



PAY-BY-LINK

A TILL PAYMENTS APPLICATION

User Guide

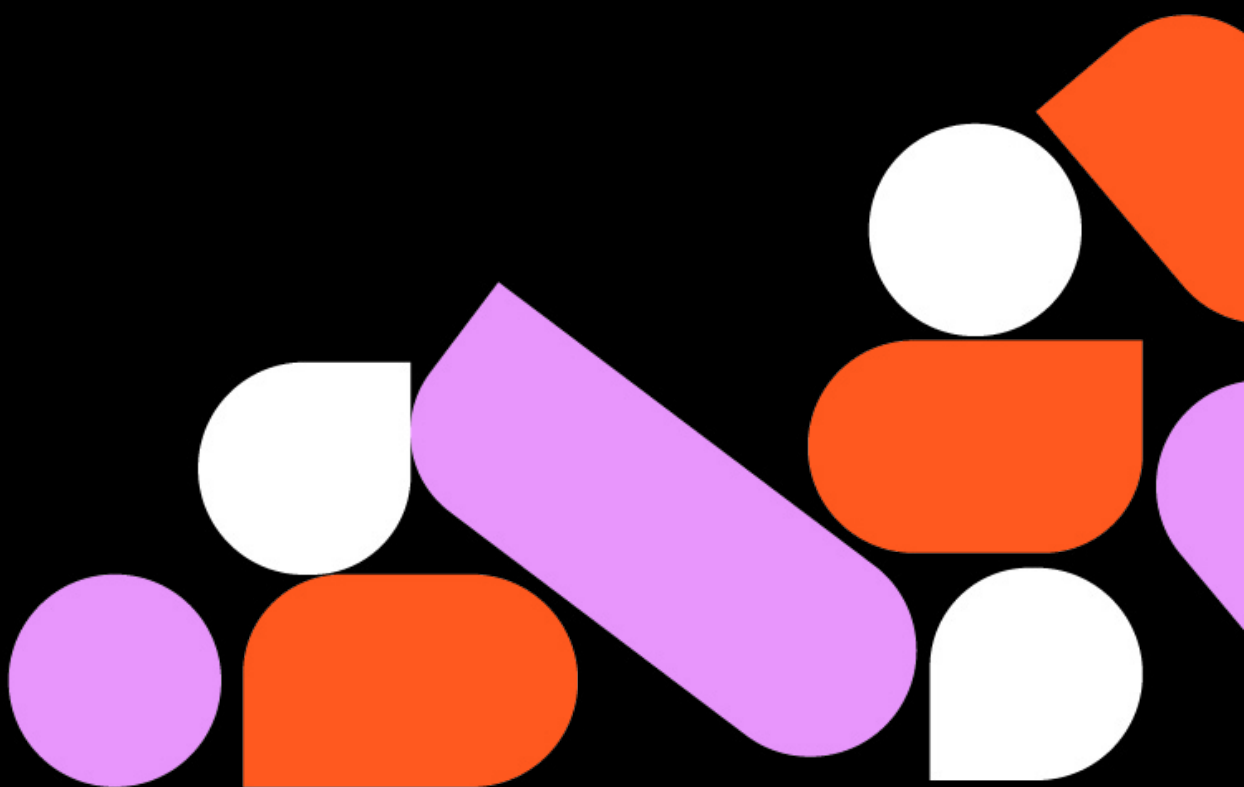


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1 Document Introduction

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.

