PAY-BY-LINK

A TILL PAYMENTS APPLICATION

User Guide

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Merchant User Guide

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1 Document Introduction

1.1 Purpose of the document

The purpose of this document is to provide details of various modules of the Pay-By-Link application, along with a step-by-step guide for various user types. All user types have varied access to the tool hence the exposure to tool features.

This document will act as a guide to on-board new users as well as a reference document if the user faces any challenges during the process flow.

1.2 Document Audience

This document is intended for Merchants (subsidiaries and departments), and other stakeholders who would be using this application.

2 Application Overview

Pay-By-Link is a Till payments application that provides a secure, PCI compliant, platform for merchants to manage payments. It is faster and safer way to receive money or set up a merchant account. The application will also help to reduce the paperwork at the merchant's end and efficiently conduct the audit process as well.

The application has a dashboard to view daily transactions and related details. The application also supports features to create and manage Customers, Teams, Subsidiaries, and Departments.

Payment request and Transactions summary features are the main features of the application. The application enables the user to use the payment request feature to initiate payments request to the customers and then track the status of the transaction through the transaction feature that displays data spread across 4 different transaction status.

3 User roles and permissions

To access the application a user must be in the Pay-By-Link user list.

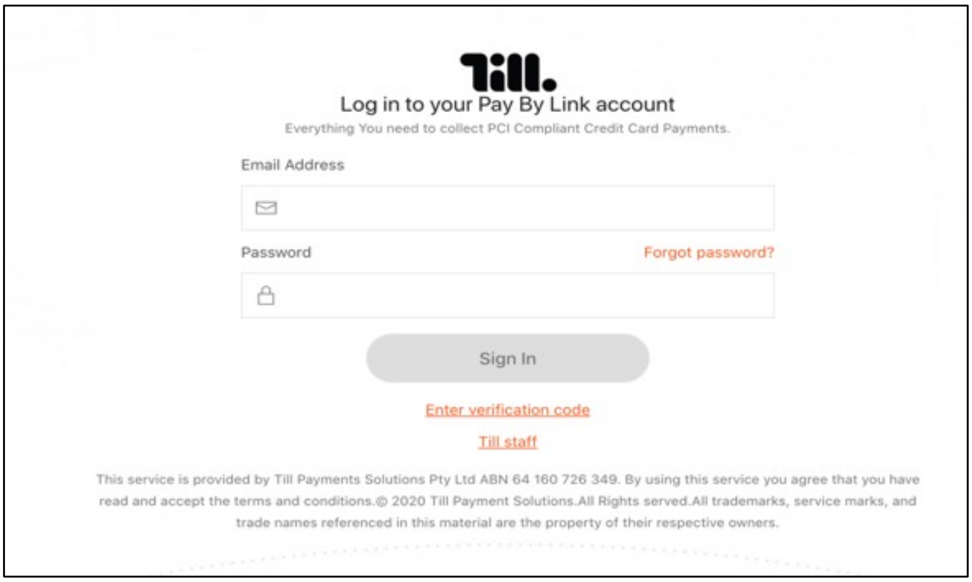
3.1 User Types

Every team member will have different permissions and settings available to them. This guide will demonstrate all features available to users. If you find yourself requiring different features that are displayed below but unavailable to you, please contact your manager or top level merchant, and they will be able to edit your permissions.

More on editing permissions is shown below in the “Business Settings” section.

4 Accessing the application

Launch the login screen of Pay-By-Link.



5 Merchants

There are 3 options on the side bar. The first is the merchants tab. Here, you can view your organisation, and sub divisions. If you hover over a subdivision, you can select “Sign in” to sign into that subdivision.

