User Guide

MerchantE Link to Pay in NetSuite

A guide to using Link to Pay with Hosted Payments as part of your MerchantE for SuitePayments bundle.

Table of Contents

*** - Included in SuiteEssentials**

1150 Sanctuary Parkway, Suite 300, Alpharetta, GA 30009

Key Contacts

Information/Assistance	Contact Info
After you have set up SuitePayments, if you have questions about payments, authorization, declines, settlement and chargebacks, contact MerchantE Customer Care.	help@MerchantE.com
If you have questions during set-up of MerchantE for SuitePayments, or learning how to use it, contact your MerchantE sales representative.	Your MerchantE Sales Representative
Questions about how to setup and use any of the MerchantE services.	MerchantE User Guide Library
With questions about other MerchantE products and services, contact your MerchantE sales representative. If you don't know who to contact, use the NetSuite@MerchantE.com mailbox.	Your MerchantE Sales Representative or NetSuite@MerchantE.com

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Versioning

March 2023	4.6	Added instructions for adding QR codes to invoices.
November 2022	4.5	Marked features include in SuiteEssentials.

Introduction

Link to Pay is an easy way to add ACH and card payment acceptance to any NetSuite invoice you send to your customers. It embeds a Link into your existing invoices or quotes to seamlessly direct cardholders to our **Hosted Payment Page (HPP)** on the secure MerchantE server. Once on our secure payment page, the cardholder enters their payment details and is provided a receipt after the payment is submitted and confirmed. The invoice record in NetSuite is immediately marked "paid." The service is simple to deploy and easy to maintain.

This User Guide gives you the information you need to get started quickly. To get started, you need to:

1. **Link to Pay Site Customization** - Customize your new payments page through the Hosted Payments **Admin Dashboard**.
2. **MerchantE for SuitePayments** - Ensure you have the most recent version of MerchantE for SuitePayments (Payment Gateway API).
3. **NetSuite Setup** - Follow the enclosed step-by-step instructions to enable your NetSuite email template to incorporate the Link to Pay.

Admin Dashboard

The **Admin Dashboard** is the admin section of the **Hosted Payment Page** (HPP), shown below. It enables you to customize the payment page and view transaction history and handle minor exception processing such as unlocking accounts. Using the credentials emailed to you as part of setting up Link to Pay, you can access the merchant dashboard by visiting here: hostedpayments.merchante.com.

* - Included in SuiteEssentials

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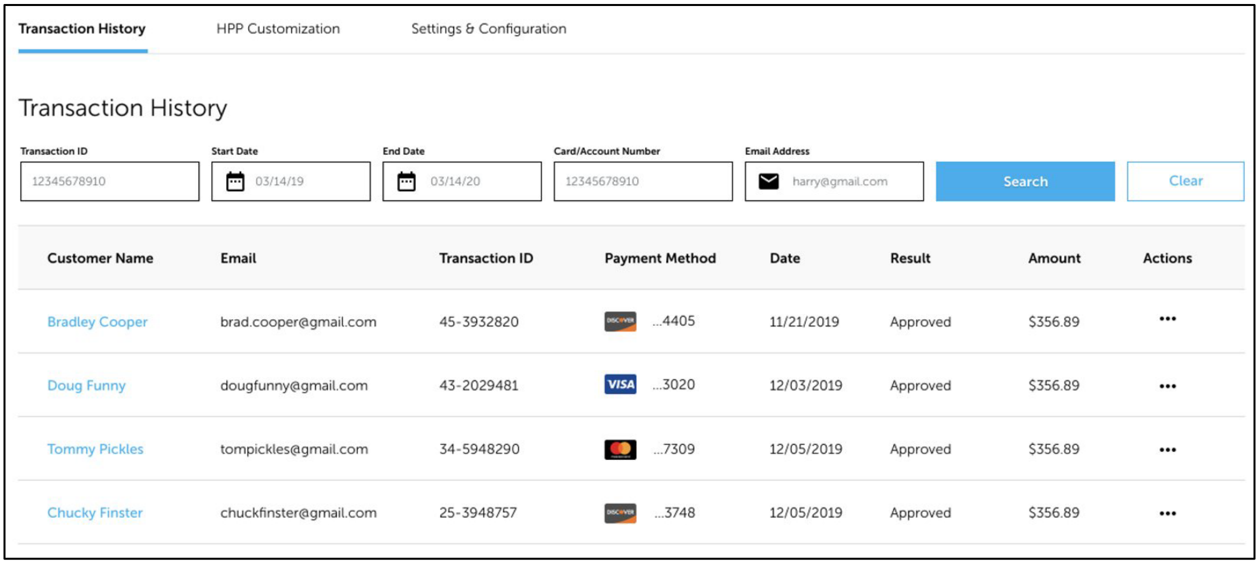
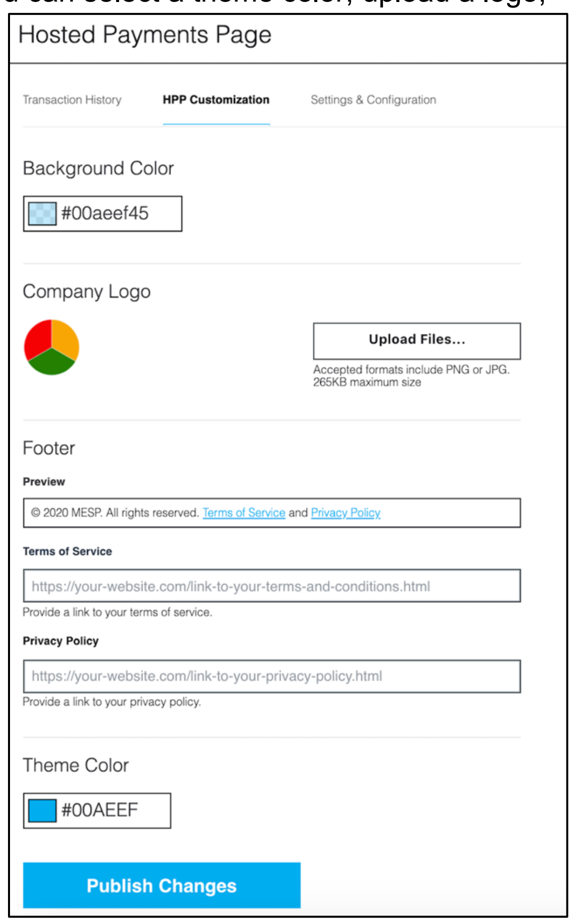


Step 1: Link to Pay Site Customization

The **HPP Customization** tab is the area where you can apply your brand to the look of the Hosted Payment Page that your customer sees. You can select a theme color, upload a logo, and add links to your company's Terms of Service and Policy.



Background Color

The background color dictates the color of the background on the checkout related screens. You can select a theme color by picking a color box or you can enter the hex code. The color box allows you to modify the color and the opacity of the background.

Company Logo

You can upload your logo by clicking on the Upload Logo Files button. Your image must be PNG, JPG, or GIF format. The file size cannot exceed 256KB. The image size is limited to 70 by 70 pixels.

Note: It is strongly recommended to have a company logo specified so that customers have the certainty they are still within your company's checkout flow.

Footer

The footer will appear at the bottom of your payment page. It will display your company name and all rights reserved. Additionally, you can upload your Terms of Service Policy and your Privacy Policy to your payment page. When one or both links are provided, we add the links to the footer.

Theme Color

The theme color controls, links, transaction amount, buttons, and user icon of the payment page and the customer dashboard. You can select a theme color by picking a color box or you can enter the hex code.

Settings and Configurations

The Setting and Configuration tab changes are not required. Link to Pay is preconfigured to ensure your Invoice/Quote payment page can accept customer payments. Link to Pay will generate the necessary payment links.

Caution: Custom Amount and Recurring Payments will be visible on the merchant dashboard but are disabled for Link to Pay transactions. Any changes to these settings will not apply. Customers will be required to pay their invoice in full. If you need recurring functionality, consider leveraging the NetSuite recurring billing feature.

Transaction History

NetSuite provides you with robust reporting and reconciliation of invoiced transactions. Hosted Payments also includes a **Transaction History** tab on the merchant dashboard where you have the ability to search for transaction(s), resend receipts, and reset customer's accounts. When you click on the tab, the page will display a list of your most recent transactions.

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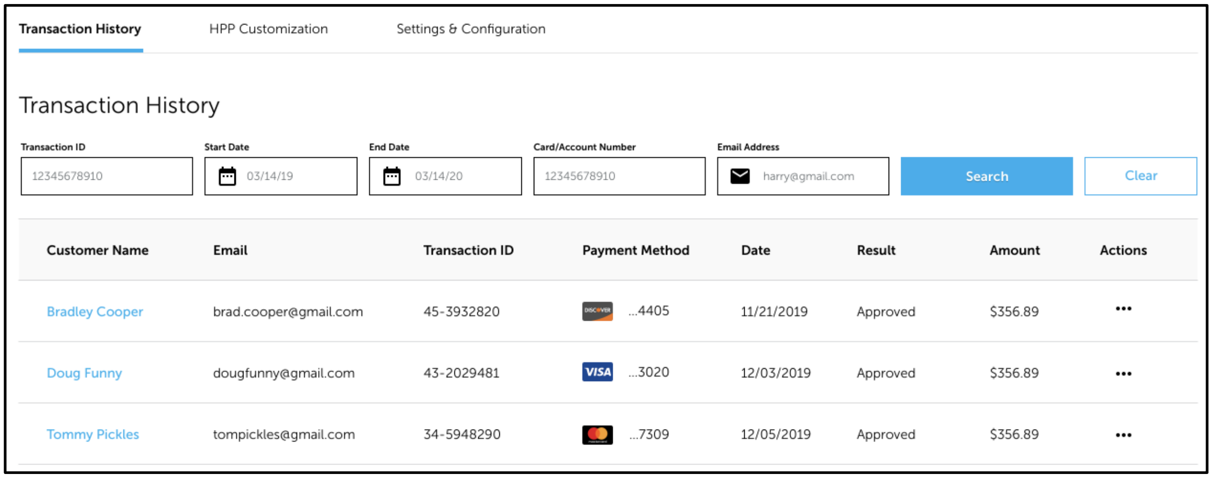


Each transaction is listed with:

- Customer Name
- Email Address
- Transaction ID
- Payment Method
- Transaction Date, Result
- Transaction Amount
- More (a link in the action column)

You can sort any of these columns except for the email address. It is important to note here that sorting on Payment Method sorts based on the entire card or account number. but we only display the last 4 digits for security purposes. When performing a searching on this value, the Admin will enter the last 4 digits of the card or account number. When you click on the More link, a dropdown menu will appear displaying a range of actions you can select for that transaction:

Menu Option	Function
Resend Receipt	The receipt for the selected transaction will be sent to the email address entered during checkout.
Unlock Account	This action unlocks a customer's account if needed.

MerchantE Reporting Portal

The **Merchant Reporting Portal** is provided to every merchant of Link to Pay. The website address and login credentials are identical to regular Link to Pay and are provided upon completion of the merchant application process.

The **Merchant Reporting Portal** adds the following functionality to Link to Pay:

• **View Unsettled Transactions -** Merchants can view real-time transactions which have been processed since the last batch close.

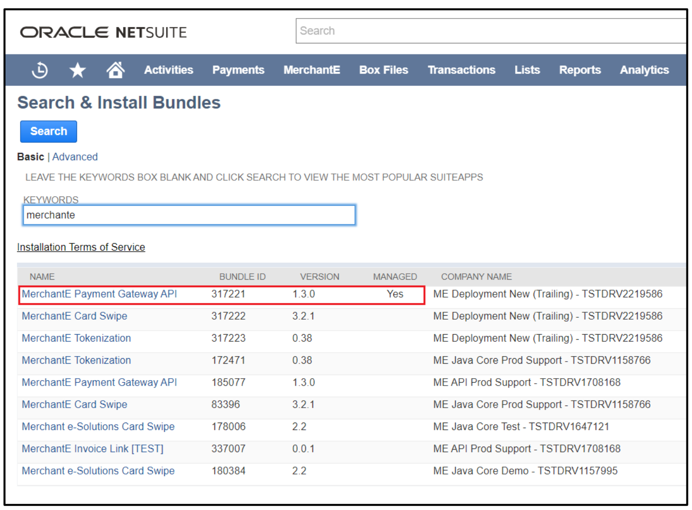
• **View Rejected Transactions -** Similar to Unsettled Transactions, a merchant can view rejected or declined transactions, including a description of why the transaction failed.

