



Method:CRM Legacy Payment Gateways

Setup Guide

Updated April 9, 2020

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About Payment Gateways

Method:CRM allows you to accept credit card payments directly within Method. This is done by configuring payment gateways.

As of April, 2020, Method upgraded the payment gateway service to provide more integrations as well as the ability to provide recurring payments.

However, if you still have the legacy payment gateway service enabled in your account, this document will detail how to add the following Merchant Services.

Supported Merchant Services

Method currently provides support for the following merchant services:

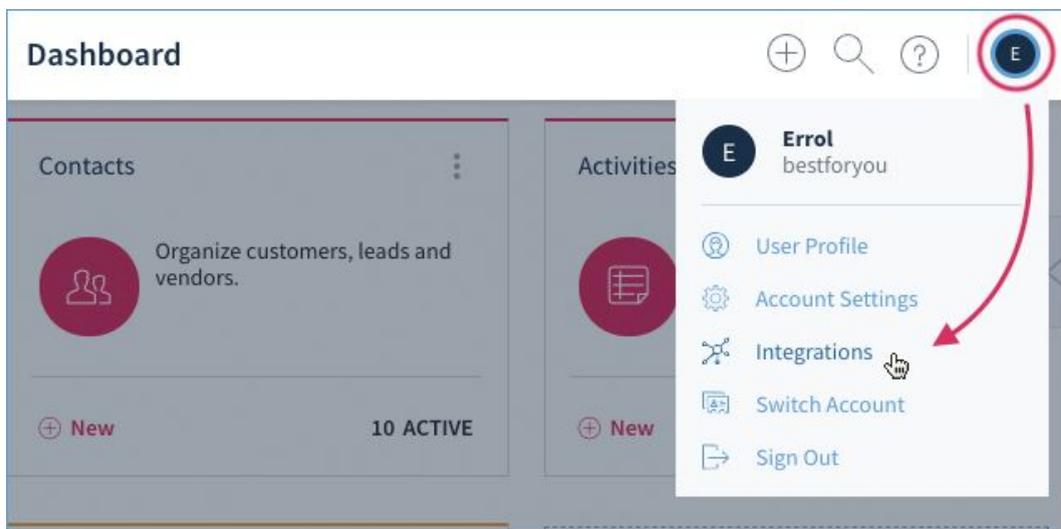
- **Authorize.Net**
- **Intuit QuickBooks Payments**
(For U.S. versions of QuickBooks Online only)
- **PayPal Credit Card**
- **PSIGate**
(Requires further customization to implement on transactions.)

NOTE: *If you have two or more payment gateways, the payment widget used to accept payment within the transaction screens will show only one payment gateway. You cannot choose between different payment gateways (e.g. Authorize.NET for e-cheque and PayPal for credit cards).*

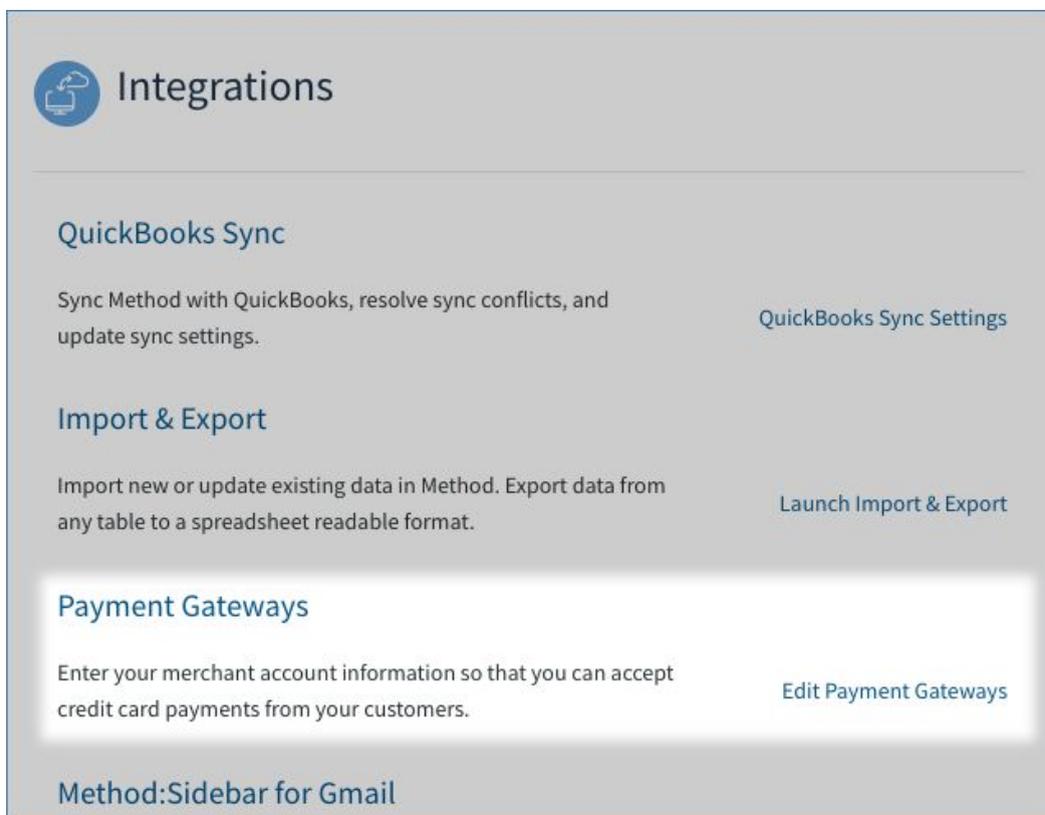
If you need to have more than one payment gateway, this will require customization, however there are further restrictions depending on the payment gateway provider.

How to Navigate to Payment Gateways in Method:CRM

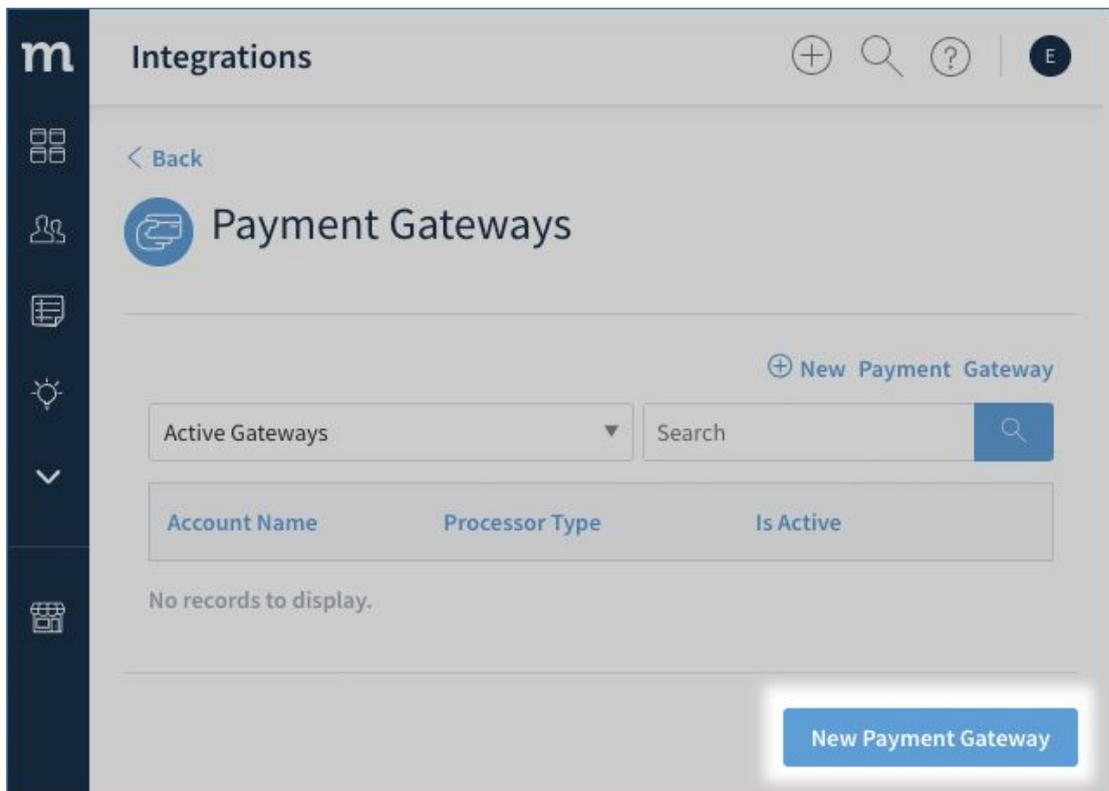
1. Click **blue icon** in the upper right corner then choose **Integrations**



