Payline: Email Invoicing

To ensure the security of our customer's data, our preferred method of gathering payment is to email the customer an invoice and have the customer enter their credit card information on their own device. This prevents any of the customer's payment data from being exposed to any of our users.

Things to keep in mind:

- Customers may complete the invoice while on the call OR complete the invoice later and call us back.
- Do not schedule a new DOLI job if the payment was not successful in Payline.
- Do not add SKUs to an existing DOLI job until you confirm the upsell payment was successful in Payline

To process a new payment:

1. Calculate the tax
2. Calculate any distance surcharges
3. Quote the customer the total price
4. If the customer does not already have an order you are upsell onto, use the New Order Entry form create the order in DOLI
5. **Does the customer have access to email or computer?** – Ask the customer if they have access to email on either a computer or smart phone.

   Suggested Verbiage: *"The total charges are ____. To keep your information secure, it is our practice to email you a link and allow you to securely process your payment. Do you have access to email by either a computer or smart phone?"*

6. Advise the customer of the next steps:
   - **Yes, has access:** *"Great! I need to get some preliminary information so that we can send you that link."*
   - **No access:** *"Unfortunately, we are unable to process a payment over the phone for customer security. When you have access to e-mail, please call us back to complete the order creation process. If you have any questions or when you are ready to setup your order, we can be reached at XXX-XXX-XXXX"*
7. Open Payline
8. Click on **Invoices**
9. Click on **Add Invoice**

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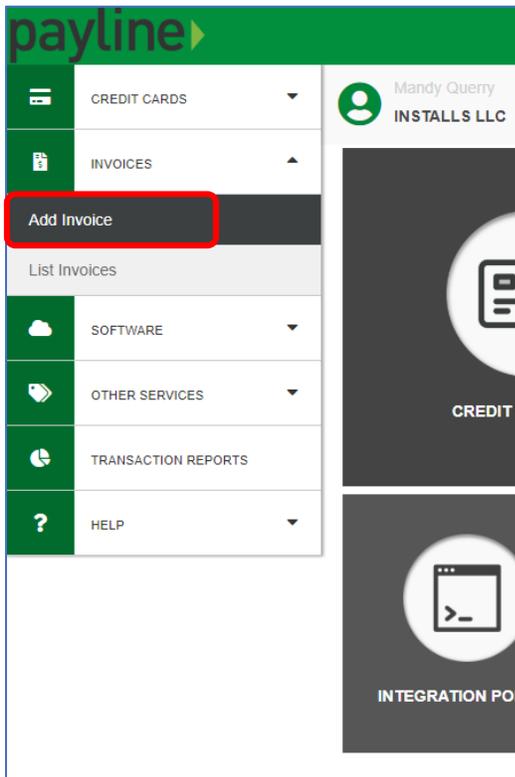
10. Enter the **Invoice Amount** – Total amount of charges: All SKUs, taxes, and distance charges.
11. Click on the SKU field and select **Add New**
12. **SKU** – Enter the DOLI SKU number.
13. **Description** - Enter Order Description from DOLI or SKU Name from the SKU list.
14. **Quantity** - Enter the number of SKUS
15. **Cost** – Enter the pre-tax SKU price
16. **Tax** – Leave blank
17. Repeat for each SKU
18. Enter a new SKU line and enter the total tax
    a. Choose **Add New**
    b. SKU – Tax
    c. Description – Tax
    d. Quantity – 1
    e. **Cost – 0**
    f. **Tax – Total amount of taxes**
19. **Sam's Club:** Enter a new SKU line and enter the distance surcharge
    a. Choose **Add New**
    b. SKU – Distance
    c. Description – Distance
    d. Quantity – 1
    e. **Cost – Total amount of surcharge**

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      f.   **Tax – 0**

20. Ask the customer for the address associated with the credit card and enter in **Card Billing Address** section
21. Enter the address where we are performing the service in the **Shipping Address** section
22. **Order ID** – Copy/paste the Job Number from DOLI
23. **Order Description** – Enter the client
24. **Tax** – Enter the dollar amount of taxes
25. Click on **Create and Send Invoice**