In addition, the administrative section allows for customization of settings to reject transaction due to a mismatch between the billing address provided and the address on file with the card issuer, and/or CVV mismatch.

Step 2: MerchantE for SuitePayments

Link to Pay is integrated with versions 1.3.0 and higher of the MerchantE Payment Gateway API bundle. No action is needed if this bundle is installed on your NetSuite account.

If this bundle is not installed on your account:
Navigate: NetSuite → Customization → SuiteBundler → Search & Install Bundles



When the list comes up, search for MerchantE Payment Gateway API and click in the name of the bundle. The Bundle Details page will load, shown below:

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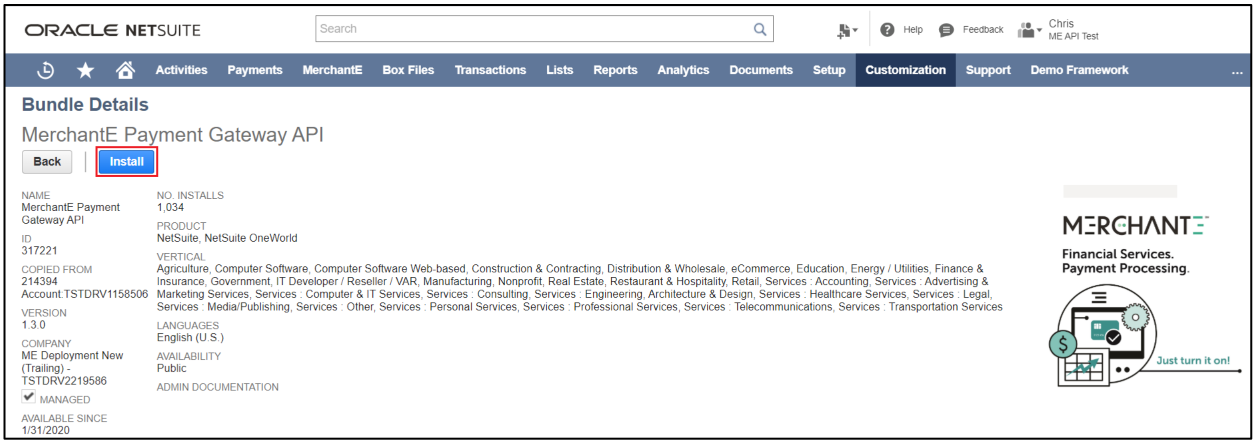


Click on the **Install** button to load the most recent version of MerchantE Payment Gateway API to your account.

Step 3: NetSuite Setup

*Link to Pay Configuration

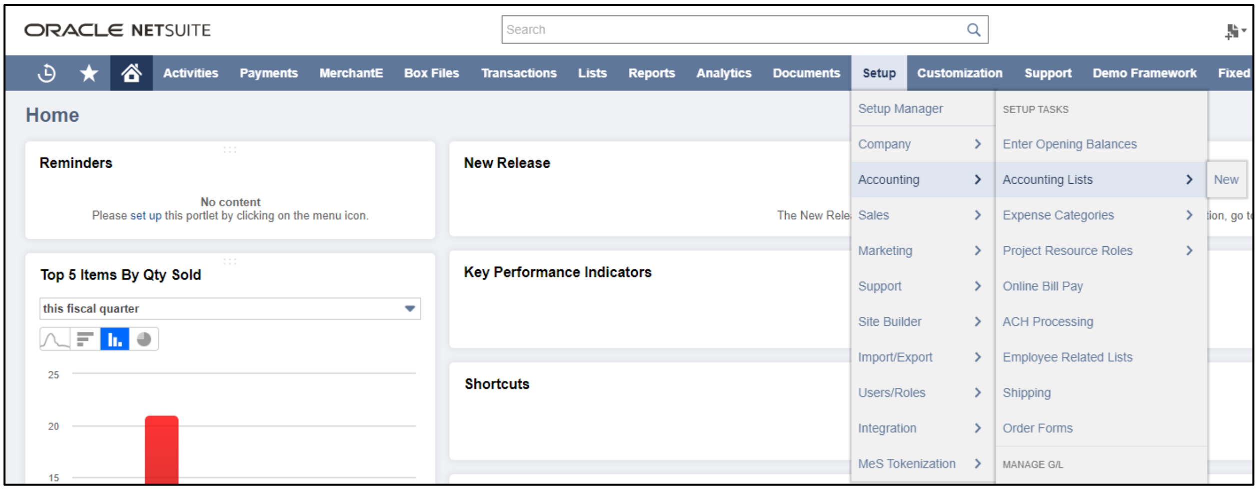
Link to Pay utilizes its own configuration within NetSuite to ensure a payment link is generated for your Invoices and Quotes.

Setup a new user ID in Business Platform (BP)

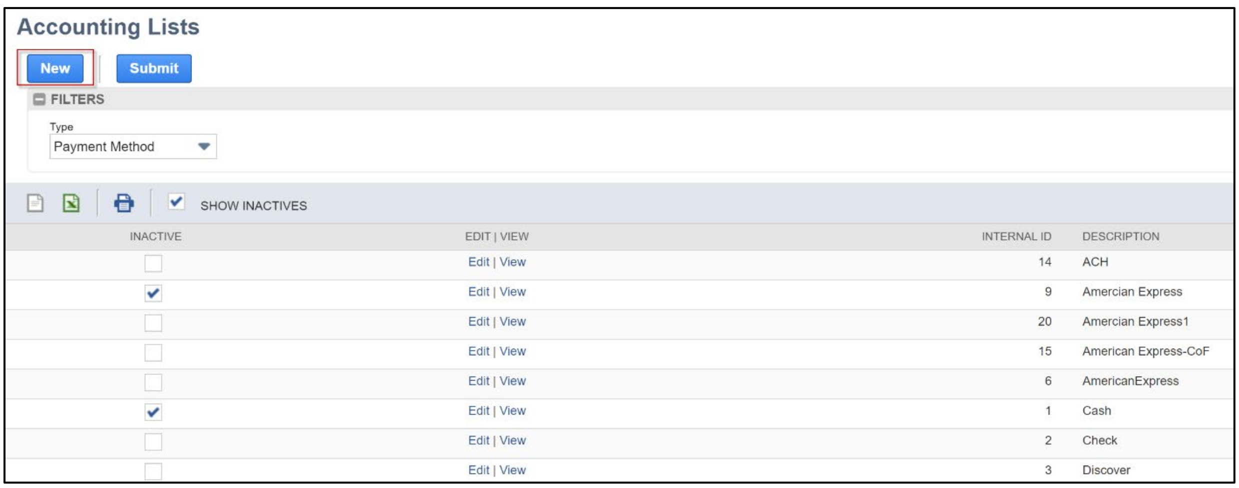
1. Under **19. Users Pointed At This Merchant Number** click on **Create a new user for this Merchant Number**.
    a. Enter a **User ID**:
    b. Use the Merchant ID (MID) with "IL" at the end to create the ID, for example 123456789IL.
    c. Enter a **User Name**:
        i. Use the DBA name listed in the **Contact Nm** field under **1. Merchant Information**, ie. ACME.
    d. Enter an **Email Address**:
        i. Choose a User Email address listed in **1. Merchant Information**.
    e. Select **MES Merchant User w/HPP** from the User Type dropdown menu.
2. Click **Submit**.
3. Follow the steps required to create a password for that user and note the information to be used during the configuration setup process.

Set up a new payment method in NetSuite.

Navigate: NetSuite → Setup → Accounting → Accounting Lists



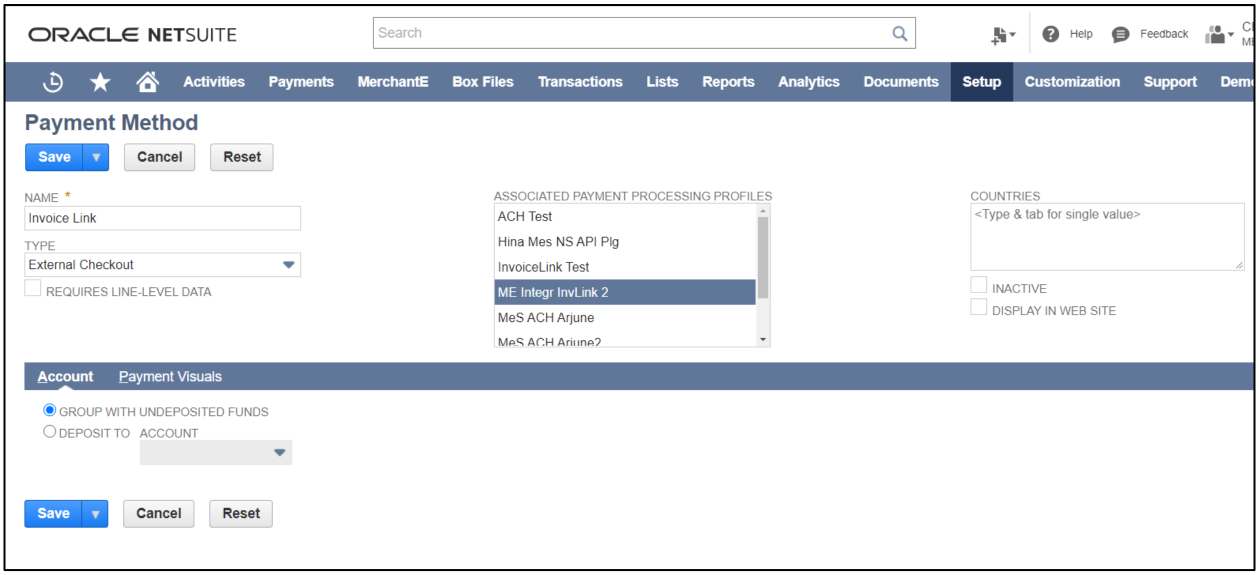
1. In the **Filters** section under **Type** use the dropdown to select **Payment Method** then select **New**.



2. On the **Payment Method** screen name the payment method something that the merchant will recognize, for example **"Link to Pay"**.

    a. Under **Type,** use the dropdown to set the type to **External Checkout**.

    b. Under Associate Payment Processing Profiles, use the dropdown to highlight the associated processing profile for Link to Pay.

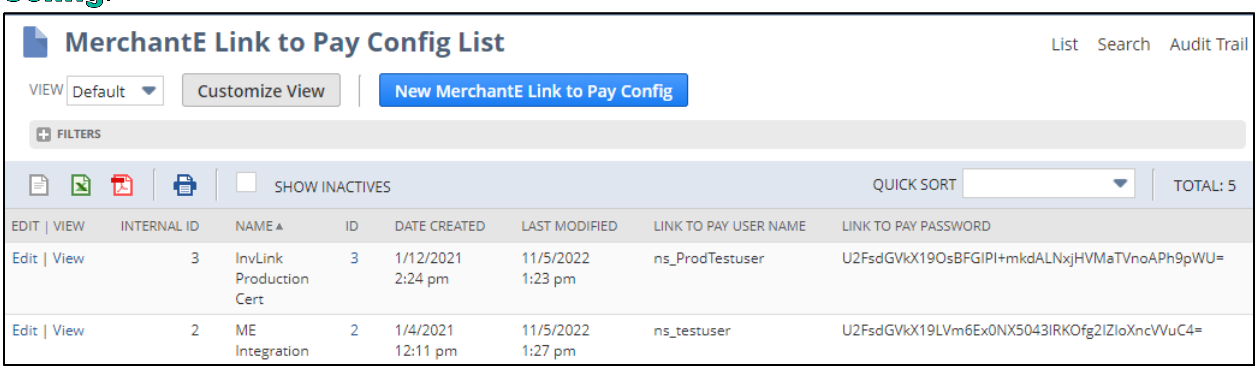


c. Click **Save**.

Once the Payment Method and the new user ID have been created you are ready to set up the configuration of the Link to Pay. To do this, type in **"MerchantE Link to Pay Config"** in the search box.

On the **Global Search: Results** you will see **MerchantE Link to Pay Config**. Click Edit.

On the MerchantE Link to Pay Config List screen click **New MerchantE Link to Pay Config**.



