



# Payment Link

---

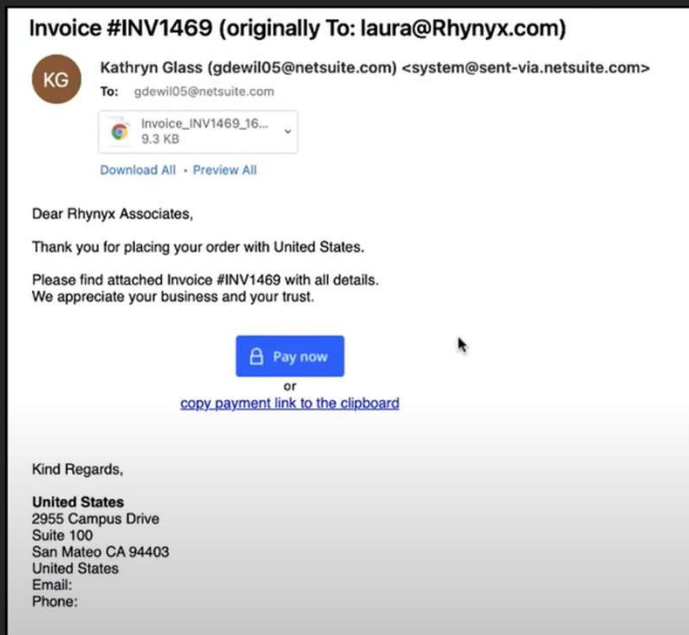
BY CORY ANDERSON CONSULTING



CAC

---

# What is Payment Link?



The Payment Link feature allows your customers to conveniently pay an invoice online, using a computer or mobile device. Instead of having to contact you and discuss payment, your customers can receive an email of the invoice with a link to the payment page. They can choose which method they want to use to pay, including ACH, credit cards, and PayPal, from a list you have selected.



# Features

---

- ❖ Add a link to Invoices that are sent to your customers
- ❖ Allow partial payments
- ❖ Include company logo and info on payments page
- ❖ Customize email templates used to inform customers of accepted or rejected payments
- ❖ Use a link or QR code in an email
- ❖ On the Payment Link Checkout page, a customer can review the invoice, choose a payment method, and submit payment

# Prerequisites

---

- ❖ Enable Payment Instruments
  - ❖ Setup > Company > Enable Features > Transactions > Payment Processing
- ❖ Allow online credit card payments
- ❖ Set up one or more payment methods
- ❖ Set up and assign payment processing profiles for each credit card gateway you want to use
- ❖ Set up DomainKeys Identified Mail (DKIM) to authenticate emails from your account

# Credit Card Processors

---

❖ Check out this article for an in-depth discussion on credit card processors that integrate with NetSuite:

❖ <https://timblairwhite.com/netsuite-credit-card-processing/>

❖ Processors will have setup fees and recurring monthly gateway fees in addition to per transaction fees

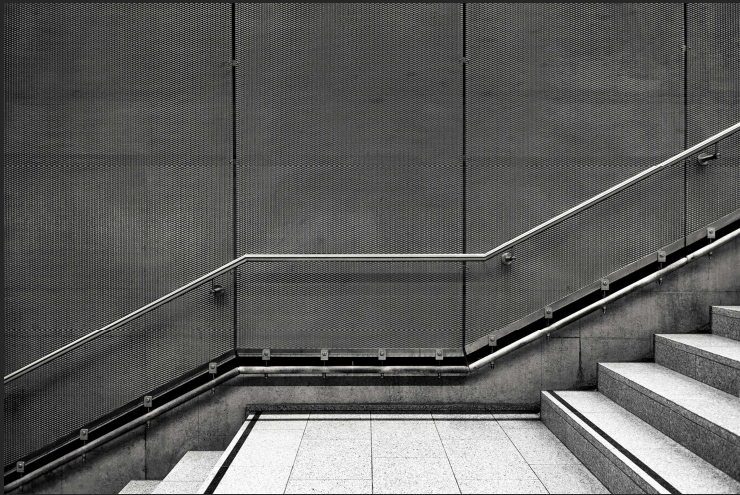


# ACH and PayPal

---

- ❖ ACH - you must use 'Versapay's Solupay for NetSuite SuitePayments'
  - ❖ Information available in SuiteApps
- ❖ PayPal – must use PayFlow Pro

