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DEAR Stripe/Paypal integration and cross-user
sale invoices exchange explained

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Payment documents

DEAR generates electronic documents (PDF, e-mail content) to enable your customers to seamlessly pay quotes and invoices. Documents contain a link to a dedicated module and navigate customers through the DEAR Payment workflow. DEAR supports Stripe and PayPal as payment processors. Each generated document can contain "Pay links" for one or multiple payment processors.
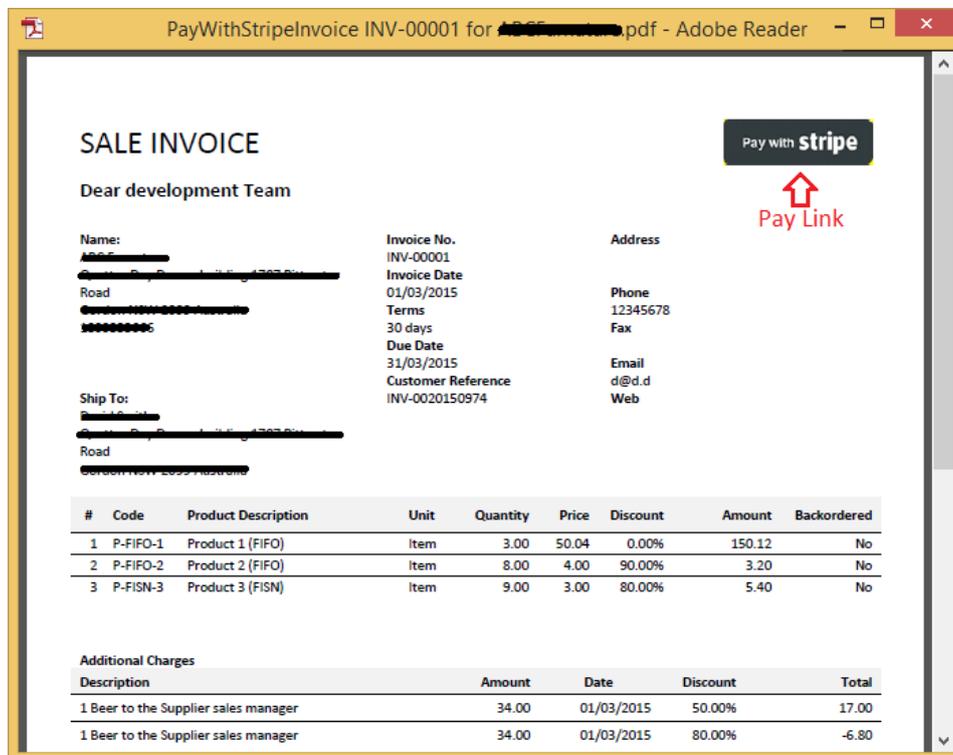

