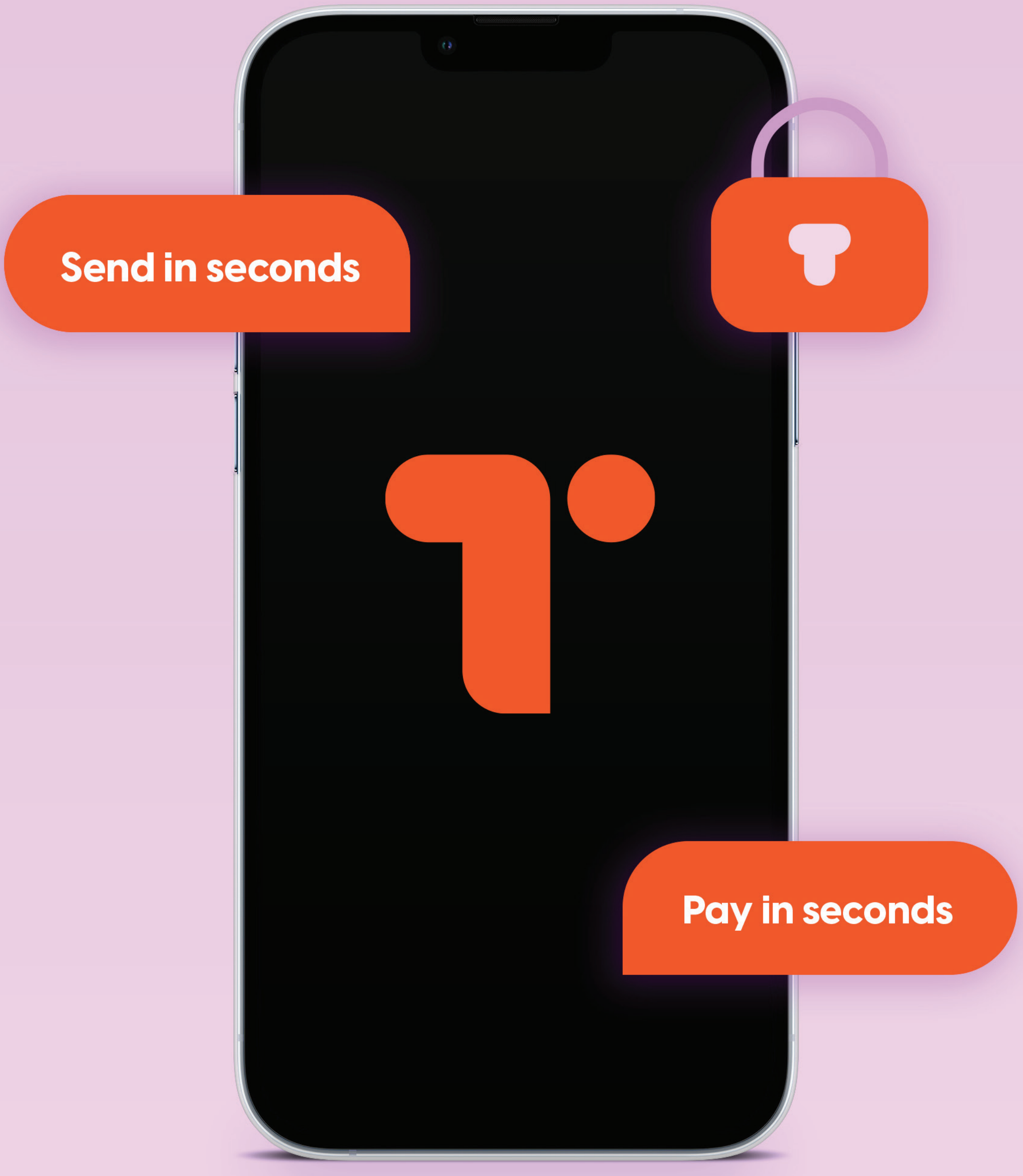
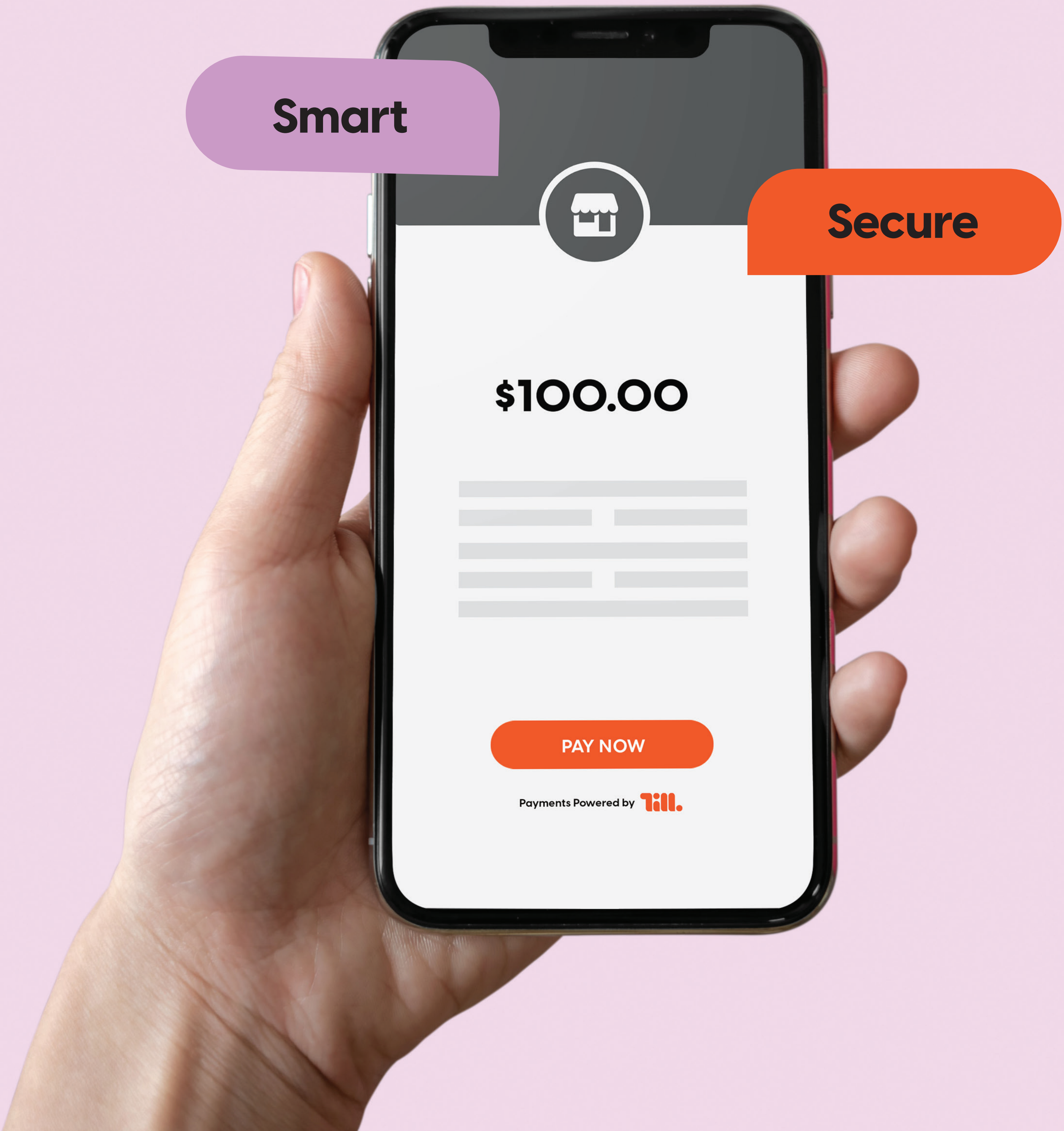


Pay By Link
User Guide

tillpayments.com

What's **Inside.**


Smart
Secure
$100.00
PAY NOW
Payments Powered by Till.