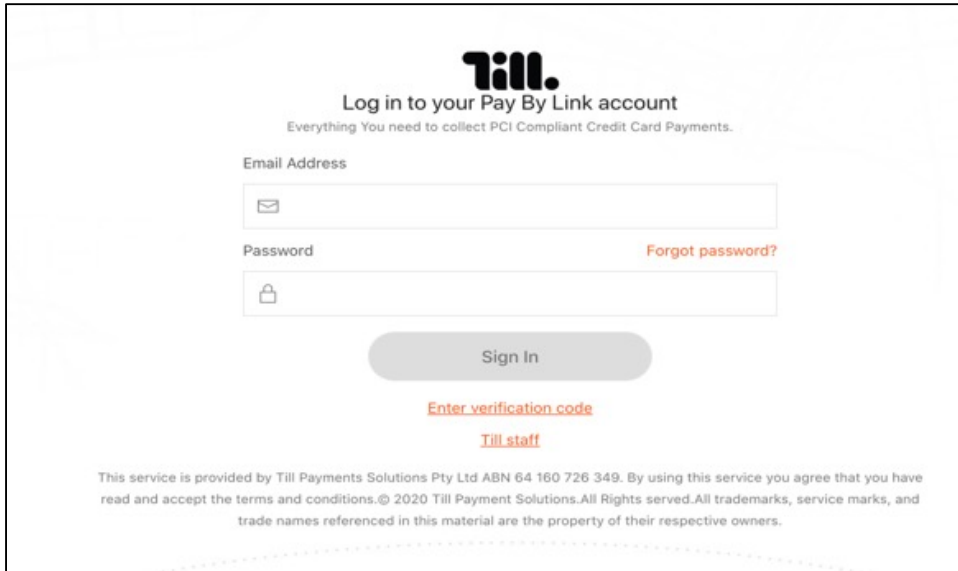
3.1 User Types

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.

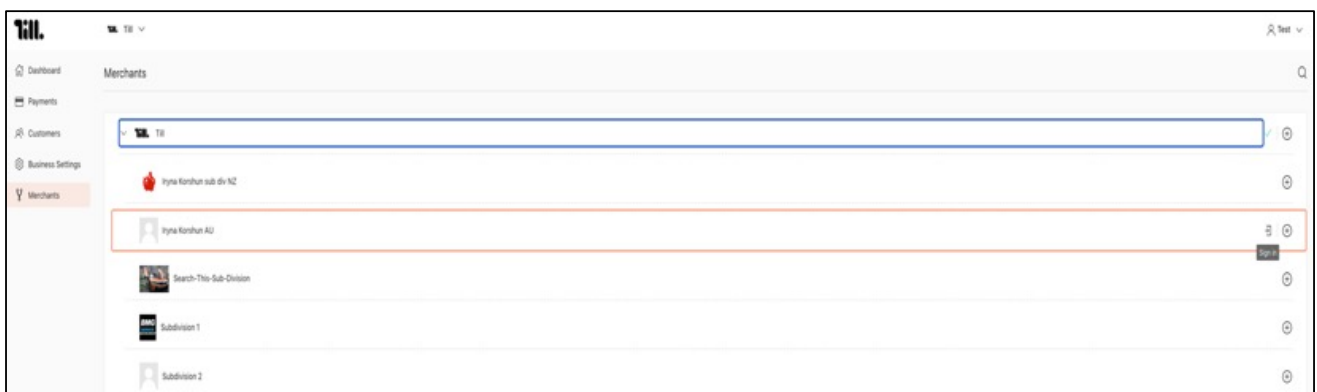


The screenshot shows the login interface for Till Pay By Link. At the top is the Till logo. Below it, the text reads "Log in to your Pay By Link account" and "Everything You need to collect PCI Compliant Credit Card Payments." There are two input fields: "Email Address" with an envelope icon and "Password" with a lock icon. A "Forgot password?" link is next to the password field. Below the fields is a "Sign In" button. Underneath the button are two links: "Enter verification code" and "Till staff". At the bottom, a small disclaimer states: "This service is provided by Till Payments Solutions Pty Ltd ABN 64 160 726 349. By using this service you agree that you have read and accept the terms and conditions. © 2020 Till Payment Solutions. All Rights served. All trademarks, service marks, and trade names referenced in this material are the property of their respective owners."

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.

