Paylink Tutorials

23/08/2021

version 1.0

Paylink

Look & Feel	3
Create a Paylink	11
Create a One Page Shop	23
Add Products	32
Activate Taxes	41
Payments	46
Refund	53
Add user	57

easy | nets

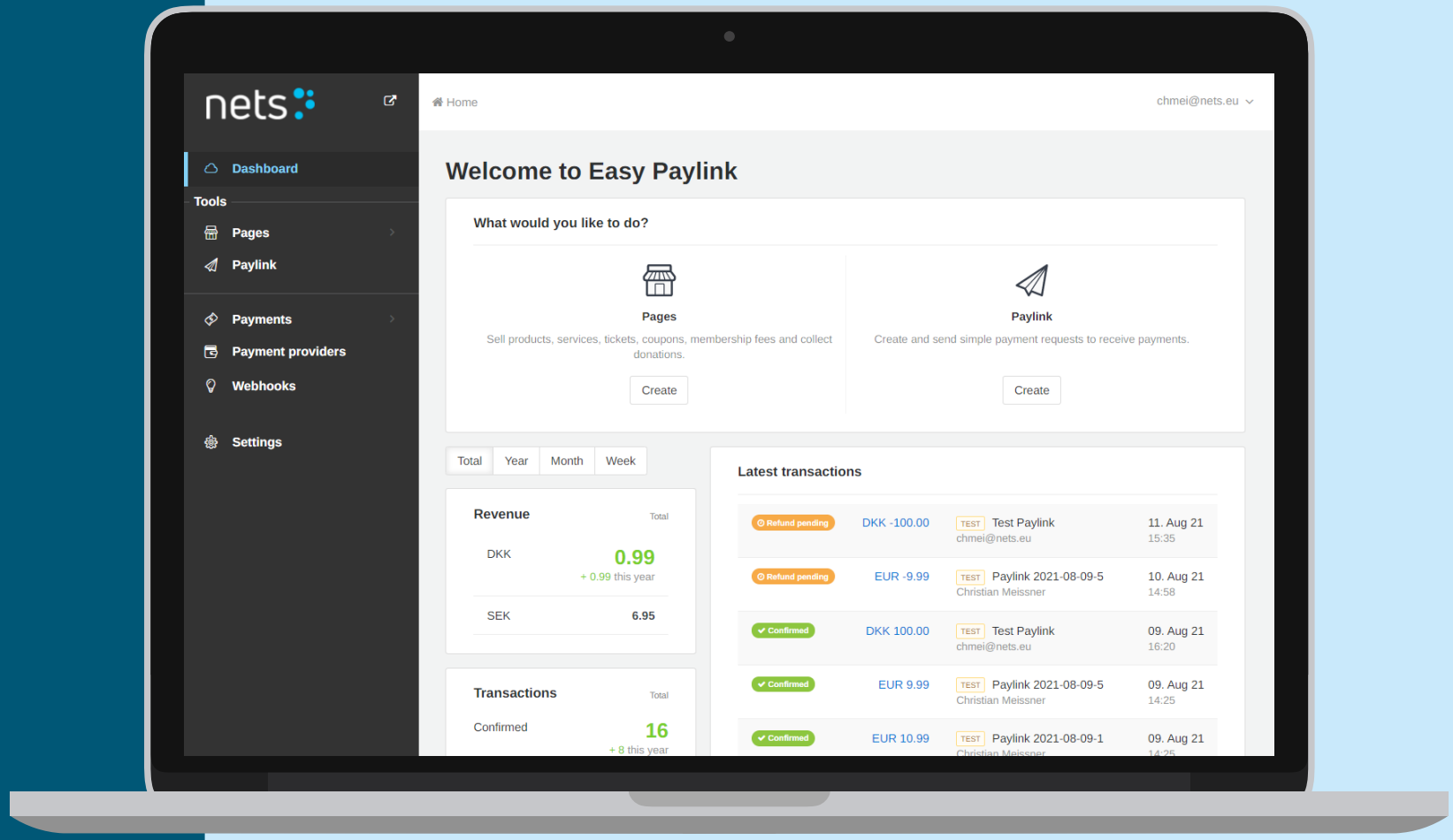
Look & Feel

In this tutorial we show you how to customize the look and feel of your paylink in 7 steps

easy | nets

Look & Feel

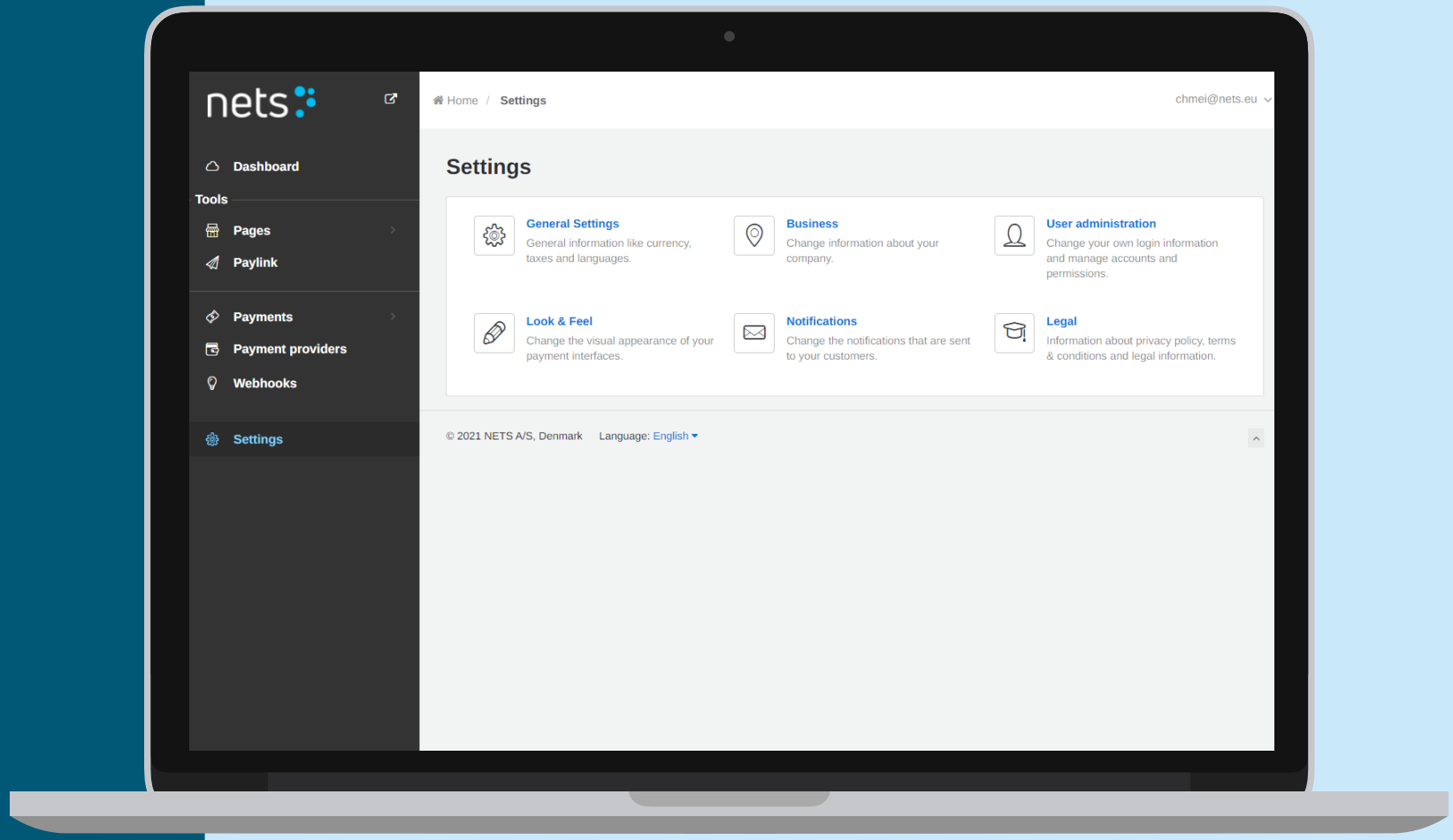
- Click on the „Settings“ tab on the left



easy | nets

Look & Feel

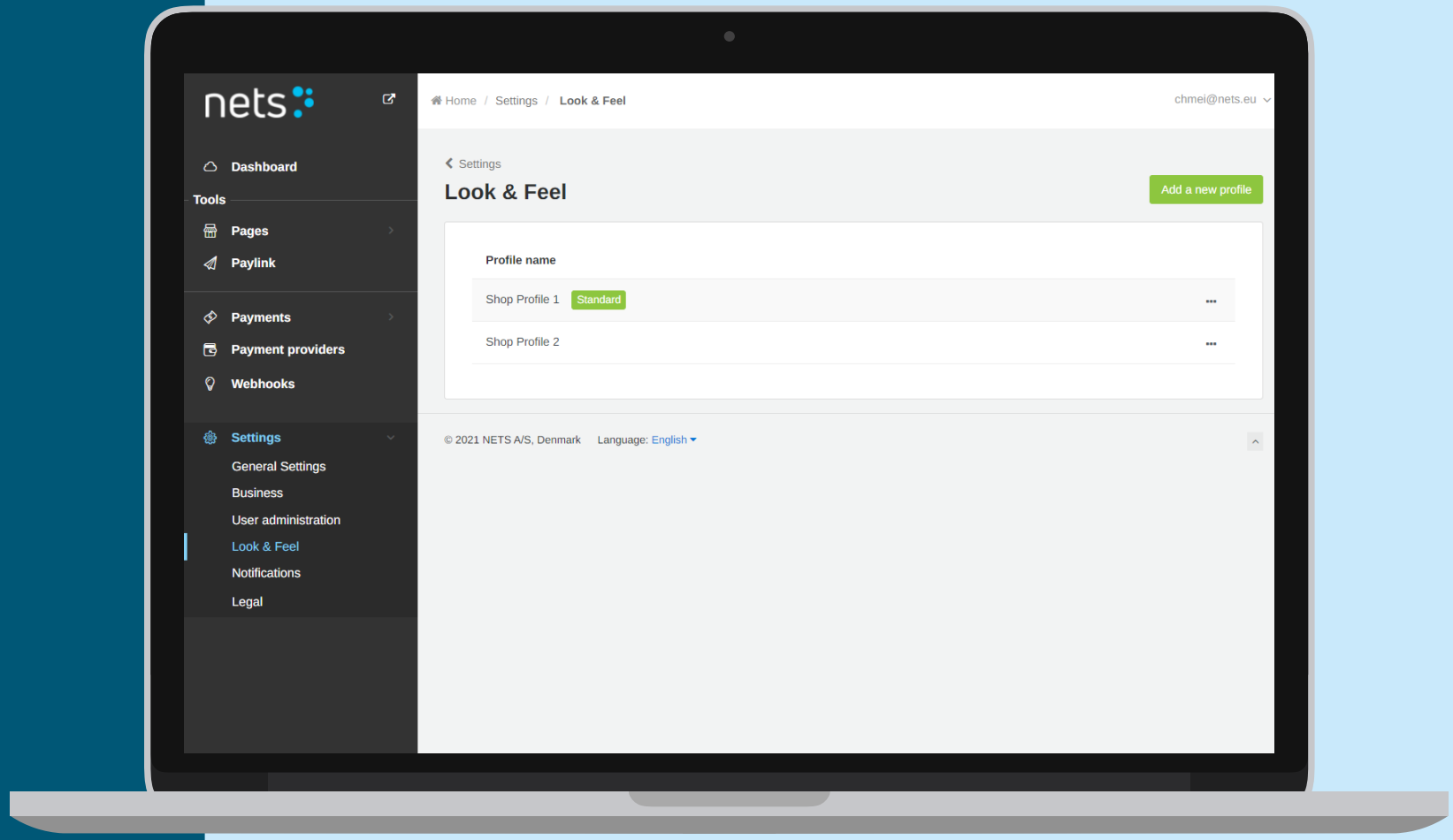
- Click on the „Look & Feel“ menu



easy | nets

Look & Feel

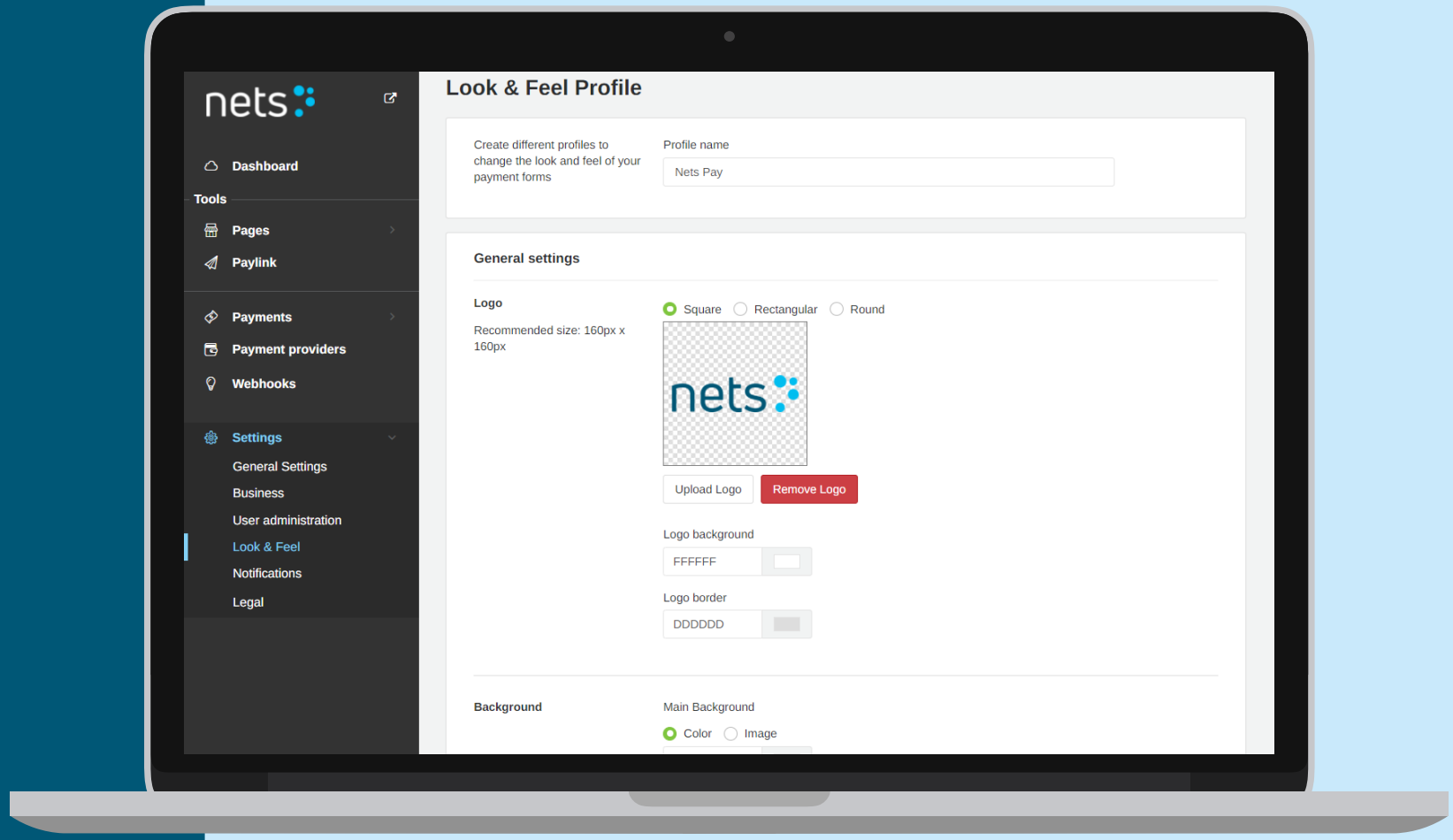
- Click on the green „Add a new profile“-button.



easy | nets

Look & Feel

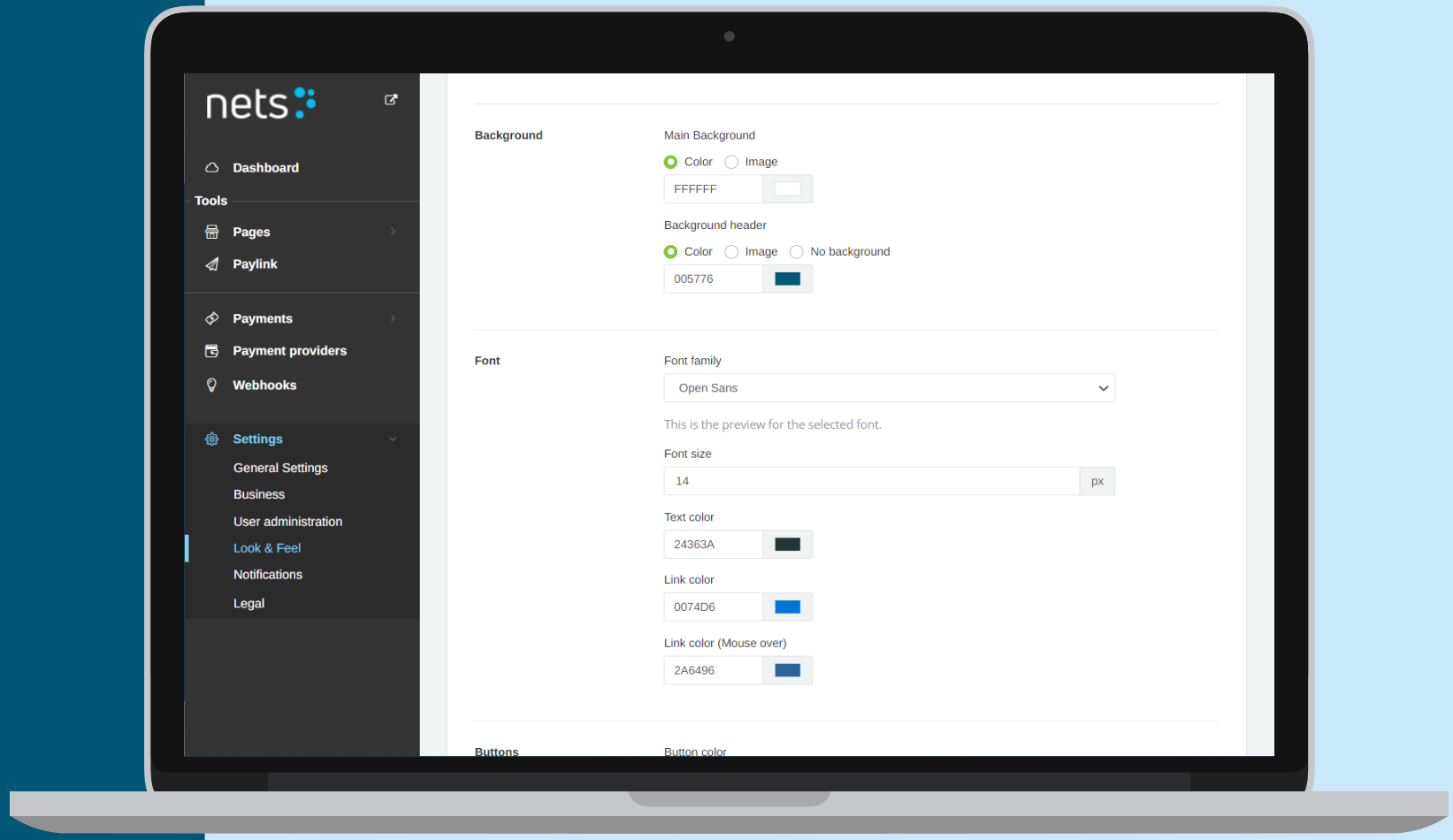
- Enter a profile name. This will be visible only for you in the backend.
- To add a logo, click on the „Upload Logo“ button.
- You can also choose whether your logo should have a square, rectangular or round frame.
- Additionally you can choose the color and the fill color of the frame.



easy | nets

Look & Feel

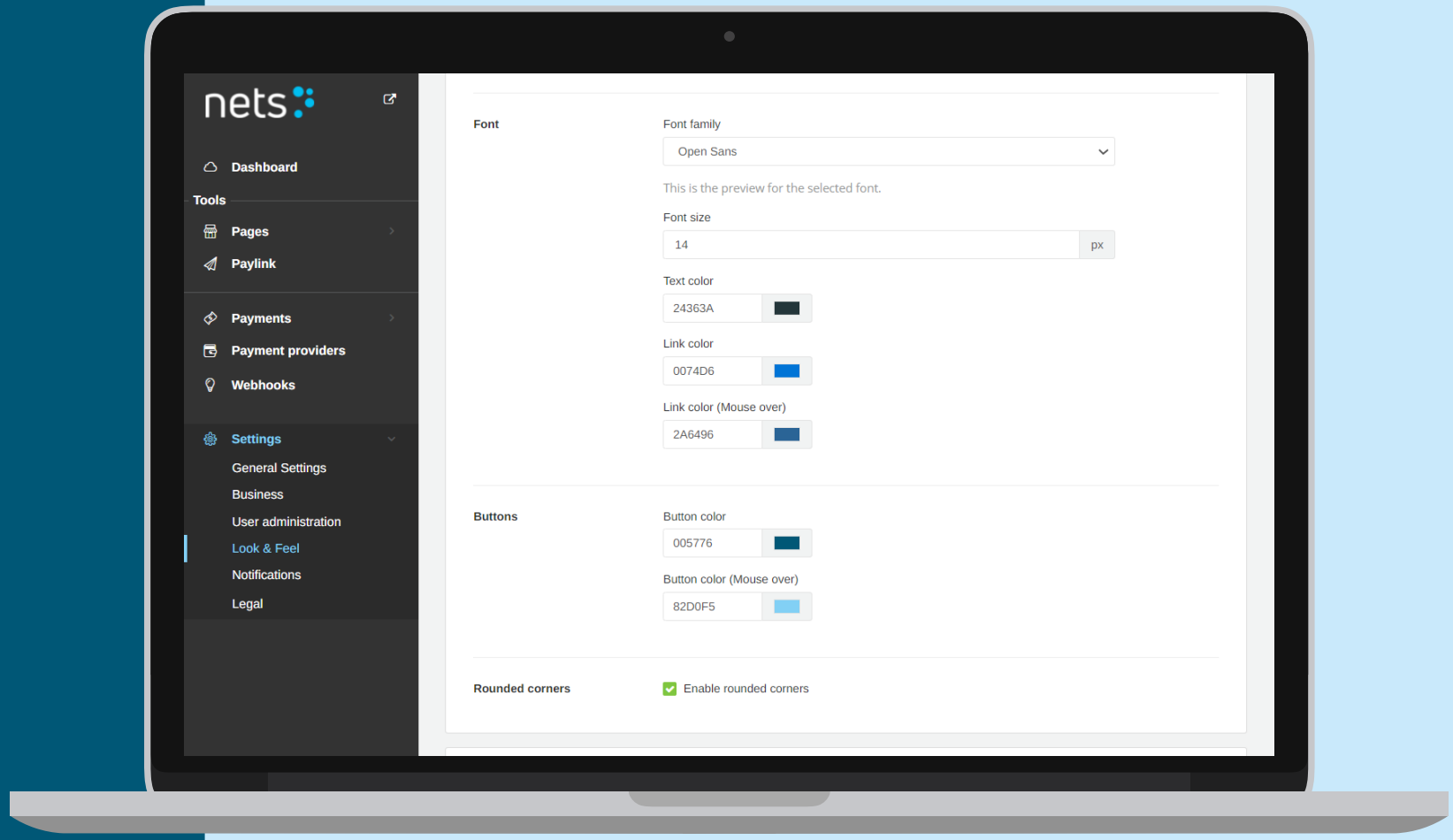
- For the background design you have the choice between a color and an image.
- You have the possibility to create a separate background for the header area.



