management Go to Pages and Tasks Extension Management	Administration	2 X	urchase Order urchase Invoice		> Reports > Setup	🗄 Excel Reports	/			
	Business C	Central?	ze Oven	Decumentation (2) QR-Bill Management Set up the QR-Bill Management extension exten The VXI Group Management Extension Viou can engage with other businesses to form. (2) Installing and Unnixtilling Extensions in Busine Learn about Installing and environs	a VAT group, and act as either a								
	£9,607 >See more Ongoing Sales Sales Couctes 2 Sales Order 2 4	Amount £39,75 >See more	54 £ Ongoing Purchases Purchase Onders 5	Get from Microsoft AppSource Automatic Dimension Management This Automatic Dimension System extension and Vendor Curcle Management This extension allows the creation of Master Pu Finance Extension (88) Curclemas the Microsoft Dynamics 365 Busines Didn't find what you were looking for? Try exploring	rchase Quotes that can be used	i for multi	Camera	Incoming Do My Incomin Documents	7 (	oduct Videos			

From the Extension Management Page, click on the *Configure* action on the *Stripe Payments Standard* extension, as shown below:

Extension Management   Work Date: 1/	26/2023				
, Search Details Manage	More options			67 🔳	
👻 Install 🗮 Uninstall 🔆 Unp	ublish 🗳 Configure 🗋 Download Sourc	e 🚯 Learn More 🗮 Refresh		\$	
Publisher		Name T Version		Published As	
Installed		Company Hub	v. 19.0.29894.30693	Global	
Installed		Data Archive	v. 19.0.29894.30693	Global	
		Email - Current User Connector	v. 19.0.29894.30693	Global	
		Email - Microsoft 365 Connector	v. 19.0.29894.30693	Global	
Installed		Email - Outlook REST API	v. 19.0.29894.30693	Global	
Installed		Email - SMTP Connector	v. 19.0.29894.30693	Global	
Installed		Essential Business Headlines	v. 19.0.29694.30693	Global	
Installed Manage Installed		Late Payment Prediction	v. 19.0.29894.30693	Global	
	Manage	Library Assert	v. 19.0.29894.30693	Global	
	₽ <sup>#</sup> Install	Library Variable Storage	v. 19.0.29894.30693	Global	
Installed		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	
	Learn More	Sales and Inventory Forecast	v. 19.0.29694.30693	Global	
Installed		Send remittance advice by email	v. 19.0.29894.30693	Global	
Installed	Manage	Send To Email Printer	v. 19.0.29894.30693	Global	
Installed	a Select More	Simplified Bank Statement Import	v. 19.0.29894.30693	Global	

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

Evenon Setting   Work User: V27022   C +     C +        C +        C +           C + <b>C C</b>	
Group         App ID         b241d58e-f83d-433a-97d2-de5c2d5ia76eb         Publisher         C use SOFTWARE	7 <sup>4</sup>
App ID	
	-
Nume	

The last step in the installation process is to assign the new Business Central Permission Set to the users that are going to be using the app. During the installation of the app, a new Permission Set was created with the name *csa\_StripePmtStd*. Make sure you assign this permission set to the relevant users to avoid getting permission related errors while using the app.

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:

Dynamics 365 Busine	ess Central				Demonstration Q Q 💿 ? 👿
	CRONUS UK Ltd.   Finance Cash Management Stripe Customers Vendors Items Bank Accounts Chart of Accounts Headline Want to learn more about			Tell me what you want to do	9
	Business Ce •• Activities~ Sales This Month £9,607	overdue sales invoice £39,754	Over Amos	Commentation Decommentation Show all (20) Show table Services to Centract Base of Supply to registered outcomer Sale of Services to Centract star Service Contract Quotes You can create a service contract their manually or from a service contract quote. You c Spece objects as web services to make them immediately available for your Business C	
	Congoing Sales Sales Quotes 2 2	Sales Invoices 7 2 2 2 2 2 2 2 2 2	- 10	Software Connections between your data and SharePoint and automatically gen ODT service 385 Row metanoes jobs adding service tickets, field service, and maintenan	reduct Videor

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 Busines	is Central					Demonstration Q D 🚳 ? W
	CRONUS UK Ltd.   Finance ~ Cash Man	ge < Service Connections   Work Date: 4/6/2020	1	0 4 2		
	Customers Vendors Items Bank Accounts	Ch 🔎 Search 📌 Setup 월 Open in Excel		⊽ ≡		2
	Headline	Name	Status	_		
	Want to learn mo	CE AMC Banking Setup	Enabled	New Payments	> Reports > Setup	Excel Reports
		Common Data Service Connection Setup	Disabled			
	<b>Business Central?</b>	Microsoft Dynamics 365 Connection Setup	Disabled	_		
		Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount	; Disabled			
	0.8	Doc. Exch. Service Setup	Disabled			
	Activities ~	Email Accounts	Disabled			
	Sales This Month Overdue Sales Inv	sice 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:

cit - Stripe Payments Standard Step	CRONUS UK Ltd. Finance ~ Cash N	Aanage E Service Connections   Work Date: 4/6/2020	0 0 2
ang       Moregions         encl       Sign Control Account Stage         mag       Now Survey Control Account Stage       Sign Control Account stage       Sign Control Account stage         mag       More Survey Control Account Stage       Sign Account       Birk Account       Sign Acco	lit - Stripe Payments Standard Setup		
the step       Step Control Account Setup       Step Invice Setup       St	× This is a demonstration company. You can speed up the setup process	by creating a demonstration Stripe account. Click to setup a demonstration Stripe account now.	
trip     Stripe Control Account 5 stripe     Stripe Control Account 5 stripe     Stripe Control Account 5 stripe       me     Demo Sandoor Account - Stripe     Demo Sandoor Account - Stripe     Bark Account       gip Account     Uak your Stripe Account     Bark Account     Bark Account       ways Include on Documents     Image Account     Image Account     Deter Sandoor Account - Stripe       gip Account     Uak your Stripe Account     Image Account     Image Account       gip Account     Image Account     Image Account     Image Account       gip Account     Image Account     Image Account     Image Account       me     Image Account     Image Account	anage More options		
Intersection Account       Status Bryments       Section to be a Bank Account to be or a Bank Account       Status Bank Account </th <th>eneral</th> <th></th> <th>S</th>	eneral		S
The second secon	tup	Stripe Control Account Setup	Stripe Invoice Setup
is account is a cocount is the Payout account on your Stripe Account. This is the payout account on your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. This is the outs when Stripe effects a pay-out to your Stripe Account. The outs when Stripe effects a pay-out to your Stripe Account.	me Demo Sandbox Account - Strip	Payments State of the Control Account used in your financial records to reflect your type to be a Bank Account, but you can use a G/L Account as well.	r Stripe balance. Stripe Invoice Description Sales Document Posting Description
bild	Cription Demo Sandbox Account - Strip		Include Custom Text
ages include on Documents:	pe Account · · · · · · Link your Stripe Account		Stripe Invoice Custom Text
as the Payout account on your Stripe Account. This is the source of Service to your Bark Account.	abled · · · · · · · · · · · · · · · · · · ·		Stripe Invoice Description Preview · · · · · · Order SO-134772
ms of Service	vays Include on Documents · · · · · · · · ·		
ms of Sence		i as the Payout account on your Stripe Account	t. This is the
	Click	to setup a demonstration Stripe account now.	ik Accourt.
	ms of Service https://stripe.com/		
		/	