2. Click **Payment Gateways**.



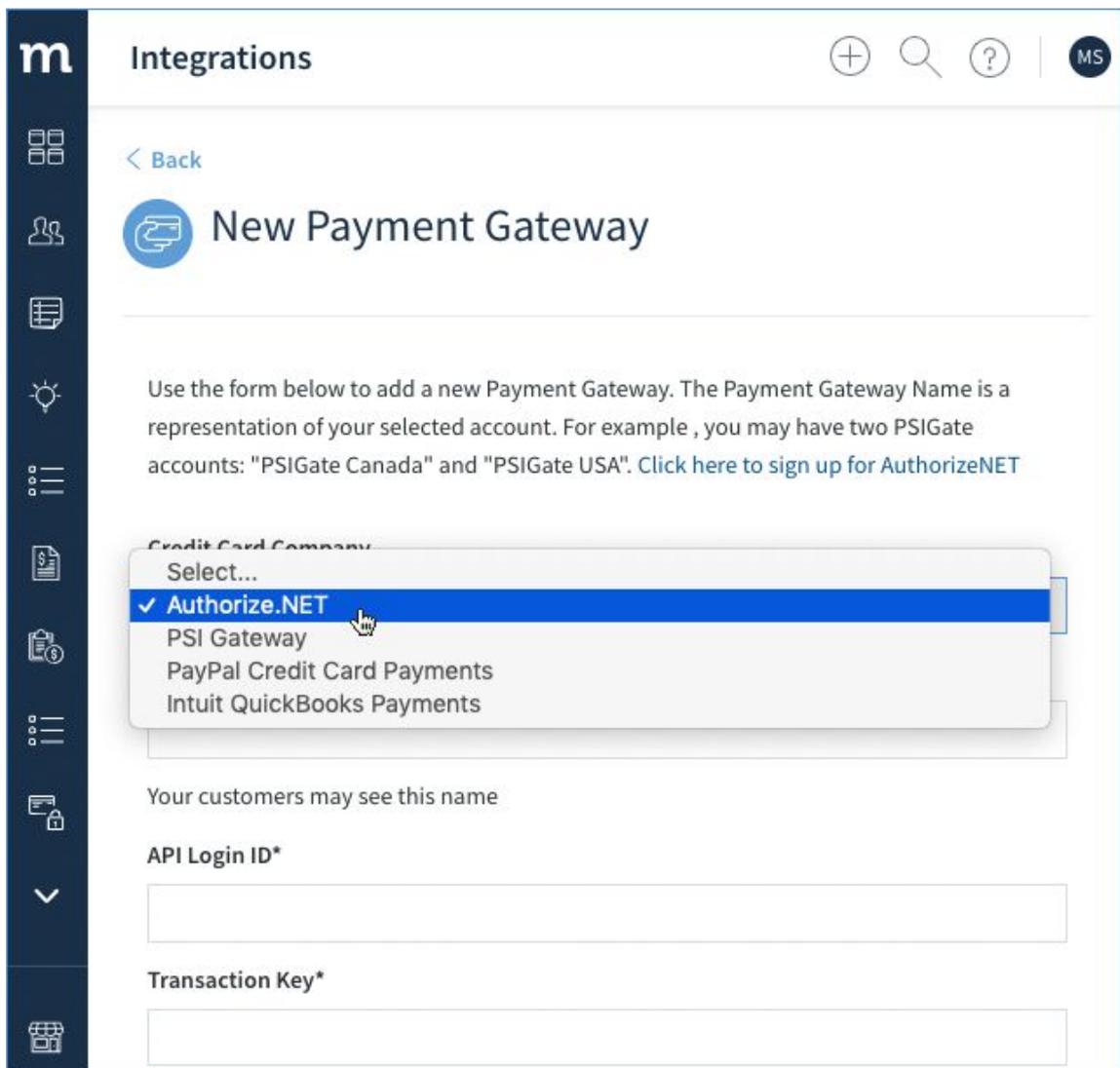
- This opens your *Payment Gateways List*, where you can view your active and inactive gateways. Select either link which adds a **New Payment Gateway**.



Configuring Authorize.Net

[Authorize.net](https://authorize.net) is one of several payment gateways that can be used to accept credit card payments through Method's Payments App. Before you can use Authorize.Net to accept payments, you must **sign up for a merchant account** (if you don't already have one) and then follow these steps to set up the gateway in your Method account.

1. Navigate to *Payment Gateways* in Method:CRM.
2. From the *Credit Card Company* dropdown, choose **Authorize.net**.



The screenshot shows the 'Integrations' section of the Method:CRM interface. The page title is 'Integrations' and the sub-section is 'New Payment Gateway'. A 'Back' link is visible. The main heading is 'New Payment Gateway' with a credit card icon. Below the heading, there is a text block: 'Use the form below to add a new Payment Gateway. The Payment Gateway Name is a representation of your selected account. For example, you may have two PSIGate accounts: "PSIGate Canada" and "PSIGate USA". [Click here to sign up for AuthorizeNET](#)'. A dropdown menu for 'Credit Card Company' is open, showing options: 'Select...', 'Authorize.NET' (selected with a checkmark and a mouse cursor), 'PSI Gateway', 'PayPal Credit Card Payments', and 'Intuit QuickBooks Payments'. Below the dropdown, there are three input fields: 'Your customers may see this name', 'API Login ID*', and 'Transaction Key*'. The left sidebar contains various navigation icons, and the top right has utility icons (plus, search, help) and a user profile icon labeled 'MS'.

Setting Up Authorize.Net as a Payment Gateway

All fields marked with an asterisk (*) are required to set up the gateway.

NOTE: The defaults you set up here will be overridden by the fields on the New/Edit Payment screen if they don't match, so ensure you fill out those fields with the same information.

New Payment Gateway

Use the form below to add a new Payment Gateway. The Payment Gateway Name is a representation of your selected account. For example , you may have two PSIGate accounts: "PSIGate Canada" and "PSIGate USA". [Click here to sign up for AuthorizeNET](#)