easy | nets

Look & Feel

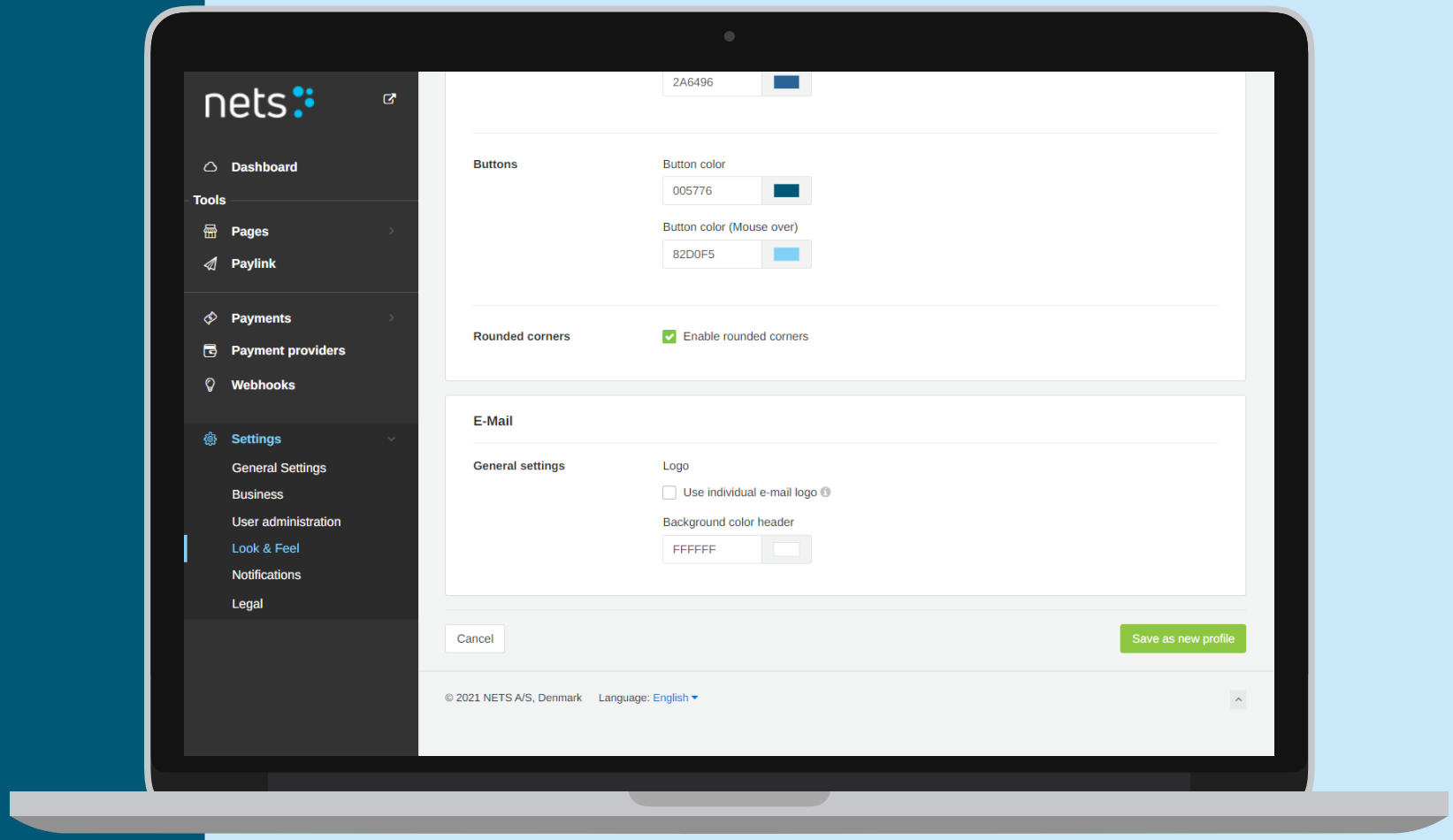
- Select your font, font size and font color. You can define the text color for the terminal separately
- Choose a link and button color. In addition, you can choose the color that the button or link should take on as soon as you move the mouse over it.



easy | nets

Look & Feel

- To save your changes in a new profile click on the green „Save as new profile“ button. If you want to change the current profile click on the green „Update“-button.



easy | nets

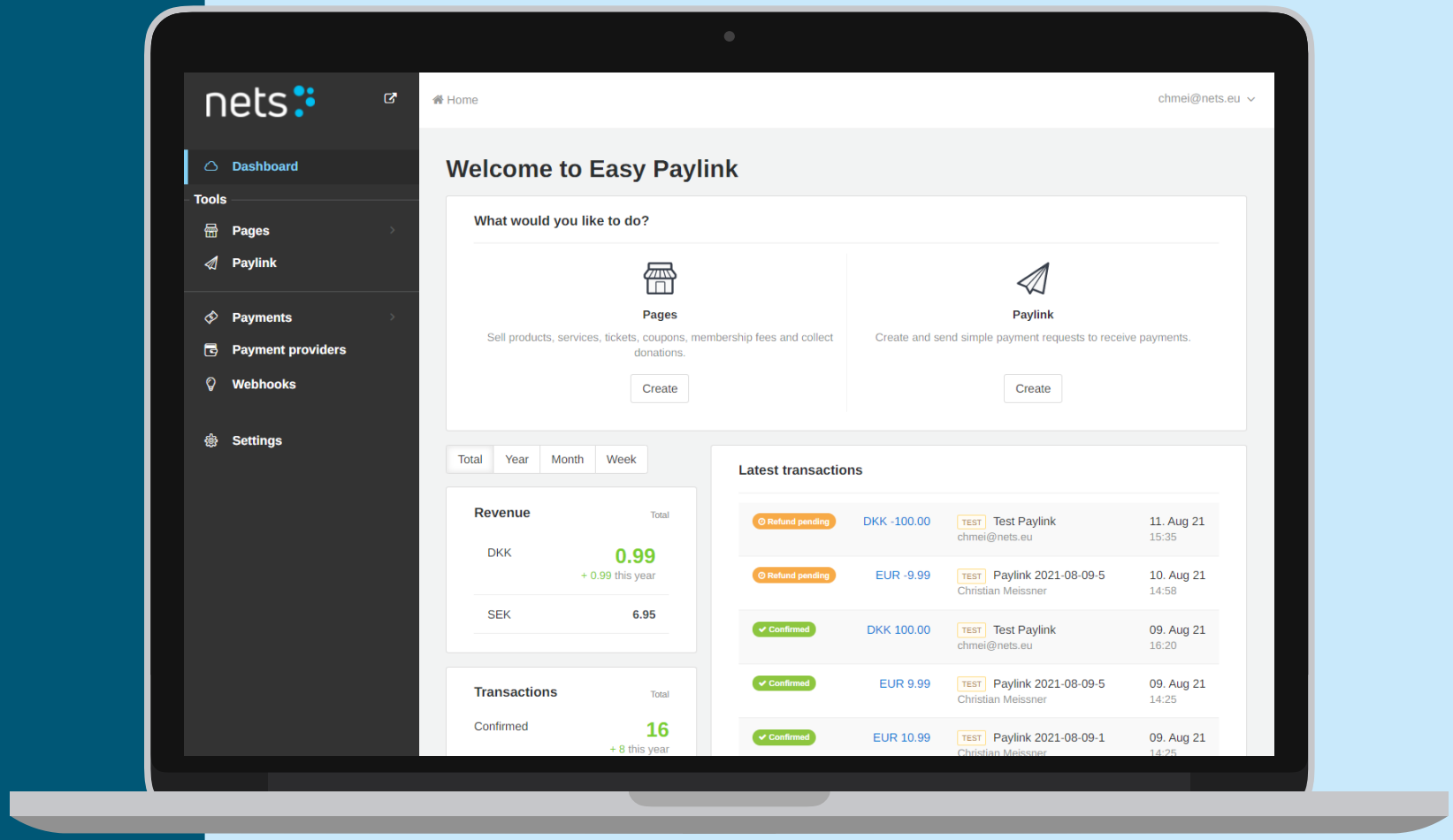
Create a Paylink

In this tutorial we show you how to create a paylink within a few steps.

easy | nets

Create a Paylink

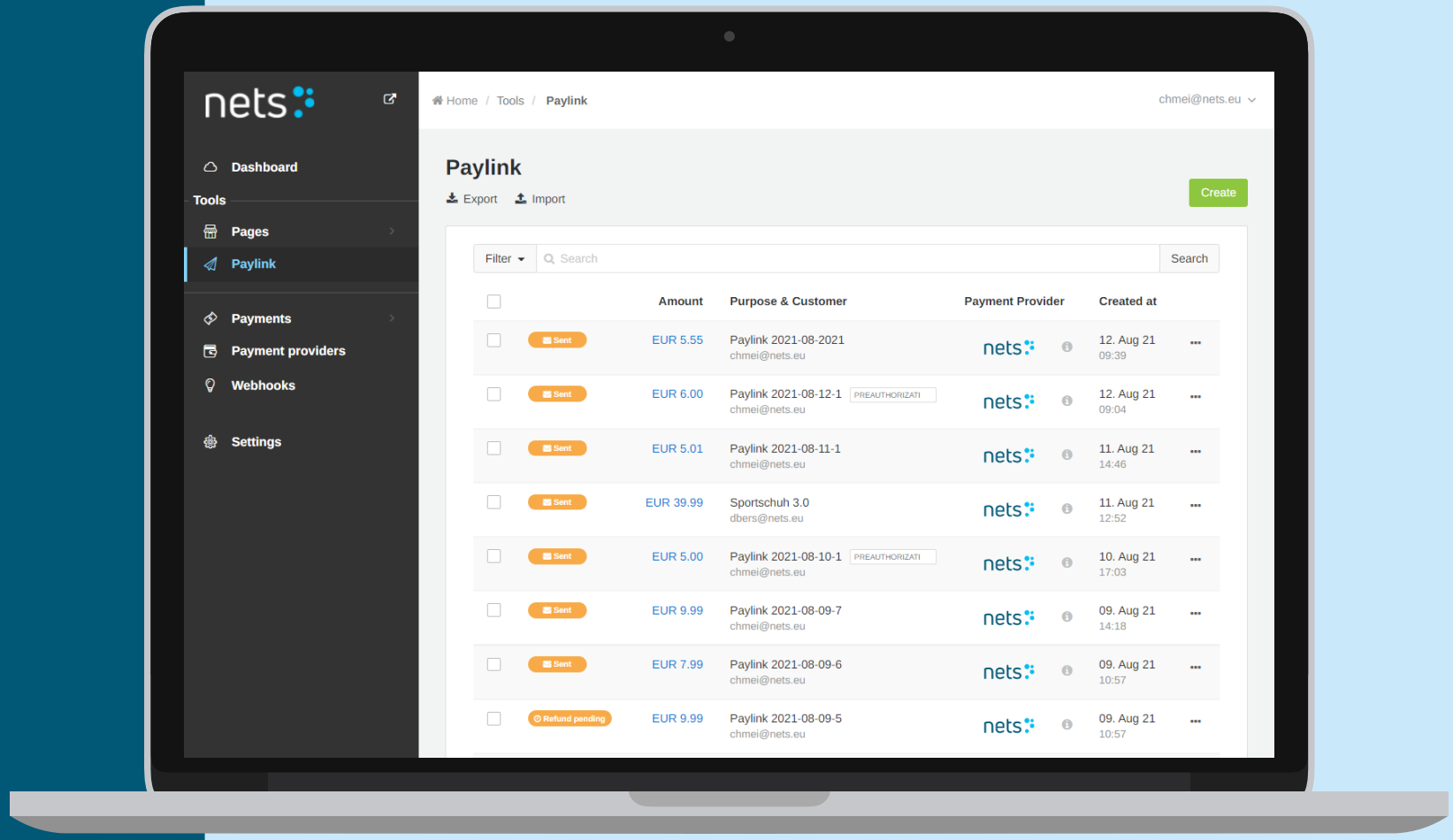
- Click on the „Paylink“ tab on the left.



easy | nets

Create a Paylink

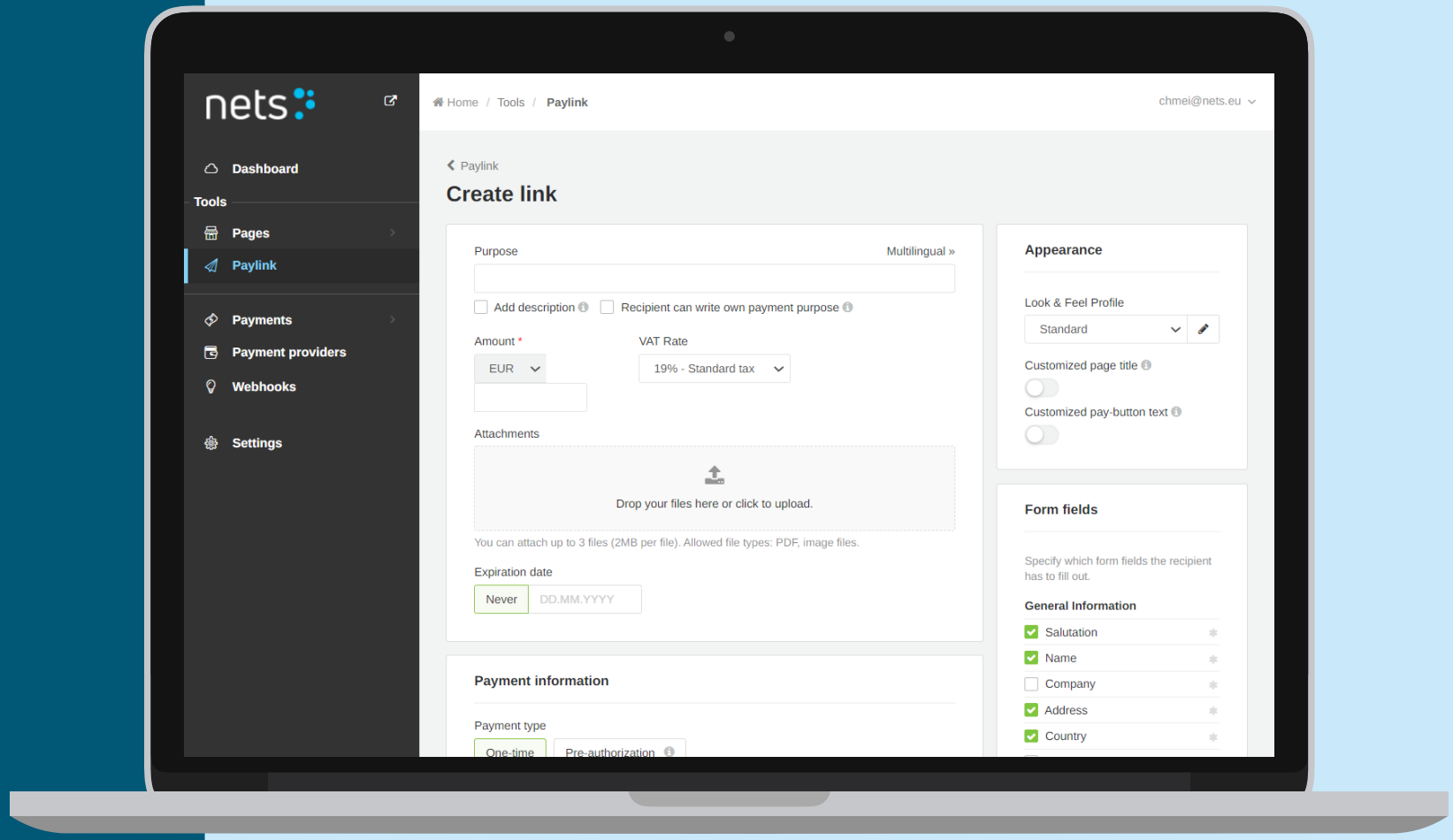
- Afterwards an overview with all existing paylinks will be opened.
- To create a new paylink click on the green „Create“-button



easy | nets

Create a Paylink

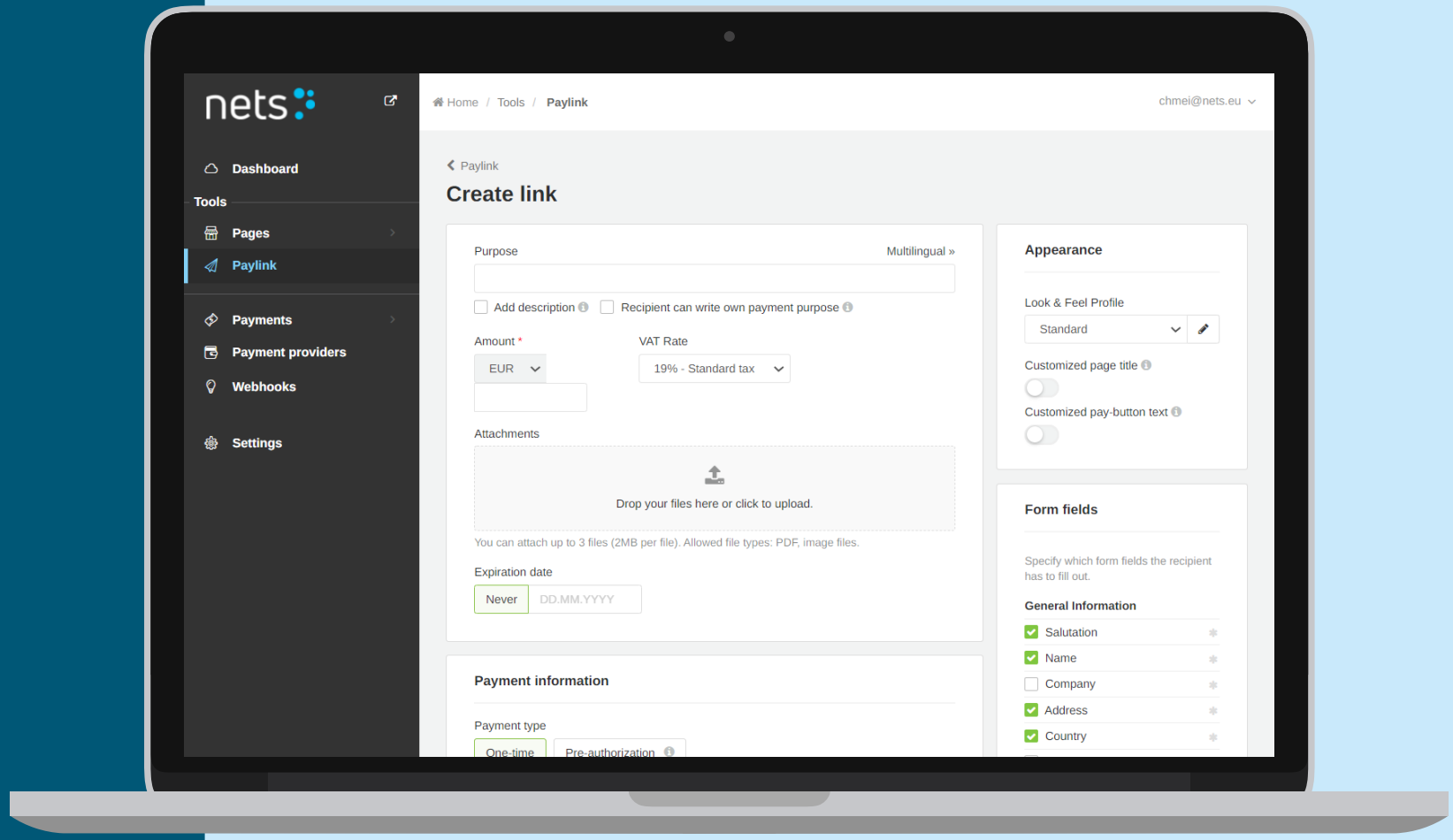
- Define the purpose of your paylink.
- Specify the amount to be paid.
- Choose between a one-time payment or pre-authorization payment.
- Specify the recipient. It is also possible to enter several recipients.



easy | nets

Create a Paylink

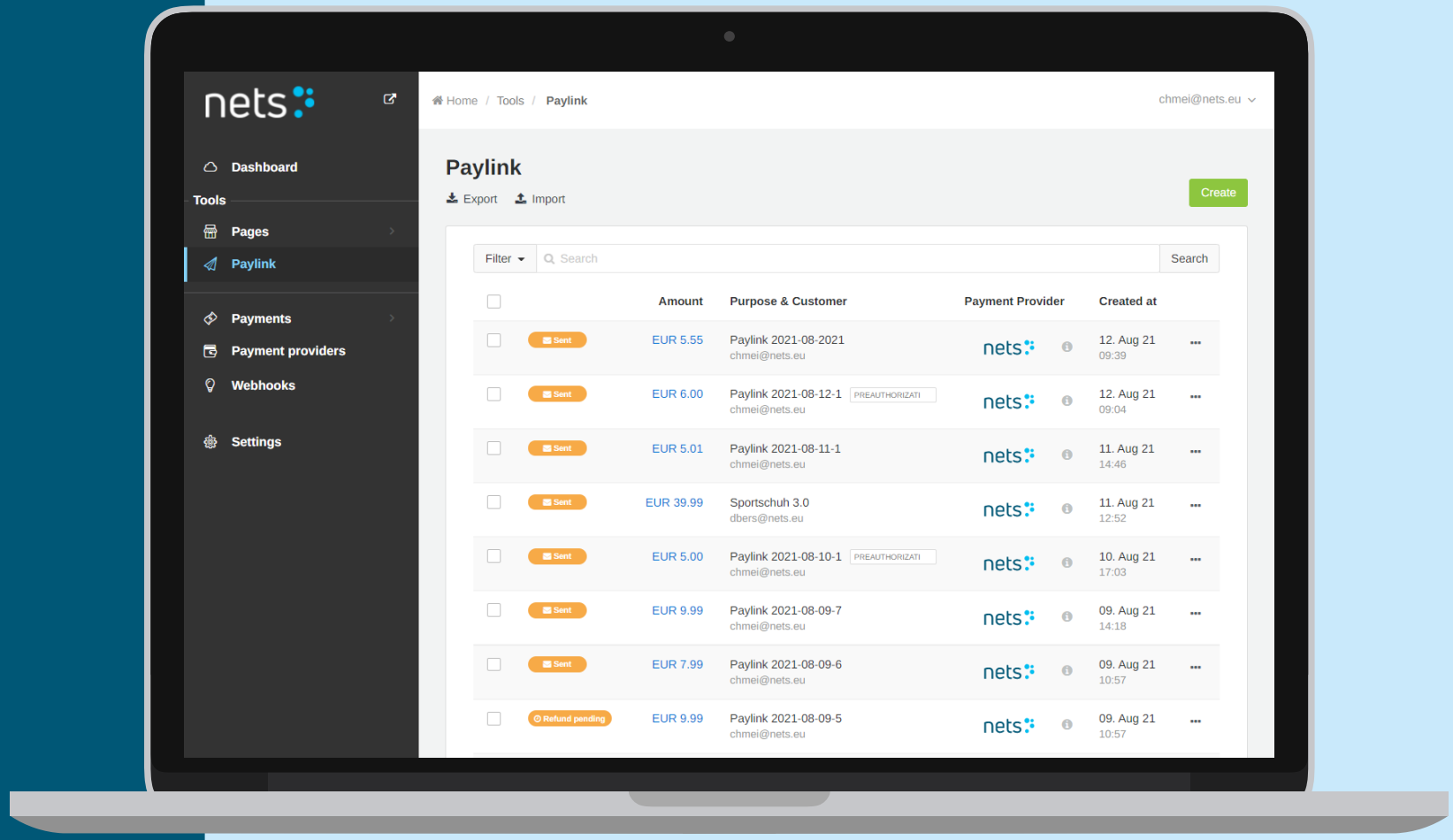
- Choose in which look & feel the paylink should be displayed.
- By clicking on the green „Create“ button, you send the paylink to the recipient.



easy | nets

Create a Paylink

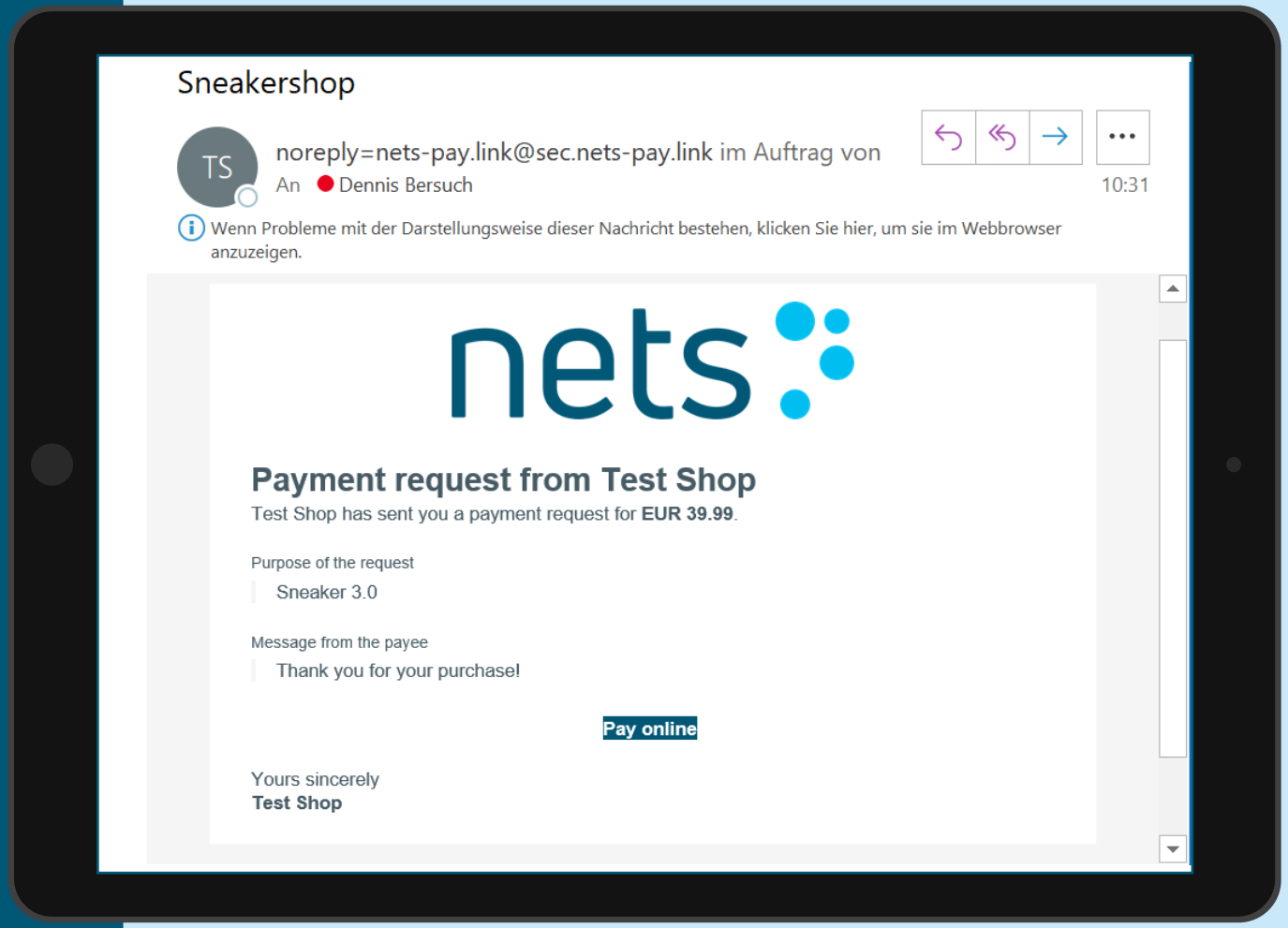
- Once the link is created you can see a new entry including the status in the Paylink list
- You can view, edit, copy or delete the paylink.



