POM Payment Service

Get paid faster via QR codes and payment links.

POM offers solutions to send invoices, receive payments and manage debtors. With the POM Payment Service app you can connect Microsoft Dynamics 365 Business Central with the Payment Service API of POM.
The API will be used to create Universal QR payment codes, which can be included in the layouts of the invoices.
When scanning the QR code the payment data is automatically recognized and the (mobile) payment can be done immediately.

More information about POM can be found on the website: www.pom.be.

Remark: in order to use POM Payment Service, an account from POM is necessary. Make sure this account is active before starting the trial of the POM Payment Service app.

1. Extension
POM Payment Service comes as single Microsoft Dynamics 365 Business Central Extension. To install the extension, you search for POM Payment Service in the Marketplace.
The app can be installed as "Free Trial" and after the trial period the license can be replaced by a paid license (contact your local Microsoft Dynamics 365 Business Central partner).

Remark: the app has a dependency on the Dynavision Connect Extension, hence this extension will be installed automatically when installing POM Payment Service and should not be deleted.

2. Purpose
This app has been created to integrate the POM Payment Service in Microsoft Dynamics 365 Business Central.

3. Prerequisites
A Sender ID, Sender Contract number, Account ID and Password will be needed in order to complete the required setup.
This information is provided by the POM Customer Department or can be retrieved from the POM customer portal.

4. Configuration
Following setup needs to be configured:

- App license,
- POM Payment Service, and
- Payment Methods.

4.1. App License

After the installation of the POM Payment Service App in a production environment, the license needs to be activated in Business Central.

The activation of the license can be found in the Get Started Manual of Dynavision.

4.2. POM Payment Service

Once the license is activated the POM Payment Service can be configured.

1. Choose the search icon, enter **Payment Services**, then choose the related link.
2. Choose the action **New** to add a new Payment Service.
3. In the **Select Payment Service Type** screen that opens, choose **POM Payments** and choose **OK**.
4. The **POM Payments Setup** page opens in which the configuration of the service can be completed.
5. Fill in the necessary fields. The mandatory field information will be given by the POM Customer Department, or can be retrieved from the POM customer portal.
   a. The procedure that POM follows, is that the connection is first set up to a **Beta** environment of POM. This beta environment is used to test the service using a minimal payment. This will make sure that everything is set up correctly.
   The value in the field **API Endpoint** needs to be set to **Beta**.
6. Make sure the **Enabled** toggle is set to active in order to start using the payment service.
7. After filling in the required information, it is possible to test the connection by choosing the action **Test Authentication**.
8. After the successful validation of the test in beta mode, the **live** environment will be made available to connect to with the Business Central environment.
   a. Once the Live environment is available, change the **API Endpoint** to **Production**.

4.3. Payment Methods

Choose the action **Payment Methods** on the **POM Payments Setup** page or by choosing the search icon, entering **Payment Methods**, and choosing the related link.

A POM Payment method will have been added automatically to the list of Payment Methods.

Complete the setup of this Payment Method by specifying the **Balance Account Type**, the **Balance Account Number** and the **Default Payment Service**.

The **Balance Account Number** that needs to be selected here is the bank account of the company which will be used in the QR Code and specifies the bank account that will retrieve the payment from the customer.

To set the **Default Payment Service**, click the flowfield to open the selection page. On this page, select the correct payment service that has been configured previously.

Remark: it's possible to create additional payment methods using the same POM Payment Service, but with different POM Bank Accounts. Depending on the selected payment method the QR code will include a different bank account to receive the payments.

5. Usage of the POM Payment service

After configuring the payment method, it can be set on the Customer Card. Navigate to the **Customer Card** and select the Payment Method in the field **Payment Method Code.** *(This field can be found in the Payments Tab.)*
This setting will be inherited on the sales documents created for this customer.

Remark: all other standard functionalities for payment services remain available (see online documentation of Microsoft Dynamics 365 Business Central).

On the invoice created for the document that contains the Payment Method POM and the document is printed, mailed or previewed, a QR code will be generated with the payment link.

The standard layout for Posted Sales Invoice includes a placeholder for the Payment Service. This placeholder is filled in with the generated QR Code.
For resizing or positioning of the QR Code on the layout, or integrating the QR code on custom layouts, please contact your Microsoft Dynamics 365 Business Central Partner.

The information can also be added to a custom created RDLC report. The custom report should contain the dataset item with the Payment Reporting Argument to support the printout of the QR code.
This is a similar design as the standard BC sales invoice.

Remark: the screenshot of the example shows the QR Code with optimized size and position on the Dynavision Report Layout application – see marketplace for this additional app.

QR codes will only be updated and included in the layout if the due date of the corresponding customer ledger entry has not expired.
If the due date is expired, the QR code will no longer be printed.

If a new QR code needs to be generated, the user can navigate (*using find entries*) to the corresponding customer ledger entries of the posted sales invoice to set a new due date on a future date.

6. Update QR code manually

On the **Posted Sales Invoice**, the function **Update Document** can be chosen in order to change the Payment Service on the invoice.

When this action is chosen, a page opens. In this page, the **Payment Method Code** and **Payment Service** can be edited.

A new QR Code can be generated, after changing the Payment Service and Method to POM Payments, by choosing the action **Generate New QR Code**, which can be found by selecting the three dots next to the title of the page and choosing **Actions**.

Remark: this action will not generate a new QR Code if the due date of the corresponding customer ledger entry has expired. If the due date is expired, the QR code will not be generated.

If a new QR code needs to be generated, the user can navigate (find entries) to the corresponding customer ledger entries of the posted sales invoice to set a new due date on a future date.

Remark: the Company Bank Account is not used for POM Payment service, this setting is for printing the bank account in the footer. (For POM Payment Services the Bank Account from the payment method is used.)

7. Structured message in POM QR code

If Dynavision Advanced Finance BE is installed on the environment, the structured message will be automatically generated for the sales invoice and this message will be included in the generated POM QR code.

In case there is no Dynavision Advanced Finance BE installed, it is still possible to include a custom structured message while generating the POM QR code.

To make this possible, there is a publisher added that can be used. The information with sample code is noted in the Support manual of Dynavision.

8. POM Entries

The payment links that have been generated for the POM Payments are stored in the table **POM Entries**.

1. Choose the search icon, enter **POM Entries**, then choose the related link.
2. The page that opens contains an overview of the generated QR codes with their linked document.

Each time a payment link is generated for an invoice using the POM Payments Service, the system checks for the posted sales invoice if a record already exists in this table.

If a link has been found, the same link will be used on the document. If no link is found, a new payment link will be created.

The conditions to create a new link are:

- *'Amount on QR code'* is not equal to the *remaining amount* on posted sales invoice.
- *'Payment Link Expiration Date'* is lower than the system date.

The payment link generated contains the following information:

- Authentication information,
- Document number,
- Total payable amount,
- Due date,
- Payment reference , and
- Bank account.

Remark: if the Dynavision Advanced Finance BE app (see marketplace) is used, the structured message is used instead of the payment reference in the payment link.