Credit Card Company

Authorize.NET

Payment Gateway Name*

Your customers may see this name

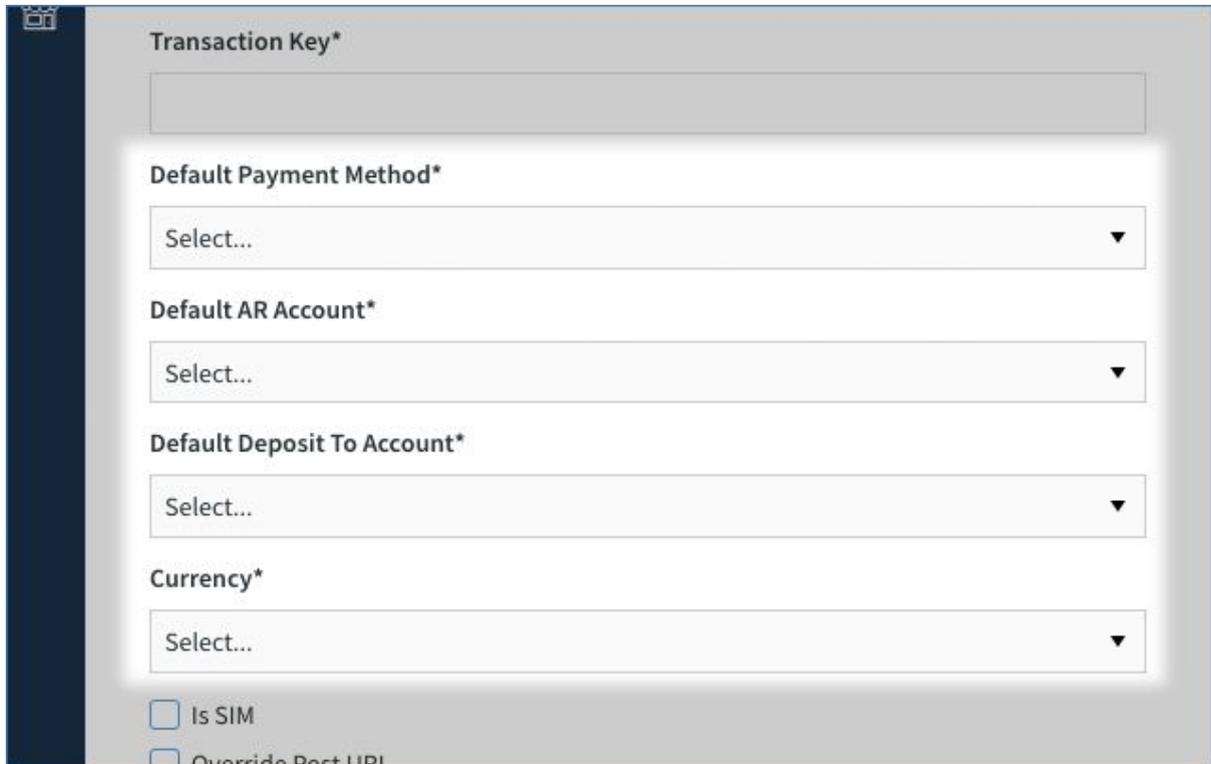
API Login ID*

Transaction Key*

Default Payment Method*

- **Payment Gateway Name***: This is the name that will appear in the dropdown. If this gateway appears in a customer portal, it will be visible to your customers.
- **API Login ID* / Transaction Key***: These two unique pieces of information are used to set up and authenticate a connection between

your merchant account and Method. To learn more about setting up your API ID and key, see [Authorize.Net's documentation](#).

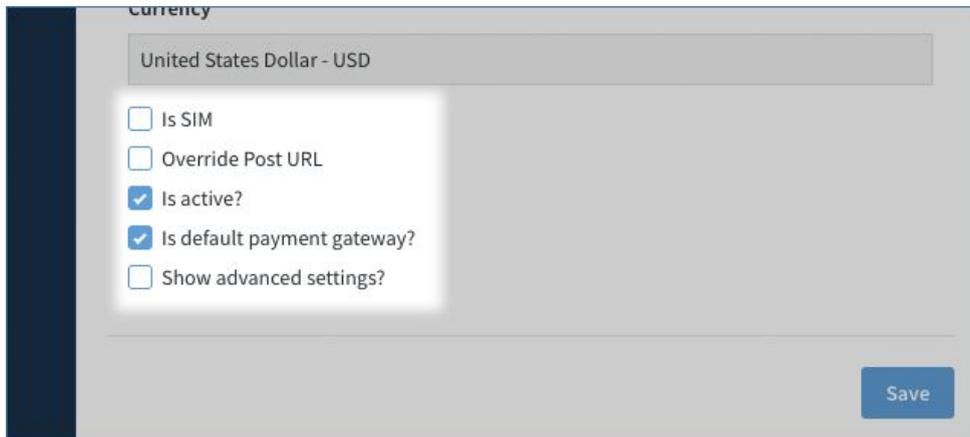


The screenshot shows a configuration panel with the following fields:

- Transaction Key***: A text input field.
- Default Payment Method***: A dropdown menu with "Select..." and a downward arrow.
- Default AR Account***: A dropdown menu with "Select..." and a downward arrow.
- Default Deposit To Account***: A dropdown menu with "Select..." and a downward arrow.
- Currency***: A dropdown menu with "Select..." and a downward arrow.
- Is SIM
- Override Post URL

- **Default Payment Method***: The payment method most likely to be used. In a gateway, this is probably a credit card.
- **Default AR account***: This dropdown is populated by QuickBooks, but does not appear for QuickBooks Online users.
- **Default Deposit To account***: The account where money is initially deposited, also populated by QuickBooks.
- **Currency***: Assign a currency and choose whether to make it the default for this gateway. Authorize.Net gateways are locked to a specific currency. Please check and ensure this currency is set with the settings of the account. It's a Method best practice to assign a default currency that coincides with the currency most of your customers will use to pay you.

The following checkboxes represent non-required options.



The screenshot shows a configuration form for a payment gateway. At the top, there is a dropdown menu for 'Currency' set to 'United States Dollar - USD'. Below this, there are five checkboxes: 'Is SIM' (unchecked), 'Override Post URL' (unchecked), 'Is active?' (checked), 'Is default payment gateway?' (checked), and 'Show advanced settings?' (unchecked). A blue 'Save' button is located at the bottom right of the form.

- **Is SIM:** is a secure hosted payment form for merchants that don't have an SSL certificate. Authorize.net does not recommend using this unless your provider requires it. Learn more.
- **Override post URL:** gives you the option to use any credit card processor that uses the same API as Authorize.net. You should not use this option unless you are given a URL by your gateway provider.
- **Is active?:** Flag this gateway as active, which means it appears in the active gateways list and in payment gateway dropdowns.
- **Is default payment gateway?:** The default payment gateway used for all payments.

By checking **Show advanced settings**, a section for advanced settings is revealed.

is default payment gateway:

Show advanced settings?

Accepted Bank Account Types Default

Business Checking

Checking

Savings

Payment Methods

Activate Credit Card

Available on Guest Pages

Available on Public Pages

Activate eCheck

Available on Guest Pages

Available on Public Pages

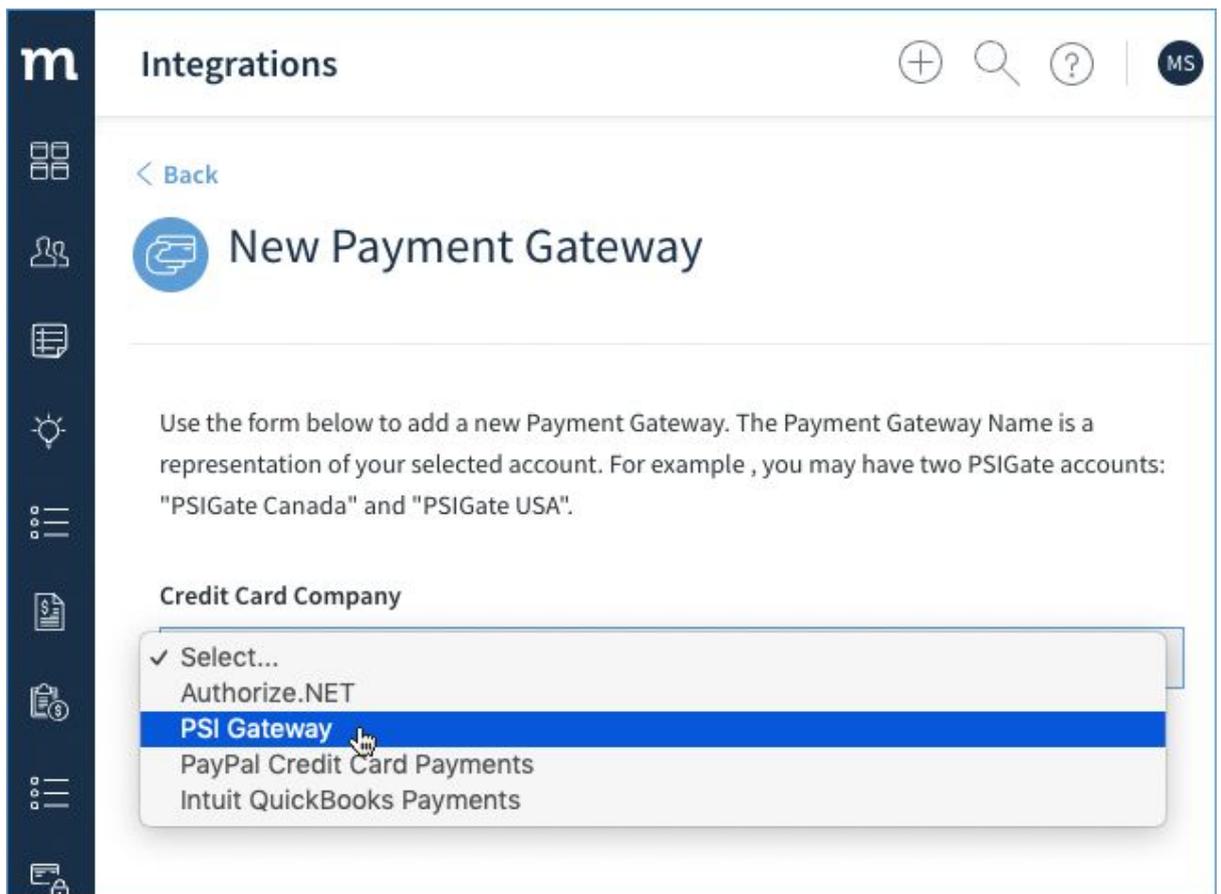
- **Accepted bank Types:** When adding Authorize.net, you can limit the types of accounts you'll accept. By default, all three are available.
- **Payment Methods - Activate Credit Card and Activate eCheck:** By default, both Credit Card and eCheck are enabled for all Authorize.Net gateways. If you would like to disable either of these for a specific gateway, that option is set here.
- **Available on Guest Pages and Available on Public Pages:** When adding Authorize.net, you can limit the types of payment you will accept on Guest Pages (Customer Portals) and Public Pages.