Sample of Stripe Link on the Invoice.
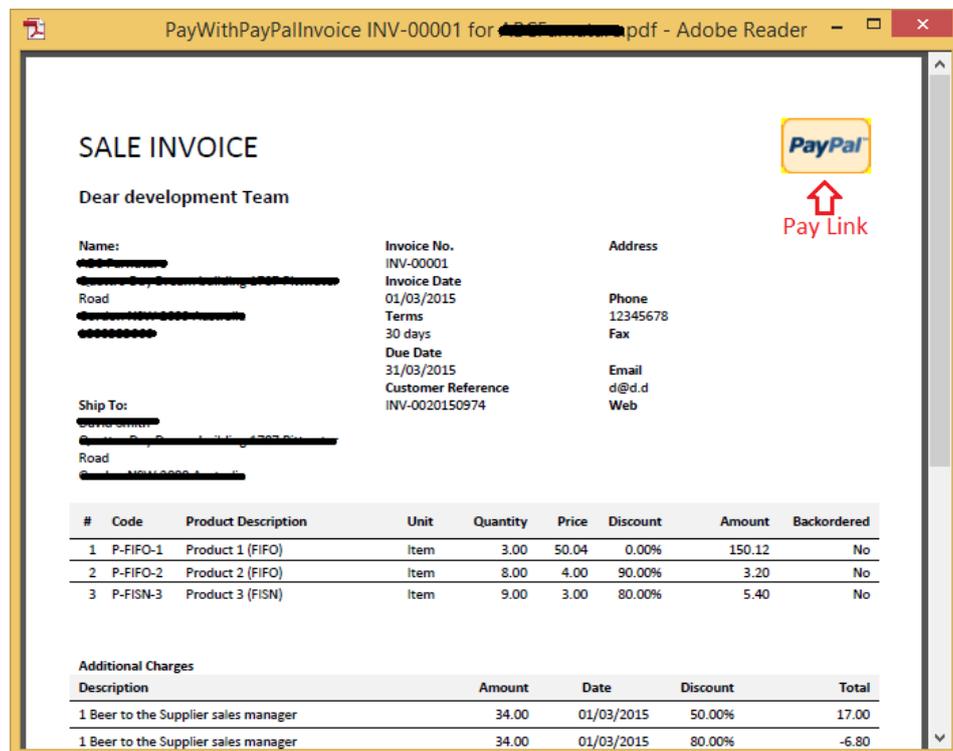
Sample of Paypal Link on the Invoice.
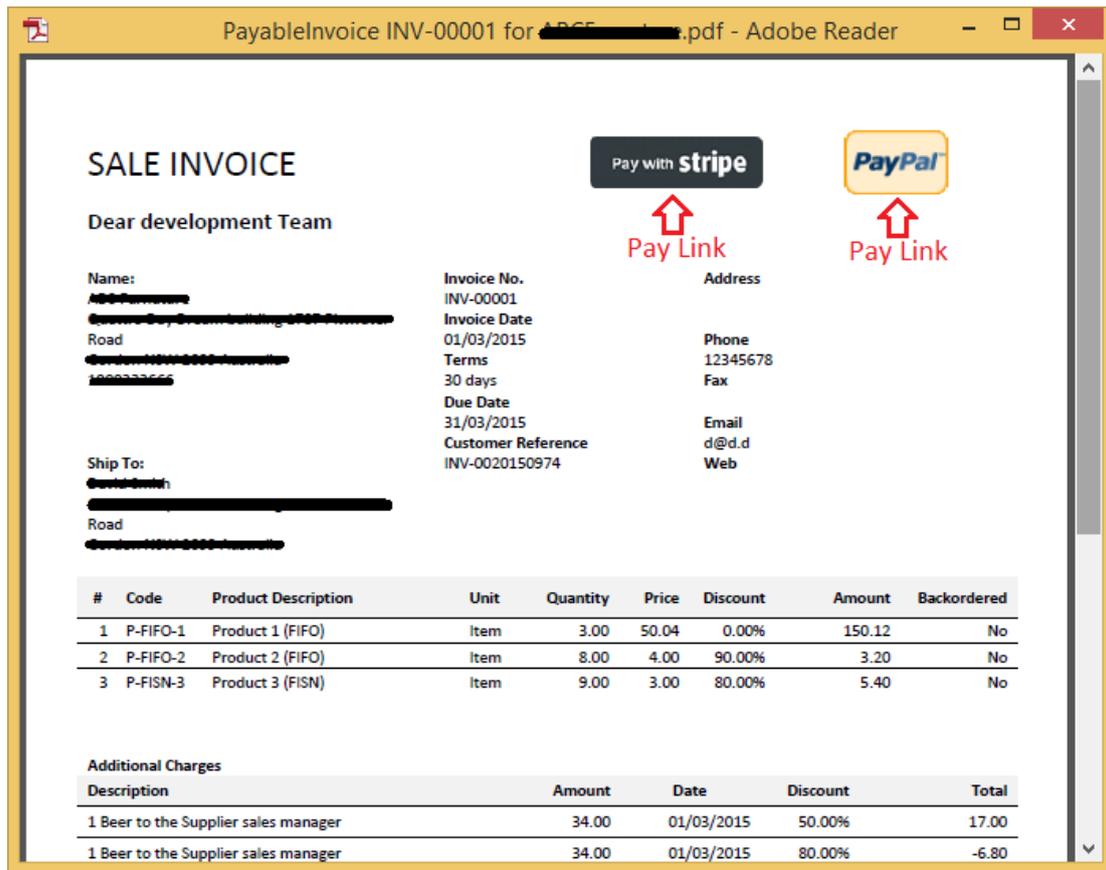
Sample of both Paypal and Stripe Links on the Invoice.

