



# Paylink Tutorials

23/08/2021

version 1.0

# Paylink

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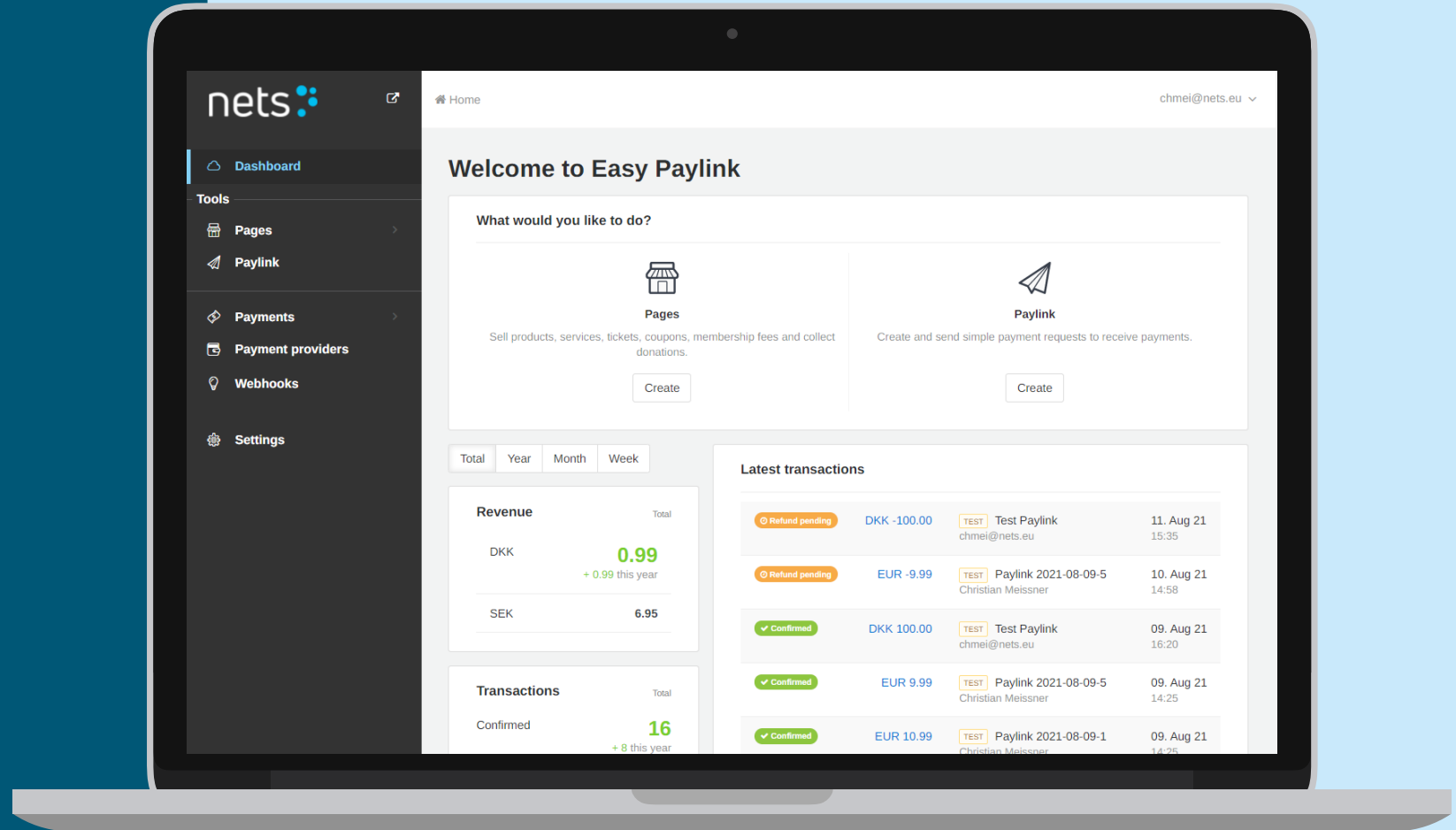
## ● Look & Feel

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

# Look & Feel



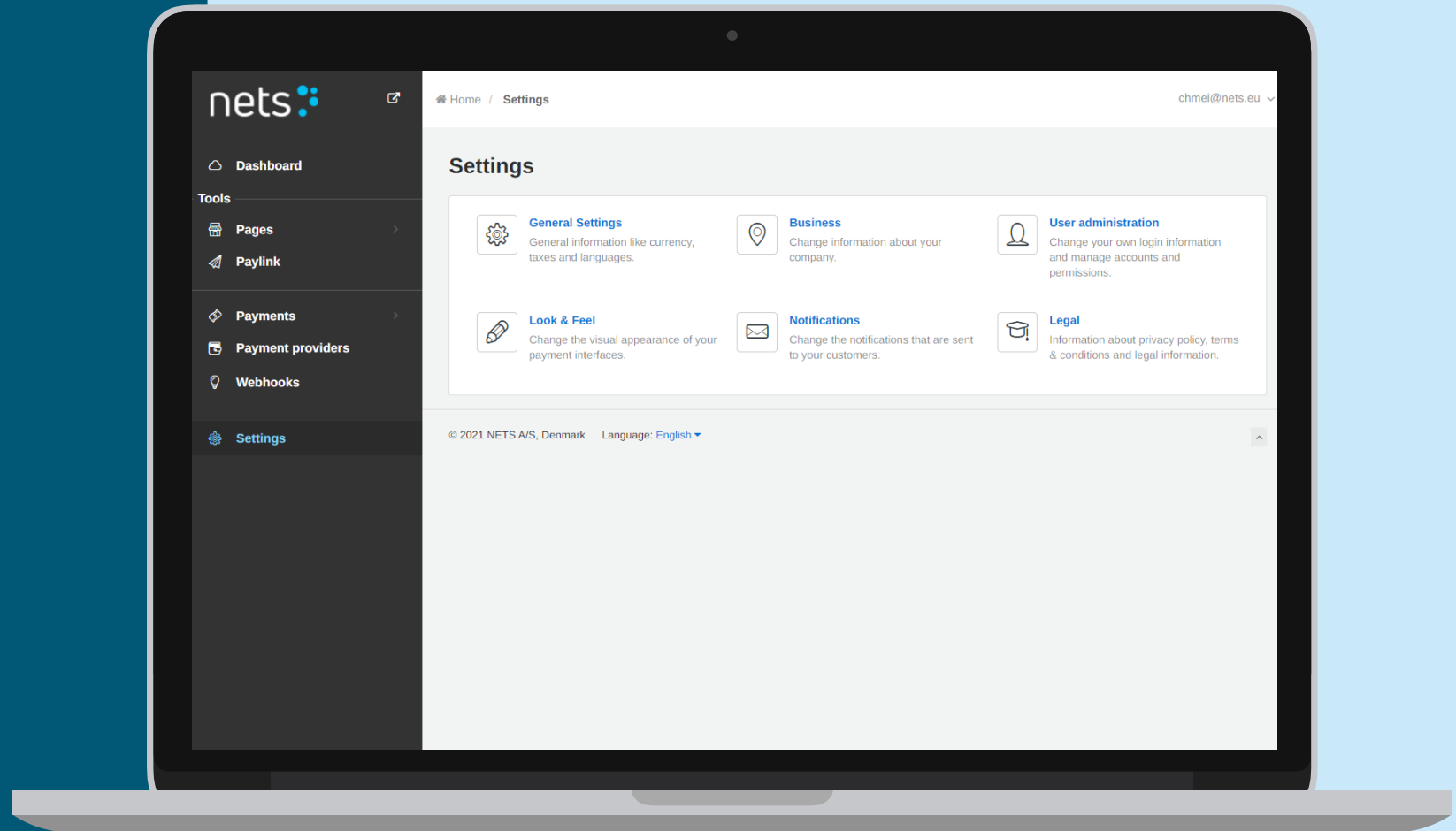
- Click on the „Settings“ tab on the left



# Look & Feel



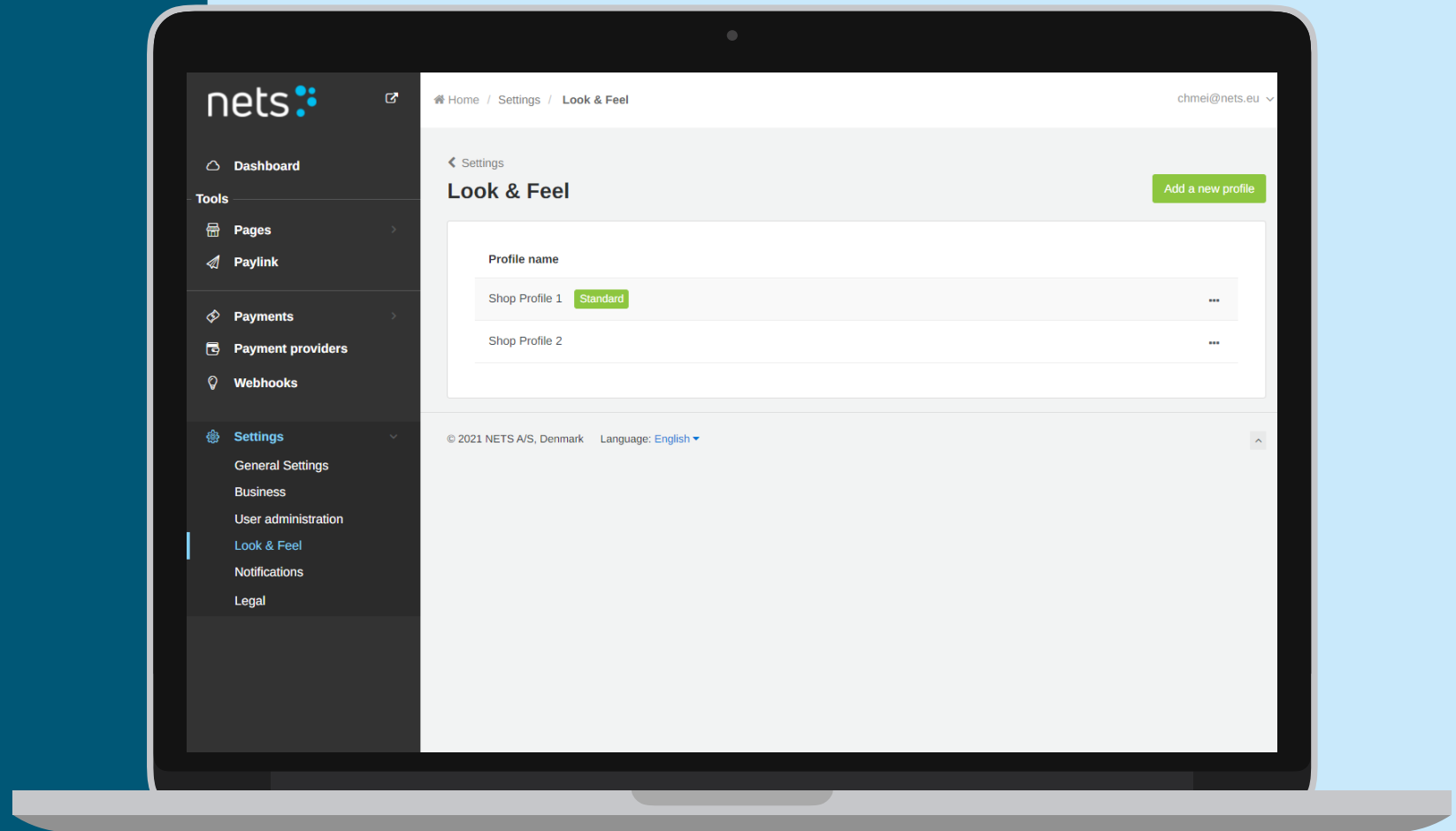
- Click on the „Look & Feel“ menu



# Look & Feel



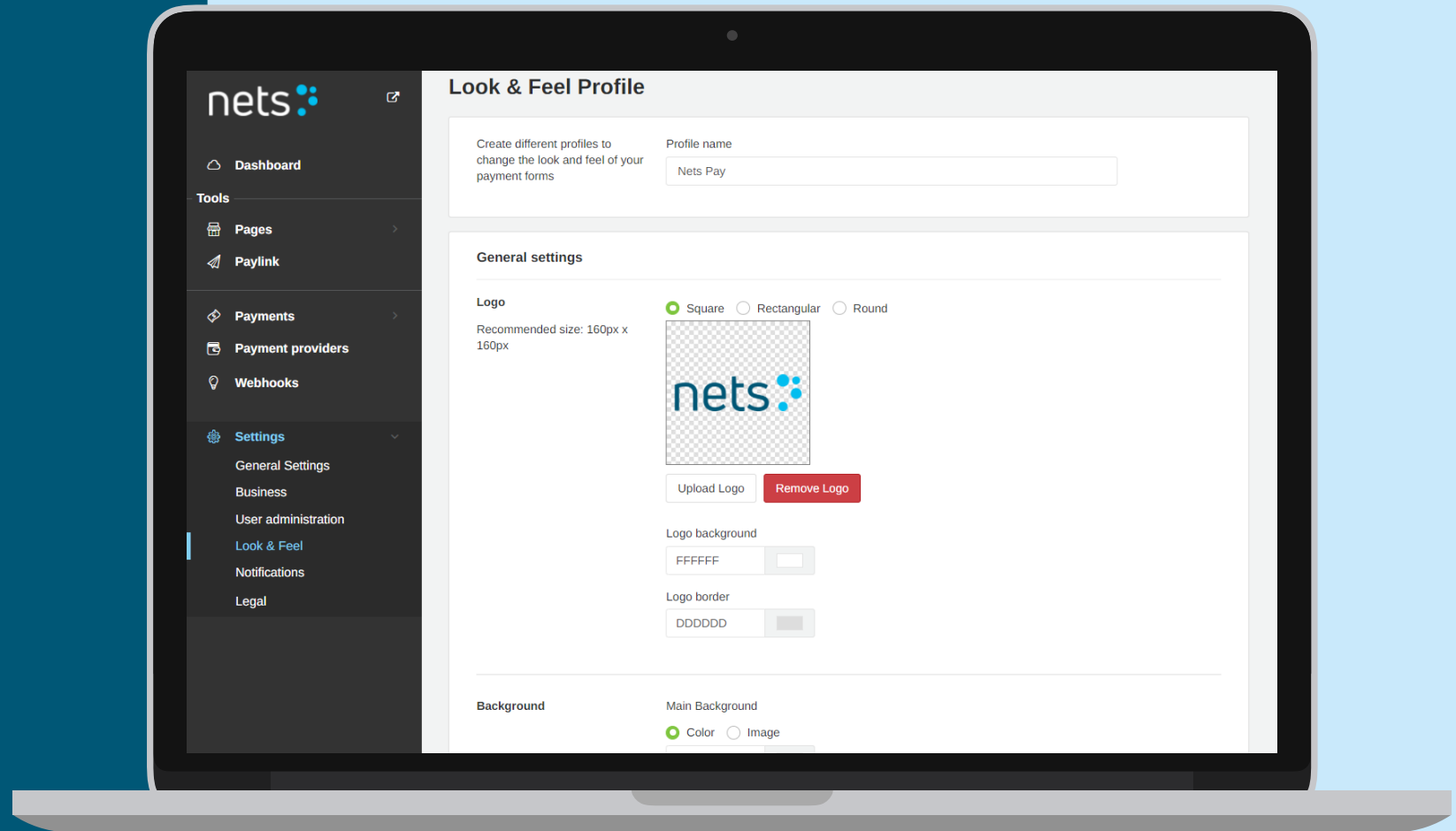
- Click on the green „Add a new profile“-button.



# Look & Feel



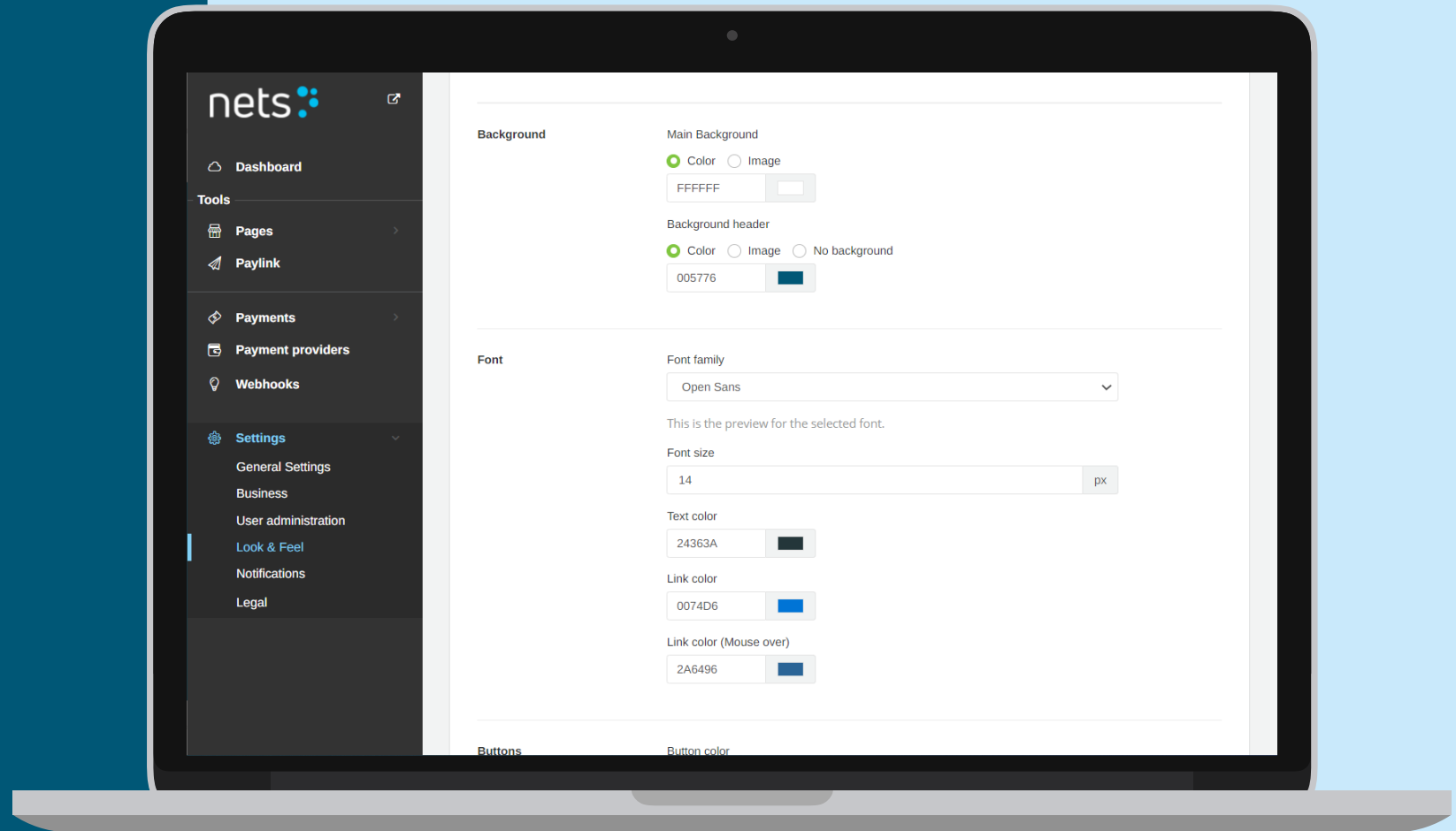
- Enter a profile name. This will be visible only for you in the backend.
- To add a logo, click on the „Upload Logo“ button.
- You can also choose whether your logo should have a square, rectangular or round frame.
- Additionally you can choose the color and the fill color of the frame.