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

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
Stripe Account Id		Connect my existing Stripe 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 Docume	ints		Reporting Category Setup	11 categories configured. Click to change
Logo		C	Stripe Invoice Setup	
		5	Stripe Invoice Description	Sales/Service Document Posting Description
			Include Custom Text	
Terms of Service		https://stripe.com/connect-account/legal ····	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:

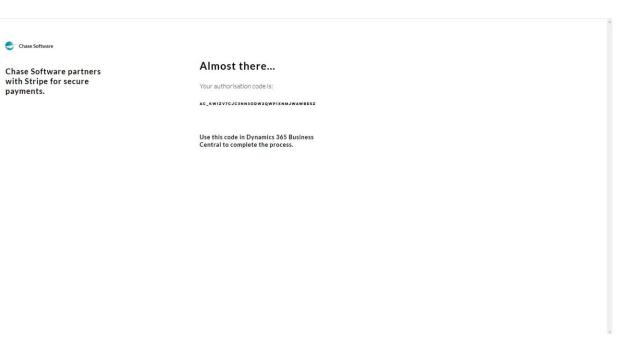
- 1. First, you will be presented with the Stripe login to select which account you want to connect to Business Central.
- 2. Next, Stripe will issue an Authorization Code and you will copy this code and provide this code to Business Central.

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

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.	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
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 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
Terms of Service	https://stripe.com/connect-account/legal	ny existing Stripe Acco	v 50-134772
0/hunsthame=1#		thorisation code	

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.

Stripe Payments Standard Se	- up		
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.	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
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 own G/L Account
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	
	5	Stripe Invoice Custom Text	
		Stripe Invoice Description Preview	Order SO-134772
Terms of Service	https://stripe.com/connect-account/legal ····		

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:

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 financial records to reflect you Bank Account, but you can use a G/L Account as well.	ur 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	Create a new Stripe Account	Account No. STRIPE	
Stripe Account Id	Connect my existing Stripe Account Create a new Stripe Account	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 used to map the Reporting Categories on Strip structure.	pe Transactions to your own G/L Account
Enabled		Reporting Category Setup 11 categories configured. C	Click to change
Always Include on Documents		Stripe Invoice Setup	
Logo		Stripe Invoice Description Sales/Service Document Pos	sting Description
	5	Include Custom Text	
		Stripe Invoice Custom Text	
Terms 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 Acco Bank Account, but you can use a G/L /	ount used in your financial records to reflect your Stripe balance.	This is typically setup to be a
Description	Demo Sandbox Account - Stripe Payments Standard - Fee % of a			
Setup	Create a new Stripe Account	Account No.	STRIPE	
Stripe Account Id		Stripe Account Name	Stripe Account	
Stripe Account	Link a new Strice Account	Stripe Reporting Category Setup		
Stripe Account	Waiting for onboarding to be completed	The Stripe Reporting Category Setup i structure.	s used to map the Reporting Categories on Stripe Transactions to	o your own G/L Account
Enabled		ACCO Category Setup	11 categories configured. Click to change	
Always Include on Documents		STILLBOX ACCOL		
Logo	S	o Sandbox Account - Stripe	Sales/Service Document Posting Description	
renns or service	https://sulpe.com/connect-account		Order SO-134772	
	· · · · · · ·			
	······ Link a	a 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:

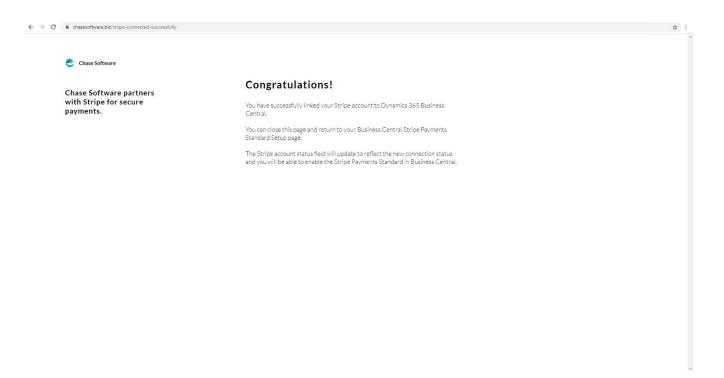
View - Service Connections - Dvn × +		- <b>G</b> ×
	y%20Ltd.&dc=0&bookmark=70%3beAUAAAF7Yw8zAGEAXw8TAHQAcgBpAHAAZQAgAFMAdABhAG4AZABhAH	HIAZAAGAEEAYWBJAGBAdQBuAHQAOGAGADE%3d 🖪 🔍 🖈 📴 🖪 🕭 🗫 🥨 🗄
Dynamics 365 Business Central         Live Company Ltd.       Finance        Journals          Phased Trial Balance       Chart of Accounts       Bank Acco         HEADLINE       Hill       Hill         + 0       Activities       Activities         Activities       INTELLOUBENT CLOUD       Overnue Punchase DOCUMENTS         Leam More       Integree Cloud       >See more	Manage       More options         EDIT - STRIPE PAIMENTS STANDARD SETUP         General         Stripe         Name         Stripe Payments Standard         Description         Stripe Payments Standard - Fee & of         Data of the payments standard - Fee & of         Aways include on Docu         Image: A ways allow poperiod of the payment wide the service         Image: A ways allow poperiod of the payment wide the service         Image: A ways allow poperiod of the payment wide the service         Image: A ways allow poperiod of the payment wide the service	HIAZAAgAEEAVveljAGBAAGBuAHCAAGAgAABEN33  Q A C Z Z V Pop-ups blocked:  Pup-ups blocked:  Pup-ups blocked:  Continue blocking  Mange Dore  Contract Accounting  Contract blocking  Mange Dore  Contract Accounting  Contract
PARLENTS	HMIC VAT Setup OCR. Service Setup Orkine Map Setup UK Protocol Service SMTP Mail Setup Social Engagement Setup EU VAT Reg. No. Validation Service Setup	Counting S