easy | nets

Create a Paylink

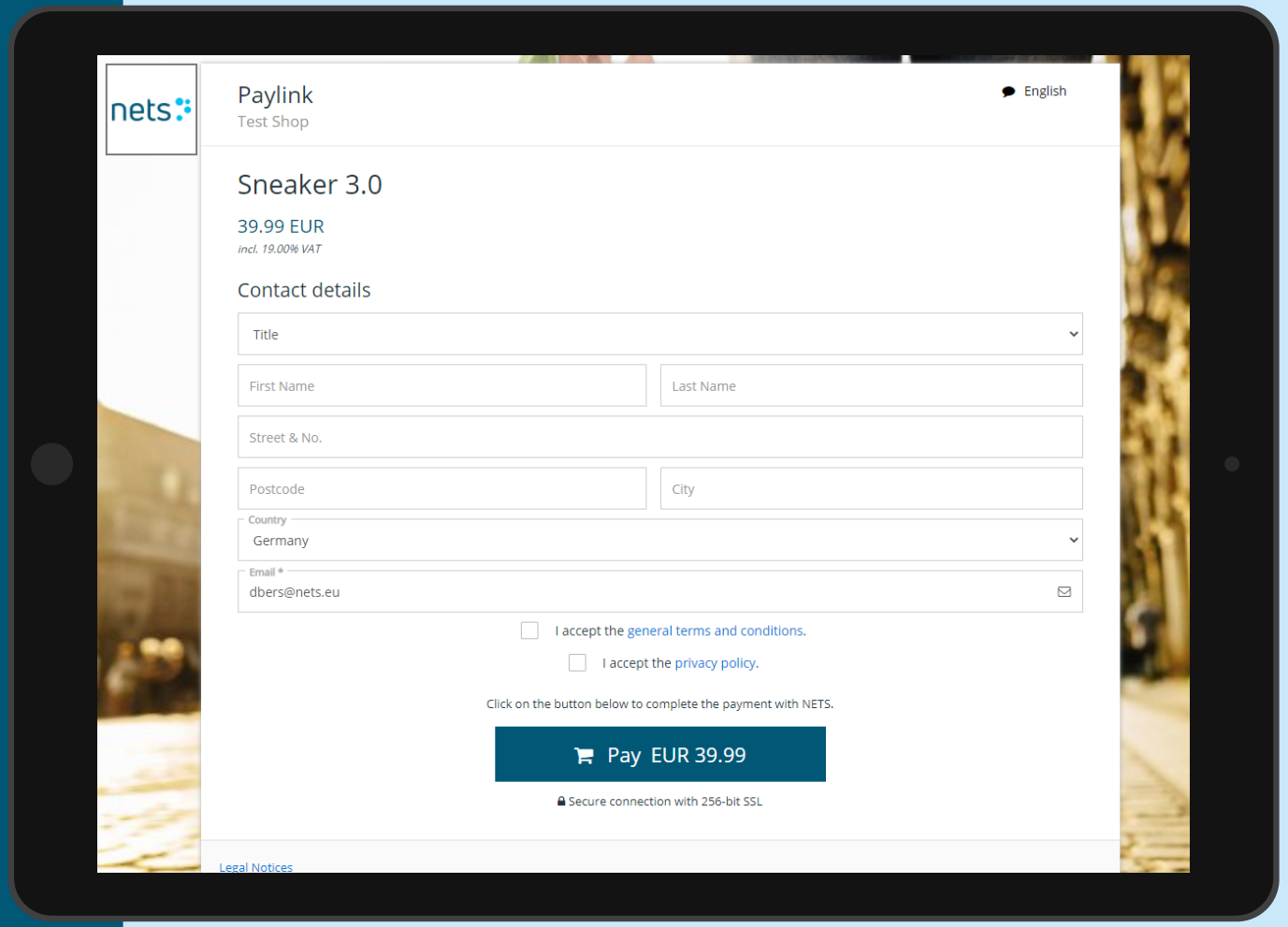
- This is how the e-mail that your customers reveive looks like.
- Note: If you uploaded a logo into your profile this logo will be used.



easy | nets

Create a Paylink

- This is how the paylink looks like when the customer opens it.



easy | nets

Create a Paylink with optional parameters

easy | nets

Paylink Options

General:

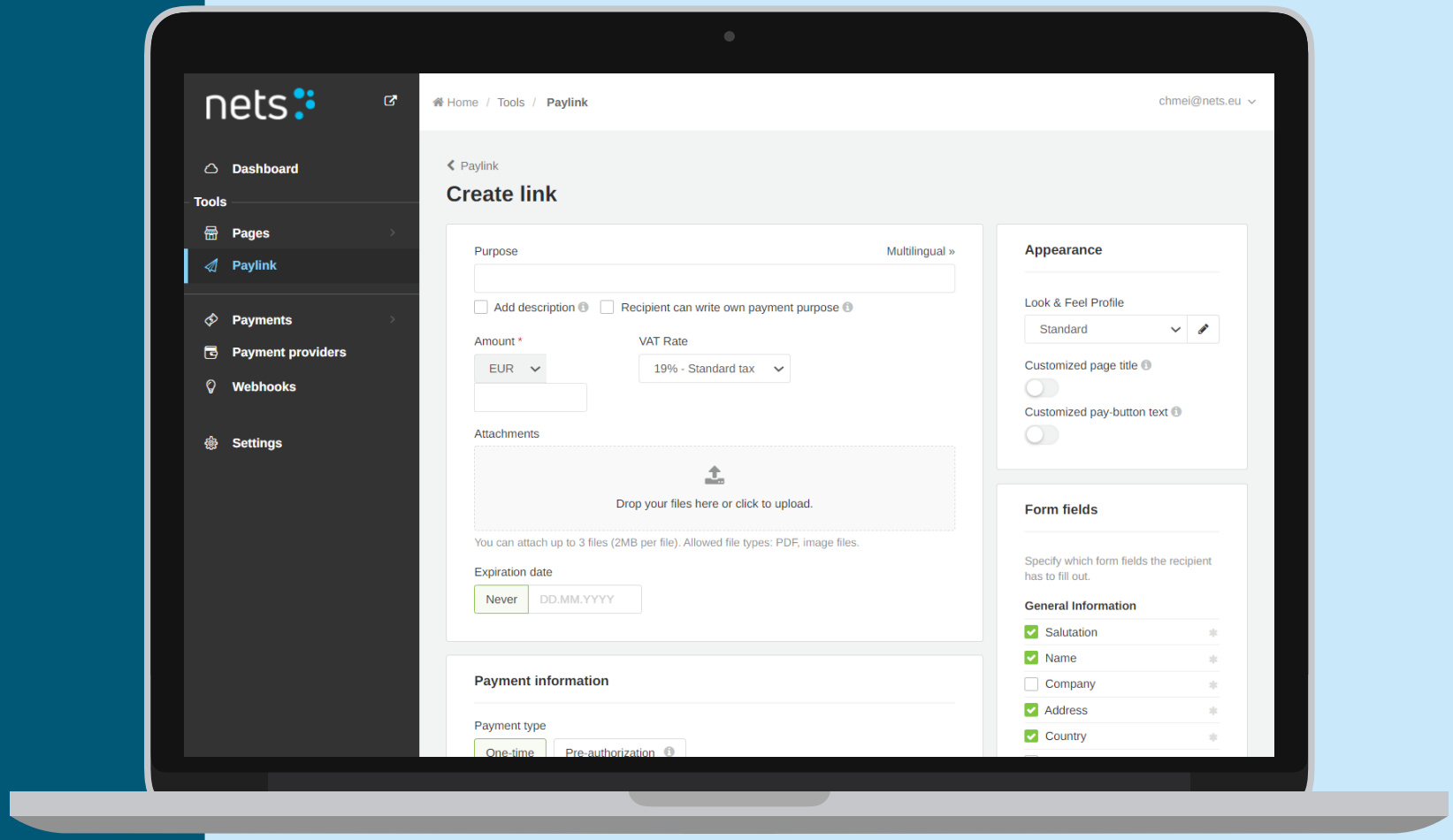
- You can add a description for your paylink, which will be displayed „on top“ of the paylink page.
- Upload attachments that will be displayed on the paylink page.
- Specify an expiration date for the paylink.

Appearance:

- Choose a **page title** for the payment page.
- Customize the text label for the „pay-button“.

Form fields:

- Define which input forms for customer data should be displayed.



easy | nets

Paylink Options

Recipient:

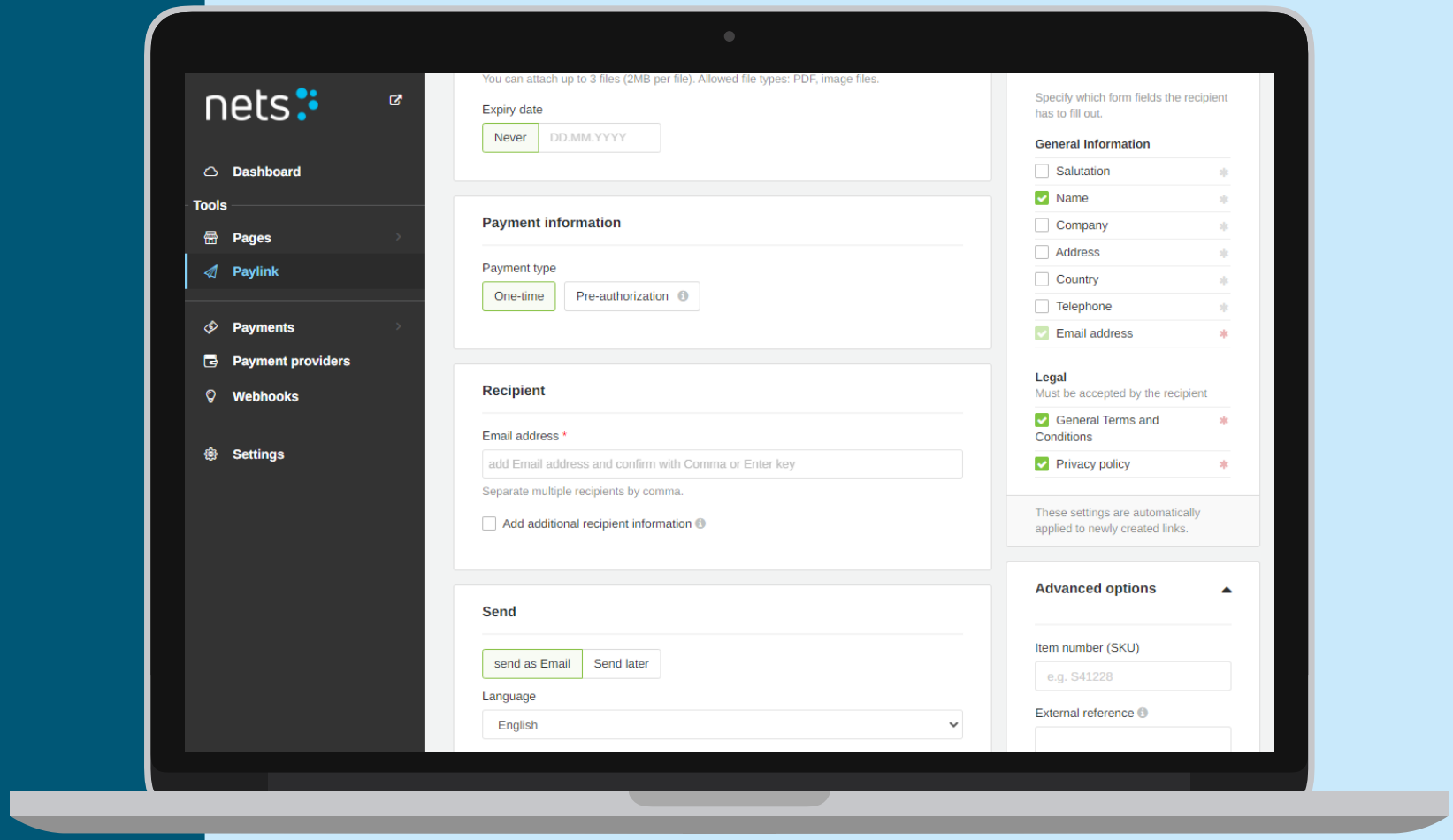
- You can pre-fill recipient information. The customer can still change the data (e.g. in case of a wrong address).

Legal:

- You can specify if the customer has to accept the general terms and conditions and/or the privacy policy before he can make a payment.

Advanced Options:

- For the reconciliation within the Easy patform you can specify your own **external reference**. This will also be shown in the Easy portal.

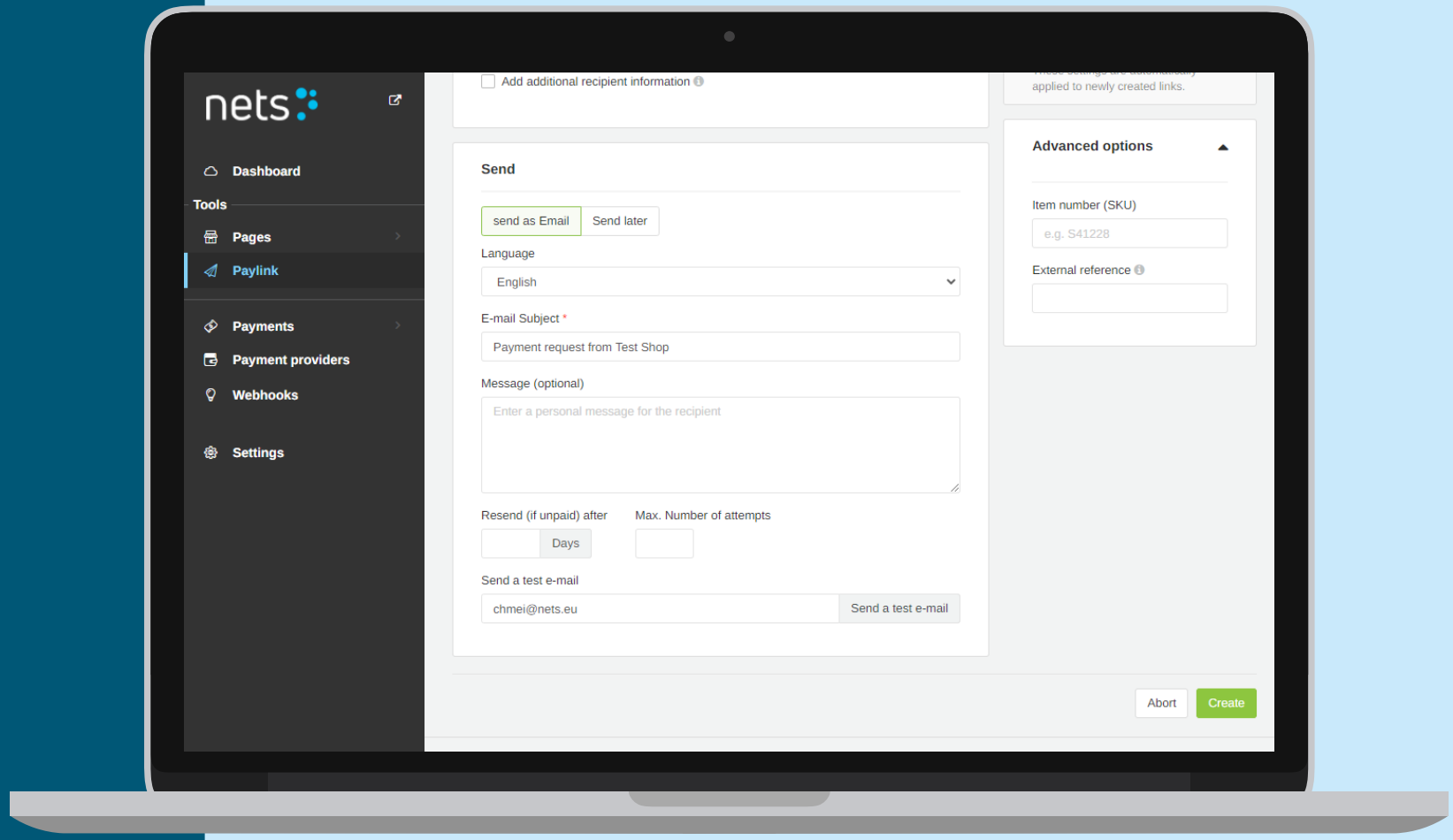


easy | nets

Paylink Options

Send:

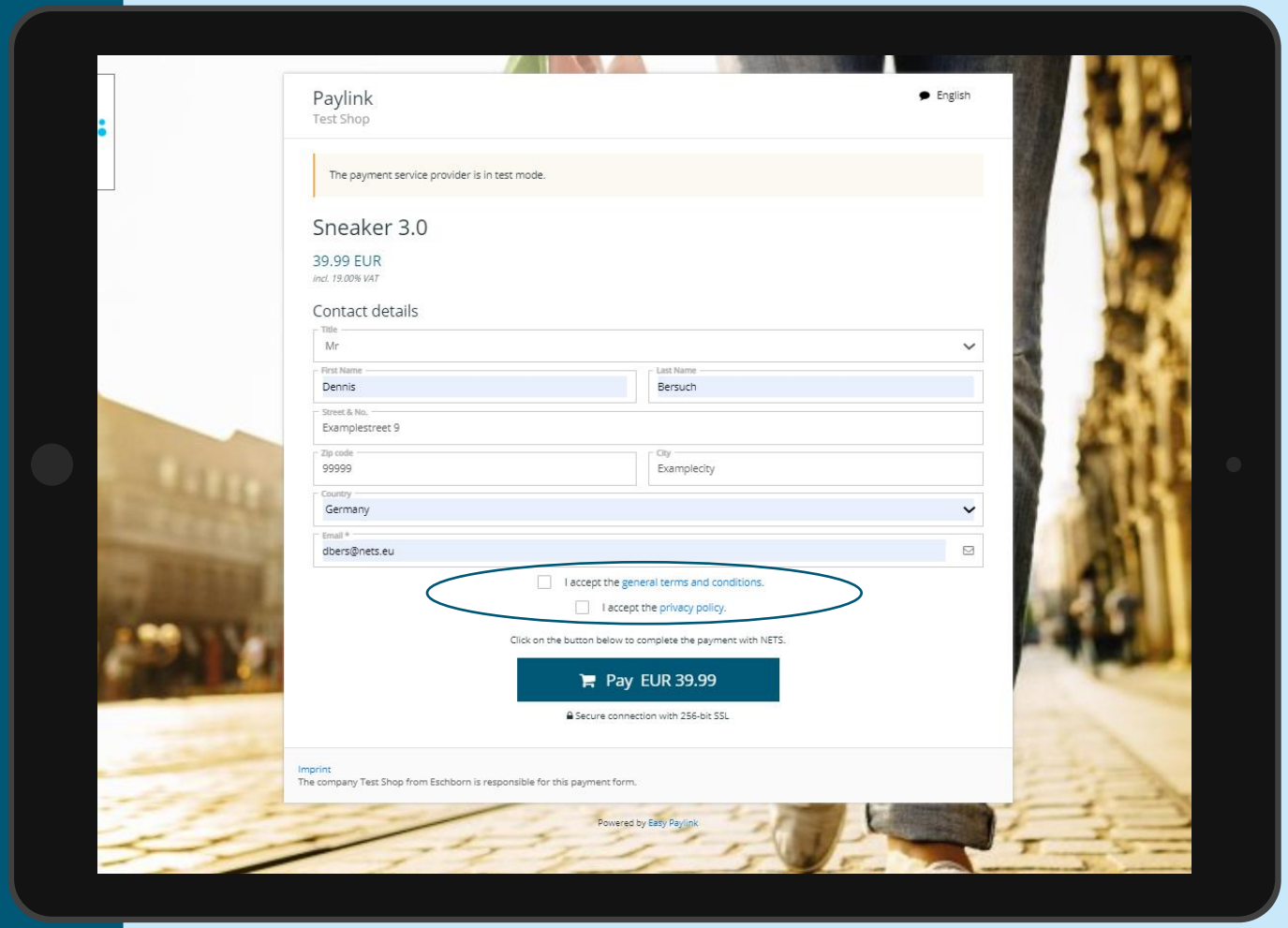
- You have the option to save a paylink without sending it (can be sent at a later stage).
- You can customize the subject and define an additional message.
- You can define a resend logic in case the paylink won‘t be paid.
- You have the option to send the paylink to yourself before you send it to your customer.



easy | nets

Paylink Options

- Here you can see the prefilled recipient information
- In this example the general terms and conditions and the privacy policy have to be accepted.



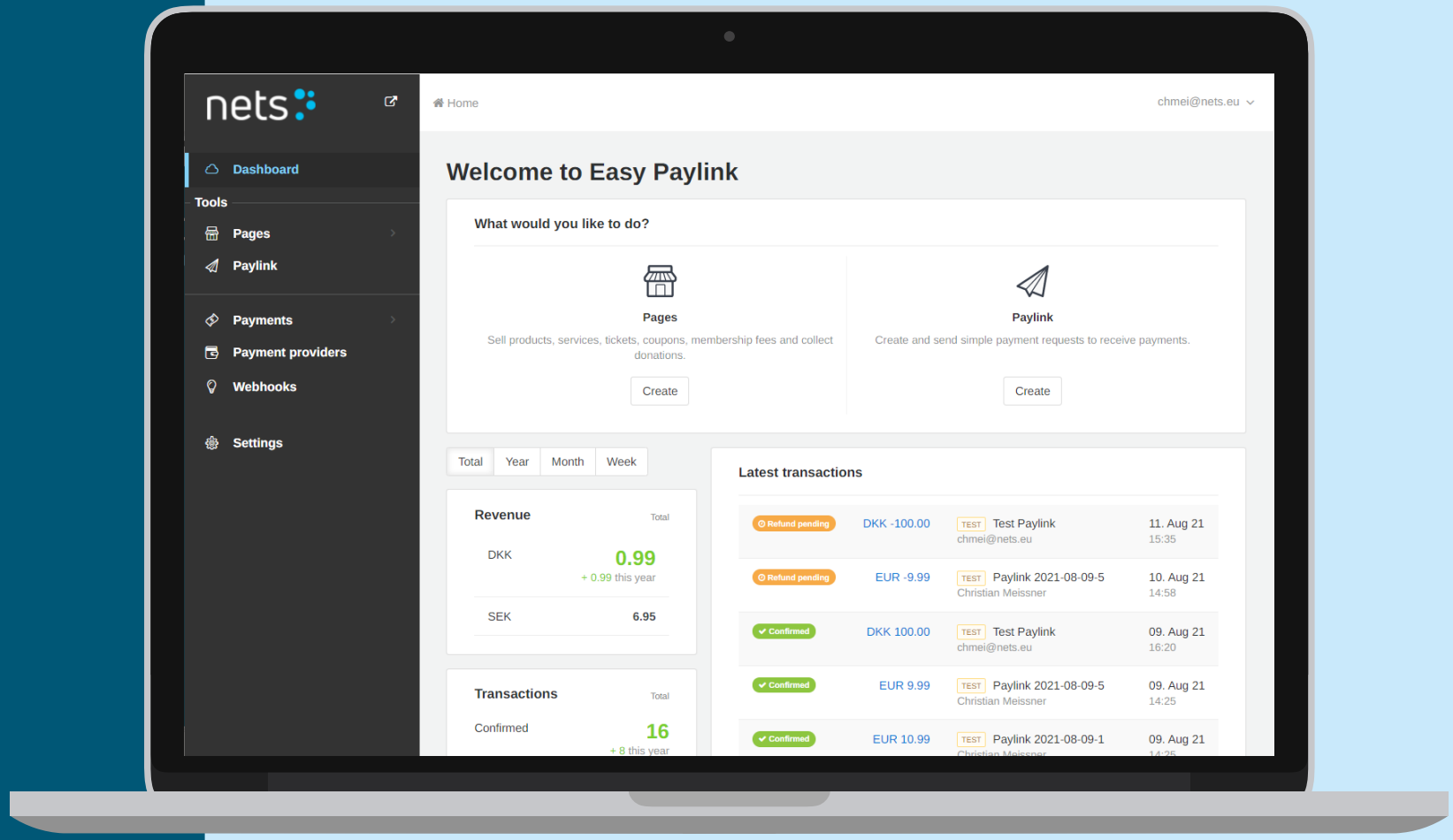
Create a One Page Shop

In this tutorial we show you how to create your own One Page Shop in 7 steps.