# 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.

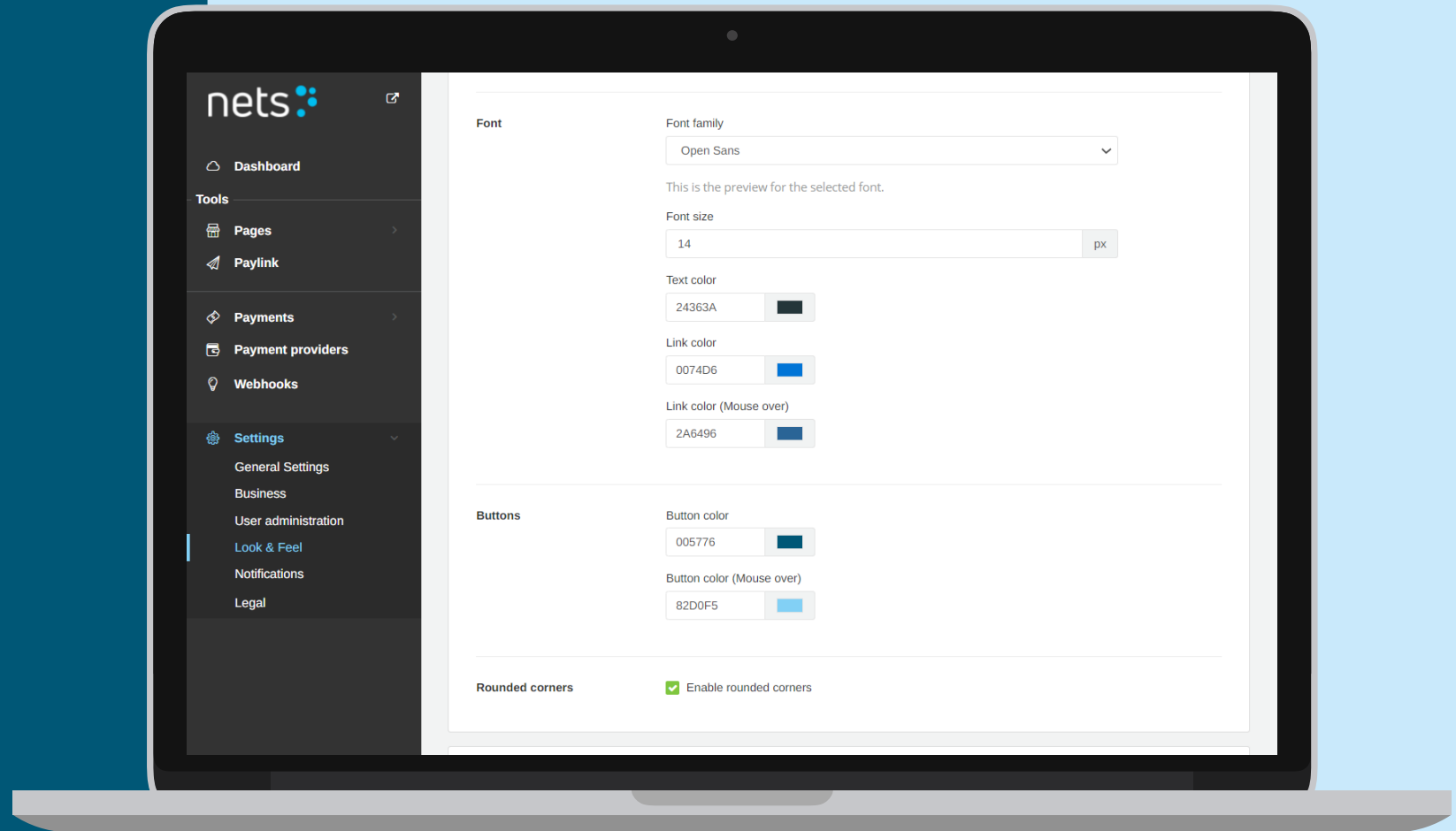




# Look & Feel



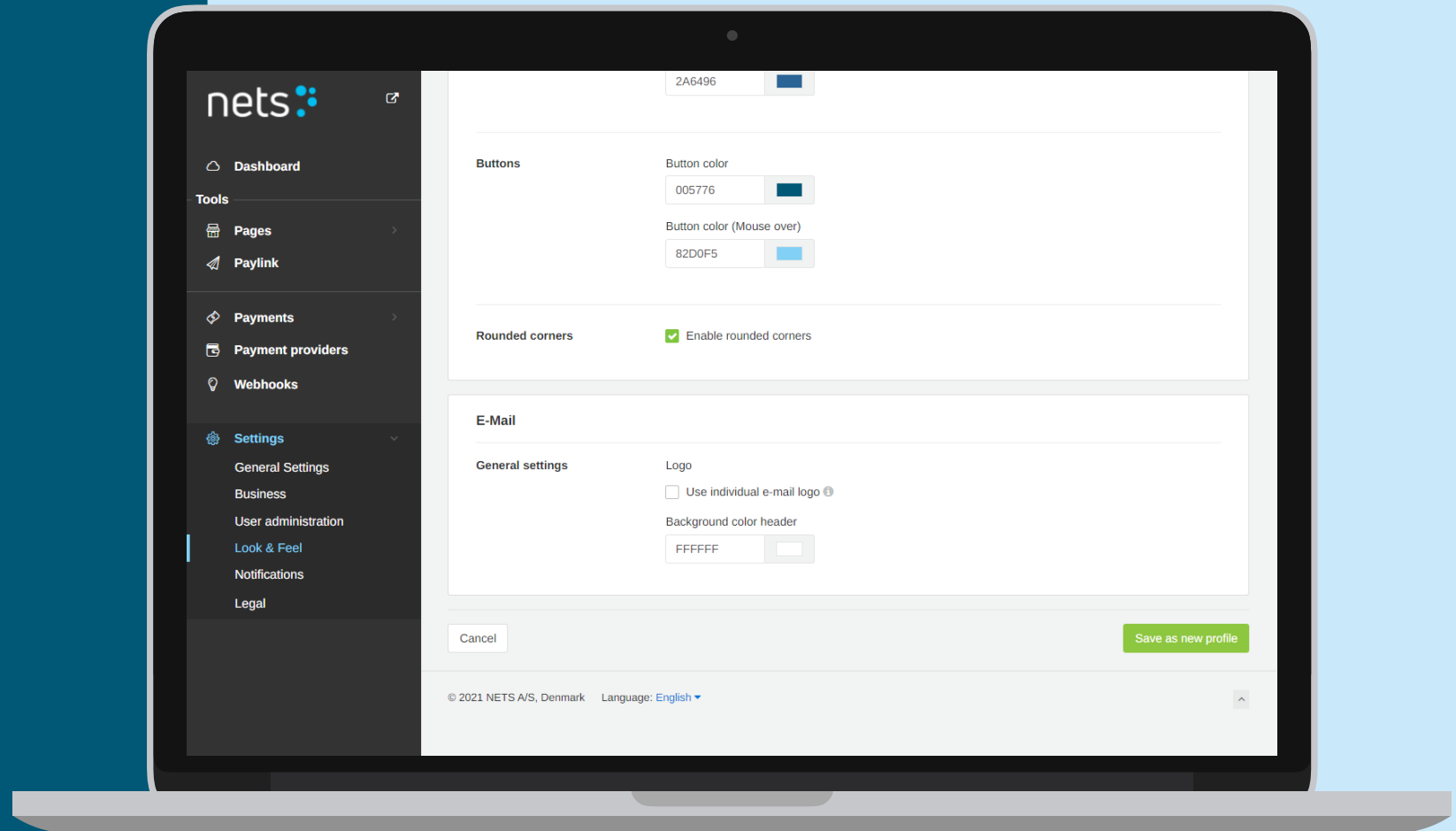
- Select your font, font size and font color. You can define the text color for the terminal separately
- Choose a link and button color. In addition, you can choose the color that the button or link should take on as soon as you move the mouse over it.



# 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.





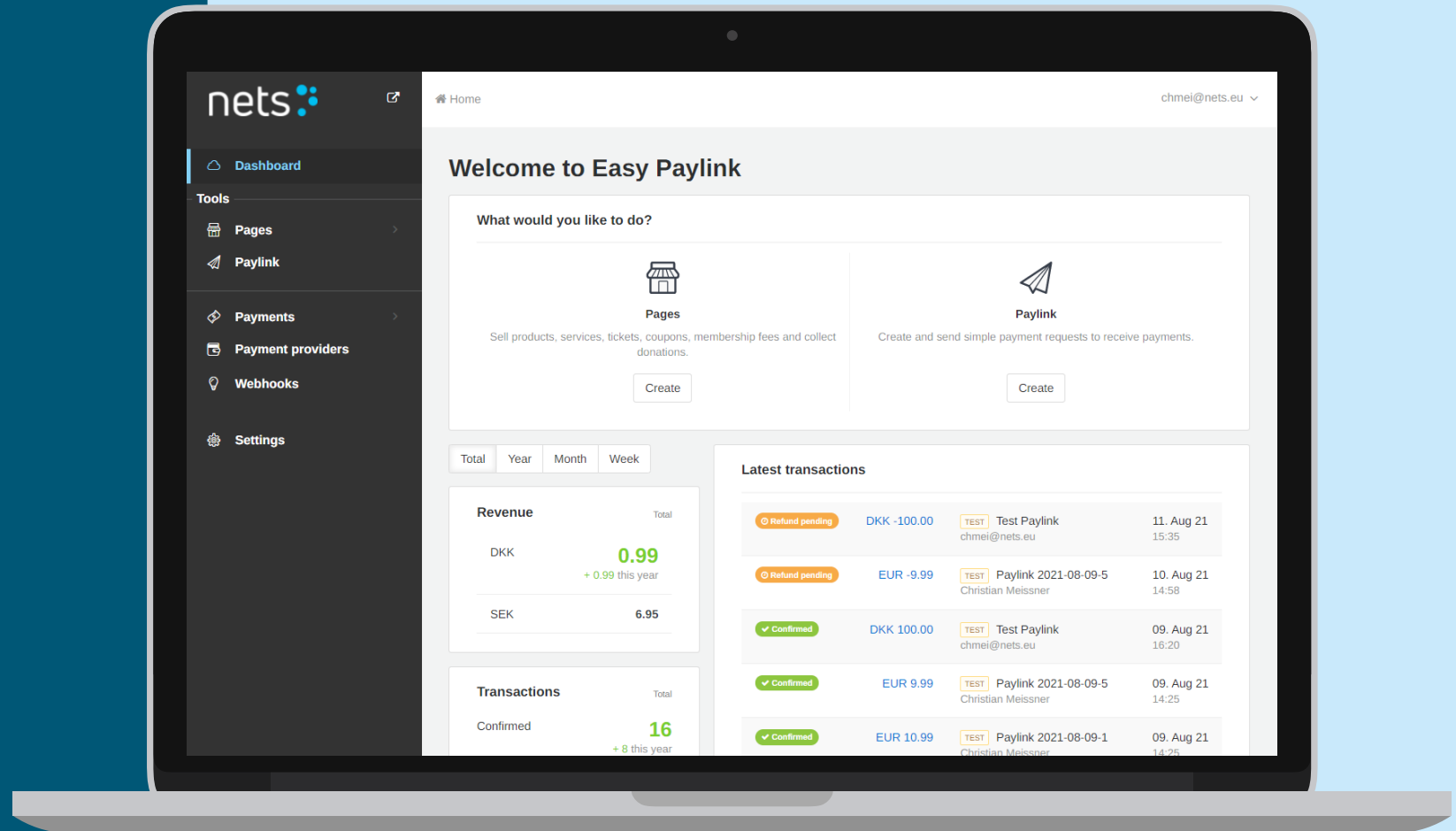
## ● Create a Paylink

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

# Create a Paylink



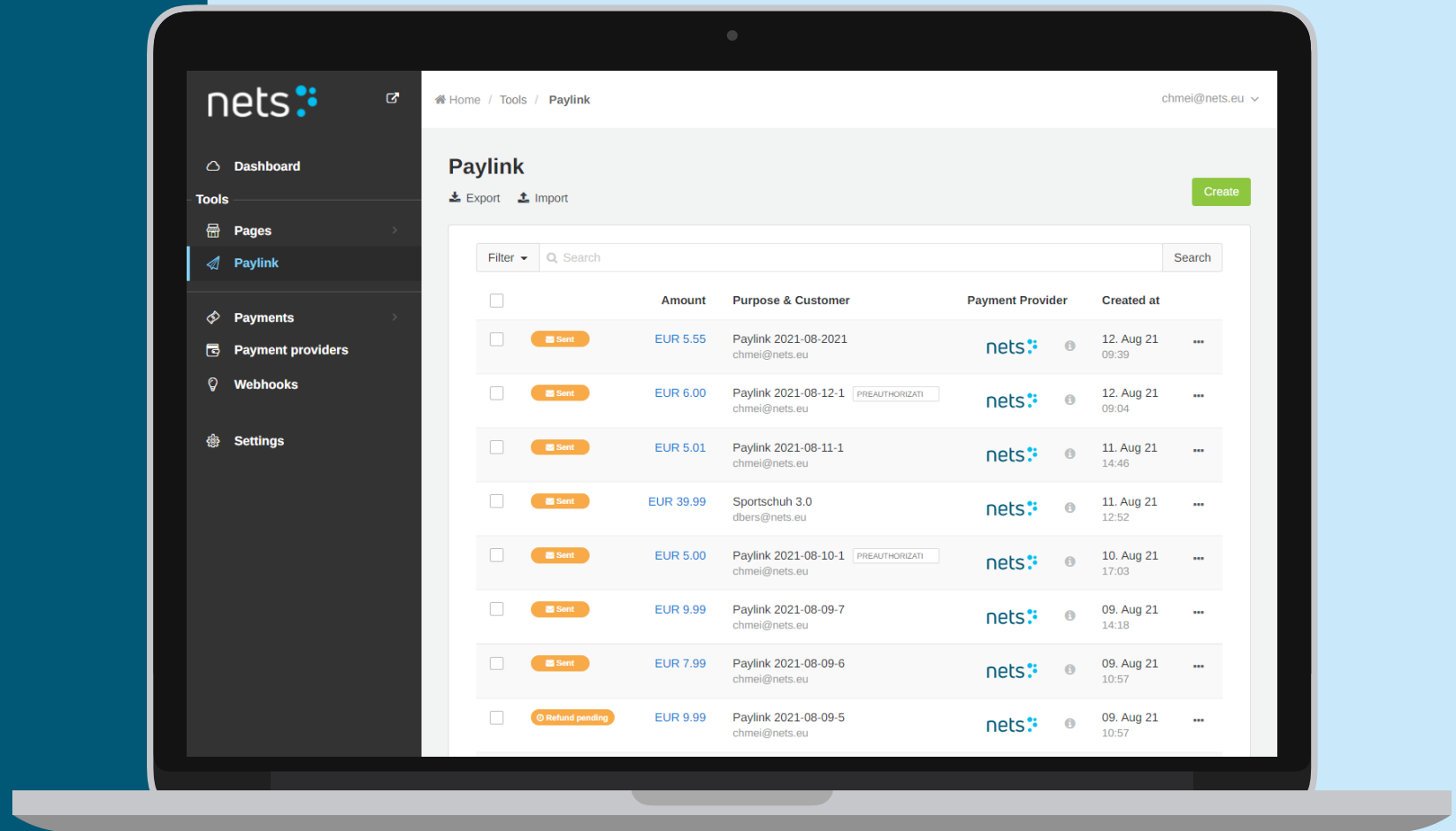
- Click on the „Paylink“ tab on the left.



# Create a Paylink



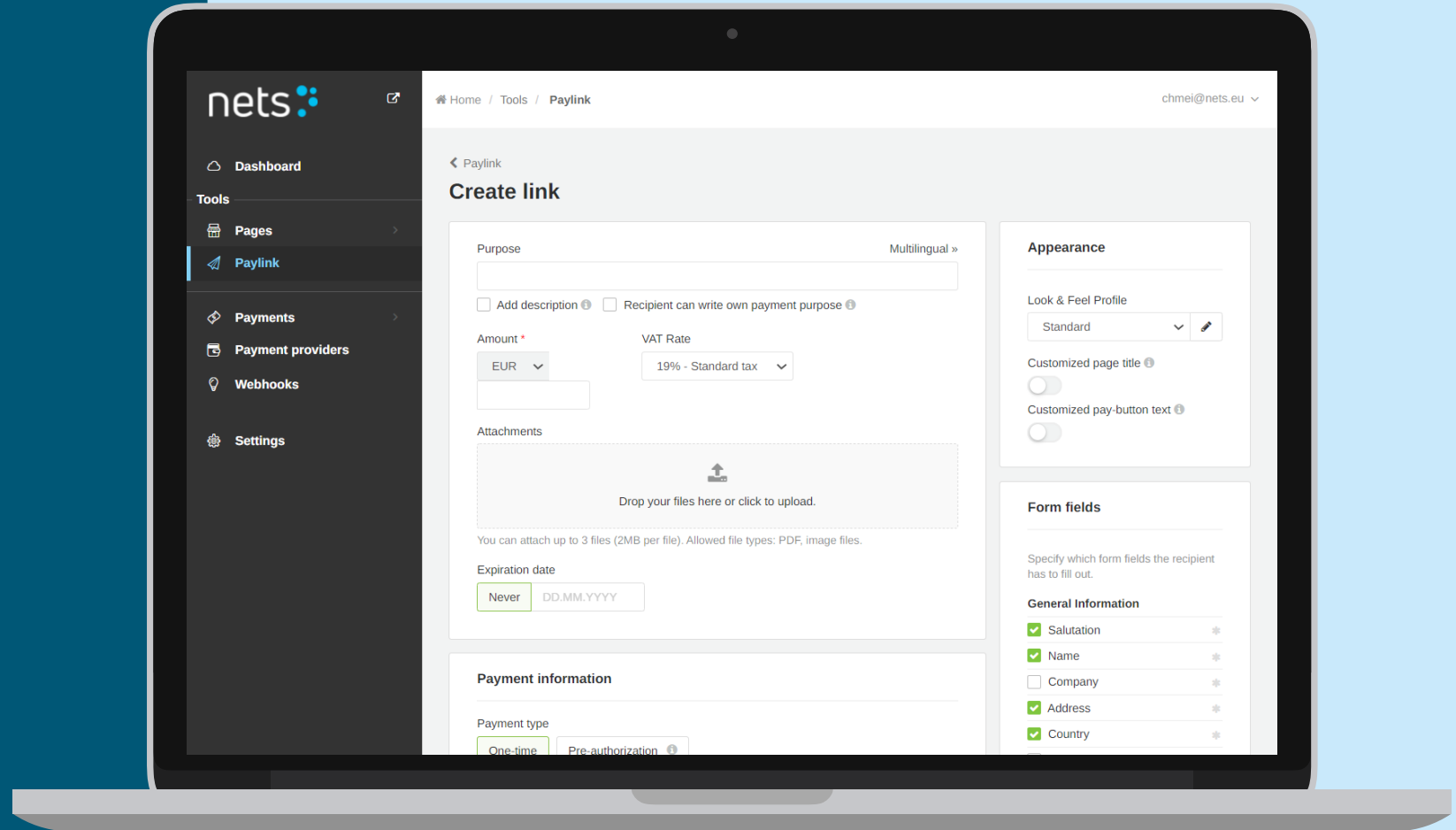
- Afterwards an overview with all existing paylinks will be opened.
- To create a new paylink click on the green „Create“-button



# Create a Paylink



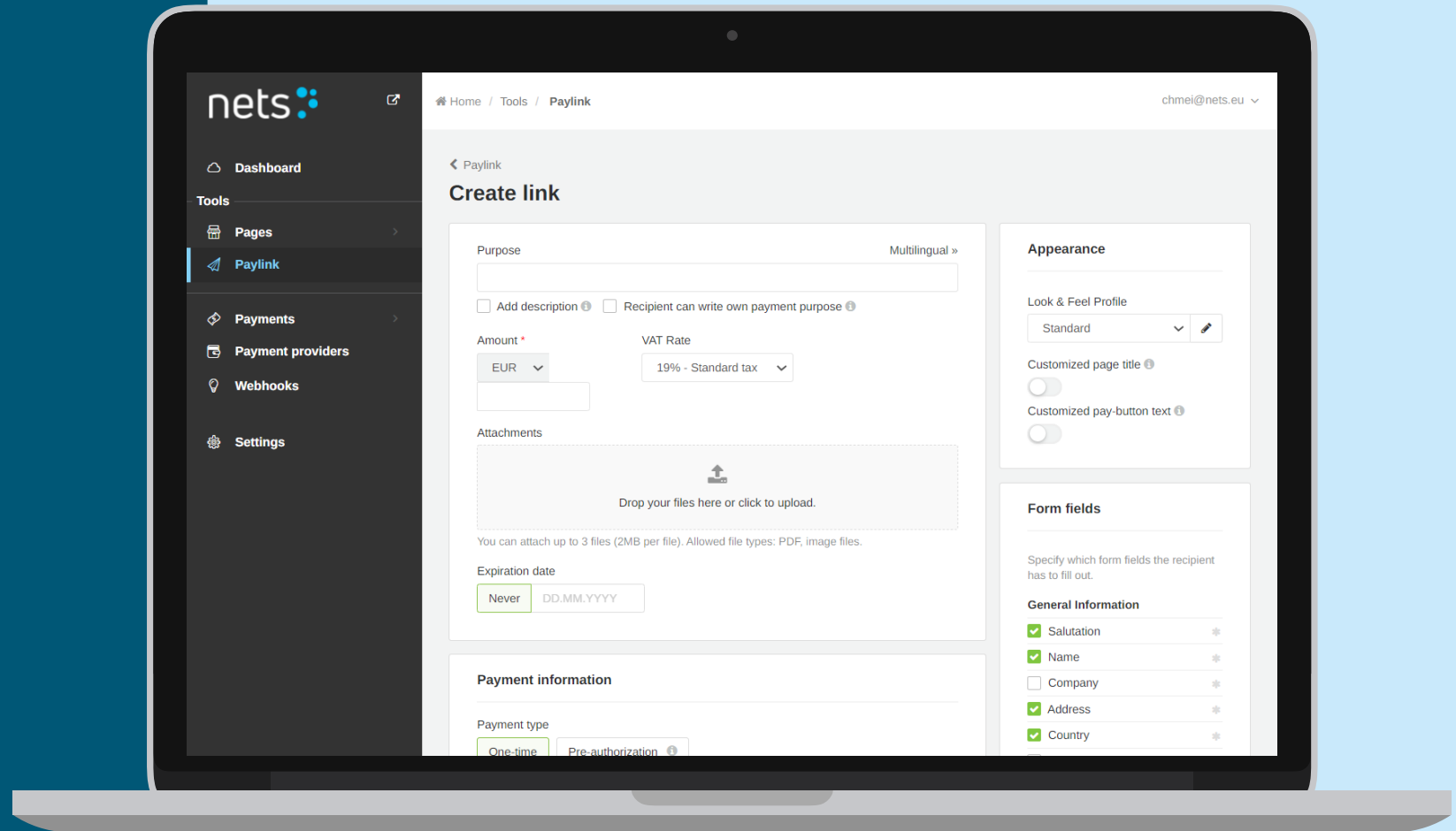
- Define the purpose of your paylink.
- Specify the amount to be paid.
- Choose between a one-time payment or pre-authorization payment.
- Specify the recipient. It is also possible to enter several recipients.



# Create a Paylink



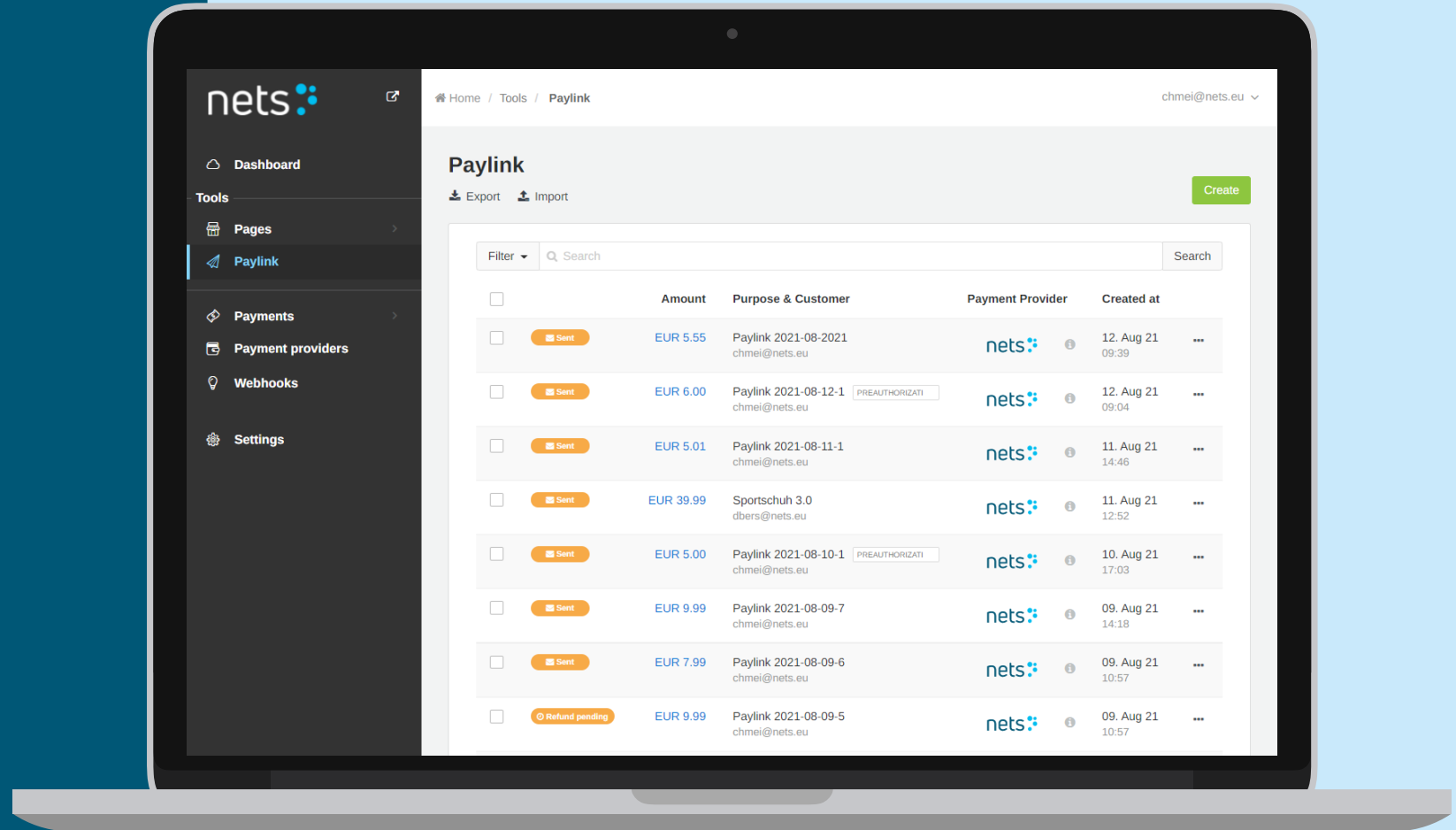
- Choose in which look & feel the paylink should be displayed.
- By clicking on the green „Create“ button, you send the paylink to the recipient.