Each link redirects users to the DEAR Payment workflow with corresponding payment processor. First page of DEAR payment workflow contains a preview of document your customer is to pay, amount due, overdue days (if applicable) and "Pay now" button.
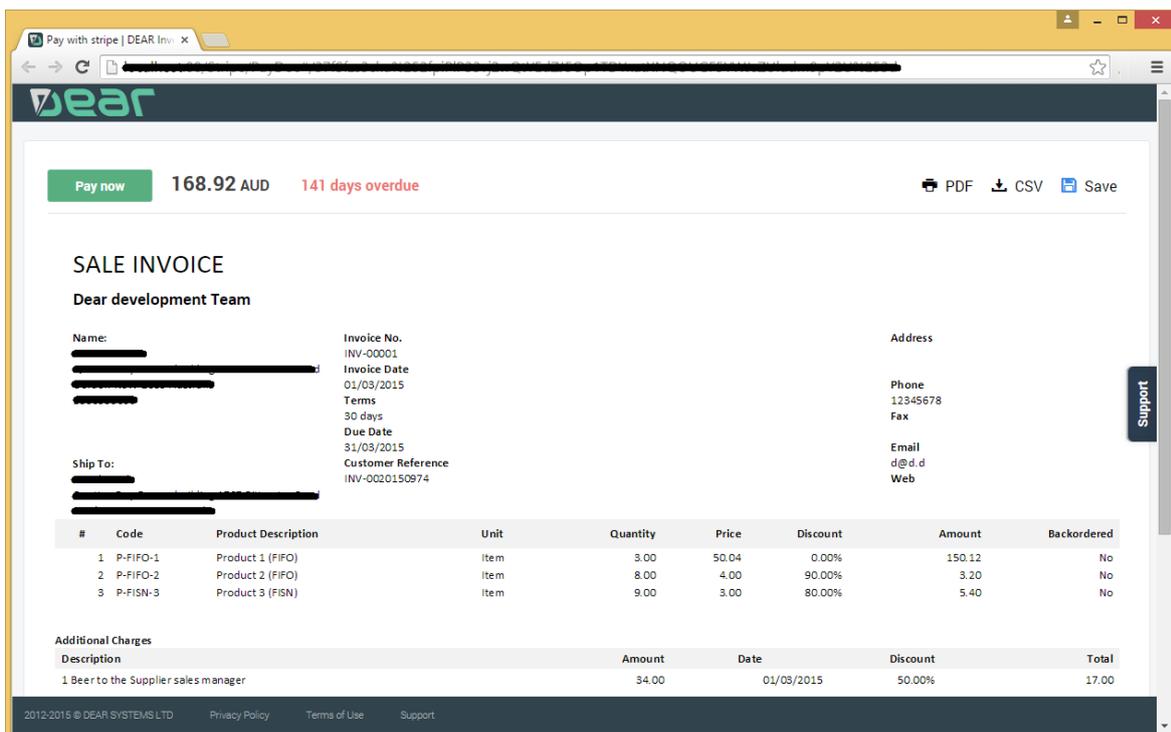