When you've filled in your details, click **Save**. Authorize.Net is available as a payment gateway.

Configuring PSI Gate

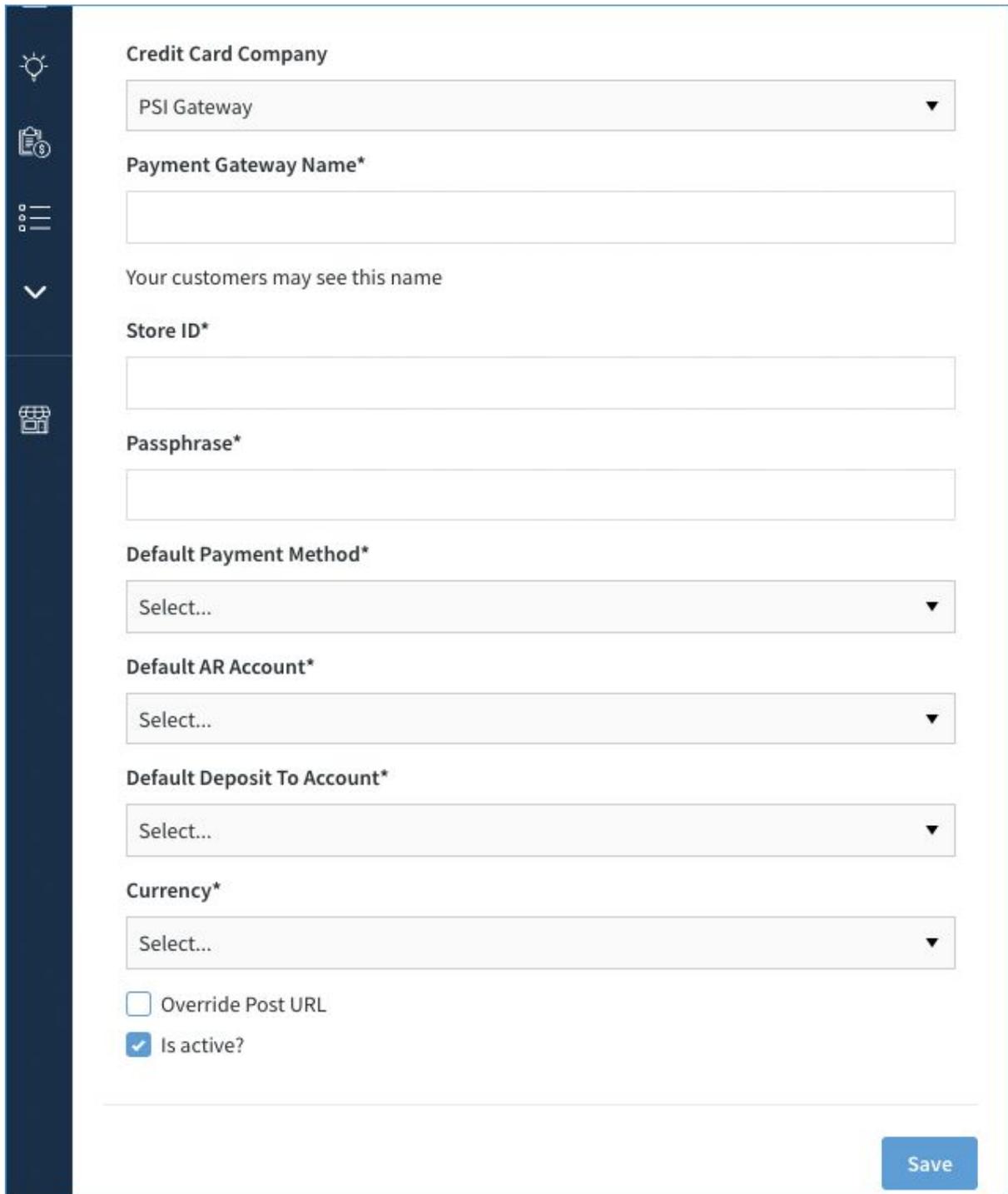
PSIGate is one of several payment gateways that can be used to accept credit card payments through Method's Payments App. Before you can use PSI to accept payments, you must [sign up for a merchant account](#) (if you don't already have one) and then follow these steps to set up the gateway in your Method account.

1. Navigate to *Payment Gateways* in Method:CRM.
2. From the *Credit Card Company* dropdown, choose **PSI Gateway**.



Setting Up PSI Gateway as a Payment Gateway

All fields marked with an asterisk (*) are required to set up the gateway.



The screenshot shows a software interface for setting up a payment gateway. On the left is a dark blue sidebar with icons for a lightbulb, a document with a dollar sign, a list, a downward arrow, and a keyboard. The main content area is white and contains the following fields:

- Credit Card Company**: A dropdown menu with "PSI Gateway" selected.
- Payment Gateway Name***: An empty text input field.
- Your customers may see this name**: A text label.
- Store ID***: An empty text input field.
- Passphrase***: An empty text input field.
- Default Payment Method***: A dropdown menu with "Select..." selected.
- Default AR Account***: A dropdown menu with "Select..." selected.
- Default Deposit To Account***: A dropdown menu with "Select..." selected.
- Currency***: A dropdown menu with "Select..." selected.
- Override Post URL**
- Is active?**

A blue "Save" button is located at the bottom right of the form.

- **Payment gateway name***: This is the name that will appear in the dropdown. If this gateway appears in a customer portal, it will be visible to your customers.
- **Store ID & passphrase***: These unique pieces of information are used to set up and authenticate a connection between your merchant account and Method. You are assigned a Store ID and passphrase when you sign up to PSIGate.
- **Default payment method***: The payment method most likely to be used. In a gateway, this is probably a credit card.
- **Default A/R account***: This dropdown is populated by QuickBooks, but does not appear for QuickBooks Online users.
- **Default Deposit To account***: The account where money is initially deposited, also populated by QuickBooks.
- **Currency**: It's a Method best practice to assign a default currency that coincides with the currency most of your customers will use to pay you.
- **Override Post URL**: gives you the option to use any credit card processor that uses the same API as PSIGate. You should not use this option unless you are given a URL by your gateway provider.
- **Is active?**: Flags this gateway as active, which means it appears in the active gateways list and in dropdowns throughout Method.

When you've filled in your details, click **Save**.