01 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.

02 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.

03 User roles and permissions

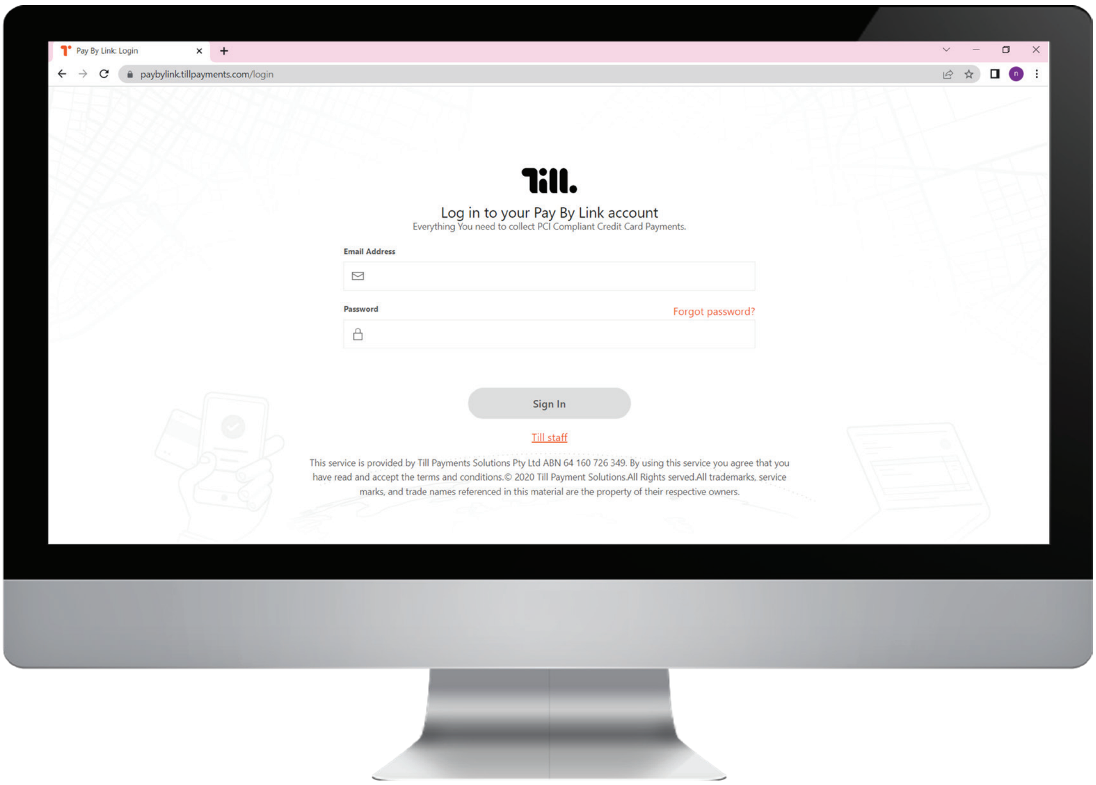
To access the application a user must be in the Pay-By-Link user list.

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.

04 Accessing the application

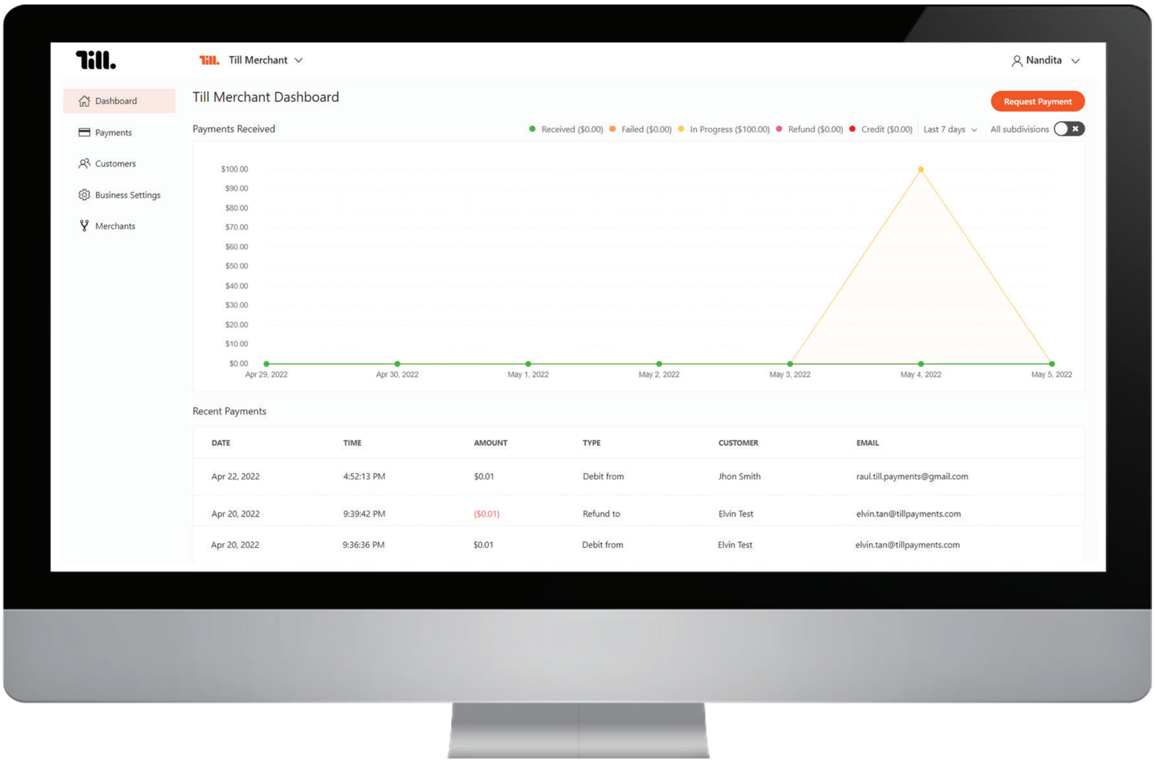
Click the URL below to launch the Pay-By-Link portal.
https://paybylink.tillpayments.com



If you have forgotten your password, please click "forgot password" to reset your password. If you are still unable to log on, please contact Till Support at **us-support@tillpayments.com** or call **347 991 5997**.

05 Merchant

Once you've logged on, you will see 5 options on the side bar. Select the "Merchants" tab to view your organization, and sub-divisions. When you hover over a sub-division, you will be able to sign into that sub-division by clicking the arrow.