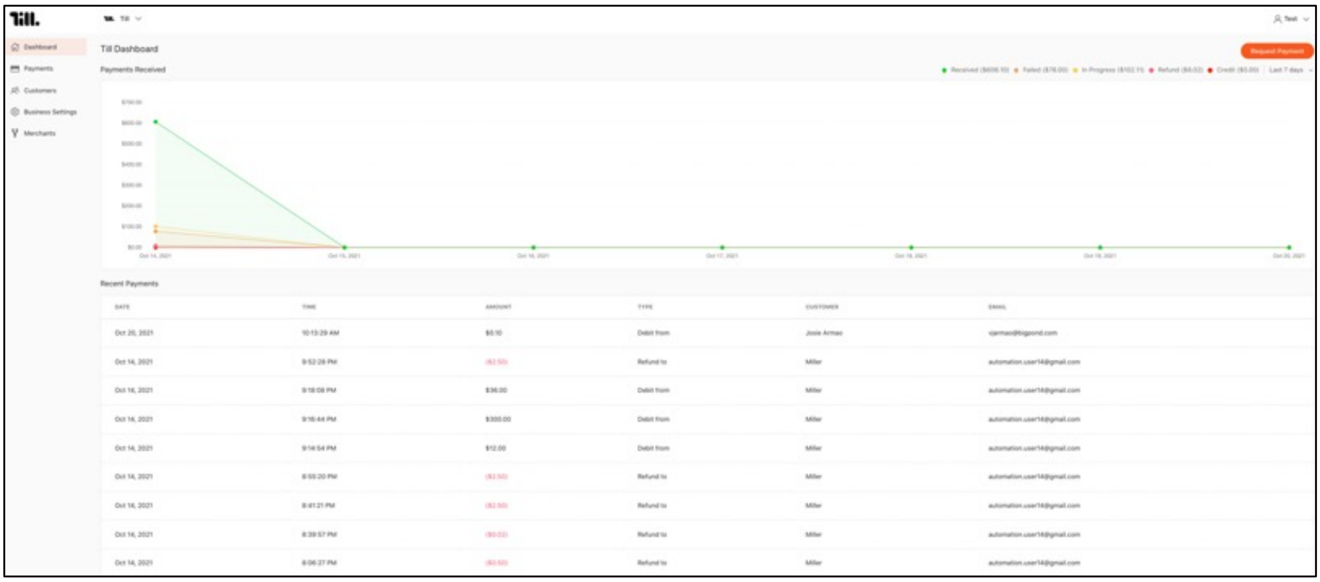
5.1 Sign in

5.2 Create sub-division

Our onboarding team will assist in creating subdivisions to ensure this is linked appropriately.

6 Dashboard

If you select dashboard on the side bar, you will see this screen.

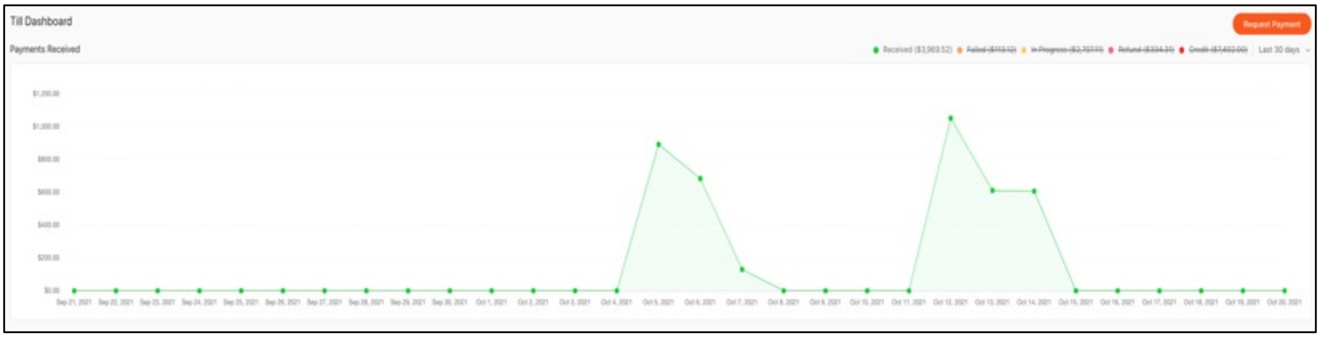


Here, you can:

- View recent payments
- Filter recent payments by different times and status (received, failed, refund etc)
- Request payment from a customer

6.1 Viewing Payments

You can filter by transaction type by selecting different options on the top right. In this example we are viewing payments received. You can change the time frame of viewed payments by selecting the dropdown menu on the far right. Here, we see the last 30 days of payments received.

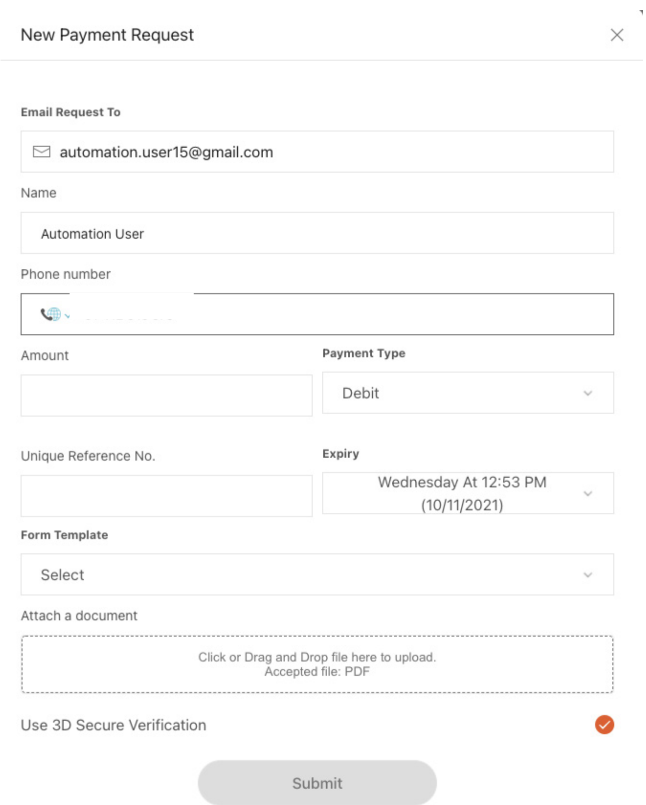


6.2 Payment Request

If you select the orange "Request Payment" button on the top right, you can create a new payment request. The following pop up screen will appear.