On the **MerchantE Link to Pay Config**, screen enter details in all required fields.

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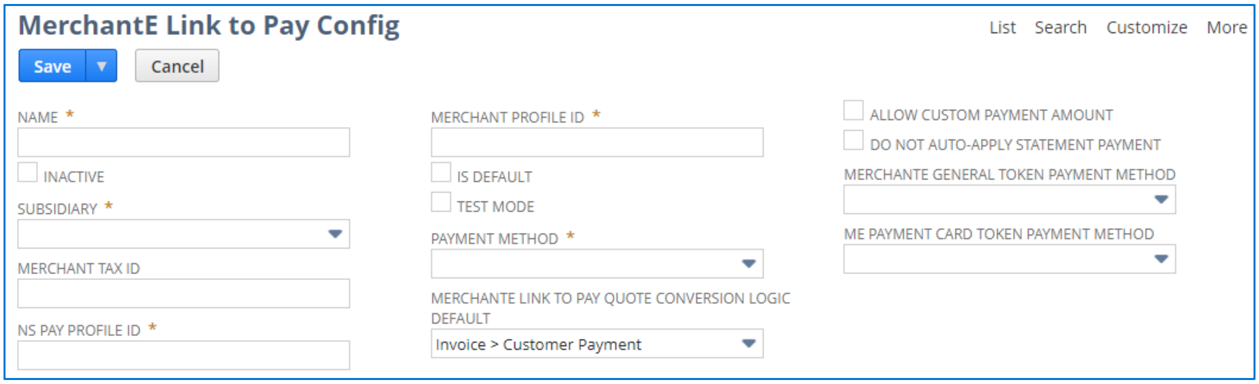

1. **Name -** Enter a name for the configuration. For example, Link to Pay.
2. **Subsidiary -** Select the subsidiary of the merchant.
3. **Merchant Tax ID** - Enter the appropriate Tax ID. This is for L2/L3 data.
4. **NS Profile ID** - Add internal ID associated to the NS payment profile.
5. **Merchant Profile ID -** Enter the MerchantE Profile ID from the Business Portal.
6. **Is Default** - Enable to make all invoices under this subsidiary have the same Link to Pay link.
7. **Test Mode** - Enabled the endpoints used will be test endpoints.
8. **Payment Method -** Choose the Link to Pay payment method you just set up.
9. **Allow Custom Payment Amount** - Enable if you want to give your customers the flexibility to choose payment amount on future invoices.
10. **Do Not Auto-Apply Statement Payment** - Enable to prevent payments from being automatically applied.
11. **MerchantE General Token Payment Method** - Select a payment method.
12. **ME Payment Card Token Payment Method** - Select a payment method.

Note: if disabled, payments must be manually applied to invoices.

13. Click **Save**.

Email Templates

MerchantE Link to Pay utilizes the Advanced PDF/HTML Templates feature in NetSuite. This feature supports more customization capabilities than other template options you might know, such as Transaction Form Layouts (also known as Basic Layouts and Legacy Layouts.)

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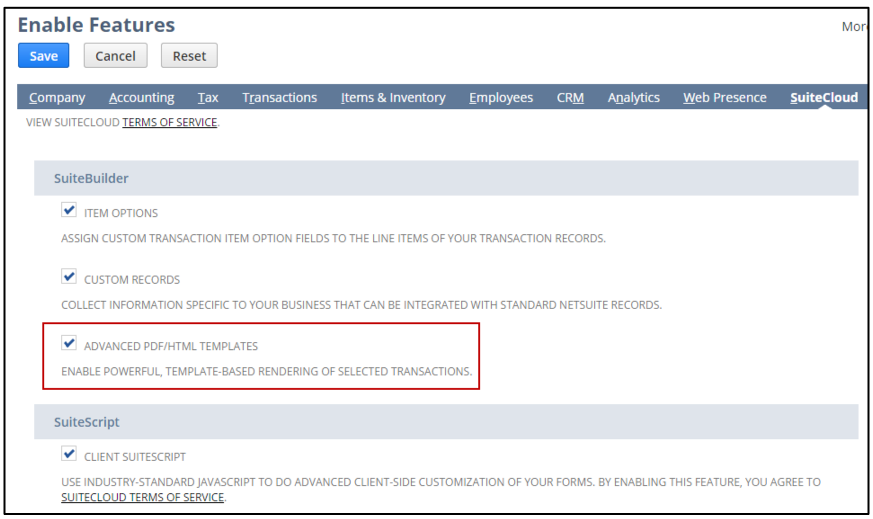
When the Advanced PDF/HTML Templates feature is enabled, you can associate advanced templates with custom transaction forms, using these templates to format printed and email versions of transactions. For more information on this topic, see [Setting Custom Forms to Use Advanced Templates]() and [Advanced PDF/HTML Templates](). However, everything you need to set up your Link to Pay is described below.

Enable Advanced PDF/HTML Templates

The Advanced PDF/HTML Templates feature must be enabled for access to advanced templates and the template editor and is enabled by default in most customer accounts.

Ensure that the Advanced PDF/HTML Templates feature is enabled.
Navigate: NetSuite → Setup → Company → Enable Features

On the **SuiteCloud** tab, under **SuiteBuilder**, ensure that the **Advanced PDF/HTML Templates** box is checked.



*Customizing Advanced Templates

When the **Advanced PDF/HTML Templates** feature is enabled, an Advanced PDF/HTML Templates option is available in the **Forms** menu of the **Customization** screen. You can click this option to view a list of the advanced templates in your account.

Note: The Advanced PDF/HTML Templates menu option is only available to account administrators and other users who have the Advanced PDF/HTML Templates permission. This is a Setup type permission with

only one level: Full. For details about permissions, see [NetSuite Permissions Overview](#).

Standard templates are provided for each supported print type. You can create your own customized templates in a Template Editor that supports current industry standards for HTML-based editing, including rich text editing and HTML markup source editing. You can preview your template as you make changes, and detailed error messages are shown if the template cannot be saved.

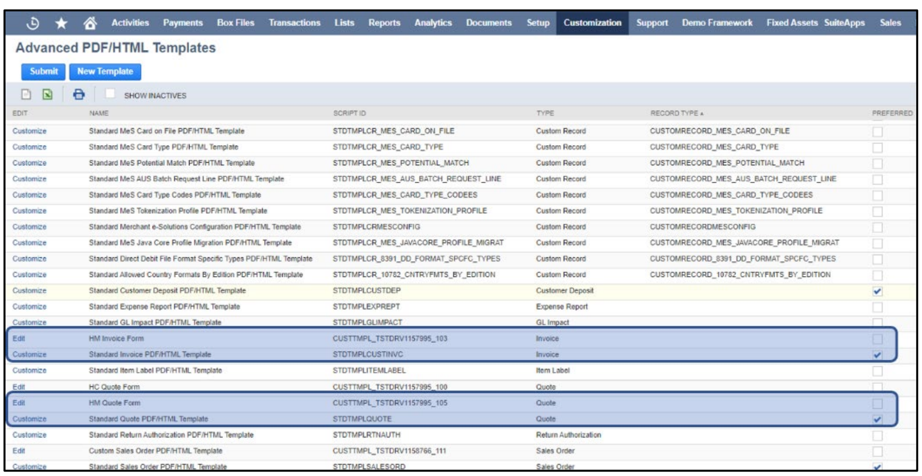
The **Advanced PDF/HTML Templates** list page includes standard advanced templates and any customized advanced templates that have been created in the account. To update your email templates, you should find the installed forms that show either Invoice or Quote in the **Type** column.

Note: Make sure to note the name of the template that was updated to be added as part of the invoice and quote creation processes.

Adding a Link to Pay Link

Navigate: NetSuite → Customization → Forms → Advanced PDF/HTML Templates

1. From the **Forms** submenu of the **Customization** menu, select **Advanced PDF/HTML Templates**. The **Advanced PDF/HTML Templates** list appears.



EDIT	NAME	SCRIPT ID	TYPE	RECORD TYPE ▲	PREFERRED
Customize	Standard MeS Card on File PDF/HTML Template	STDTMPLCR_MES_CARD_ON_FILE	Custom Record	CUSTOMRECORD_MES_CARD_ON_FILE	☐
Customize	Standard MeS Card Type PDF/HTML Template	STDTMPLCR_MES_CARD_TYPE	Custom Record	CUSTOMRECORD_MES_CARD_TYPE	☐
Customize	Standard MeS Potential Match PDF/HTML Template	STDTMPLCR_MES_POTENTIAL_MATCH	Custom Record	CUSTOMRECORD_MES_POTENTIAL_MATCH	☐
Customize	Standard MeS AUS Batch Request Line PDF/HTML Template	STDTMPLCR_MES_AUS_BATCH_REQUEST_LINE	Custom Record	CUSTOMRECORD_MES_AUS_BATCH_REQUEST_LINE	☐
Customize	Standard MeS Card Type Codes PDF/HTML Template	STDTMPLCR_MES_CARD_TYPE_CODEES	Custom Record	CUSTOMRECORD_MES_CARD_TYPE_CODEES	☐
Customize	Standard MeS Tokenization Profile PDF/HTML Template	STDTMPLCR_MES_TOKENIZATION_PROFILE	Custom Record	CUSTOMRECORD_MES_TOKENIZATION_PROFILE	☐
Customize	Standard Merchant e-Solutions Configuration PDF/HTML Template	STDTMPLCRMESCONFIG	Custom Record	CUSTOMRECORDMESCONFIG	☐
Customize	Standard MeS Java Core Profile Migration PDF/HTML Template	STDTMPLCR_MES_JAVACORE_PROFILE_MIGRAT	Custom Record	CUSTOMRECORD_MES_JAVACORE_PROFILE_MIGRAT	☐
Customize	Standard Direct Debit File Format Specific Types PDF/HTML Template	STDTMPLCR_8391_DD_FORMAT_SPCFC_TYPES	Custom Record	CUSTOMRECORD_8391_DD_FORMAT_SPCFC_TYPES	☐
Customize	Standard Allowed Country Formats By Edition PDF/HTML Template	STDTMPLCR_10782_CNTRYFMTS_BY_EDITION	Custom Record	CUSTOMRECORD_10782_CNTRYFMTS_BY_EDITION	☐
Customize	Standard Customer Deposit PDF/HTML Template	STDTMPLCUSTDEP	Customer Deposit		✓
Customize	Standard Expense Report PDF/HTML Template	STDTMPLEXPREPT	Expense Report		☐
Customize	Standard GL Impact PDF/HTML Template	STDTMPLGLIMPACT	GL Impact		☐
Edit	HM Invoice Form	CUSTTMPL_TSTDRV1157995_103	Invoice		☐
Customize	Standard Invoice PDF/HTML Template	STDTMPLCUSTINVC	Invoice		✓
Customize	Standard Item Label PDF/HTML Template	STDTMPLITEMLABEL	Item Label		☐
Edit	HC Quote Form	CUSTTMPL_TSTDRV1157995_100	Quote		☐
Edit	HM Quote Form	CUSTTMPL_TSTDRV1157995_105	Quote		☐
Customize	Standard Quote PDF/HTML Template	STDTMPLQUOTE	Quote		✓
Customize	Standard Return Authorization PDF/HTML Template	STDTMPLRTNAUTH	Return Authorization		☐
Edit	Custom Sales Order PDF/HTML Template	CUSTTMPL_TSTDRV1158766_111	Sales Order		☐
Customize	Standard Sales Order PDF/HTML Template	STDTMPLSALESORD	Sales Order		✓

2. Select Edit to make changes to an Advanced PDF/HTML Template.

3. From the **Form Editor** screen, add the example code snippet to insert Link to Pay into the template.

```
<#if record.custbody_mes_invl_end_customer_link?has_content>
          <a href="${record.custbody_mes_invl_end_customer_link}"
target="_BLANK">Click Here to Pay Now</a>
</#if>
```

In this example, the link will look like this: Click Here to Pay Now

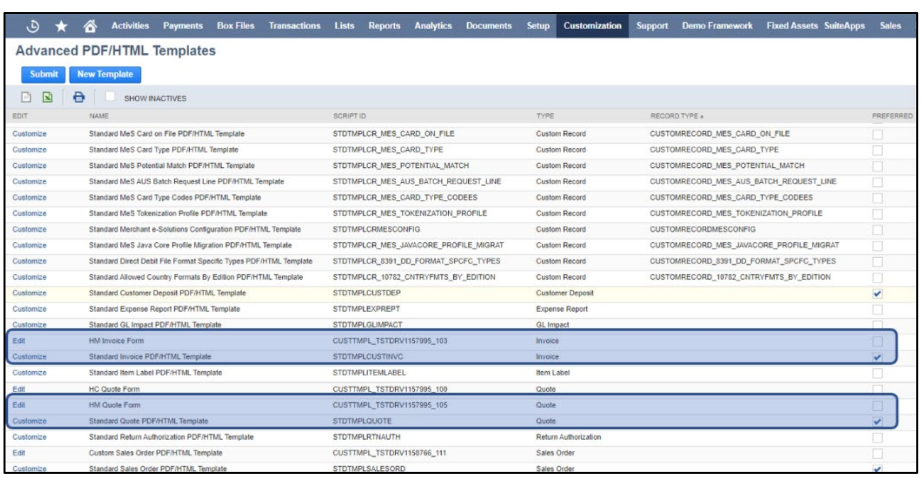
4. Click the **Preview** button to view a sample your template.