The next step depends on payment processor in use. In the case of Stripe, user will access a single payment page. In Paypal, several steps will be involved.
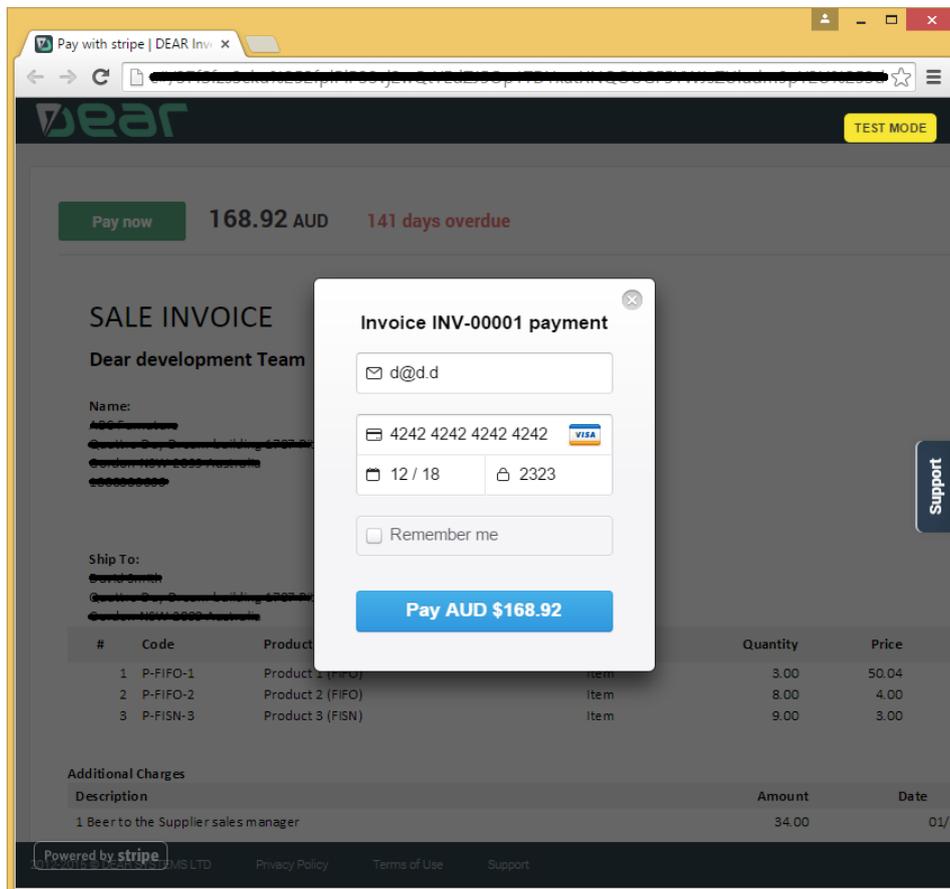
Sample of Stripe payment workflow step.
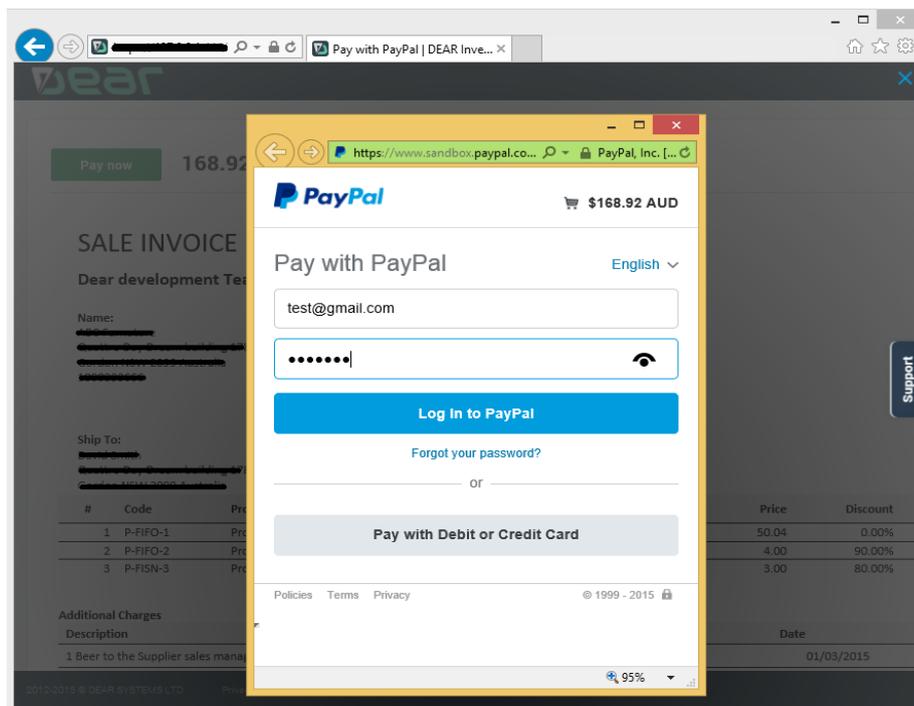
Sample of PayPal payment workflow step.