6.2.1 Payment Request - New Customer

Ability to send through a Payment request for a new customer

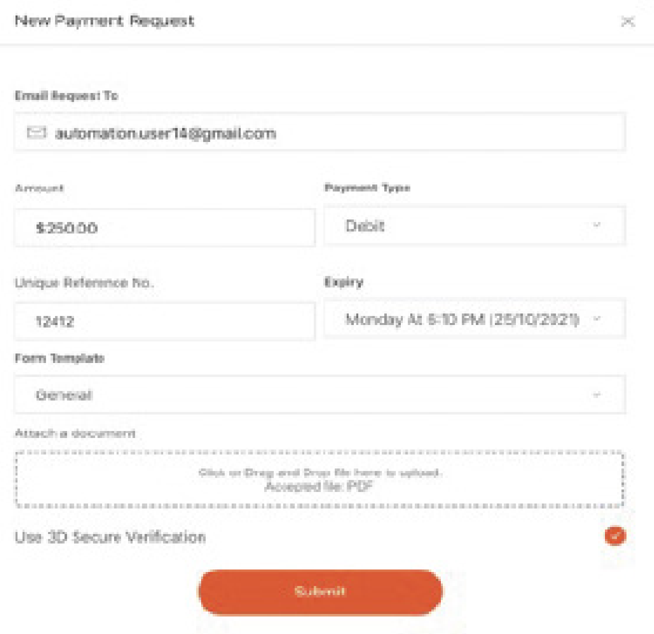


Complete the compulsory fields in order to process a successful payment request:

Email:
Name:
Phone Number: Use the drop down to select your globe or enter your country code into the phone number area.
Amount:
Payment Type:
Unique Reference:
Expiry:
Form Template:

6.2.2 Payment Request - Existing Customer

Once a payment request is prompted for an existing customer by inputting the email, Phone number and Name will not be required to be completed. Please ensure details are still valid.



Complete the necessary fields in order to process a successful payment request:

Amount:

Payment Type:

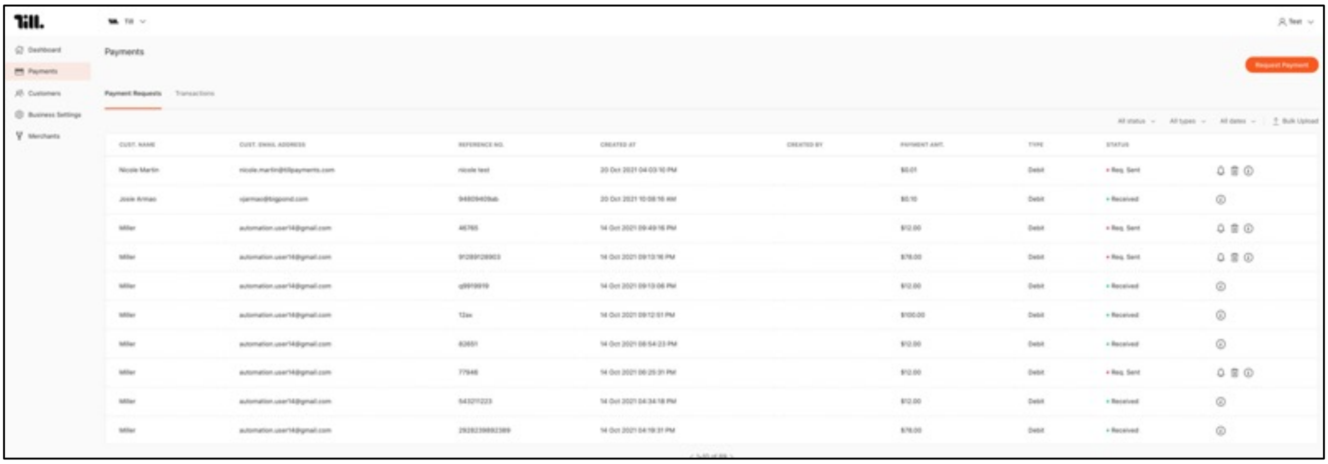
Unique Reference:

Expiry:

Form Template:

7 Payments

If you select "Payments" on the side bar, this screen will be shown.



