

Getting Started: Activating Paylink

Standard ERP and Standard Products allow your customers to pay their bills directly from their invoice Email.

Here's how to get started

To use this service, you need to register for a Payment Gateway that applies to your region.

PayLink supports the following Payment Gateways:

1. PayPal – Worldwide
2. Paysera – European Union
3. HonorsGate (Authorize.net) – USA and Canada
4. Paymark – New Zealand
5. MercadoPago - Argentina, Chile, Colombia, Uruguay, Mexico

Setup:

1. Launch the application.
2. From the Navigation Centre, select the Enter Company information icon. Fill in all information that applies to your company, then Save the record.

1: Company Info

If you already have an existing cloud company, please connect to it here:

Connect to Company

If you already have an existing local company, you can connect to your account here:

Connect to existing Account

If you would like to start with your own company, please fill out your company details:

Company _____

Address Line 1 _____

Address Line 2 _____

City/Suburb _____

County _____

Post Code _____

Telephone _____ Fax _____

Email _____

Website _____

Other information:

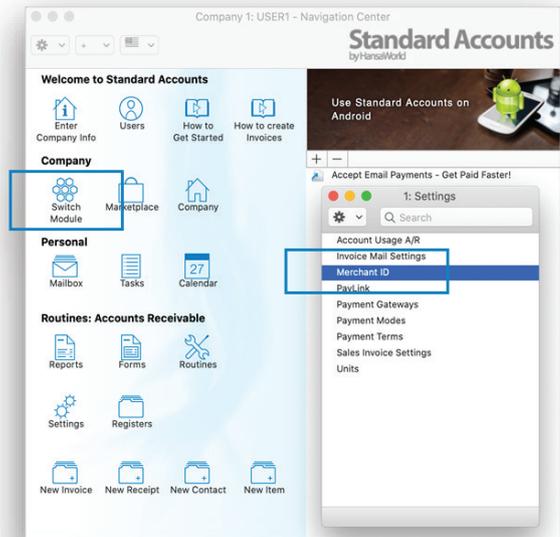
Reg. No. _____ VAT Reg. No. _____

Commercial Reg. No. _____ Bank Customer ID _____

Bank Name _____ Bank A/C _____

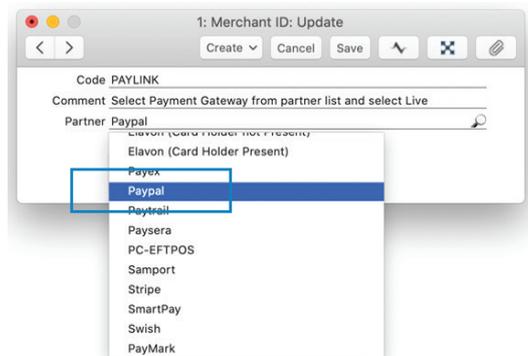
Start Company

3. Using the Switch Module icon on the Navigation Centre, switch module to Sales Ledger/Accounts Receivable. Open the Setting called Merchant ID.



Code	Comment
PAYLINK	Select Payment Gateway from partner list and select Live

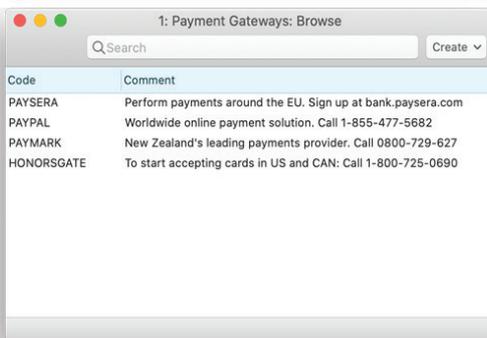
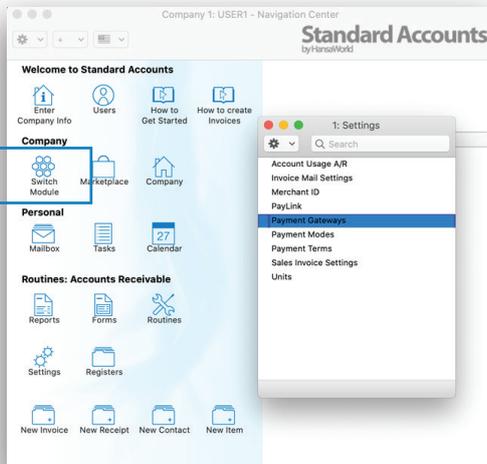
4. Open the Merchant ID record. In the partner field, open the paste special window and select your payment gateway. For HonorsGate, select Authorize.net (Cardholder not present)