Add Sub Division

Business Details

Business Name

BRN

Phone number

Address Details

Address Line 1

Address Line 2

State

Country

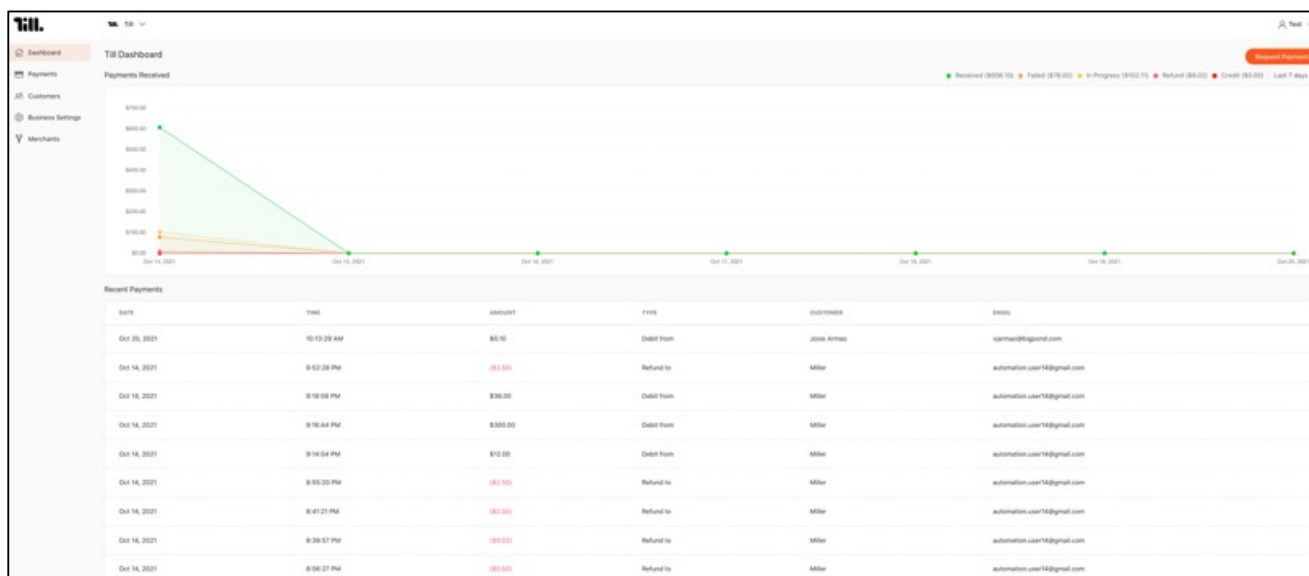
City

Post Code

Submit

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

New Payment Request

Email Request To

automation.user15@gmail.com

Name

Automation User

Phone number

+61 1234 567890

Amount

100.00

Payment Type

Debit

Unique Reference No.

Expiry

Wednesday At 12:53 PM (10/11/2021)

Form Template

Select

Attach a document

Click or Drag and Drop file here to upload. Accepted file: PDF

Use 3D Secure Verification

Submit

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.

New Payment Request

Email Request To
automaton.user14@gmail.com

Amount
\$250.00

Payment Type
Debit

Unique Reference No.
12412

Expiry
Monday At 5:10 PM (25/10/2021)

Form Template
General

Attach a document
Click or Drag and Drop file here to upload.
Accepted file: PDF

Use 3D Secure Verification

Submit

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.

CUST. NAME	CUST. EMAIL ADDRESS	REFERENCE NO.	CREATED AT	CREATED BY	PAYMENT AMT.	TYPE	STATUS
Nicole Martin	Nicole.Martin@payments.com	nicole test	20 Oct 2021 04:03:10 PM		\$0.01	Debit	+ Req. Sent
Josie Armas	ejames@iguard.com	948094766	20 Oct 2021 10:08:10 AM		\$0.10	Debit	+ Received
tiller	automaton.user14@gmail.com	46765	14 Oct 2021 09:49:16 PM		\$12.00	Debit	+ Req. Sent
tiller	automaton.user14@gmail.com	91289128912	14 Oct 2021 09:13:16 PM		\$18.00	Debit	+ Req. Sent
tiller	automaton.user14@gmail.com	4919819	14 Oct 2021 09:13:06 PM		\$12.00	Debit	+ Received
tiller	automaton.user14@gmail.com	124	14 Oct 2021 09:12:01 PM		\$100.00	Debit	+ Received
tiller	automaton.user14@gmail.com	62691	14 Oct 2021 09:54:23 PM		\$10.00	Debit	+ Received
tiller	automaton.user14@gmail.com	77946	14 Oct 2021 09:25:31 PM		\$12.00	Debit	+ Req. Sent
tiller	automaton.user14@gmail.com	54321232	14 Oct 2021 04:34:18 PM		\$12.00	Debit	+ Received
tiller	automaton.user14@gmail.com	292812882389	14 Oct 2021 04:18:31 PM		\$18.00	Debit	+ Received

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



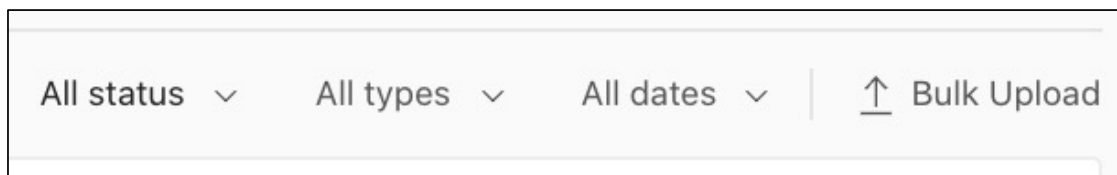
7.1 Payment Requests

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

A screenshot of a filter bar for payment requests. It contains three dropdown menus: 'All status' with a downward arrow, 'All types' with a downward arrow, and 'All dates' with a downward arrow. To the right of these is a vertical separator line, followed by an upward arrow icon and the text 'Bulk Upload'.