There are two tabs on the Payments page, Payment Requests and Transactions.

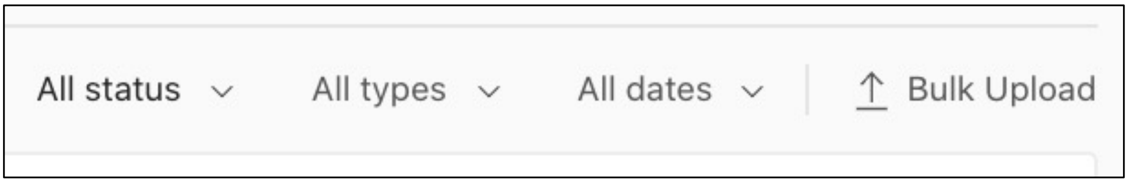
7.1 Payment Requests

On the payment requests tab, you can see payment requests that have been sent to customers.

These details about the payment request are shown:

- Customer's name
- Customer's email
- Payment reference number
- The date the payment was created
- Whom it was created by
- The amount owed
- Payment type
- Status of the payment

You can filter

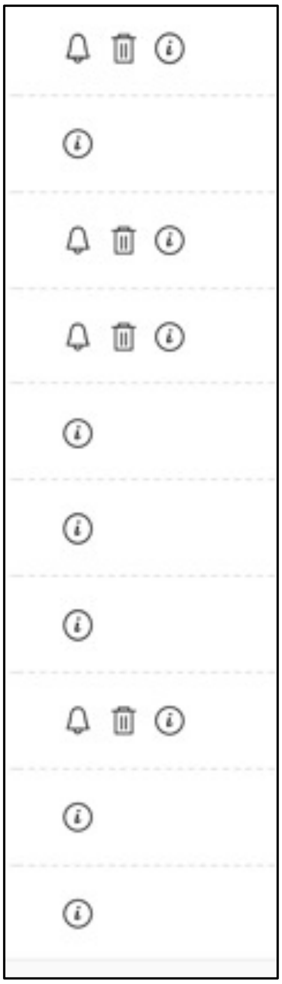


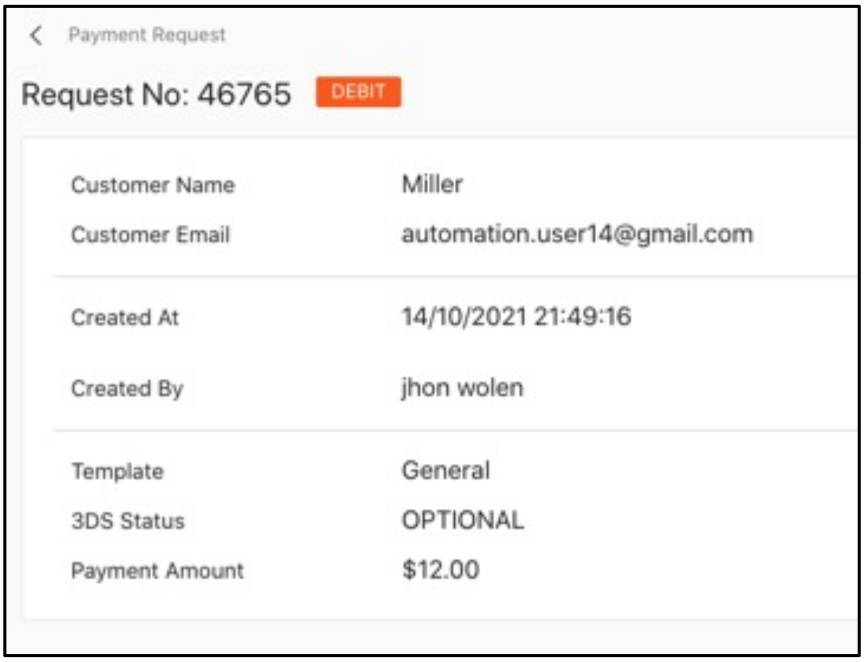
In the furthest right column, you can sort the payments by status, type, and date.

Bell icon: If you select this icon, it will send a reminder to the customer about this payment.

Trash icon: If you select this icon, it will cancel a payment request, changing its status to “Cancelled”.