- **Has access now:** *"Great! I am going to send an email to [email address] with a link. The email will show as from Tara Gipp. Please open that email and click on the link within. I will stay on the line to make sure this goes through for you."*
- **Customer can do it later:** *"Great. I am going to send the email right now to [email address]. It will show as from Tara Gipp. When you have a chance please open the email and click on the link inside. You can call us back for scheduling once you have processed the payment."*
    - i. Put the order into **Waiting Customer Action – Pending Payment.**
    - ii. <mark>Check for successful transaction before scheduling any order in this status.</mark>
26. Once the customer tells you they have completed the payment, you will need to check that it went through in Payline.
    - a. If the customer cannot find the email, ask them to check their Junk/Spam folder for an email from Tara Gipp. The invoice may be there.

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27. Click on **Invoices**
28. Click the checkbox for **Include Paid Invoices**
29. Click **Submit**
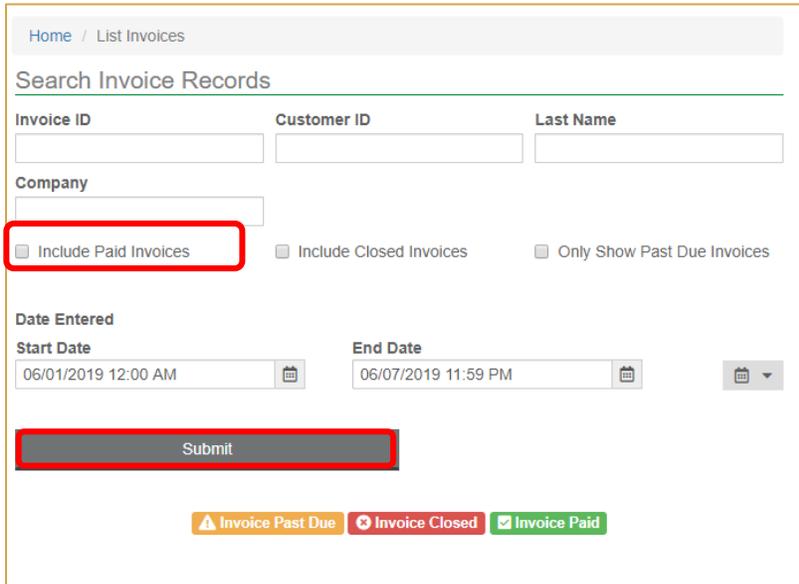
30. You will see a list of past transactions.   Confirm that the customer's payment was approved.
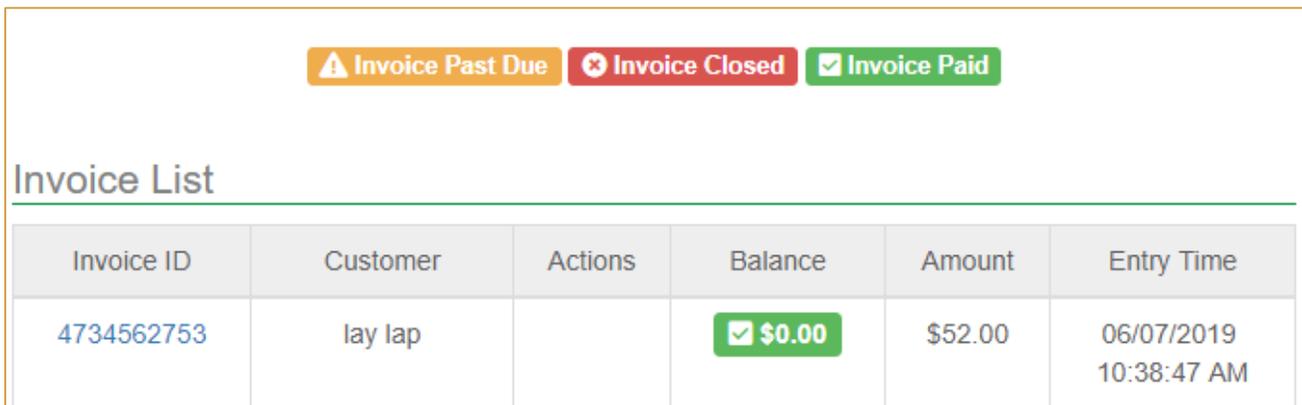
31. **Include the transaction ID in your DOLI job notes**.