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:

← → C			☆ !
🚭 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 yourstripeaccount@youremail.com	Have a Stripe account? You can use the same email.	
	Next →		
Powered by <b>stripe</b> ① English (US) ≎			

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:

Work Date: 1/26/2023 Stripe Payments Standa	rd Setup	+ 10						
Actions	1							
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						
Stripe Account Id	acct_1HNHp2Gbe7rPuWzt	Account No. STRIPE						
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 Reporting Categories on Stripe Transactions to your own G/L Account						
Terms of Service	https://stripe.com/connect-account/legal Stripe Payments St Connected. Click t	andard - Fee % of Amount						
C190/Provinframes 1#								

## 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 fir Bank Account, but you can use a G/L Account as well.	nancial records to reflect your Stripe balance. This is	s typically setup to be a
Description	Demo Sandbox Account - Stripe Payments Standard - Fee % of Amount		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 F structure.	leporting 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 ····		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.

Search + New 😨 Edit List 🔋 Delete					16
Stripe Category Name †	Description	Account Type	Account No.	Account Name	
charge	Charge	Customer			
connect_reserved_funds	Connect reserved funds	G/L Account	*		
fee	Fee	G/L Account	*		
payout	Payout	Bank Account	*		
payout_reversal	Payout reversal	Bank Account	*		
platform_earning	Platform earning	G/L Account	*		
platform_earning_refund	Platform earning refund	G/L Account	*		
refund	Refund	Customer			
risk_reserved_funds	Risk reserved funds	G/L Account	*		
transfer	Transfer	Bank Account	*		
transfer_reversal	Transfer 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	d Setup	<ul> <li>(2) + iii</li> </ul>		√Saved ⊏t * <sup>4</sup>	
X Stripe Payment Standard has been enabled, w Actions General	tou can also enable a service to retrieve Payment updates fror	Shipe. Click to enable this now.		Show mare	
	ayments Standard The Sto ayments Standard Explored Instruments Stondard Concernents Instruments Concernents Storige A Thirtis explored Thirtis explored Concernents	This extension uses the Stripe service a Third-party provider. By This extension, you will be subject to the applicable terms, conditions, and privacy policies that Stripe may make available. When you establish a connection through the Stripe Payments in the stripe terms conditions, customer data from the invoice such as a finite account 10 will be interted into the Stripe Payments and a stripe account 10 will be interted into the Stripe payment has a stripe account 10 will be interted into the Stripe Payments of the stripe payment is determined as due to stripe account 10 will be interted into the Stripe payment into a stripe stripe account 10 will be interted into the Stripe payment into a stripe stripe. Note that a stripe the stripe the stripe the stripe the stripe stripe to be stripe to be stripe stripe. Note that you can diable or unitability the Stripe Stripe stripe stripe stripe actions at any time to discontinue the functionality.	Stripe Invoice Setup  Stripe Invoice Description Include Custom Test Stripe Invoice Custom Test Stripe Invoice Description Review Is the Count	Sales Document Posting Description	

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 1/26/2023	+ 🗊		√Saved 🖆 📌
Stripe Payments Standard Setup			
General			Show more
Setup	Stripe Control Account Setup		2
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	typically setup to be a
Description Demo Sandbox Account - Stripe Payments Stands ree % of Amount	Stripe Account Type	Bank Account	×
Stripe Account Id	Account No.	STRIPE	~
Stripe Account	Stripe Account Name	Stripe Account	
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	11 categories configured. Click to change	
3	Stripe Invoice Setup		
Terms of Service	Stripe Invoice Description	Sales/Service Document Posting Description	~
	Include Custom Text		~
	Stripe Invoice Custom Text		
	Stripe Invoice Description Preview	Order SO-134772	

14

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	Ø	? 👿		
		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	E Excel Reports					
	Want to lear	rn more about	> Job Queue Entries	Lists	Ω	urchase Order urchase Invoice		> Reports > Setup	E Excel Reports						
Business Central			> Job Queue Log Entries	Lists											
	business Ce	intral:	Documentation	Sho	w all (20)										
	o∎ Activities∨		Posting date on value entries Learn how the Adjust Cost - Item Entries batch job	b identifies and assigns a posting da	ite										
	Sales This Month	Overdue Sales Invoice Over	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	£39,754 £1	Adjust Settlement Exchange Rates for VAT Entries Use a batch job to settle VAT entries according to		he										
	>See more	>See more >Se	Get from Microsoft AppSource	Sho	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	ise	Camera	Incoming Do My Incomin	10	roduct Videos						
	<u>2</u> <u>4</u> <u>7</u> <u>5</u>		Entries Source Names Add the Source Name column to all your Entries			Create Incomin_									
			Didn't find what you were looking for? Try exploring			from Camera									

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

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		51	1440
Ready	EUROPE\NAVSNAP	Codeunit	6700	O365 Sync. Management	Auto-created for retrieval of new data f			10/2/2020 12:10 PM	53	- 63	1440
On Hold		Codeunit	5918	ServOrder-Check Response Time				8/29/2020 8:00 AM		83	60
Ready	EUROPE\NAVSNAP	Codeunit	459	Remove Orphaned Record Links	Remove orphaned record links			10/28/2020 1:02 PM	13	8	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 Business Central		Demonstration Q D 💿 ? 🖤
CRONUS UK Ltd.   Finance Cash Management Stripe	Tell me what you want to do	
Customers Vendors Items Bank Accounts Chart of Accounts	Stripe Payments Standard	2
Headline	Go to Pages and Tasks	
Want to learn more abou	Stripe Payments Standard Accounts     Administration     urchase Order     New     New     Reports     urchase Invoice     Payments     Setup	Excel Reports
Business Central?	Documentation Show all (20)	
Dusiness Central:	WorldPay Payments Standard     Provides information about the WorldPay Payments Standard extension	
0.	Using the PayPal Payments Standard Extension     Describes how to use the extension to enable customers to make payments with PayPal.	
Activities ~ Sales This Month Overdue Sales Invice d Amount d		
£9,607 £39,754 :		
>See more >See more	Stripe Payments Standard Now you can offer your customers a new way to pay	
	WorldPay Payments Standard Get paid faster by adding a link to the WorldPay Payments Standard on invoices.	
Ongoing Sales Ongoing Purchae Orders Sales Invoices Purchae Order	PayPal Payments Standard Adds a PayPal link to your sales documents so customers can easily pay using PayPal. My Incoming	oduct Videos
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.

