



Payment Link

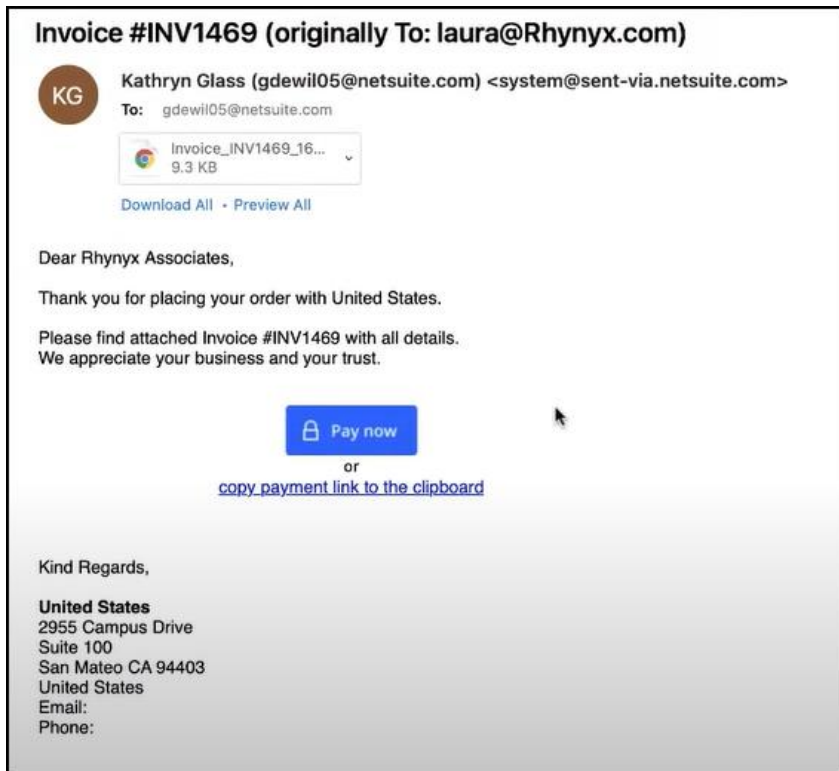
By Cory Anderson

Principal, Stratos ERP Partners



What is Payment Link?

- The Payment Link feature allows your customers to conveniently pay an invoice online, using a computer or mobile device. Instead of having to contact you and discuss payment, your customers can receive an email of the invoice with a link to the payment page. They can choose which method they want to use to pay, including ACH, credit cards, and PayPal, from a list you have selected.



Features

- ❖ Add a link to Invoices that are sent to your customers
- ❖ Allow partial payments
- ❖ Include company logo and info on payments page
- ❖ Customize email templates used to inform customers of accepted or rejected payments
- ❖ Use a link or QR code in an email
- ❖ On the Payment Link Checkout page, a customer can review the invoice, choose a payment method, and submit payment



Prerequisites

- ❖ Enable Payment Instruments
 - ❖ Setup > Company > Enable Features > Transactions > Payment Processing
- ❖ Allow online credit card payments
- ❖ Set up one or more payment methods
- ❖ Set up and assign payment processing profiles for each credit card gateway you want to use
- ❖ Set up DomainKeys Identified Mail (DKIM) to authenticate emails from your account



Credit Card Processors

- ❖ Check out this article for an in-depth discussion on credit card processors that integrate with NetSuite:

- ❖ <https://timblairwhite.com/netsuite-credit-card-processing/>

- ❖ Processors will have setup fees and recurring monthly gateway fees in addition to per transaction fees



ACH and PayPal

- ❖ ACH - you must use 'Versapay's Solupay for NetSuite SuitePayments'
 - ❖ Information available in SuiteApps
- ❖ PayPal – must use PayFlow Pro



Setup Steps



- 4 Steps to use Payment Link:
 1. Enable Payment Link in Company Preferences
 2. Configure Payment Link
 3. Customize Payment Link Email Templates
 4. Set Up Payment Link Invoice Templates