As long as you've set this gateway to Active, it will appear in your active gateways and in payment gateway dropdowns in Method.

PayPal Credit Card Payments

PayPal's **Payflow Payment Gateway** is one of several payment gateways that can be used to accept credit card payments through Method's Payments App.

Requirements For PayPal

To add PayPal Credit Card payments in Method, you will need:

- The **Pro** version of PayPal's Payflow Payment Gateway.

If you do not have Payflow Payment Gateway, then you can [sign up for an account on their site](#).

Note: Although no longer available, the older PayPal set up listed below will work for those users who still use it.

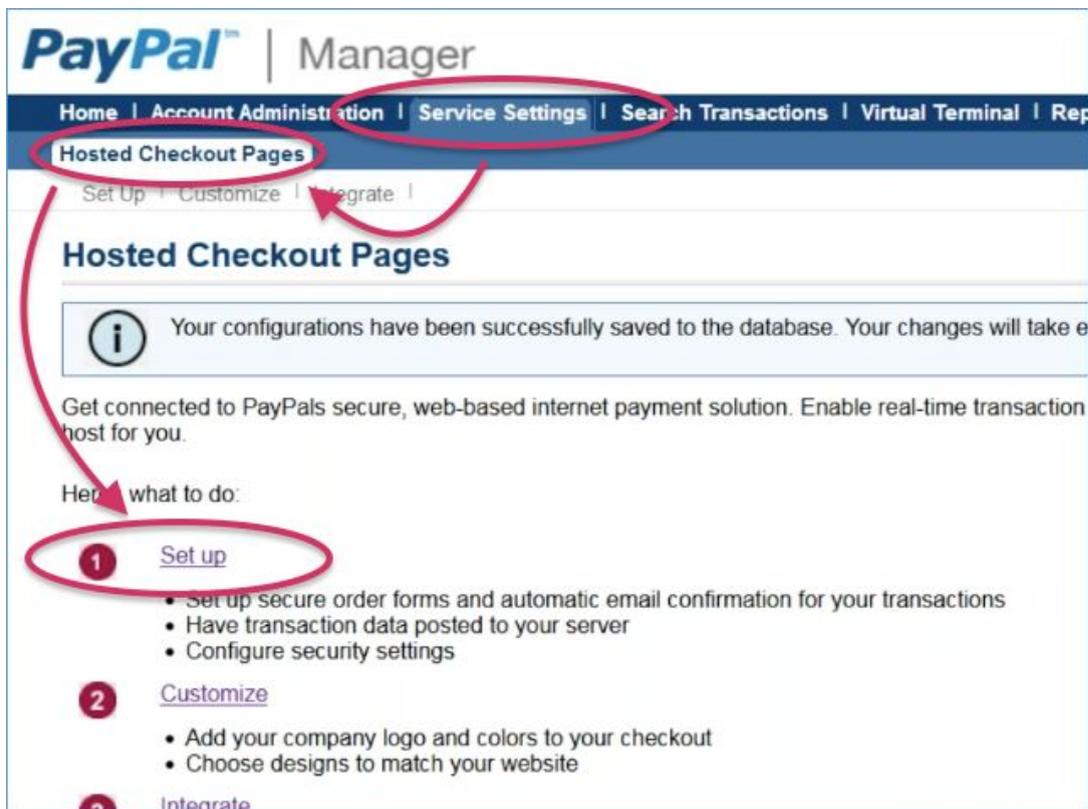
- PayPal Express Checkout
- PayPal Website Payments Pro
- PayPal Payflow Pro

Step 1: Set up PayPal

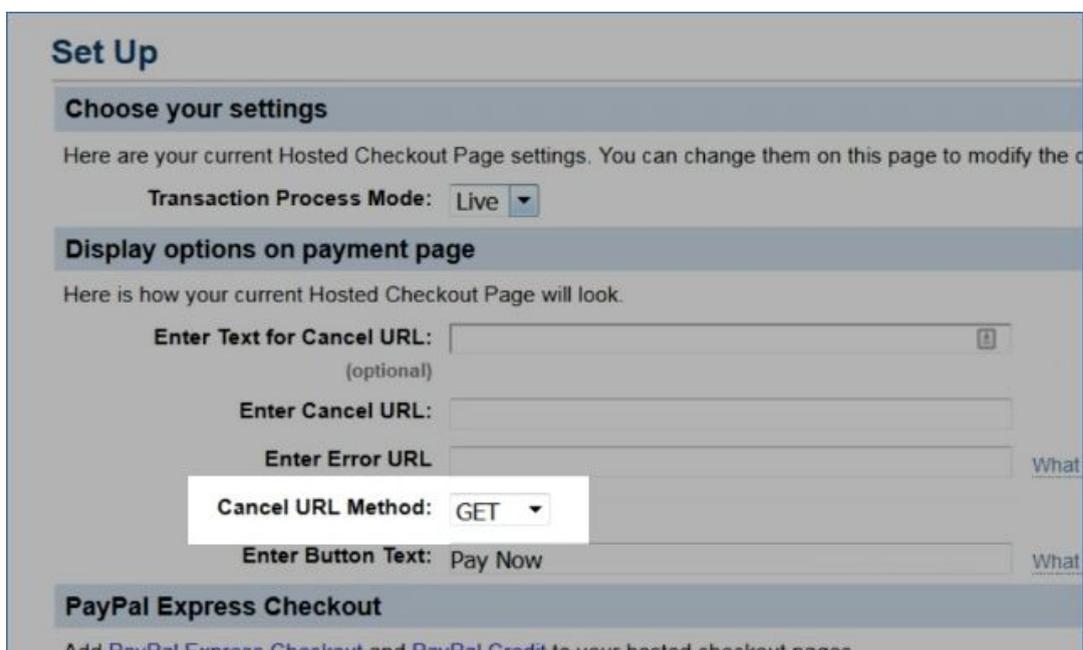
Before you can set up Method for PayPal Credit Card Payments, you must ensure PayPal's Payflow is configured properly.

1. Sign into <http://manager.paypal.com>

2. Navigate to *Service Settings > Hosted Checkout Pages > Set Up*.



3. Under *Choose your setting*, ensure **Transaction Process Mode** is set to **Live**.



4. Under *Display options on payment page*, set *Cancel URL Method* to **Get**.

Set Up

Choose your settings

Here are your current Hosted Checkout Page settings. You can change them on this page to modify the c

Transaction Process Mode: Live

Display options on payment page

Here is how your current Hosted Checkout Page will look.

Enter Text for Cancel URL: (optional)

Enter Cancel URL:

Enter Error URL: [What is this?](#)

Cancel URL Method: GET

Enter Button Text: Pay Now [What is this?](#)

PayPal Express Checkout

Add [PayPal Express Checkout](#) and [PayPal Credit](#) to your hosted checkout pages.

5. Under *Paypal Express Checkout*, **Enable Paypal Express Checkout** should be yes.

Enter Button Text: Pay Now [What is this?](#)

PayPal Express Checkout

Add [PayPal Express Checkout](#) and [PayPal Credit](#) to your hosted checkout pages.