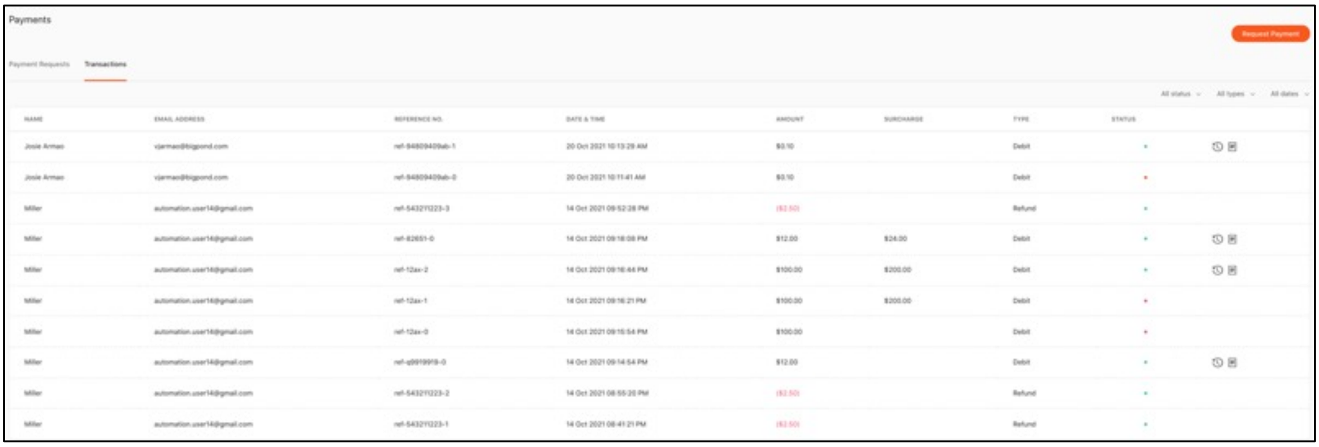
Information icon: If you select this icon, it will open a page with details about the payment request like below.



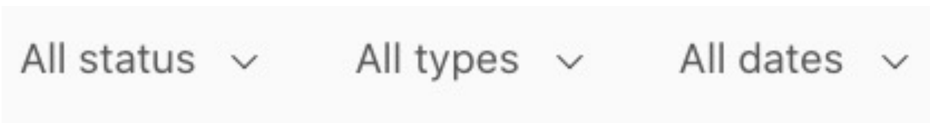


7.2 Transactions

Upon selecting the transactions tab, you will see a page like this.

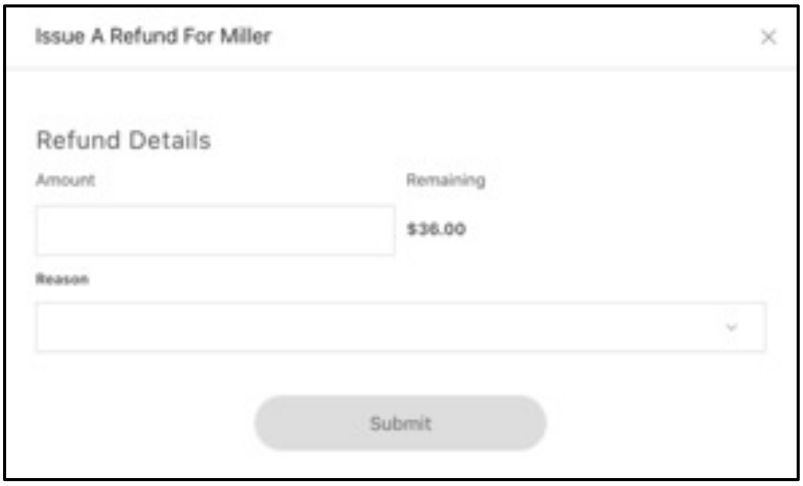


It displays transactions, and can also be filtered by status, type and dates using the dropdown menus on the top right.



In the far right column you will see these two icons.

The rewind icon allows you to refund a transaction. It will open this pop up.
You can choose the amount to refund, and select a reason why.



The receipt icon allows you to download a receipt for the transaction.

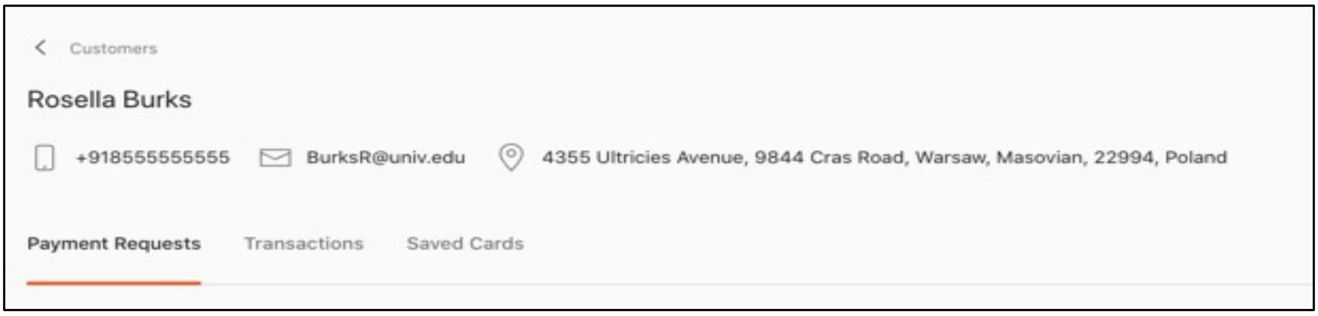
On both the payment request and transaction tabs, you can select the Request Payment button. This works as outlined in 6.2, requesting payments.