# 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.

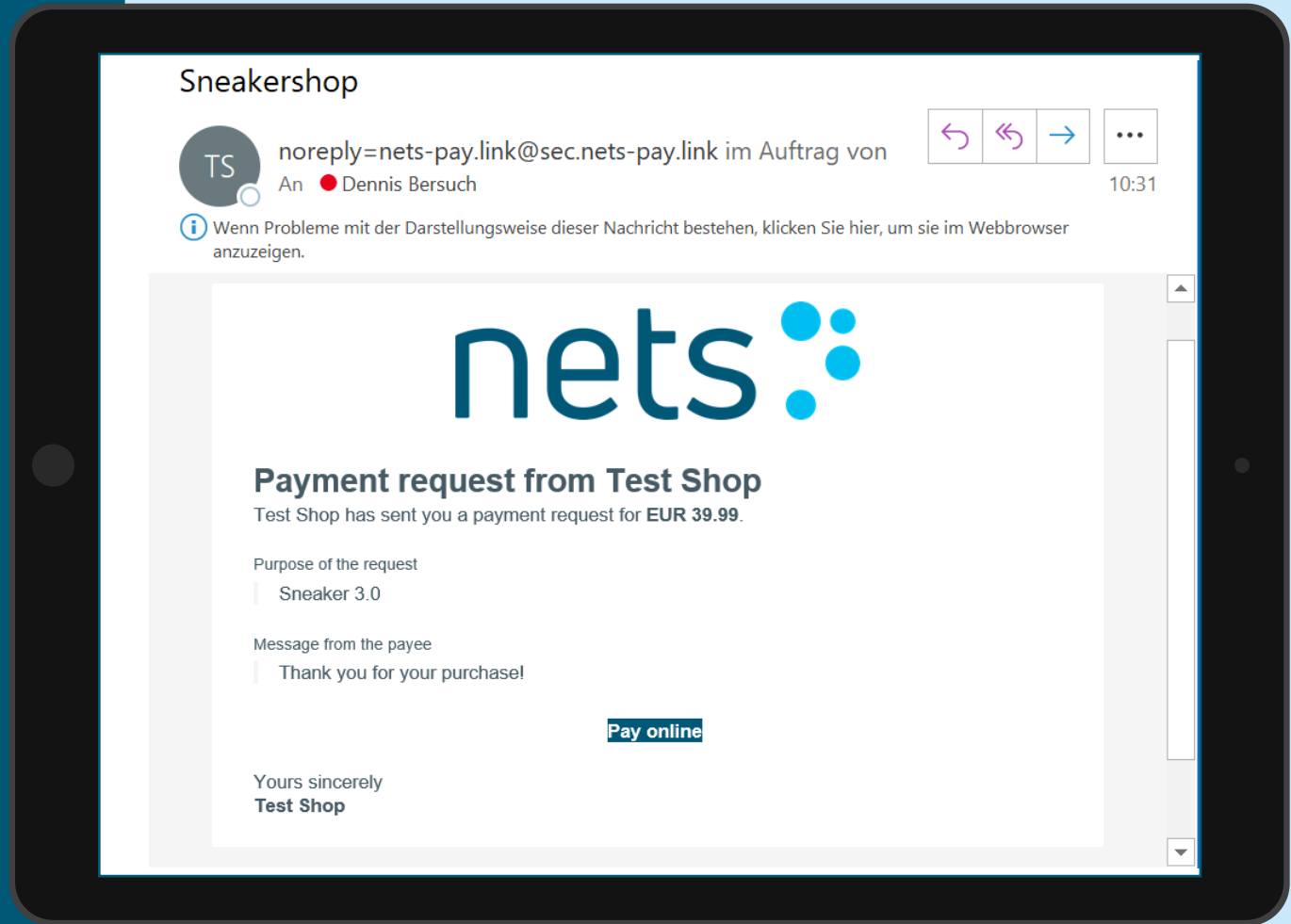




# Create a Paylink



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



# Create a Paylink



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

The image shows a tablet screen displaying a payment interface from Nets. The interface is titled 'Paylink' and 'Test Shop'. It features the Nets logo in the top left corner and a language selector set to 'English' in the top right. The main content area displays the product 'Sneaker 3.0' with a price of '39.99 EUR' and a note 'incl. 19.00% VAT'. Below this, there is a 'Contact details' section with several input fields: 'Title' (a dropdown menu), 'First Name', 'Last Name', 'Street & No.', 'Postcode', 'City', 'Country' (a dropdown menu showing 'Germany'), and 'Email \*' (containing 'dbers@nets.eu'). There are two checkboxes for accepting terms: 'I accept the general terms and conditions.' and 'I accept the privacy policy.' Below these, a message states 'Click on the button below to complete the payment with NETS.' A large blue button with a shopping cart icon and the text 'Pay EUR 39.99' is prominently displayed. At the bottom of the button area, it says 'Secure connection with 256-bit SSL'. A 'Legal Notices' link is visible at the very bottom left of the page.



Create a Paylink with  
optional parameters

easy | nets 

# Paylink Options



## General:

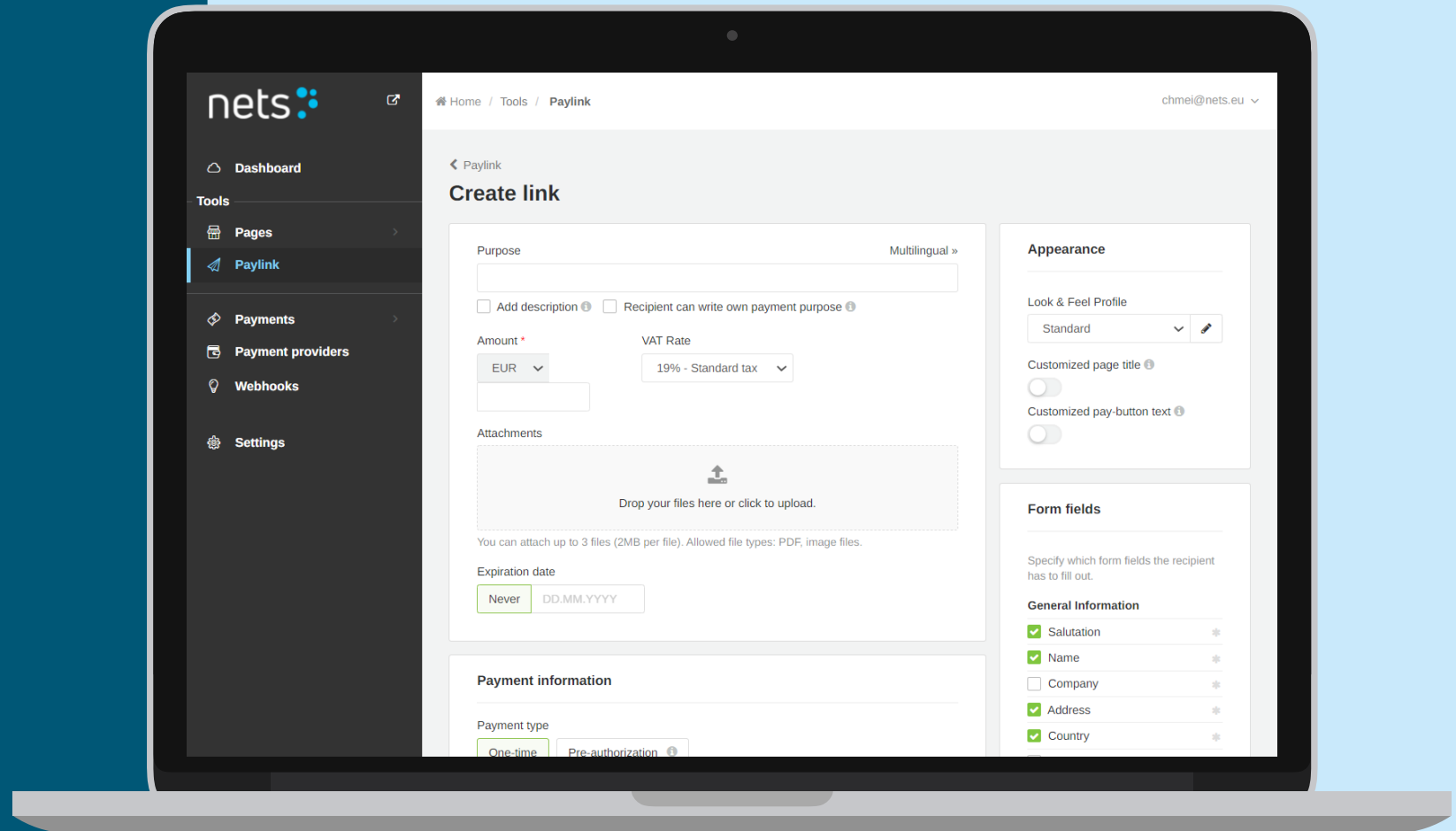
- You can add a description for your paylink, which will be displayed „on top“ of the paylink page.
- Upload attachments that will be displayed on the paylink page.
- Specify an expiration date for the paylink.

## 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.



# 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 platform you can specify your own **external reference**. This will also be shown in the Easy portal.

The screenshot displays the 'nets:' dashboard with a sidebar menu containing 'Dashboard', 'Tools', 'Pages', 'Paylink', 'Payments', 'Payment providers', 'Webhooks', and 'Settings'. The 'Paylink' section is active, showing a form for creating a payment link. The form includes sections for 'Payment information' (Expiry date, Payment type), 'Recipient' (Email address), 'Legal' (General Terms and Conditions, Privacy policy), and 'Advanced options' (Item number, External reference). The 'Send' button is visible at the bottom.

nets:

Dashboard

Tools

Pages

Paylink

Payments

Payment providers

Webhooks

Settings

You can attach up to 3 files (2MB per file). Allowed file types: PDF, image files.

Expiry date

Never DD.MM.YYYY

Payment information

Payment type

One-time Pre-authorization ⓘ

Recipient

Email address \*

add Email address and confirm with Comma or Enter key

Separate multiple recipients by comma.

☐ Add additional recipient information ⓘ

Send

send as Email Send later

Language

English

Specify which form fields the recipient has to fill out.

General Information

☐ Salutation ⓘ

☒ Name ⓘ

☐ Company ⓘ

☐ Address ⓘ

☐ Country ⓘ

☐ Telephone ⓘ

☒ Email address \*

Legal

Must be accepted by the recipient

☒ General Terms and Conditions \*

☒ Privacy policy \*

These settings are automatically applied to newly created links.

Advanced options

Item number (SKU)

e.g. S41228

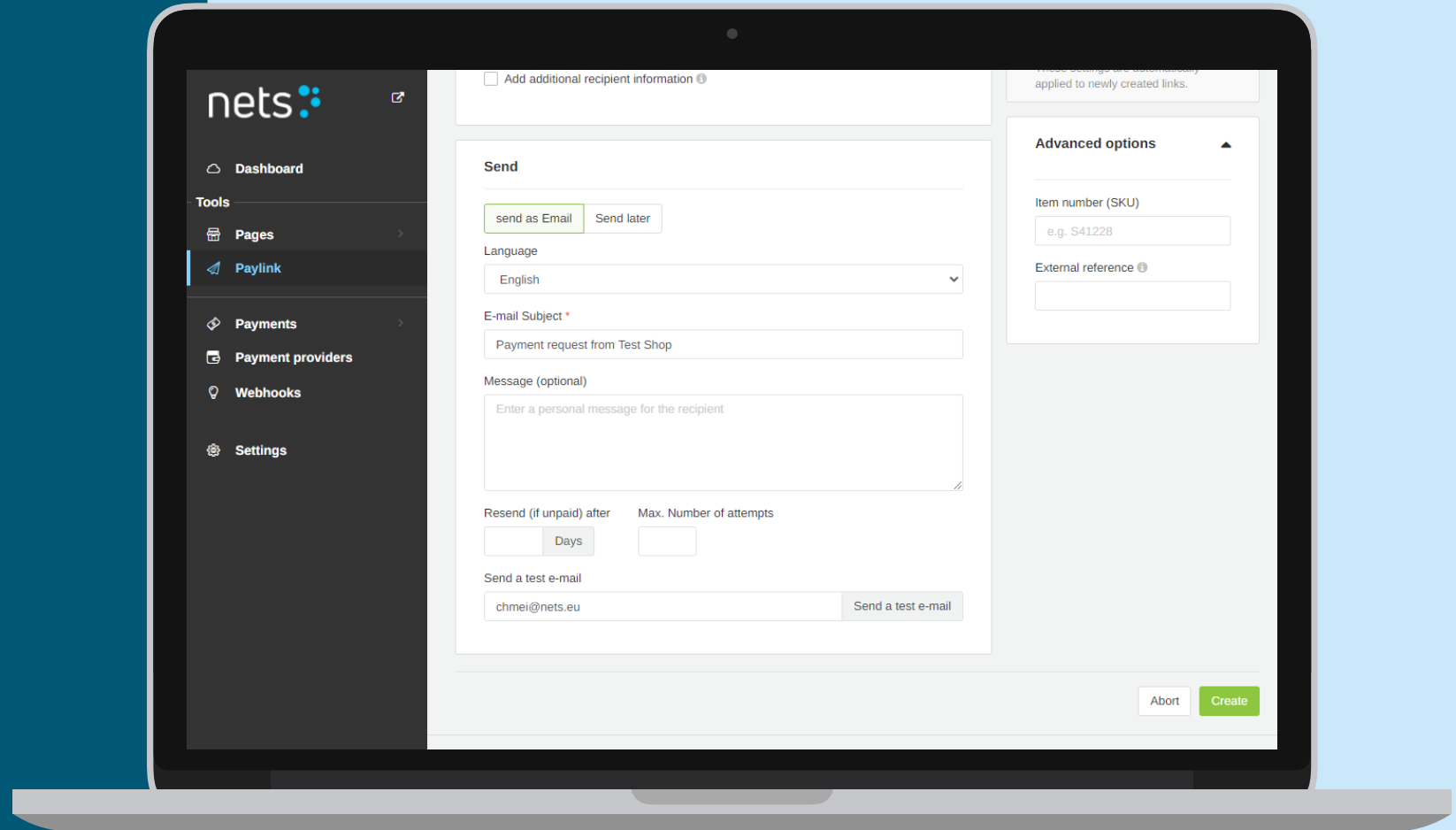
External reference ⓘ

# 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.



# 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.

Paylink  
Test Shop

English

The payment service provider is in test mode.

Sneaker 3.0  
39.99 EUR  
incl. 19.00% VAT

Contact details

Title  
Mr

First Name  
Dennis

Last Name  
Bersuch

Street & No.  
Exemplstreet 9

Zip code  
99999

City  
Examplecity

Country  
Germany

Email  
dbers@nets.eu

☐ I accept the [general terms and conditions](#).

☐ I accept the [privacy policy](#).

Click on the button below to complete the payment with NETS.

Pay EUR 39.99

Secure connection with 256-bit SSL

Imprint  
The company Test Shop from Eschborn is responsible for this payment form.

Powered by Easy Paylink



## ● Create a One Page Shop

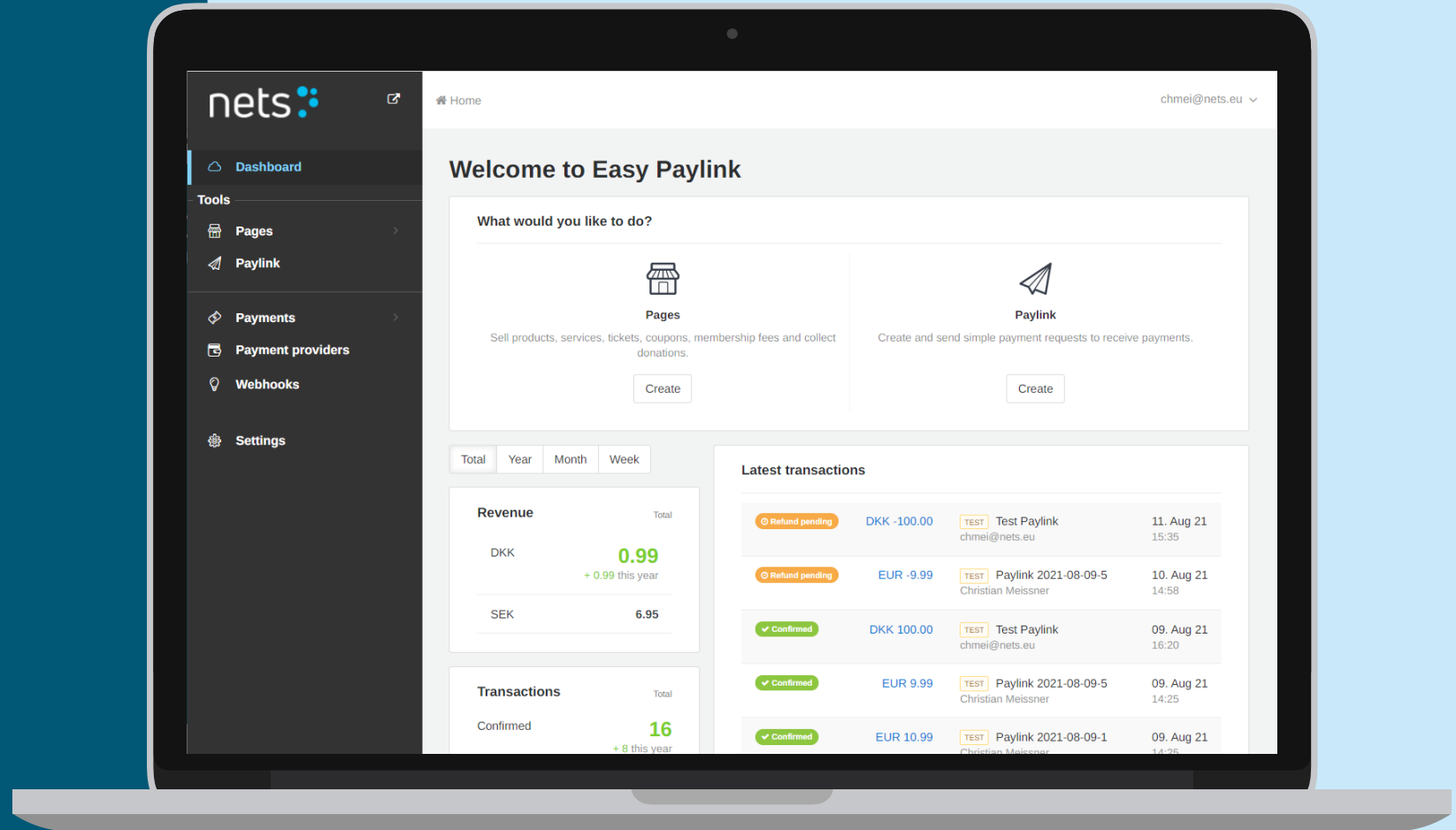
In this tutorial we show you how to create your own One Page Shop in 7 steps.



# Create a One Page Shop



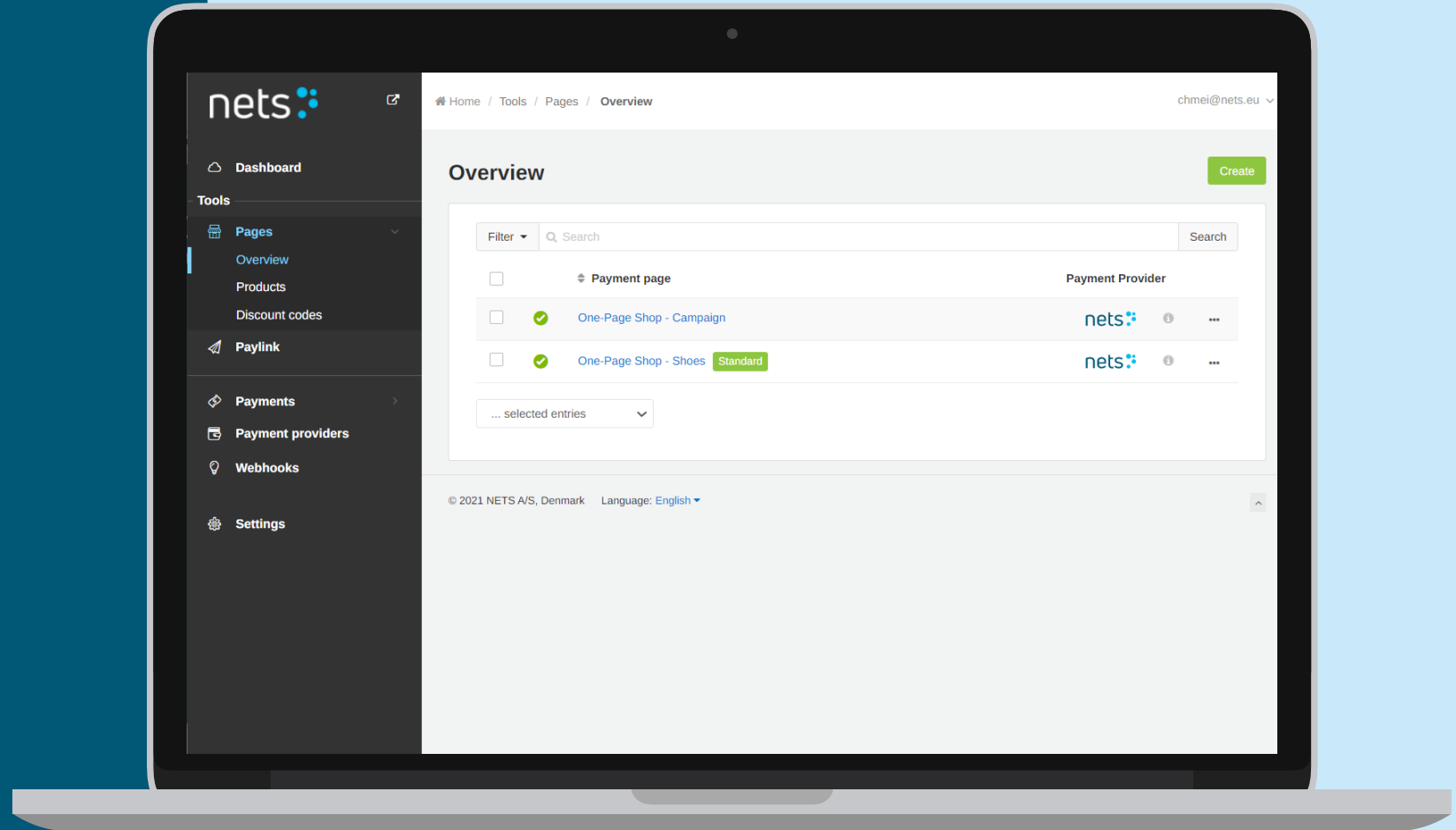
- Click on the „Pages“ tab on the left and afterwards on the „Overview“ menu.