Types of payment documents

There are two types of payment documents:

- Sale Quote document;
- Sale Invoice document.

Documents generated from the "Sale Quote" template type belong to the "Sale Quote" payment documents. Documents generated from other template types belong to "Sale Invoice" payment documents.

You can find various template types available in Settings>Document and Email templates.

Sale Quote payment documents

A number of requirements should be met to enable "Pay Links" on generated Sale Quote documents:

- Payment processor should be configured;
- Sale Quote should be authorized;
- Pre-Payment account should be configured on account mapping page;

Amount to pay for Sale Quote documents is calculated as difference between Sale Quote Total and all Payments/Prepayments.

After successfully completing the payment workflow, a Prepayment record is created with Account defined on Payment processor settings page.

Sale Invoice payment documents

A number of conditions should be met to enable "Pay Links" on generated Sale Invoice documents:

- Payment processor should be configured;
- Sale Invoice should be authorized;

Amount to pay for Sale Invoice documents is calculated as difference between Sale Invoice Total and all Payments/Prepayments.

After successfully completing the payment workflow, a Payment record is created against the relevant invoice.

Inserting Pay Links

There are two ways to insert Pay Link into a document template: with a standard Pay Link image and with a custom Pay Link image (See mail merge fields documentation for more details).

Standard PayLink image

Use mail merge field { MERGEFIELD StripePay} on document template and it will be replaced by the Stripe Pay Link image. (For the PayPal payment processor use { MERGEFIELD PayPalPay} merge field).

Custom PayLink image

Use field with code { IF "{MERGEFIELD StripePayLink}"=="" "<CustomImage>" "<CustomImage>" }
and this field will be replaced by PayLink with the specified <CustomImage>. (Use PayPalPayLink mail merge field for the PayPal payment processor).

Stripe Payment processor settings

You need to establish connection between DEAR and Stripe Account to enable Stripe payment processor. Copy "Secret Key" and "Publishable Key" from the Stripe Account (https://dashboard.stripe.com/account/apikeys) and paste them into DEAR. You can use Live keys and Test keys.
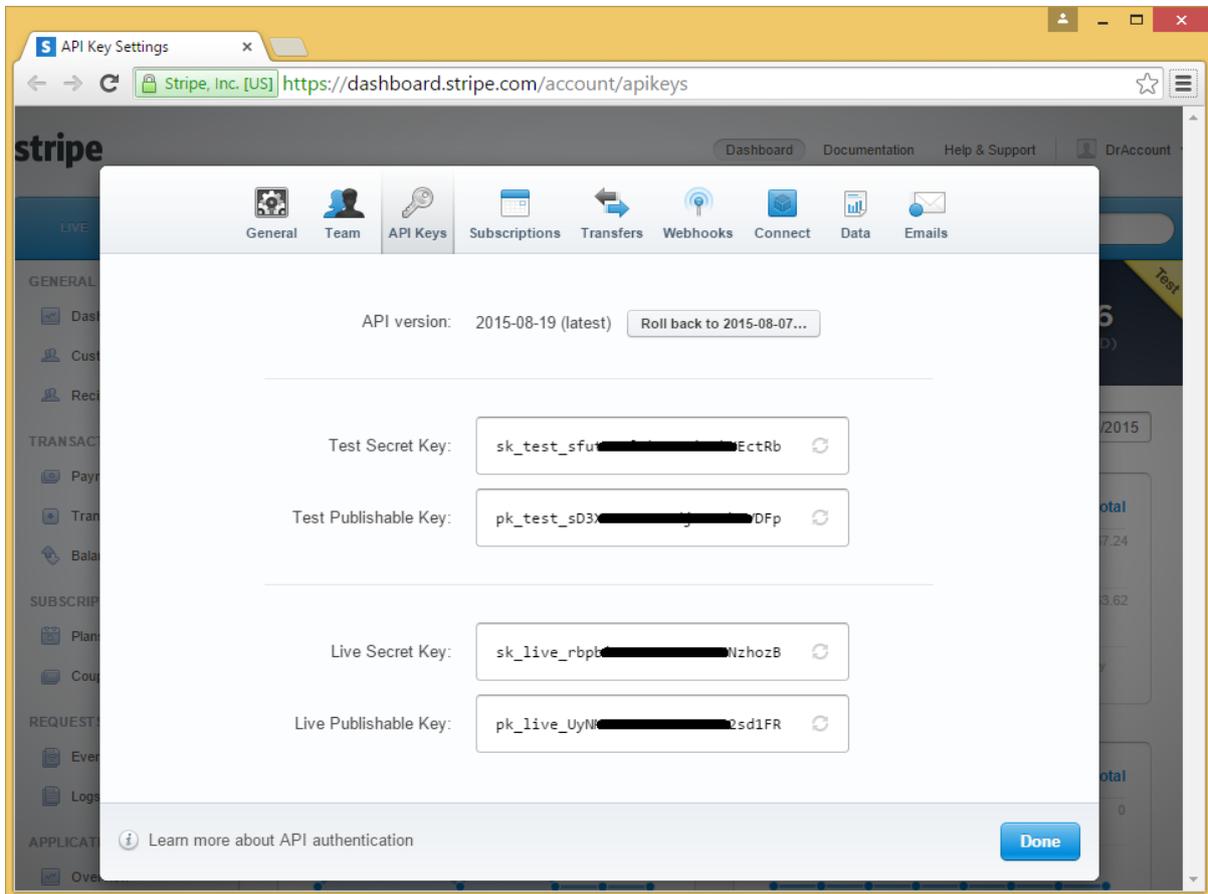

You will also need to choose an Account that will be used in sale payment/prepayment lines.