8 Customers

If you select the customers tab, this screen will be shown.

It displays all customers, and you can cycle pages by selection the arrows at the bottom.

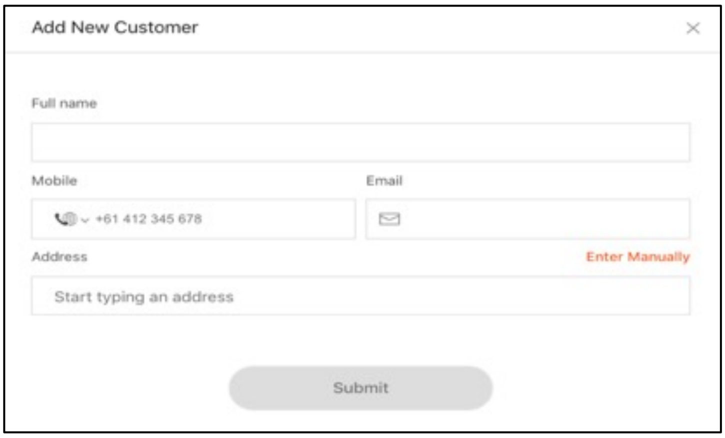
If you select the information icon on the far right, it will display the customers information.



You can see their payment requests, transactions and saved cards. You can also request a payment from this customer on the page.

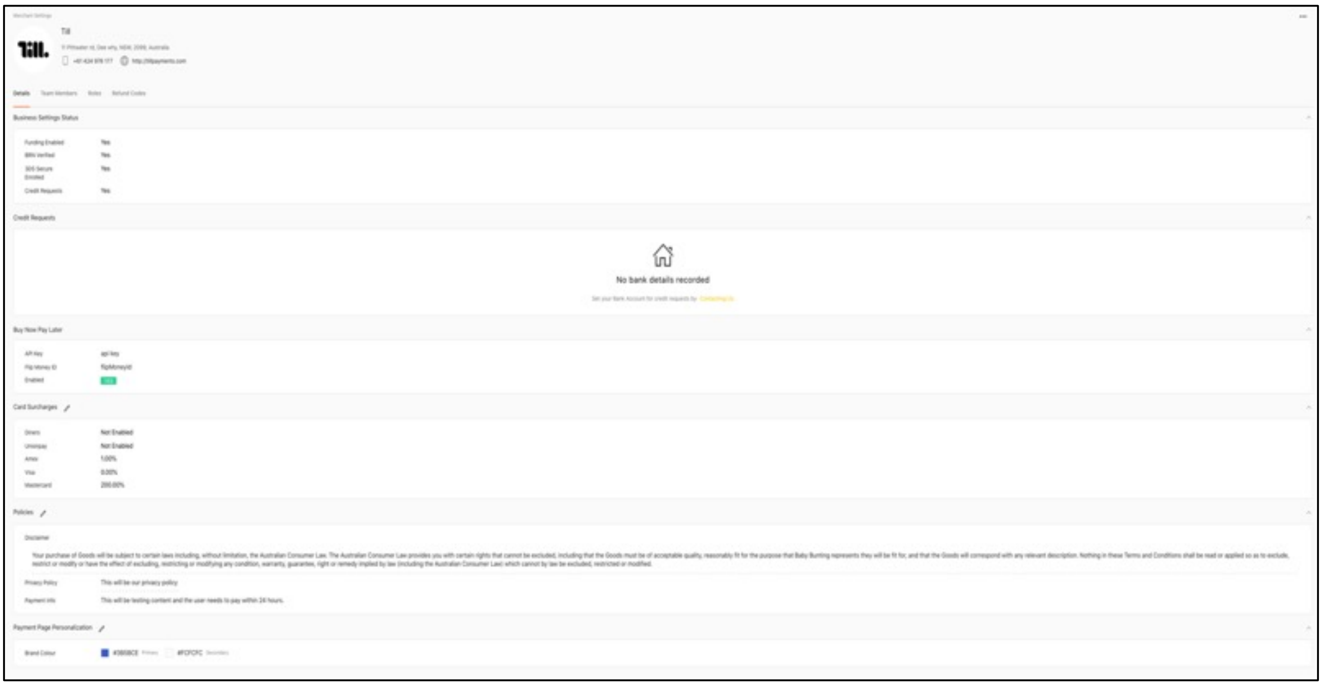
8.1 Adding a new customer

You can add a customer by selecting Add Customer on the top right.



9 Business Settings

Selecting “Business Settings” from the sidebar will show this screen.