5. Click **Save**.

Adding a Link to Pay QR Code

Navigate: NetSuite → Customization → Forms → Advanced PDF/HTML Templates

1. From the **Forms** submenu of the **Customization** menu, select **Advanced PDF/HTML Templates**.



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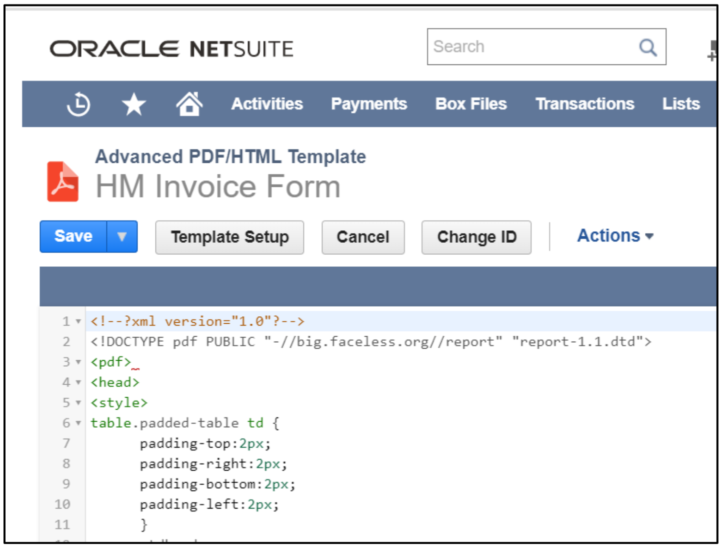
2. Select Edit to make changes to an Advanced PDF/HTML Template.



3. From the **Form Editor** screen:

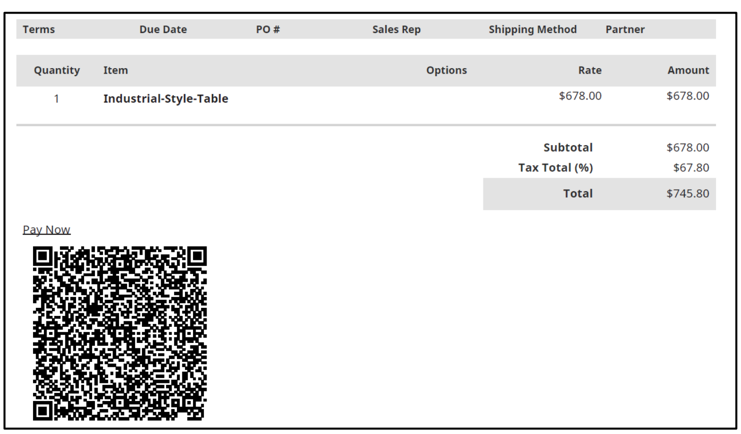
   a. To add the QR code to statement links, after `<a href="${meURL}&meGo-t">Pay Link Text</a>` and inside the `<#if meURL?has_content>` statement add the following code snippet.

```
<barcode codetype="qrcode" showtext="false" height="150" width="150"
value="${meURL}&amp;meGo=T" />
```

   b. To add the QR code to Link to Pay transaction links, after `<a href="${record.custbody_mes_invl_end_customer_link}">Pay Link Text</a>` add the following code snippet.

```
<barcode codetype="qrcode" showtext="false" height="150" width="150"
value="${record.custbody_mes_invl_end_customer_link}" />
```

4. Click the **Preview** button to view a sample your template.



5. Click **Save**.

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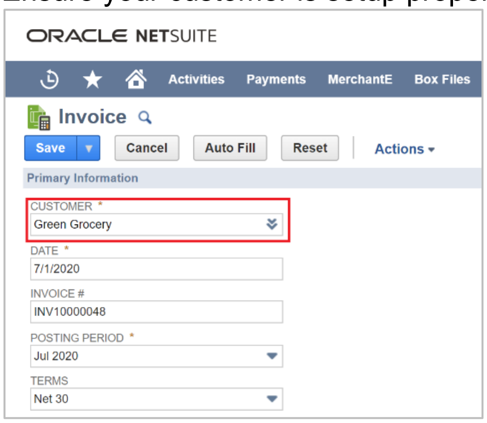
Creating an Invoice or Quote

Use the following links to reference the comprehensive documentation provided by NetSuite related to invoices and quotes:
Invoice Help Page

Quote Help Page

Ensure your customer is setup properly.



- If the customer type is an **individual**, input the customer's First/Middle/Last Name and an email address in the customer record.

- If the customer type is a **company**, input the customer's First/Middle/Last name and an email address of the Primary Contact under the customer record.

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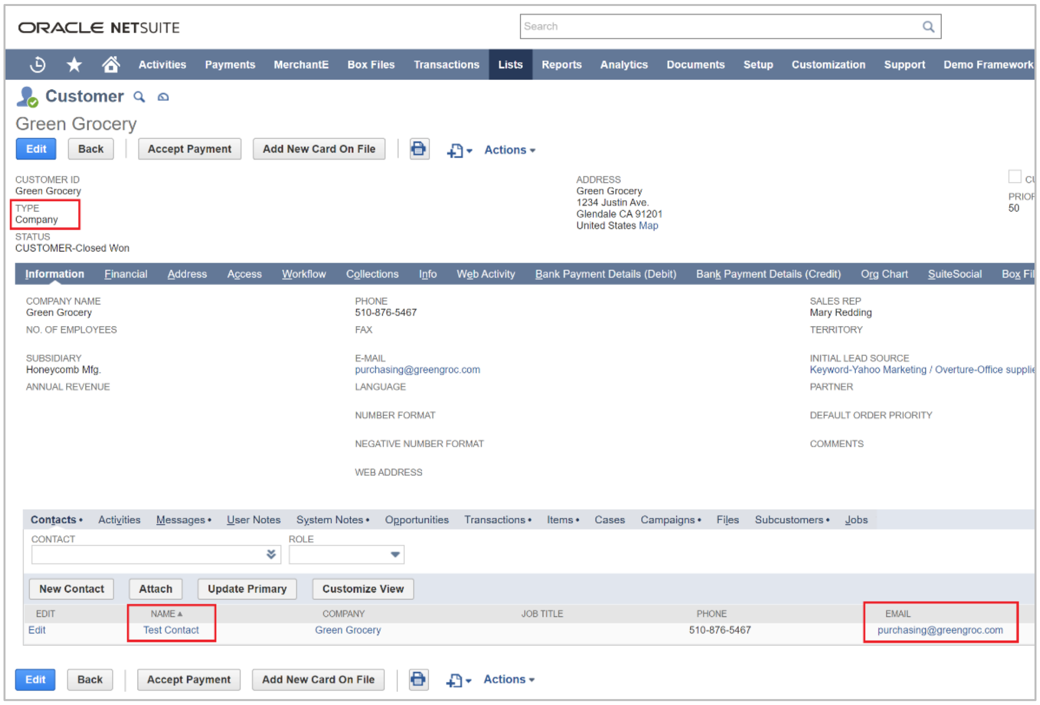

During the process of creating your invoice or quote make sure to select the following:

1. Select the form you customized with the Link to Pay in previous steps.
2. Select the Link to Pay Configuration.
3. Ensure a billing address is selected for the Invoice or Quote being created.

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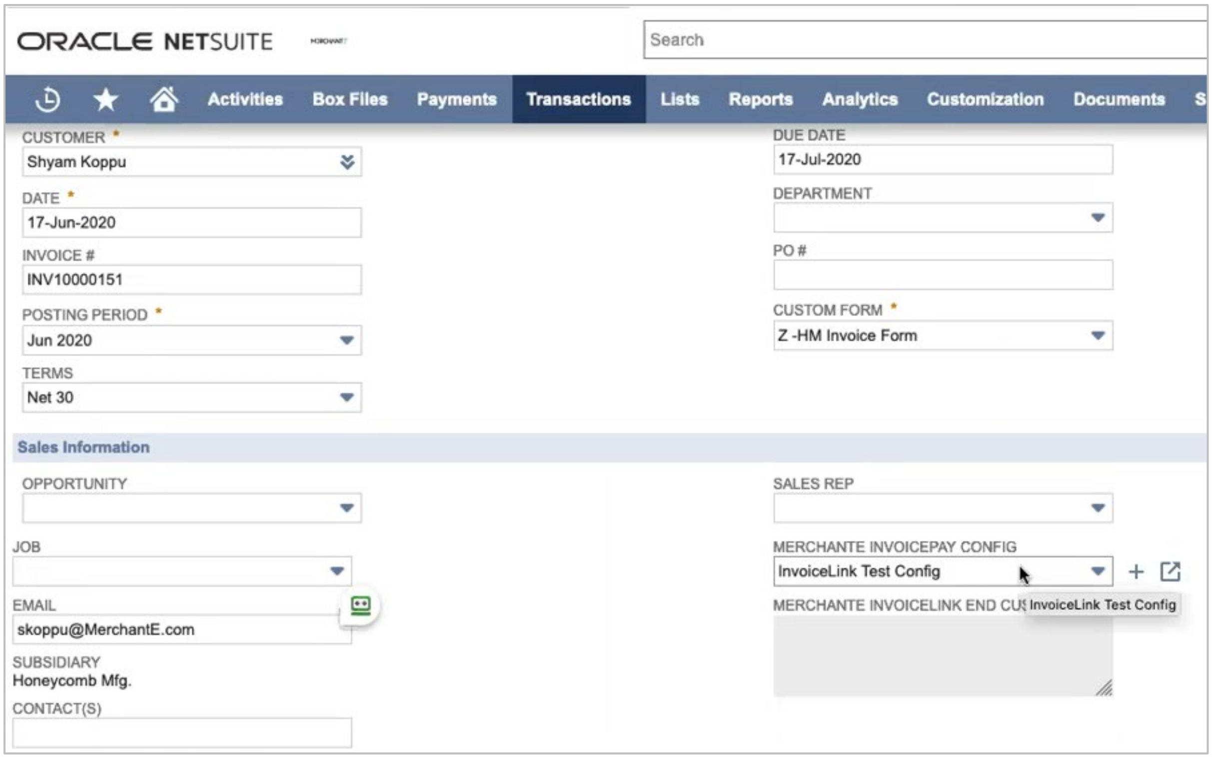


Creating a Customer Deposit

Customer deposits allow you to request an initial payment on a purchase prior to fulfillment to ensure your costs are covered before delivering goods to a customer.

- Ensure your customer is setup properly. Make sure the customer does not have a card on file set as the default payment method. If card on file is set as the default payment method, that card will automatically be charged rather than allowing your customer to initiate the payment as intended.

- Create a quote with the customer conversion logic set to Sales Order - Customer Deposit.

- Select the Link to Pay configuration.

- Confirm that the email is set up to be sent.