easy | nets

Create a One Page Shop

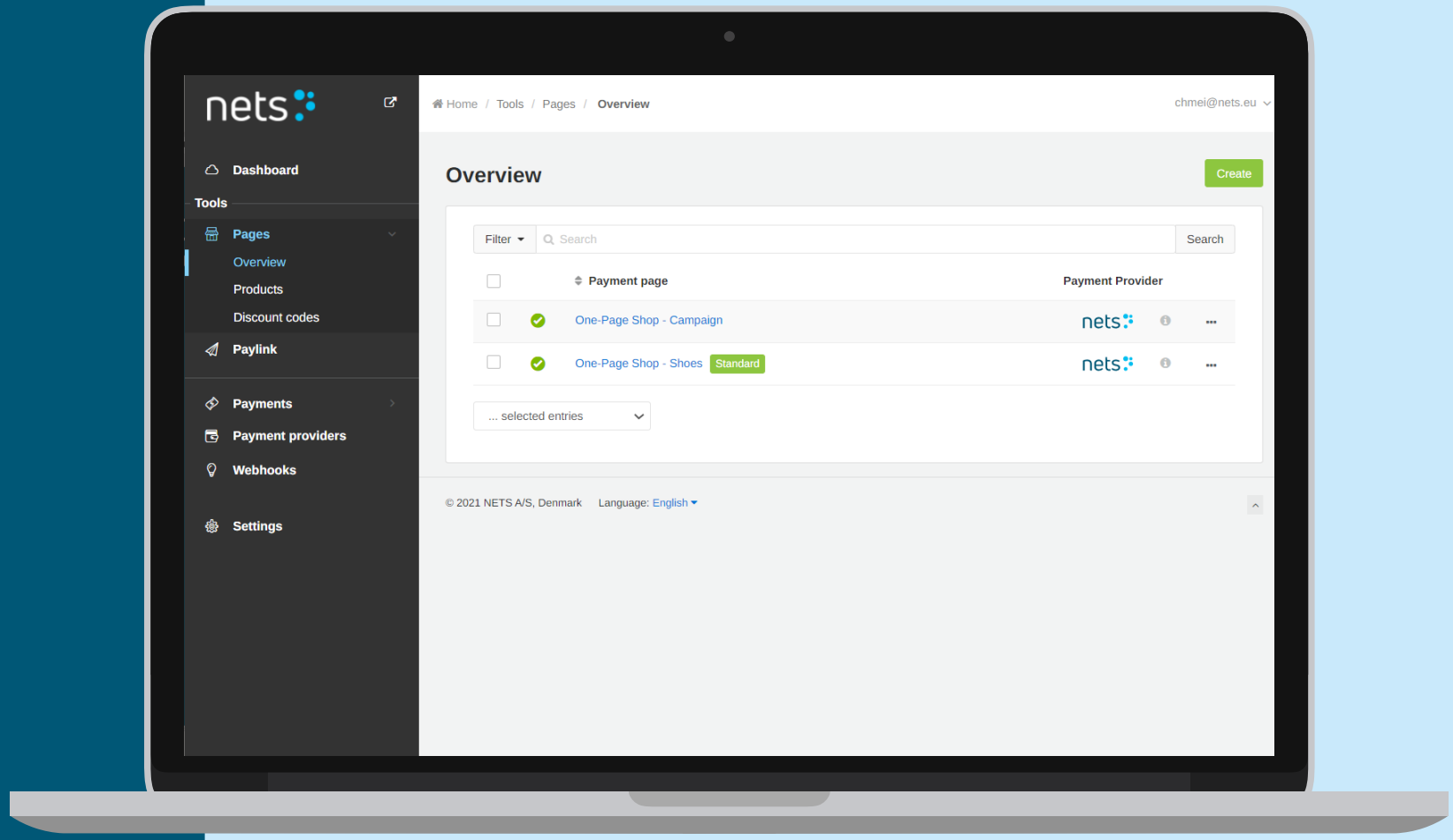
- Click on the „Pages“ tab on the left and afterwards on the „Overview“ menu.



easy | nets

Create a One Page Shop

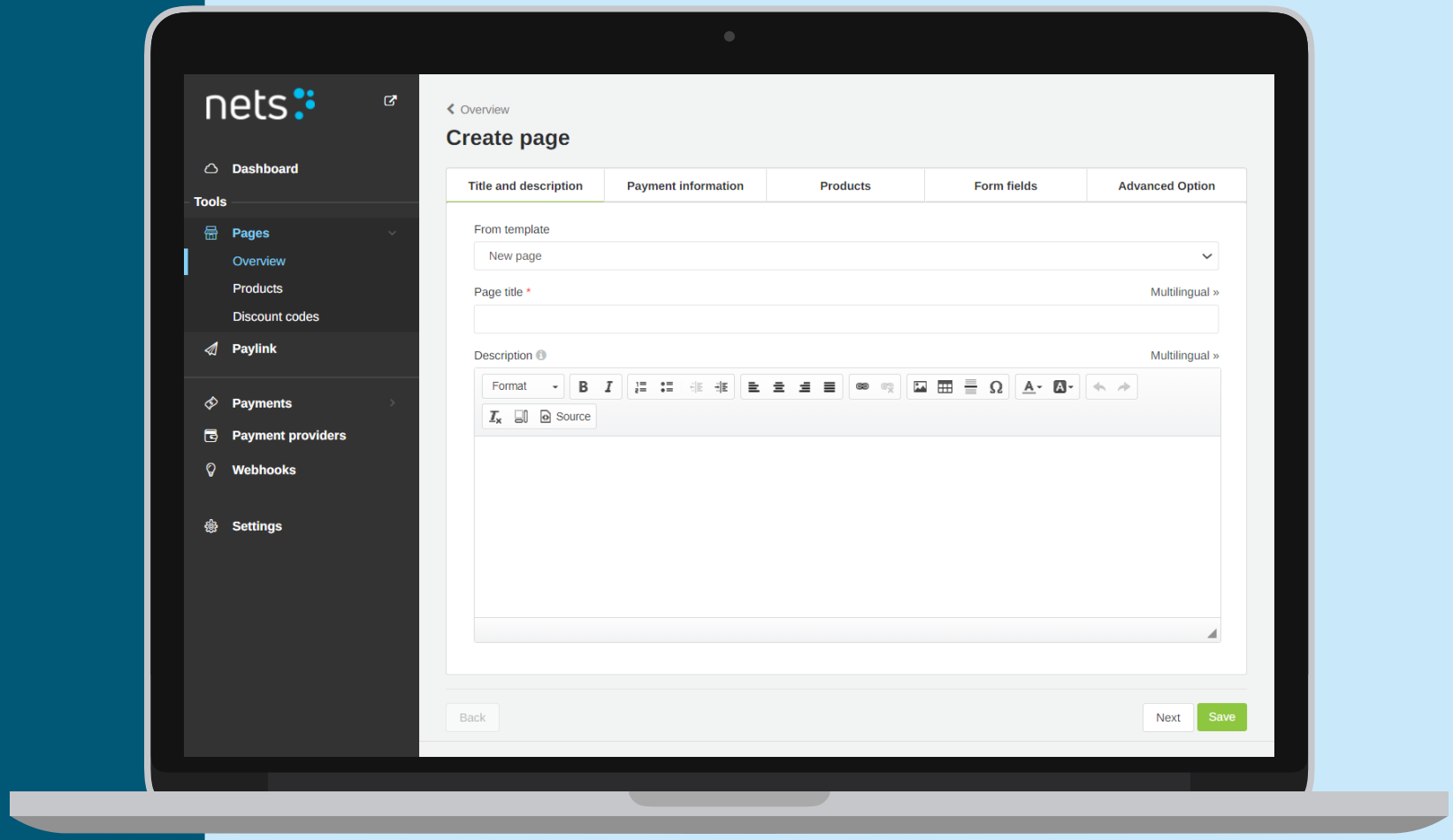
- Afterwards an overview of all your previous One Page Shops will open. To create a new One Page Shop click on the green „Create“-button.



easy | nets

Create a One Page Shop

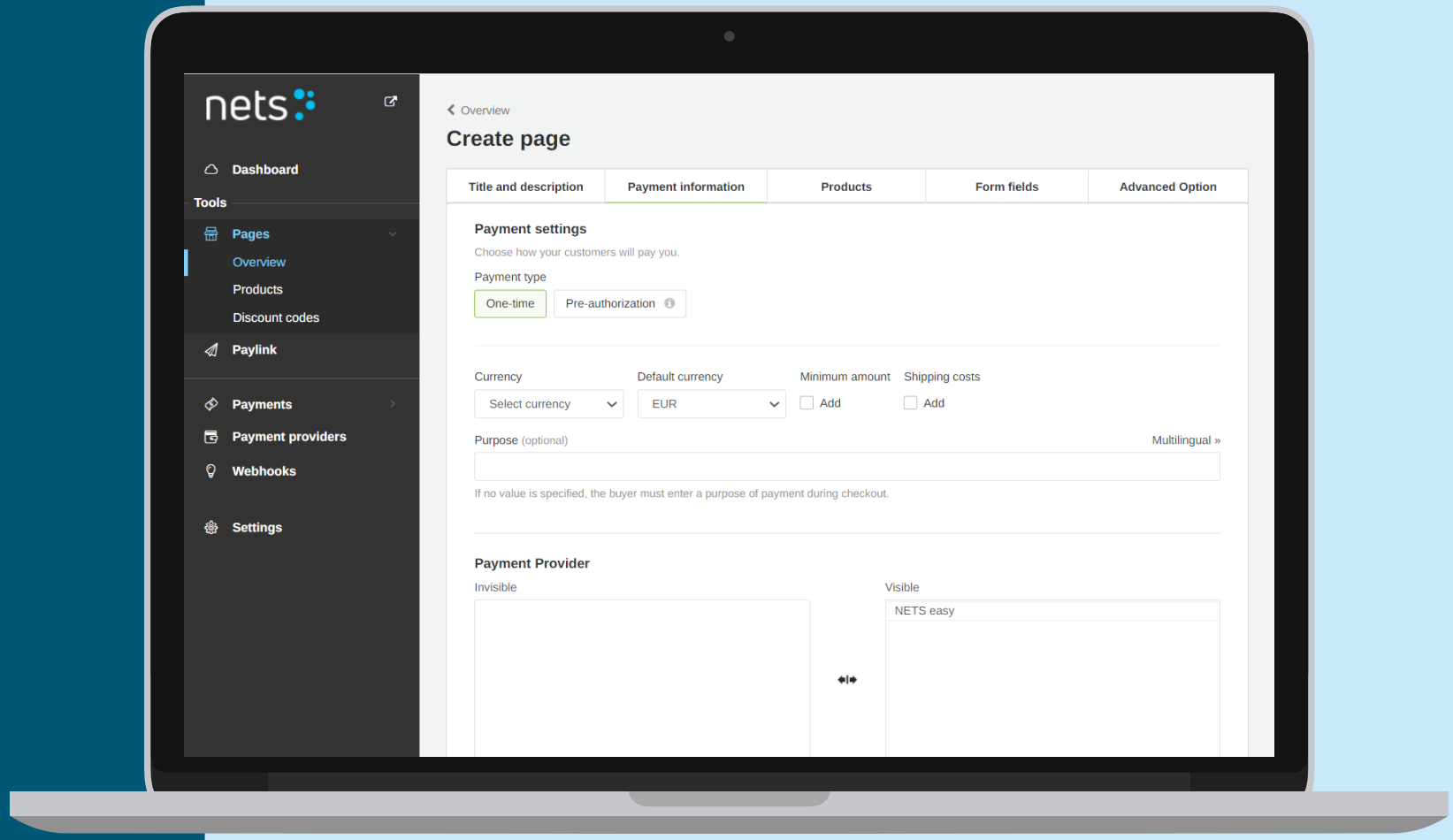
- Enter your page title.
- Add a description for your One Page Shop.
- Please click on the „Payment Information“ tab to continue creating your one Page Shop.



easy | nets

Create a One Page Shop

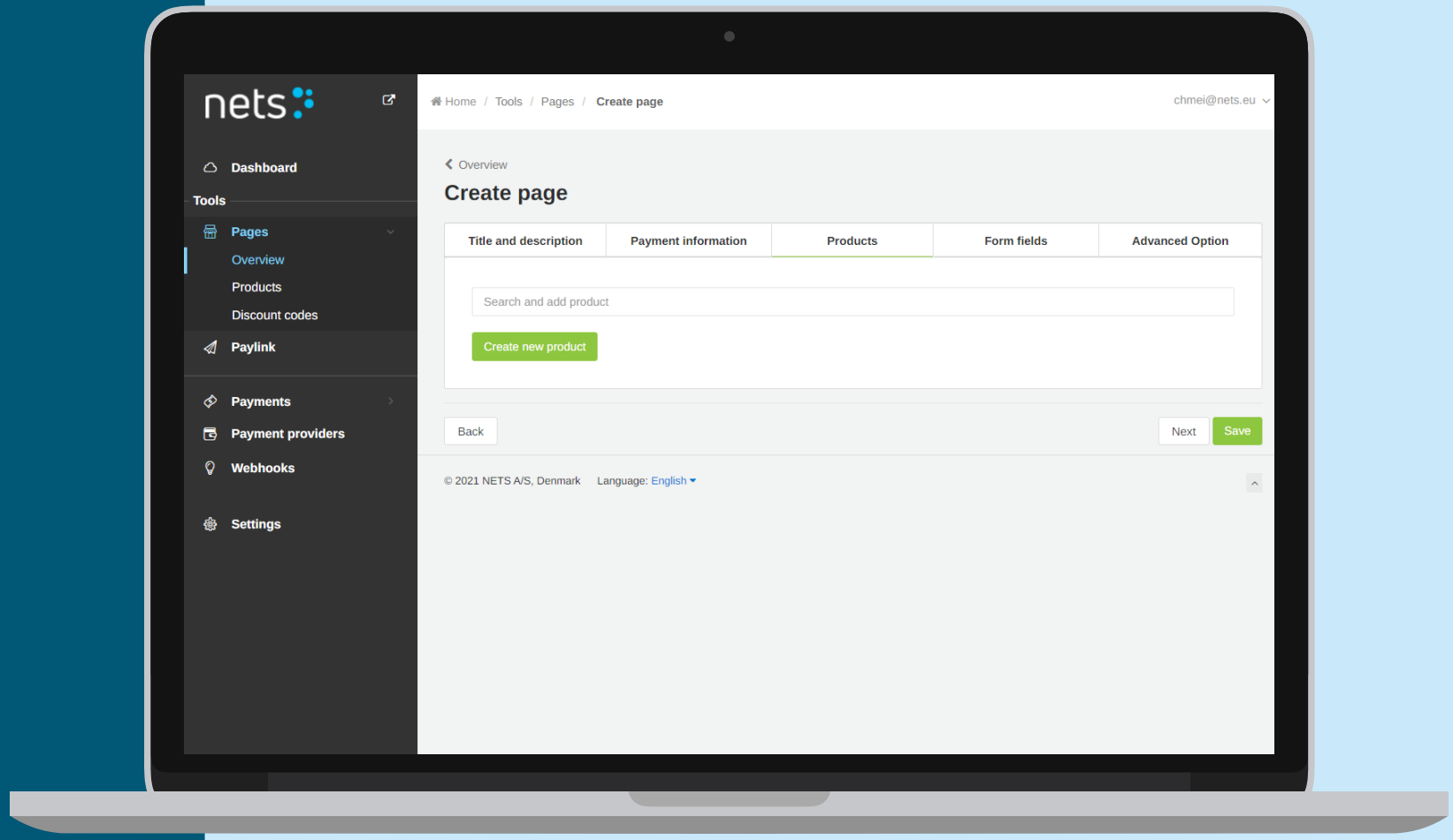
- You can choose between a one-time payment and a pre-authorization.
- You can select the currency in a drop-down in case your account supports multiple currencies. You can set the minimum amount for a valid order and shipping costs.
- **Purpose**: This field can only be filled in if you are not adding products to your One Page Shop.
- Please click on the „Products“ tab to continue creating your One Page Shop.



easy | nets

Create a One Page Shop

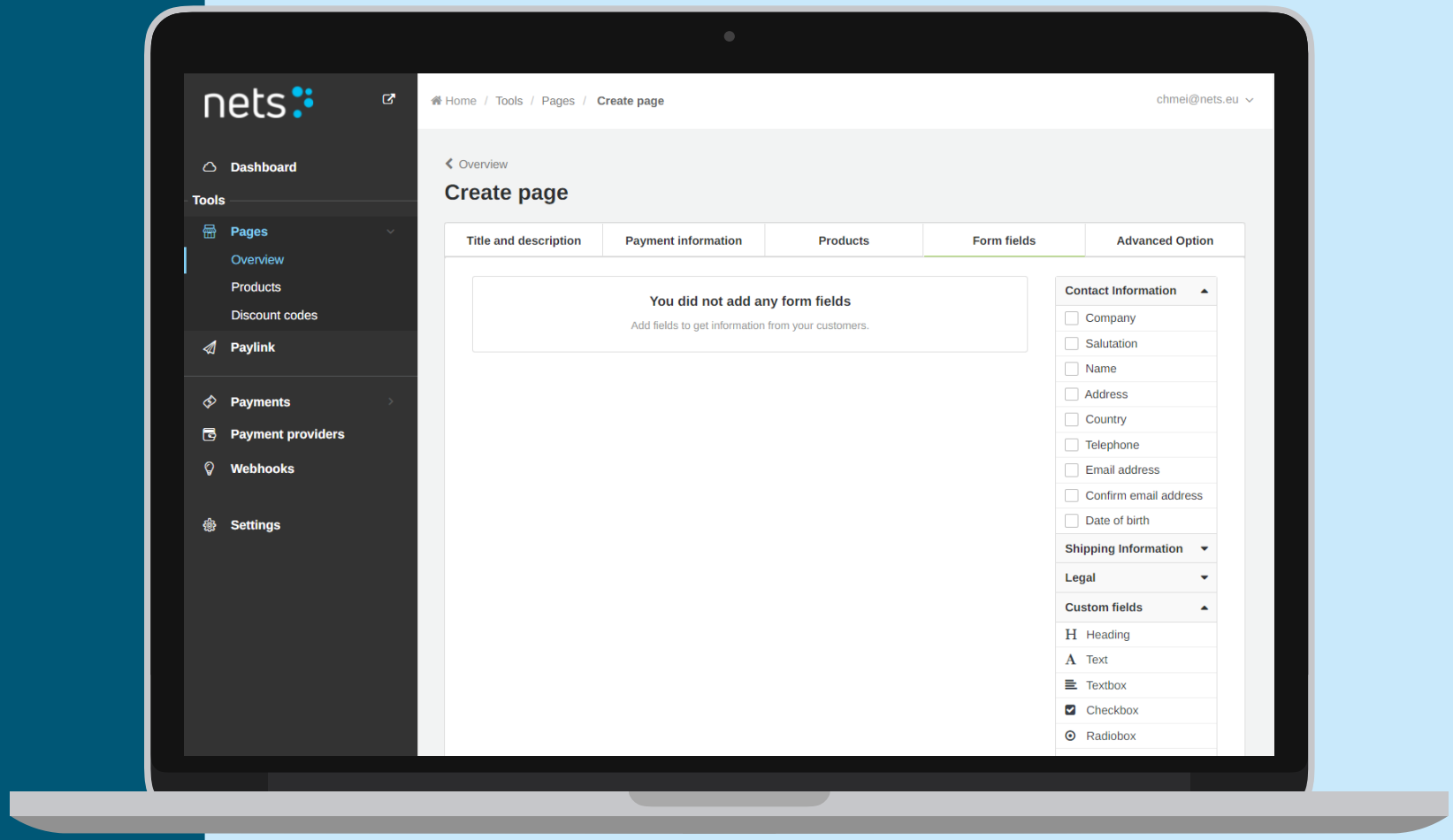
- You can search for your already existing products and add them to your One Page Shop.
- Alternatively you can create a new product by clicking on the green „Create new product“-button.
- Please click on the „Form fields“ tab to continue the creation of your One Page Shop.



easy | nets

Create a One Page Shop

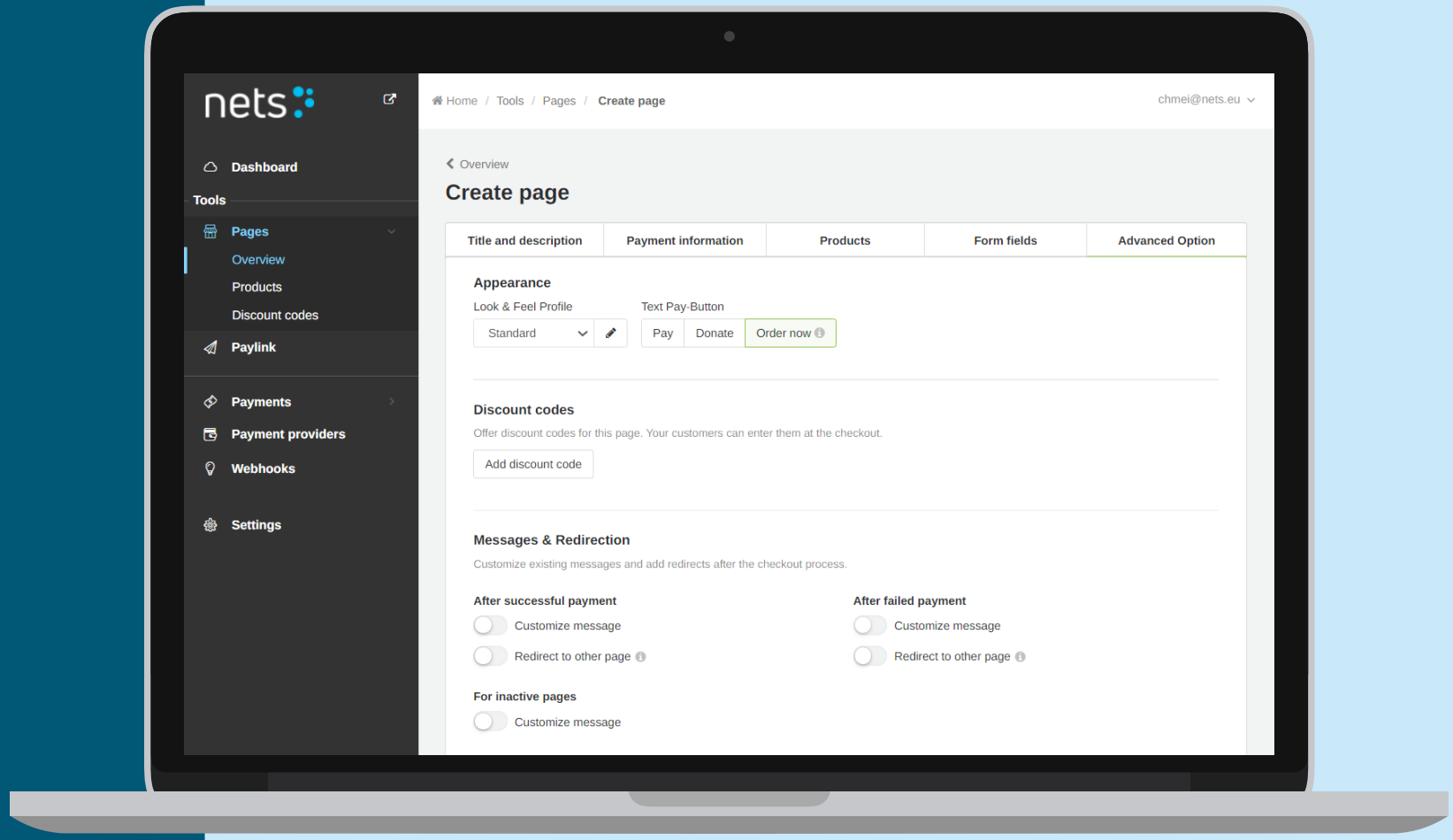
- You can determine which input fields should be displayed on your One Page Shop and whether they should be mandatory. To add a field, select it in the right side via the checkboxes.
- You can now create your One Page Shop by clicking on the green „Save“-button.
- However, you can still define some more options in the „Advanced Option“ tab.



easy | nets

Create a One Page Shop

- You can choose your Look & Feel for the One Page Shop.
- You can choose what how the pay-button should be labeled.
- You can define what should be displayed after a successful payment. You can also defined a redirect. (analog for failed payments)
- You can customize what should be displayed when your One Page Shop is inactive.
- To finish the One Page Shop creation cklick on the green „Save“ button.