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.

Payment Request

Request No: 46765

DEBIT

Customer Name

Miller

Customer Email

automation.user14@gmail.com

Created At

14/10/2021 21:49:16

Created By

jhon wolen

Template

General

3DS Status

OPTIONAL

Payment Amount

\$12.00



7.2 Transactions

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

Payments								Request Payment
Payment Requests	Transactions							
NAME	EMAIL ADDRESS	REFERENCE NO.	DATE & TIME	AMOUNT	SURCHARGE	TYPE	STATUS	
Joske Arman	carmaed@igmond.com	ref-84809403ab-1	20 Oct 2021 10:13:29 AM	\$0.10		Debit		
Joske Arman	carmaed@igmond.com	ref-84809403ab-0	20 Oct 2021 10:11:41 AM	\$0.10		Debit		
Miller	automation.user14@gmail.com	ref-54321023-3	14 Oct 2021 09:52:08 PM	(\$2.50)		Refund		
Miller	automation.user14@gmail.com	ref-82601-0	14 Oct 2021 09:16:09 PM	\$12.00	\$24.00	Debit		
Miller	automation.user14@gmail.com	ref-123x-2	14 Oct 2021 09:16:44 PM	\$100.00	\$200.00	Debit		
Miller	automation.user14@gmail.com	ref-123x-1	14 Oct 2021 09:16:21 PM	\$100.00	\$200.00	Debit		
Miller	automation.user14@gmail.com	ref-123x-0	14 Oct 2021 09:16:04 PM	\$100.00		Debit		
Miller	automation.user14@gmail.com	ref-q9919919-0	14 Oct 2021 09:14:54 PM	\$12.00		Debit		
Miller	automation.user14@gmail.com	ref-54321023-2	14 Oct 2021 09:55:26 PM	(\$2.50)		Refund		
Miller	automation.user14@gmail.com	ref-54321023-1	14 Oct 2021 09:41:21 PM	(\$2.50)		Refund		

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

All status ▾

All types ▾

All dates ▾



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.