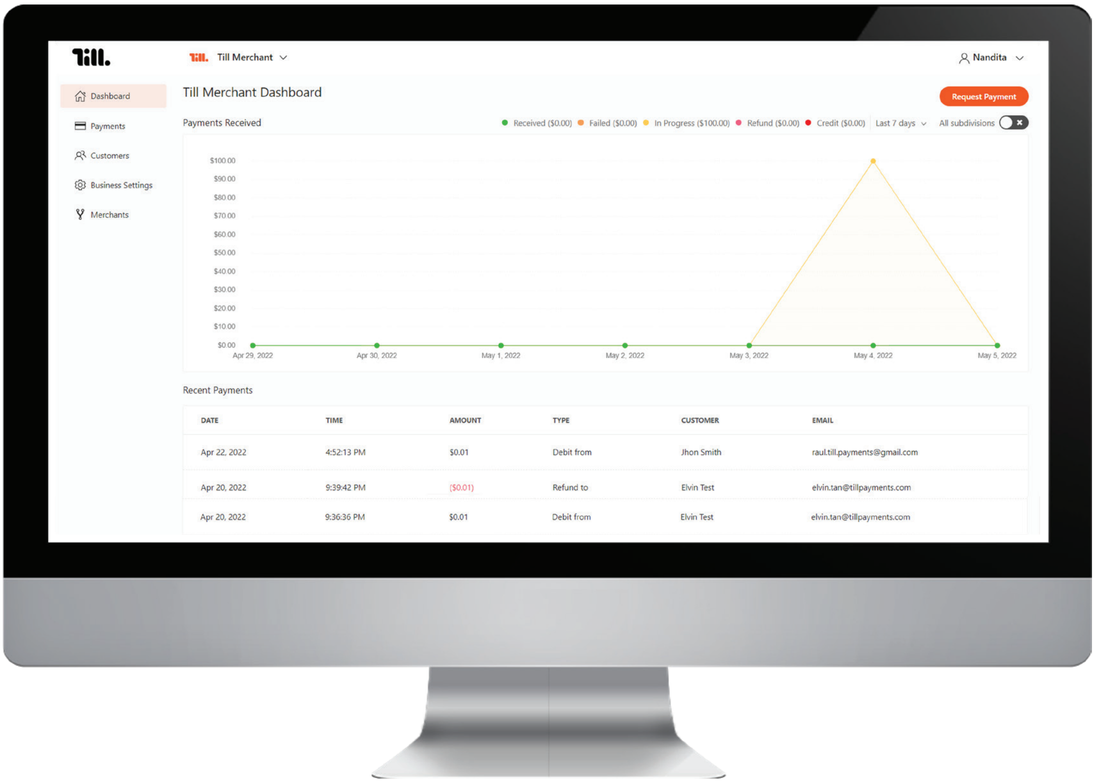


Please note: If you require a new sub-division to be added, please reach out to Till Support at **us-support@tillpayments.com** or call **347 991 5997** for assistance.

06 Dashboard

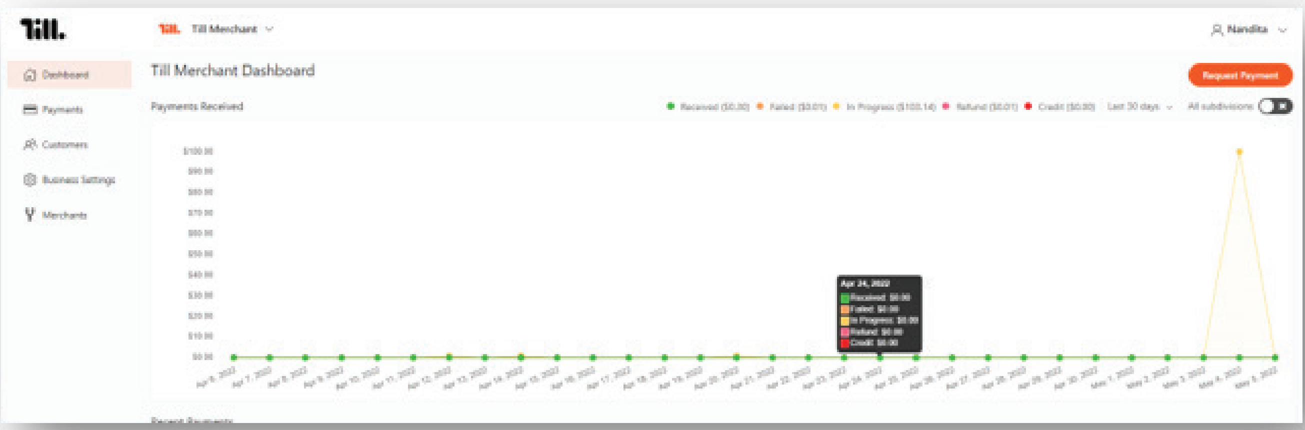
Once you have signed in, you will be able to see the dashboard of that sub-division, where you can:

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



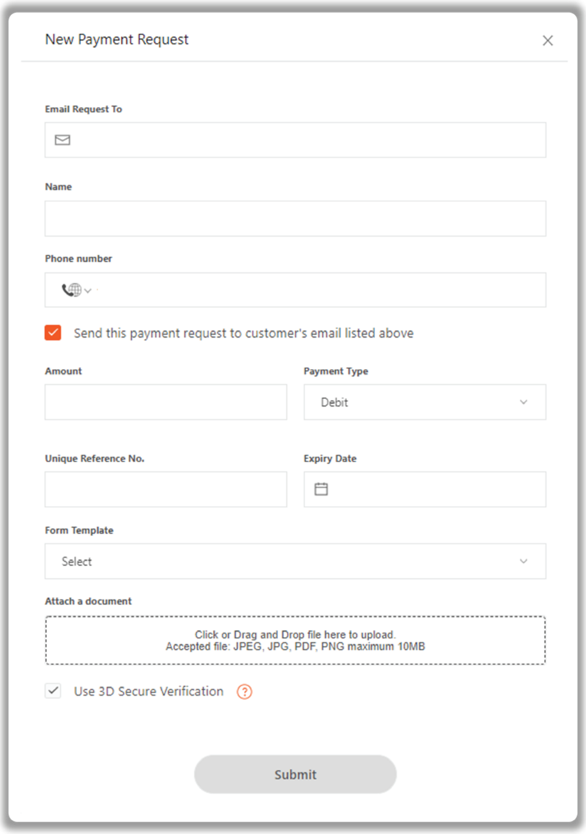
6.1 Viewing payments

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 drop down menu on the far right. In the example below, 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.



A Payment request - new customer

Ability to send through a Payment request for a new customer.

Complete the required 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: Add time-limits on your payment requests to encourage prompt payments and offer special incentives.

B Once a payment request is prompted for an existing customer by inputting the email address, phone number and name will not be required to be entered.

