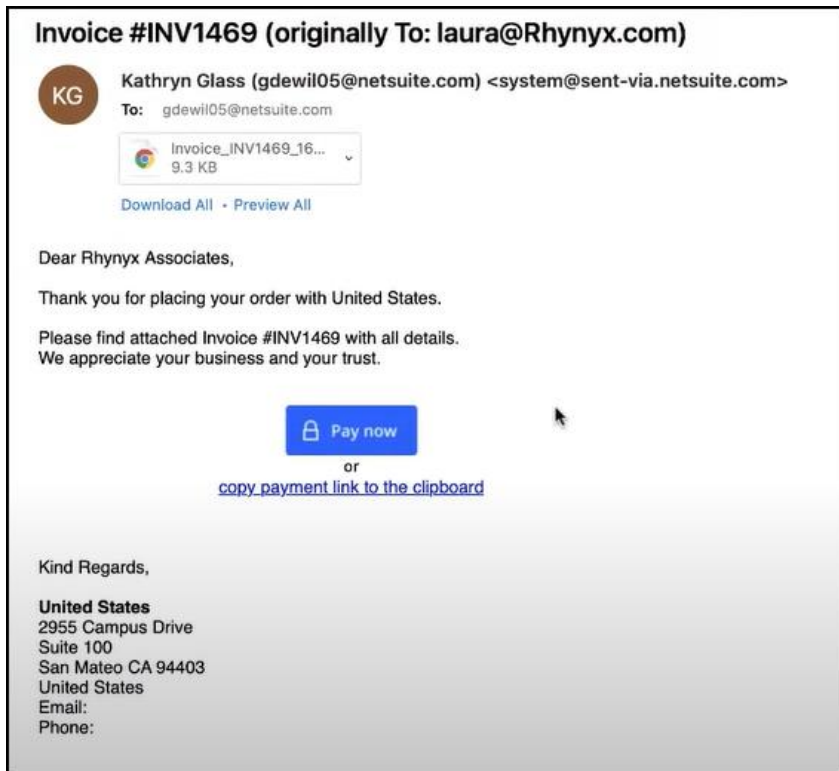# Payment Link

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
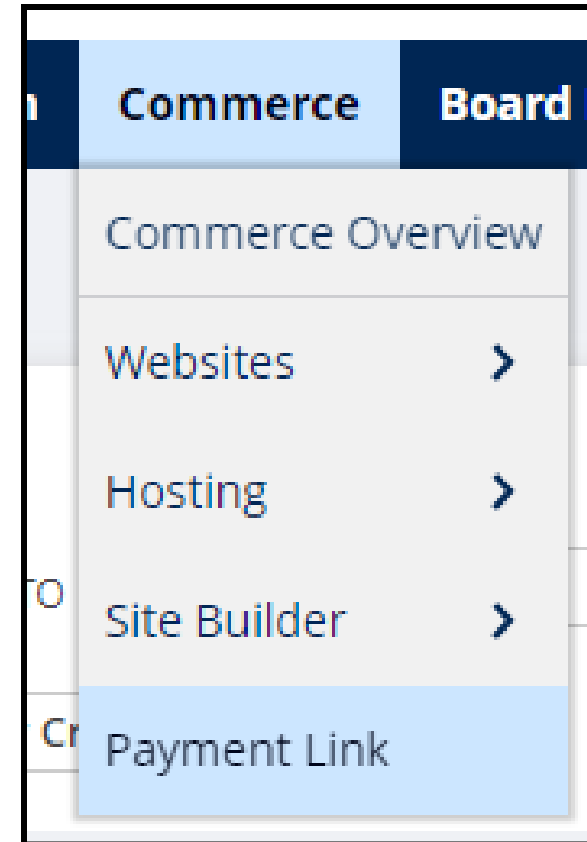
Setup