# Create a One Page Shop



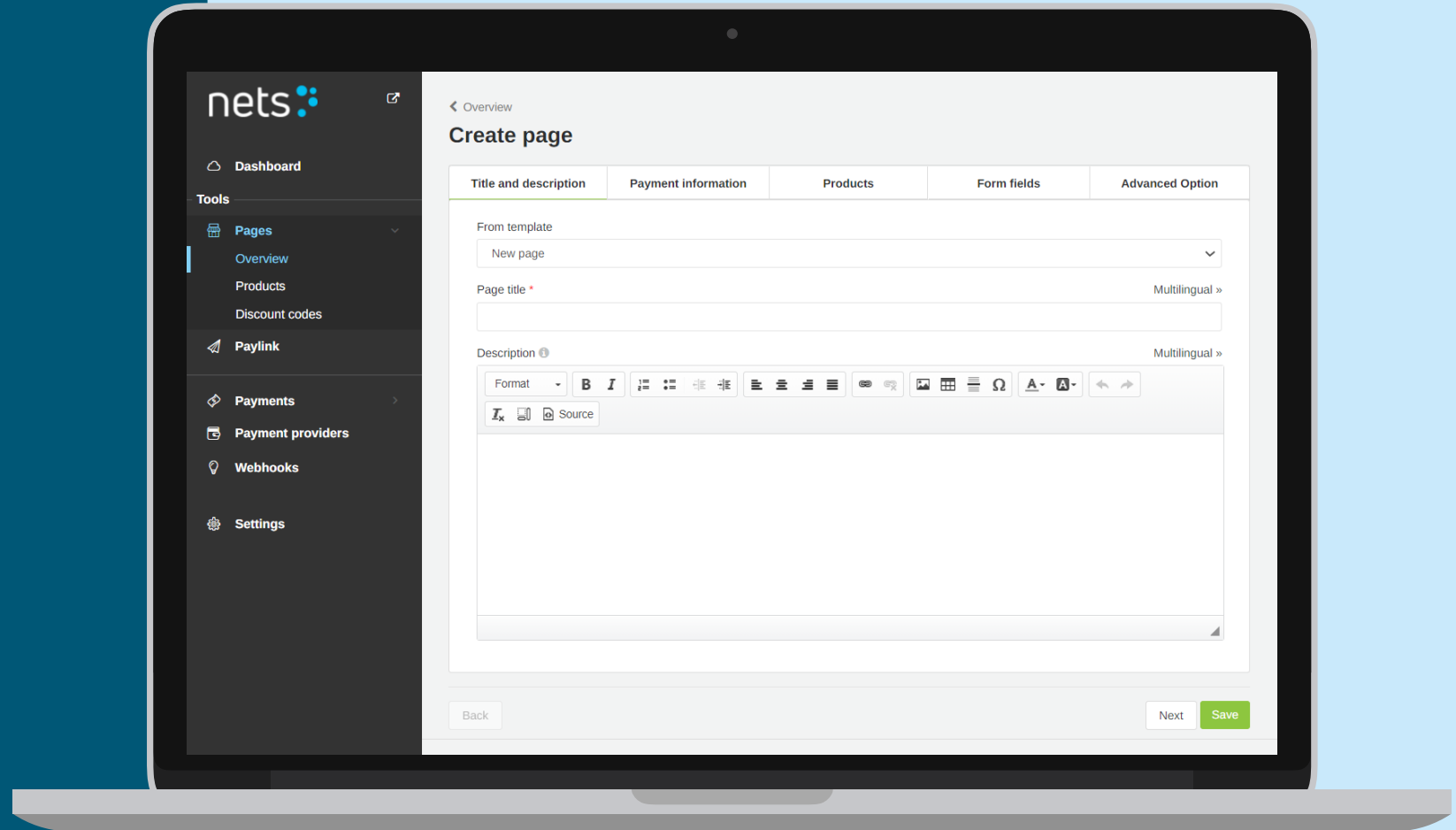
- Afterwards an overview of all your previous One Page Shops will open. To create a new One Page Shop click on the green „Create“-button.



# Create a One Page Shop



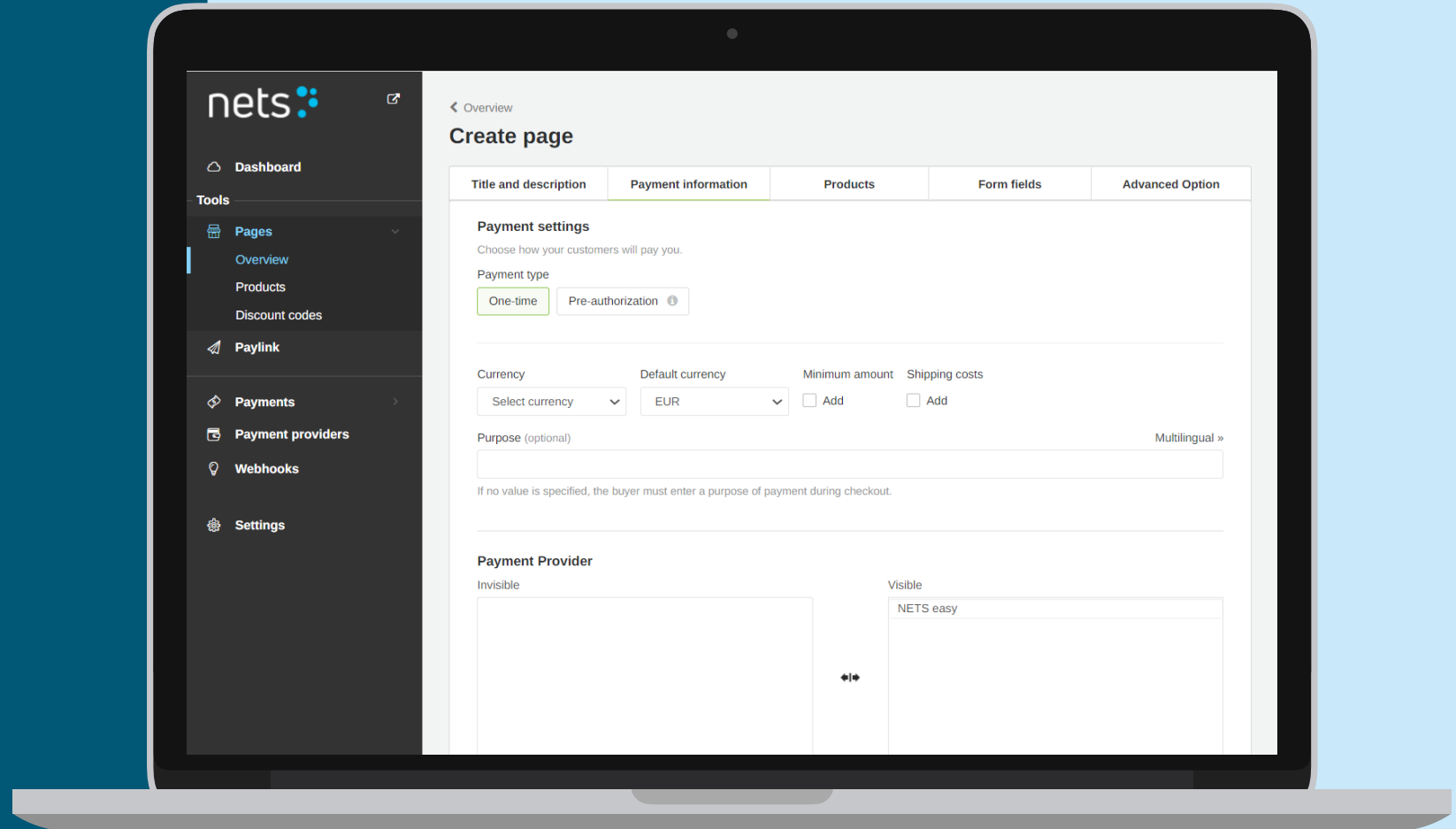
- Enter your page title.
- Add a description for your One Page Shop.
- Please click on the „Payment Information“ tab to continue creating your one Page Shop.



# Create a One Page Shop



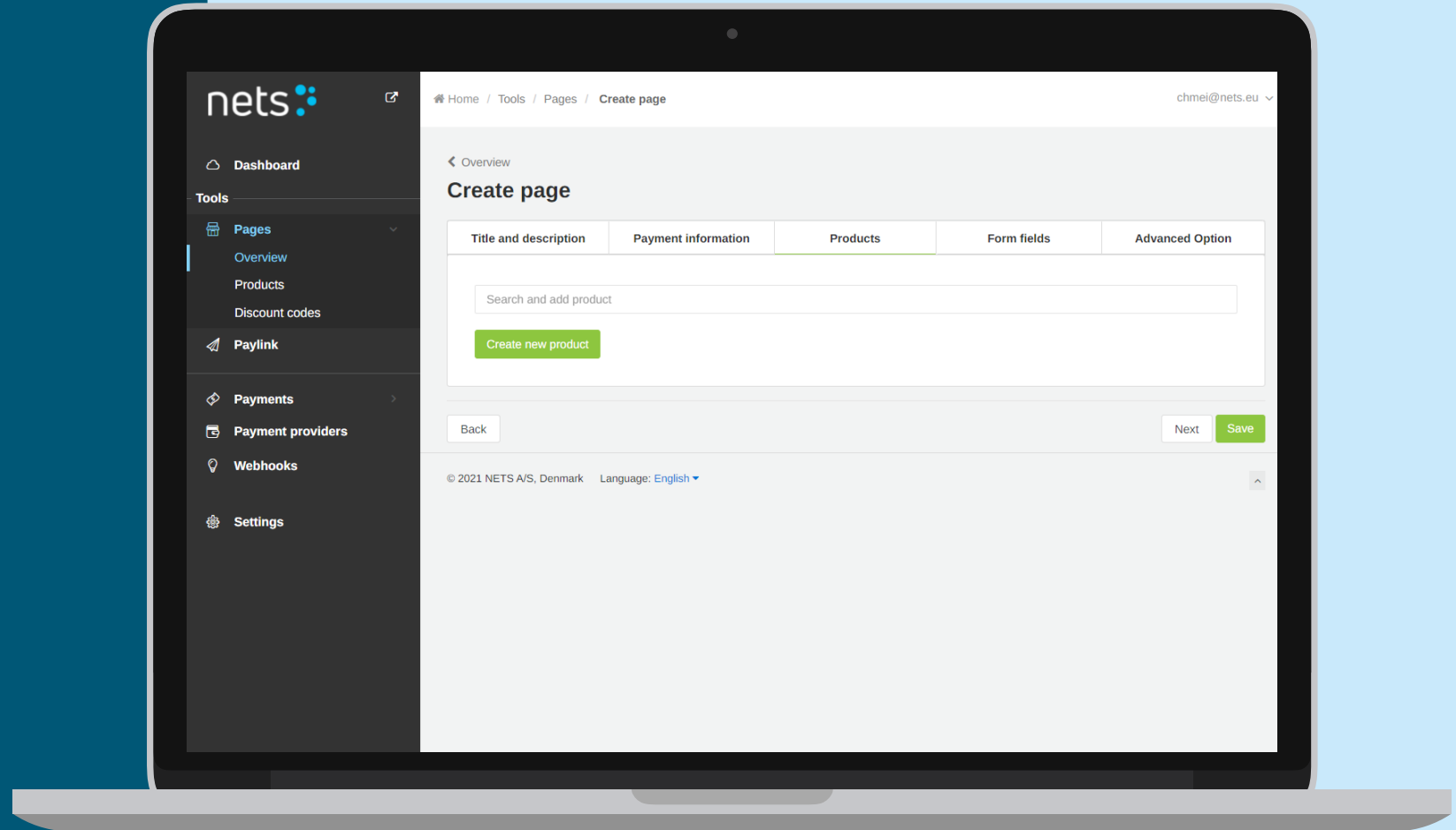
- You can choose between a one-time payment and a pre-authorization.
- You can select the currency in a drop-down in case your account supports multiple currencies. You can set the minimum amount for a valid order and shipping costs.
- **Purpose:** This field can only be filled in if you are not adding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



# Create a One Page Shop



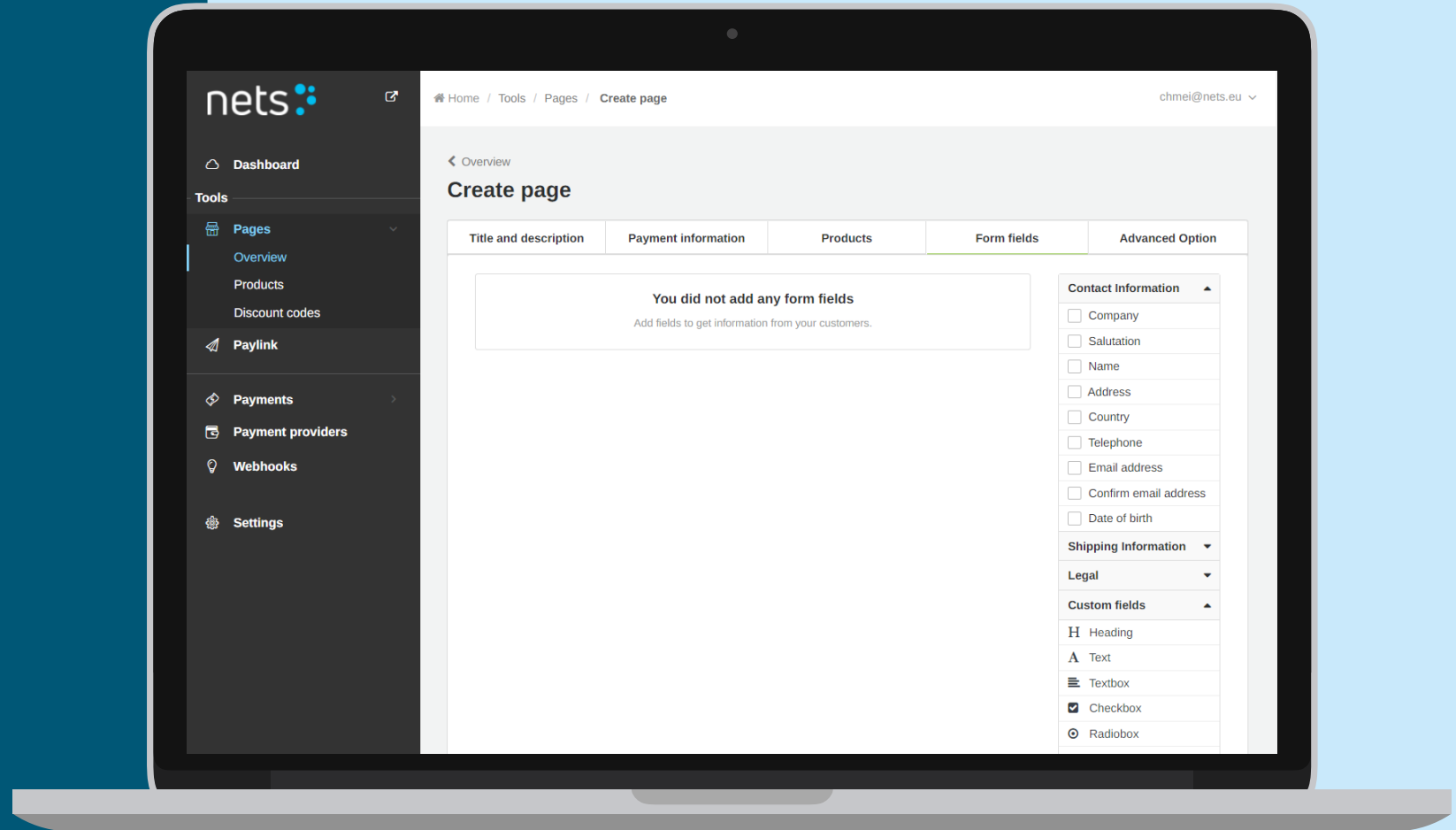
- You can search for your already existing products and add them to your One Page Shop.
- Alternatively you can create a new product by clicking on the green „Create new product“-button.
- Please click on the „Form fields“ tab to continue the creation of your One Page Shop.



# Create a One Page Shop



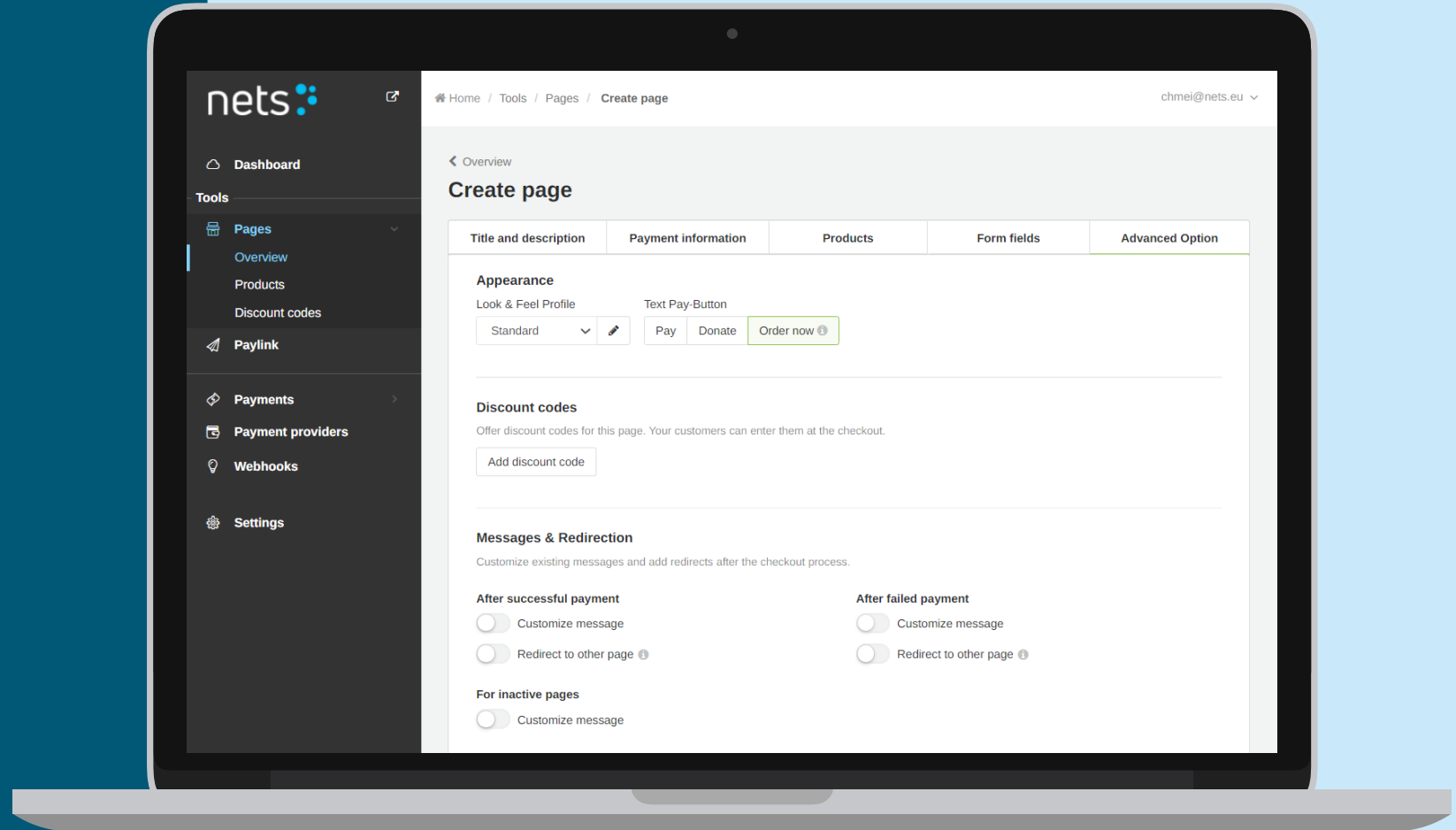
- You can determine which input fields should be displayed on your One Page Shop and whether they should be mandatory. To add a field, select it in the right side via the checkboxes.
- You can now create your One Page Shop by clicking on the green „Save“-button.
- However, you can still define some more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



# 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.





## ● Add products

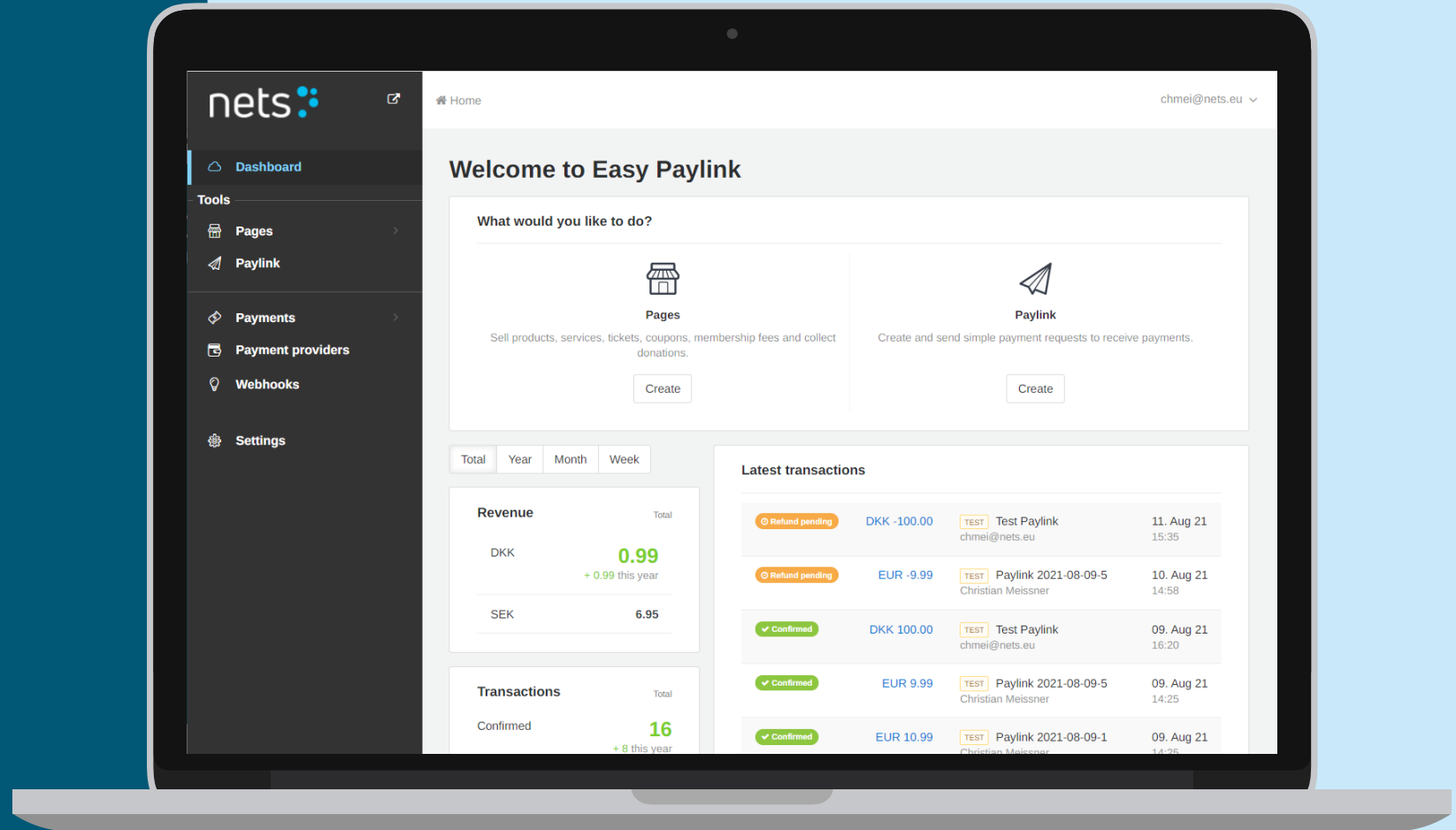
In this tutorial we show you how to create or add products in three steps.



