



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.





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* - Included in SuiteEssentials



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MERCHANT E

Key Contacts



| Information/Assistance | Contact Info |
|---|--|
| <p>After you have set up SuitePayments, if you have questions about payments, authorization, declines, settlement and chargebacks, contact MerchantE Customer Care.</p> | <p>help@MerchantE.com</p> |
| <p>If you have questions during set-up of MerchantE for SuitePayments, or learning how to use it, contact your MerchantE sales representative.</p> | <p>Your MerchantE Sales Representative</p> |
| <p>Questions about how to setup and use any of the MerchantE services.</p> | <p>MerchantE User Guide Library</p> |
| <p>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.</p> | <p>Your MerchantE Sales Representative or NetSuite@MerchantE.com</p> |

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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.



| Transaction ID | Start Date | End Date | Card/Account Number | Email Address | | | |
|----------------|------------|----------|---------------------|-----------------|--------|-------|--|
| 12345678910 | 03/14/19 | 03/14/20 | 12345678910 | harry@gmail.com | Search | Clear | |

| Customer Name | Email | Transaction ID | Payment Method | Date | Result | Amount | Actions |
|----------------|------------------------|----------------|----------------|------------|----------|----------|---------|
| Bradley Cooper | brad.cooper@gmail.com | 45-3932820 | ...4405 | 11/21/2019 | Approved | \$356.89 | ... |
| Doug Funny | dougunny@gmail.com | 43-2029481 | ...3020 | 12/03/2019 | Approved | \$356.89 | ... |
| Tommy Pickles | tompickles@gmail.com | 34-5948290 | ...7309 | 12/05/2019 | Approved | \$356.89 | ... |
| Chucky Finster | chuckfinster@gmail.com | 25-3948757 | ...3748 | 12/05/2019 | Approved | \$356.89 | ... |

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.

Hosted Payments Page

Transaction History **HPP Customization** Settings & Configuration

Background Color

#00aeeef45

Company Logo

Upload Files...

Accepted formats include PNG or JPG. 265KB maximum size

Footer

Preview

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Terms of Service

https://your-website.com/link-to-your-terms-and-conditions.html

Provide a link to your terms of service.

Privacy Policy

https://your-website.com/link-to-your-privacy-policy.html

Provide a link to your privacy policy.

Theme Color

#00AEEF

Publish Changes

* - Included in SuiteEssentials

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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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| Transaction History | | HPP Customization | | Settings & Configuration | | | |
|---------------------|-----------------------|-------------------|---------------------|--------------------------|----------|----------|---------|
| Transaction History | | | | | | | |
| Transaction ID | Start Date | End Date | Card/Account Number | Email Address | | | |
| 12345678910 | 03/14/19 | 03/14/20 | 12345678910 | harry@gmail.com | Search | | Clear |
| Customer Name | Email | Transaction ID | Payment Method | Date | Result | Amount | Actions |
| Bradley Cooper | brad.cooper@gmail.com | 45-3932820 | ...4405 | 11/21/2019 | Approved | \$356.89 | ... |
| Doug Funny | dougunny@gmail.com | 43-2029481 | ...3020 | 12/03/2019 | Approved | \$356.89 | ... |
| Tommy Pickles | tompickles@gmail.com | 34-5948290 | ...7309 | 12/05/2019 | Approved | \$356.89 | ... |