Configure payment link
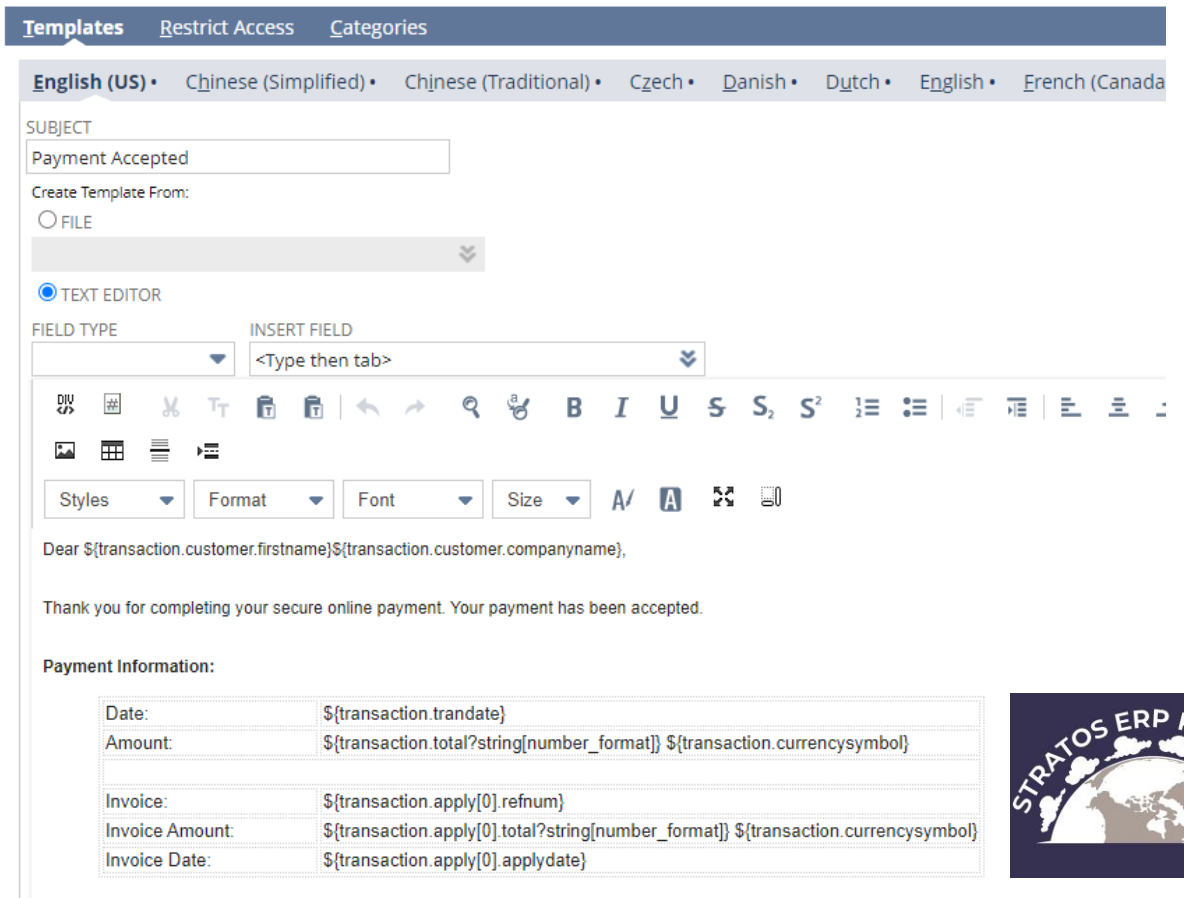
- Go to Commerce > Paym

Setup

Customize Payment Link Email Templates

- Setup > Company > System Email Templates

1. Payment Confirmation

2. Payment Declined Notification

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)

KG

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

To: gdewil05@netsuite.com

Invoice_INV1469_16...
9.3 KB

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.

🔒 Pay now

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

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

STRATOS ERP PARTNERS

Partial Payment Option Enabled

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