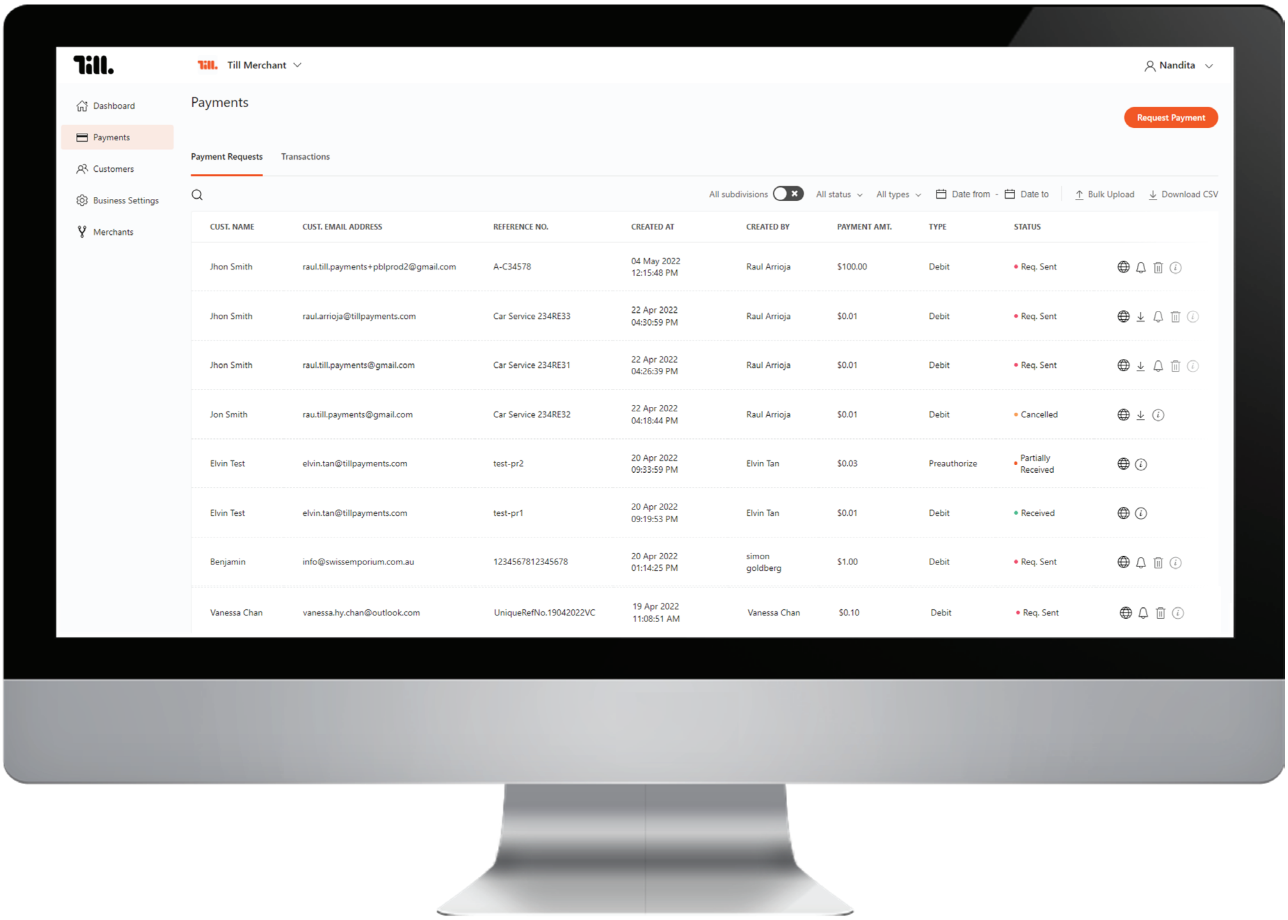
Please ensure details are still valid.

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

- Amount:
- Payment Type:
- Unique Reference:
- Expiry:
- Form Template:

07 Payment

If you select the “Payments” tab on the side bar, you will see this screen:



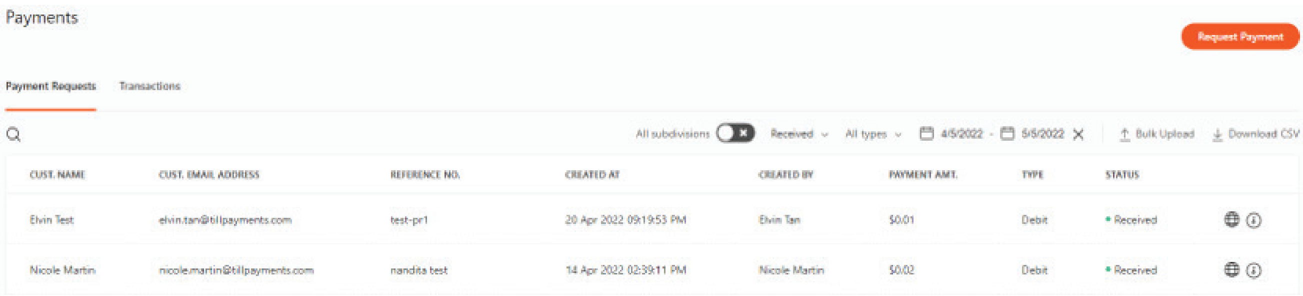
7.1 Payment requests

There are two tabs on the Payments page; **Payments Requests** and **Transactions.** On the payment requests tab, you can see payment requests that have been sent to customers.

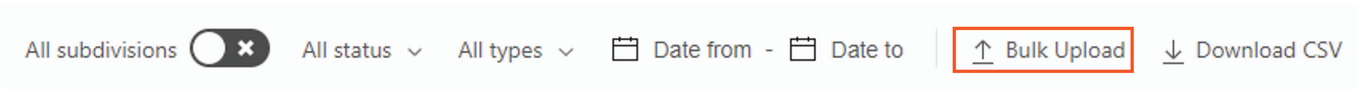
These details about the payment request are shown:

- 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 the view according to payment status, type and date using the filters on the top right. In this example we are viewing payments received within the last 30 days.

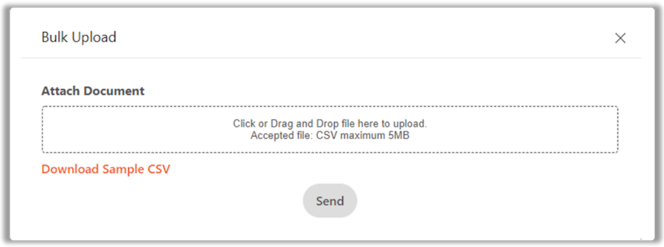


The bulk upload functionality allows Merchants to send multiple payment requests at the same time, instead of configuring each payment request separately. This can be used to automate process with Billing systems.



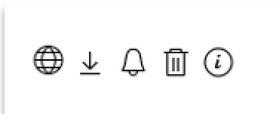
If you wish to use this feature, simply click on 'Bulk Upload' button, download the sample CSV file and fill in all the required. Information.

Please note that each **Reference Number** must be **unique** and to always choose the **'General'** template.

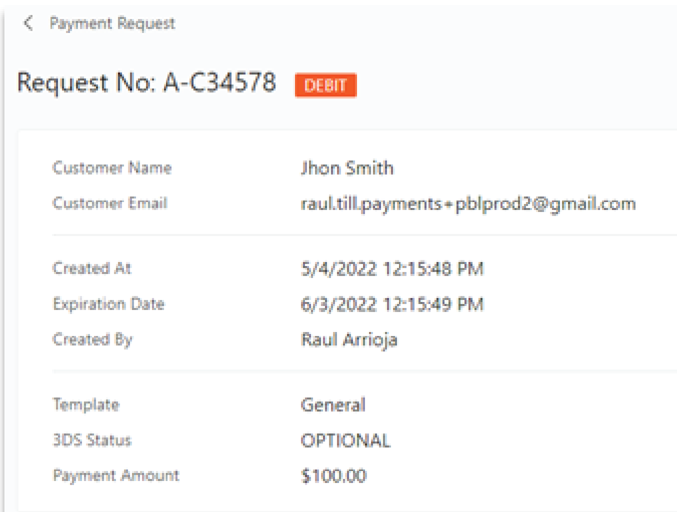


Icons

Within the Payment Request screen, you'll see several icons that have different functionality.