# Setup Steps



## 4 Steps to use Payment Link:

1. Enable Payment Link in Company Preferences
2. Configure Payment Link
3. Customize Payment Link Email Templates
4. Set Up Payment Link Invoice Templates

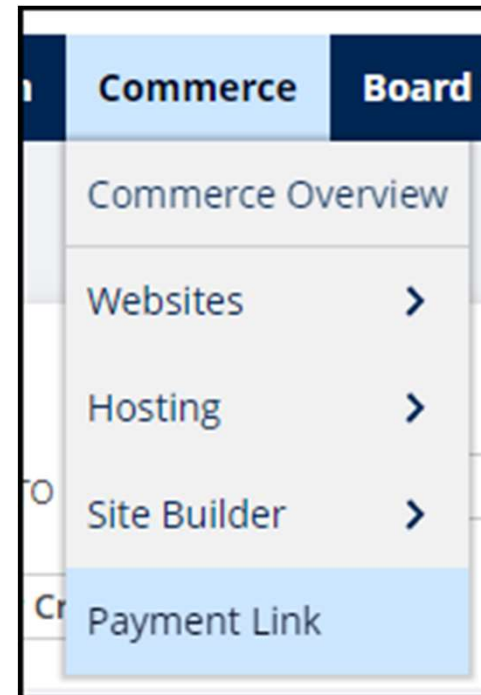
# Setup

---

## ENABLE PAYMENT LINK FEATURE

Setup > Company > Enable Features >  
Transactions

Once enabled, there will be a Payment Link  
configuration option under Commerce





# Setup

## CONFIGURE PAYMENT LINK

Go to Commerce > Payment Link

### Payment Link Setup

[Save](#) [Cancel](#) [Preview](#)

#### Payment Link Checkout URL

DOMAIN PREFIX \*

rmnsug .suitepayments.com/paymentlink/

#### Payment Link Checkout Page

PAYMENT METHODS \*

- ☒ American Express
- ☒ Discover
- ☒ Master Card
- ☒ VISA

If you didn't find preferable Payment Method, check the Payment Method Settings

☒ ACCEPT PARTIAL PAYMENTS

COMPANY LOGO

Start typing for searching

#### Email Templates

PAYMENT ACCEPTED \*

Standard Payment Link Payment Confirmation

PAYMENT REJECTED \*

Standard Payment Link Payment Declined Notifica...

[Save](#) [Cancel](#) [Preview](#)

# Setup

## CUSTOMIZE PAYMENT LINK EMAIL TEMPLATES

Setup > Company > System Email Templates

1. Payment Confirmation
2. Payment Declined Notification

The screenshot shows the 'Templates' interface with tabs for 'Templates', 'Restrict Access', and 'Categories'. The 'English (US)' language is selected. The 'SUBJECT' field contains 'Payment Accepted'. The 'Create Template From' section has 'FILE' selected. The 'TEXT EDITOR' is active, showing a rich text editor with a toolbar. The editor content includes a salutation, a thank you message, and a 'Payment Information' table with fields for Date, Amount, Invoice, Invoice Amount, and Invoice Date, each with a corresponding data field.

Payment Information:	
Date:	<code>\${transaction.trandate}</code>
Amount:	<code>\${transaction.total?string[number_format]} \${transaction.currencysymbol}</code>
Invoice:	<code>\${transaction.apply[0].refnum}</code>
Invoice Amount:	<code>\${transaction.apply[0].total?string[number_format]} \${transaction.currencysymbol}</code>
Invoice Date:	<code>\${transaction.apply[0].applydate}</code>

# Setup

---

## SETUP INVOICE TEMPLATES

- ❖ Decide whether to send the invoice as HTML in the body of the email message, or attached to the email as a PDF.
  - ❖ To set this preference, in NetSuite go to Home > Set Preferences > Transactions > Printing, and choose HTML or PDF for the Transaction Email Attachment Format field.
- ❖ Enable Advanced PDF/HTML Templates.
  - ❖ To enable this feature, in NetSuite go to Setup > Company > Enable Features > SuiteCloud > SuiteBuilder, and check the box for the Advanced PDF/HTML Templates field.