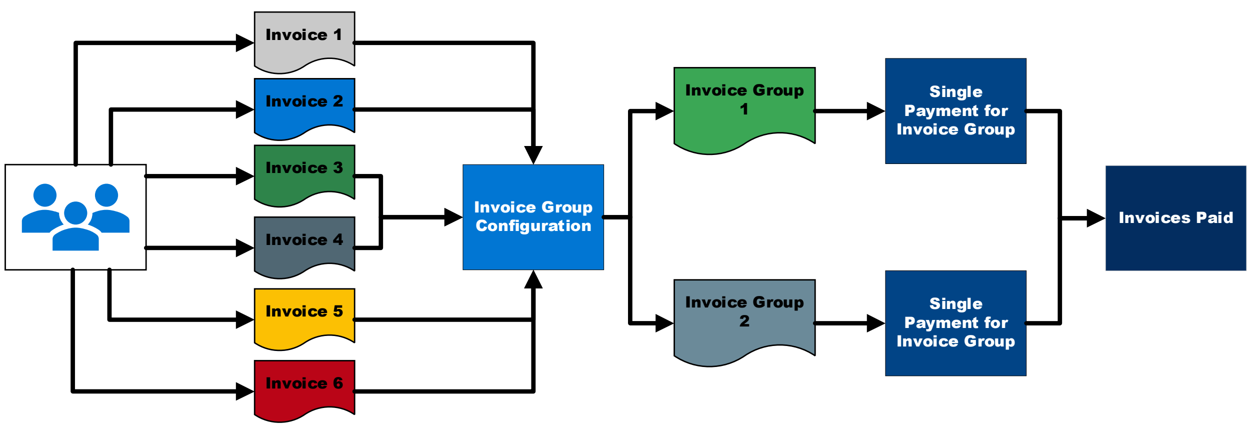
Note: Customer Deposits are normally posted in NetSuite within 15 minutes of customer payment.

Once the customer deposit is processed, a sales order is created automatically and ready to be fulfilled. Once fulfilled the customer deposit will be applied to the invoice associated with this order. If there is a remaining balance, that amount may be collected by sending the invoice with Link to Pay to the customer.

*Invoice Groups

You can use Invoice Groups in NetSuite with your MerchantE implementation. This provides you with additional flexibility to meet customer expectations for how and when they will receive invoices by combining multiple invoices into a single group. With grouped invoices, you can:

- Pay a specific group of invoices with a single payment using credit card, cash, or automated clearing house.
- Pay grouped invoices on a predefined schedule.
- Make full or partial payments of grouped invoices.
- Process refunds, credits, voids, chargebacks, and reconciliations using the normal workflow.
- View detailed line-item information for the grouped invoice.



To do this, you will need to enable and configure Invoice Groups in NetSuite and submit the invoice group to MerchantE. This guide provides step-by-step instructions for using Invoice Groups.
For more information, see NetSuite Invoice Groups Overview.

Invoice Group Setup

Enabling Invoice Groups

Invoice Groups must be enabled for in your NetSuite account globally and for individual customers in order to create Invoice Groups and add invoices to the group.

Enable Invoice Groups for the Account

Navigate: NetSuite → Setup → Company → Enable Features → Transactions → Invoice Group

1. From the NetSuite start page, open **Enable Features** in the **Company** submenu of the **Setup** dropdown menu.

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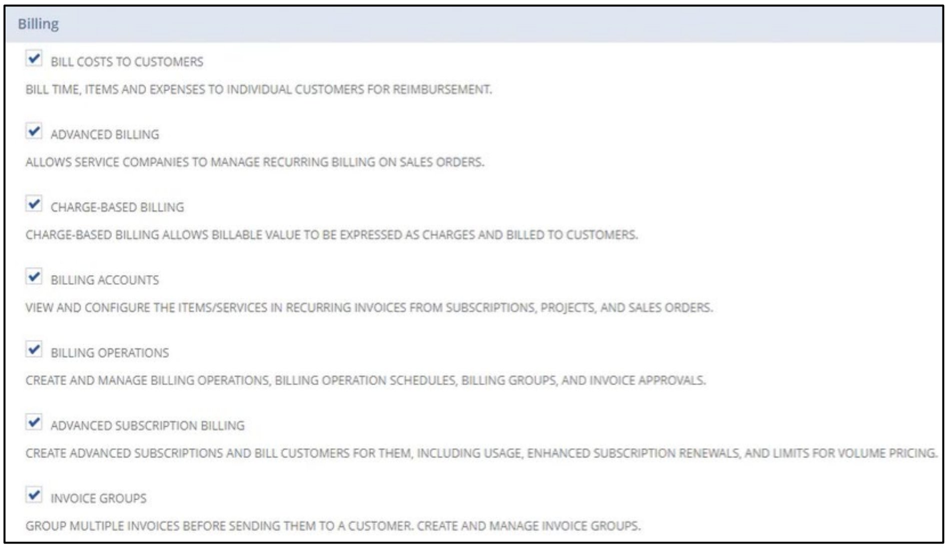
2. Open the **Transactions** tab.

3. Enable **Invoice Group** and click **Save**. **Group Invoices** is now available for your customer accounts in NetSuite.

> **Caution: It is difficult to disable Invoice Groups after they have been enabled. Invoice Groups cannot be disabled if invoice group records are present. This includes any records generated for invoice groups.**



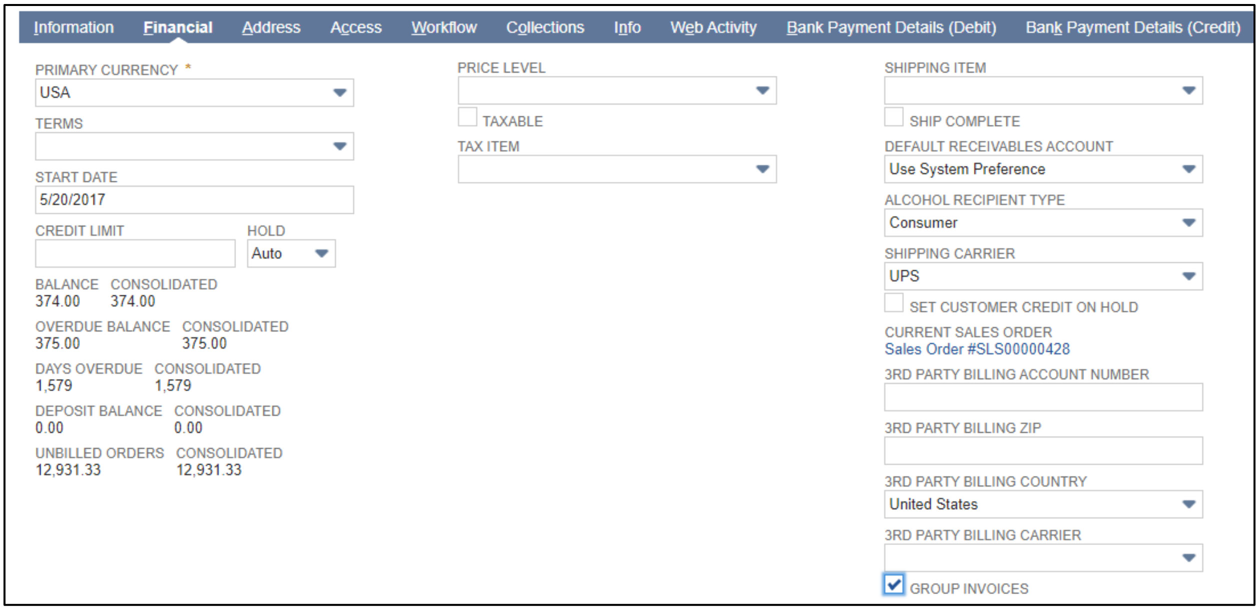
Enable Group Invoices for Customer

Navigate: NetSuite → Lists → Relationships → Customers → Financial → Group Invoices

1. From the **Lists** dropdown menu, select **Customers** within the **Relationships** submenu.

2. Select the customer by clicking the Edit link.

3. In the **Financial tab**, check the **Group Invoices** box and click **Save**. The customer is now available to have their invoices added to Invoice Groups.



To further customize Invoice Groups, see:

- Using Billing Operations to Generate and Group Invoices
- Customizing the Invoice Group Form
- Setting a Subsidiary for an Invoice Group
- Using SuiteFlow to Create an Invoice Groups Workflow

Create Invoice Groups

Add Invoices to Invoice Groups

Navigate: NetSuite → Transactions → Sales → Create Invoices → For Invoice Grouping

1. Select **Create Invoices** from the **Sales** submenu of the **Transactions** dropdown menu.

2. When creating an invoice, enabling **For Invoice Group** will add the invoice to the list of invoices available for grouping.

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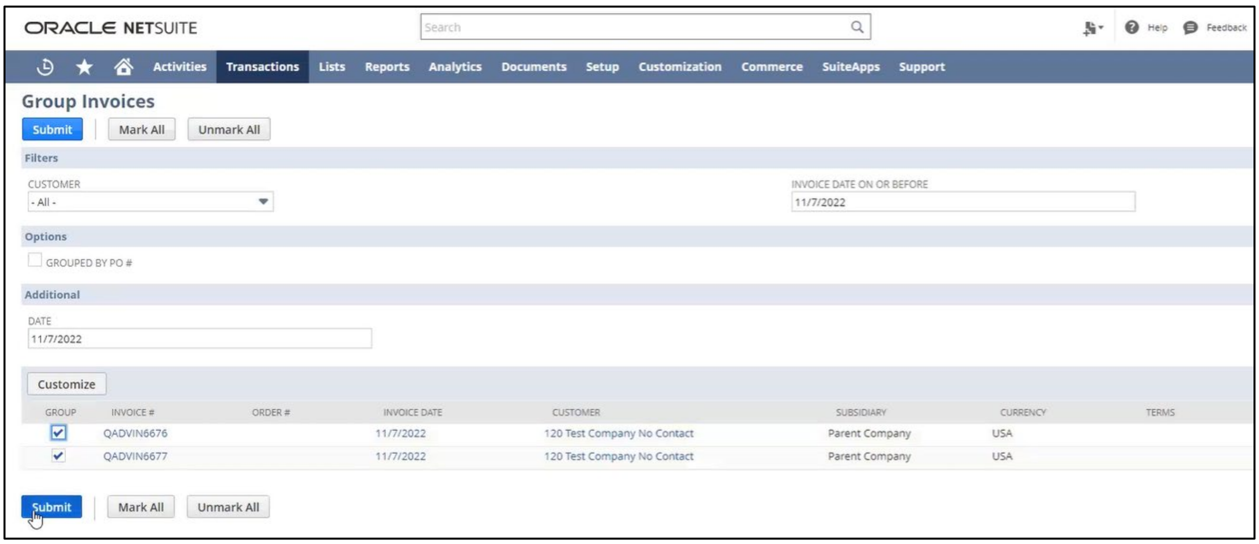
Note: When For Invoice Group is enabled for a customer, the customer Link to Pay details will not be displayed. The invoice can no longer be sent for payment individually.

Navigate: NetSuite → Transactions → Sales → Group Invoices → Select Invoices → Submit

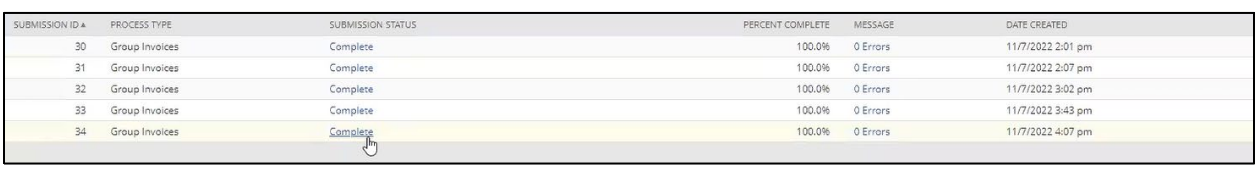
3. Select **Group Invoices** from the **Sales** submenu of the **Transactions** dropdown menu.

4. Select the invoices to be grouped and click **Submit**. The **Process Status** screen appears. The invoice group has been created when the **Submission Status** column is marked Complete.

Note: The maximum size for an Invoice Group is 100 invoices.



5. Click the Complete link. The Processed Records screen appears. Invoice Group names are generated automatically or configured manually. For more information, see [Numbering Invoice Groups](#).