PayPal Payment processor settings

You need to establish connection between DEAR and PayPal Business Account to enable PayPal payment processor.

1. Copy Merchant ID (PayPal account ID) from the PayPal Business account profile page (https://www.paypal.com/webapps/customerprofile/summary.view).
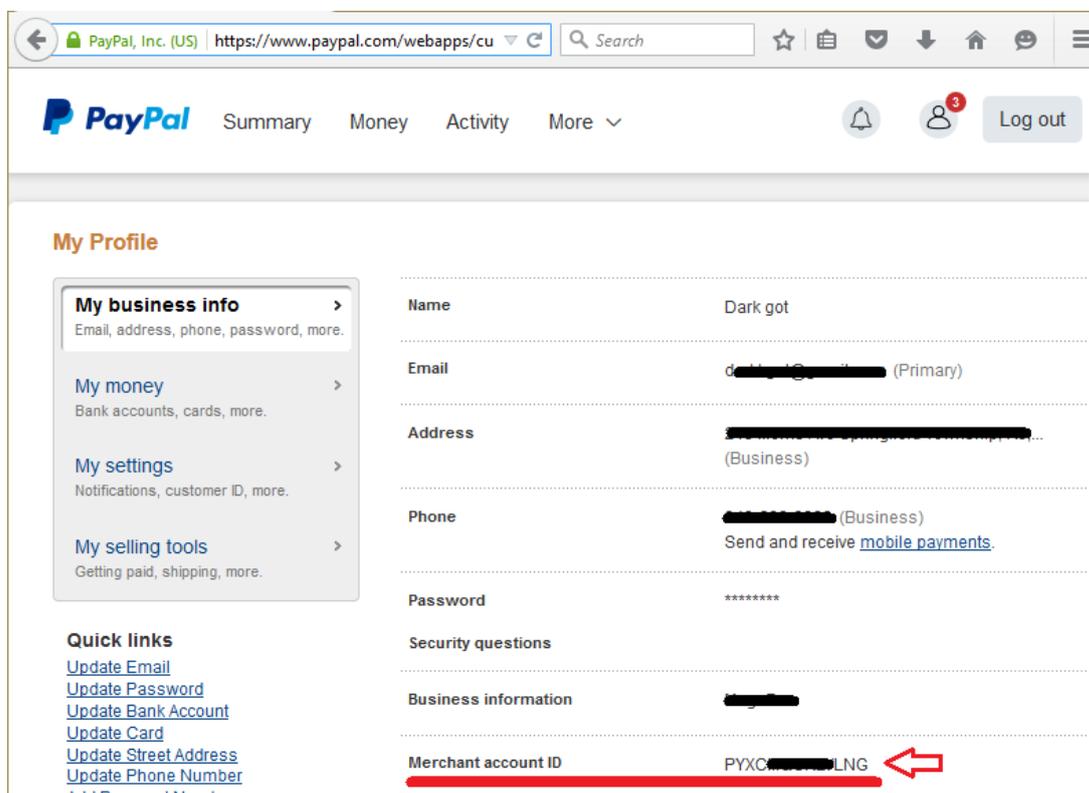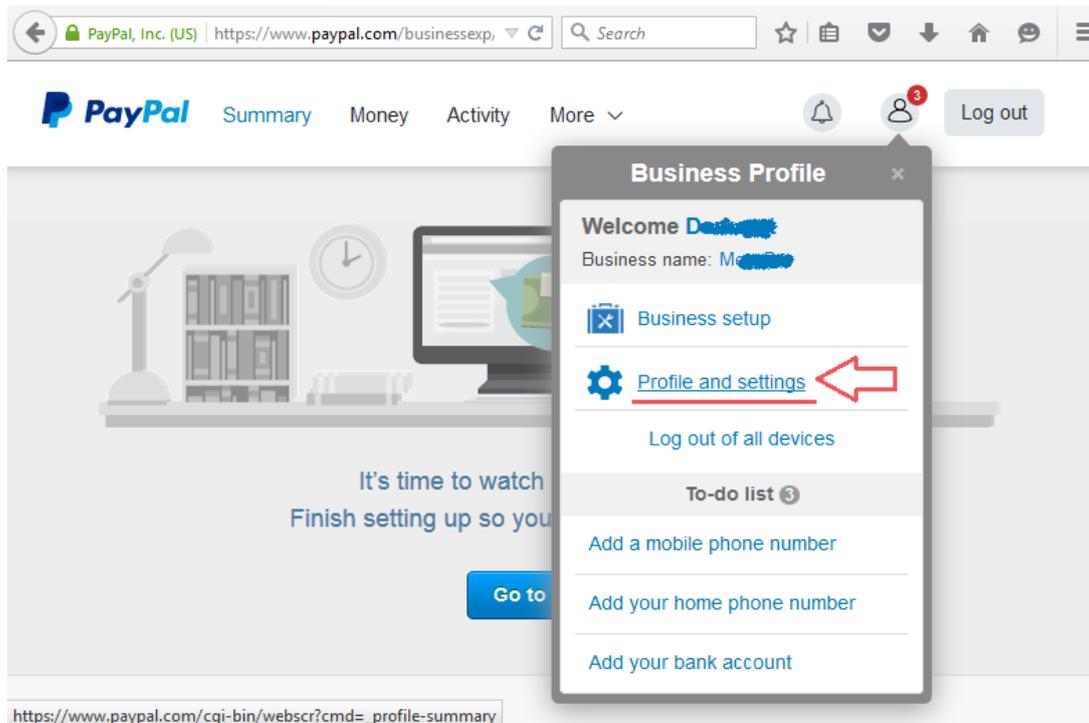
2) Create PayPal Business Account integration keys (REST API keys) for DEAR at the Developer Dashboard (https://developer.paypal.com/developer/applications/create).