Issue A Refund For Miller

Refund Details

Amount

Remaining

\$36.00

Reason

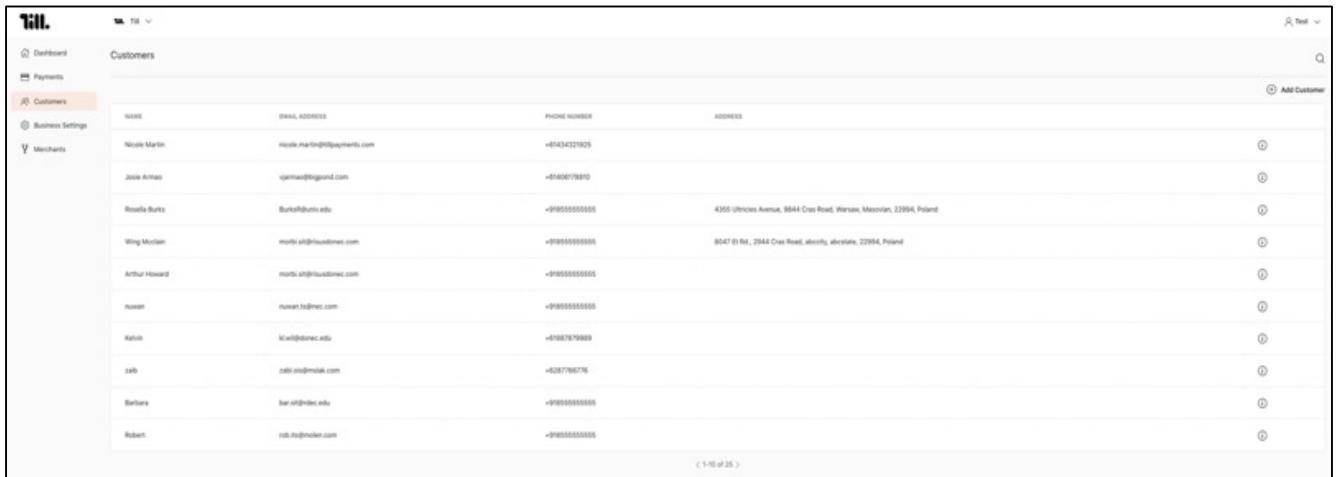
Submit

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

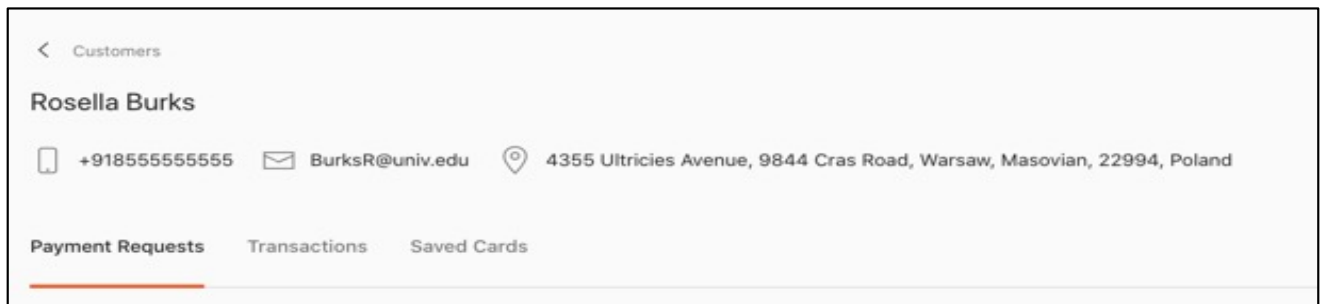
If you select the customers tab, this screen will be shown.



NAME	EMAIL ADDRESS	PHONE NUMBER	ADDRESS
Nicole Martin	nicole.martin@payments.com	+91434327925	
Joak Arman	joakman@igoland.com	+91408178912	
Rosella Burks	BurksR@univ.edu	+9185555555555	4355 Ultricies Avenue, 9844 Cras Road, Warsaw, Masovian, 22994, Poland
Wing Morlan	morlw@customers.com	+9185555555555	9247 El Rd., 2044 Cras Road, abercy, abercy, 22994, Poland
Arthur Howard	howar@customers.com	+9185555555555	
Rusan	rusan.h@mei.com	+9185555555555	
Katrin	kat@idonec.edu	+91857879889	
Jaki	jaki.on@mek.com	+9287786776	
Barbara	bar.v@idoc.edu	+9185555555555	
Robert	rob.h@moder.com	+9185555555555	

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.



< Customers

Rosella Burks

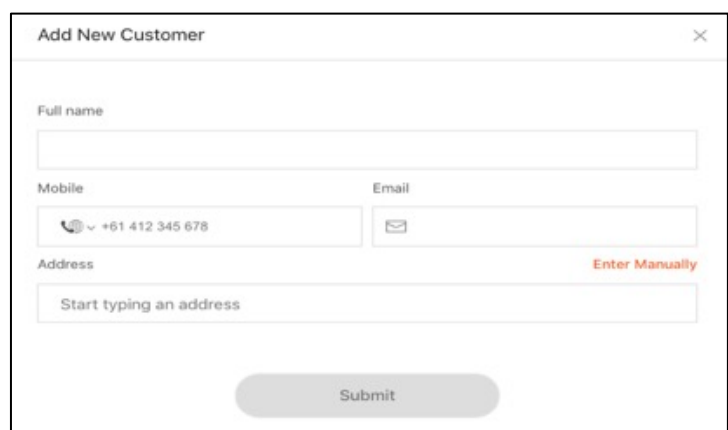
+9185555555555 BurksR@univ.edu 4355 Ultricies Avenue, 9844 Cras Road, Warsaw, Masovian, 22994, Poland

Payment Requests Transactions Saved Cards

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.