easy | nets

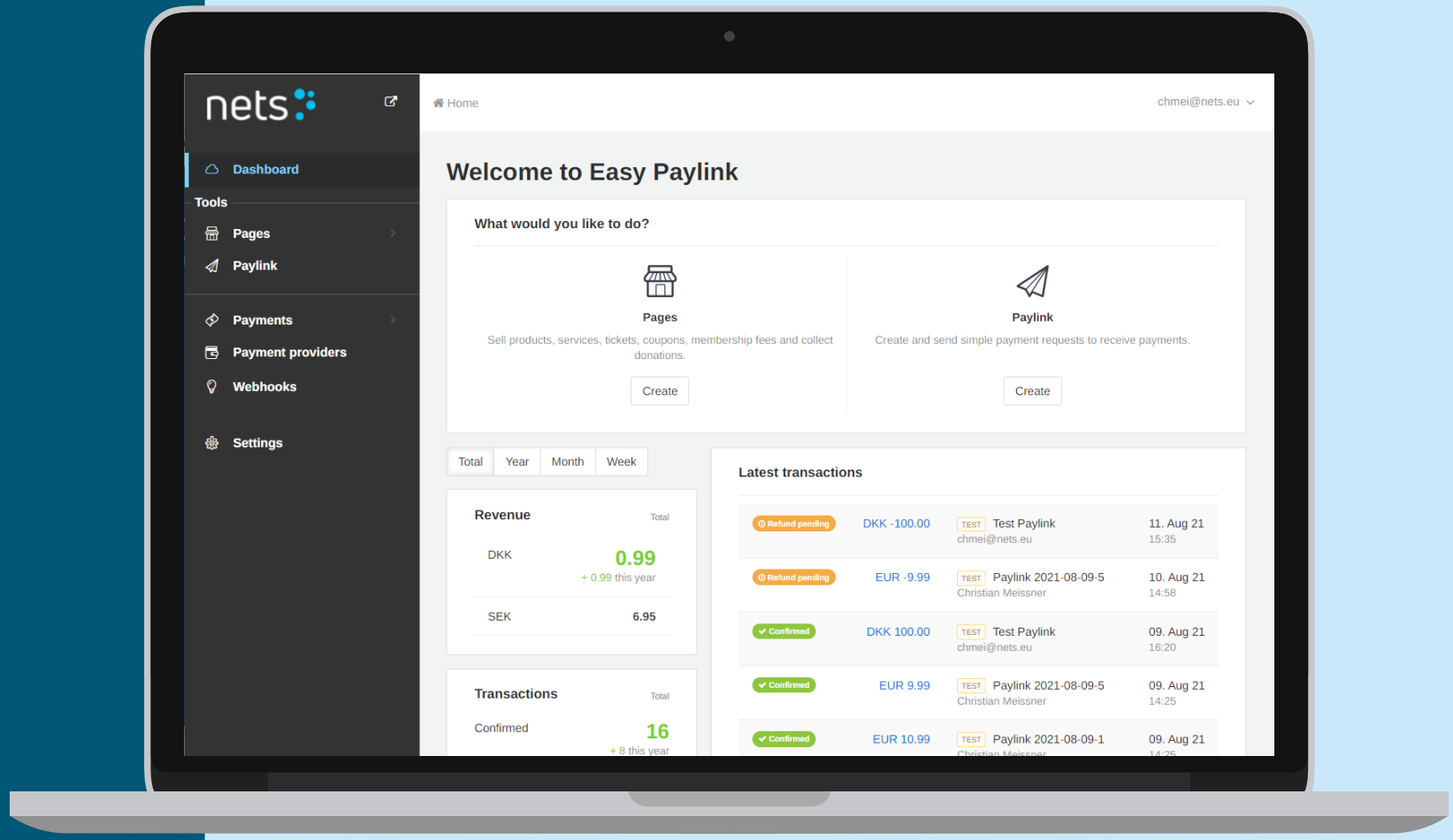
Add products

In this tutorial we show you how to create or add products in three steps.

easy | nets

Add Products

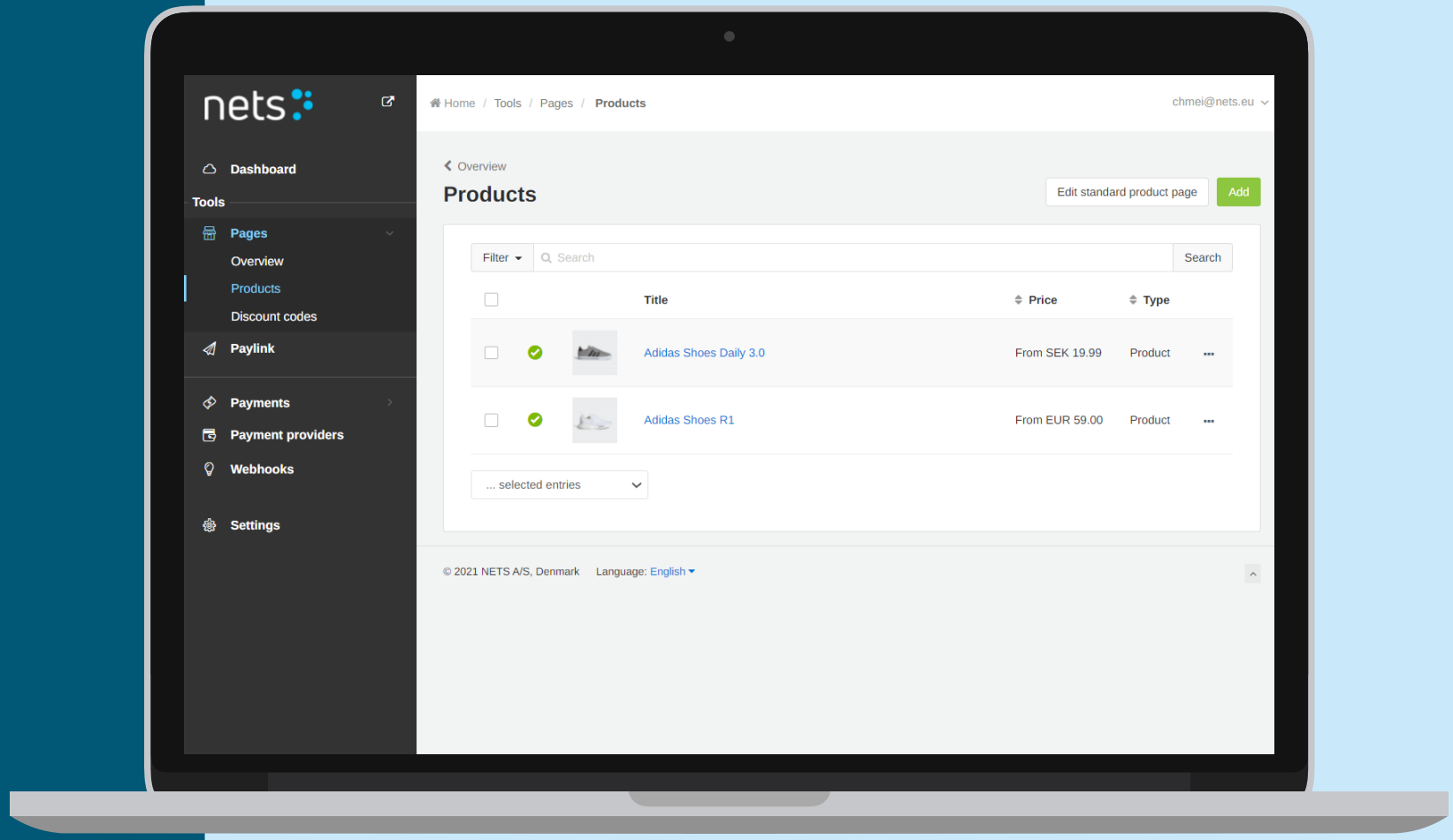
- Click on the „Pages“ tab on the left and select the „Products“ sub-section.



easy | nets

Add Products

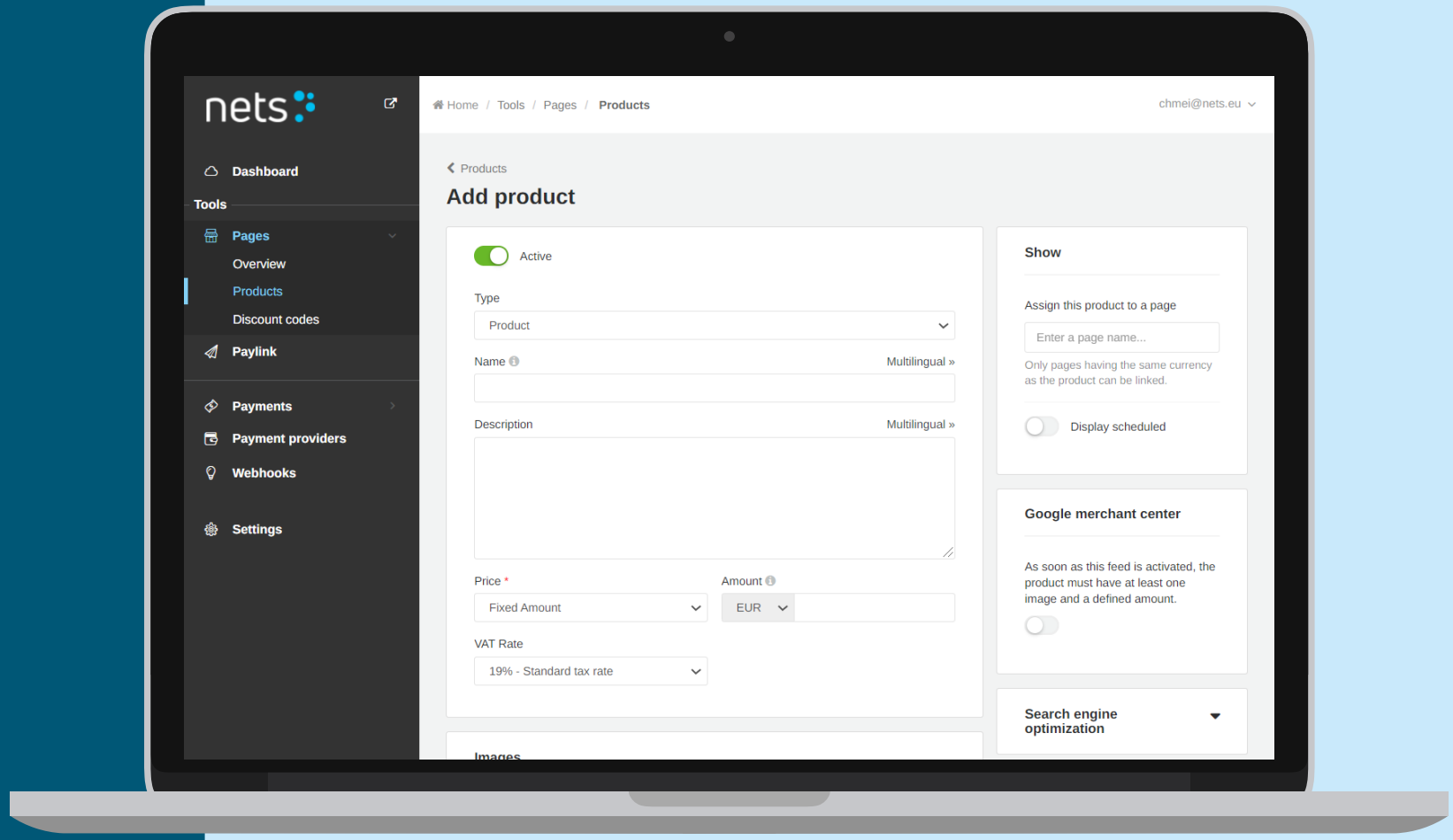
- To create a product click on the green „Add“-button.



easy | nets

Add Products

- In a drop-down menu you can select what type of product your product is.
- Define a name for your product.
- In the description you can enter additional information about your product.
- Enter the purchase price.
- Upload images of your product.
- You can add the product to an existing One Page Shop by entering the page title of the shop in the bar or by selecting the desired shop from the list.



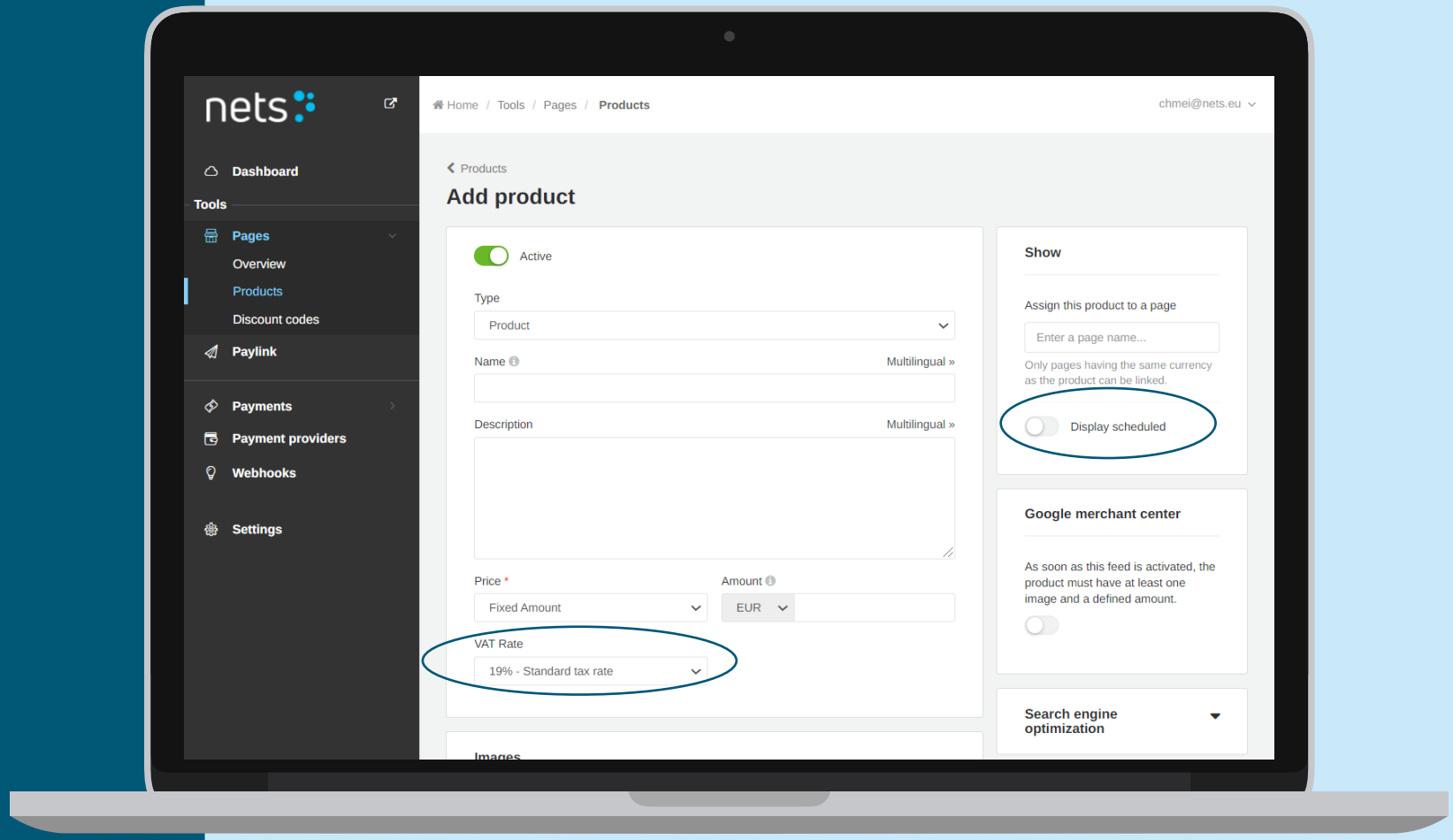
easy | nets

Add Products with optional parameters

easy | nets

Add Products

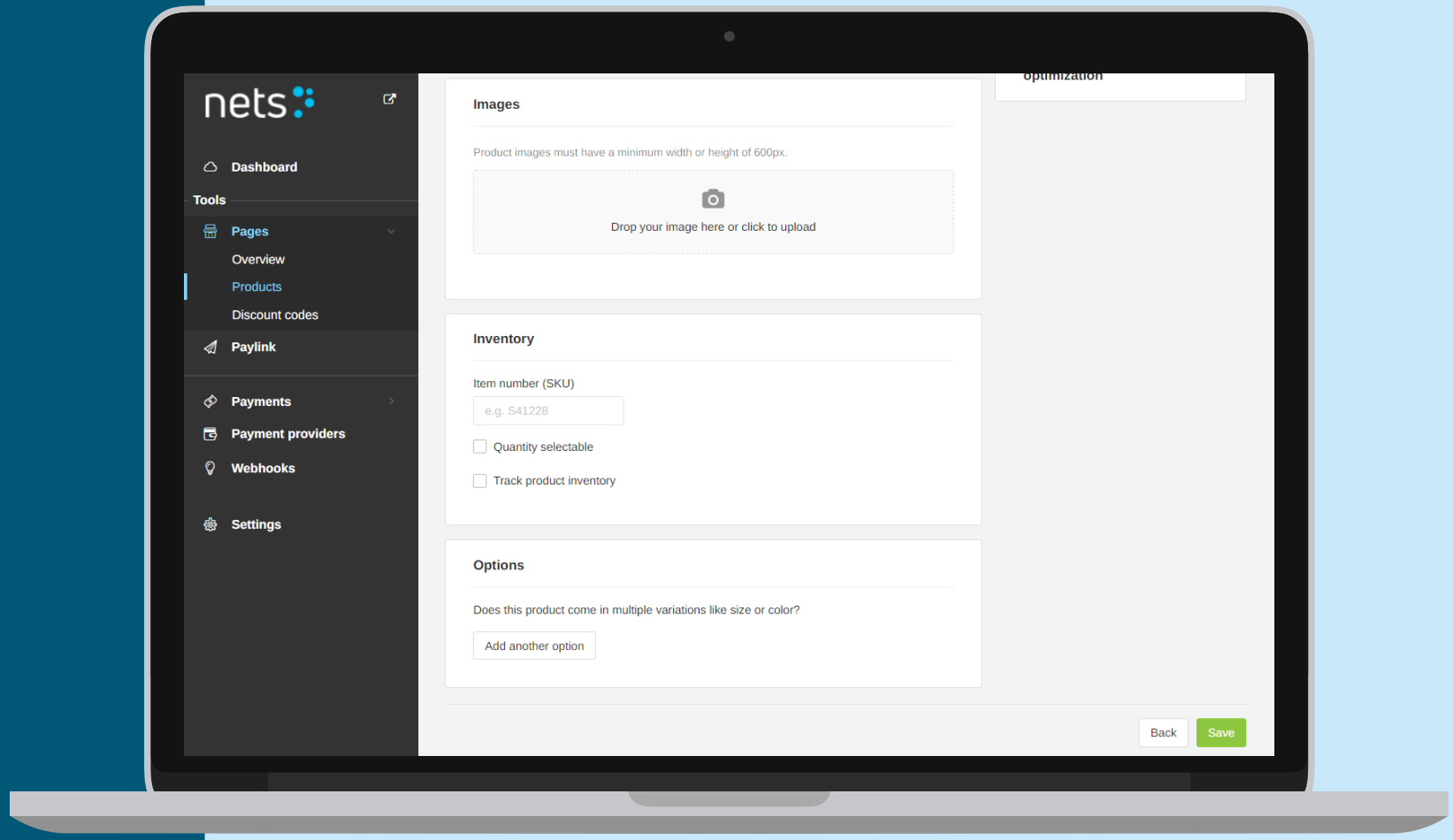
- You can also display your products only for a certain period of time. After this time your product will no longer be displayed.
- You can define the VAT rate.



easy | nets

Add Products

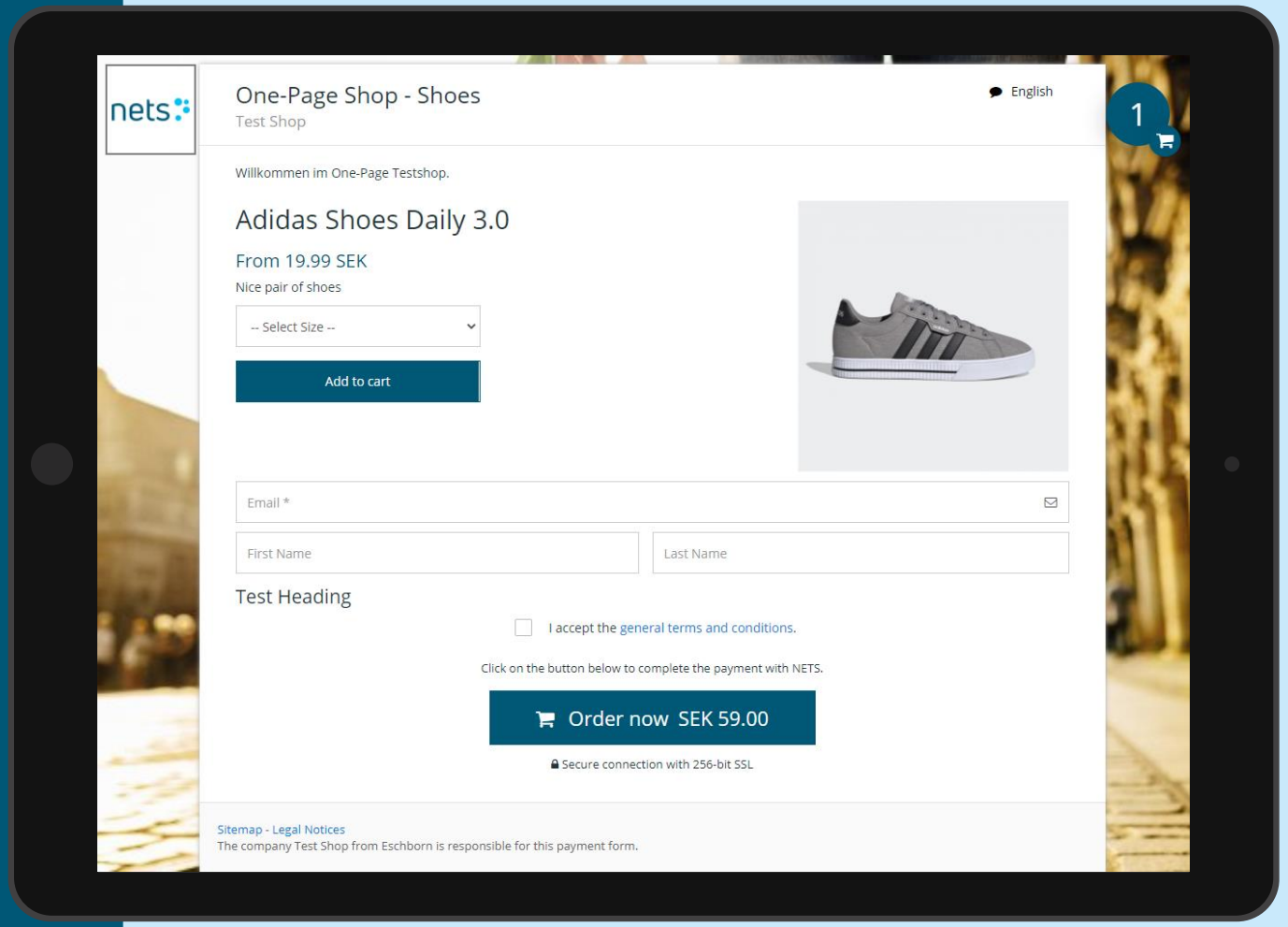
- You can define whether customers can choose an order quantity.
- You can keep track of your stock. You can only see the functions in the backend of the paylink.
- Under options you can list different variations of your product. It is important that you seperate each variation with a comma, because only then the system will create fields for these variations. Once the variations have been specified, the system will create fields for these, where you can enter the prices and SKU for the different products.
- To add your product, click on the green „Save“-button.



easy | nets

Add Products

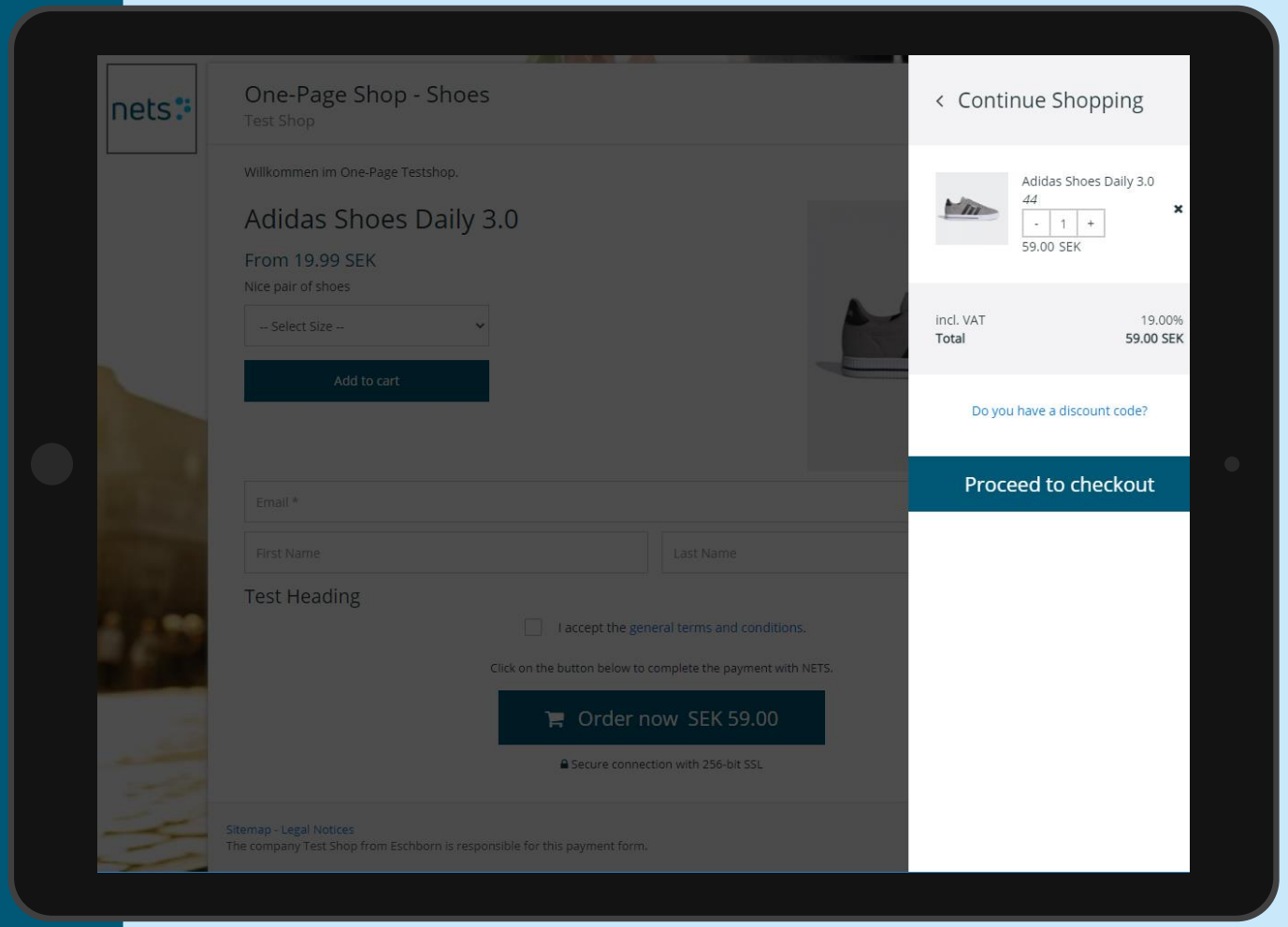
- Here you can see what the product page looks like when the customer opens it.
- The customer can choose the products and variations and add them to the shopping cart (accessible via the icon on the top right side).