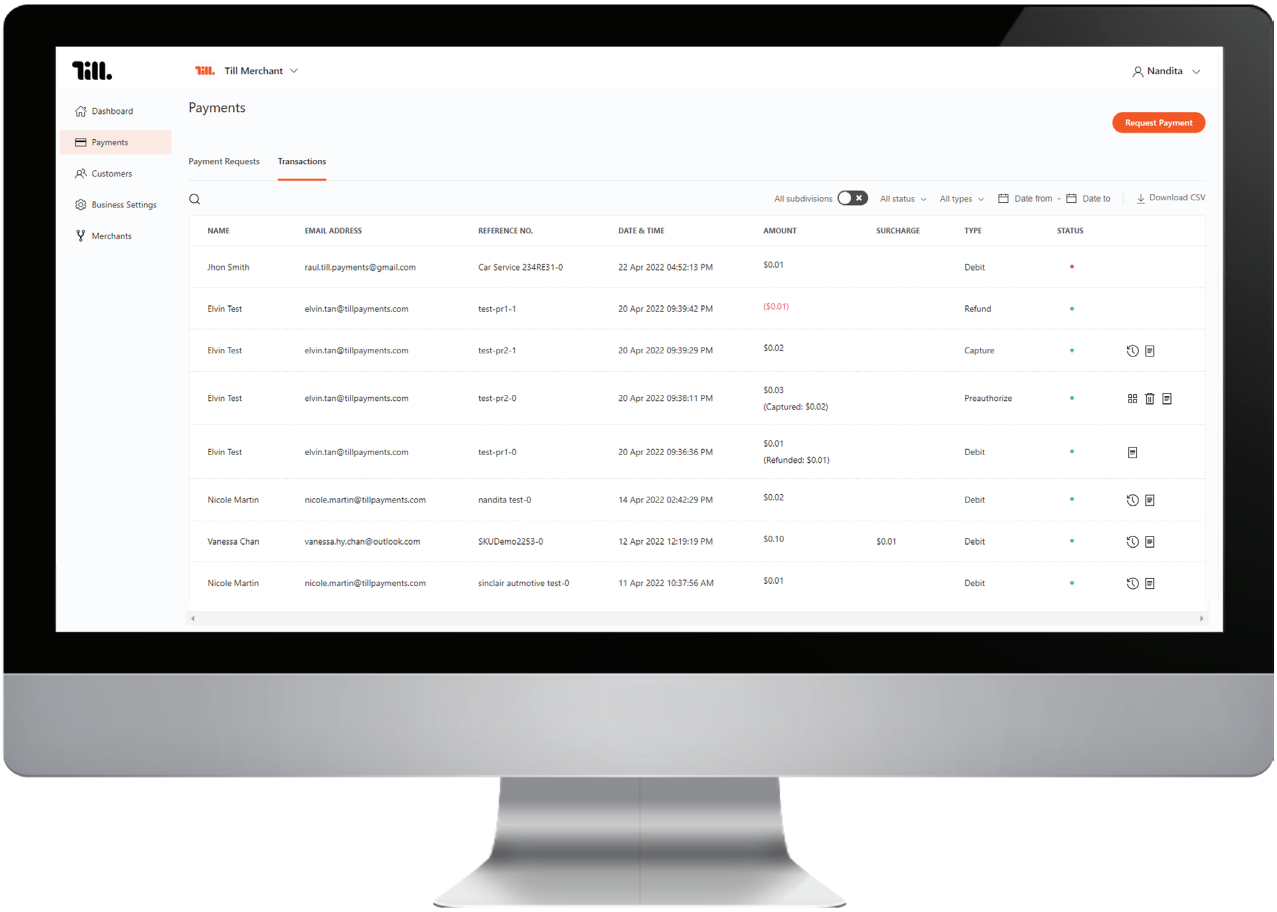


- **Internet icon:** This icon allows you to copy the URL of the payment request so you can provide your customers the payment link through your own channels, i.e., through your own emails or texts.
- **Arrow icon:** This icon allows you to download the customer invoice.
- **Bell icon:** If you select 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 as shown on the right.



7.2 Transactions

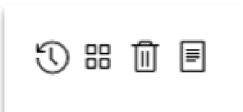
Upon selecting the “Transactions” tab, you will see the screen below:



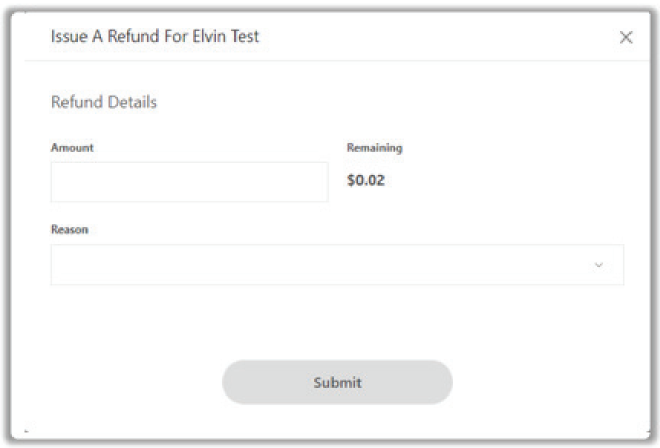
It displays transactions, and can also be filtered by status, type and dates using the dropdown menus on the top right.

Icons

Within the Transaction screen, you’ll see a couple of icons that have different functionality.