	(2) + B	√Saved ⊑ 🛒
Stripe Payments Standard Setup		
$\times$ Stripe Payment Standard has been enabled. You can also enable a service to	o retrieve Payment updates from Stripe. Click to enable this now.	v
xctions		
Seneral		Show more
etup	Stripe Control Account Setup	Stripe Invoice Setup
Stripe Payments Standard	The Stripe Account is the Control Account used in your financial records to reflect your Strip balance. This is typically setup to be a Bank Account, but you can use a G/L Account as well.	
Stripe Payments Standard - Fee % of A		Include Custom Text
tripe Account Connected. Click to Disconnect.	Account No. STRIPE	Stripe Invoice Custom Text
nabled · · · · · · · · · · · · · · · · · · ·	Stripe Account Name Stripe Account	Stripe Invoice Description Preview · · · · · Order \$0-134772
Iways Include on Documents · · · · · · · ·	Stripe Payout Account Setup	
ogo	This section is the Bank Account defined as the Payout account on your Stripe Account. This account used to record receipts and payouts when Stripe effects a pay-out to your Bank Acc	
5	Account No. CHECKING	
erms of Service	stripe Pay-out Bank Account Name · · · · World Wide Bank	
	Stripe Fee Account Setup	
	Fee G/L Account No	
	Stripe Fees G/L Account Name · · · · · · Bank Charges and Fees	

## 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 *Receipts & Payouts from Stripe* page in Business Central.
- 4. Pay-outs received from Stripe into your own Bank Account are retrieved from Stripe and displayed in the *Receipts & Payouts from Stripe* in Business Central.

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

nics 365 Business	Central									E.		۵ ۵	?	
	CRONUS Inter	rnational Ltd.	Sales∨ <u>Strip</u>	<b>e</b> ∨ Purchasing	Inventory	Posted Docum	ients V Shopify	<ul> <li>All Reports</li> </ul>	=					
	Customers linked	to Stripe Invoid	ces linked to Stripe	Receipts andts	from Stripe						-13			
	Want to carn more about Business Central?						Actions + Sales Quote + Sales Invoice + Sales Order	+ Sales Return Order + Sales Credit Memo > Tasks	> Sales > Reports > History					
	Activities ~ 										ł.			
	For Release Sales Quotes - Open >	Sales Orders - Open 20	Completely Re from Stock O	Ready To Ship	Partially Shipped	Delayed       14       >	Average Days Delayed 7.5	Sales Return O - Open - Open ->	Sales Credit M - Open 1 >					
	Intercompany			Use	r Tasks	Email State	us		Approvals					
	Incoming Transaction New Intercom Transactions	Rejected er Companies O	Outgoing Transact Intercompany to Send >	_	lser Tasks Iding User ks	Email Activitie Failed Emails Outbox >		in Sent Emails Last 30 Days O	Pending Approvals Requests Sent — Approval					

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. Derik Stemeson	Customer Picture >	
	Payments Show more		
Ø	Payment Terms Code     11M(8D)     Stripe Default Collection Method     Integrated - Stripe will and invoice once paid       Integrated - Stripe will conduct and the stripe will conduct an	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 ⊑	×*
102226 · Alpine	Ski Ho	use								$\sim$				
Posting Prepare Invoice	Release	Request Ap	proval Navigate	Actions Rela	ated Fewer options					1	16			0
General >											Alpine	Ski House 4/6/2020	5/6/2020 Open	
Lines Manage Line	Page	Fewer options									111		Ø	Ē
							Unit of Measure						Customergroup	-
Type → Resource	No.		Description Linda Martin		Location Code		Code	Unit Price Excl. VAT 98.50	Line Disc	count % Line Amount Excl. VAT 2.068.50	1.13	n Department Code	Code	
-> Resource	: LIND	4	Linda Martin			2	HOUR	98.50		2,068.50		0		
														1
Subtotal Excl. VAT (GBP)				2,068.50	Invoice Discount %				0	Total VAT (GBP)			103.43	1
Inv. Discount Amount Excl. VAT	(GBP)			0.00	Total Excl. VAT (GBP)				2,068-50	Total Incl. VAT (GBP)			2,171.93	3
Invoice Details													Show less	55
	_													-
Currency Code				~ …	Payment Method Code				<b>∠</b> ≚	Customergro			~	1
Shipment Date	4	6/2020			EU 3-Party Trade					P scount % · · · · · ·			2	2
Prices Including VAT	• • • • • • • •	$\supset$			Payment Service		Stripe Payments Stand	Demo Sa		Pmt. Discount Date	4/14/202	:0	<b>C</b>	
VAT Bus. Posting Group	D	OMESTIC		$\sim$			Account - PayPal Paym Sandbox Account - Wo		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 Rel	ease Request	Approval Navigate	Actions	s Relat	ted Fewer op	tions							
General >											Alpine Sk	House 4/6/2020	5/6/2020 Open
Lines Manage Line Pag	e Fewer optic	ins											63
Type → Resource	No. LINDA	Description Linda Martin	Edit	- Selec	ct Payment	Service			2	× unt Excl. VP 2,068.5	Qty: to Assign 0	Department Code	Customergroup Code
Subtotal Excl. VAT (GBP)			→	Available	Strip Den	e Payments Standard to Sandbox Account - P		Description Stripe Tour RE d Demo Sandb, Account Demo Sandbox Account					103.43
Inv. Discount Amount Excl. VAT (GBP)			-	U		o sandox Account - v	onoray rayments stan		- Use the work - Payr	3.2)			2,171.93
Invoice Details													Show less
Currency Code			Set Up	o Payment	t Services					ode ····			
Shipment Date	4/6/2020								ок	el t % · · · ·			2
Prices Including VAT							Account + Dav/Dal D	ayments Standard,Demo		te · · · ·	4/14/2020		<b></b>
VAT Bus. Posting Group	DOMESTIC						Sandbox Account - Standard	WorldPay Payments	··· Direct Di	ebit Mandate ID			
Payment Terms Code	1M(8D)									Code			
					Department Co	de ·····							

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:

65 Business Central									Demonstrati	on Q Q @
Sales Invoice   Work Date: 4/6/2020			Tell me what you want to do	2	" ×					√Saved □ 🖌
102226 · Alpine Ski H	louse		Report Selections - Sales							
Posting Prepare Invoice Relea	se Request Approval Navigate	Actions F	Go to Pages and Tasks							
Functions      Request Approval	✓ ➤ Posting ✓		> Report Selection - Sales	Administration	П					-5
			Documentation	Show	all (20)					
Lines Manage Line Page	Fewer options		How to Include Company Registration Numbers or When generating certain sales reports and purchas							8
Type N			<ul> <li>Setting Up Reports to Print on Specific Printers Learn about specifying a printer for a report and us</li> </ul>			ount %	Line Amount Excl. VAT		Department Code	Customergroup Code
→ Resource 🗄 🗄 U	NDA Linda Martin		() How to Print Sales and Purchase Invoice Books The Sales Invoice Book report and Purchases Invoi	te Book report allow you to check all			2,068.50	0		
			Get from Microsoft AppSource	Show a	ll (277)					
Subtotal Excl. VAT (GBP)		2,068.50	Pay On Sales Order Record payments directly on your sales orders.			Total VAT	Г (GBP)			103.43
Inv. Discount Amount Excl. VAT (GBP)		0.00	Power BI Gold Sales Data Connector Ready-made Power BI sales reports, direct from Mi	crosoft Dynamics 365 Business Centr	al.	Total Incl	I. VAT (GBP)			2,171.93
Invoice Details			Multiple Report Layout Selector Automatic report layout selection for Microsoft Dy							Show less
Currency Code			Didn't find what you were looking for? Try exploring		-	Custome	ergroup Code			
Shipment Date	4/6/2020		EU 3-Party Trade			Payment	Discount %			2
Prices Including VAT	•		Payment Service Stripe Payment	nts Standard		Pmt. Disc	count Date	4/14/2020		
VAT Bus. Posting Group	DOMESTIC					Direct De	ebit Mandate ID · · ·			
Payment Terms Code	1M(8D)					Location	Code · · · · · · · · ·			
			Department Code							
Shipping and Billing										Show more
Ship-to	Default (Sell-to Address)	~	Bill-to Default (Cust	omer)	~					
Contact · · · · · · · · · · · · · · · · · · ·	lan Deberry									

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

Dyna	mics 36	5 Business	Central				Demonstration Q Q	Ø	? 🐧	w
	~	Report Select	ion - Sales   Work Date: 4/6/2020				√swed □ C	×		
		Usage · · · ·					Draft Invoice	~		
							Quote			
		Manage	Open in Excel				Blanket Order	- 1		
							Order	- 1		
			Sequence †		Report ID	Report Caption	Invoice	- 1		
		$\rightarrow$	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			
							Draft Invoice			
							Pro Forma Invoice			
							Archived Blanket Order			

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	ss Central								Demonstration Q	۵ ۵	? (
÷	Report Sel	lection - Sales   Work Date: 4/6/2	020							√ Saved	0 🖙 💉	
	Usage · ·				Draft	Invoice					~	•
	Manage	Open in Excel									V	
		Sequence †			Report ID Report Caption		Use for Email Body	Use for Email Attachment	Email Body Layout Description			
	$\rightarrow$	1	1	704	179085 V Draft Invoice with Payment Servic	8	0		-			
				1007.9	Object Caption Desiries Parchage Order							
						uts						
					Draft Invoice with Payment Services Pro Forma Invoice with Payment Services							
					Quantity Explosion of BOM	rm full list						
					Select m	m full list						

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				Ø	) + 🛙						√Saved ⊑ ,
102226 · Alpine Ski House	2			Ŭ							
Posting Prepare Invoice Release Rec	quest Approval Navigate	Actions R	elated Fewer options								(
🖡 Functions 🗸 🛛 Request Approval 🗸 🔹	Posting ~										-
iii e	ost										
Lines Manage Line Page	ost and New										
	ost and Send eview Posting		Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Disco	unt % Line Amount Excl. VAT	Qty. to Assign	Department Code	Customergroup Code
→ Resource III : LINDA	raft Invoice			21	HOUR	98.50		2,068.50	0		
	o Forma Invoice										
ED TE	st Report										
Subtotal Excl. VAT (GBP)	emove From Job Queue	2.068.50	Invoice Discount %				0	Total VAT (GBP)			103.43
	tach as PDF	0.00	Total Excl. VAT (GBP)					Total Incl. VAT (GBP)			2,171.93
Invoice Details											Show less
Currency Code		~ …	Payment Method Code	в	IANK		$\sim$	Customergroup Code			$\sim$
Shipment Date	D	-	EU 3-Party Trade					Payment Discount % · · · · ·			2
Prices Including VAT			Payment Service	s s	tripe Payments Standa	rd		Pmt. Discount Date	4/14/2020		<u></u>
VAT Bus. Posting Group DOMEST	nc	$\sim$						Direct Debit Mandate ID · · ·			~
Payment Terms Code		$\sim$						Location Code			$\sim$
			Department Code				$\sim$				
Shipping and Billing											Show more
Ship-to Default		~	Bill-to	G			×				

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:

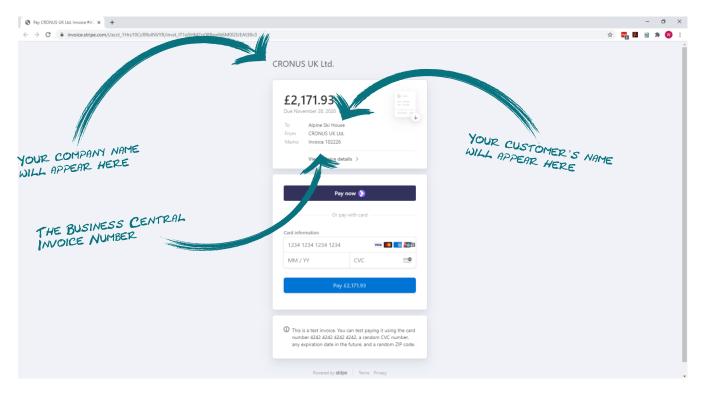
365 Business Central		Demonstration Q 🗘 🔞
Sales Invoice   Work Date: 4/6/2020	(2) + 8	√Saved ⊑ x <sup>≮</sup>
102226 · Alpine Ski House		
Posting Prepare Invoice Release Request Approval Navigate Actions Related	Draft Invoice with Payment Services	٥
General >		Alpine Ski House 4/6/2020 5/6/2020 Open
	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 · · ·	
Subtotal Excl. VAT (GBP)	× No	Total VAT (GBP)
Inv. Discount Amount Excl. VAT (GBP) 0.00 To	× Bill-to Customer No. · · · · · · · · · 40000 · · ·	Total ind. VAT (GBP)
	× Sell-to Customer No. · · · · · · · · · · · · · · · · · · ·	
Invoice Details	× No. Printed · · · · · · · ·	Show less
Currency Code	+ Filter_	Customergroup Code · · · · · · · · · · · · · · · · · · ·
Shipment Date ····································	Filter totals by:	Payment Discount % ······ 2
Prices Including VAT ···································	+ Filter	Pmt. Discount Date
VAT Bus. Posting Group		Direct Debit Mandate ID
Payment Terms Code · · · · · · · · · · · · · · · · · · ·	Advanced >	Location Code · · · · · · · · · · · · · · · · · · ·
D	Advanced /	
	Send to Print Preview Cancel	
Shipping and Billing	Stend toni PHIL PREVERY CARLES	Show more
Ship-to Clefault (Sell-to Address)	l-to vilt (Customer)	
Contact · · · · · · · · · · · · · · · · · · ·		

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 and make sure your Report Selection setup has been configured correctly.