easy | nets

Add Products

- In the shopping cart the customer will see the summary of the chosen products and prices and is able to finish the checkout via the „Proceed to checkout“ button.
- There is also an option to enter a discount code (if the feature is enabled for the shop).



easy | nets

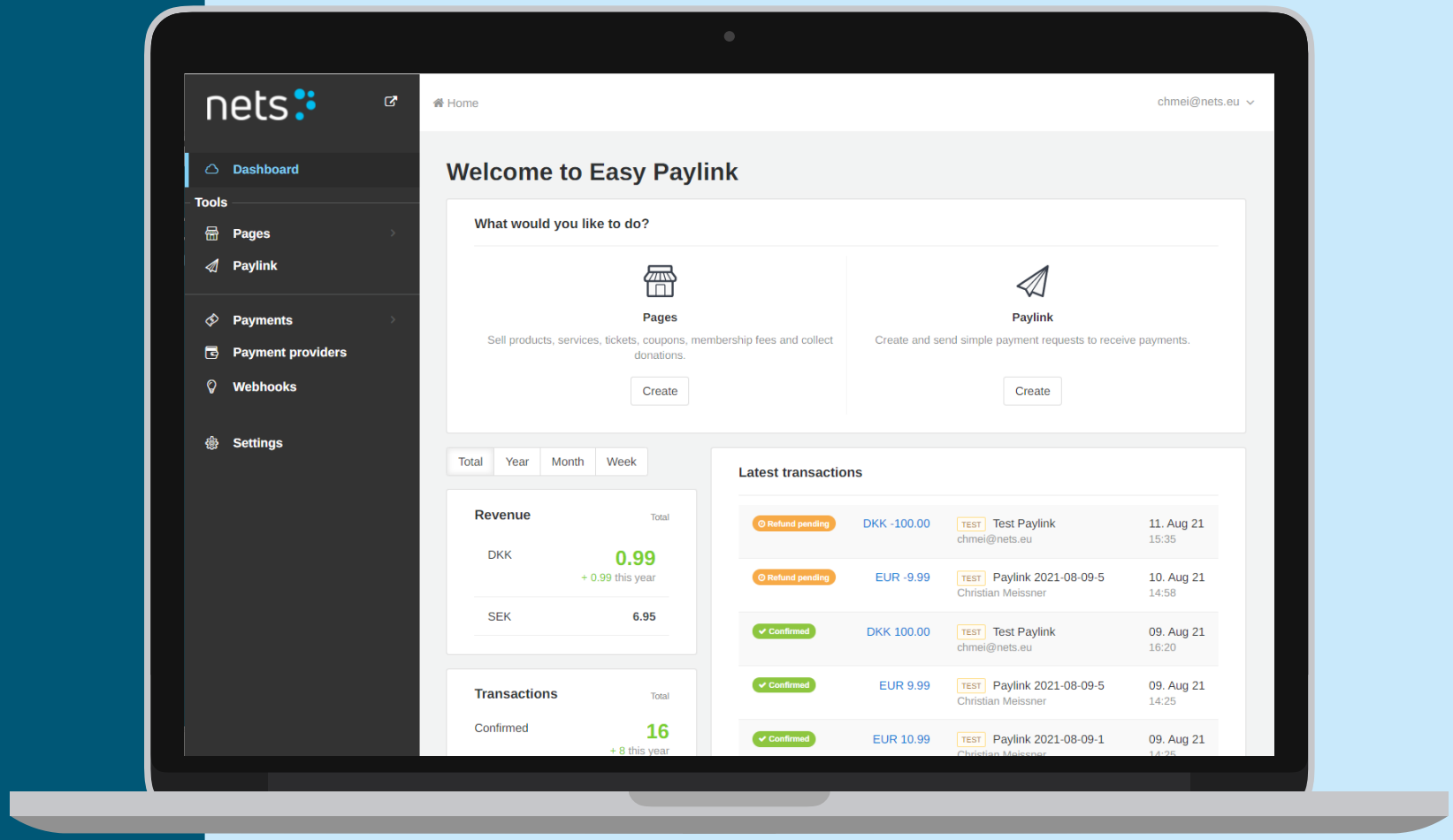
Activate Taxes

In this tutorial we show you how to activate the taxes in 4 steps.

easy | nets

Activate Taxes

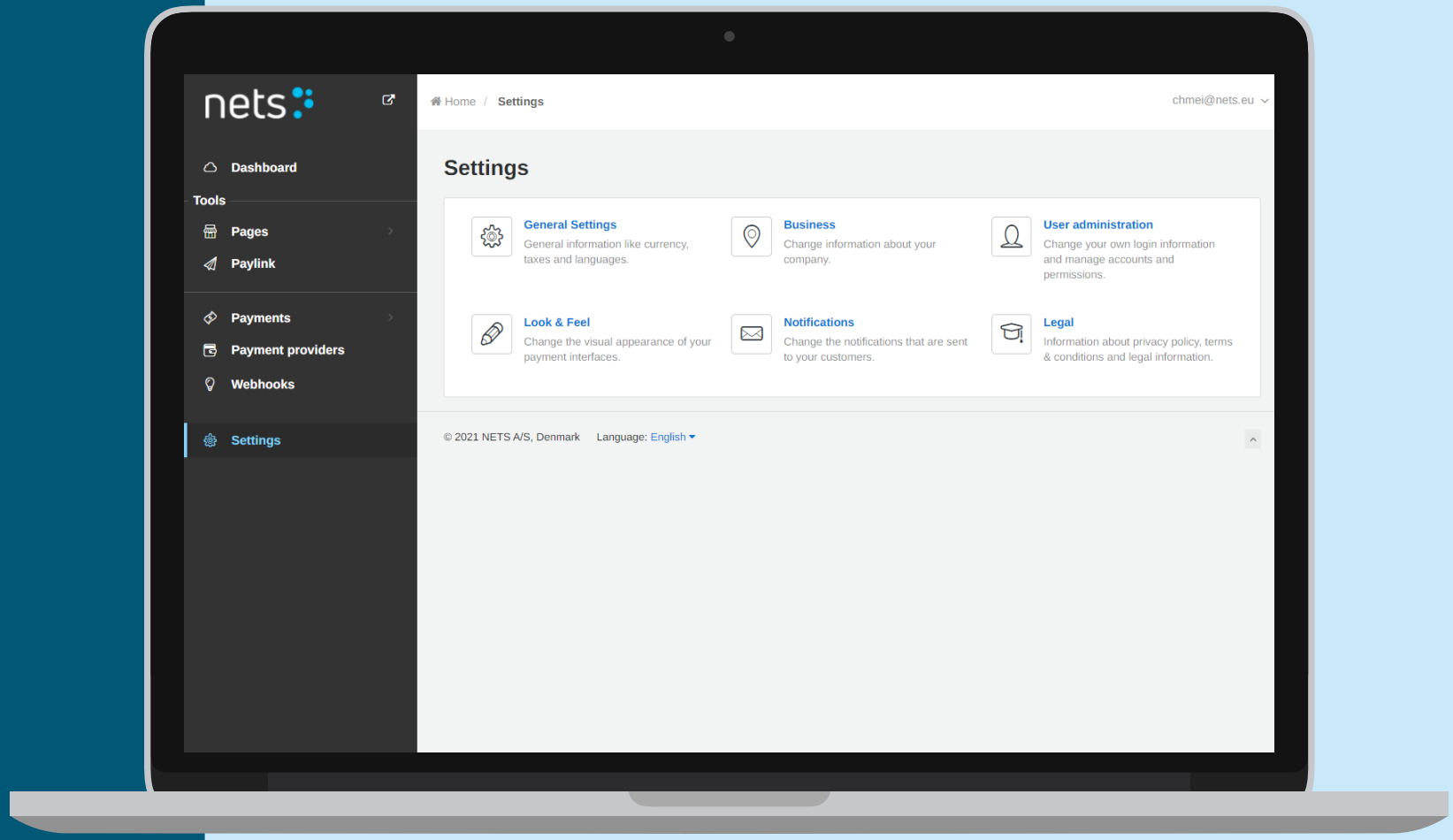
- Click on the „Settings“ tab on the left.



easy | nets

Activate Taxes

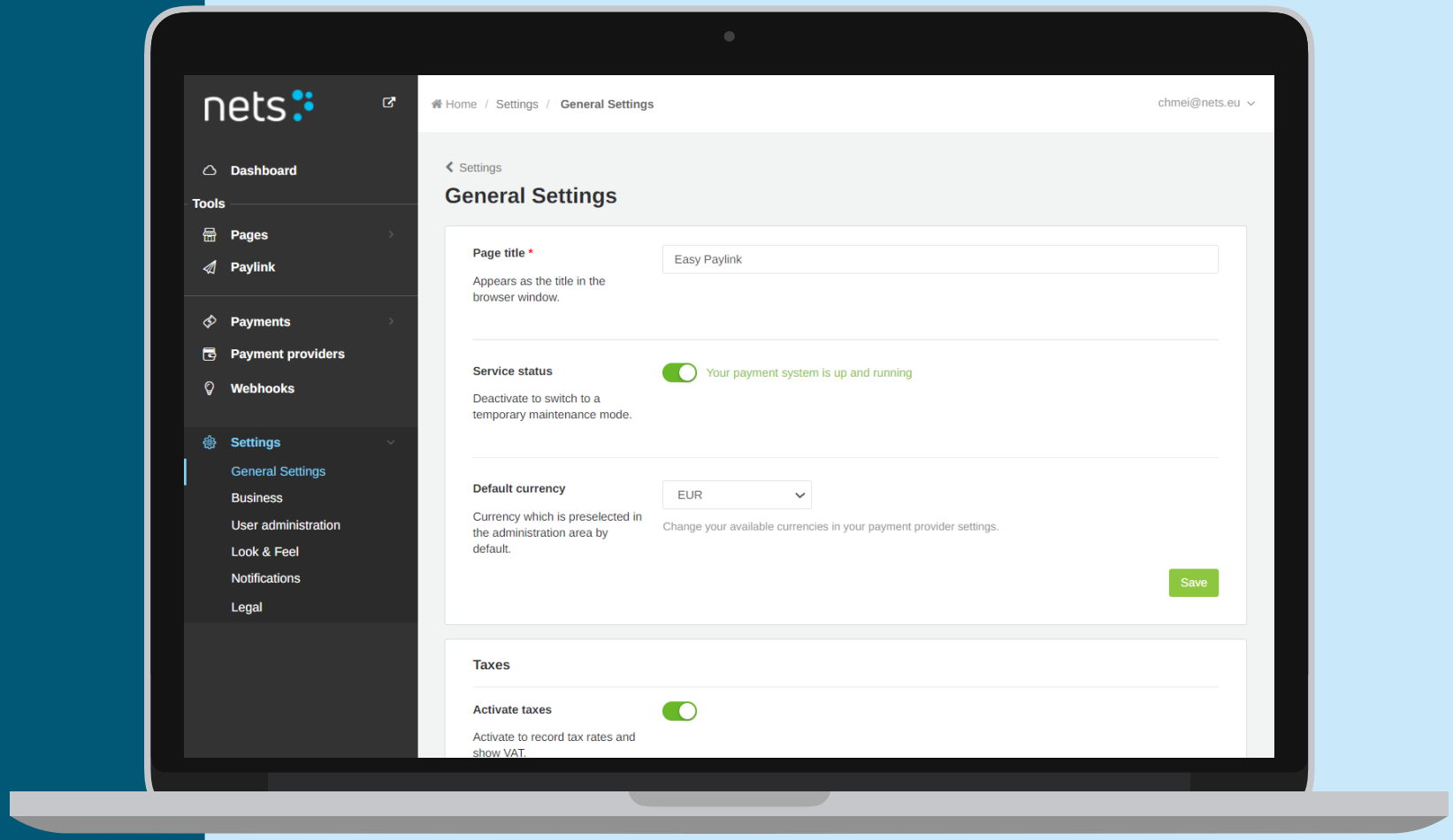
- Click on the „General Settings“ menu item.



easy | nets

Activate Taxes

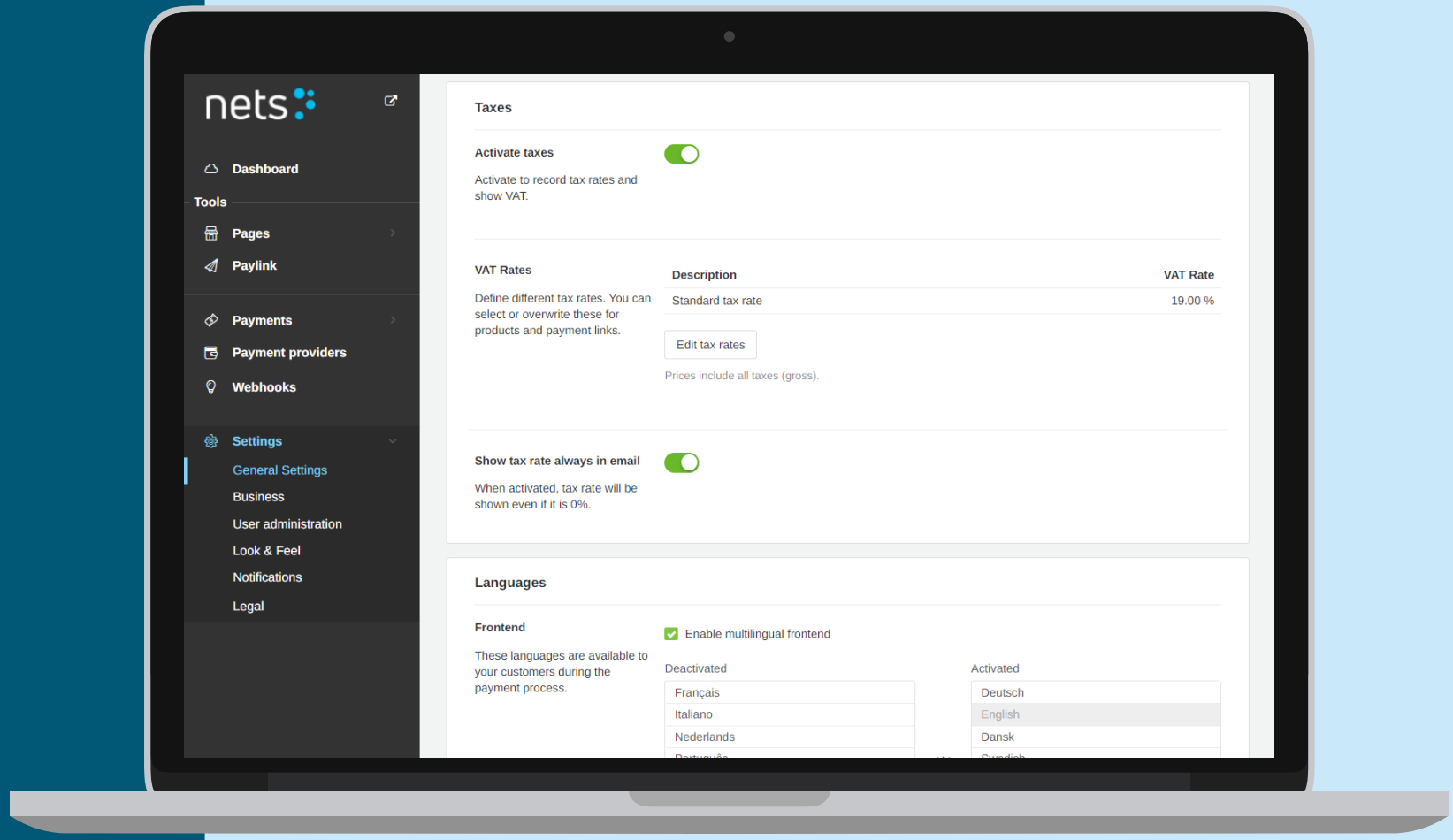
- Click on the „Activate taxes“ slider.



easy | nets

Activate Taxes

- As soon as the slider is activated, new fields will appear for your VAT information. Please enter the desired tax rate.
- You can also show the VAT information in each e-mail.
- Click on the green „Save“ button to confirm your settings.



easy | nets

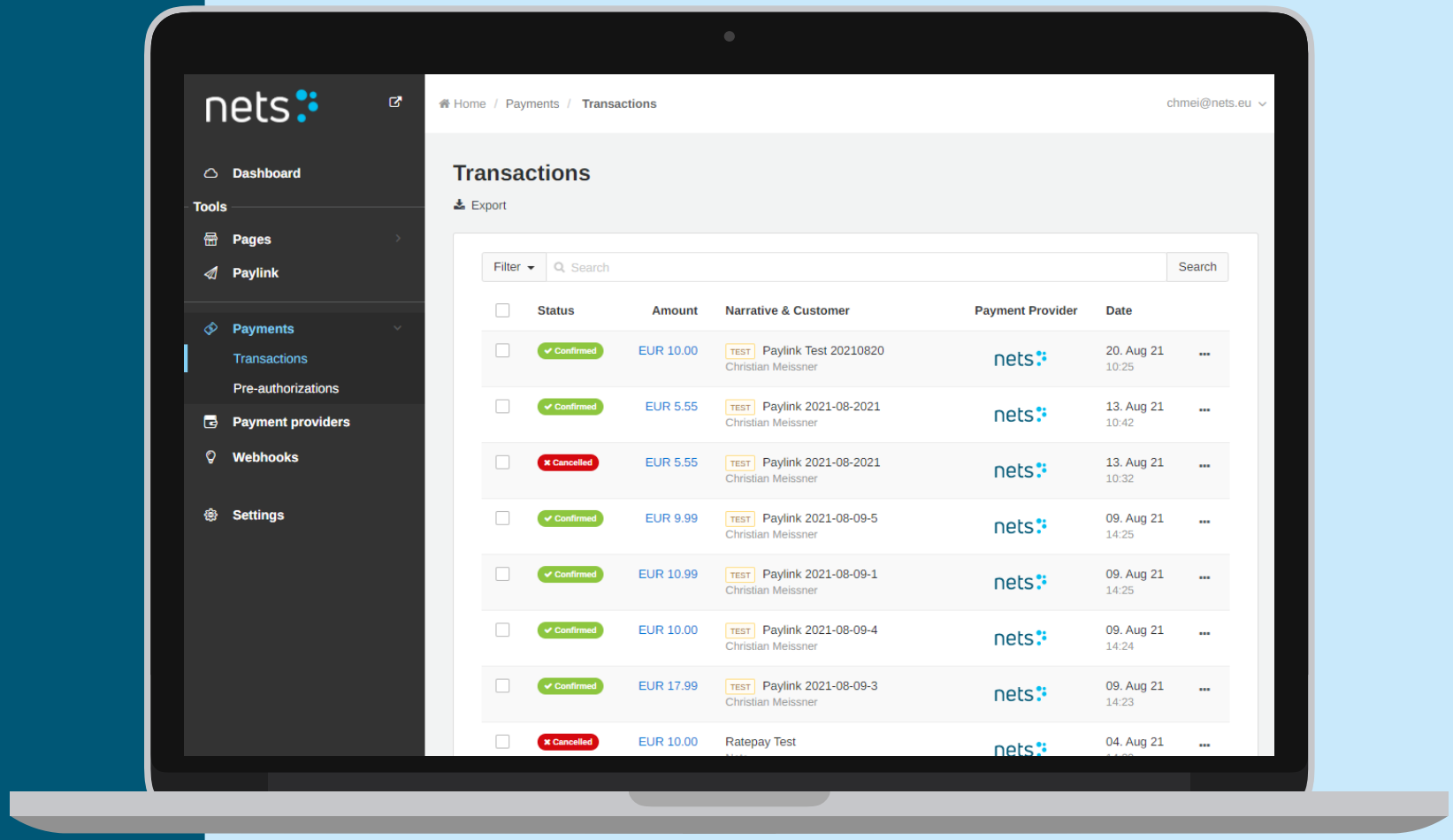
Payments

In this tutorial we show you how to display your payments and corresponding transactions.

easy | nets

Payments

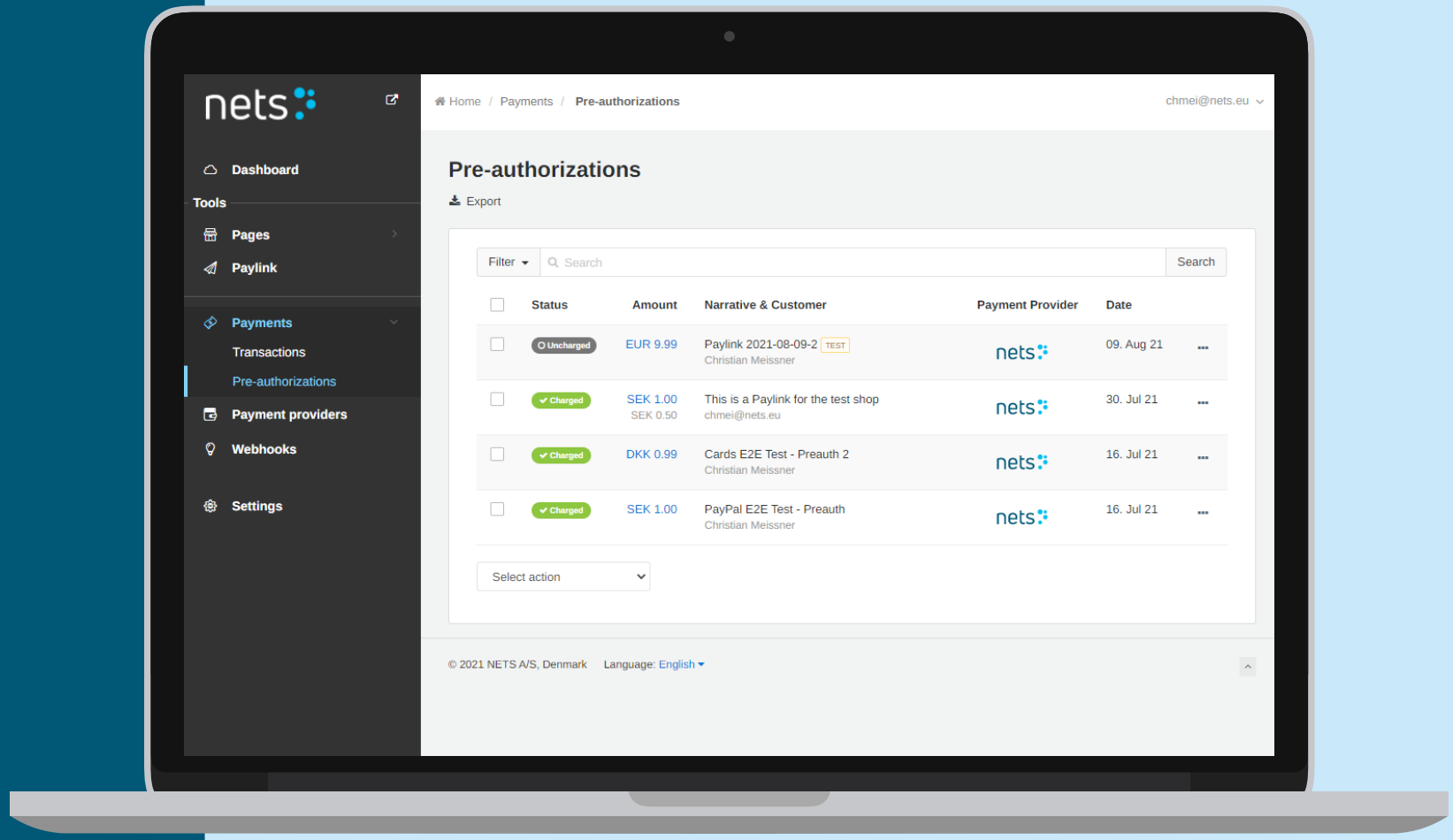
- Via the tab „Payments“ and the sub-menu „Transactions“ all executed payments incl. the corresponding status will be shown.
- This includes transactions where a money flow took place or was initiated.
- You can also search for specific payment transactions using the filter function.
- Results can be exported as an Excel file using the „Export“ menu on the top left side.



easy | nets

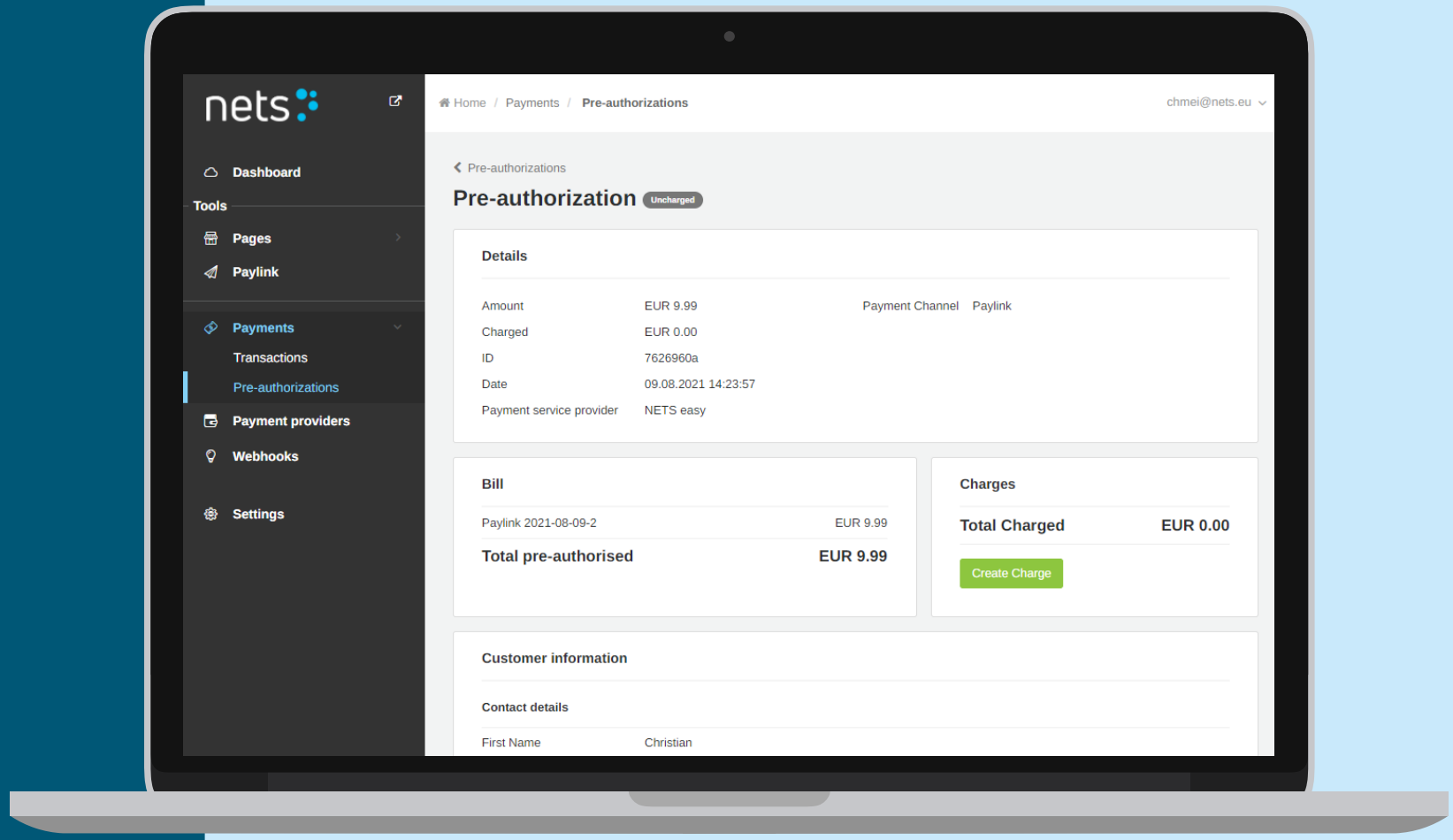
Payments

- Via the tab „Payments“ and the sub-menu „Pre-authorization“ all executed pre-authorizations incl. the corresponding status will be shown.
- You can also search for specific pre-authorization transactions using the filter function.
- Results can be exported as an Excel file using the „Export“ menu on the top left side.