Add New Customer

Full name

Mobile Email

+61 412 345 678 Enter Manually

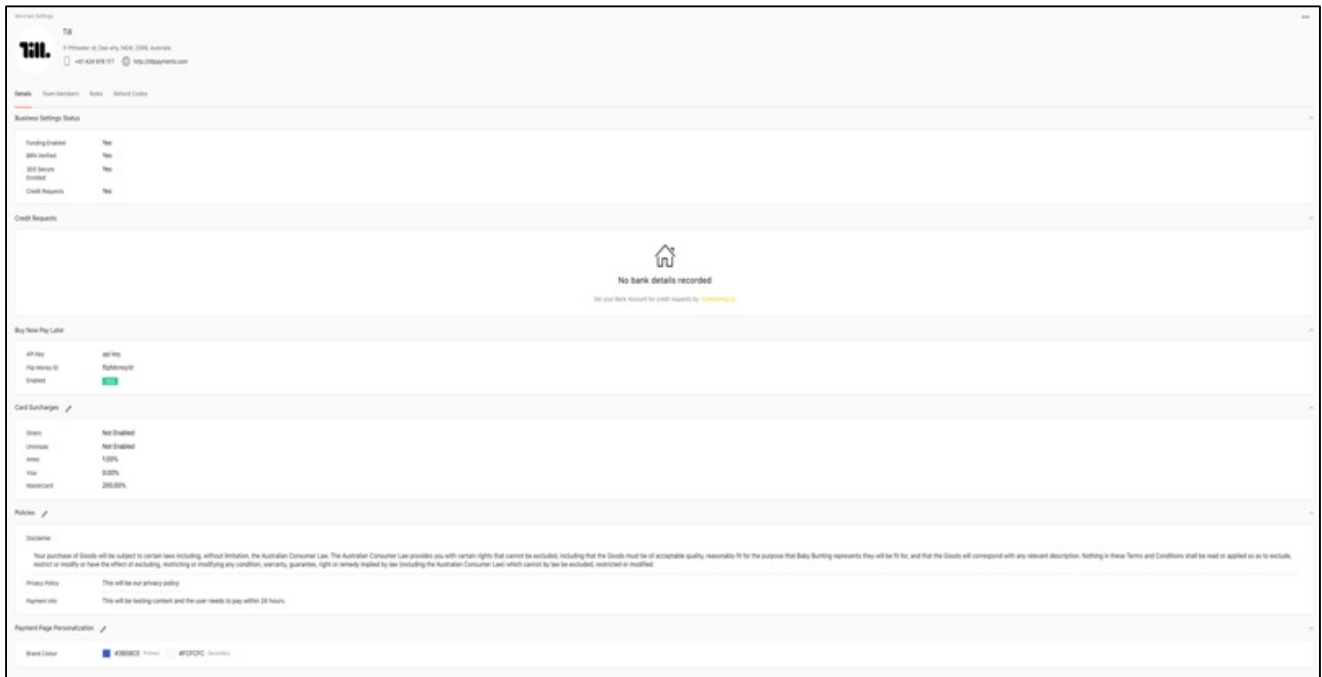
Address

Start typing an address

Submit

9 Business Settings

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

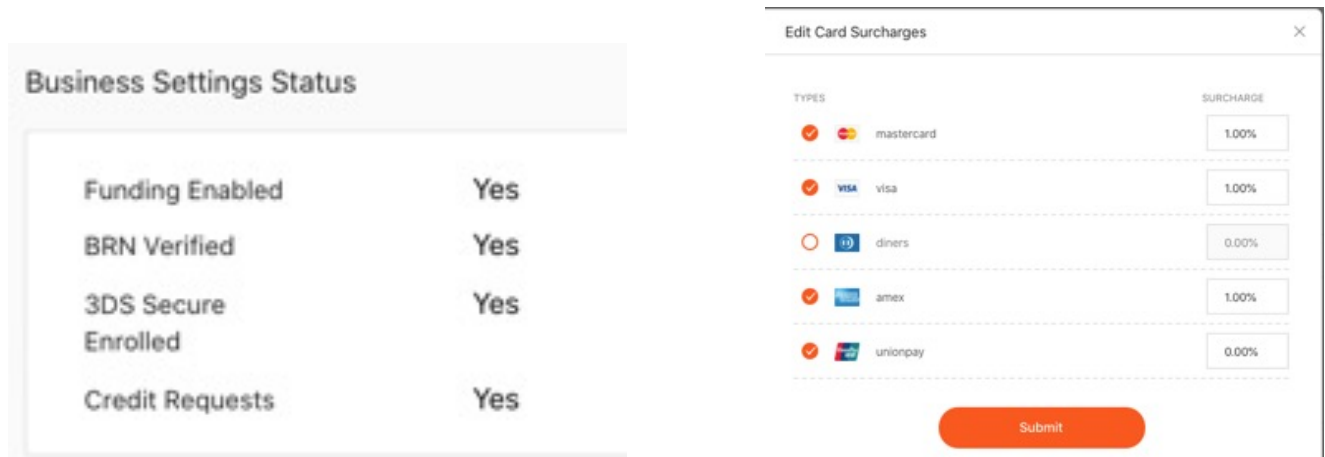


This page has 4 tabs:

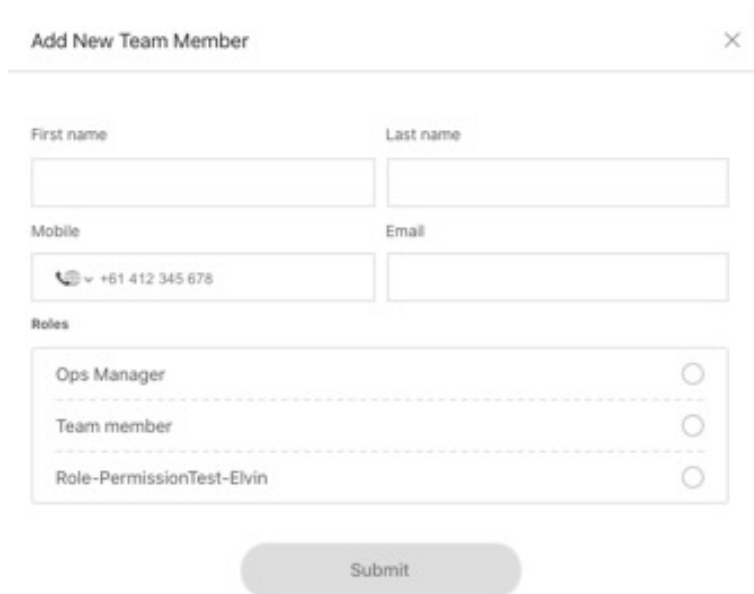
- ◆ Details
- ◆ Team Members
- ◆ Roles
- ◆ Refund Codes

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.



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



The form is titled "Add New Team Member" and includes a close button (X) in the top right corner. It contains the following fields:

- First name** and **Last name**: Two text input fields.
- Mobile**: A text input field with a phone icon and a default number "+61 412 345 678".
- Email**: A text input field.
- Roles**: A list of roles with radio buttons for selection:
 - Ops Manager
 - Team member
 - Role-PermissionTest-Elvin
- Submit**: A large, rounded button at the bottom.

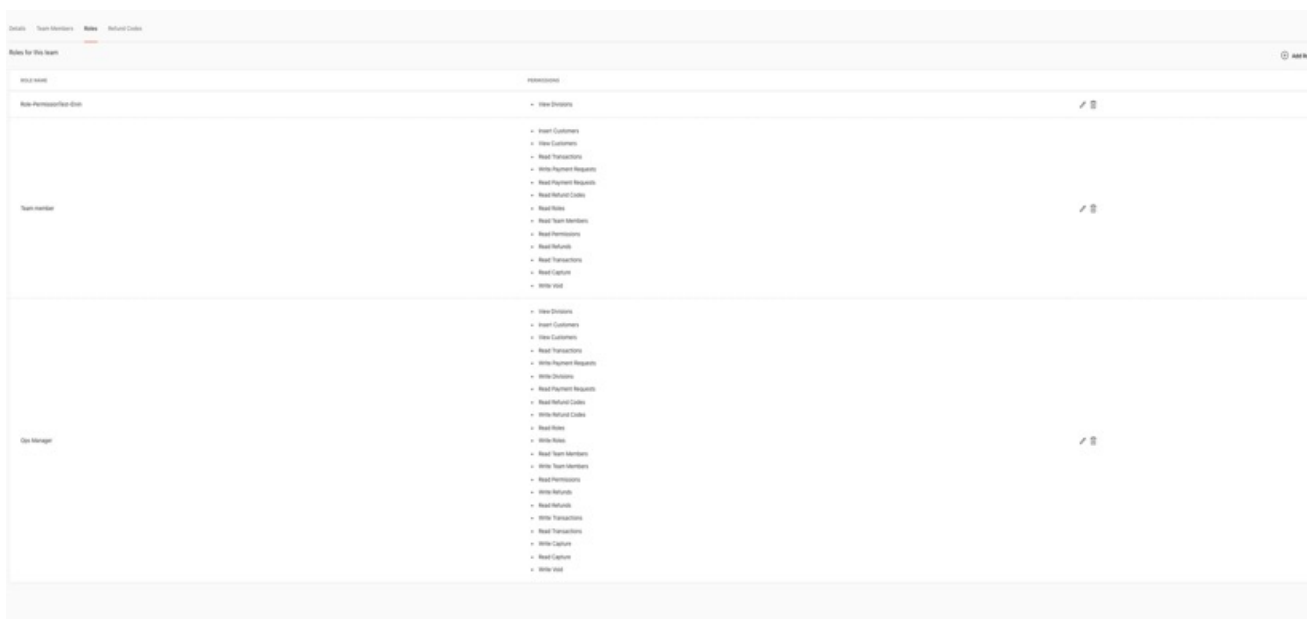
The roles you select will determine what permissions the new team member has.