Dynamics 365 Business Central		Demonstration Q 📮 🚳 ? 👿
	Page 1/1	$\times$
	Dant invoice Agen 201 House By Stand Strategy By	
	Market         2086 50           VET Annual Specification         3021           VET Annual Specification         4000           VET Annual Specification         3020	
	The second frame is the second secon	

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					2 + 🗈			√Saved ⊑ ;
102226 · Alpine Sk	i House							
Posting Prepare Invoice R	elease Request A	pproval Navigate	Actions	Related Fewer options				(
General								Show less
Customer No.	40000		$\sim$	Contact · · · · · · · · · · · · · · · · · · ·	lan Deberry		Status ····· Open	
Customer Name	Alpine Ski Hou	se		Your Reference			Work Description	
Sell-to				Document Date	4/6/2020	<u></u>		
Address	Walter-Gropiu:	-Strasse 5		Posting Date	4/6/2020			
Address 2	Park Stadt Sch	vabing		Due Date ·····	5/6/2020			
City				Stripe Invoice No.	ACE7EE8F-0001			
Post Code	DE-80807			Stripe Payment Amount			Open 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 4/6/2020	
Email	alpine.ski.hous	e@contoso.com		Assigned User ID		and Dat	e · · · · · · · · · · · · · · · · · · ·	
						ung Dau		
Lines Manage Line P	age Fewer option	is				Due Date ···	5/6/2020	
					Unit of Measure		e No. ACE7EE8F-000	1 nergroup
Type → Resource	No.	Description Linda Martin		Location Code Q	21 HOUR	Unit Price B	ent Amount	
						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	10	2,171.93
entral.dynamics.com/00c89136-4b27-4	991-84f6-7fb7c5531c	4/Demonstration?runin	rame=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 Print/Send	Release D	ostina O	Inder Navinat	e More options		61								0
The choice of the series	The feature of the	osting o	inter interigat	Contact Name	Ian Deberry			Release S	tatus · · · · · · ·	Open			Details     Attachments (0)	
				Phone No.		/								
					_///								Sell-to Customer Service History	
Lines Manage L	ine Function	s Order	Fewer option	5	_///_								Customer No.	40000
Service Item No. Ite		rvice Item oup Code	Serial No.	Description	Re dus Ce	War	Contract No.	Service Price Group Code	Fault Code	Resolution Code	Priority	Response Tir (Hou	0 1 0	0
→											Low		Quotes Orders Invoices C	redit Memos
4												•	Patel. Patel. Credit	
Invoicing												Show more	Shipments Pstd. Invoices Memos	
Bill-to Customer No.	40000		~	Salesperson Code	PS		~	Payment	Method Code ···	BANK		~	Service Item Line Details	
Bill-to Contact No.				Posting Date					bit Mandate ID			~	Service Item No.	
Bill-To				Document Date	4/12/2021			Currency	Code			~	Component List	0
Name · · · · · · · · · · · · · · · · · · ·	Alpine Ski Ho	ouse		Department Code			~	Prices Inc	luding VAT				Troubleshooting Skilled Resources	0
Address · · · · · · · · · · · · · · · · · ·	Walter-Gropi	ius-Strasse 5	5	Customergroup Code			~	VAT Bus.	Porting Group	EU		$\sim$		
City				Payment Terms Code · · · · ·	1M(8D)			Stripe Co	lleo Method ·	Send In	voice	~		
County				EU 3-Party Trade				and a second			andbox Account - ts Standard	Stripe		
Post Code				Due Date · · · · · · · · · · · · · · · · · · ·	5/12/2021					,				
Country/Region Code			~	Payment Discount % · · · · ·			2		(MAY					
Contact · · · · · · · · · · · · · · · · · · ·	Ian Deberry			Pmt. Discount Date	4/20/2021									
Shipping >											DE 80807	lan Deberry		
shipping /											DE-00007	lan Deberry		
Details >														

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).

Posted Sales Invoices: Al	I∨	e∨ Navigate∨	Correct ~	Print/Send 🗸 📲	Open in Excel	More options						
No. V Custon	ner No. Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Location Code	No. Printed	Closed Can	el Correc	Stripe Invoice L Available	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 35451	236 Gagn & Gaman	ISK	2/2/2022	88,164.00	88,164.00	88,164.00	YELLOW	0	No			
103026 35963	1852 Heimilisprydi	ISK	1/31/2022	203,417.25	203,417.25	203,417.25	YELLOW	0	No			-
103025 47563	218 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 01445	S44 Progressive Home Furnishings	USD	2/5/2022	2,310.38	2,310.38	2,310.38	YELLOW	0	No			- 1
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	6,654.9			~				
103001 10000	The Cannon Group PLC		2/24/2022	7,438.50		Y Y	=	$\odot$				-
103022 46897	889 Englunds Kontorsmöbler AB	SEK	1/31/2022	6,807.56								-
103021 49633	Autohaus Mielberg KG	EUR	1/29/2022	1,441								-
103028 10000	The Cannon Group PLC		2/19/2022	/ <	tripe							-
103020 32656	565 Antarcticopy	EUR	1/24/2022									-
103019 20000	Selangorian Ltd.		1/30/2022	/ "	nvoice		St	ripe Pa	yment			-
103031 30000	John Haddock Insurance Co.		1/31/2022	A	wailable			A	mount			-
103018 20000	Selangorian Ltd.		1/26/2022									-
103017 43687	129 Designstudio Gmunden	EUR	2/14/2022	_								-
103016 42147	258 BYT-KOMPLET s.r.o.	CZK	2/14/2022	3				6,3	<u>00.95</u>			-
103015 10000	The Cannon Group PLC		2/6/2022									
103014 49858	1585 Hotel Pferdesee	EUR	2/6/2022		12			4.0	11.07			-
103013 43687	129 Designstudio Gmunden	EUR	2/6/2022		1			1,2	511.87			-
103012 43687	129 Designstudio Gmunden	EUR	2/6/2022							- 88	/-	-
103011 43687	129 Designstudio Gmunden	EUR	2/6/2022	- \ r								-
103010 49633	663 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.

cs 365 Business Central			9 A Ø	? 🚺
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	Details     Attachments (0)	
No	Due Date	Order No.	Incoming Document Files ~	
Customer ······ The Cannon Group PLC	Stripe Invoice Click to view in Stripe	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		5		
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.	0 Total VAT (GBP)			
Total Excl. VAT (GBP) · · · · · · 5,250.				
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			
Shipping 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 *Receipts & Payouts from Stripe* page in Business Central reflects all transactions on your stripe account and offers the ability to post these transactions to your financials.