Payments

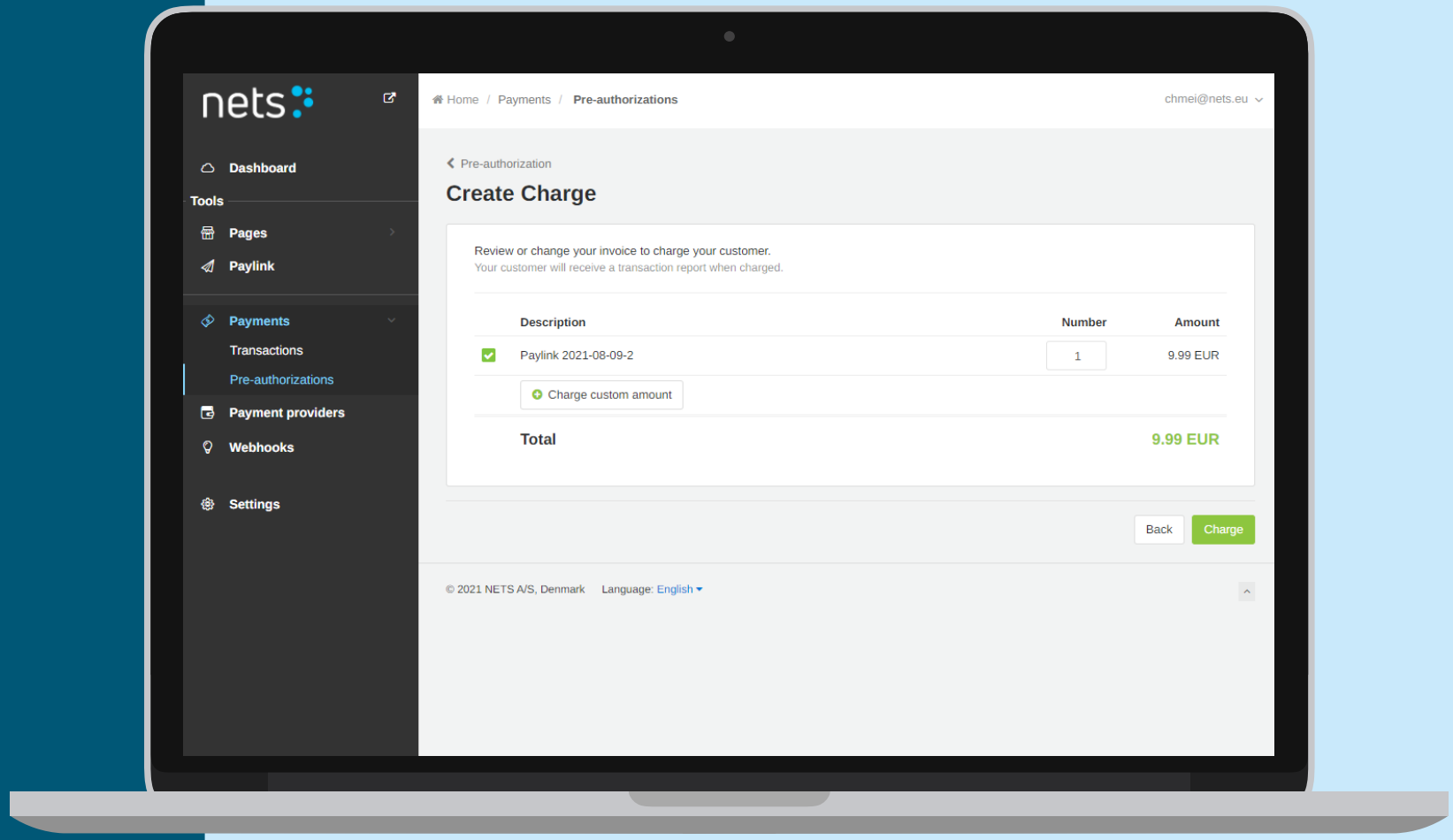
- Successful pre-authorizations can be charged via the Paylink portal.
- If you click on the desired pre-authorization the corresponding detail page will open.
- Via the green „Create Charge“ button you can initiate a charge.



easy | nets

Payments

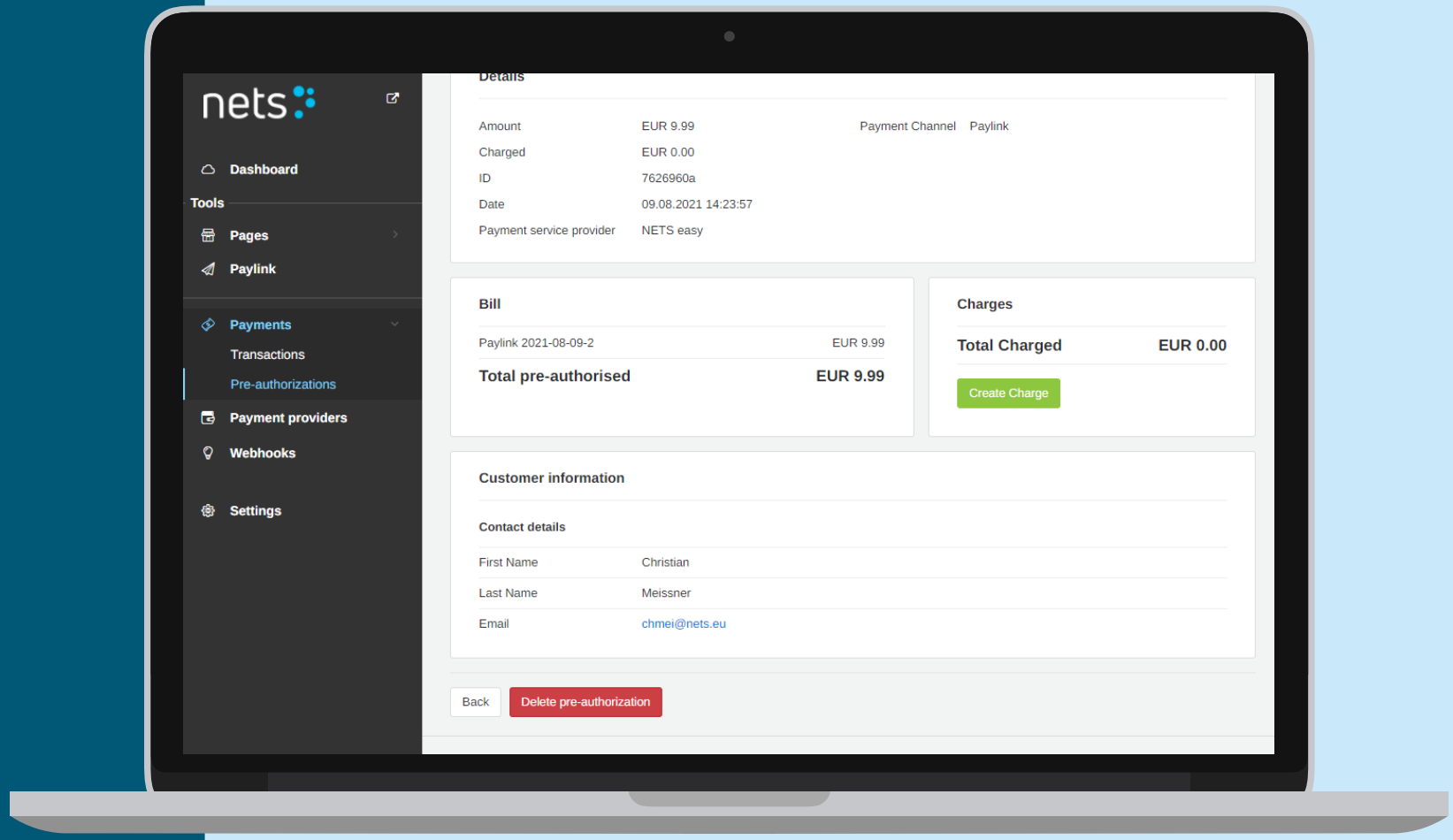
- You can either charge the pre-authorizated amount or only a partial amount.
- For a partial charge select the „Charge custom amount“ option.



easy | nets

Payments

- Successful pre-authorizations can also be canceled via the red „Delete pre-authorization“ button.

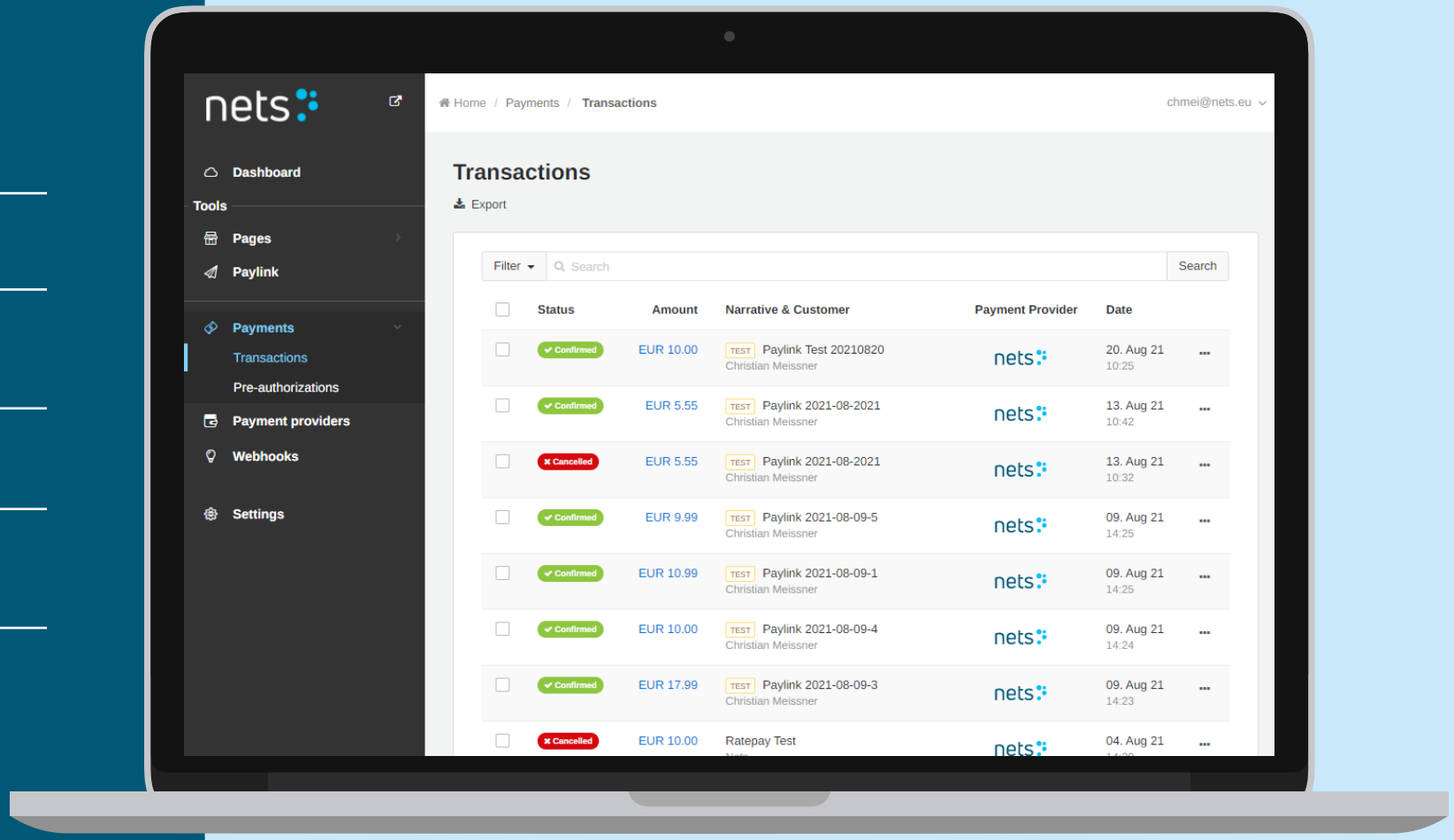


easy | nets

Transactions

Legend status/colors:

Color	Description
green	payment confirmed
blue	payment refunded / partially refunded
orange	refund pending
red	payment declined or cancelled
grey	uncharged pre-authorization



easy | nets

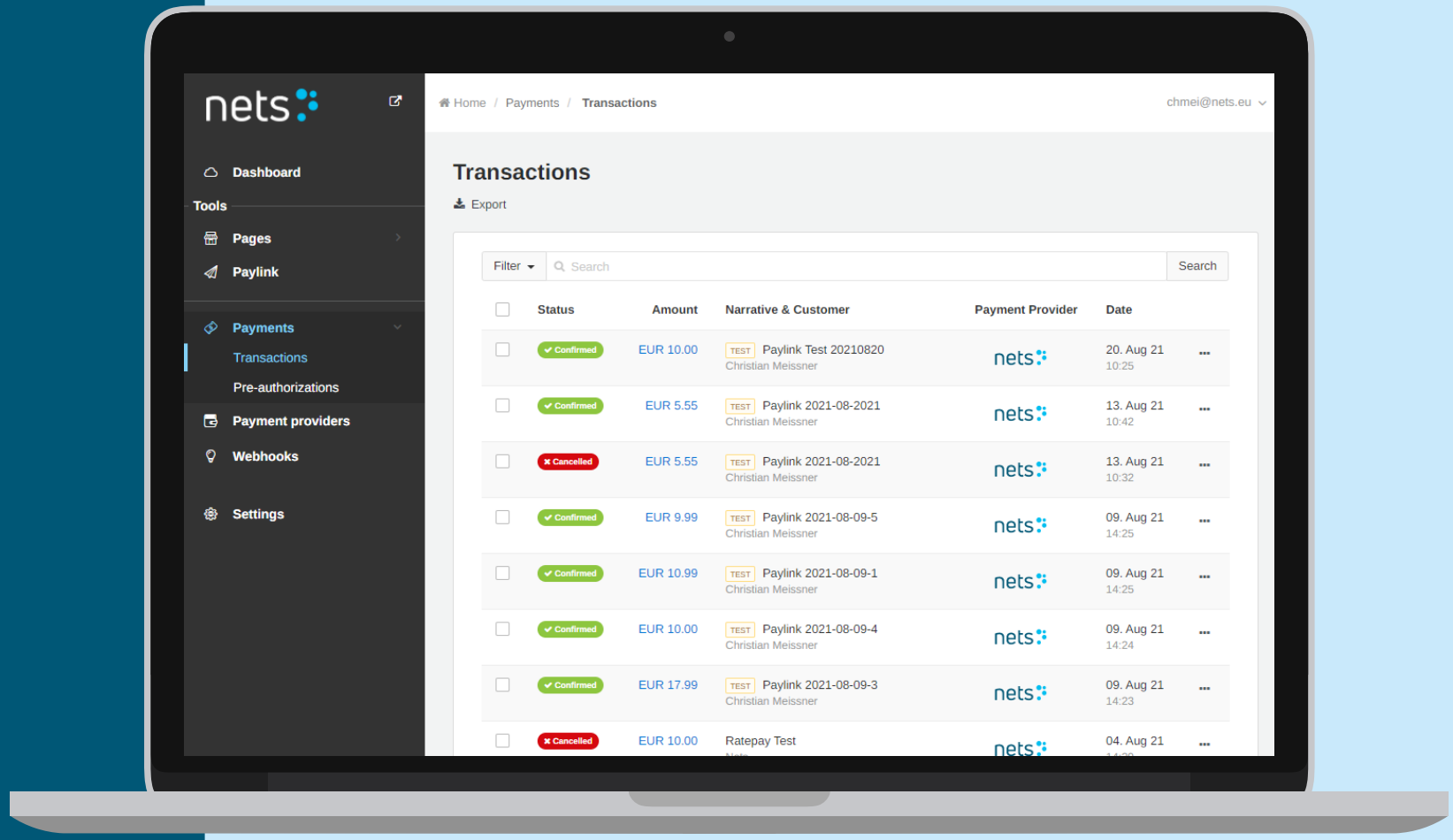
Refund

In this tutorial we show how to initiate a refund in 3 steps.

easy | nets

Refund

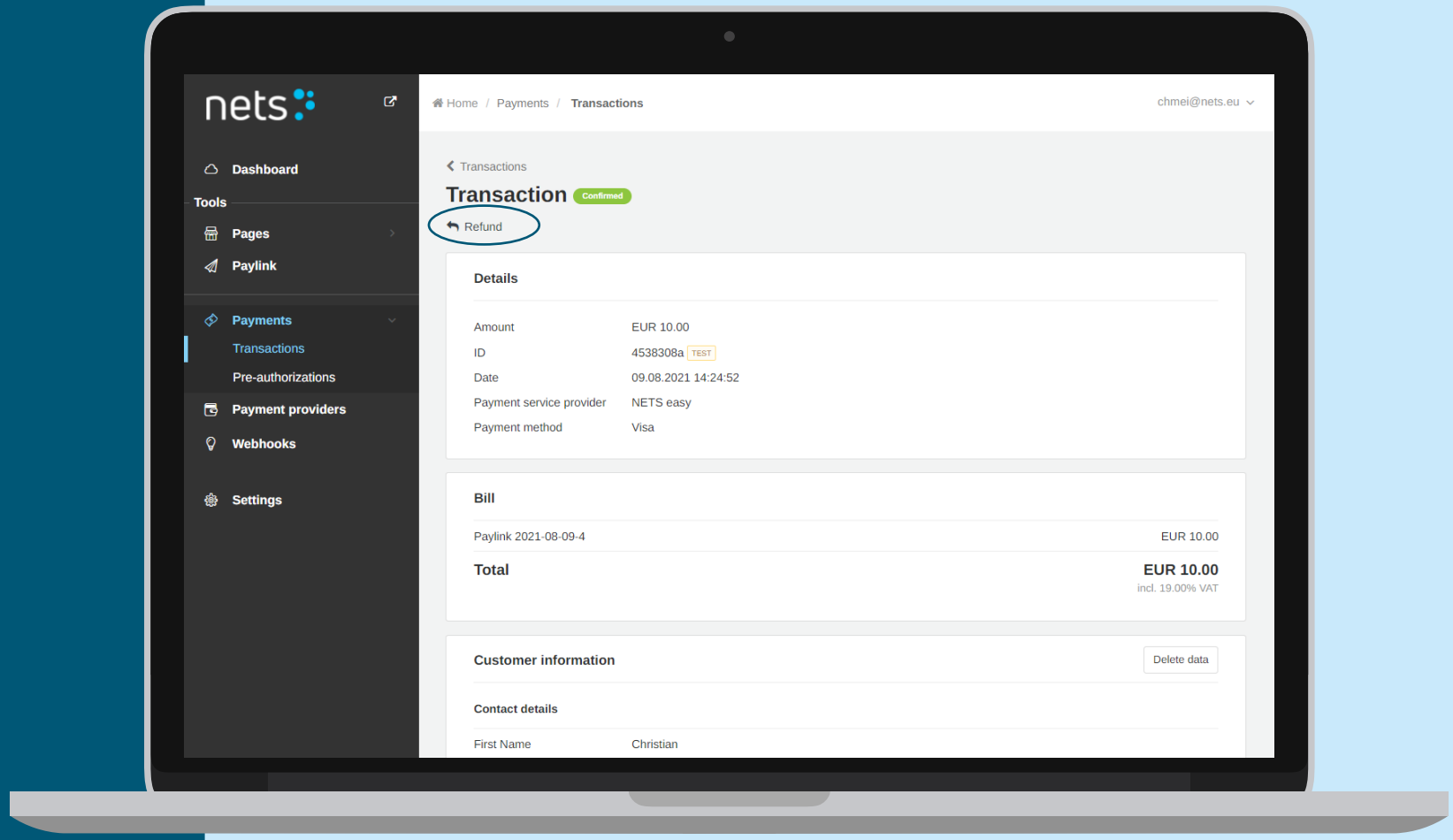
- Click on a successful transaction you would like to refund.



easy | nets

Refund

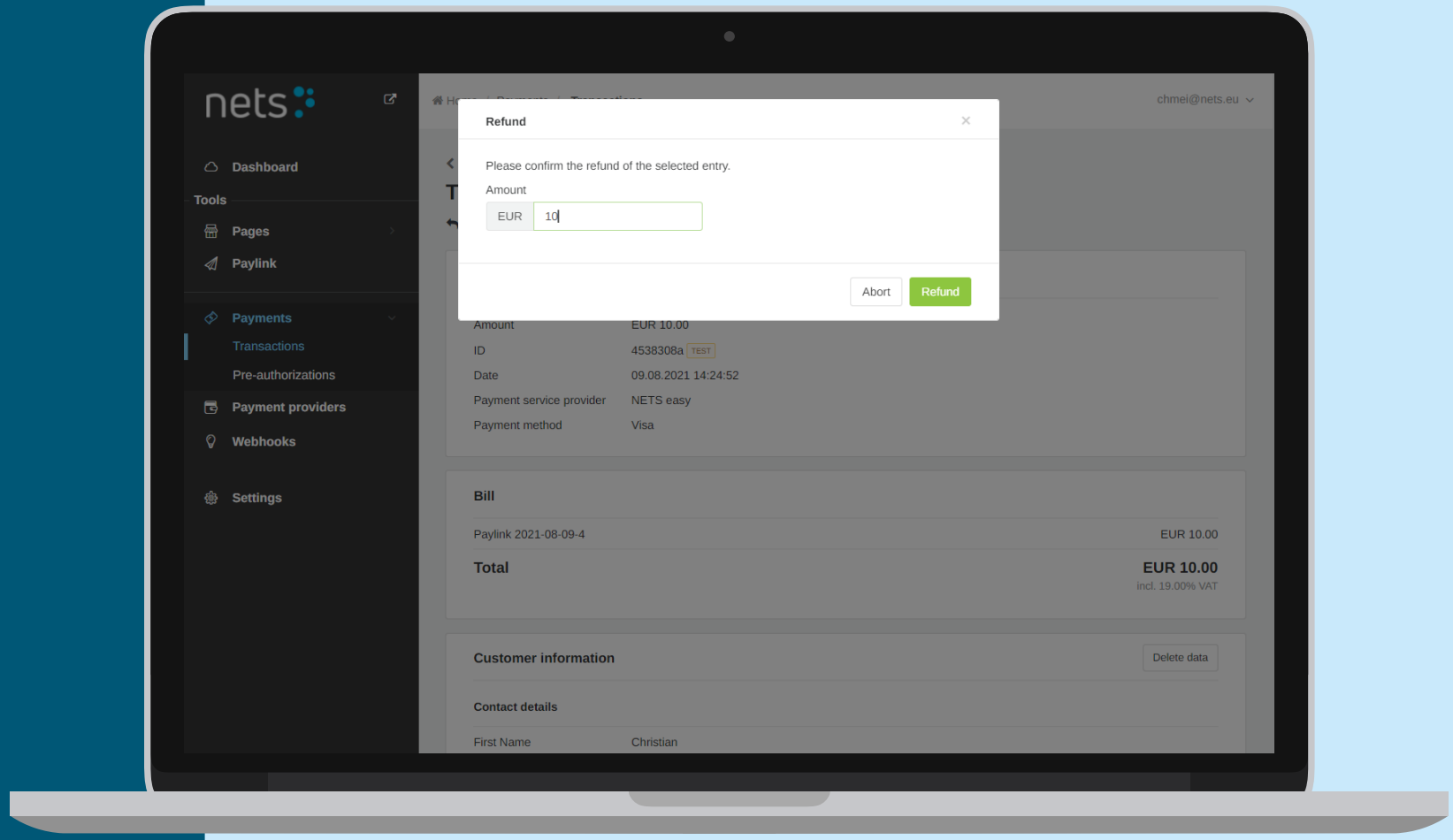
- Click on „Refund“.