Enable PayPal Express Checkout: Yes

Enable PayPal Credit: Yes

How Your Pages Look: Design Pages

PayPal email address: j.gamble@method.me [What is this?](#)

PayPal Sandbox email address: paypal_us_sandbox@method.me [What is this?](#)

If it's already enabled, the section will look like this:

PayPal Express Checkout

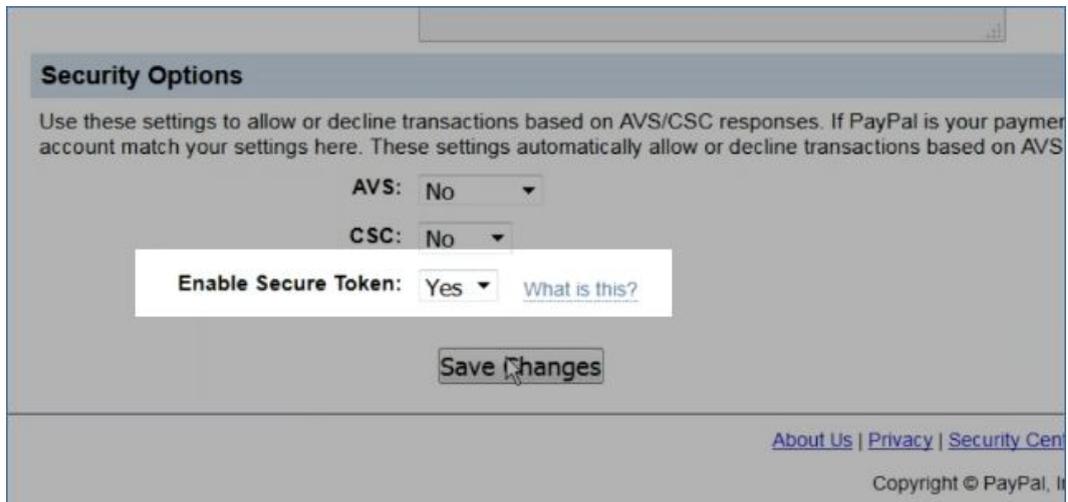
Add [PayPal Express Checkout](#) to your current hosted checkout page.

How Your Pages Look: Design Pages

PayPal email address: scarcat@gmail.com [What is th](#)

PayPal Sandbox email address: [What is th](#)

6. Under *Security Options*, ensure *Enable Secure Token* is set to **Yes**.



Security Options

Use these settings to allow or decline transactions based on AVS/CSC responses. If PayPal is your payment account match your settings here. These settings automatically allow or decline transactions based on AVS

AVS: No

CSC: No

Enable Secure Token: Yes [What is this?](#)

Save Changes

[About Us](#) | [Privacy](#) | [Security Center](#)

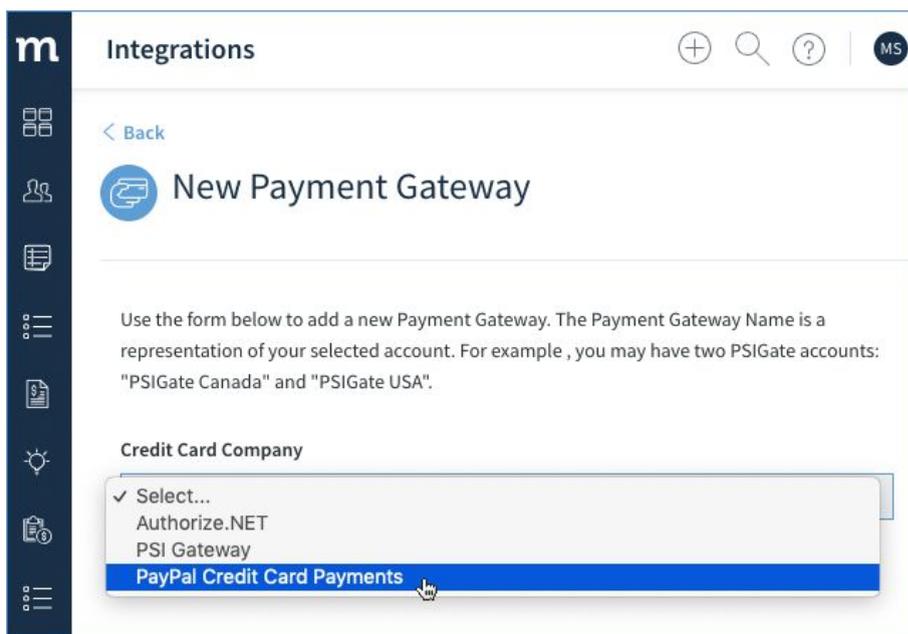
Copyright © PayPal, Inc.

7. If you made any changes, **Save Changes** to commit them.

Step 2: Add PayPal Credit Card Payments in Method

Now that PayPal is configured, you can add it to your Method account as a payment gateway.

1. Navigate to **Payment Gateways** in Method:CRM.
2. From the *Credit Card Company* dropdown, choose **PayPal Credit Card Payments**.



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[< Back](#)

New Payment Gateway

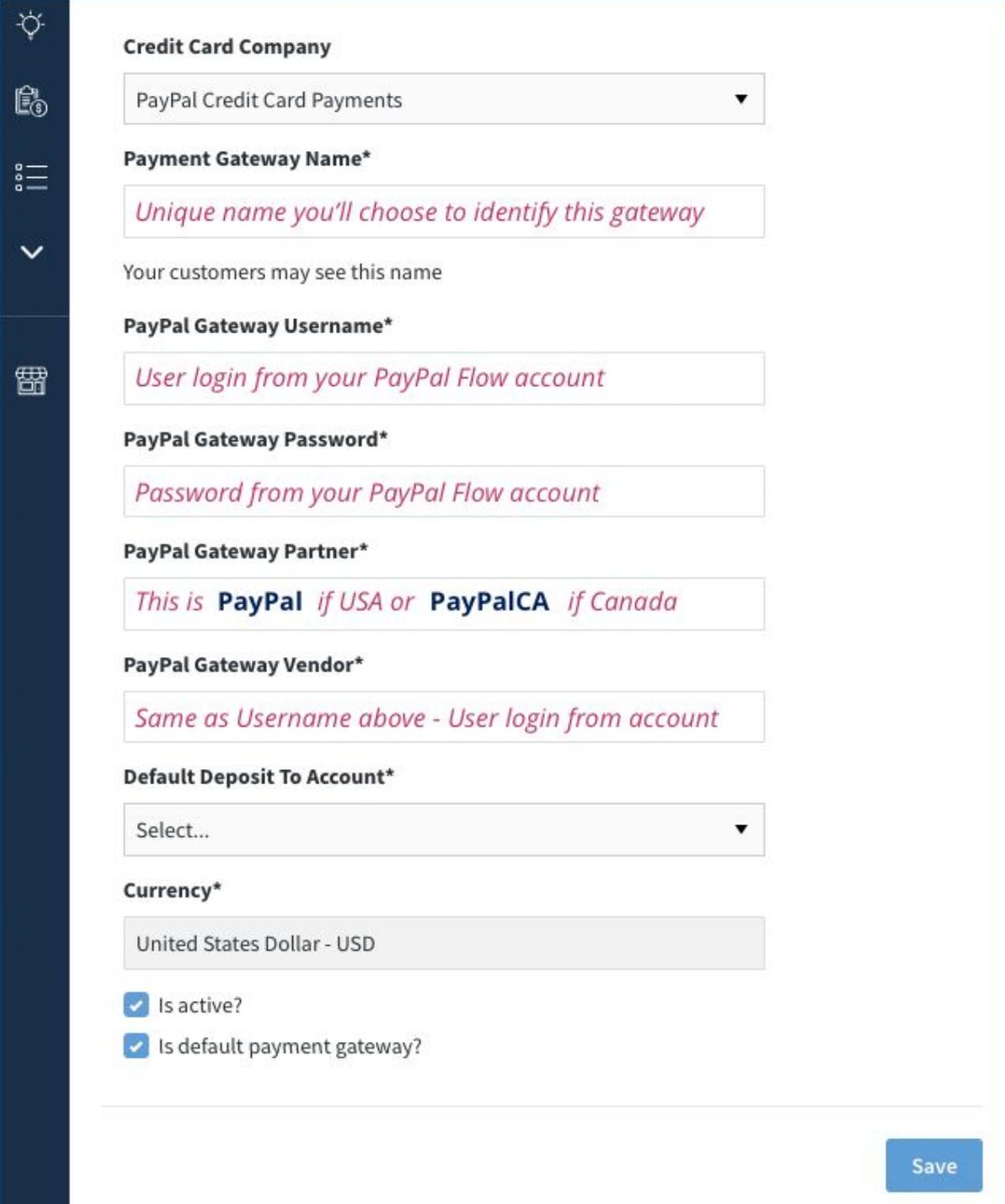
Use the form below to add a new Payment Gateway. The Payment Gateway Name is a representation of your selected account. For example, you may have two PSIGate accounts: "PSIGate Canada" and "PSIGate USA".