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

S All transactions - Chase Software × +			- 6 ×	
$\leftrightarrow$ $\rightarrow$ C $\textcircled{a}$ dashboard.stripe.com/acct_1Hrz10CcRRoINVYR/test/	/balance?currency=gbp&available_on%5Bgte%5D=1607040000&available	e_on%5Bite%5D=1607040000	x) 🏧 🔤 🖈 😗 🗄	
Chase Software ~	Q. Search		«O Feedback? 🖺 🤪 🚨	
		TEST DATA		
Payments Reviews	All transactions		▼     Filter     2	
Disputes	TYPE NET AMOUNT FEE	DESCRIPTION	AVAILABLE ON	
Payouts All transactions	Charge £3,460.63 £3,591.00 (£130.37) GBP	Payment for Invoice	Dec 4	
L Balances	Charge £2.092.99 £2.171.93 (£78.94) GBP	Payment for Invoice	Dec 4	
Customers Products	2 results		Previous Next	
Reports				
Develor Dynamics 365 Business Central     Viewing	nagement∨ <b>Stripe</b> ∨ Sales∨ Purchasing∨ Setup & Extensic	ons 🗸 Intelligent Cloud Insights 🗸 📔 🗮	Demonstration Q D 💿 ?	w
Stripe Receipts and Payouts: All $\sim$ $ ho$ Search	Transfer to Journal Refresh Page ~		∑ ≥ x □	
Entry Status Posting Date Description	Customer No. Customer Name Sales Document Status	Sales Document Type No. Sales Document Sales Document Type No. Currency Code Amount Incl. VAT	Exchange Stripe Payout Currency Rate Amount Fee Amount Net Amount Status	
New : 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	
New 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	

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

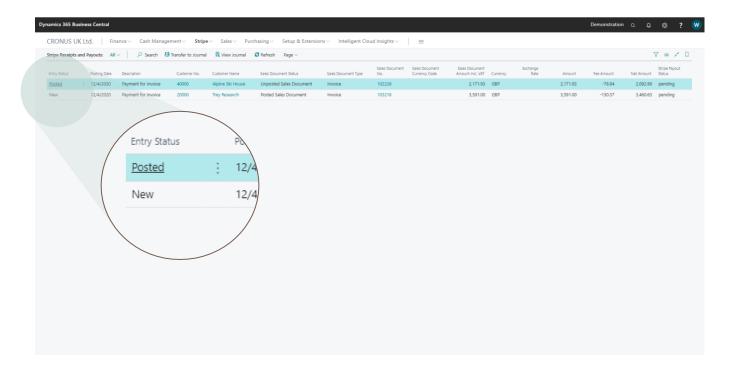
Stripe transactions still to be recorded in Business Central.

### 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 (	a 🗅	© ?	w
CRONUS UK Ltd.   Finance Cash Management Strip	✓ Sales ✓ Purchasing ✓ Setup & Extensions ✓ Intelligent Cloud Insights ✓ Ξ				
Stripe Receipts and Payouts: All $\vee$   $\rho$ Search 43 Transfer to Journal	R View Journal C Refresh Page V		7	7 🔳 💉	П
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 Incl. Wit Currency Rate Amount	Fee Amount N	Net Amount	Stripe Payout Status	
Posted : 12/4/2020 Payment for Invoice 40000	Alpine Ski House Upane Ski House Upane Ski House 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	
httes://buissesystal.isaamin_com/Di/20156-3077-4001-8466-7837-55315.ad/Personstat	gement Stripe Vie Transfer to Journal Vie Customer No. Custome 40000 Alpin 2000				

*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	Use default values from			~	Exchange Rate	Amount	Fee Amount	Net Amount	Stripe Payout Status
Posted	12/4/202			Alpine Ski		Last used options and filter	5	~		2,171.93	-78.94	2,092.99	
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

(-	General Jour															1			2	
	General Jour	als   Wo	irk Date: 4/	6/2020												√ Saved	1 L	μ Β	<u> </u>	
	Batch Name			DEFA	ULT															
	Manage	rocess	Payroll	Page Pos	st/Print Line	Account	Dpen in Excel Acti	ions Related Fewer options										Y	0	
	Posting Date		ocument ipe	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. Acc No.	ccount	Bal. Ge Posting Type	n. 9
	12/4/2020	1		20000	Customer	20000	Trey Research	Stripe Payment for Invoice 103218						-3,591.00		G/L Account				
	12/4/2020			20000	Bank Accou		Stripe Account	Stripe Receipt - Invoice 103218						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.

tus Pesting Date Description Customer Name Sates Document Sates Do	eepis and Payouts All V P Seach 🚯 Transfer to Journal 🛱 View Journal 🛱 Refresh Page V 🔍 🔍 Seise Document Sales Document S	ONI IS LIK 1±d	Finance	Cash Management	✓ Strine ✓	Sales - Purchasin	a 🗸 — Setun & Extensions 🗸	Intelligent Cloud I	nsights 🗸 💧	-			Demonstration		
Sales Document         Sales D	us Posting Date Description Customer Name Sales Document Sales							intelligent cloud i	longino -	-				7	7 = 24 [
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	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											Exchange			Stripe Payout
		Status								Currency Code		Rate			
		ted													
						,									

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.

Ale Sol S Bulknes C entral       Image       Image <t< th=""></t<>															
		,	Page Po	st/Print Line		ore options	<u>B</u> .							70	
			Document No.	Account Type	Account No.	Account Name	Description	Currency Code	Party		Amount	Amount (LCY)	Bal. Account Type		
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	CTRUPE										
				Same recovering	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.