SUBMISSION ID ▲	PROCESS TYPE	SUBMISSION STATUS	PERCENT COMPLETE	MESSAGE	DATE CREATED
30	Group Invoices	Complete	100.0%	0 Errors	11/7/2022 2:01 pm
31	Group Invoices	Complete	100.0%	0 Errors	11/7/2022 2:07 pm
32	Group Invoices	Complete	100.0%	0 Errors	11/7/2022 3:02 pm
33	Group Invoices	Complete	100.0%	0 Errors	11/7/2022 3:43 pm
34	Group Invoices	Complete	100.0%	0 Errors	11/7/2022 4:07 pm

6. Click the Invoice Group link in the **Result Record** column to view the invoice group record.

Removing an Invoice from an Invoice Group

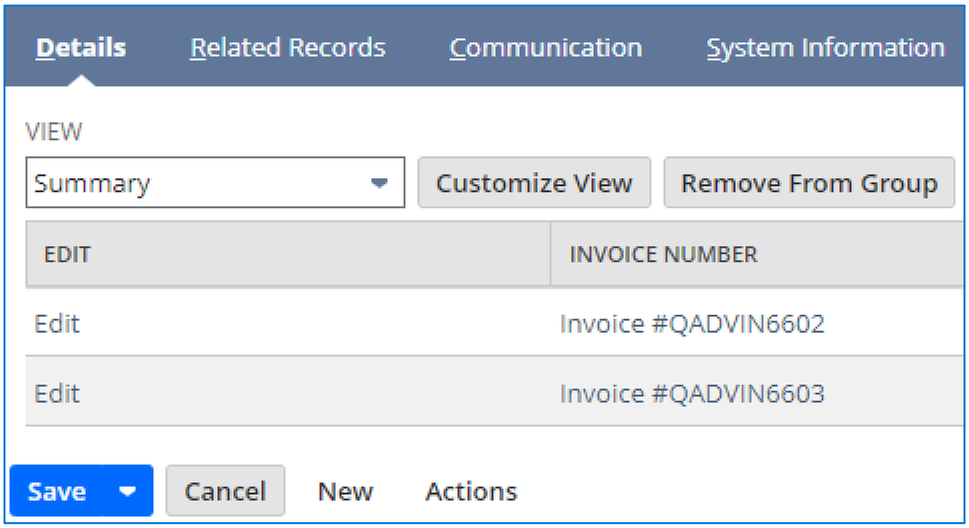
Navigate: NetSuite → Transactions → Sales → Group Invoices → List → Invoice Group

Note: If a payment has been fully or partially applied to the Invoice Group, you must first remove the payment. For more information see Reversing or Deleting Customer Payments.

1. Display the **Invoice Groups** list by clicking **List** in the **Group Invoices** submenu.

2. Select the Invoice Group by clicking the View or Edit link.

3. Click **Remove From Group**.



4. From the **Remove Invoices From Group** screen, check the box for the invoices to be removed.

5. Click **Remove From Group**.

Deleting an Invoice Group

Navigate: NetSuite → Transactions → Sales → Group Invoices → List

1. Display the **Invoice Groups** list by clicking **List** in the **Group Invoices** submenu.

2. Select the Invoice Group by clicking the View or Edit link.

3. From the **Actions** dropdown menu, click **Delete**.

Note: To delete an Invoice Group, you must first remove all invoices from the group. Then you can delete the Invoice.

Submit Invoice Group to MerchantE

Navigate: NetSuite → Transactions → Sales → Group Invoices → Select Invoices → Submit

Allow 15 minutes for processing or click **Manually Send to MerchantE Link to Pay**.

Note: 15 minutes is the shortest interval available for scheduled scrips.

Payment Page

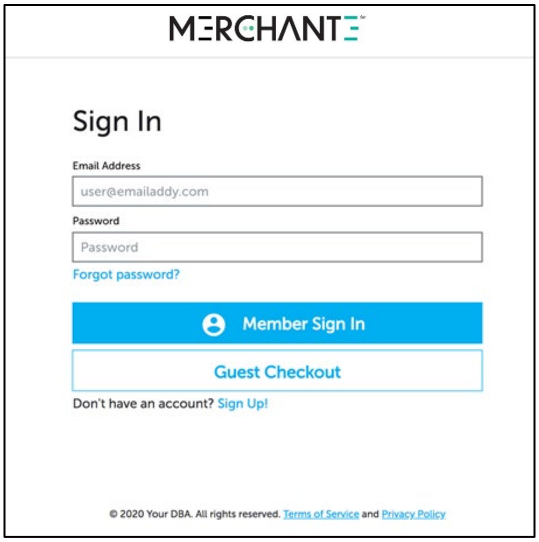
Hosted Payments will guide your customers through the checkout process to ensure their experience is as simple as possible. When your customers are directed to your payment page, they will have the option to:

- Checkout as a guest.
- Create a payment account.
- Sign in to a previously saved account.

This experience has been designed to be mobile responsive to accommodate a wide variety of devices that a user could potentially be using for checkout.

The checkout experience between guest checkout and account holder checkout is slightly different. Customers that "Checkout as Guest" have a limited view of Hosted Payments. They will not have the ability to store the card for future use, a feature only available for account holders. Additionally, an account holder gains access to the **Customer Dashboard**, which allows them to manage aspects of their account.

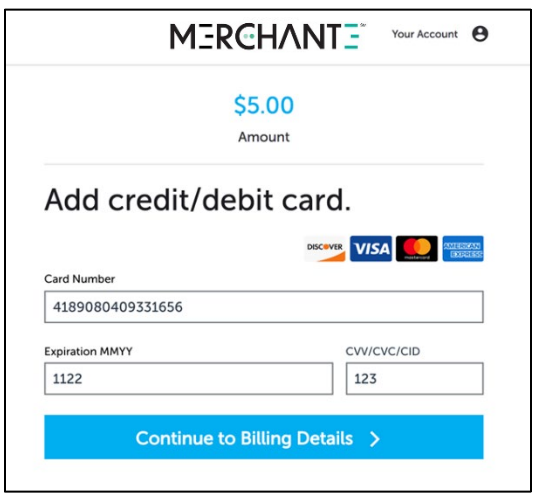
From the login page of the **Payment Page**, customers can sign in, check out as a guest, or create an account.



Guest Checkout

When customers choose to check out as a guest, they will not be able to store their card for future payments.

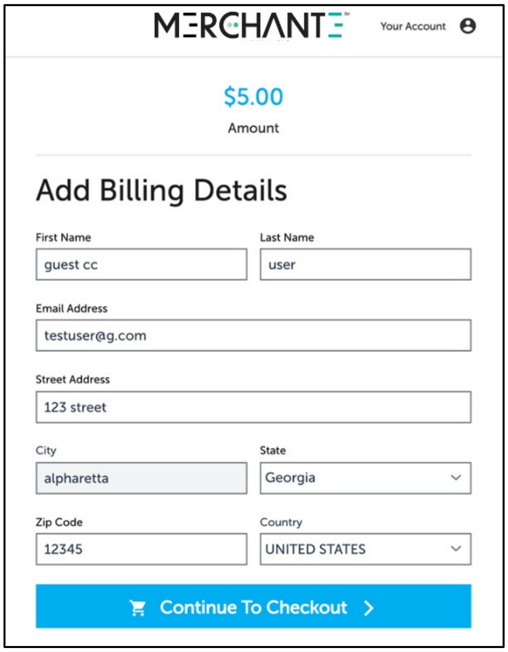
1. The customer clicks **Guest Checkout** from the Hosted Payments login page. The following page is displayed.



2. The customer types the following payment information:

- Amount of the payment
- Card Number
- Expiration date in MMYY format
- CVV/CVC/CID for the card.

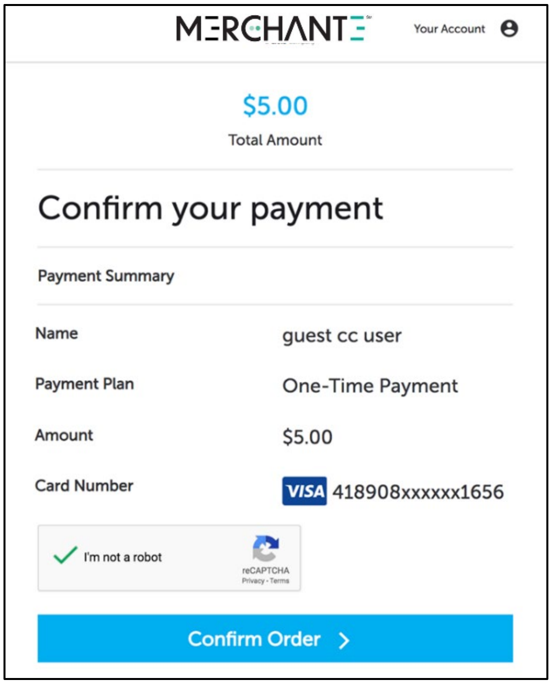
Customer then clicks **Continue to Billing Details** and the **Add Billing Details** screen is displayed.



3. The customer provides the following **billing details**:

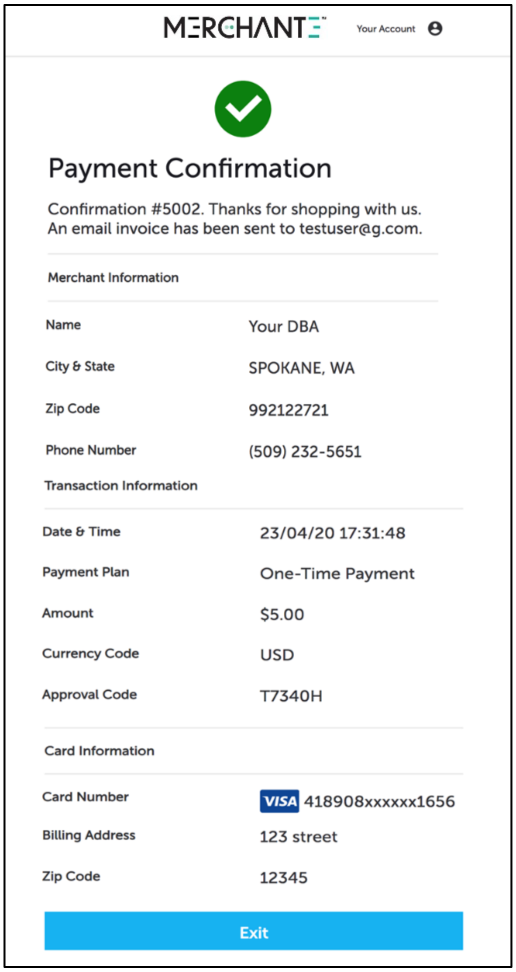
- First and Last Name
- Email address
- Street address
- City, State, ZIP code, and Country

Customer then clicks **Continue to Checkout** and the **Confirm your payment** screen is displayed.



4. The customer is able review the **Payment Summary** before submitting the payment. The customer must successfully complete the reCAPTCHA challenge before the can click **Confirm Order**.

They will then see the **Payment Confirmation** page:

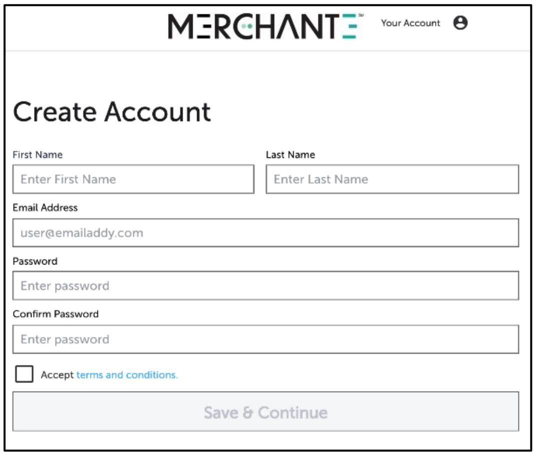


5. Customer can review the confirmation that the payment has been successfully submitted. This screen specifies where the email invoice has been sent. Customers can click **Exit** once they are done reviewing this page.

Creating an Account

Customers that create an account can sign in to complete subsequent payments more quickly and conveniently using stored payment information.

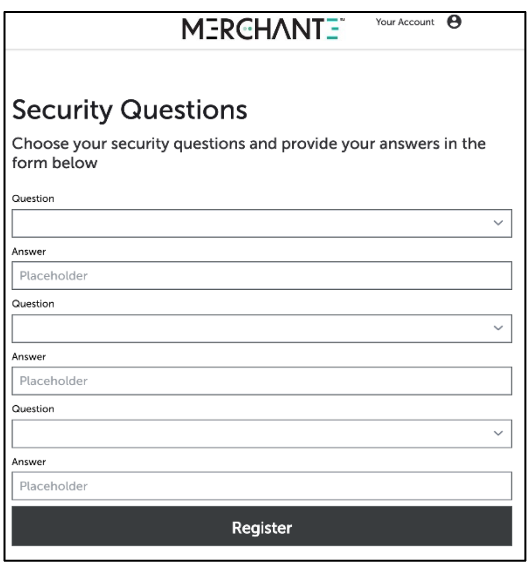
1. From the Sign In page, the customer clicks Sign Up! The **Create Account** screen is displayed.