# Add Products



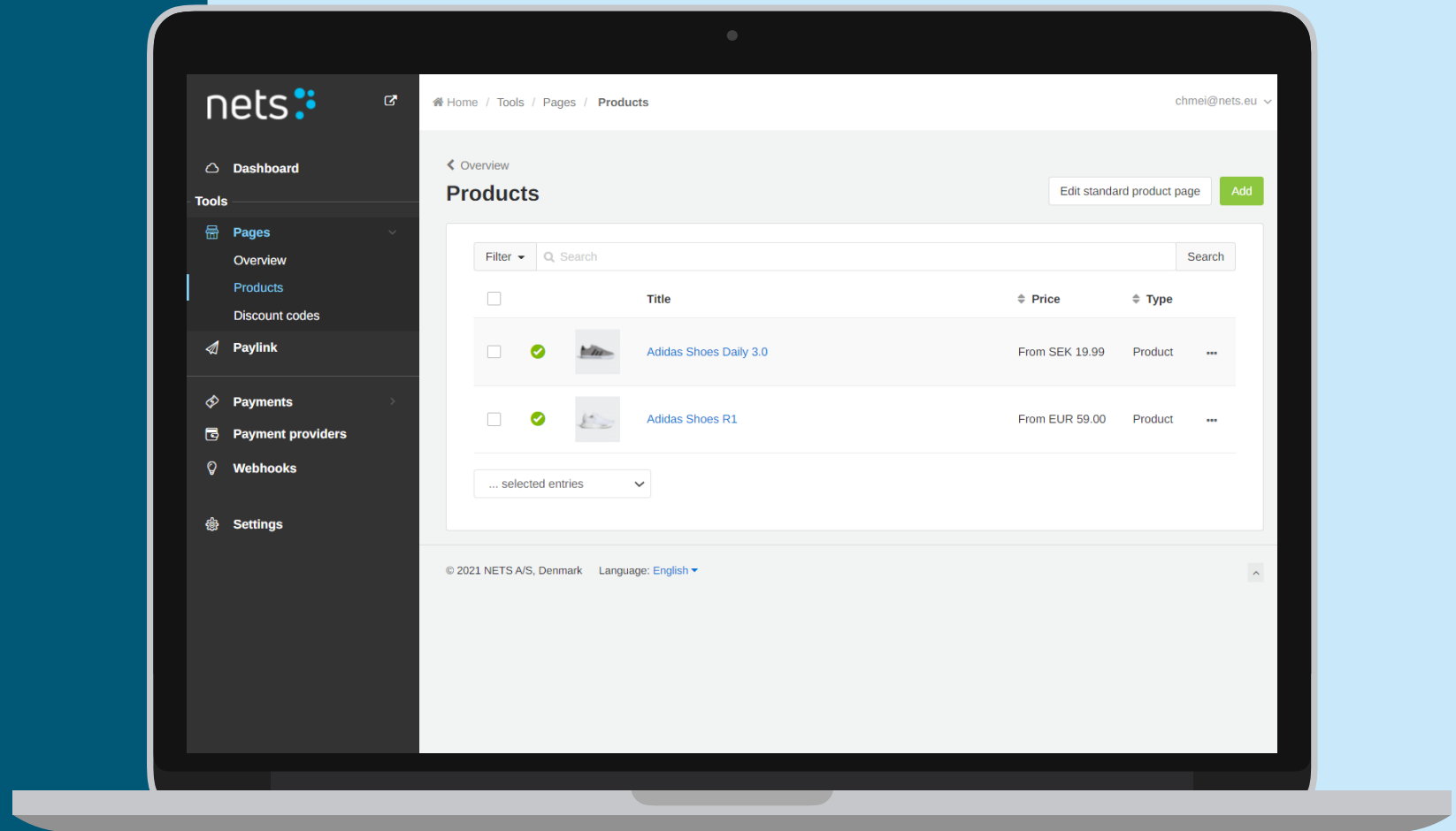
- Click on the „Pages“ tab on the left and select the „Products“ sub-section.



# Add Products



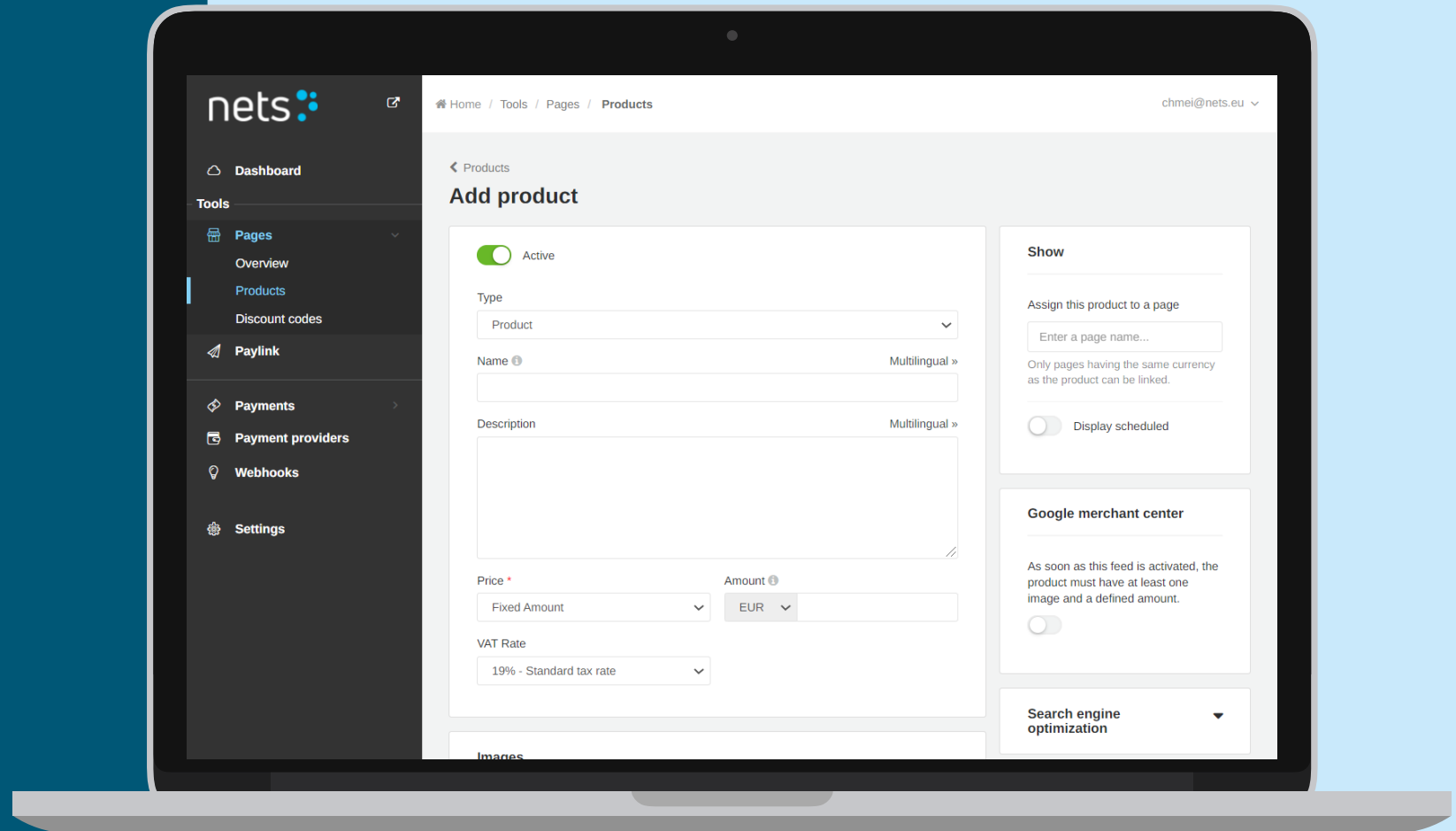
- To create a product click on the green „Add“-button.



# 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.





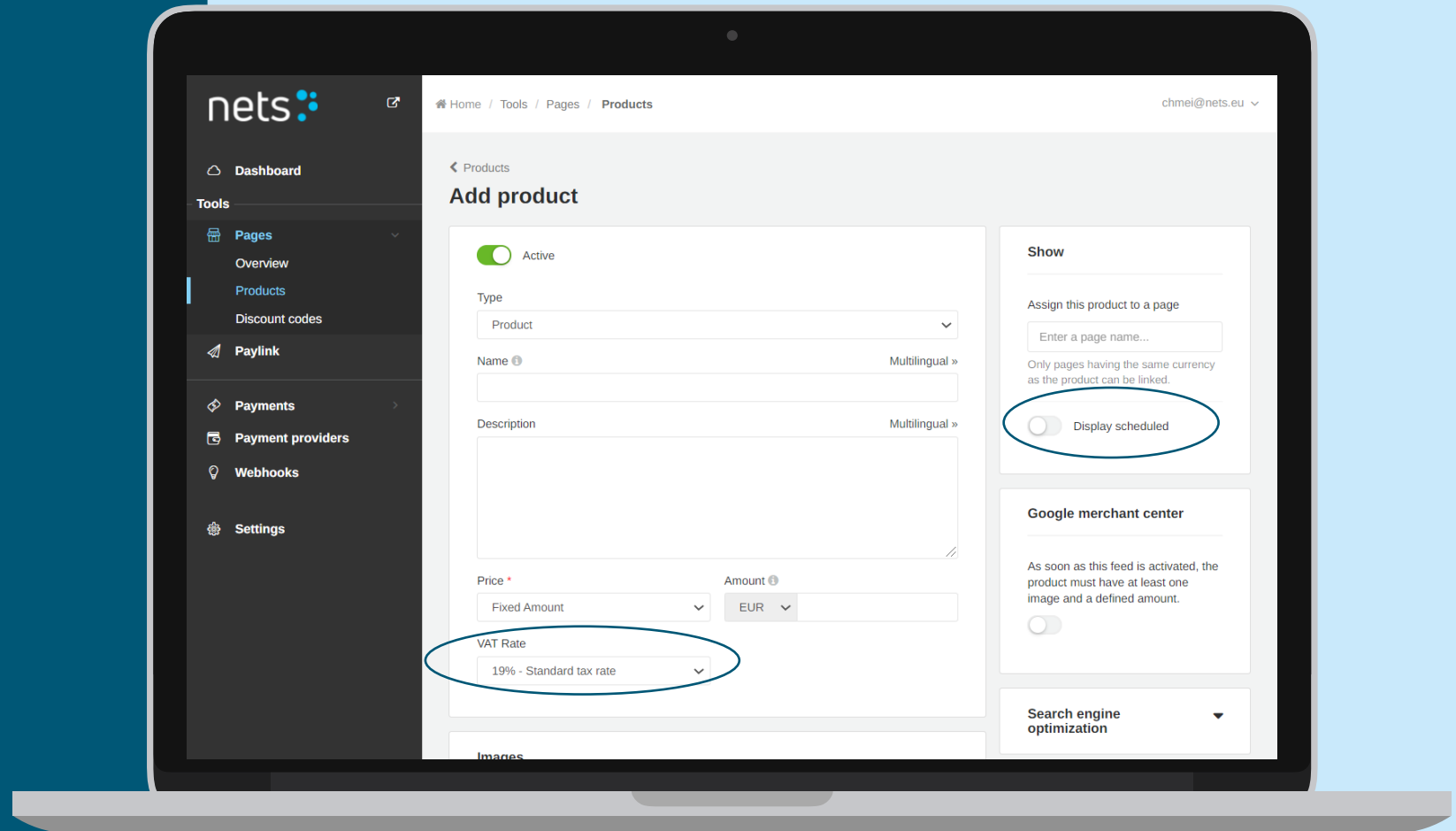
Add Products with optional  
parameters

easy | nets

# Add Products



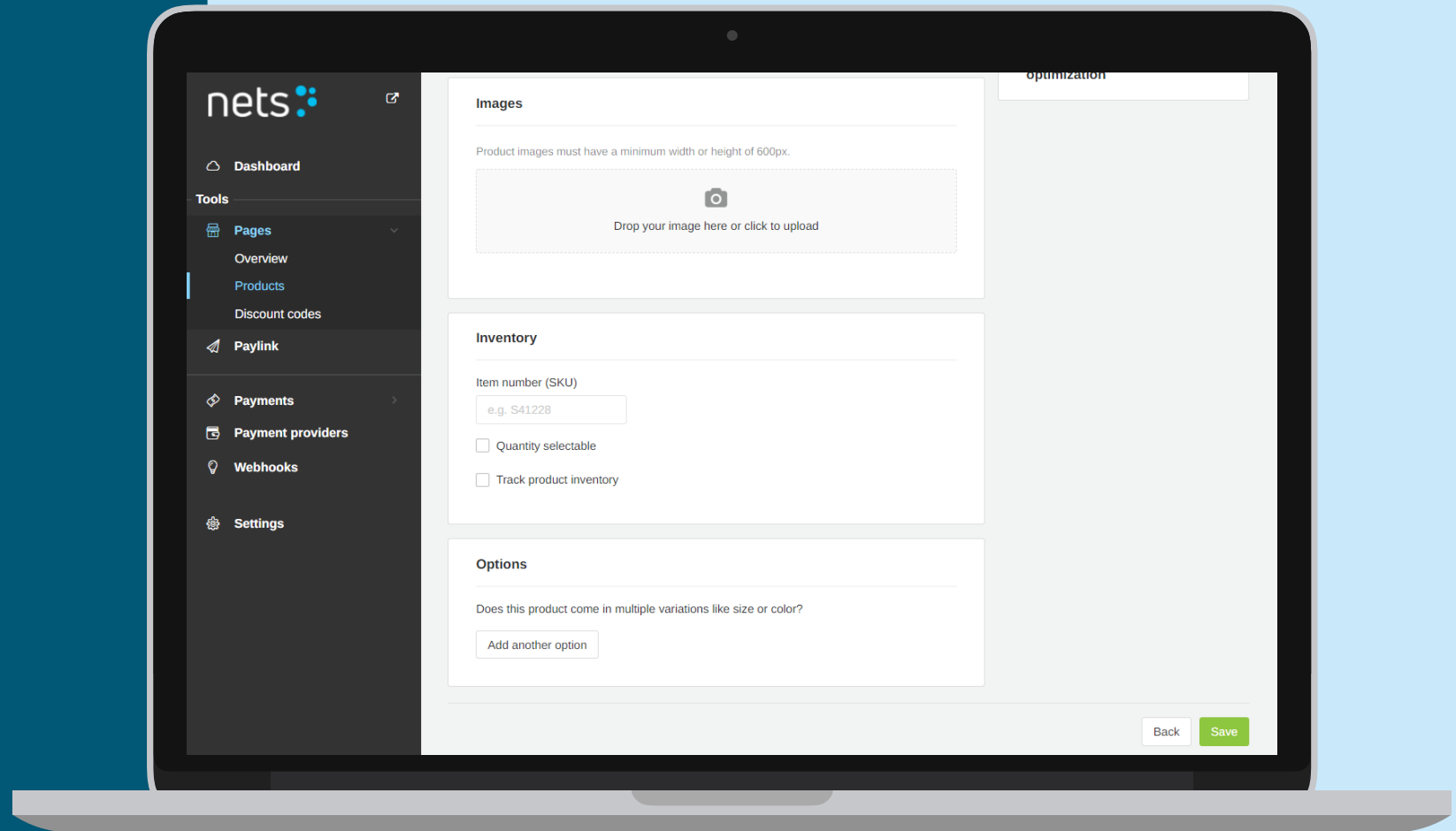
- You can also display your products only for a certain period of time. After this time your product will no longer be displayed.
- You can define the VAT rate.



# Add Products



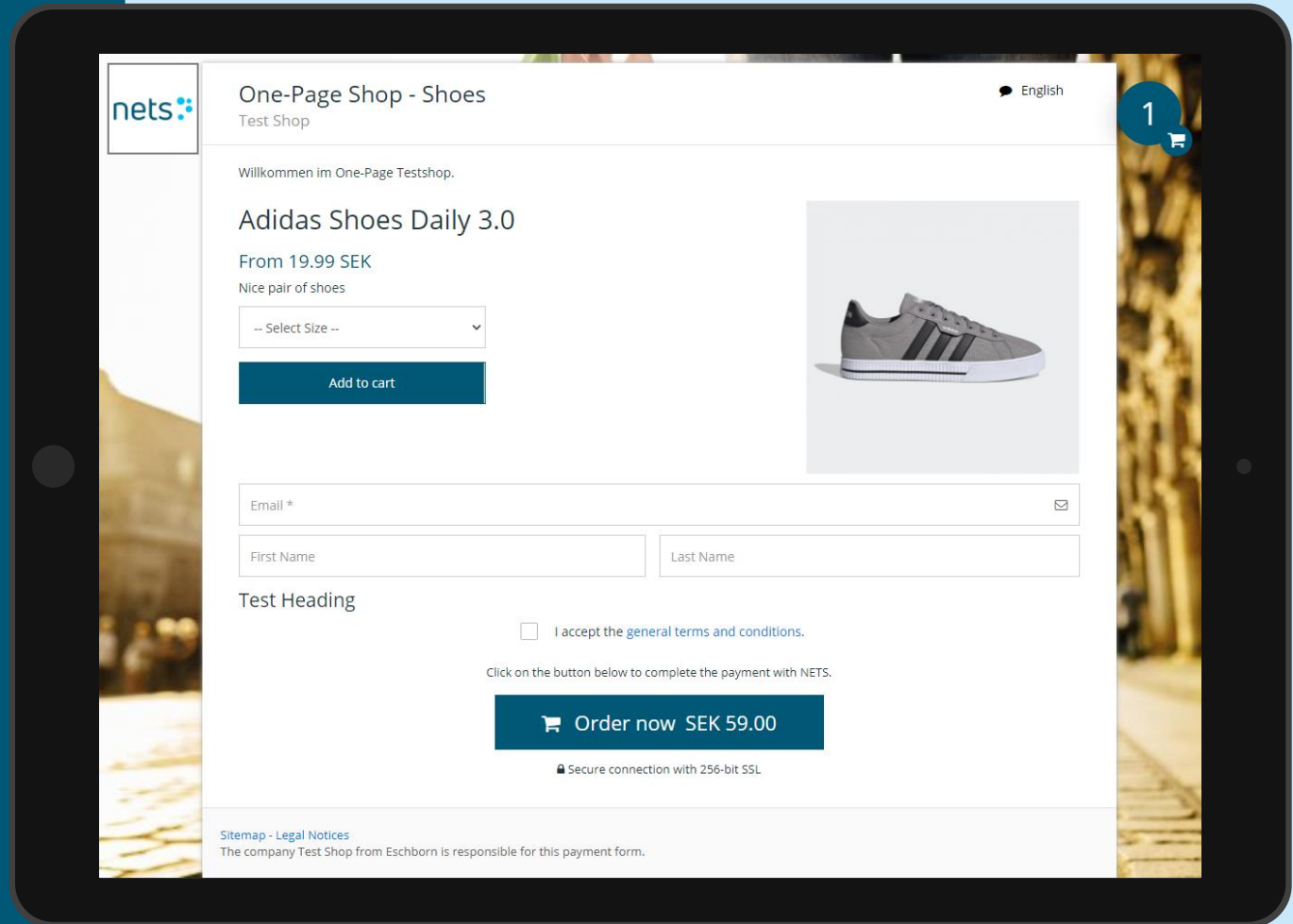
- You can define whether customers can choose an order quantity.
- You can keep track of your stock. You can only see the functions in the backend of the paylink.
- Under options you can list different variations of your product. It is important that you separate each variation with a comma, because 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.



# Add Products



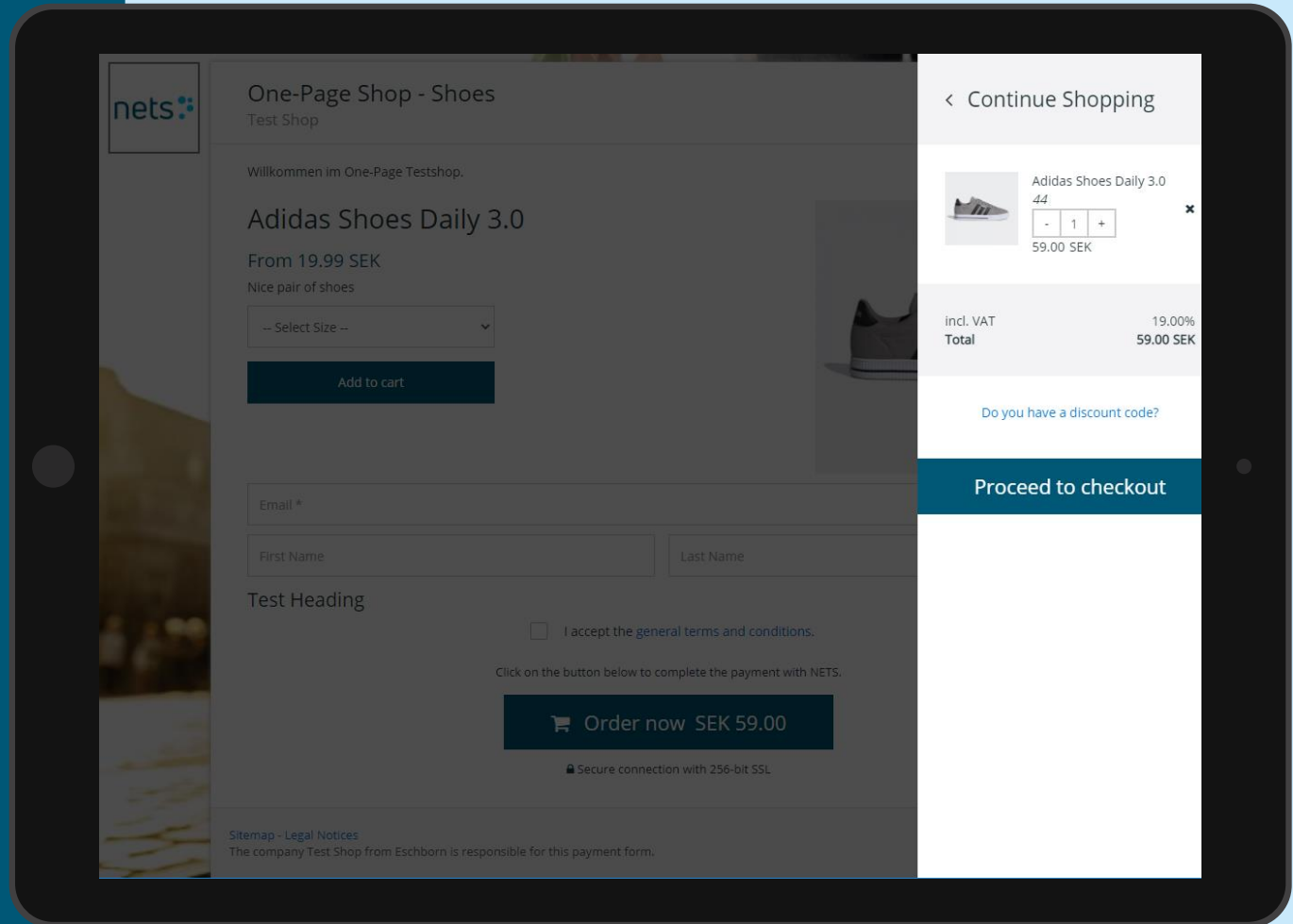
- Here you can see what the product page looks like when the customer opens it.
- The customer can choose the products and variations and add them to the shopping cart (accessible via the icon on the top right side).