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

ORACLE NETSUITE

Search

Activities Payments MerchantE Box Files Transactions Lists Reports Analytics

Search & Install Bundles

Search

Basic | Advanced

LEAVE THE KEYWORDS BOX BLANK AND CLICK SEARCH TO VIEW THE MOST POPULAR SUITEAPPS

KEYWORDS
merchante

Installation Terms of Service

| NAME | BUNDLE ID | VERSION | MANAGED | COMPANY NAME |
|---------------------------------|-----------|---------|---------|--|
| MerchantE Payment Gateway API | 317221 | 1.3.0 | Yes | ME Deployment New (Trailing) - TSTDRV2219586 |
| MerchantE Card Swipe | 317222 | 3.2.1 | | ME Deployment New (Trailing) - TSTDRV2219586 |
| MerchantE Tokenization | 317223 | 0.38 | | ME Deployment New (Trailing) - TSTDRV2219586 |
| MerchantE Tokenization | 172471 | 0.38 | | ME Java Core Prod Support - TSTDRV1158766 |
| MerchantE Payment Gateway API | 185077 | 1.3.0 | | ME API Prod Support - TSTDRV1708168 |
| MerchantE Card Swipe | 83396 | 3.2.1 | | ME Java Core Prod Support - TSTDRV1158766 |
| Merchant e-Solutions Card Swipe | 178006 | 2.2 | | ME Java Core Test - TSTDRV1647121 |
| MerchantE Invoice Link [TEST] | 337007 | 0.0.1 | | ME API Prod Support - TSTDRV1708168 |
| Merchant e-Solutions Card Swipe | 180384 | 2.2 | | ME Java Core Demo - TSTDRV1157995 |

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:



| NAME | NO. INSTALLS |
|---|---|
| MerchantE Payment Gateway API | 1,034 |
| ID | PRODUCT |
| 317221 | NetSuite, NetSuite OneWorld |
| COPIED FROM | VERTICAL |
| 214394 | Agriculture, Computer Software, Computer Software Web-based, Construction & Contracting, Distribution & Wholesale, eCommerce, Education, Energy / Utilities, Finance & Insurance, Government, IT Developer / Reseller / VAR, Manufacturing, Nonprofit, Real Estate, Restaurant & Hospitality, Retail, Services : Accounting, Services : Advertising & Marketing Services, Services : Computer & IT Services, Services : Consulting, Services : Engineering, Architecture & Design, Services : Healthcare Services, Services : Legal, Services : Media/Publishing, Services : Other, Services : Personal Services, Services : Professional Services, Services : Telecommunications, Services : Transportation Services |
| VERSION | LANGUAGES |
| 1.3.0 | English (U.S.) |
| COMPANY | AVAILABILITY |
| ME Deployment New (Trailing) | Public |
| TSTDRV2219586 | ADMIN DOCUMENTATION |
| <input checked="" type="checkbox"/> MANAGED | |
| AVAILABLE SINCE | |
| 1/31/2020 | |

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

* - Included in SuiteEssentials

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The screenshot shows the Oracle NetSuite interface. The top navigation bar includes 'Setup', 'Customization', 'Support', 'Demo Framework', and 'Fixed'. The 'Setup' menu is open, showing options like 'Company', 'Accounting', 'Sales', 'Marketing', 'Support', 'Site Builder', 'Import/Export', 'Users/Roles', 'Integration', and 'MeS Tokenization'. The 'Accounting' option is selected, and the 'Accounting Lists' sub-menu is open, with 'New' highlighted. The Home dashboard on the left shows sections for 'Reminders', 'New Release', 'Top 5 Items By Qty Sold', 'Key Performance Indicators', and 'Shortcuts'.

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

The screenshot shows the 'Accounting Lists' page. The 'New' button is highlighted with a red box. The 'FILTERS' section has 'Type' set to 'Payment Method'. Below the filters is a table of accounting lists.

| INACTIVE | EDIT VIEW | INTERNAL ID | DESCRIPTION |
|-------------------------------------|-------------|-------------|----------------------|
| <input type="checkbox"/> | Edit View | 14 | ACH |
| <input checked="" type="checkbox"/> | Edit View | 9 | American Express |
| <input type="checkbox"/> | Edit View | 20 | American Express1 |
| <input type="checkbox"/> | Edit View | 15 | American Express-CoF |
| <input type="checkbox"/> | Edit View | 6 | AmericanExpress |
| <input checked="" type="checkbox"/> | Edit View | 1 | Cash |
| <input type="checkbox"/> | Edit View | 2 | Check |
| <input type="checkbox"/> | Edit View | 3 | Discover |

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.