Credit Card Company

- ✓ Select...
- Authorize.NET
- PSI Gateway
- PayPal Credit Card Payments**

Step 3: Configure PayPal Payment Gateway in Method

All fields marked with an asterisk (*) are required to set up the gateway and will be explained further in the sections below.



The screenshot shows a configuration form for a PayPal Payment Gateway. On the left is a dark blue sidebar with icons for a lightbulb, a clipboard with a plus sign, a list, a downward arrow, and a storefront. The form contains the following fields and options:

- Credit Card Company:** A dropdown menu with "PayPal Credit Card Payments" selected.
- Payment Gateway Name*:** A text input field with the placeholder text "Unique name you'll choose to identify this gateway". Below it, a note says "Your customers may see this name".
- PayPal Gateway Username*:** A text input field with the placeholder text "User login from your PayPal Flow account".
- PayPal Gateway Password*:** A text input field with the placeholder text "Password from your PayPal Flow account".
- PayPal Gateway Partner*:** A text input field with the placeholder text "This is **PayPal** if USA or **PayPalCA** if Canada".
- PayPal Gateway Vendor*:** A text input field with the placeholder text "Same as Username above - User login from account".
- Default Deposit To Account*:** A dropdown menu with "Select..." selected.
- Currency*:** A dropdown menu with "United States Dollar - USD" selected.
- Two checkboxes: "Is active?" and "Is default payment gateway?", both of which are checked.
- A blue "Save" button is located at the bottom right of the form.

What is my PayPal Gateway Username?

The *PayPal Gateway Username* is your **user login** for your *PayPal Gateway* as set when you signed up for a **PayPal Flow** account.

If you don't know what your user login is:

1. Sign into <http://manager.paypal.com>
2. Go to *Account Administration > Manage Users*.
3. Your **User Login** is your *Paypal Gateway Username*.

What is my PayPal Gateway Password?

Your *PayPal Gateway Password* is the password set up when the account was created. If you can't recall your password, you will need to reset it within PayPal.

What is my PayPal Gateway Partner?

Your *PayPal Gateway Partner* is either:

- **PayPal** (If you are in USA)
- **PayPalCA** (if you are in Canada)

What is my PayPal Gateway Vendor?

Your *PayPal Gateway Vendor* is the same as your **PayPal Gateway Username**. This is your user login for your PayPal Gateway as set when you signed up for a *PayPal Flow* account.

What are the other options to fill out?

The rest of the options to fill out should be self explanatory.

- **Default Deposit To account:** The account where money is initially deposited, which is populated by QuickBooks. The defaults you set up here will be overridden by the fields on the *New/Edit Payment* screen if they don't match, so ensure you fill out those fields with the same information.
- **Currency:** You can assign a currency and choose whether to make it the default for this gateway. It's a Method best practice to assign a default currency that coincides with the currency most of your customers will use to pay you.

And finally, the following checkboxes represent non-required options.

- **Active:** gateway is active and appears in the active gateways list and in dropdowns throughout Method.
- **Is default payment gateway?:** Is this gateway the default payment gateway used for all payments?

When you've filled in your details, click **Save**.

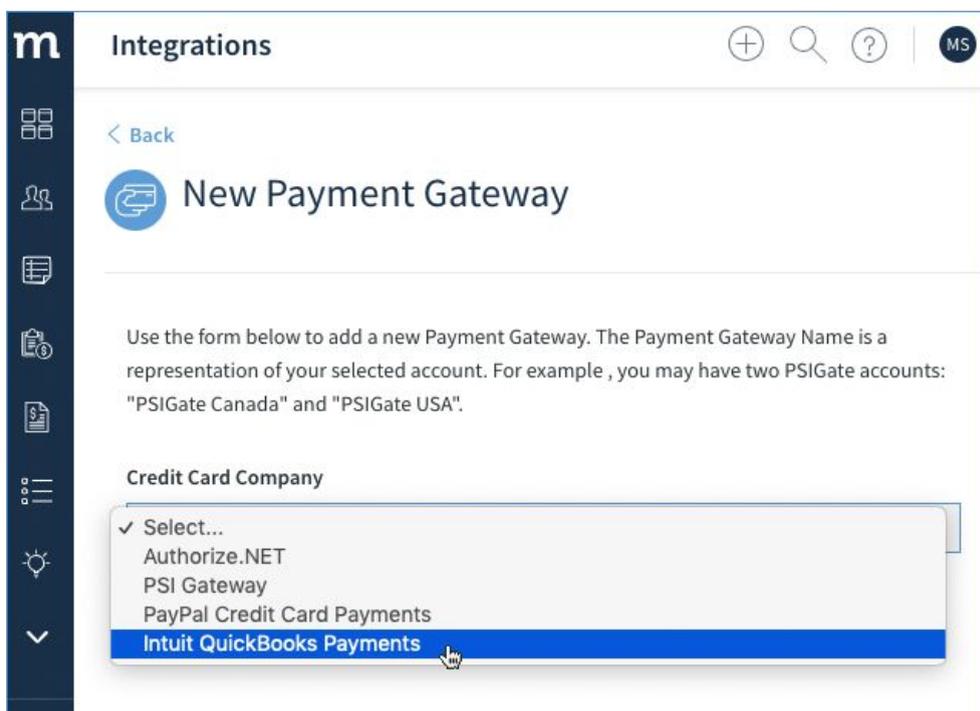
Intuit QuickBooks Payments

Intuit QuickBooks Payments is one of several payment gateways that can be used to accept credit card payments through Method's Payments App.

Before you can use QuickBooks Payments to accept payments, you must [sign up for QuickBooks Payments](#) (if you don't already have one).



1. Navigate to **Payment Gateways** in Method:CRM.
2. From the *Credit Card Company* dropdown, choose Intuit QuickBooks Payments.



Setting Up Intuit QuickBooks Payments as a Payment Gateway

When you select *Intuit QuickBooks Payments* in the dropdown, you will get the following screen. All fields marked with an asterisk (*) are required to set up the gateway.

New Payment Gateway

Use the form below to add a new Payment Gateway. The Payment Gateway Name is a representation of your selected account. For example , you may have two PSIGate accounts: "PSIGate Canada" and "PSIGate USA".

Credit Card Company

Intuit QuickBooks Payments ▼

Disconnected from Intuit.com 

Authorize Method to connect to your QuickBooks Payments account

Payment Gateway Name*

Your customers may see this name

Default Payment Method*

Select.. ▼

Default Deposit To Account*

Select.. ▼

Currency*

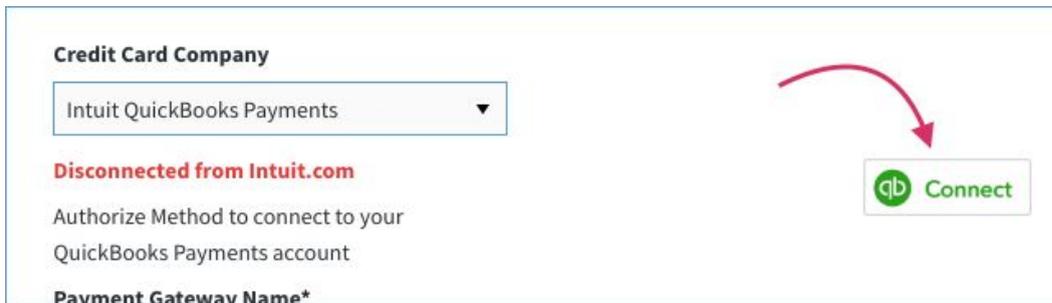
United States Dollar - USD

Is active?