# 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).







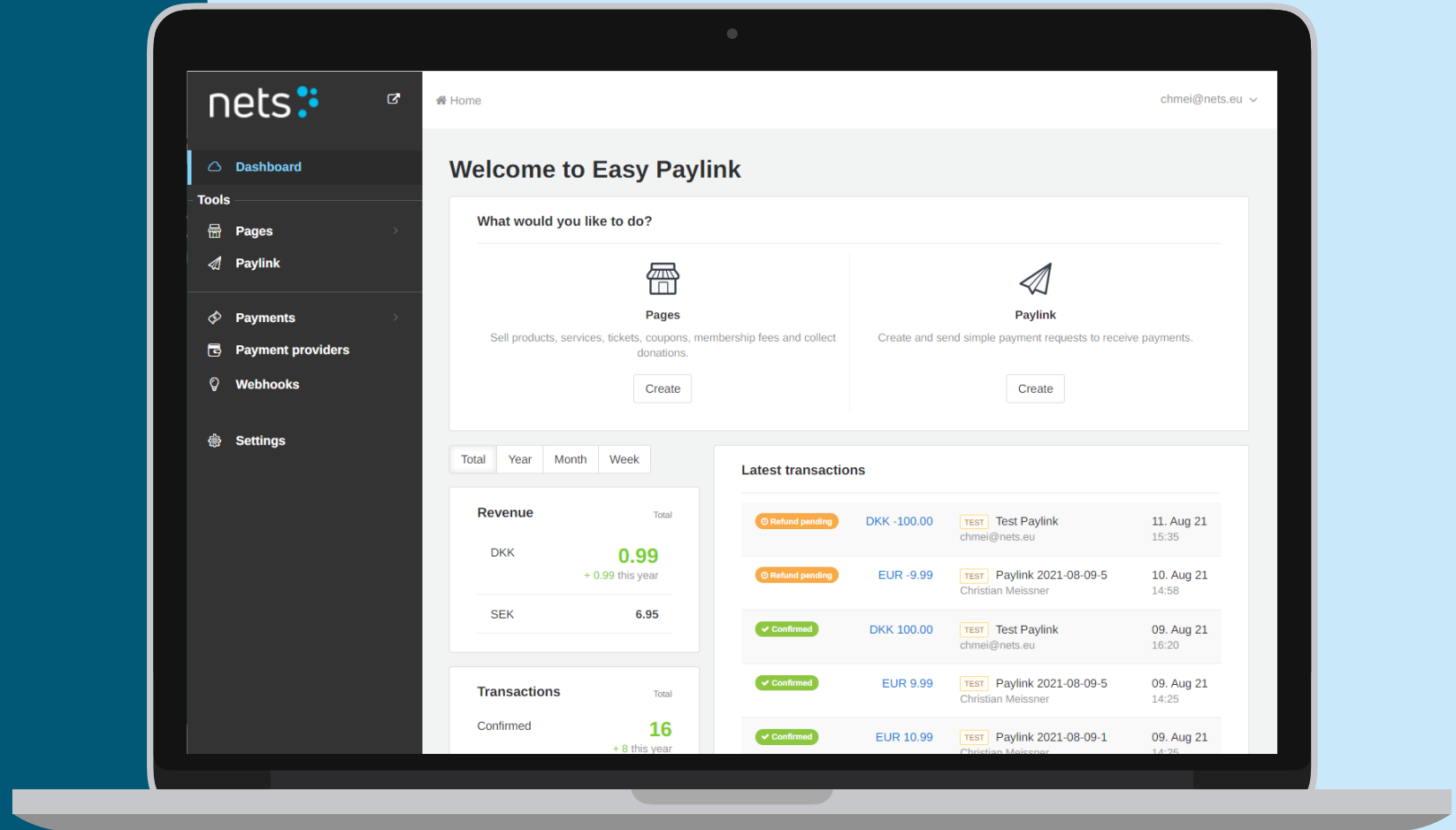
## ● Activate Taxes

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

# Activate Taxes



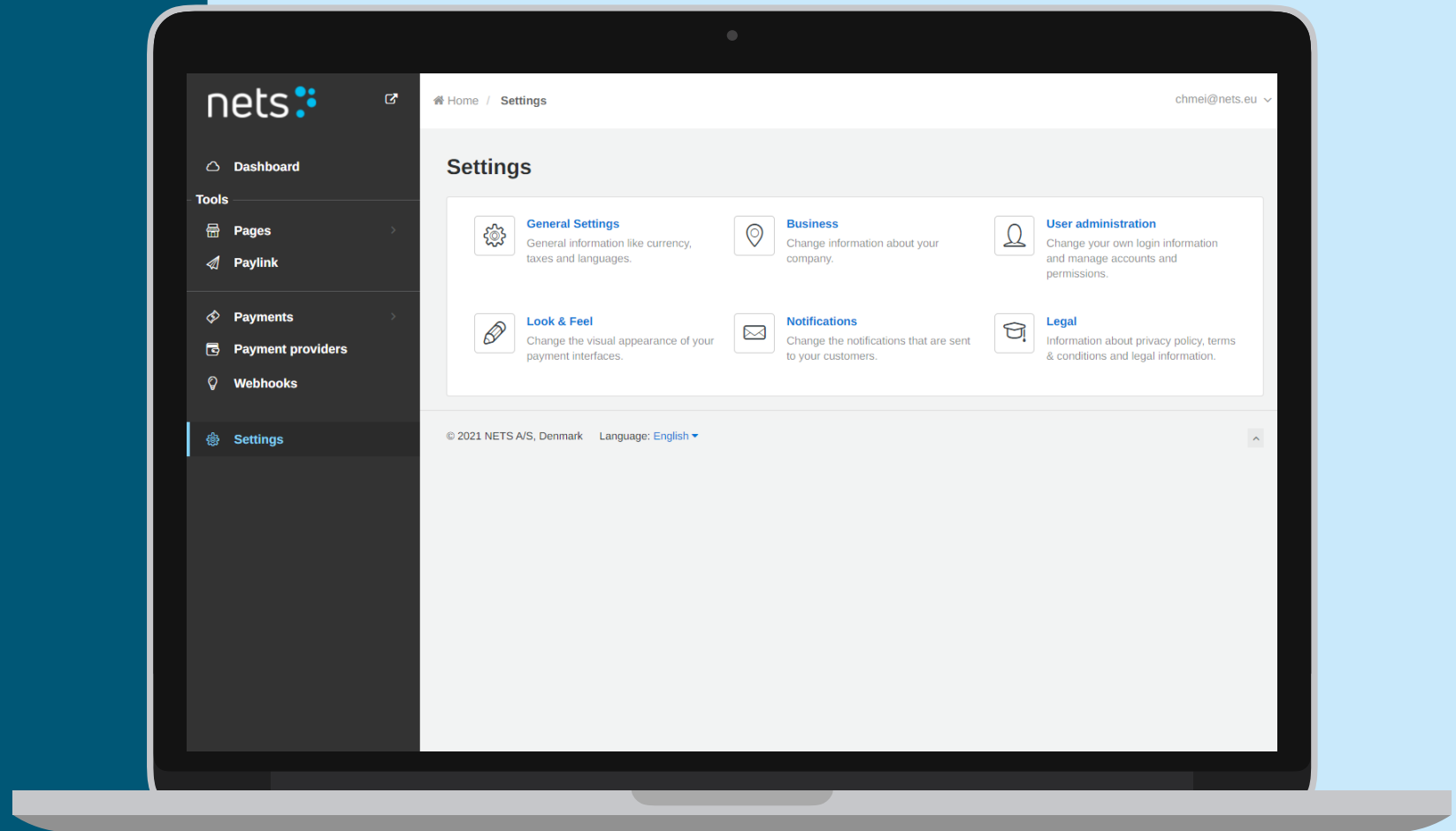
- Click on the „Settings“ tab on the left.



# Activate Taxes



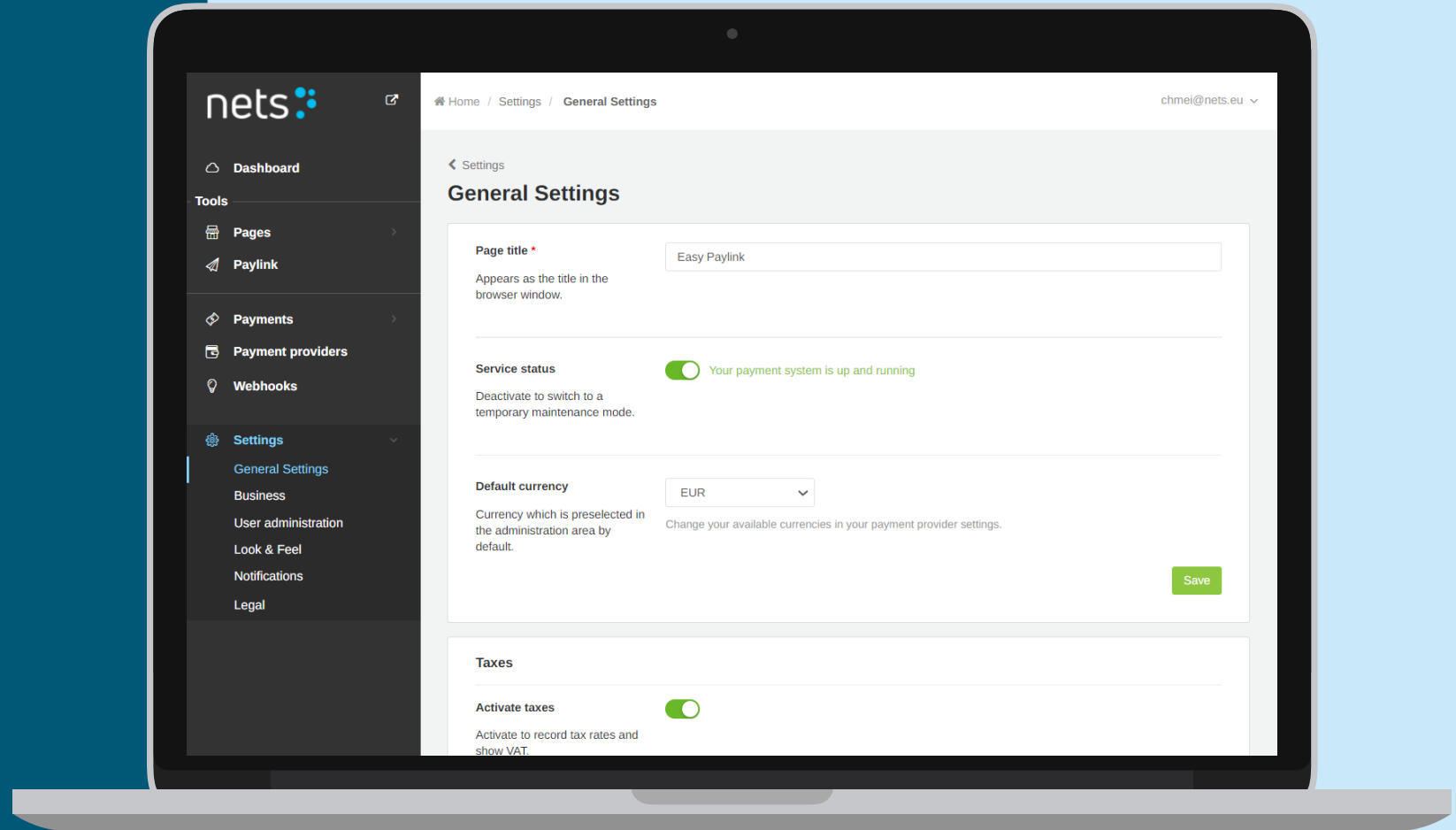
- Click on the „General Settings“ menu item.



# Activate Taxes

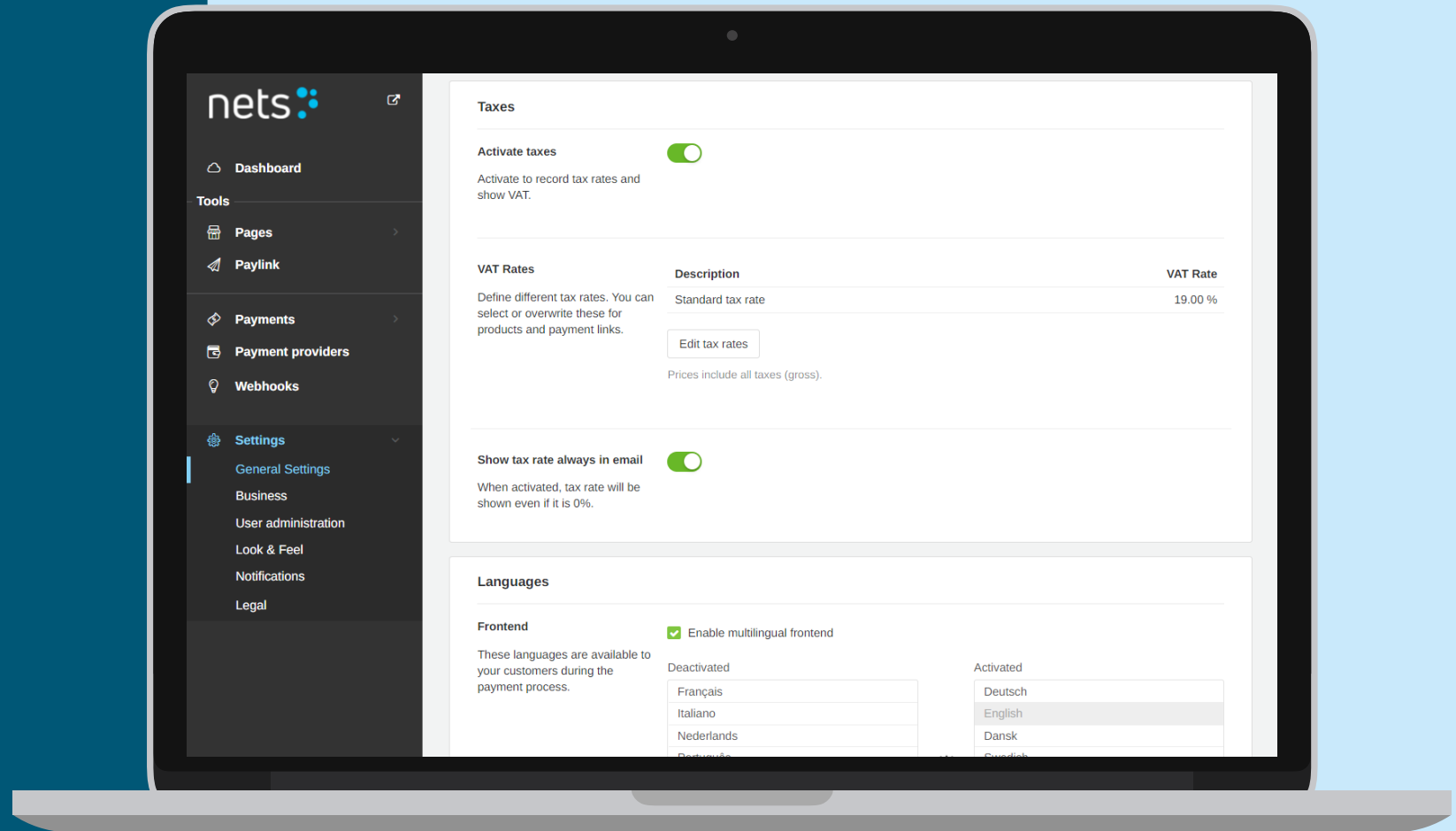


- Click on the „Activate taxes“ slider.



# 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.





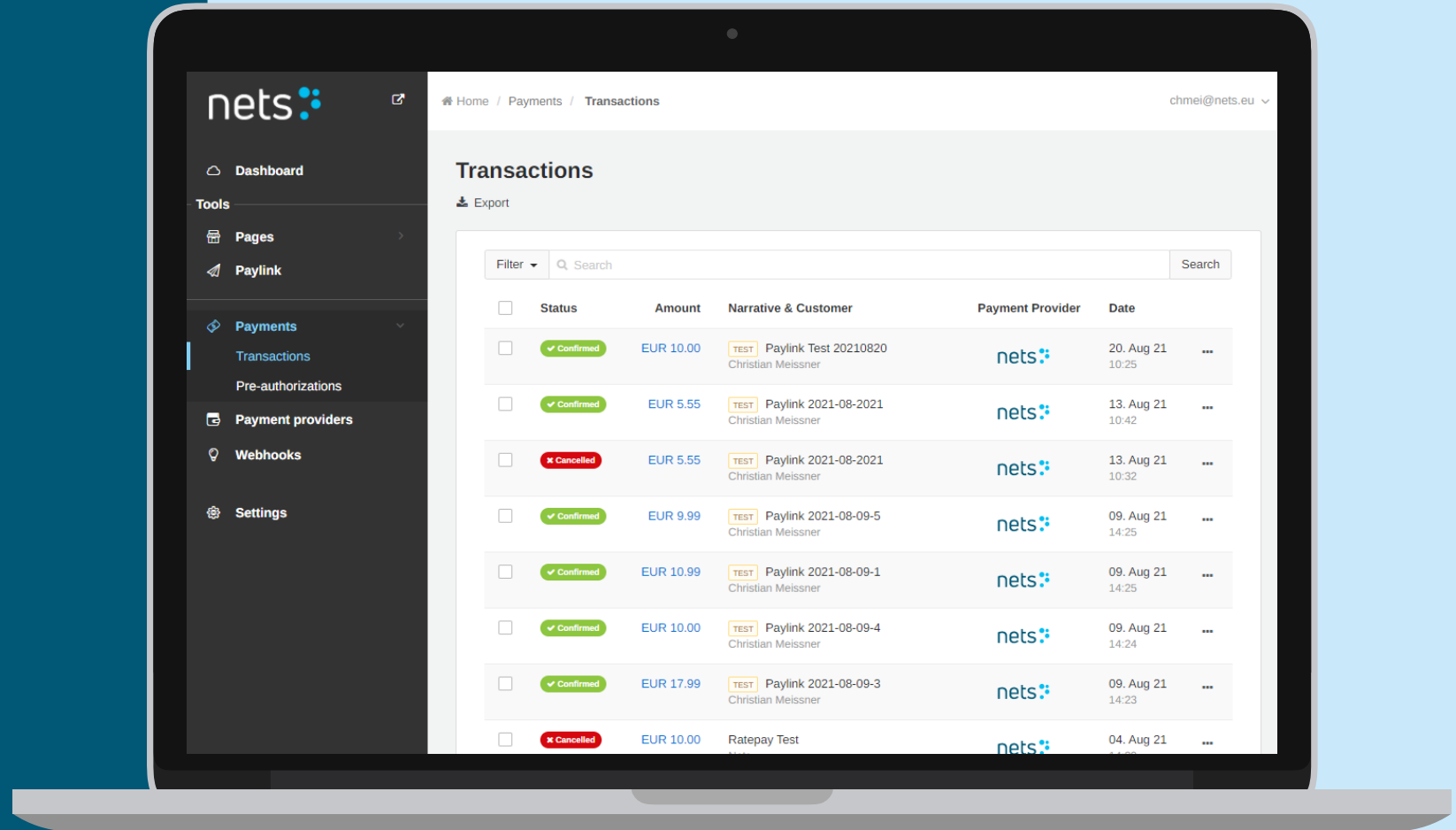
## ● Payments

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

# Payments



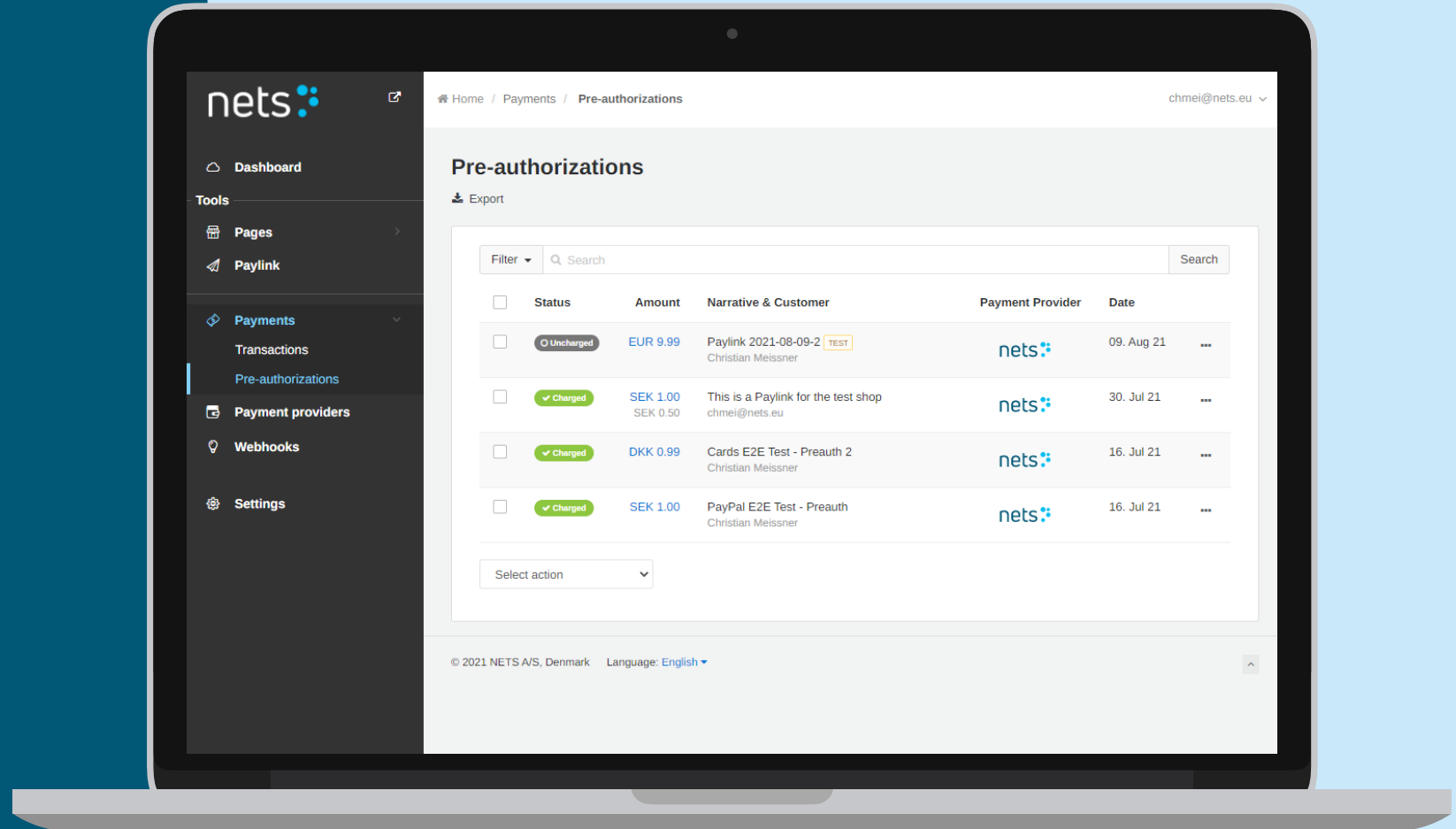
- Via the tab „Payments“ and the sub-menu „Transactions“ all executed payments incl. the corresponding status will be shown.
- This includes transactions where a money flow took place or was initiated.
- You can also search for specific payment transactions using the filter function.
- Results can be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