Payment Method

Save Cancel Reset

NAME *
Invoice Link

TYPE
External Checkout

REQUIRES LINE-LEVEL DATA

ASSOCIATED PAYMENT PROCESSING PROFILES
 ACH Test
 Hina Mes NS API Plg
 InvoiceLink Test
ME Integr InvLink 2
 MeS ACH Arjune
 MeS ACH Arjune2

COUNTRIES
 <Type & tab for single value>

INACTIVE
 DISPLAY IN WEB SITE

Account Payment Visuals

GROUP WITH UNDEPOSITED FUNDS
 DEPOSIT TO ACCOUNT

Save Cancel Reset

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**.

MerchantE Link to Pay Config List List Search Audit Trail

VIEW Default Customize View **New MerchantE Link to Pay Config**

+ FILTERS

SHOW INACTIVES QUICK SORT TOTAL: 5

| EDIT VIEW | INTERNAL ID | NAME ▲ | ID | DATE CREATED | LAST MODIFIED | LINK TO PAY USER NAME | LINK TO PAY PASSWORD |
|-------------|-------------|-------------------------|----|-------------------|-------------------|-----------------------|---|
| Edit View | 3 | InvLink Production Cert | 3 | 1/12/2021 2:24 pm | 11/5/2022 1:23 pm | ns_ProdTestuser | U2FsdGVkX19OsBFGIPI+mkdALNjHVMaTVnoAPh9pWU= |
| Edit View | 2 | ME Integration | 2 | 1/4/2021 12:11 pm | 11/5/2022 1:27 pm | ns_testuser | U2FsdGVkX19LVm6Ex0NX5043IRKOfg2IZloXncWuC4= |

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



MerchantE Link to Pay Config
List Search Customize More

Save
Cancel

| | | |
|--|---|--|
| <p>NAME * <input style="width: 95%;" type="text"/></p> <p><input type="checkbox"/> INACTIVE</p> <p>SUBSIDIARY * <input style="width: 95%;" type="text"/></p> <p>MERCHANT TAX ID <input style="width: 95%;" type="text"/></p> <p>NS PAY PROFILE ID * <input style="width: 95%;" type="text"/></p> | <p>MERCHANT PROFILE ID * <input style="width: 95%;" type="text"/></p> <p><input type="checkbox"/> IS DEFAULT</p> <p><input type="checkbox"/> TEST MODE</p> <p>PAYMENT METHOD * <input style="width: 95%;" type="text"/></p> <p>MERCHANT LINK TO PAY QUOTE CONVERSION LOGIC DEFAULT <input style="width: 95%;" type="text"/></p> | <p><input type="checkbox"/> ALLOW CUSTOM PAYMENT AMOUNT</p> <p><input type="checkbox"/> DO NOT AUTO-APPLY STATEMENT PAYMENT</p> <p>MERCHANT GENERAL TOKEN PAYMENT METHOD <input style="width: 95%;" type="text"/></p> <p>ME PAYMENT CARD TOKEN PAYMENT METHOD <input style="width: 95%;" type="text"/></p> |
|--|---|--|

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.