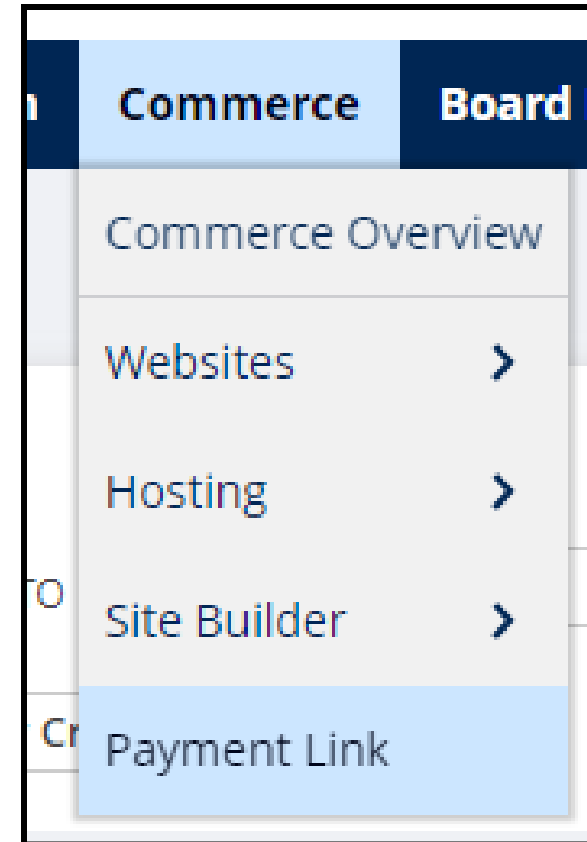


Setup

Enable payment link feature

- Setup > Company > Enable Features > Transactions

Once enabled, there will be a Payment Link configuration option under Commerce



Setup

Configure payment link

- Go to Commerce > Payn

Payment Link Setup

[Save](#) [Cancel](#) [Preview](#)

Payment Link Checkout URL

DOMAIN PREFIX *

rmnsug .suitepayments.com/paymentlink/

Payment Link Checkout Page

PAYMENT METHODS *

- American Express
- Discover
- Master Card
- VISA

ACCEPT PARTIAL PAYMENTS

COMPANY LOGO

Start typing for searching

If you didn't find preferable Payment Method, check the Payment Method Settings

Email Templates

PAYMENT ACCEPTED *

Standard Payment Link Payment Confirmation

PAYMENT REJECTED *

Standard Payment Link Payment Declined Notifica...

[Save](#) [Cancel](#) [Preview](#)