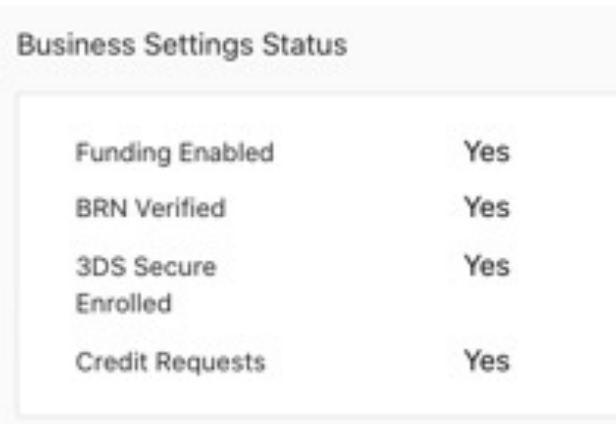


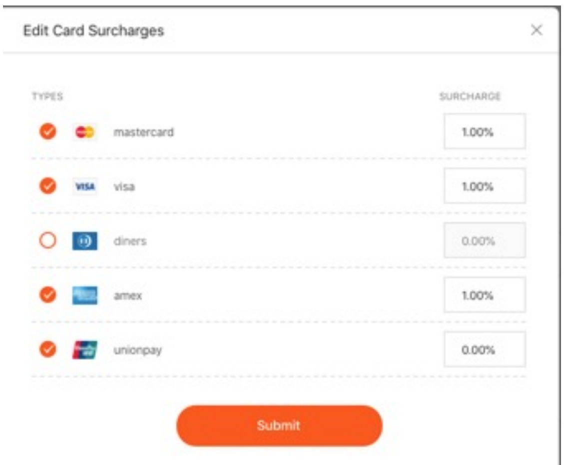
This page has 4 tabs:

- Details
- Team Members
- Roles
- Refund Codes

9.1 Details

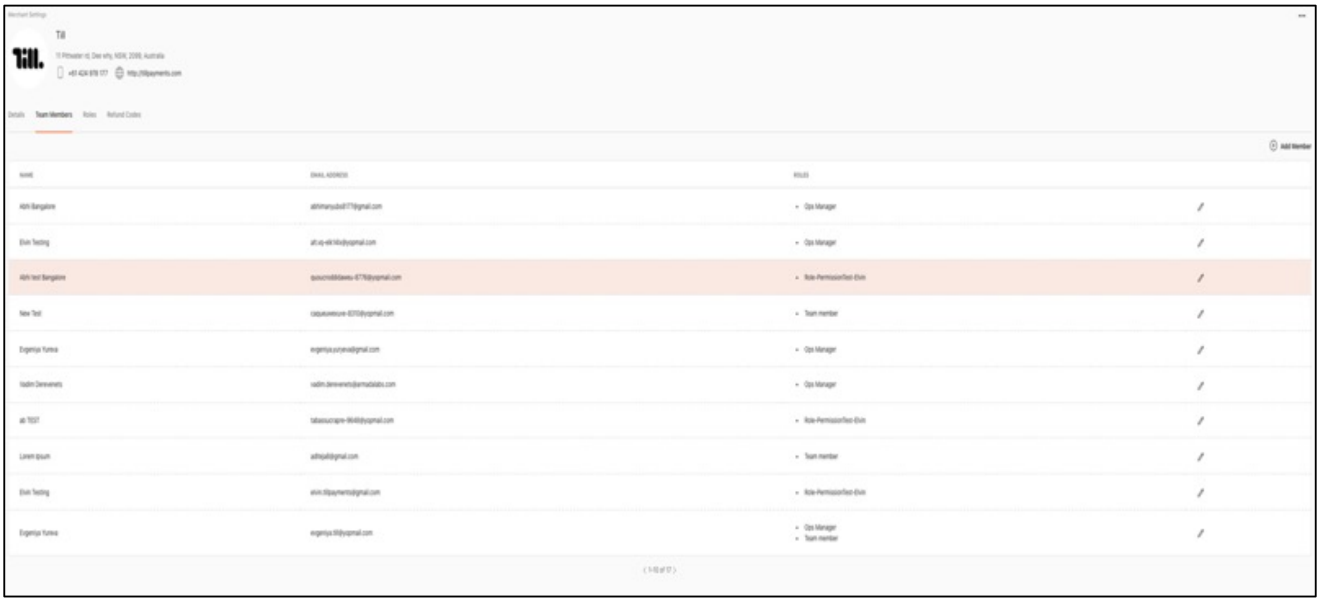
On the details page, you can view business settings status, credit requests, buy now pay later, edit card surcharges, edit policies, and personalise your payment page.