## CONFIGURE INVOICE FORM


Customization > Forms > Transaction Forms

1. Select 'Printing Type = Advanced'
2. Select the Payment Link templates for Print and Email templates

## Invoice Email with Payment Link

**Invoice #INV1469 (originally To: laura@Rhynyx.com)**

 Kathryn Glass (gdewil05@netsuite.com) <system@sent-via.netsuite.com>  
To: gdewil05@netsuite.com

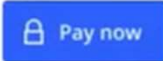
 Invoice\_INV1469\_16...  
9.3 KB

[Download All](#) • [Preview All](#)

Dear Rhynyx Associates,

Thank you for placing your order with United States.

Please find attached Invoice #INV1469 with all details.  
We appreciate your business and your trust.

 Pay now

or

[copy payment link to the clipboard](#)

Kind Regards,

**United States**  
2955 Campus Drive  
Suite 100  
San Mateo CA 94403  
United States  
Email:  
Phone:

## Invoice with Payment Link QR Code

**ORACLE  
NETSUITE**

**United States**  
2955 Campus Drive  
Suite 100  
San Mateo CA 94403  
United States

**Invoice #INV1469**

Date: 11/23/2021  
Due Date: 12/23/2021  
Terms: Net 30

**Total**  
**USD 132.78**



Pay with the QR code, or click this [secure link](#).  
You can also copy the link to clipboard.

**Bill To:**  
**Rhynyx Associates**  
80 Acres  
Pasadena CA 90042  
United States

**Ship To:**  
80 Acres  
Pasadena CA 90042  
United States

Item	Description	Quantity	Rate	Amount
Industrial Belt-16 ft Len-3/8 Inch Thick-2 inch Width Industrial Belt	Industrial Belt	1	120.00	120.00
Subtotal				120.00
Shipping Cost				12.78
Tax Total				0.00
<b>Total</b>				<b>USD 132.78</b>

## Invoice Payment Screen

### Payment Link Demo


#### Payment

**Payment Amount**


**\$132.78**

[Pay other amount](#)


**Select payment method**




**Discover**  
Payment Card



**Master Card**  
Payment Card



**VISA**  
Payment Card



**American Express**  
Payment Card

#### Summary

**Invoice #INV1469**  
Invoice Date: 11/23/21  
Due Date: 12/23/21

**Bill To**  
80 Acres  
Pasadena, CA 90042  
US


**Amount Due**

**\$132.78**

**Status**  
**Open**

**Terms**  
**Net 30**  
(active)

Item	Quantity	Amount
Industrial Belt	1	120.00
Subtotal		120.00
Shipping and handling		12.78
Tax		0.00
<b>Total</b>		<b>\$132.78</b>



Cory Anderson  
Consulting

## Partial Payment Option Enabled

Invoice Date: 11/22/21

✕

Original Amount	132.78
Amount Due	132.78
Payment Amount	<div>USD <input type="text" value="132.78"/></div>

Save

## Payment Complete

### Payment Link Demo

#### Payment



**Thank you!**

Your payment has been successful

You will receive an email with your payment confirmation.

#### Summary

**Invoice #INV1469**

Invoice Date: 11/23/21

Due Date: 12/23/21

**Amount Due**

**\$0.00**

**Bill To**

80 Acres

Pasadena, CA 90042

US

**Status**

**Paid In Full**

**Terms**

**Net 30**

(active)

#### > Payment History

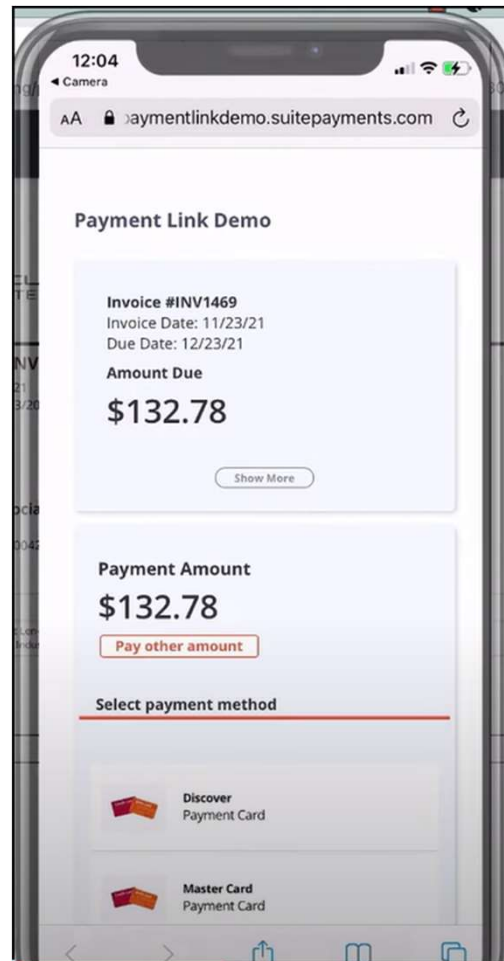
Item	Quantity	Amount
Industrial Belt	1	120.00
Subtotal		120.00
Shipping and handling		12.78
Tax		0.00
<b>Total</b>		<b>\$132.78</b>