The screenshot shows the 'Enable Features' interface in NetSuite. At the top, there are 'Save', 'Cancel', and 'Reset' buttons. Below is a navigation bar with tabs for 'Company', 'Accounting', 'Tax', 'Transactions', 'Items & Inventory', 'Employees', 'CRM', 'Analytics', 'Web Presence', and 'SuiteCloud'. Under the 'SuiteCloud' tab, there is a link for 'VIEW SUITECLOUD TERMS OF SERVICE'. The main content area is divided into sections: 'SuiteBuilder' and 'SuiteScript'. Under 'SuiteBuilder', there are three checked checkboxes: 'ITEM OPTIONS' (with subtext 'ASSIGN CUSTOM TRANSACTION ITEM OPTION FIELDS TO THE LINE ITEMS OF YOUR TRANSACTION RECORDS.'), 'CUSTOM RECORDS' (with subtext 'COLLECT INFORMATION SPECIFIC TO YOUR BUSINESS THAT CAN BE INTEGRATED WITH STANDARD NETSUITE RECORDS.'), and 'ADVANCED PDF/HTML TEMPLATES' (with subtext 'ENABLE POWERFUL, TEMPLATE-BASED RENDERING OF SELECTED TRANSACTIONS.'). The 'ADVANCED PDF/HTML TEMPLATES' checkbox and its subtext are highlighted with a red rectangular box. Under 'SuiteScript', there is one checked checkbox: 'CLIENT SUITESCRIPT' (with subtext 'USE INDUSTRY-STANDARD JAVASCRIPT TO DO ADVANCED CLIENT-SIDE CUSTOMIZATION OF YOUR FORMS. BY ENABLING THIS FEATURE, YOU AGREE TO SUITECLOUD TERMS OF SERVICE.').

*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

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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.