# 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.

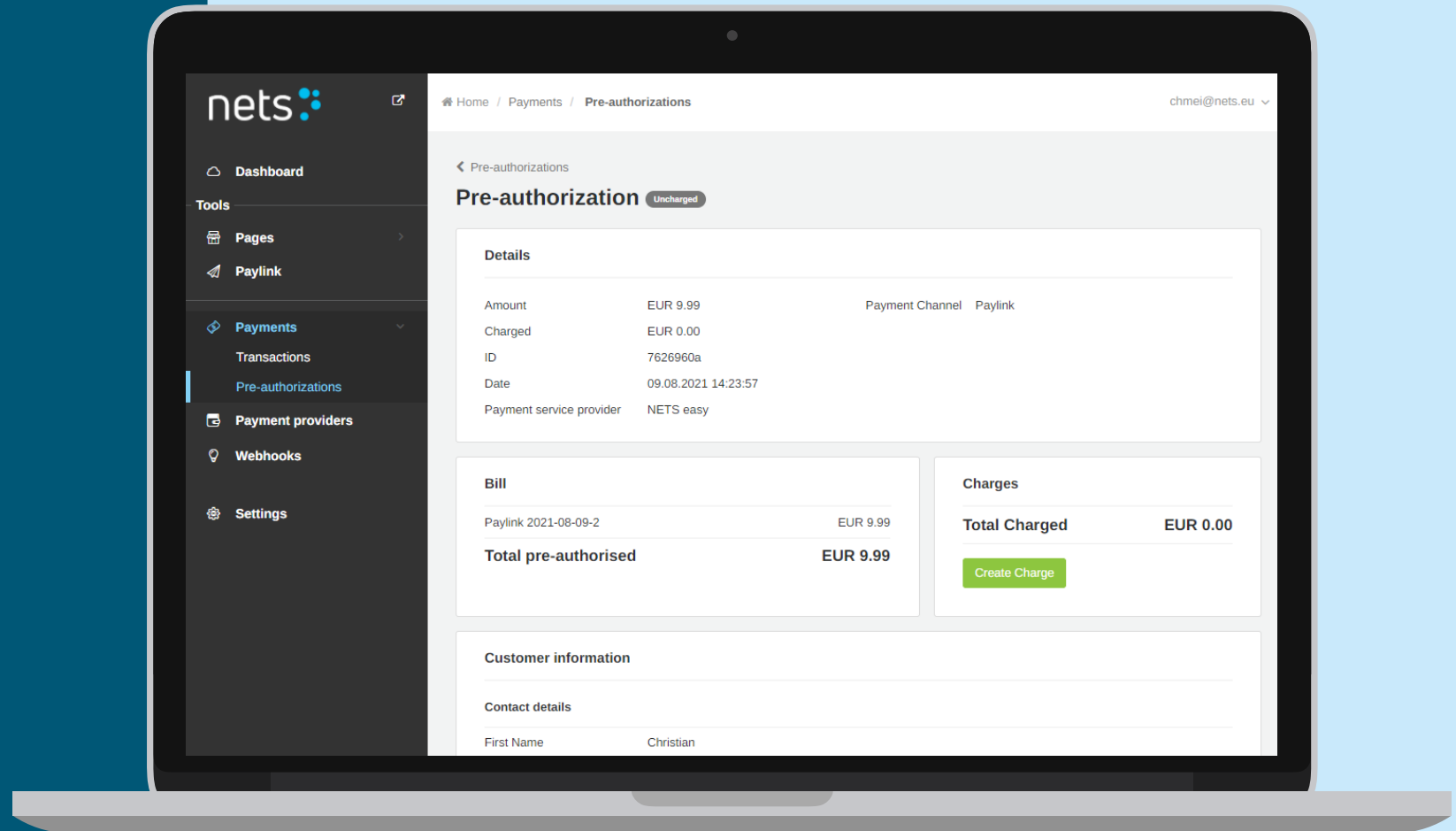




# Payments



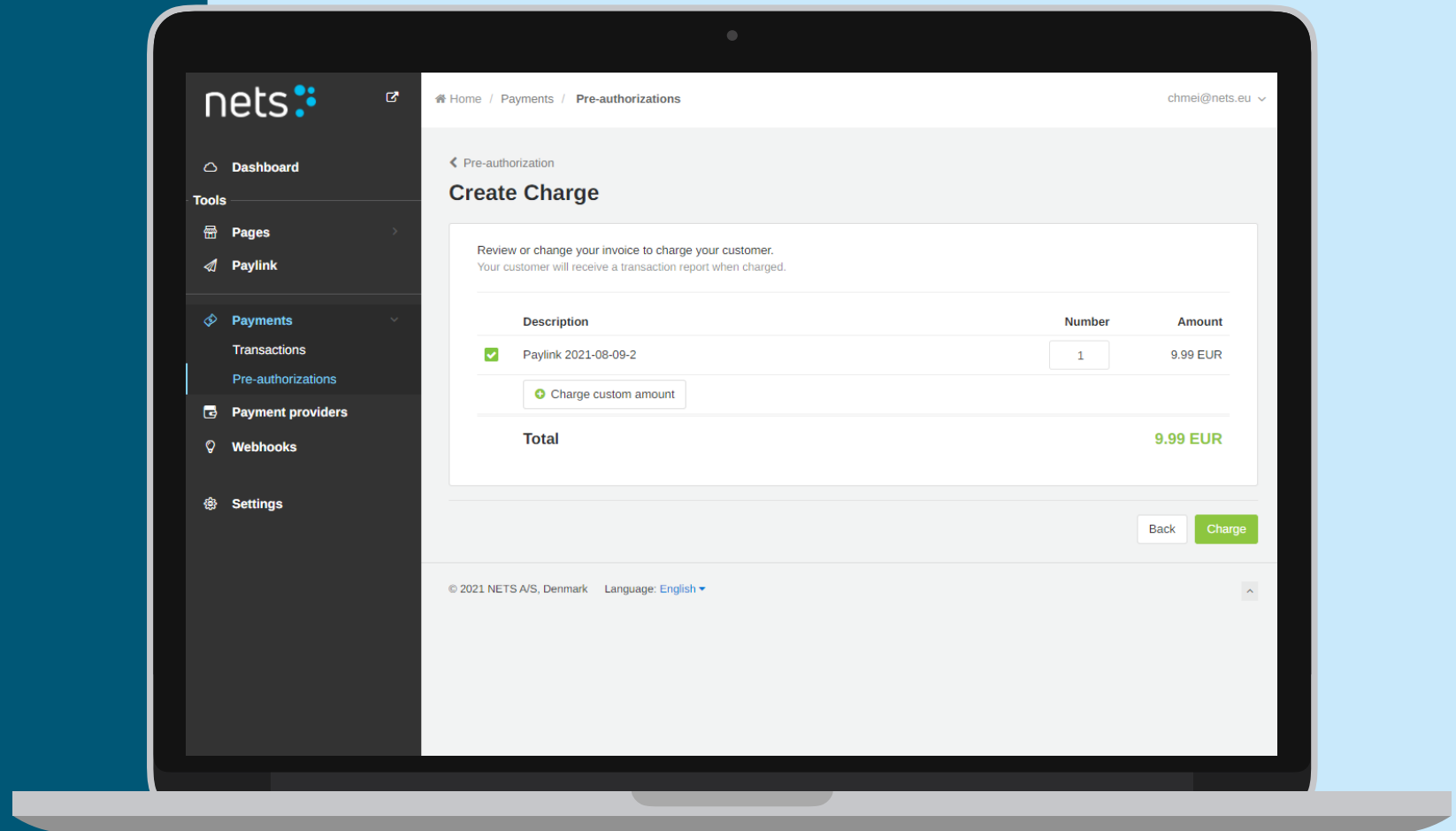
- Successful pre-authorizations can be charged via the Paylink portal.
- If you click on the desired pre-authorization the corresponding detail page will open.
- Via the green „Create Charge“ button you can initiate a charge.



# Payments



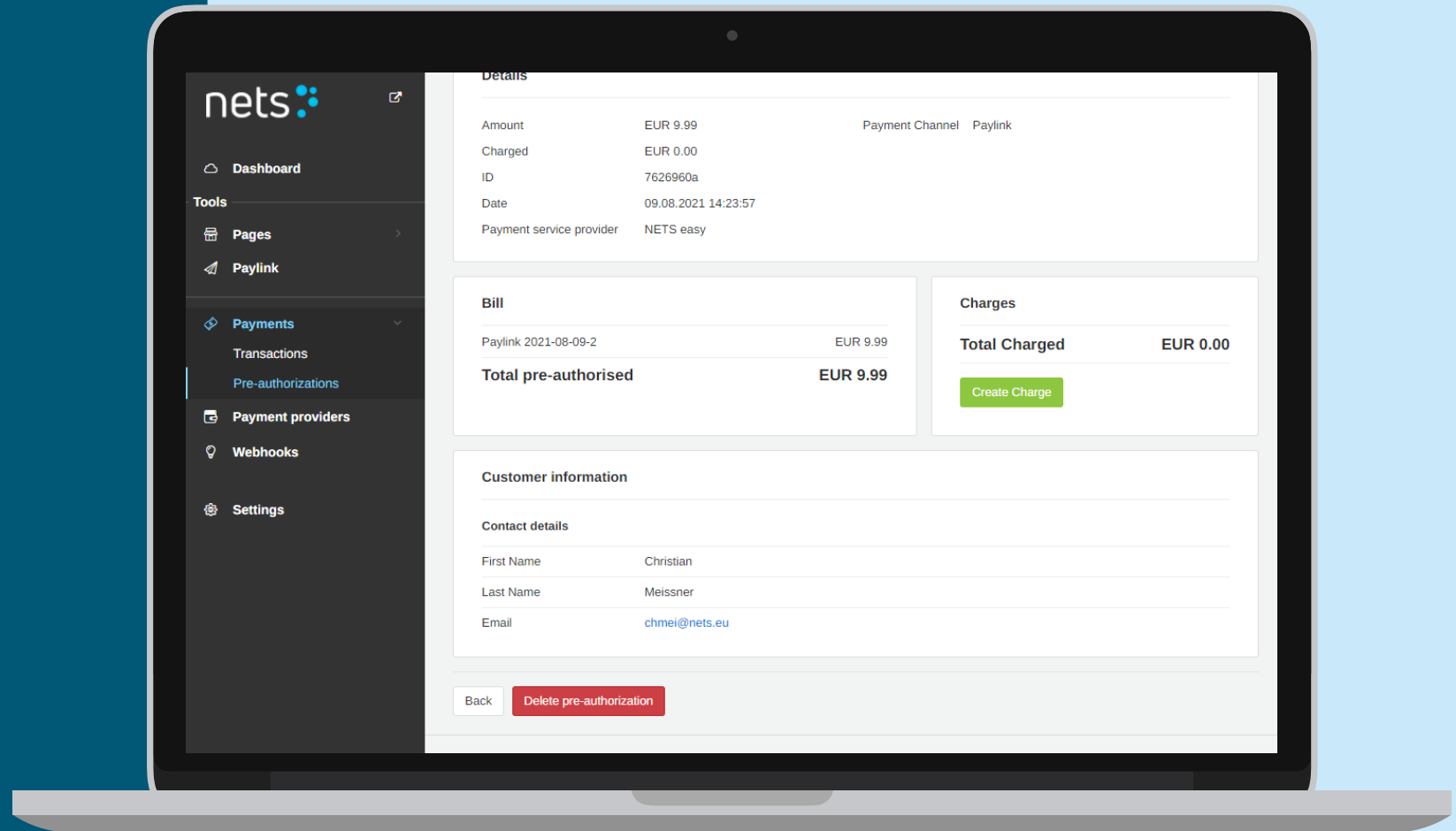
- You can either charge the pre-authorized amount or only a partial amount.
- For a partial charge select the „Charge custom amount“ option.



# Payments








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

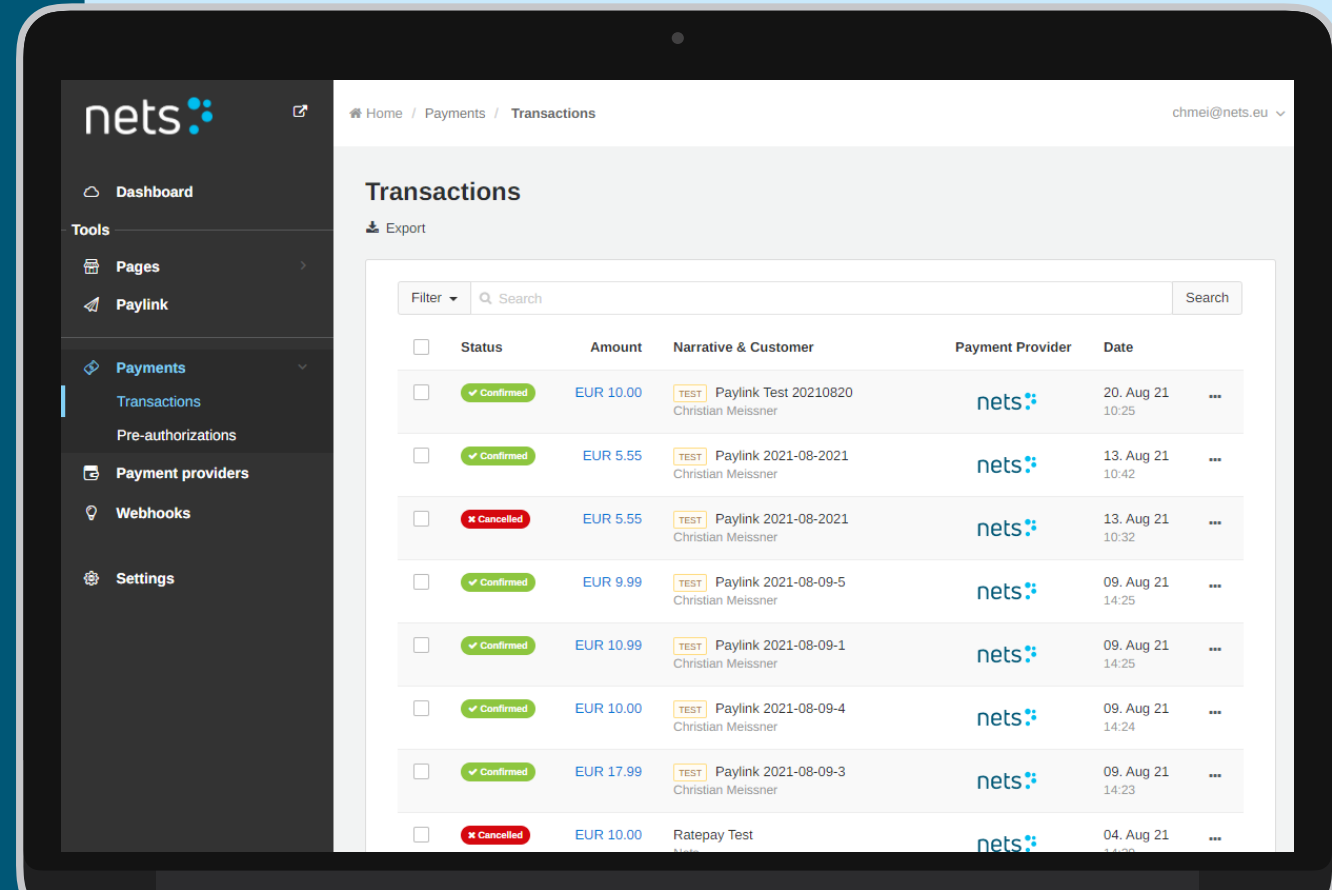


# Transactions



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





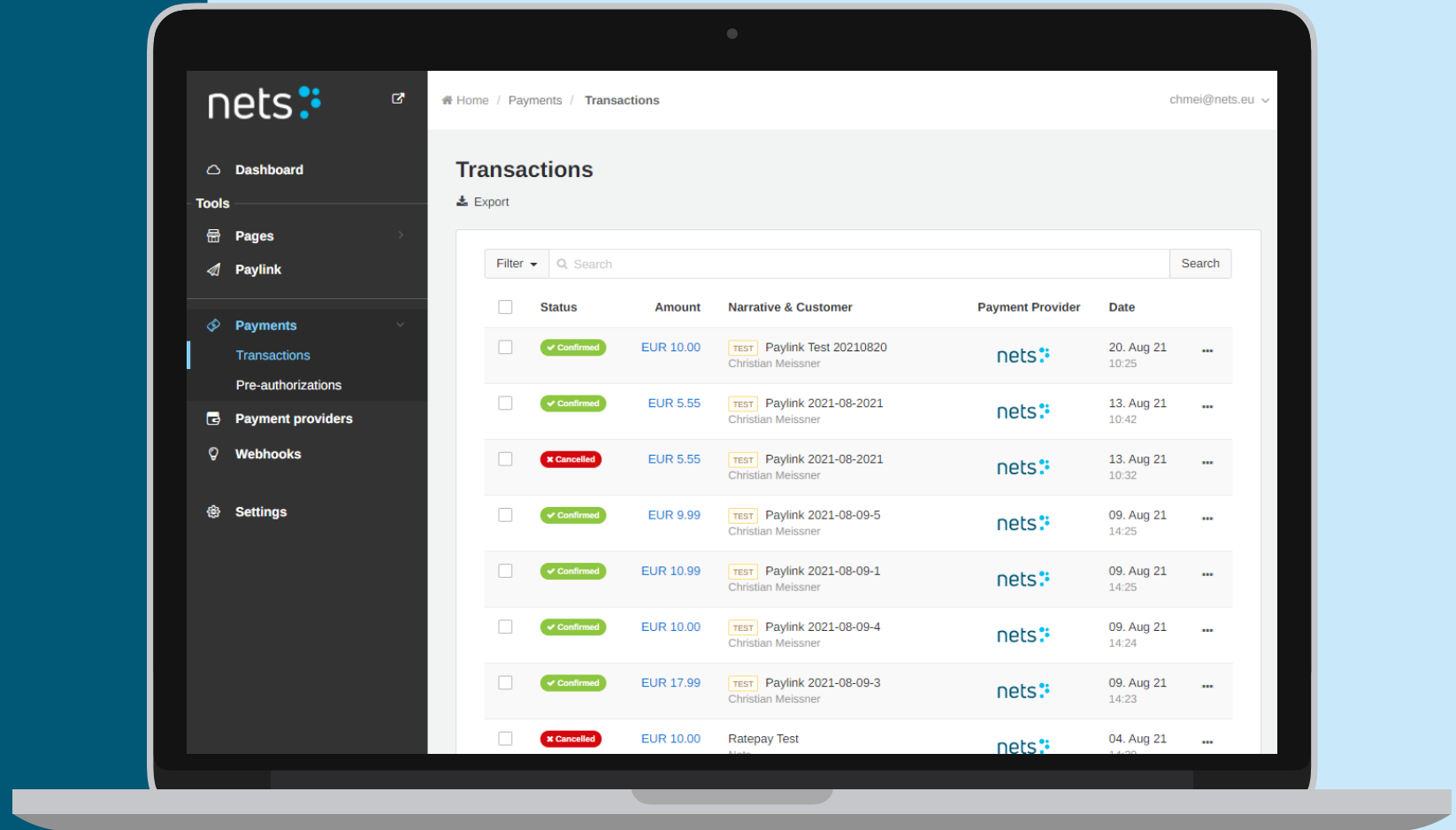
## ● Refund

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

# Refund



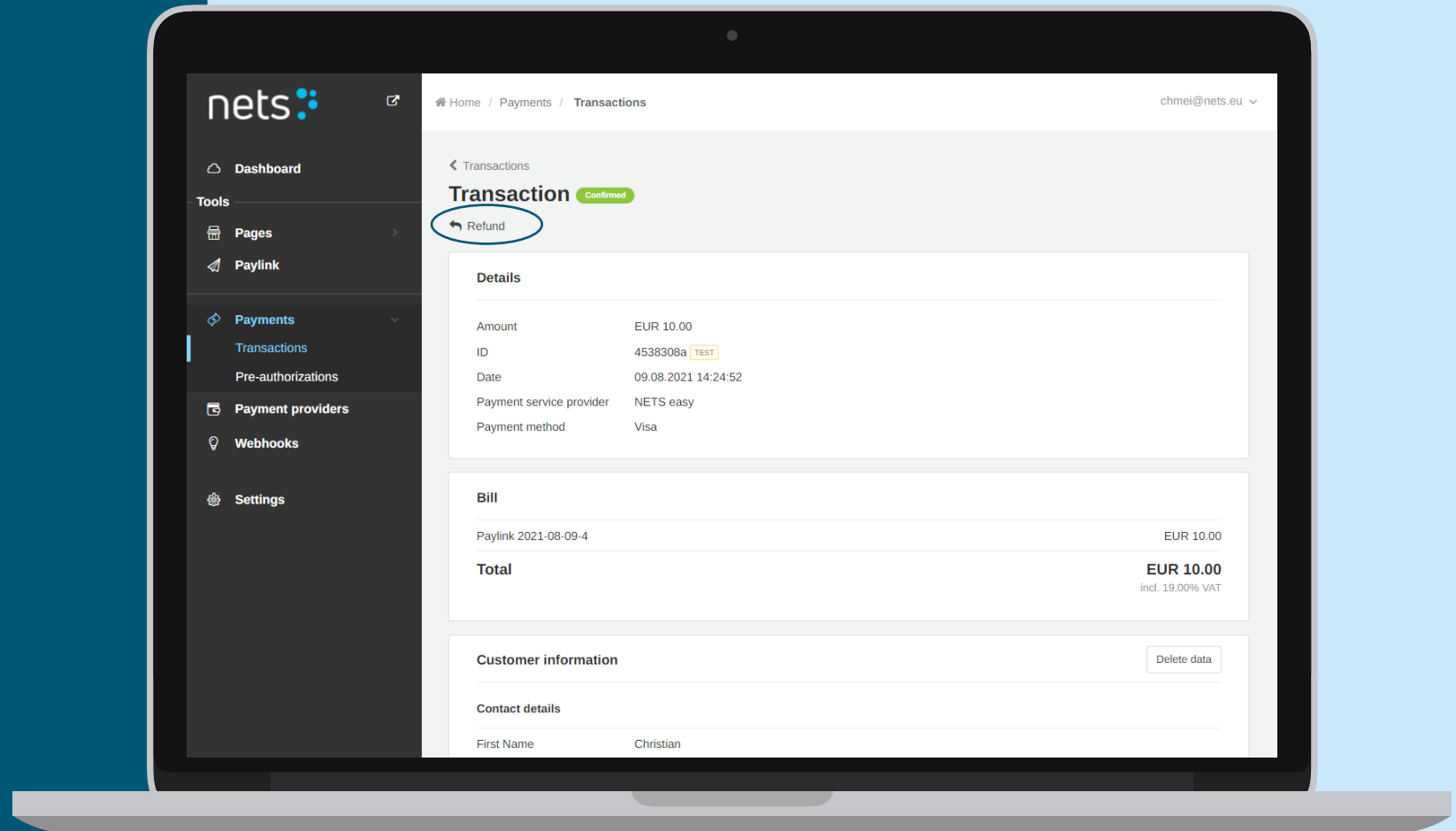
- Click on a successful transaction you would like to refund.