2. On the **Create Account** screen, the customer must input the following information:

   - First and Last Name.
   - Email address.
   - Password.
   - Confirm their Password.
   - Click the check box to Accept terms and conditions.
   - Click the Save & Continue button.

3. The **Security Questions** screen is displayed.



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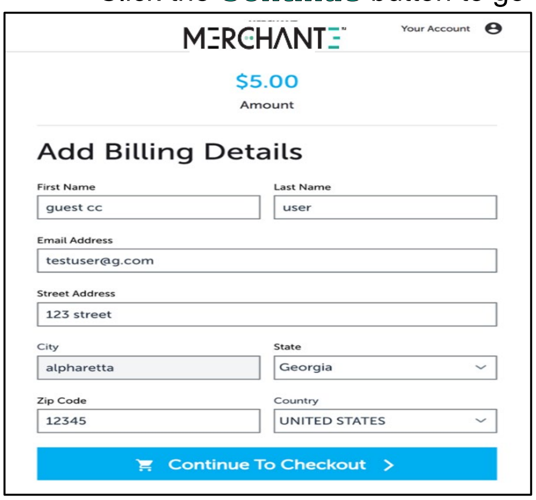
4. The customer selects three **security questions** and provides the **answers** for future use in case they forget their password. They must select three different security questions. After selecting the questions, the customer clicks **Register** and the confirmation screen is displayed:

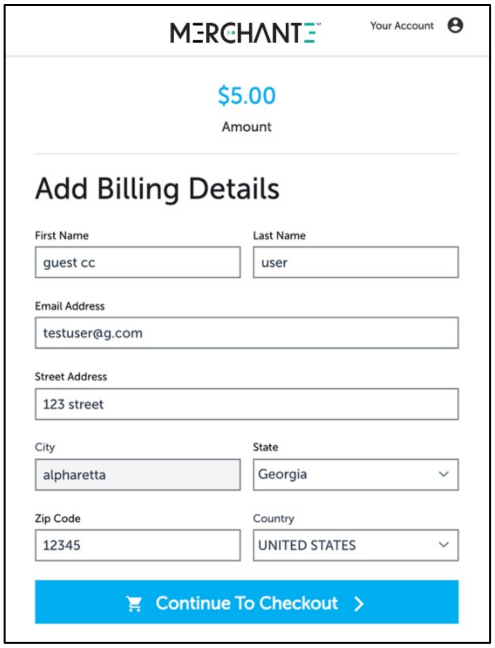
5. A confirmation email will be sent to the email address that the customer used for registration. The customer has two options:

   - Click the unique link within the confirmation email to verify their account.
   - Click the **Continue** button to go the payment information screens.



6. If the customer opts to continue with submitting their payment, they input the amount to be paid and selects **New Credit/Debit Card** since there would not yet be a card on file. The customer clicks **Continue** and the following **Add Billing Details** screen is displayed.

   Customer clicks **Continue to Billing Details** and the Add Billing Details screen is displayed.



7. Customer provides the following billing details:

   - First and Last Name
   - Email address
   - Streets address
   - City, State, ZIP code, and Country

   Customer clicks **Continue to Checkout** and the **Confirm your payment** screen is displayed.

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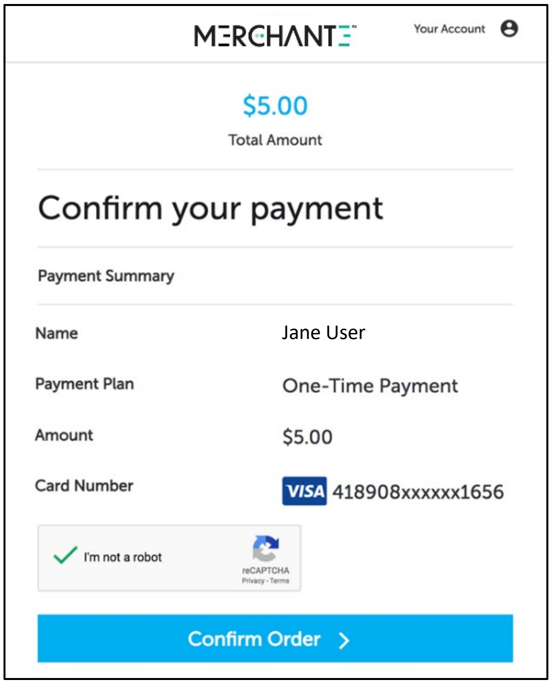

8. Customer can review the **Payment Summary** before submitting the payment. reCAPTCHA challenge must be successfully completed before they can click **Confirm Order**.

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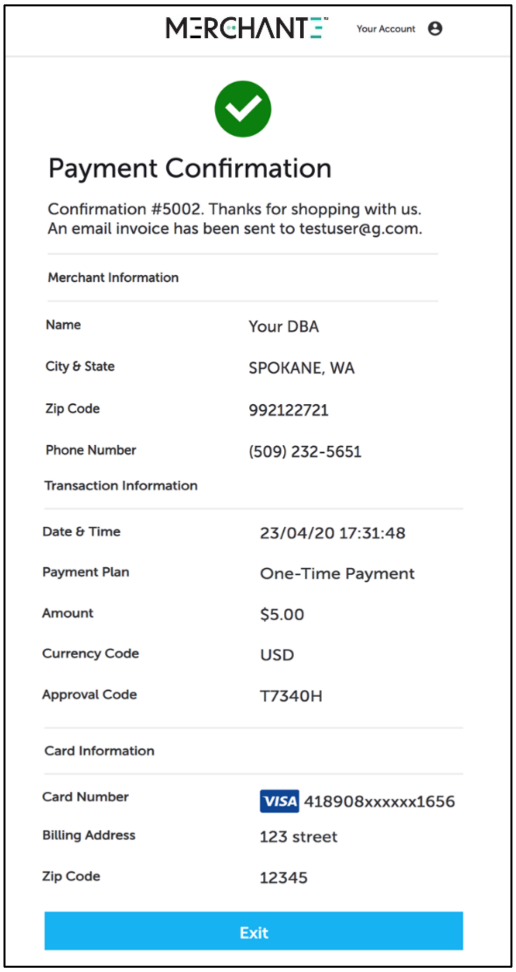
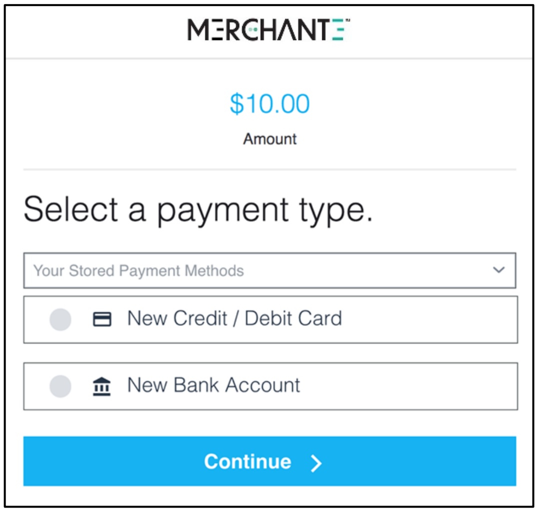
They will then see the **Payment Confirmation** screen:



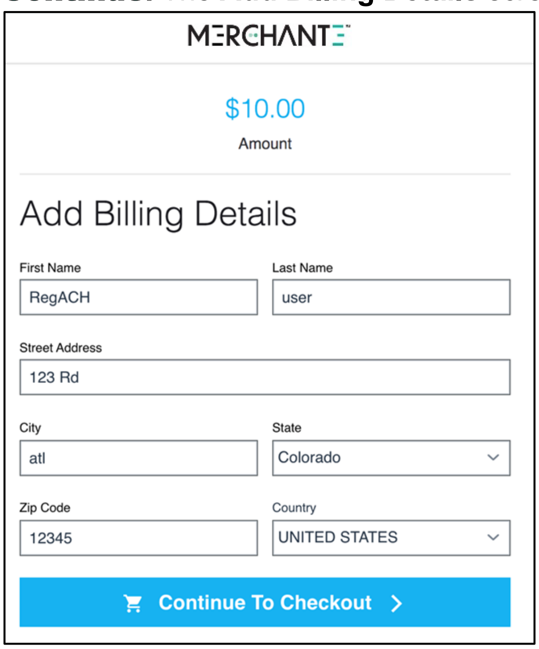
9. The customer can review the confirmation that the payment has been successfully submitted. This screen specifies where the email invoice has been sent. Customers can click **Exit** once they are done reviewing this page.

Account Holder Adding an ACH Account

1. On the Sign In page, the customer types their **Email Address** and **Password,** then clicks **Member Sign In**. The **Select a payment type** page is displayed.



2. Customer types the amount to be paid, selects **New Bank Account** and clicks **Continue**. The **Add Billing Details** screen is displayed.

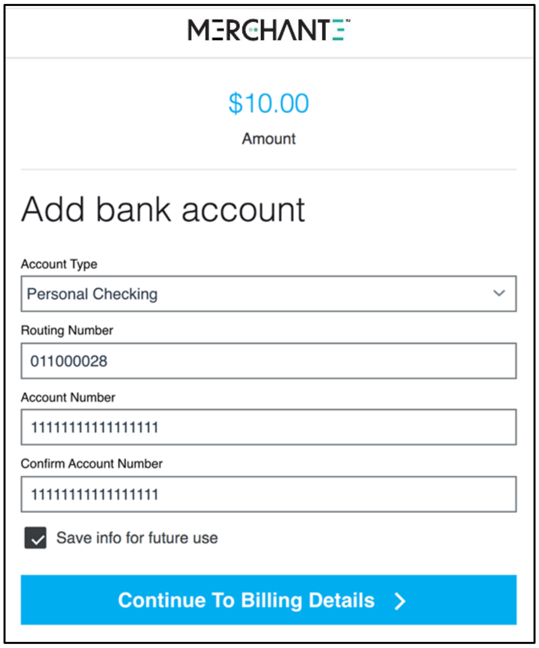


3. Customer provides the following information:

   - First and Last Name
   - Street Address

- City, State, ZIP code, and Country

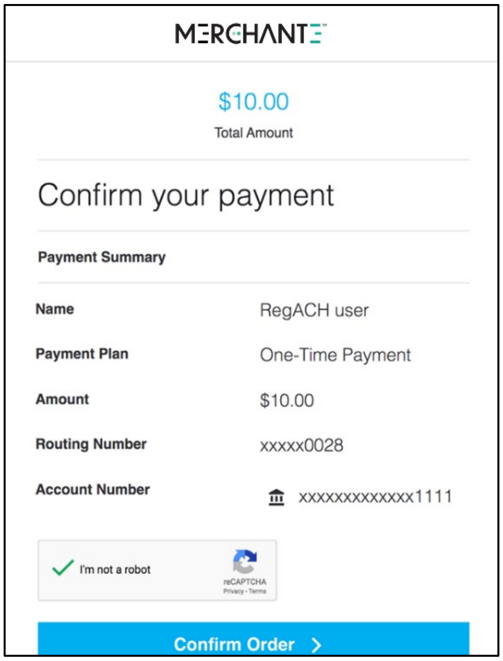
4. The customer then clicks **Continue to Checkout** and the **Add bank account** screen is displayed.



5. The customer:

   - Selects the **Account Type** from the dropdown list.
   - Types the Routing Number.
   - Types the Account Number.
   - Confirms the Account Number by typing it again.
   - Clicks **Save info for future use** if they wish to save their ACH information to their account.