5. Select the 'Live' option in the Merchant ID setting and save the record.

Getting Started: Activating Paylink

6. Now, in the Sales Ledger/Accounts Receivable module, open the Setting called Payment Gateways.



7. Once you have obtained account credentials for your Payment Gateway, open the Payment Gateway record in Sales Ledger Settings and enter the information in the required fields.

Code HONORSGATE
Comment To start accepting cards: Call 800-725-0690

Misc SOP Swish PayPal

Account No./Phone No. Enter Acct No. here Type
Local Machine _____ Type
Currency USD _____ POS
 Web
Refund Password _____
Merchant ID PAYLINK _____
Key Enter Key here then Save record _____
URL _____
Serial No. _____
Terminal ID _____
Seconds _____ for disallowing duplicate transactions

Options
 Send Invoice Address
 Send Delivery Address
 Send Invoice Information
 Send Data for Corporate Cards

Required fields are broken down by each Payment Gateway below:

Paypal:

- Select or setup your default currency
- Make sure 'Web' is selected
- Select the PayPal tab and enter Username, Password, and Signature provided by Paypal. Save this record.

Paysera and Paymark:

- Select or setup your default currency
- Make sure 'Web' is selected
- Select Merchant ID you've created from Merchant ID selection
- Select the SOP tab and enter Profile and Access Key provided by Paysera/Paymark.
- Key Created Date should be the current date, and the key expiration should be the date the key given to you by Paysera/Paymark expires. After you've entered this information, save the record.

HonorsGate (Authorize.net):

- Select USD or CAD currency
- Make sure 'Web' is selected
- Enter Account Number and Key provided by Honors Solutions.
- Select Merchant ID you've created in Merchant ID selection, then save record.

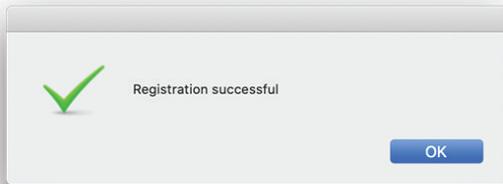
MercadoPago:

- Select or set up your default currency
- Make sure 'Web' is selected
- Select the Merchant ID you've created from the Merchant ID selection
- Select the MercadoPago tab and enter your Public Key and Access Token, these ones are given by MercadoPago.

Getting Started: Activating Paylink

- Open the Setting called PayLink in the Sales Ledger/Accounts Receivable module and then select the Register Icon.

You will then receive a message saying "Registration successful."



Select the field and then on keyboard select Cmd + Shift + V (Ctrl + Shift + V for Windows) to open the text.

You can edit the text there and then save the record to update it.

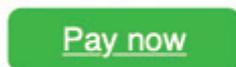
*Standard ERP, Standard POS, Standard Hotel and Standard Eats all use the same setup. In Standard ERP, Standard Texts can be found in the Email and Conferences Module. Please contact your HansaWorld partner for any help needed with setting up the service.

**Editing Standard Text in an Email requires the purchase of the CRM InApp.

The Paylink Status will be changed to Registered. You will also obtain a PayLink ID, displayed on screen.



Setup is completed. Now, anytime you create an Email from an Invoice, the receiving customer (Email on Contact record) will be able to pay for it directly from their Email by selecting the green "Pay Now" button.



To edit the text that displays in the Invoice Email**, open the Invoice Mail Settings in the Sales Ledger/Accounts Receivable module.