# Refund



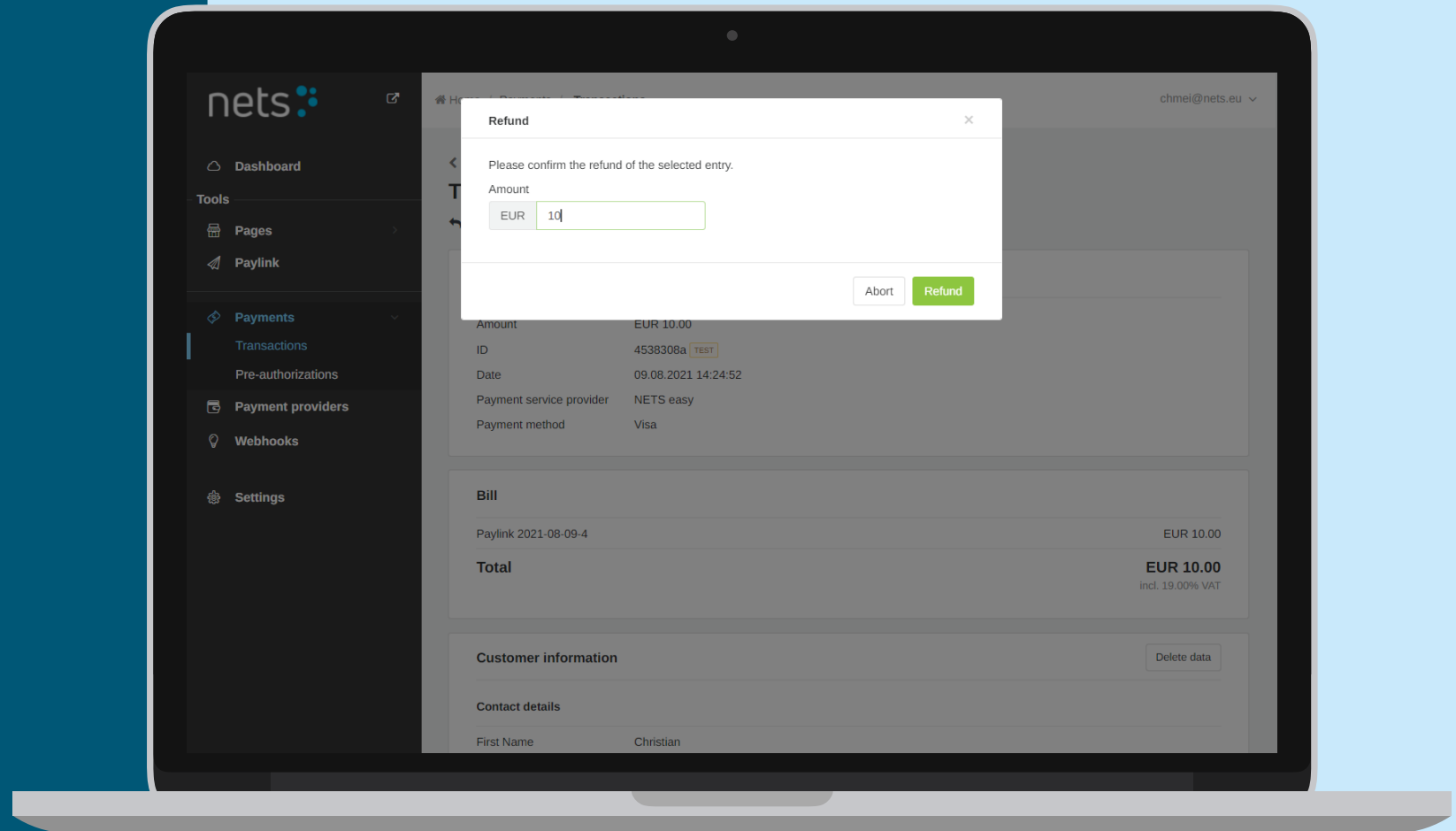
- Click on „Refund“.



# 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.







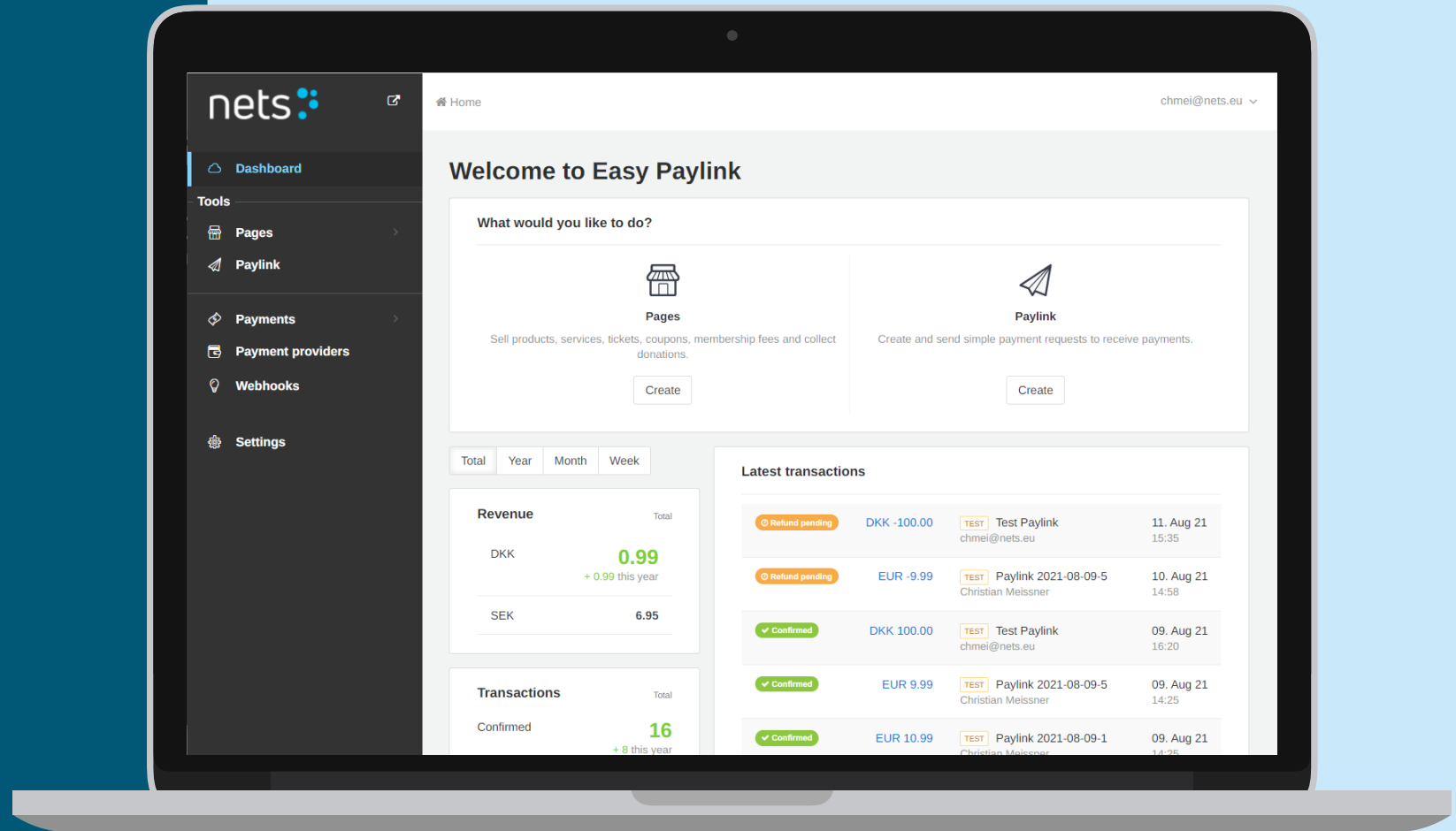
## Add user

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

# Add user



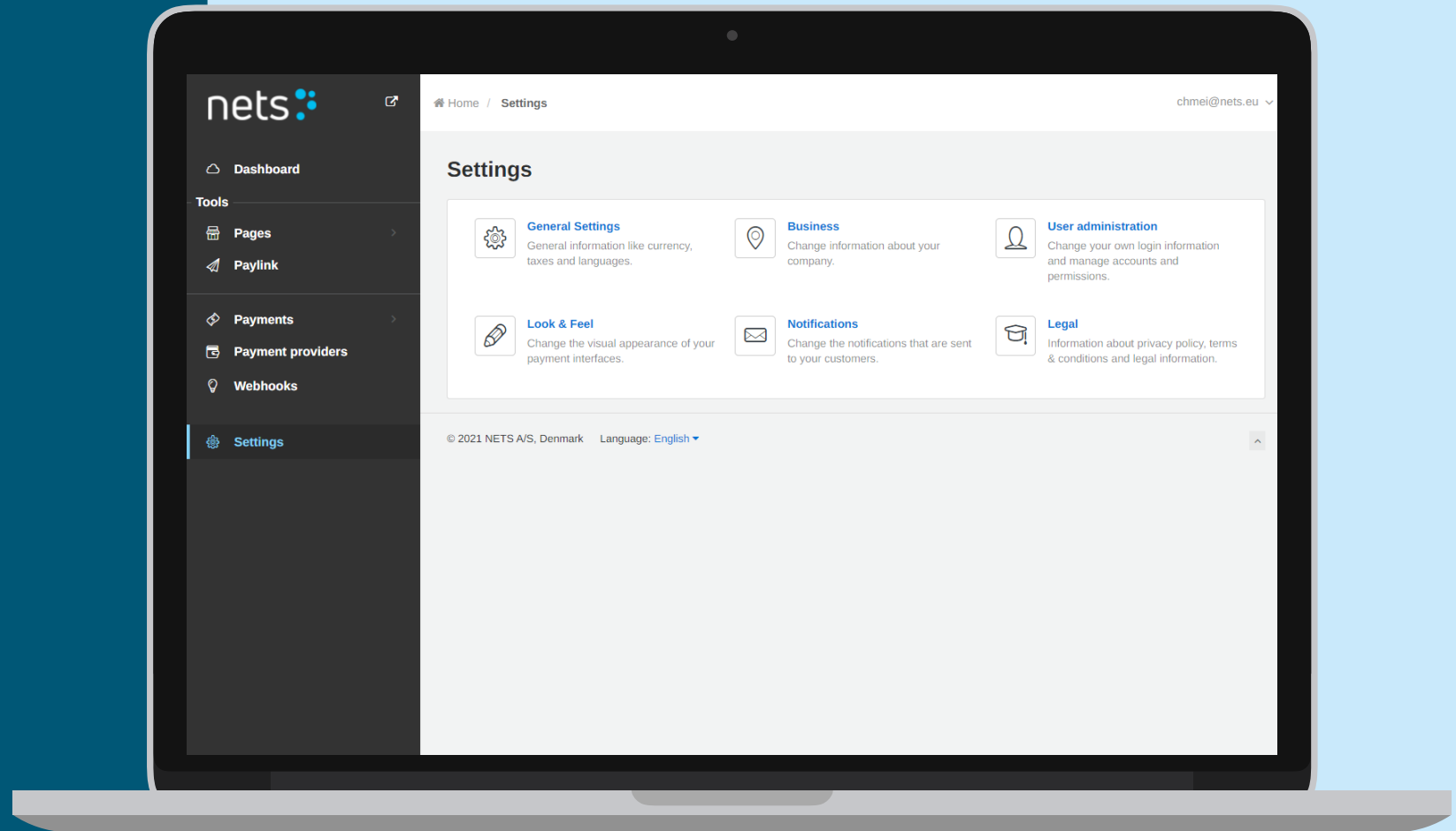
- Click on the „Settings“-tab on the left.



# Add user



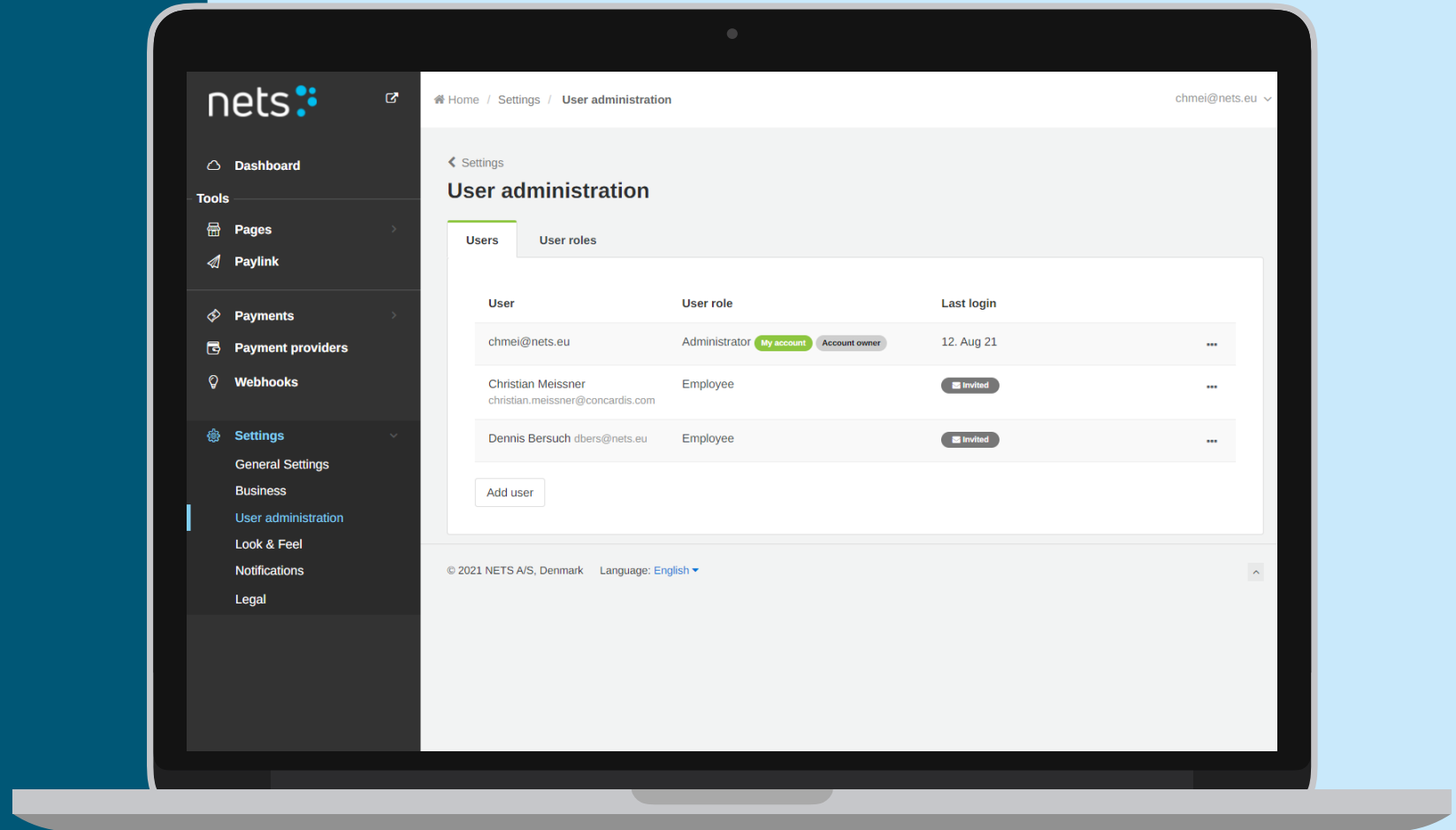
- Click on the „User Administration“-field.



# Add user



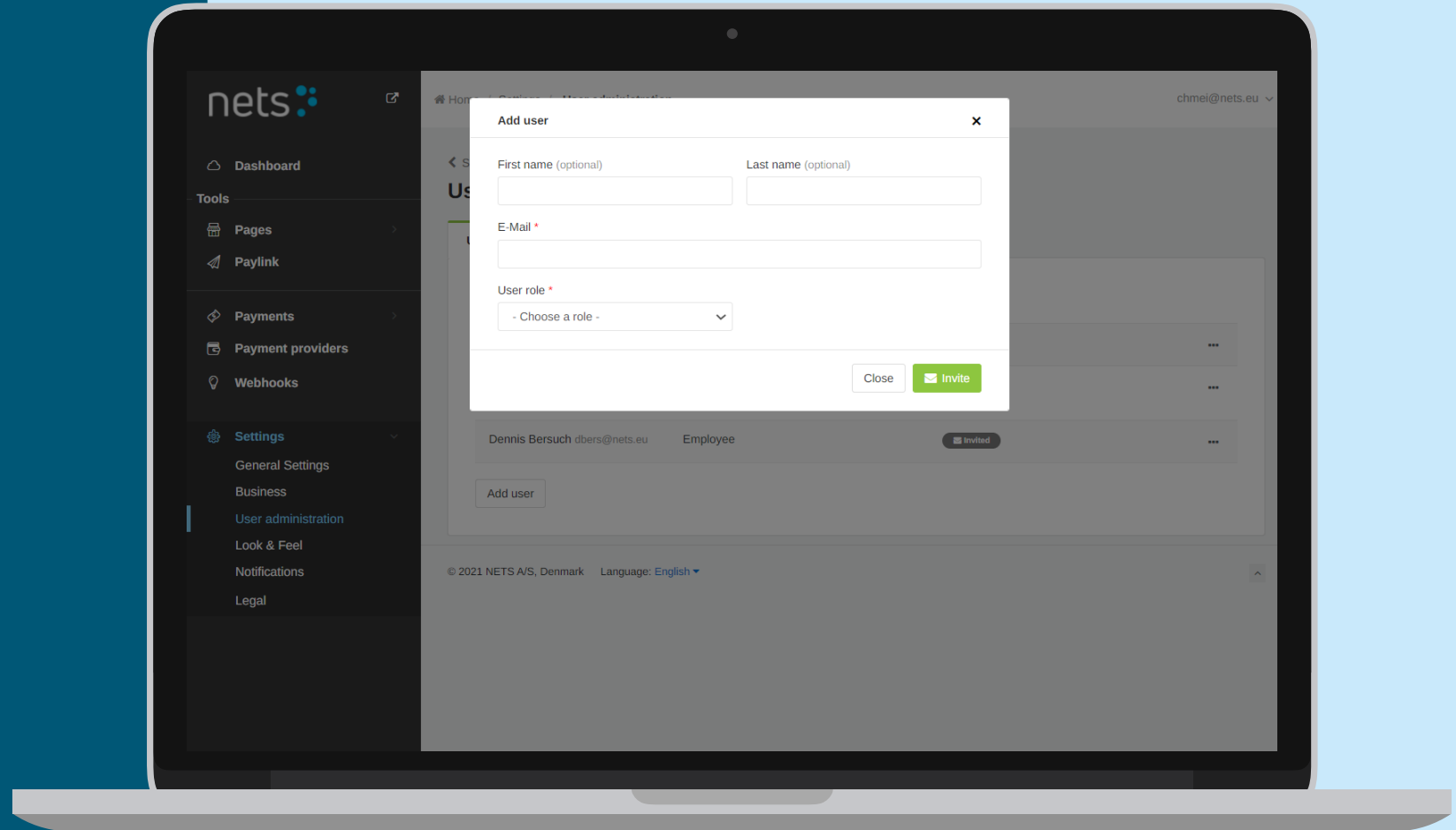
- Click on the „Add user“-button to create a new user.



# Add user



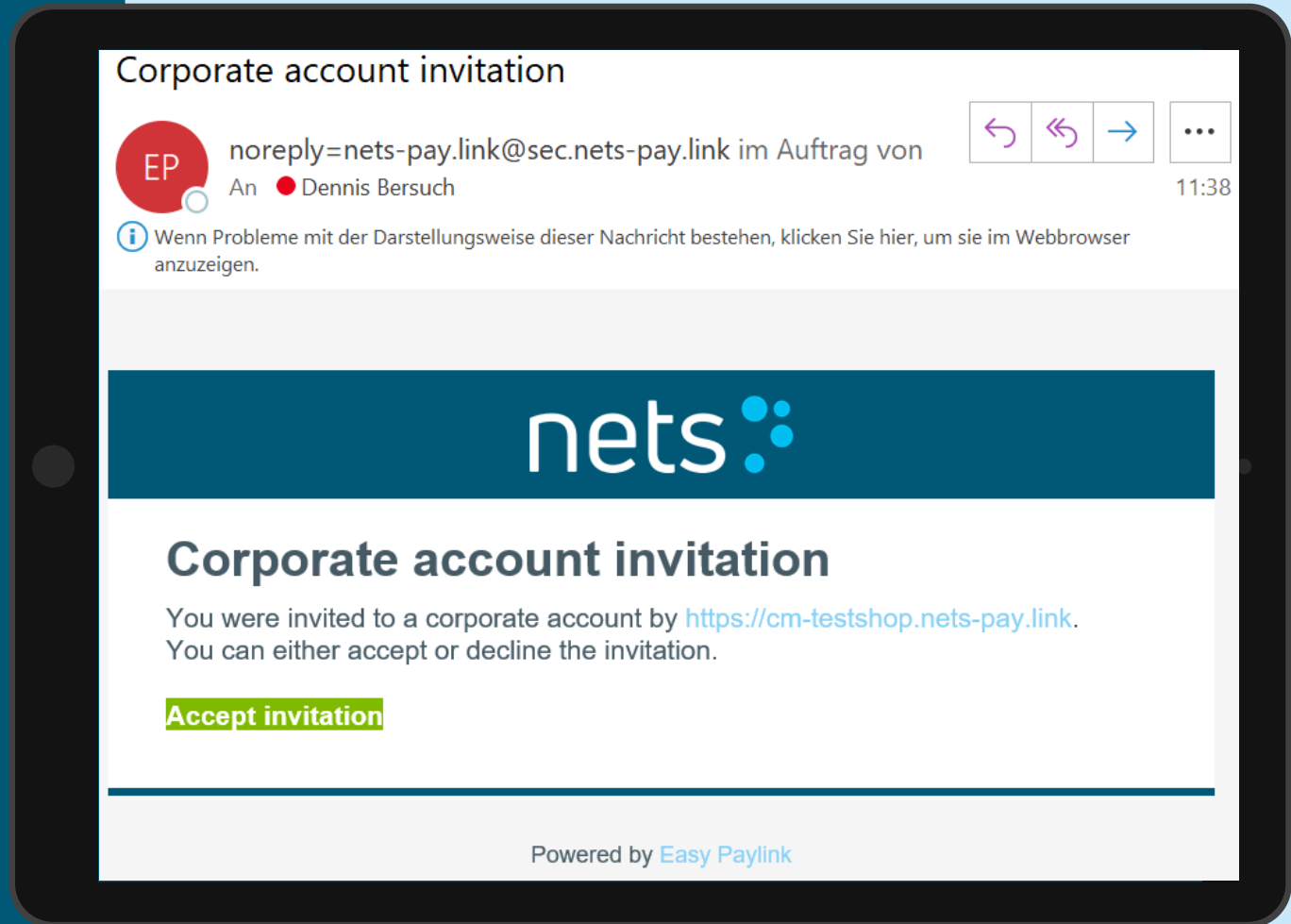
- Fill in all information about the user and click on the green „Invite“-button.



# 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.



# 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.