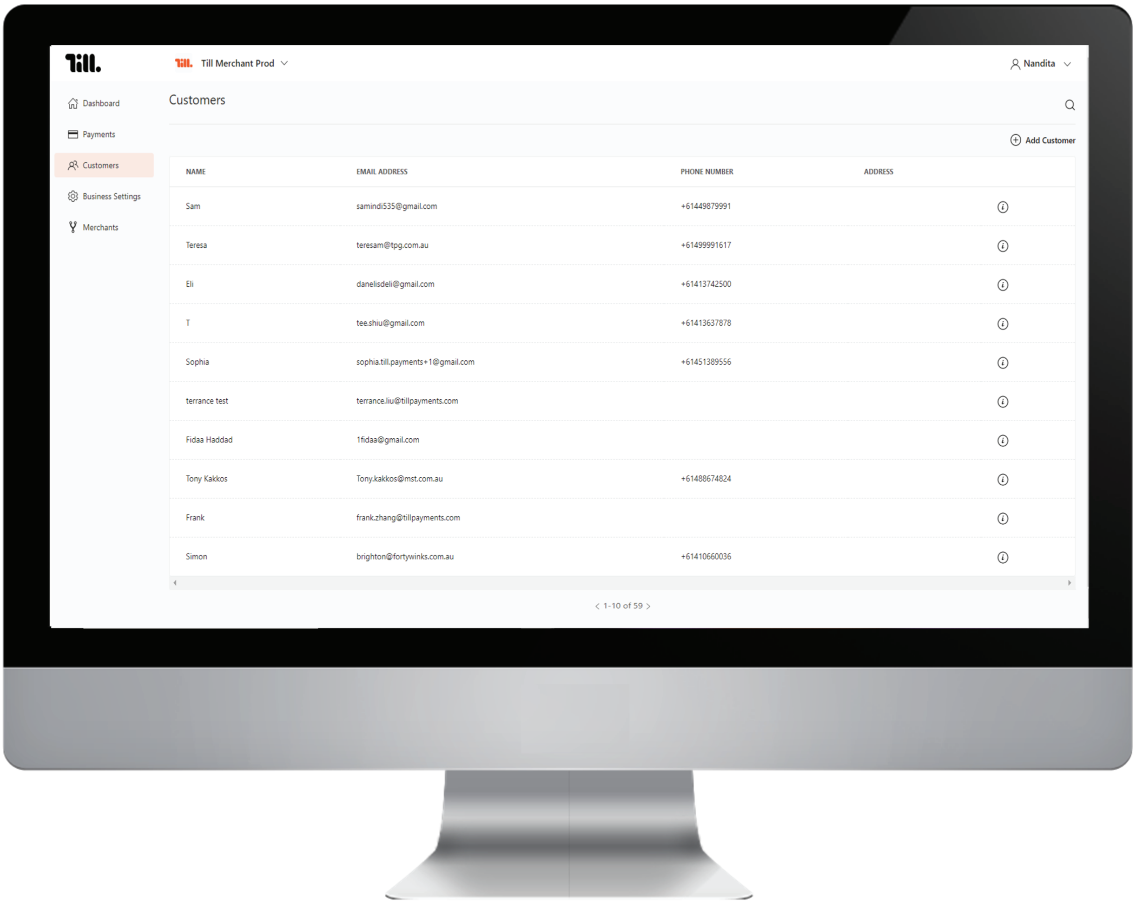


- **Rewind icon:** The rewind icon allows you to refund a specific transaction. It will open this pop up. You can choose the amount to refund, and select a reason why.
- **Square icon:** This icon allows you to capture the funds of a pre-authorization transaction.
- **Receipt icon:** The receipt icon allows you to download a receipt for the transaction.
- **Trash icon:** This icon will allow you to void that specific transaction.



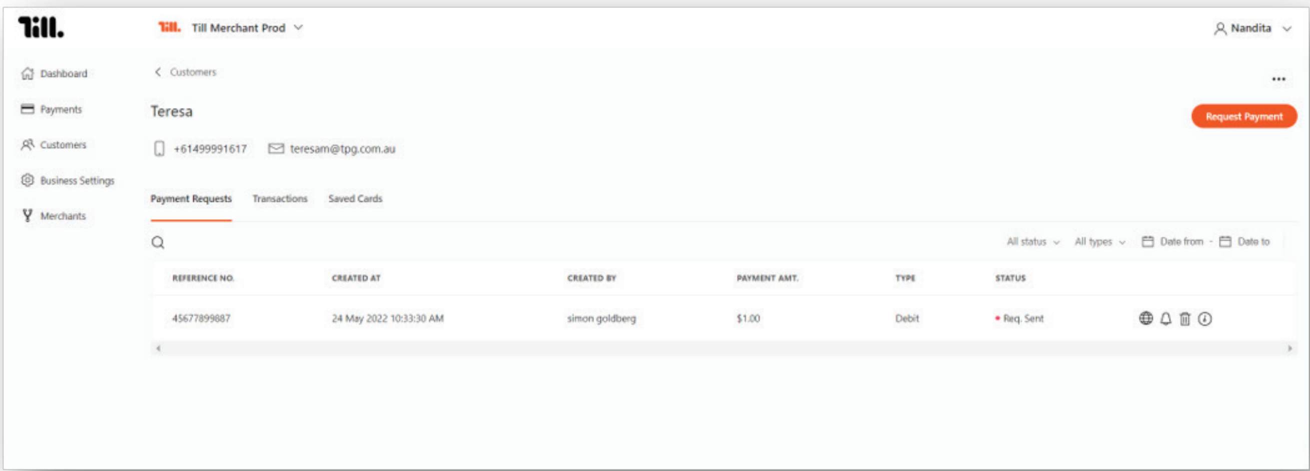
08 Customers

Upon selecting the “Customers” tab, you will see the screen below:



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

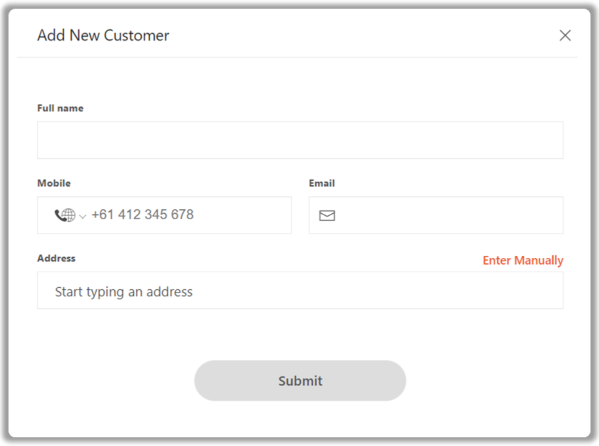
If you select the information icon on the far right, it will display the customers information.



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

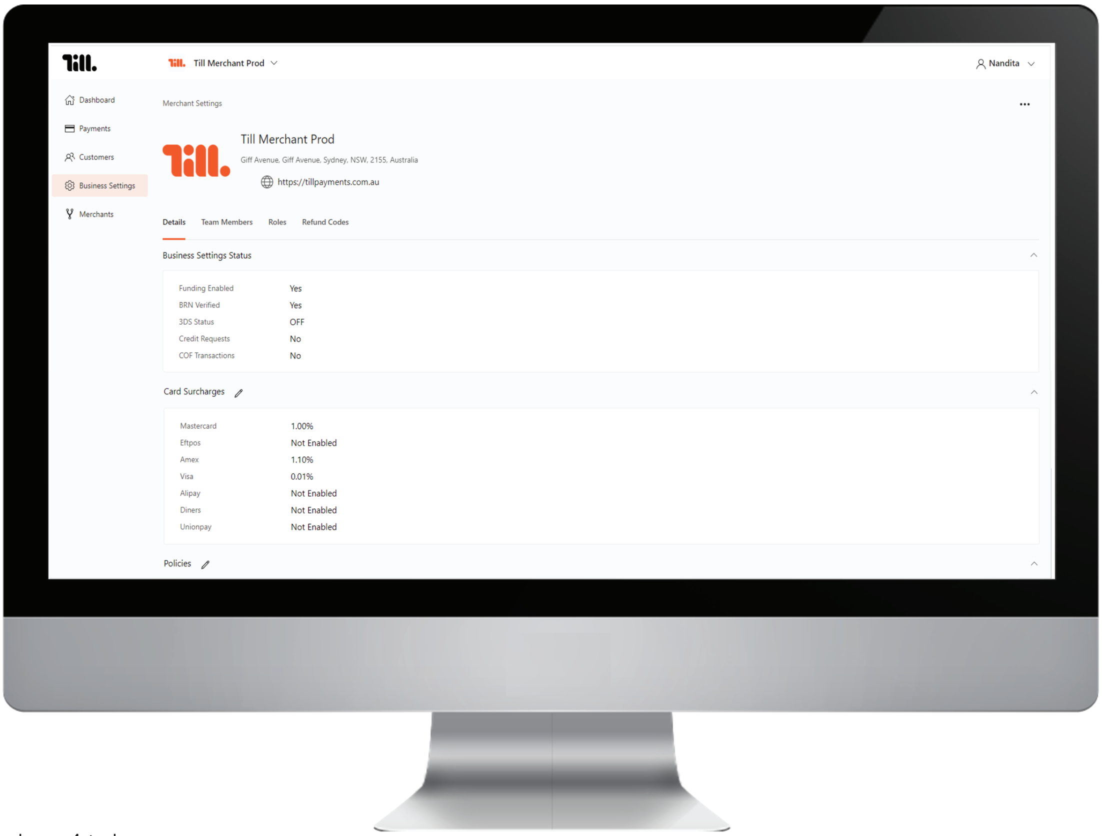
8.1 Adding a new customer

When you select "Add Customer" you will see the pop-up below which enables you to add a new customer:



09 Business settings

When you navigate to the "Business Settings" tab, you will see this screen:



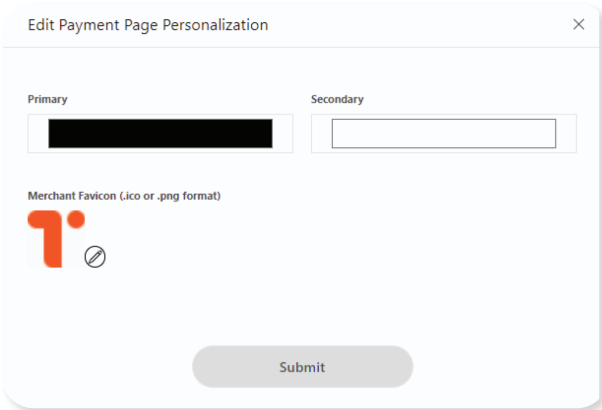
This page has 4 tabs

- Details
- Team Members
- Roles
- Refund Codes

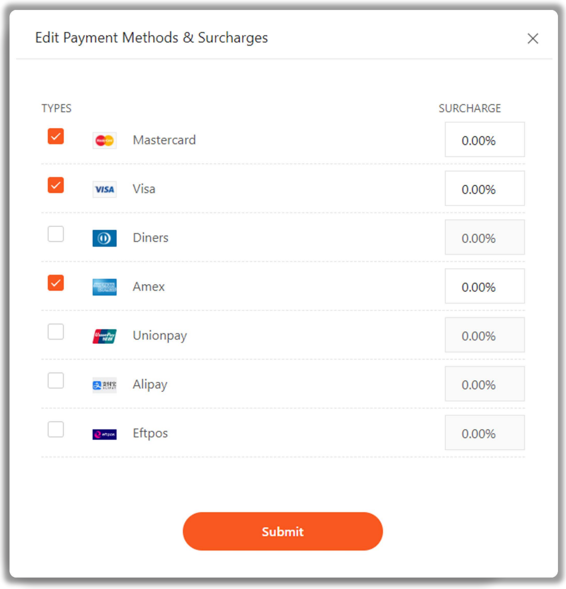
9.1 Details

On the details page, you can view and update business settings status, credit requests, edit policies, edit surcharge percentages to 0%, and personalize your payment page. If other payment methods are needed, please contact Till Support on 347 991 5997 or email us at us-support@tillpayments.com.