Cory Anderson  
Consulting



## Mobile View of Payment Screen



# Thank you!



[www.coryandersonconsulting.com](http://www.coryandersonconsulting.com)

2022.1  
New Release  
Highlights

**ORACLE®**  
**NETSUITE**

# Customer-Scheduled Maintenance



Over the course of this release, some customers whose production accounts are located in NetSuite data centers built on Oracle Cloud Infrastructure (OCI) will be able to upgrade to NetSuite 2022.1 using the Customer-Scheduled Maintenance feature.

Administrators whose NetSuite accounts are selected to use this new feature will receive email notifications with the necessary instructions.

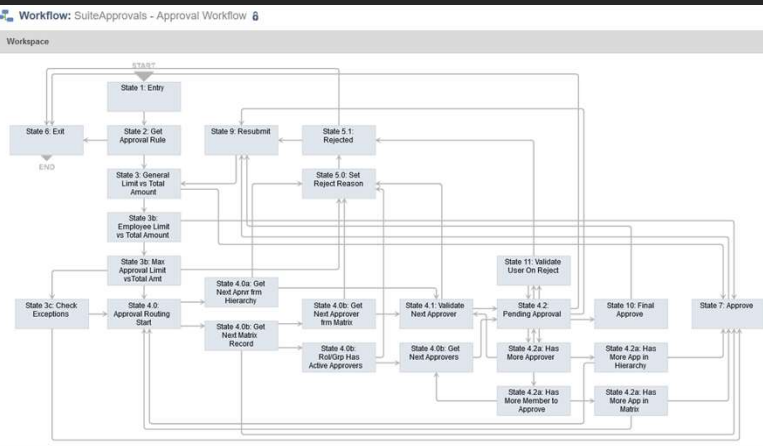
# SuiteApprovals Enhancements

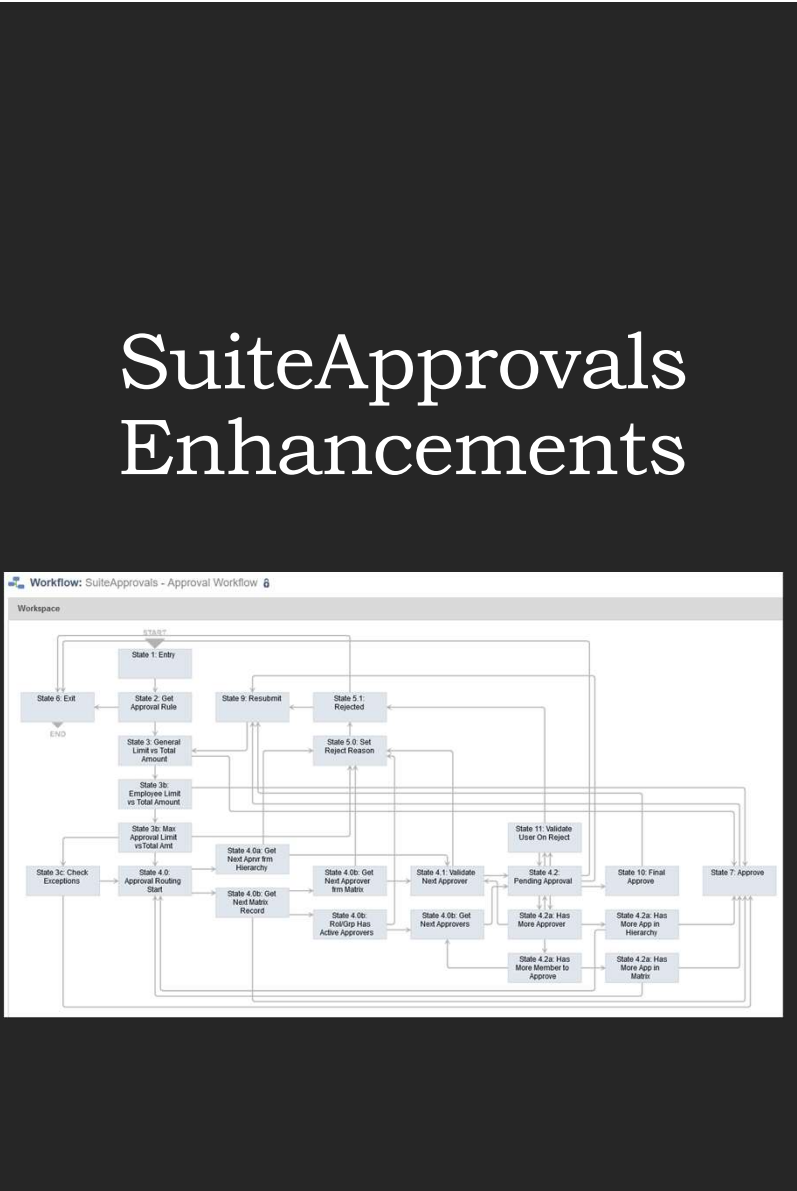
## Record Locking and Reapproval

The Approval Rule page and Approval Rule assistant now include a new section, **Set Up Locking and Reapproval**. This section includes the following capabilities:

- **Record locking based on approval status** – When creating approval rules, you have the following record locking options:
  - Lock records in Pending Approval or Approved status, or both.
  - Allow editing of records regardless of approval status.

This capability applies to purchase orders, vendor bills, and expense reports.



[illegible]

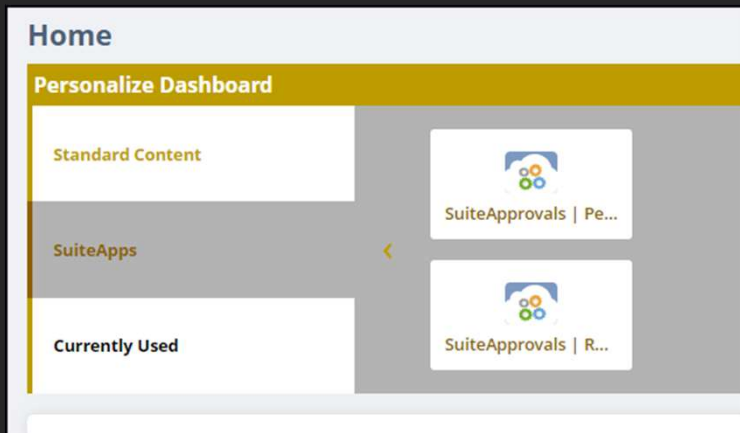
➤ **Setting of percentage or amount tolerance limits** – You can set tolerance limits to control whether records are rerouted for approval. Tolerance limits affect only pending approval and approved records.

The system reroutes records for approval using the same approval rule if the change in the record amounts exceed the set percentage or amount tolerance. You also have the option to disallow rerouting regardless of changes in record amounts.

This capability applies to purchase orders, vendor bills, and expense reports.