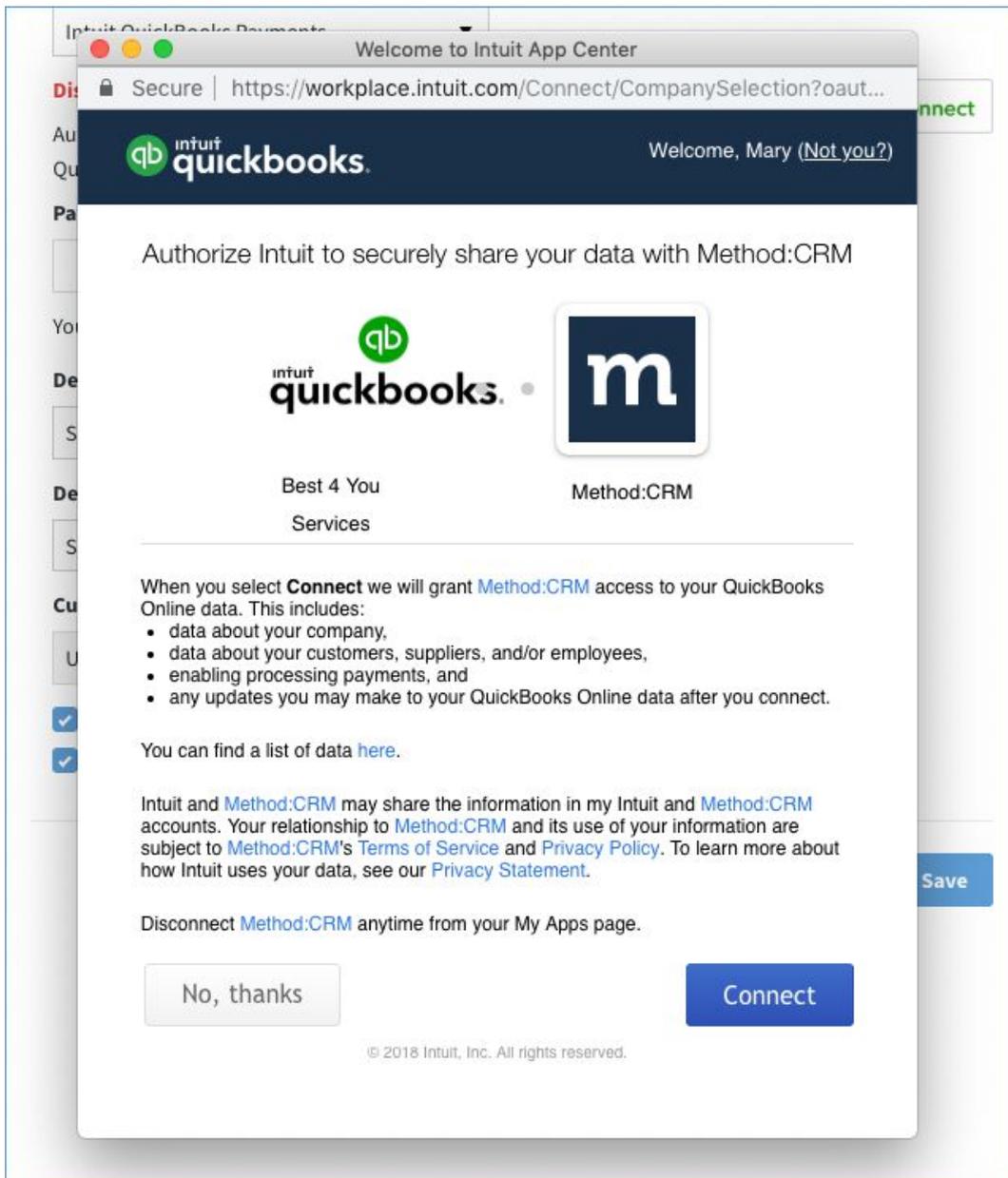
Is default payment gateway?

Save

1. First, you will need to connect to *Intuit*. Click the **Connect** button.



2. You will need to authorize Intuit to securely share data with Method:CRM, so complete the authorization.



Once completed, you will see you are connected to Intuit.com.



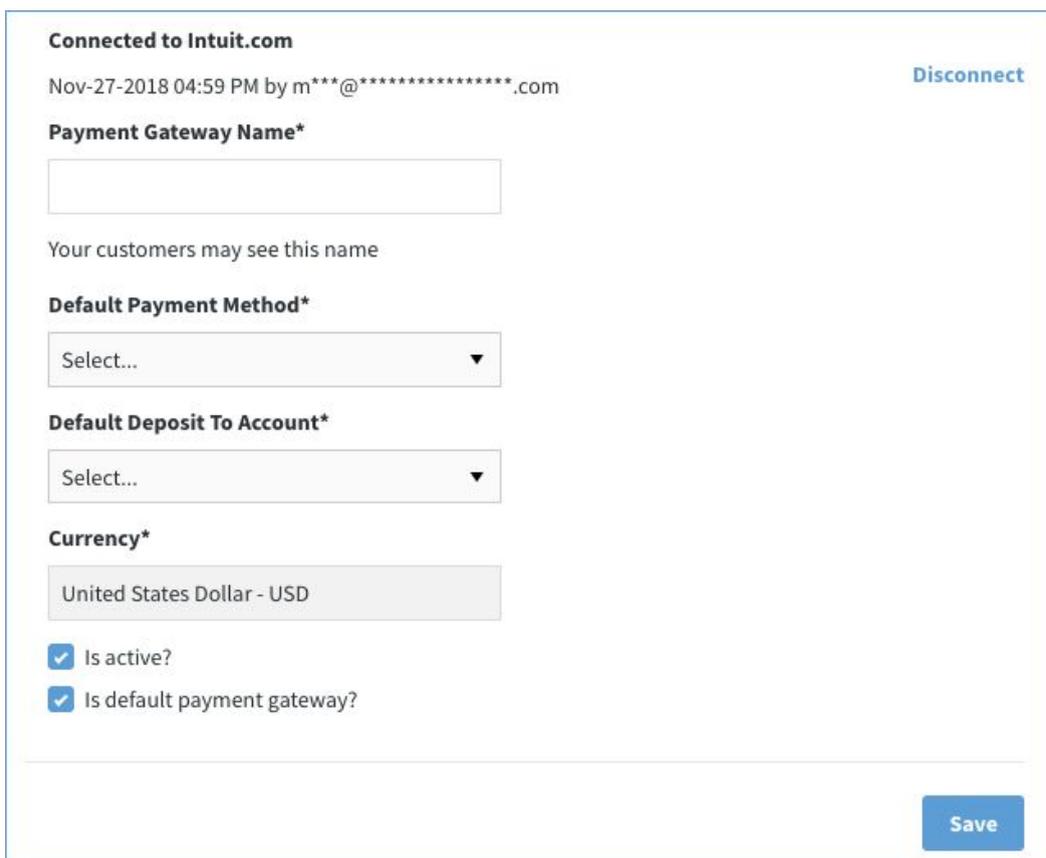
Credit Card Company
Intuit QuickBooks Payments ▼

Connected to Intuit.com
Nov-27-2018 04:59 PM by m***@*****.com [Disconnect](#)

Payment Gateway Name*

3. Finally comes the fields you need to fill in.

NOTE: The defaults you set up here will be overridden by the fields on the New/Edit Payment screen if they don't match, so ensure you fill out those fields with the same information.



Connected to Intuit.com [Disconnect](#)
Nov-27-2018 04:59 PM by m***@*****.com

Payment Gateway Name*

Your customers may see this name

Default Payment Method*
Select... ▼

Default Deposit To Account*
Select... ▼

Currency*
United States Dollar - USD

Is active?
 Is default payment gateway?

[Save](#)

- **Payment gateway name***: This is the name that will appear in the dropdown. If this gateway appears in a customer portal, it will be visible to your customers.
- **Default payment method***: The payment method most likely to be used. In a gateway, this is probably a credit card.

- **Default Deposit To account***: The account where money is initially deposited, also populated by QuickBooks.
- **Currency**: Assign a currency and choose whether to make it the default for this gateway.
- **Is active?**: Flag this gateway as active, which means it appears in the active gateways list and in payment gateway dropdowns.
- **Is default payment gateway?**: The default payment gateway used for all payments.

When you've filled in your details, click **Save** and *Intuit QuickBooks Payments* is available as a payment gateway.