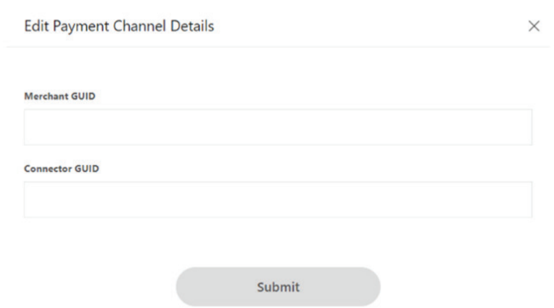
Personalize your payment page



Edit card surcharges to 0%

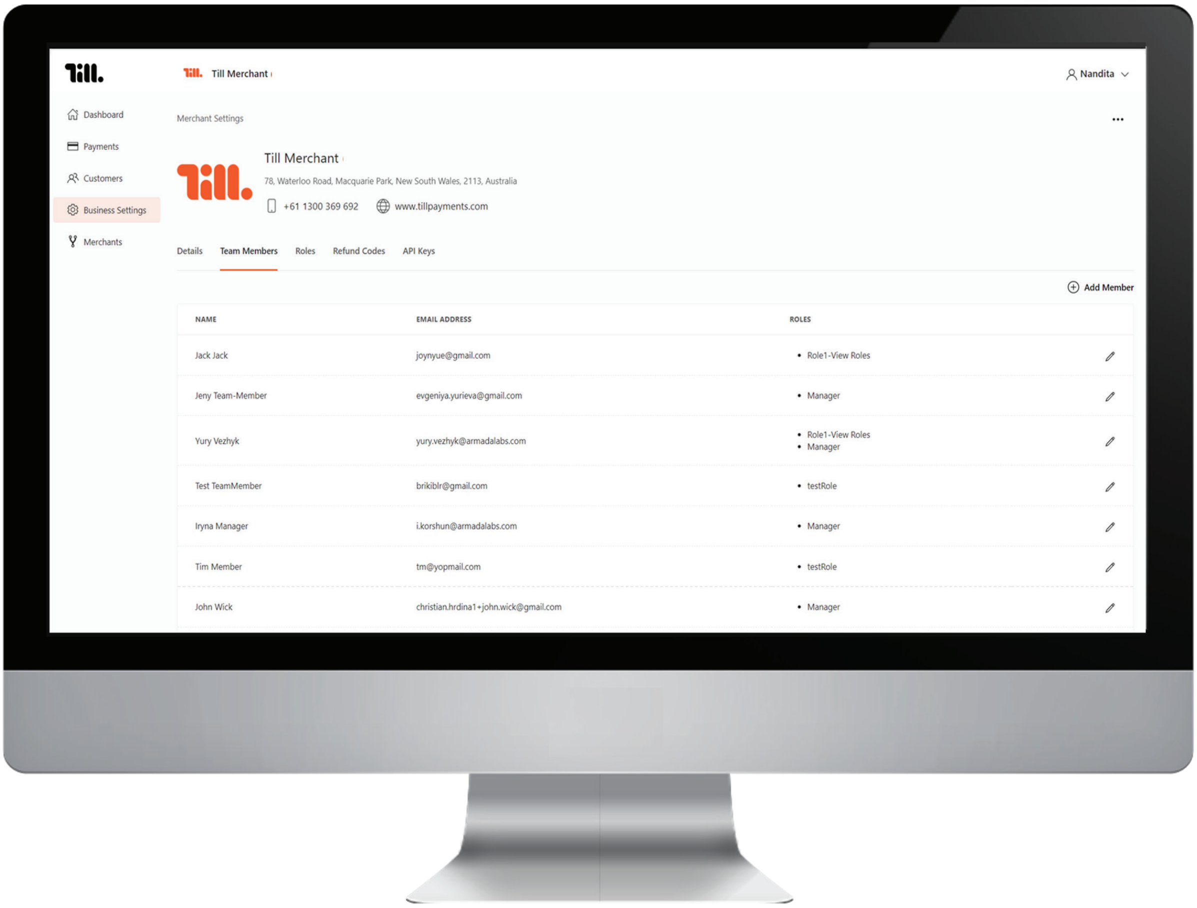


Business settings status



9.2 Team members

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

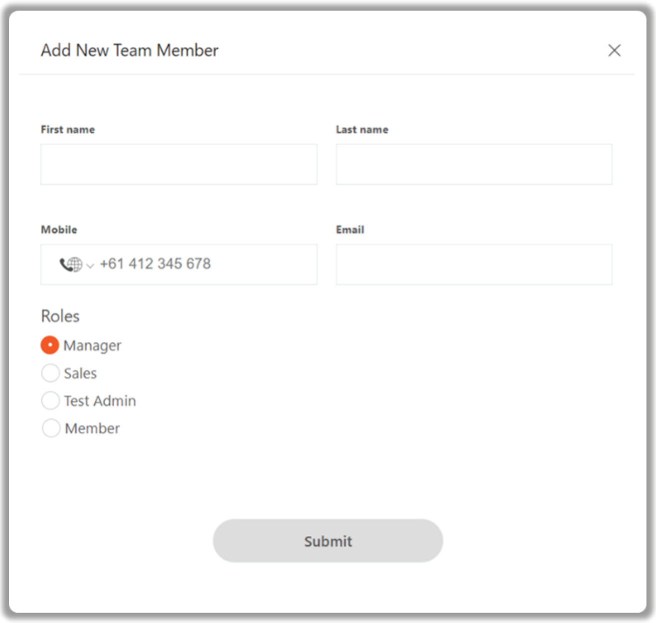


To add a new team member, select the "Add Member" button on the top right.

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.

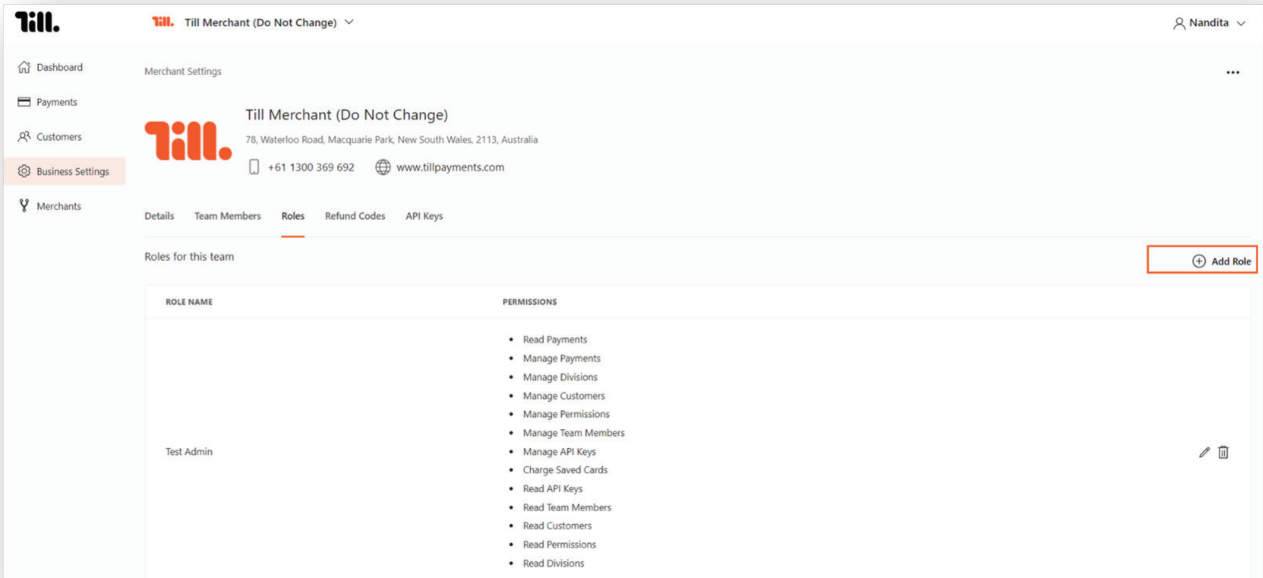
Change the phone number format (Select US) in drop down.



9.3 Roles

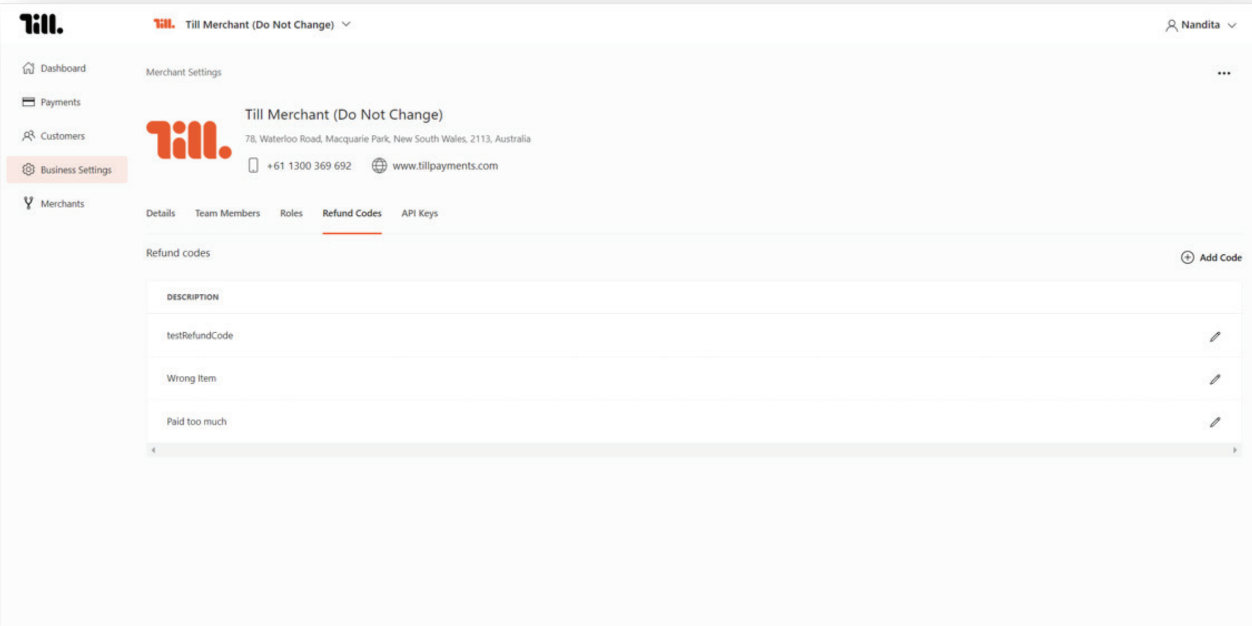
On the Roles tab, you can edit the permissions for existing roles, or delete a role entirely. You can also add a new role.

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.

Need a bit of help?
Contact us

Call **347 991 5997**

Email us at **us-support@tillpayments.com**

Our dedicated team of experts can assist you over the phone 24/7 with questions, problem resolution and extra training. Keep your merchant ID number handy when you call, this will help speed up your enquiry.

For online reports and statements please visit **merchant.tillpayments.com**