

Paysera PayLink Integration

Getting Started: Activating Paylink

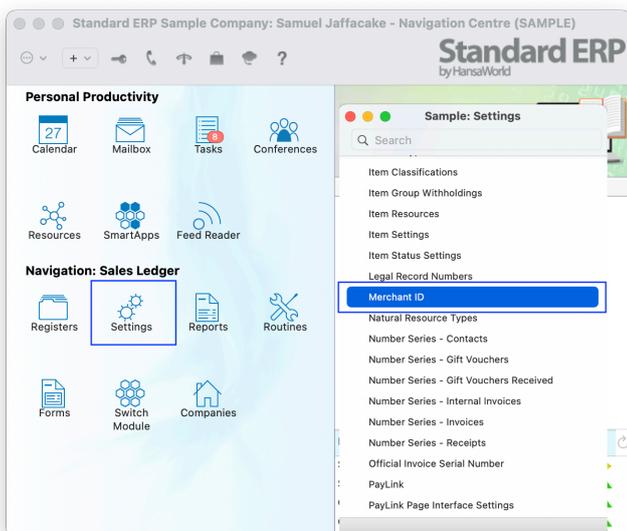
Standard ERP and all Standard Products allow your customers to pay their bills directly from their invoice Email.

How to get started

To use this service, you need to register for a Paysera Payment Gateway.

Setup Paylink

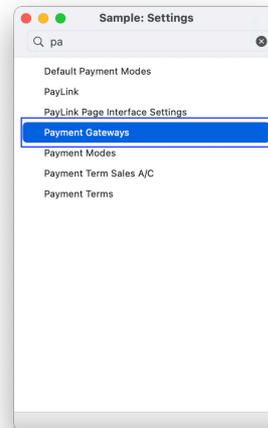
1. Launch the application.
2. Using the Switch Module icon on the Navigation Centre, switch module to Sales Ledger/Accounts Receivable. Open the Setting called 'Merchant ID'.



3. Create a new Merchant ID record. In the Partner field, open the paste special window and select 'Paysera'.
4. Select the 'Live' option in the Merchant ID Type setting and Save the record.

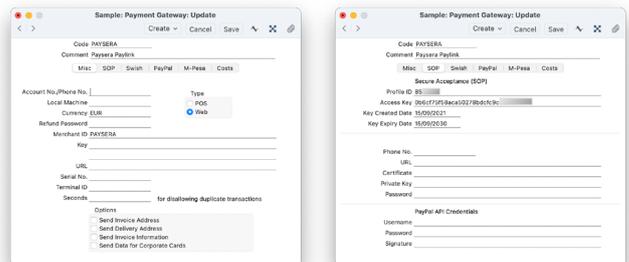


5. In the Sales Ledger/Accounts Receivable module, open the Setting 'Payment Gateways'.



6. Create a new Payment Gateway and enter the information in the required fields:

- Enter your default currency in the 'Currency' field
 - Make sure 'Web' Type is selected
 - Select 'Merchant ID' you have created from Merchant ID selection
 - Select the 'SOP' tab and enter 'Profile/Project ID' and 'Access Key' provided by Paysera
 - Key Created Date should be the current date, and the key expiration should be later than today (for example 2030-01-01)
- After you have entered this information, save the record.



7. Open the Setting 'PayLink' in the Sales Ledger/Accounts Receivable module, choose 'Payment Gateway' you created for Paysera and save.



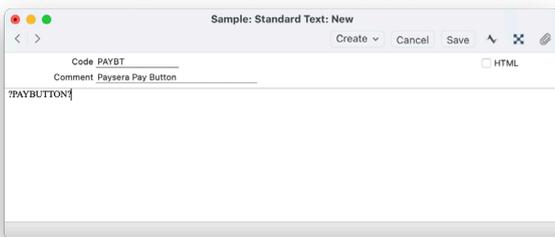
Paysera PayLink Integration

- Open the 'PayLink' record again and select the button 'Register'.
You will then receive a message saying 'Registration successful'.
The PayLink Status will be changed to 'Registered'. You will also obtain a 'PayLink ID', displayed on the screen.

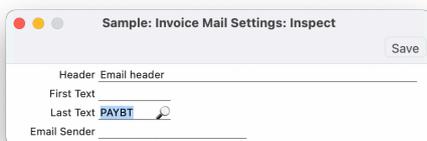


Setup email content with PayLink button

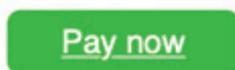
- Open the Register 'Standard Texts' in the CRM module.
- Create new 'Standard Text'.
The body should contain string ?PAYBUTTON?. If this is not defined - the email body will not contain the PayLink option.



- Open the Setting 'Invoice Mail Settings' in the Sales Ledger/Accounts Receivable module.
In the 'Last Text' enter the 'Standard Text', that contains ?PAYBUTTON?



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.



* Email body will contain PayLink button only, if:

- Invoice is OK'ed and not Invalidated,
- Payment Term Type is 'Normal' and is not marked as Closed,
- Enable PayLink check box is ticked on Contact card on 'Terms' tab,
- Enable PayLink check box is ticked on Invoice card on 'Del. Terms' tab.

** 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.