6. The customer then clicks **Continue to Billing Details** and **Confirm your payment** screen is displayed.



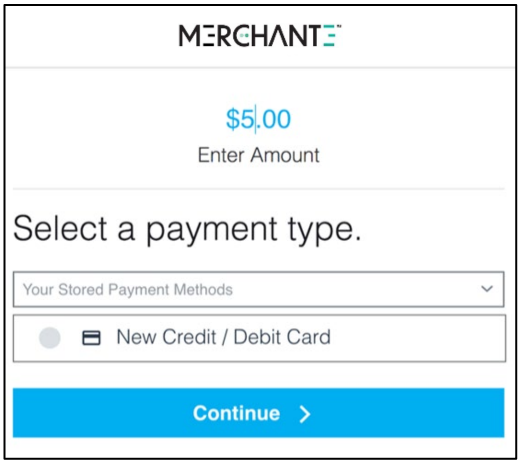
5. The customer is able review the **Payment Summary** before submitting the payment. The reCAPTCHA challenge must successfully be completed they can click **Confirm Order** and the **Payment Confirmation** page is displayed.

6. Customer can review the confirmation that the payment has been successfully submitted. This screen specifies where the email invoice has been sent. Customers can click **Exit** once they are done reviewing this page.

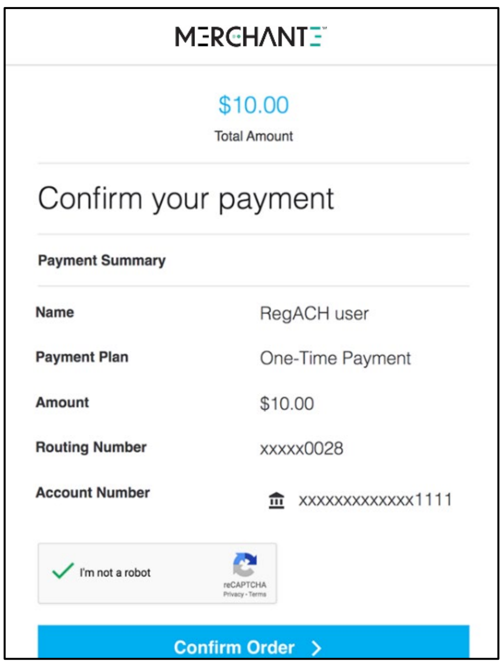
Account Holder Checkout

Subsequent visits to the Hosted Payment page allow Account Holders to quickly submit payments.

1. On the Sign In page, the customer types their **Email Address** and **Password**. The customer clicks **Member Sign In** and the **Select a payment type** page is displayed.

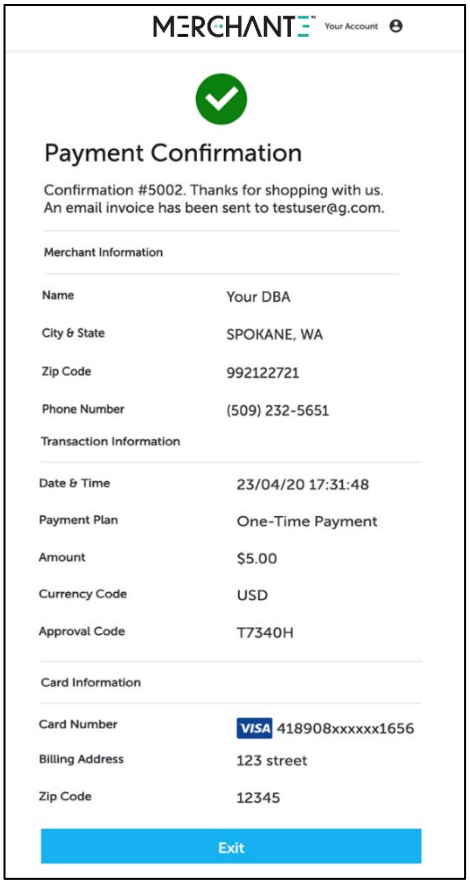


2. Customer types the amount they wish to pay and selects their desired payment method from the dropdown list. The customer clicks **Continue** and the **Confirm your payment** screen is displayed.



3. Customer can review the **Payment Summary** before submitting the payment. They must successfully complete the reCAPTCHA challenge before they can click **Confirm Order**. The **Payment Confirmation** screen is displayed.

4. The customer can review the confirmation that the payment has been successfully submitted. This screen specifies where the email invoice has been sent. Customers can click **Exit** once they are done reviewing this page.



Customer Dashboard

The **Customer Dashboard** is the consumer section of the Hosted Payment page. It allows your customers to view their payment history, manage their stored payment options, and more.

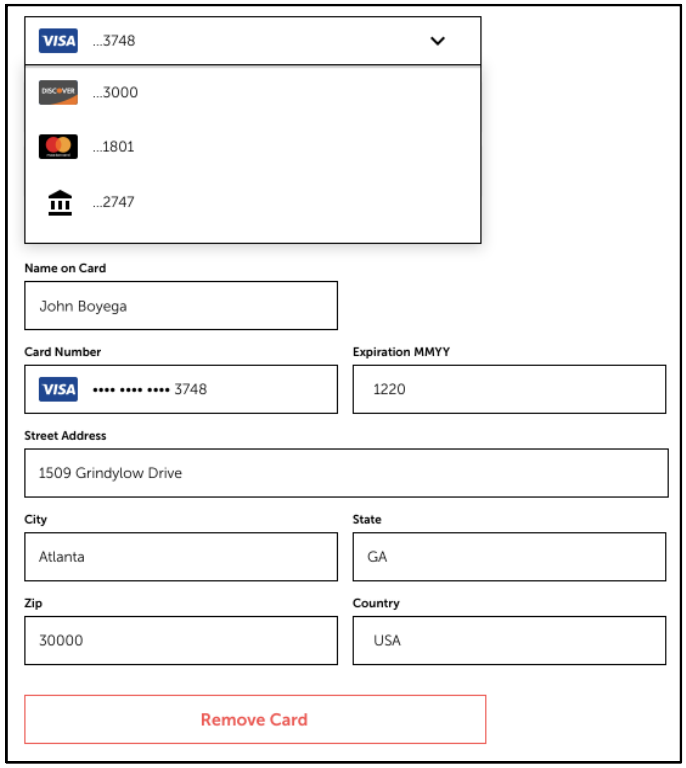
Stored Payments

The **Stored Payments** tab enables your customers to manage their stored payment options. Your customers will have the ability to view their existing stored payment options, delete their existing stored payment options, or new payment options to their account.

Existing Stored Payment Option

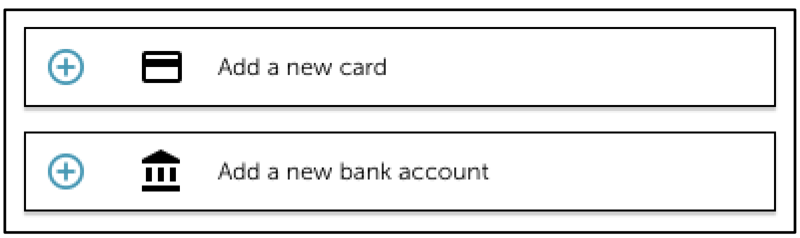
A customer can select an existing stored payment option by selecting an option from the dropdown menu.
When an item is selected from the dropdown list, the page will display the payment details and give the customer the option to remove the card.

If the customer clicks the **Remove Card** button, a warning message will appear. When they click to confirm, the stored card will be permanently removed from their account.



Add New Stored Payment Options

A user can add a new stored payment method in the customer dashboard. When the user clicks **Add a New Card** or **Add a New Bank Account** button, the page will display the necessary fields for the user to enter their payment information. When the user clicks **Save**, the card information will be validated. If the validation is successful, the payment information will be available to use whenever the customer signs in for checkout.



Example of the Card and Bank Information Fields:

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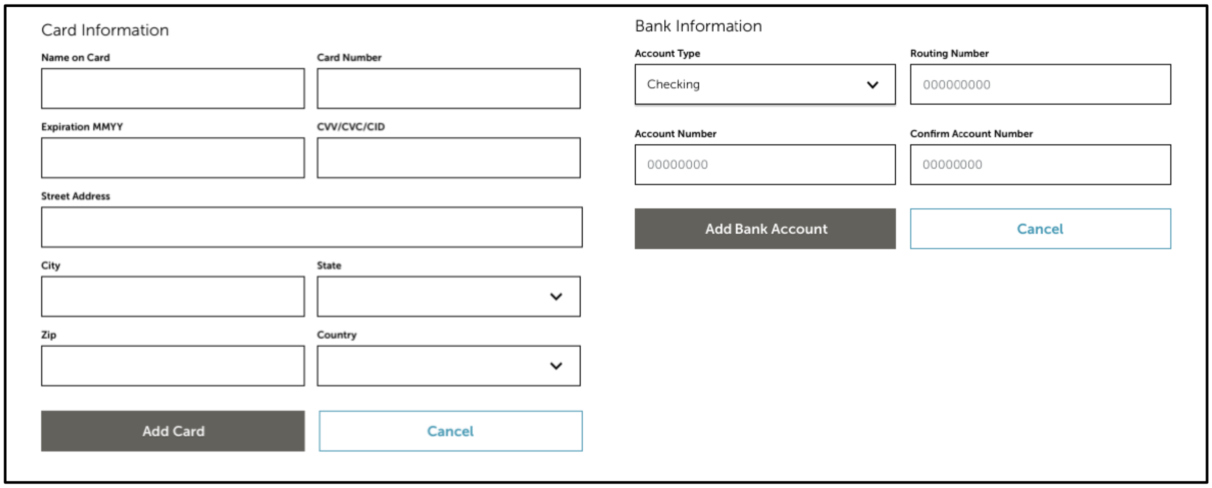
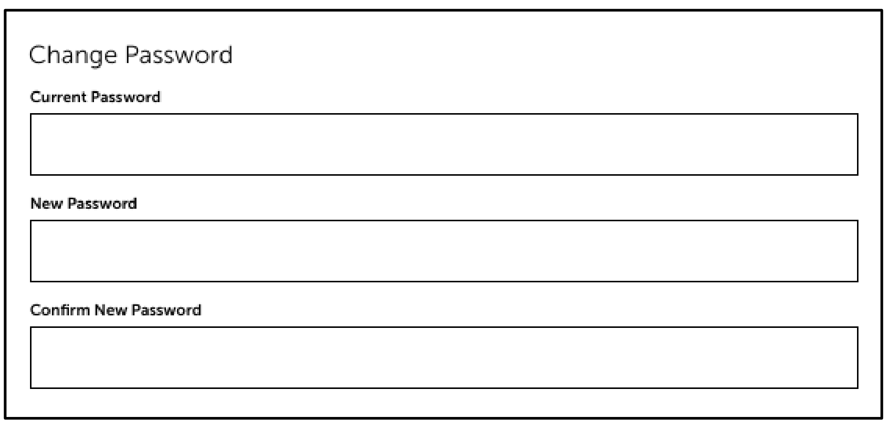


Profile

The **Profile** tab will allow your customer to modify their account settings. They can change their password and update security questions.

Change the password

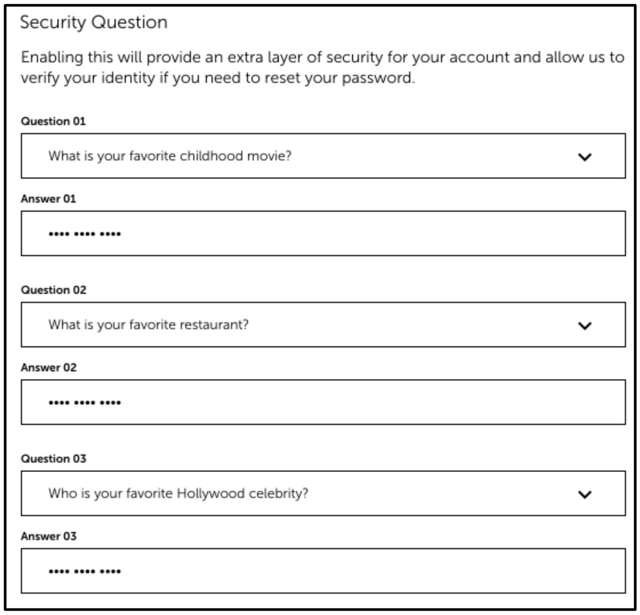
To change the password, the customer needs to enter their current password, new password, and re-enter their new password.



Note: The password must have a minimum of 7 characters and at least 1 number. When the information is entered, click the save changes button at the bottom of the screen.

Update Security Questions

To change the security questions or the answers to a security question, the customer can scroll down to the security question section of the **Profile** tab.



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