# SuiteApprovals Enhancements



## SuiteApprovals Portlets

- **Records for Approval** – Aside from vendor bills, you can now see the number of purchase orders and expense reports for your approval.
  - The portlet lists the records by type and shows how many records you need to approve.
  - The record type name on the portlets links to a page from which you can access the records.
- **SuiteApprovals Reminders** – For vendor bills, purchase orders, and expense reports:
  - The portlet lists the pending approval and rejected records per record type for the whole account. Each status links to a page that shows the list of pending approval and rejected records.
  - You can also review ageing records awaiting approval, and review records that may require reapproval.

# Coastal ACH Deprecation



Coastal ACH has a deprecation date of May 2022. Payments will no longer be transmitted to your vendors or processed from your customers, even if the process appears successful.

Depending on your requirements, consider the following replacements:

- For Accounts Receivable - Payment Acceptance
  - Payment Link - allows the recipient to pay each invoice individually. It is supported by both ACH and credit card payments.
  - SuiteCommerce MyAccount Overview – full-featured account view for your customers. Various payment methods are supported.
- For Accounts Payable - Outbound ACH Payments
  - Consider using the Electronic Bank Payments
  - **Use this in combination with the sFTP Connector SuiteApp to transmit files to your bank securely**



# Electronic Bank Payment Enhancements



## Exclude Transactions from Electronic Payments Processes

You can exclude any invoice and credit memo from electronic payments processing by checking the **Exclude from Electronic Bank Payments Processing** box. This box is available on invoice, credit memo, and sales order records.