easy | nets

Refund

- Enter the amount you would like to refund.
- Note: You can either refund the full amount or only part of it.
- Then click on the „Refund“-button to complete the refund.



easy | nets

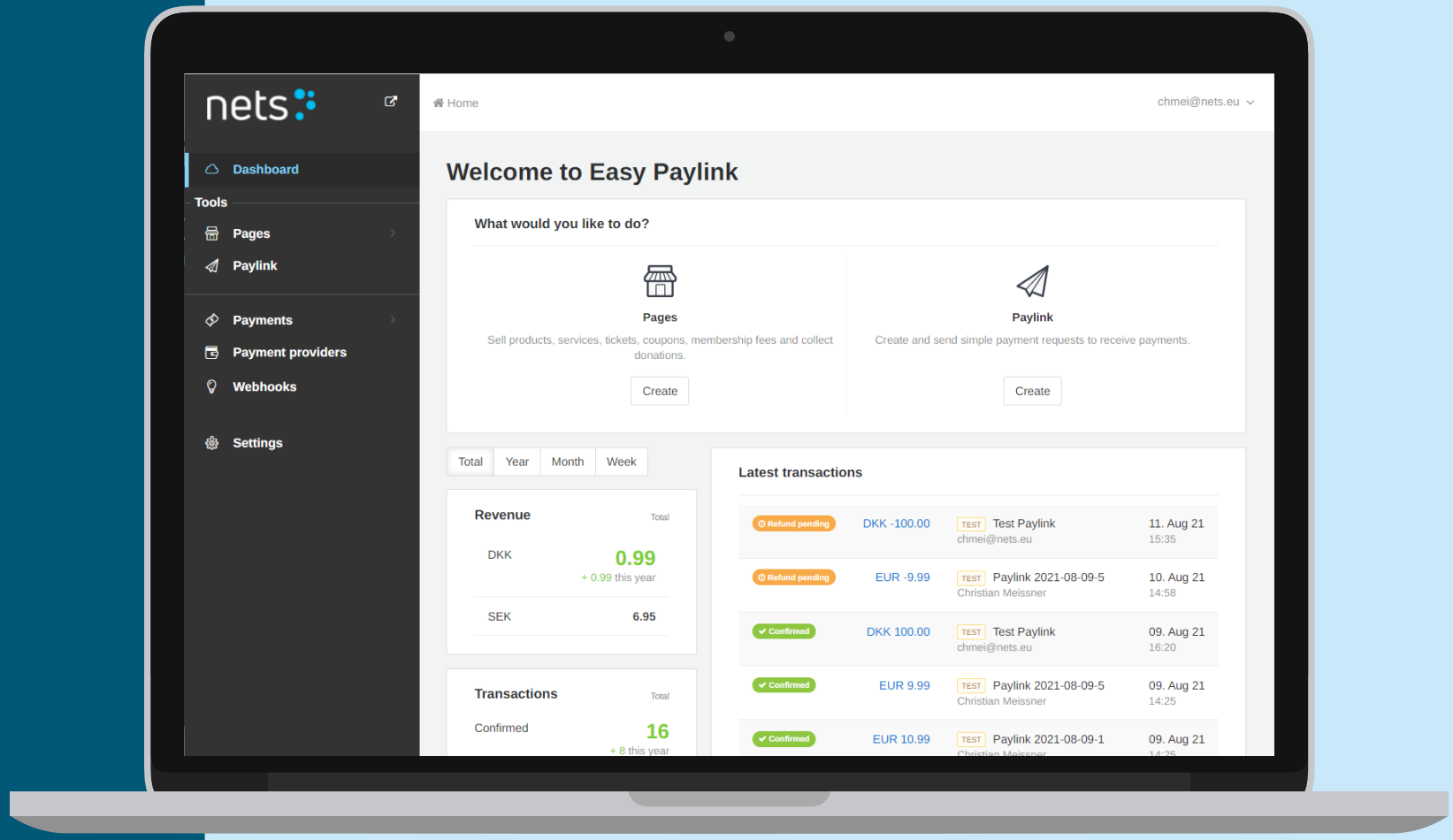
Add user

In this tutorial we show you how to create a new user.

easy | nets

Add user

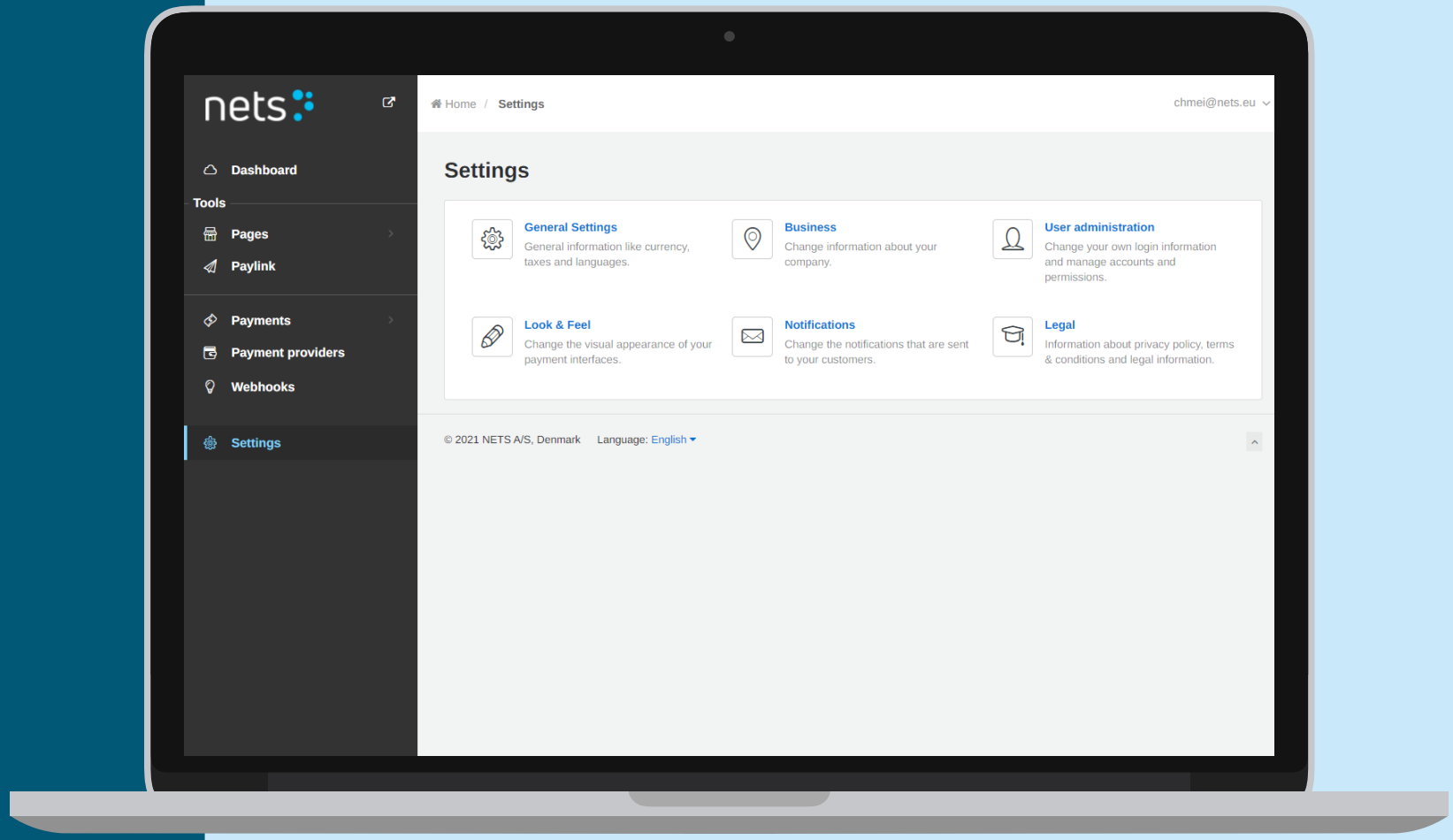
- Click on the „Settings“-tab on the left.



easy | nets

Add user

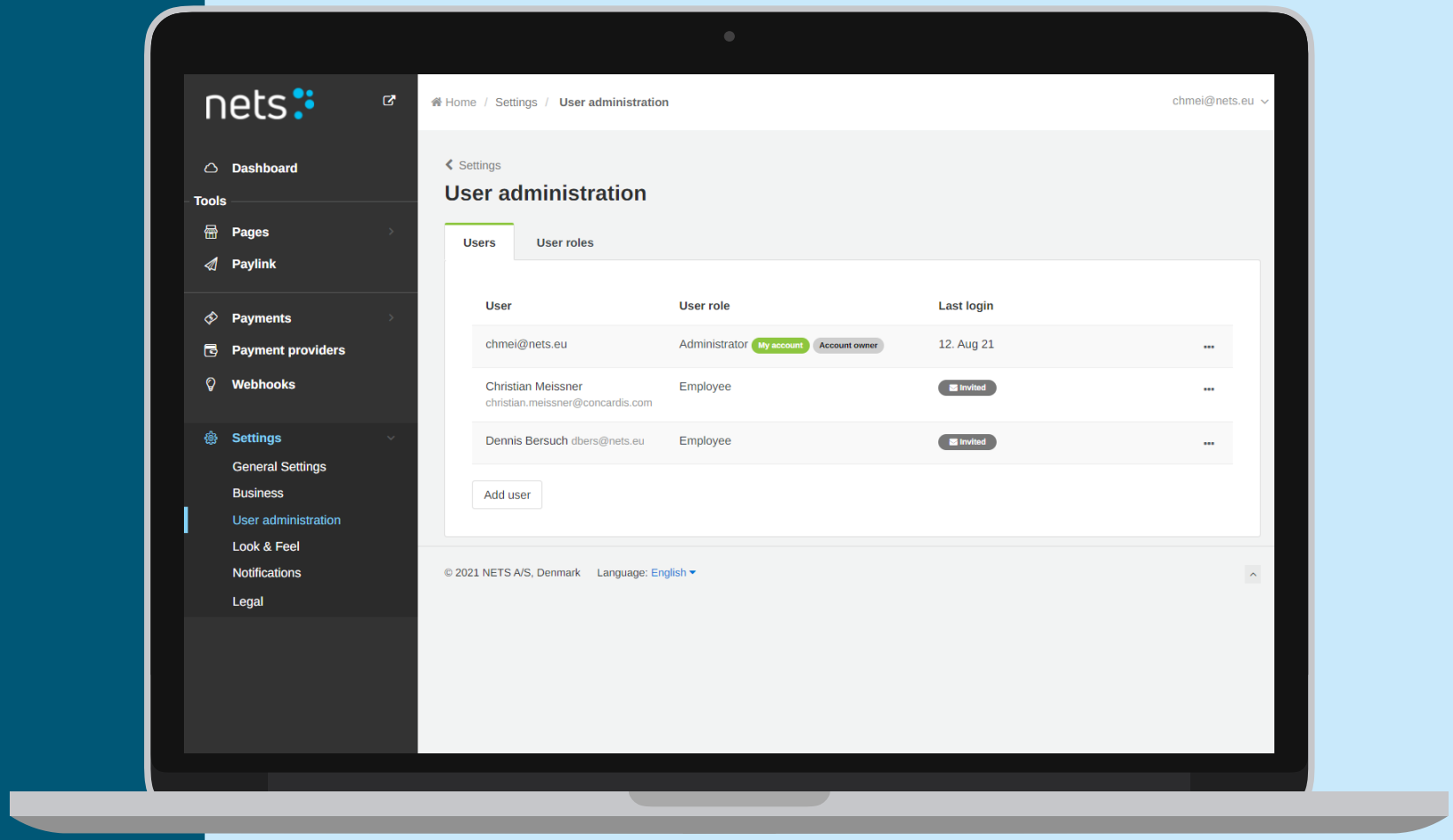
- Click on the „User Administration“-field.



easy | nets

Add user

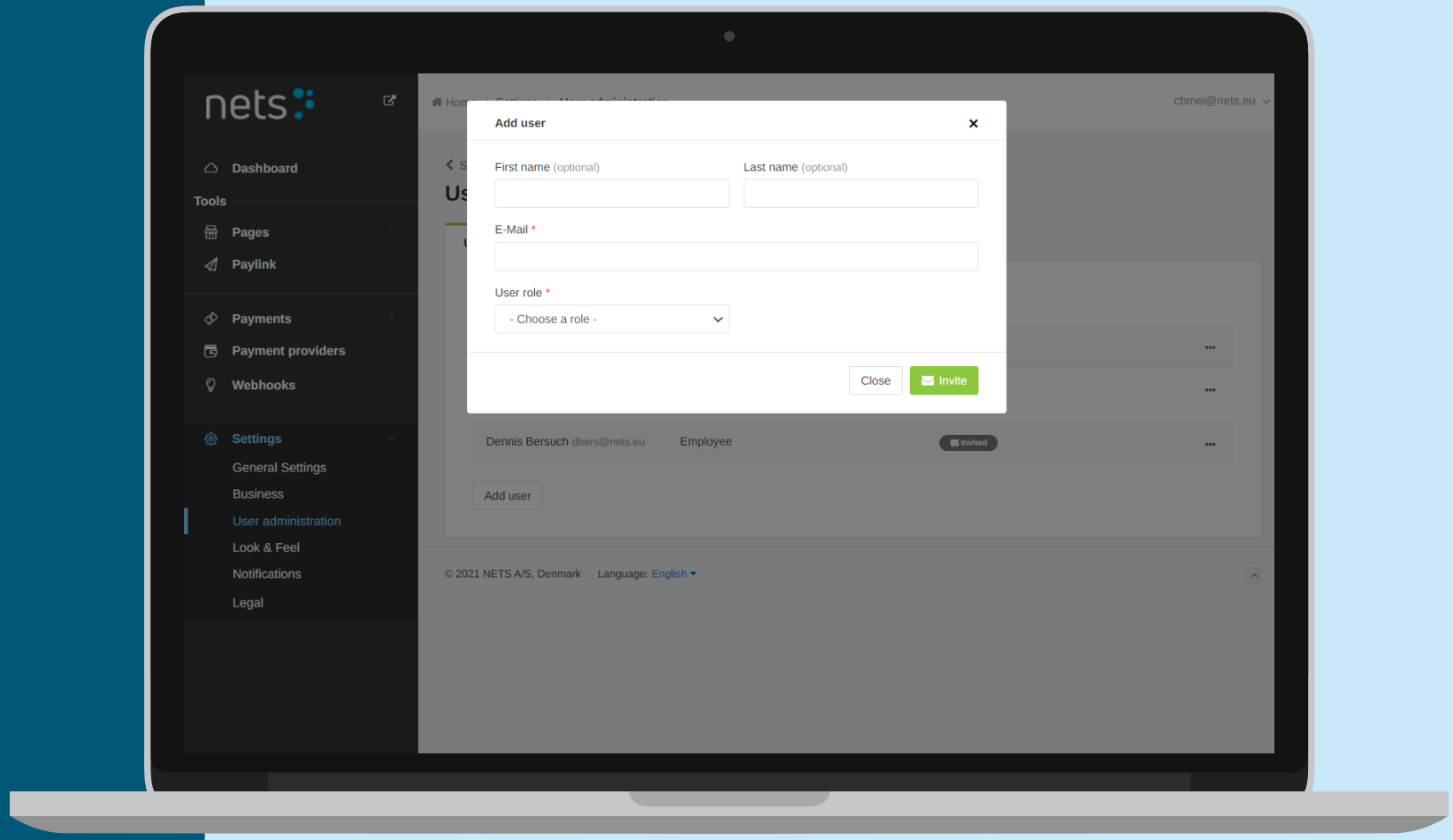
- Click on the „Add user“-button to create a new user.



easy | nets

Add user

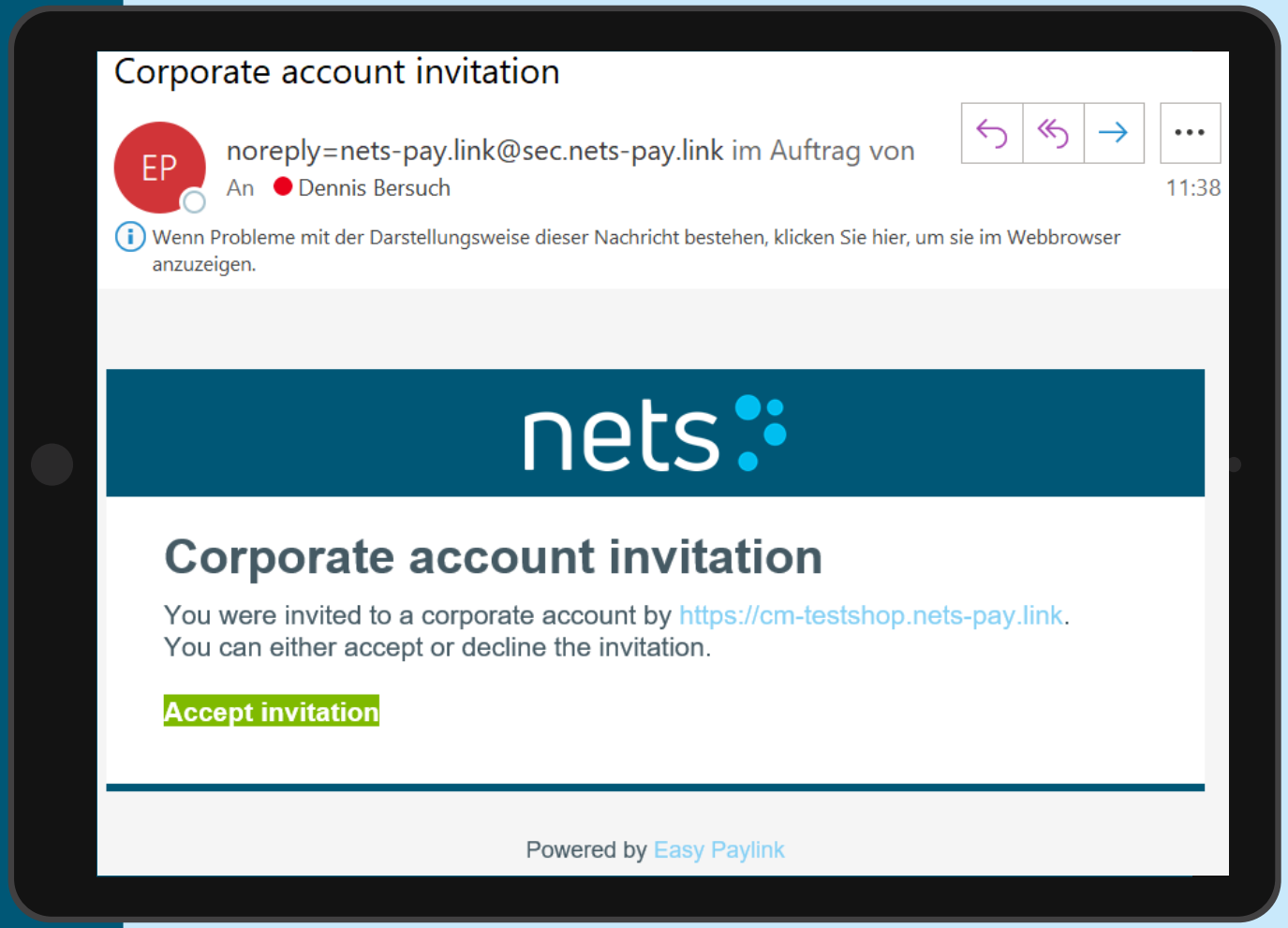
- Fill in all information about the user and click on the green „Invite“-button.



easy | nets

Add user

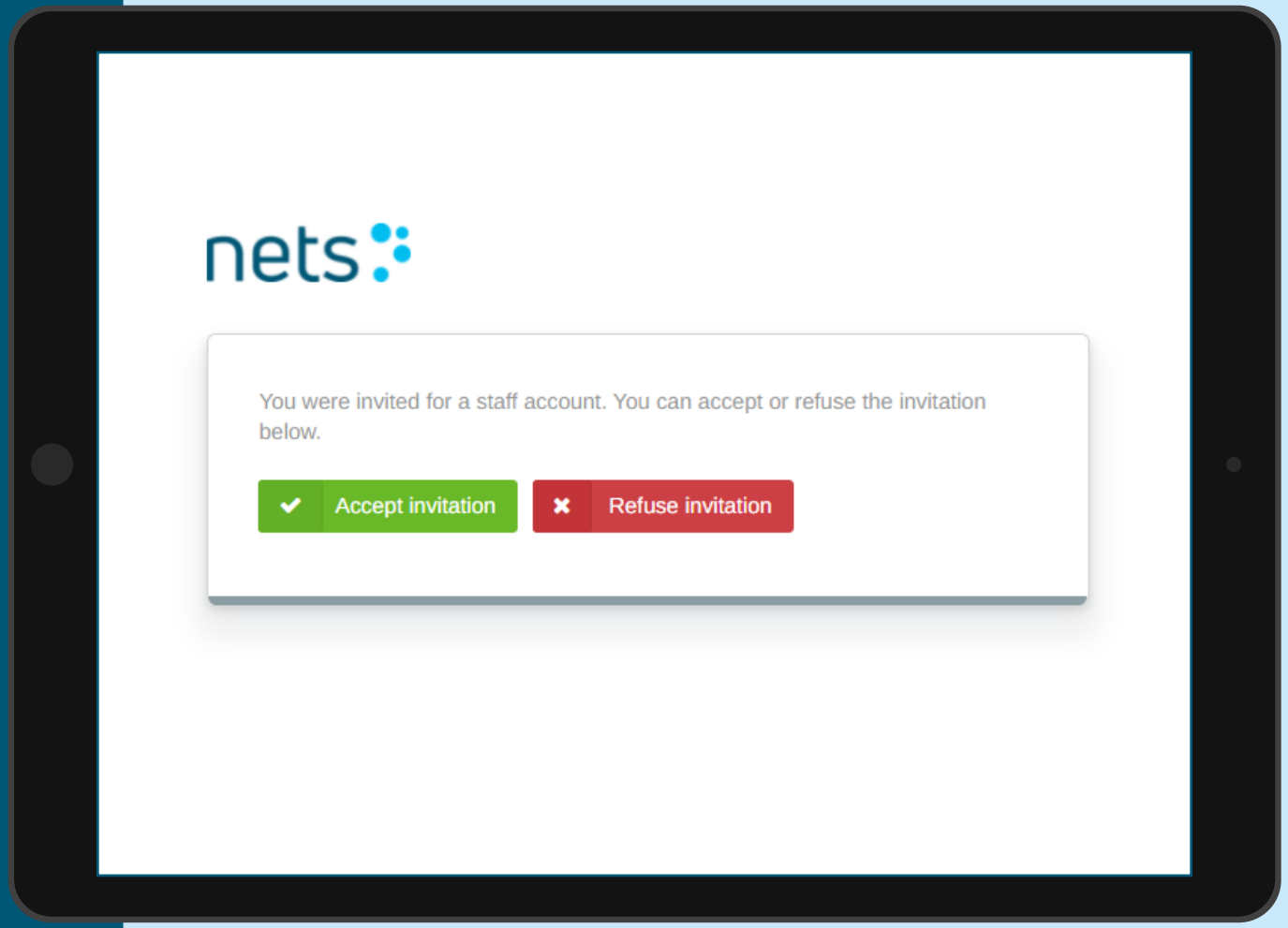
- This is how the mail looks like for the user who was invited.
- The user has to click on the green „Accept invitation“ button.
- If the invited person does not yet have a paylink account it will be created.



easy | nets

Add user

- In the opened browser window the user can accept the invitation by clicking on the green „Accept invitation“-button.
- The invited user will be asked to create a new password.



easy | nets