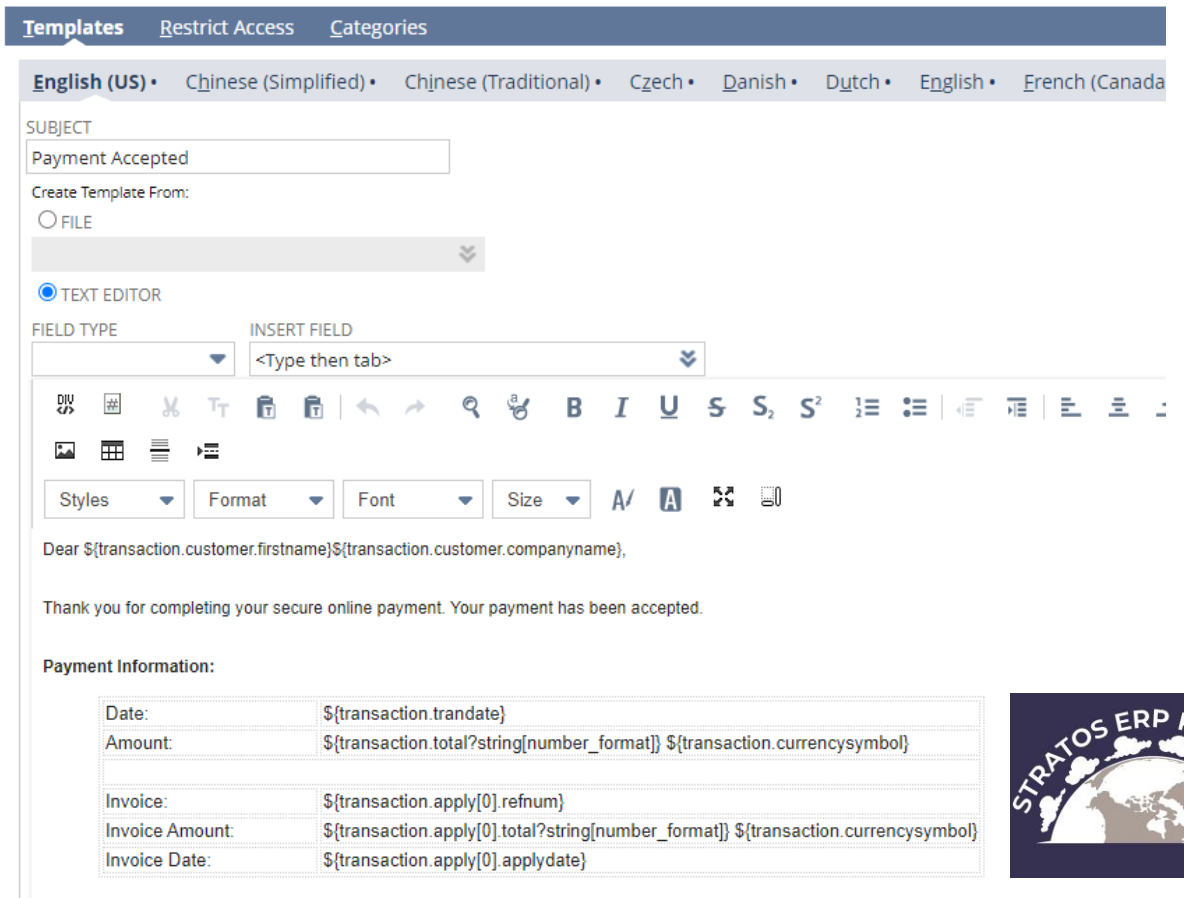


Setup

Customize Payment Link Email Templates

- Setup > Company > System Email Templates

1. Payment Confirmation
2. Payment Declined Notification



The screenshot displays the 'Templates' management interface. At the top, there are tabs for 'Templates', 'Restrict Access', and 'Categories'. Below this, a language selection bar includes 'English (US)', 'Chinese (Simplified)', 'Chinese (Traditional)', 'Czech', 'Danish', 'Dutch', 'English', and 'French (Canada)'. The main editing area is titled 'SUBJECT' and contains a text box with 'Payment Accepted'. Below the subject, there are options to 'Create Template From:' with radio buttons for 'FILE' and 'TEXT EDITOR' (which is selected). A rich text editor toolbar is visible, featuring icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and text color. The editor content shows a personalized greeting: 'Dear \${transaction.customer.firstname}\${transaction.customer.companyname},'. This is followed by a thank-you message: 'Thank you for completing your secure online payment. Your payment has been accepted.' Below this is a section for 'Payment Information:' which contains a table with the following rows:

Date:	\${transaction.trandate}
Amount:	\${transaction.total?string[number_format]} \${transaction.currencysymbol}
Invoice:	\${transaction.apply[0].refnum}
Invoice Amount:	\${transaction.apply[0].total?string[number_format]} \${transaction.currencysymbol}
Invoice Date:	\${transaction.apply[0].applydate}

In the bottom right corner, there is a logo for 'STRATOS ERP PARTNERS' featuring a globe.

Setup

Setup invoice templates

- ❖ Decide whether to send the invoice as HTML in the body of the email message, or attached to the email as a PDF.
 - ❖ To set this preference, in NetSuite go to Home > Set Preferences > Transactions > Printing, and choose HTML or PDF for the Transaction Email Attachment Format field.
- ❖ Enable Advanced PDF/HTML Templates.
 - ❖ To enable this feature, in NetSuite go to Setup > Company > Enable Features > SuiteCloud > SuiteBuilder, and check the box for the Advanced PDF/HTML Templates field.

- **Configure invoice form**
Customization > Forms > Transaction Forms

1. Select 'Printing Type = Advanced'
2. Select the Payment Link templates for Print and Email templates



Invoice Email with Payment Link

Invoice #INV1469 (originally To: laura@Rhynyx.com)



Kathryn Glass (gdewil05@netsuite.com) <system@sent-via.netsuite.com>

To: gdewil05@netsuite.com



[Download All](#) · [Preview All](#)

Dear Rhynyx Associates,

Thank you for placing your order with United States.

Please find attached Invoice #INV1469 with all details.
We appreciate your business and your trust.



or

[copy payment link to the clipboard](#)

Kind Regards,

United States
2955 Campus Drive
Suite 100
San Mateo CA 94403
United States
Email:
Phone:



Invoice with Payment Link QR Code

**ORACLE
NETSUITE**

United States
2955 Campus Drive
Suite 100
San Mateo CA 94403
United States

Invoice #INV1469

Date: 11/23/2021
Due Date: 12/23/2021
Terms: Net 30

Total
USD 132.78



Pay with the QR code, or click this [secure link](#).
You can also copy the link to clipboard.

Bill To:
Rhynx Associates
80 Acres
Pasadena CA 90042
United States

Ship To:
80 Acres
Pasadena CA 90042
United States

Item	Description	Quantity	Rate	Amount
Industrial Belt-16 ft Len-3/8 Inch Thick-2 inch Width Industrial Belt	Industrial Belt	1	120.00	120.00
Subtotal				120.00
Shipping Cost				12.78
Tax Total				0.00
Total				USD 132.78



Invoice Payment Screen

Payment Link Demo





Payment

Payment Amount

\$132.78

[Pay other amount](#)

Select payment method

-  Discover Payment Card
-  Master Card Payment Card
-  VISA Payment Card
-  American Express Payment Card

Summary

Invoice #INV1469
Invoice Date: 11/23/21
Due Date: 12/23/21

Amount Due
\$132.78

Bill To
80 Acres
Pasadena, CA 90042
US

Status
Open
Terms
Net 30
(active)

Item	Quantity	Amount
Industrial Belt	1	120.00
Subtotal		120.00
Shipping and handling		12.78
Tax		0.00
Total		\$132.78



Partial Payment Option Enabled

Invoice Date: 11/23/21

Original Amount	132.78
Amount Due	132.78
Payment Amount	USD <input type="text" value="132.78"/>



Payment Complete

Payment Link Demo

Payment



Thank you!

Your payment has been successful

You will receive an email with your payment confirmation.

Summary

Invoice #INV1469

Invoice Date: 11/23/21

Due Date: 12/23/21

Amount Due

\$0.00

Bill To

80 Acres

Pasadena, CA 90042

US

Status

Paid In Full

Terms

Net 30

(active)

> Payment History

Item	Quantity	Amount
Industrial Belt	1	120.00
Subtotal		120.00
Shipping and handling		12.78
Tax		0.00
Total		\$132.78



Mobile View of Payment Screen