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.



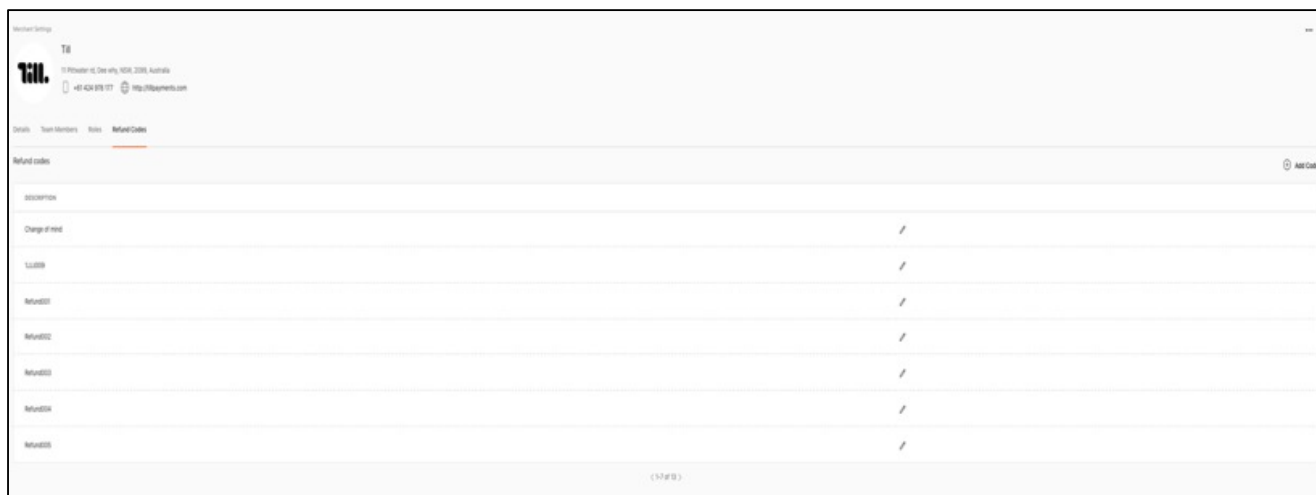
The interface shows a table of roles with the following columns: Role Name, Permissions, and an edit/delete icon. The roles listed are:

- Role-PermissionTest-Elvin**: Has a "New Role" button and a list of permissions including "Insert Customers", "Read Customers", "Read Transactions", "Write Payment Requests", "Read Payment Requests", "Read Refund Codes", "Read Roles", "Read Team Members", "Read Permissions", "Read Refunds", "Read Transactions", "Read Customers", and "Write Web".
- Team member**: Has a list of permissions including "Insert Customers", "Read Customers", "Read Transactions", "Write Payment Requests", "Read Payment Requests", "Read Refund Codes", "Read Roles", "Read Team Members", "Read Permissions", "Read Refunds", "Read Transactions", "Read Customers", and "Write Web".
- Ops Manager**: Has a list of permissions including "Insert Customers", "Read Customers", "Read Transactions", "Write Payment Requests", "Read Payment Requests", "Read Refund Codes", "Read Roles", "Read Team Members", "Read Permissions", "Read Refunds", "Read Transactions", "Read Customers", and "Write Web".

Each role row has an edit icon (pencil) and a delete icon (X) in the rightmost column.

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.

A screenshot of the 'Add New Refund Code' modal form. The form has a title bar with a close button. Below the title bar, there is a text input field containing the text 'Wrong size'. Below the input field, there is an orange 'Submit' button.

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.**