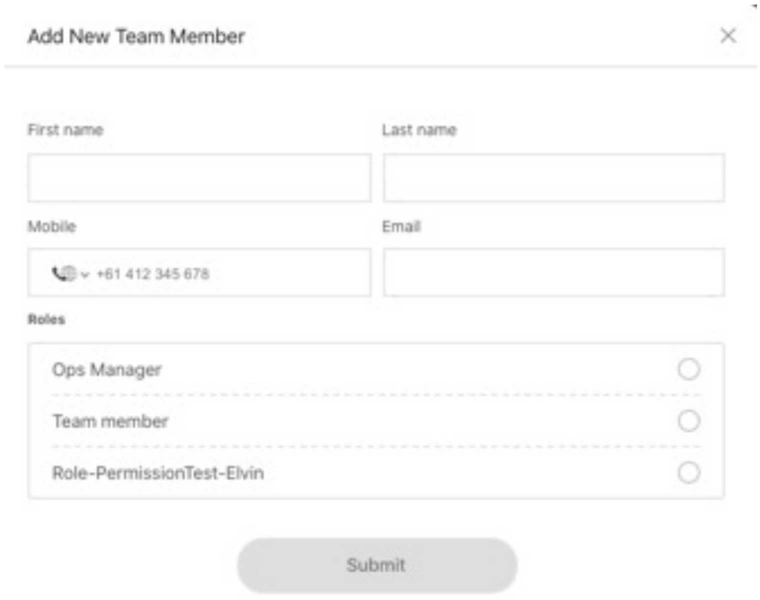


9.2 Team members

On the team members page, you can add new team members or manage an existing team members roles.



To add a new team member, select the "**Add Member**" button on the top right.

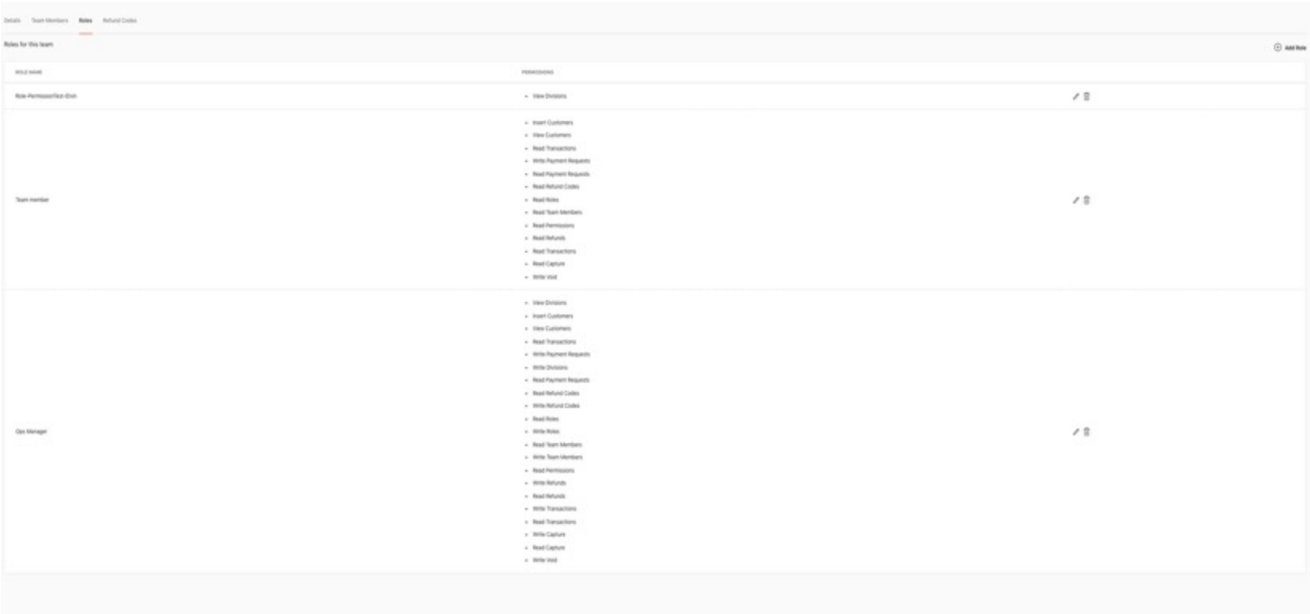


The roles you select will determine what permissions the new team member has.

On each team member, if you select this edit icon, you alter their selected roles.

9.3 Roles

On the Roles tab, you can edit the permissions for existing roles, or delete a role entirely. You can also add a new role.



Select Add role on the top right to create a new role and choose its permissions.

9.4 Refund Codes

The final tab is Refund Codes. Here, you can edit existing refund codes or create new ones.

Create a new refund code by selection Add Code on the top right.

Now you can use this refund code when submitting refunds.

If you require any further assistance, please do not hesitate to contact our support team.