## Process Payments for Vendors from Primary and Secondary Banks

Starting 2022.1, you can process payments using primary or secondary entity banks. A new Entity Bank list is added on the EFT subtab for the following transaction types:

- Bills
- Bill Credit
- Bill Payment
- Commission
- Expense Report

# Electronic Bank Payment Enhancements



## **Auto Process Payment File Administration (PFA) Stuck in Queue**

Electronic Bank Payments version 2022.1 includes a new map/reduce script Auto Process Queued PFA, which lets you process PFA stuck in a payment queue. When the script runs, it sets the status of the stuck PFA to failed and automatically processes the next PFA in the queue. You can run the script deployment `customdeploy_15531_auto_queued_pfa_ss` on demand or you can set a schedule for it to run daily.

# sFTP Connector Enhancements



## Inbound Configurations

You can create new inbound configuration records to connect NetSuite to the bank servers and initiate the payment file downloads. You must have an Administrator or SFTP Set Up role to configure the records. For more information, see the help topic [Setting Up Inbound Configuration Records](#).

The inbound configuration of the SFTP Connector SuiteApp enables you to do the following:

- Set up bank server details to download the payment files in a secure manner from the Inbound Configurations page.
- Perform manual download of your payment files from bank server to NetSuite. For more information, see the help topic [Manual Payment File Download](#).
- Schedule an automatic download of your payment files based on your preferred date and time. For more information, see the help topic [Schedule Payment File Download](#).

# Bulk Customer Payments

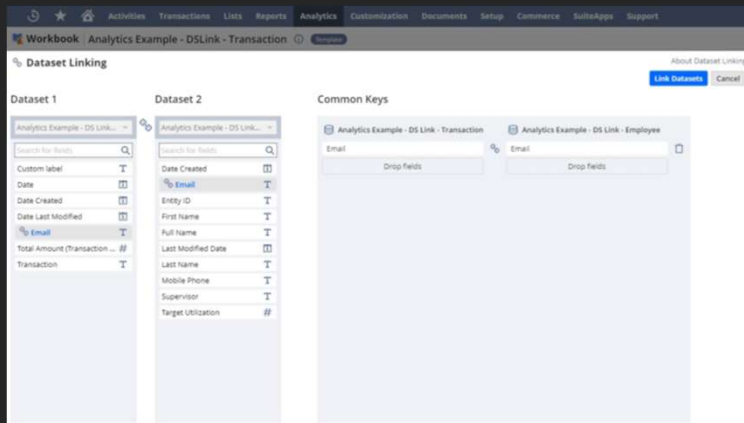


## Create Bulk Customer Payments

You can set up bulk payments by going to Transactions > Bulk Customer Payments > View Bulk Customer Payments > New. On a bulk customer payments record, you can do the following:

- Set the invoice search criteria
- Create a one-time bulk payments run or set a recurring schedule for bulk payments.
- Specify the payment processing profile that you want to use to process transactions in the bulk payments run.
- Set additional accounting options
- Set Default Account and Payment Preferences
- Track Processed Transactions

# SuiteAnalytics Dataset Linking



You can now link two datasets in the Workbook UI. Linking datasets enables you to analyze metrics from two datasets in a single visualization, based on a link that you define using at least one field in each dataset. You can link datasets even if they are based on record types that do not have predefined common keys in the analytics data source, unlike when you join record types in a dataset. Additionally, with linked datasets you can compare data that exists on two different levels of aggregation, like the sum of individual transactions versus a monthly budget.

# File Drag & Drop



## File Drag and Drop Enhancement

In version 2.03.0, the File Drag and Drop SuiteApp is updated to make it compatible with NetSuite 2022.1. After installing this version, **you must clear the browser cache or press Ctrl+F5 for the SuiteApp to work properly.**



# Bonus Tip!

status.netsuite.com

---

NetSuite OpenAir Bronto

Free product tour

ORACLE  
NETSUITE

MAR '21 - FEB '22

438,359,835,881  
APPLICATION REQUESTS

99.98%  
AVG UPTIME



Subscribe to Updates

# Thank you!



[www.coryandersonconsulting.com](http://www.coryandersonconsulting.com)