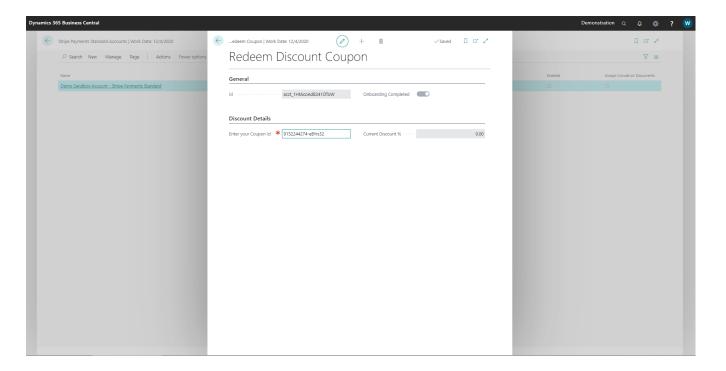
Make use of the Business Central search feature to find the Stripe Payments Standard page, as shown below:

Dynamics 365 Busines	ss Central						Demonstration	a <b>a</b>	٥	?	w
	Customers Vendors Items	ce -> Cash Management -> Stripe -> Bank Accounts Chart of Accounts	Tell me what you want to do					2			
	Want to lea	rn more about	Stripe Payments Standard Accounts     Administration	urchase Order urchase Invoice		Reports	Excel Reports				
	Business Ce	entral?	Documentation Show all (20) O WorldPay Payments Standard 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     Using the PayPal Payments Standard Extension								
	Sales This Month	Overdue Sales Invoice Over Amount Amo	Describes how to use the extension to enable customers to make payments with PayPal.								
	±0 >See more	£56,182 £.	Get from Microsoft AppSource Show all (57) 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	WorkIPW Payments Standard Ger paid Starbe y adding a line it to the WorkIPW Payments Standard on invoices. PayPai Payments Standard Adds a PayPai link to your sales documents so customers can easily pay using PayPail.	Camera	Incoming Docum My Incoming Documents		duct Videos				
	2 4	9	Didn't find what you were looking for? Try exploring	Create Incomin from Camera	1	Produ	luct Videos				

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

Dynamic	365 Business Central	Demonstration Q	٥	٥	?
¢	Stripe Payments Standard Accounts   Work Date: 12/4/2020		0 0	×	
	Search New Manage Page Actions     Fever-options		V	=	
	Redeem Discount Coupon			-12	
	Demo Sandbox Account - Stripe Payments Standard - Fee % 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:

nics 365 Business Central			Demonstration Q D 🧔
Stripe Payments Standard Accounts   Work Date: 12/4/2020	-edeem Coupon   Work Date: 12/4/2020 🔗 + 🖻 🗸 Saved 🛙 🗖 🗸		Dø,
🔎 Search New Manage Page 🛛 Actions Fewer opti	Redeem Discount Coupon		7 .
Name		Enabled	Always Include on Documents
Demo Sandbox Account - Stripe Payments Standard	General		
	Id ······ acct_1HtAcoAd82410ToW Onboarding Completed ·		
	Discount Details		
	Enter your Coupon Id ··· KeKittik Current Discount % ···· 5.00		
	Coupon successfully applied. Your account discount level has		
	been updated to 5%.		
	ок		

## 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:

	JK Ltd. Finance Jour	mals ~ Cash	n Managemen	t∨ Stripe∨	Cost Accounting ~ Fixed	Assets - Posted	Documents ~	Setup & Extensions ~	=					
ustomers:	All 🗸 🕴 🔎 Search 🛛 New 🗸	🖲 Delete	Process V R	eport $\lor$ New	Document ∨ Customer ∨ N	Navigate ∨ Prices &	Discounts 🗸 🛛 🕻	Open in Excel Actions	~ 1	Related $\lor$ Report	s ∨ Fewer opti	ions	$\nabla \equiv 0$	ř
No. †	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	New Document		Stripe Default Collection } Method	① Details	) Attachm	nents (0)	
01121212	Spotsmeyer's Furnishings		YELLOW		Mr. Mike Nash	0.00	0.00	Prices and Discounts	> 0.0	0 Send Invoic	-			
01445544	Progressive Home Furnishings		YELLOW		Mr. Scott Mitchell	1,499.03	0.00	Request Approval	> 0.0	0 Send Invoic	Sell-to Custo	omer Sales Hi	istory	
01454545	New Concepts Furniture		YELLOW		Ms. Tammy L. McDonald	222,241.32	0.00	Workflow	> 0.0	0 Send Invoic	Customer No.		011212	212
01905893	Candoxy Canada Inc.		YELLOW		Mr. Rob Young	0.00	0.00	Gash Receipt Journal	0.0	0 Send Invoio				
01905899	Elkhorn Airport		YELLOW		Mr. Ryan Danner	0.00	0.00	Sales Journal	0.0	0 Send Invoio	0	0	0	
01905902	London Candoxy Storage Cam		YELLOW		Mr. John Kane	0.00	0.00	C Apply Template	0.0	0 Send Invoio	Ongoing Sales	Ongoing Sales Blanket Orders	Ongoing Sales	
10000	The Cannon Group PLC (EUR)	BIRMINGHAM	BLUE		Mr. Andy Teal	185,274,42	-281.12		12.4	2 Send Invoio				
20000	Selangorian Ltd.				Mr. Mark McArthur	95.724.45	49,678.99	Display	14.7	1 Send Invoio	0	0	0	
20309920	Metatorad Malaysia Sdn Bhd		YELLOW		Mrs. Azleen Samat	0.00	0.00	Manage Stripe Customers	0.0	0 Send Invoio	Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos	
20312912	Highlights Electronics Sdn Bhd		GREEN		Mr. Mark Darrell Boland	0.00	0.00	0.00	0.0	0 Send Invoio	0	0	0	
20339921	TraxTonic Sdn Bhd		YELLOW		Mrs. Rubina Usman	0.00	0.00	0.00	0.0	0 Send Invoio	U U	U	0	
24222572	Constant of Consta		VELON		44 C - 2 4004C	0.00	0.00	0.00	0.0		Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts	

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.

							▽ 1				
	Stripe Customer Name		Stripe Customer Currency Code	Stripe Customer E-Mail	Stripe Customer Id 1	Cu	stomer No.	Customer Name			
			GBP		cus_HxC0g0TPEtjgle			_			
	→ Adatum Corporation		GBP		cus_lwzCJ7n835oosc	*		~			
	Trey Research		GBP		cus_J0fTUHoorAFXDv						
	Adatum Corporation		GBP		cus_J0R3LqGP2Fq9nK		No. 1	Name	Post Code	Phone No.	
							→ 01121212	Spotsmeyer's Furnishings	US-FL 37125		1
							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		-
							4				•
							+ New			Select from full	list