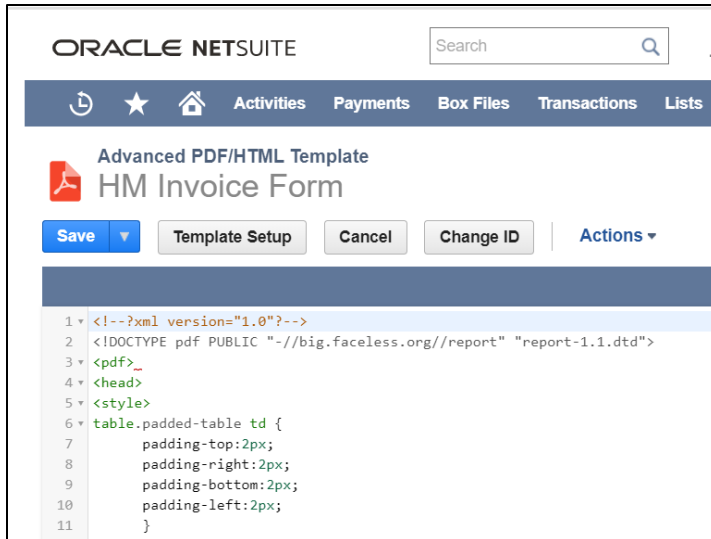
| EDIT | NAME | SCRIPT ID | TYPE | RECORD TYPE | PREFERRED |
|-----------|--|--------------------------------------|----------------------|--|-------------------------------------|
| Customize | Standard MES Card on File PDF/HTML Template | STDMPCLR_MES_CARD_ON_FILE | Custom Record | CUSTOMRECORD_MES_CARD_ON_FILE | <input type="checkbox"/> |
| Customize | Standard MES Card Type PDF/HTML Template | STDMPCLR_MES_CARD_TYPE | Custom Record | CUSTOMRECORD_MES_CARD_TYPE | <input type="checkbox"/> |
| Customize | Standard MES Potential Match PDF/HTML Template | STDMPCLR_MES_POTENTIAL_MATCH | Custom Record | CUSTOMRECORD_MES_POTENTIAL_MATCH | <input type="checkbox"/> |
| Customize | Standard MES AUS Batch Request Line PDF/HTML Template | STDMPCLR_MES_AUS_BATCH_REQUEST_LINE | Custom Record | CUSTOMRECORD_MES_AUS_BATCH_REQUEST_LINE | <input type="checkbox"/> |
| Customize | Standard MES Card Type Codes PDF/HTML Template | STDMPCLR_MES_CARD_TYPE_CODEES | Custom Record | CUSTOMRECORD_MES_CARD_TYPE_CODEES | <input type="checkbox"/> |
| Customize | Standard MES Tokenization Profile PDF/HTML Template | STDMPCLR_MES_TOKENIZATION_PROFILE | Custom Record | CUSTOMRECORD_MES_TOKENIZATION_PROFILE | <input type="checkbox"/> |
| Customize | Standard Merchant e-Solutions Configuration PDF/HTML Template | STDMPCLRMESCONFIG | Custom Record | CUSTOMRECORDMESCONFIG | <input type="checkbox"/> |
| Customize | Standard MES Java Core Profile Migration PDF/HTML Template | STDMPCLR_MES_JAVACORE_PROFILE_MIGRAT | Custom Record | CUSTOMRECORD_MES_JAVACORE_PROFILE_MIGRAT | <input type="checkbox"/> |
| Customize | Standard Direct Debit File Format Specific Types PDF/HTML Template | STDMPCLR_339_LDD_FORMAT_SPCFC_TYPES | Custom Record | CUSTOMRECORD_339_LDD_FORMAT_SPCFC_TYPES | <input type="checkbox"/> |
| Customize | Standard Allowed Country Formats By Edition PDF/HTML Template | STDMPCLR_10762_CNTRYFMTS_BY_EDITION | Custom Record | CUSTOMRECORD_10762_CNTRYFMTS_BY_EDITION | <input type="checkbox"/> |
| Customize | Standard Customer Deposit PDF/HTML Template | STDMPCLUSTDEP | Customer Deposit | | <input checked="" type="checkbox"/> |
| Customize | Standard Expense Report PDF/HTML Template | STDMPLEXPREPT | Expense Report | | <input type="checkbox"/> |
| Customize | Standard GL Impact PDF/HTML Template | STDMPGLIMPACT | GL Impact | | <input type="checkbox"/> |
| Full | HM Invoice Form | CUSTMPL_TSTDRV1157995_103 | Invoice | | <input checked="" type="checkbox"/> |
| Customize | Standard Invoice PDF/HTML Template | STDMPCLCSTRNVC | Invoice | | <input type="checkbox"/> |
| Customize | Standard Item Label PDF/HTML Template | STDMPFLITELABEL | Item Label | | <input type="checkbox"/> |
| Full | HG Quote Form | CUSTMPL_TSTDRV1157995_100 | Quote | | <input checked="" type="checkbox"/> |
| Full | HM Quote Form | CUSTMPL_TSTDRV1157995_105 | Quote | | <input checked="" type="checkbox"/> |
| Customize | Standard Quote PDF/HTML Template | STDMPCLQUOTE | Quote | | <input type="checkbox"/> |
| Customize | Standard Return Authorization PDF/HTML Template | STDMPRLRTHAUTH | Return Authorization | | <input type="checkbox"/> |
| Edit | Custom Sales Order PDF/HTML Template | CUSTMPL_TSTDRV1158765_111 | Sales Order | | <input type="checkbox"/> |
| Customize | Standard Sales Order PDF/HTML Template | STDMPCLSALESORD | Sales Order | | <input checked="" type="checkbox"/> |