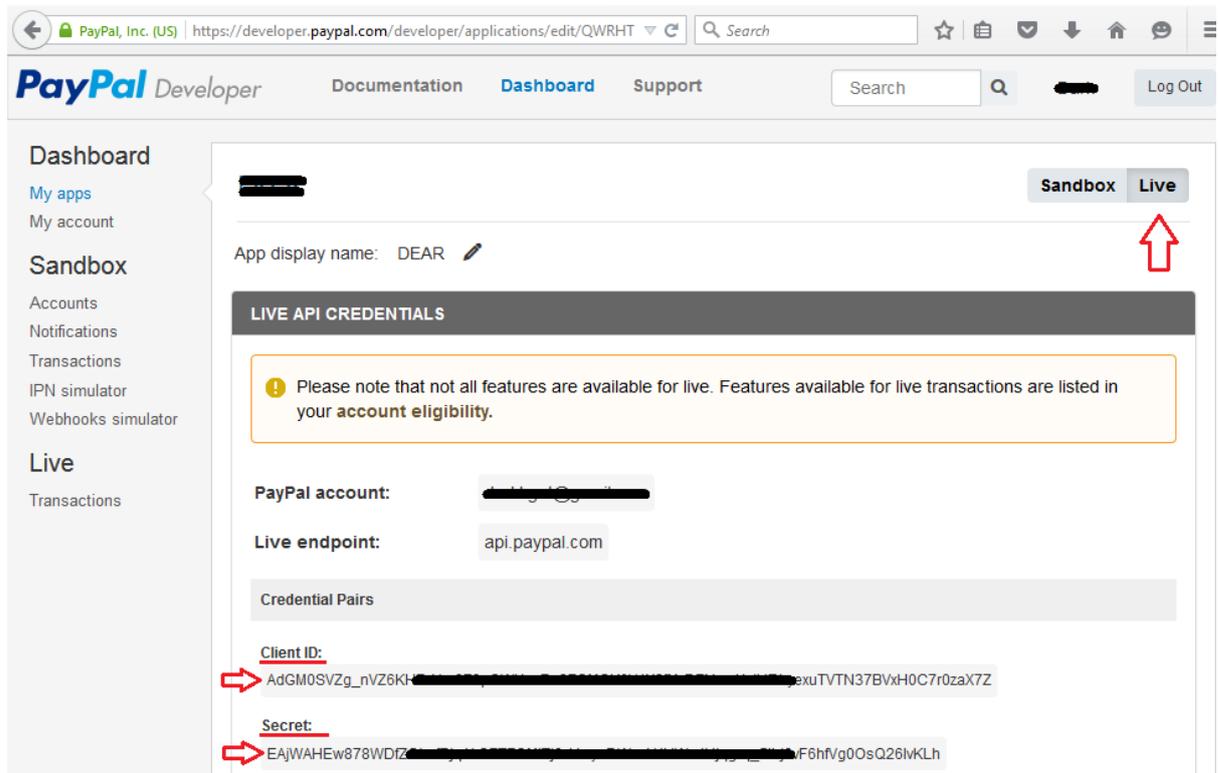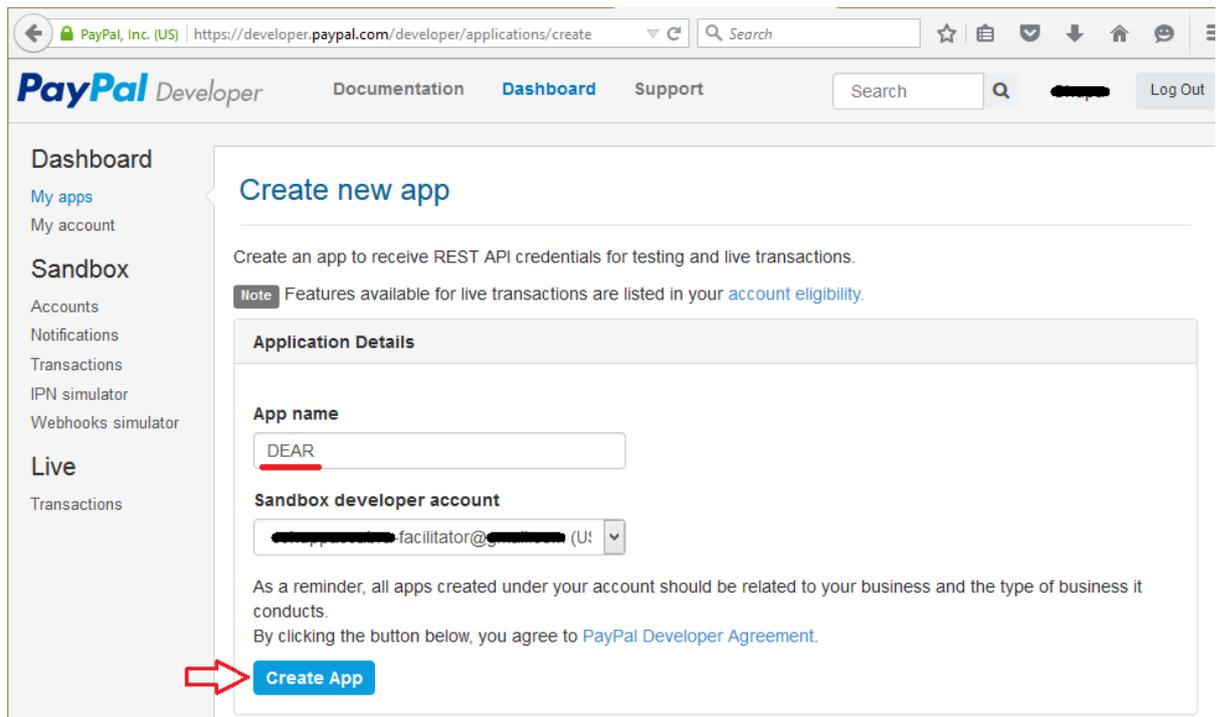
3) Choose Account that will be used in sale payment/prepayment lines.

Sale invoices exchange for DEAR Inventory users

Import Sale Invoice Payment document as Purchase Invoice into a customer's DEAR Account

If both supplier and customer are DEAR users, a payment document corresponding to a sale invoice can be imported by customer as purchase invoice directly into the DEAR account by using Save option on the payment screen. This feature will help eliminate unnecessary data entry for the customer.

Export Payment document as PDF

Clients can export documents they are paying into PDF for reference purposes.

Export Sale Invoice Payment document as CSV

Clients can export documents they are paying into DEAR Purchase CSV file format. This might be useful for import of data to a 3-d party accounting application used by the client.