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

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

```

<#if record.custbody_mes_inv1_end_customer_link?has_content>
    <a href="{record.custbody_mes_inv1_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](#)

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

Adding a Link to Pay QR Code

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

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

| EDIT | NAME | SCRIPT ID | TYPE | RECORD TYPE | PREFERRED |
|-----------|--|---------------------------------------|----------------------|--|-------------------------------------|
| Customize | Standard MeS Card on File PDF/HTML Template | STDTMFLCR_MES_CARD_ON_FILE | Custom Record | CUSTOMRECORD_MES_CARD_ON_FILE | <input type="checkbox"/> |
| Customize | Standard MeS Card Type PDF/HTML Template | STDTMFLCR_MES_CARD_TYPE | Custom Record | CUSTOMRECORD_MES_CARD_TYPE | <input type="checkbox"/> |
| Customize | Standard MeS Potential Match PDF/HTML Template | STDTMFLCR_MES_POTENTIAL_MATCH | Custom Record | CUSTOMRECORD_MES_POTENTIAL_MATCH | <input type="checkbox"/> |
| Customize | Standard MeS AUS Batch Request Line PDF/HTML Template | STDTMFLCR_MES_AUS_BATCH_REQUEST_LINE | Custom Record | CUSTOMRECORD_MES_AUS_BATCH_REQUEST_LINE | <input type="checkbox"/> |
| Customize | Standard MeS Card Type Codes PDF/HTML Template | STDTMFLCR_MES_CARD_TYPE_CODEES | Custom Record | CUSTOMRECORD_MES_CARD_TYPE_CODEES | <input type="checkbox"/> |
| Customize | Standard MeS Tokenization Profile PDF/HTML Template | STDTMFLCR_MES_TOKENIZATION_PROFILE | Custom Record | CUSTOMRECORD_MES_TOKENIZATION_PROFILE | <input type="checkbox"/> |
| Customize | Standard Merchant e-Solutions Configuration PDF/HTML Template | STDTMFLCRMESCONFIG | Custom Record | CUSTOMRECORDMESCONFIG | <input type="checkbox"/> |
| Customize | Standard MeS Java Core Profile Migration PDF/HTML Template | STDTMFLCR_MES_JAVACORE_PROFILE_MIGRAT | Custom Record | CUSTOMRECORD_MES_JAVACORE_PROFILE_MIGRAT | <input type="checkbox"/> |
| Customize | Standard Direct Debit File Format Specific Types PDF/HTML Template | STDTMFLCR_1931_DD_FORMAT_SPECFC_TYPES | Custom Record | CUSTOMRECORD_1931_DD_FORMAT_SPECFC_TYPES | <input type="checkbox"/> |
| Customize | Standard Allowed Country Formats By Edition PDF/HTML Template | STDTMFLCR_19762_CNTRYFMNTS_BY_EDITION | Custom Record | CUSTOMRECORD_19762_CNTRYFMNTS_BY_EDITION | <input type="checkbox"/> |
| Customize | Standard Customer Deposit PDF/HTML Template | STDTMFLCUSIDEP | Customer Deposit | | <input checked="" type="checkbox"/> |
| Customize | Standard Expense Report PDF/HTML Template | STDTMFLCUSPREPT | Expense Report | | <input type="checkbox"/> |
| Customize | Standard GL Impact PDF/HTML Template | STDTMFLGLIMPACT | GL Impact | | <input type="checkbox"/> |
| Edit | HM Invoice Form | CUSTMPL_TSTDRV115799_103 | Invoice | | <input checked="" type="checkbox"/> |
| Customize | Standard Invoice PDF/HTML Template | STDTMFLCUSINVG | Invoice | | <input checked="" type="checkbox"/> |
| Customize | Standard Item Label PDF/HTML Template | STDTMFLITEMLABEL | Item Label | | <input type="checkbox"/> |
| Edit | HC Quote Form | CUSTMPL_TSTDRV115799_100 | Quote | | <input checked="" type="checkbox"/> |
| Edit | HM Quote Form | CUSTMPL_TSTDRV115799_105 | Quote | | <input checked="" type="checkbox"/> |
| Customize | Standard Quote PDF/HTML Template | STDTMFLGQUOTE | Quote | | <input checked="" type="checkbox"/> |
| Customize | Standard Return Authorization PDF/HTML Template | STDTMFLRTHAUTH | Return Authorization | | <input type="checkbox"/> |
| Edit | Custom Sales Order PDF/HTML Template | CUSTMPL_TSTDRV115876_111 | Sales Order | | <input type="checkbox"/> |
| Customize | Standard Sales Order PDF/HTML Template | STDTMFLKALEOSDR | Sales Order | | <input checked="" type="checkbox"/> |

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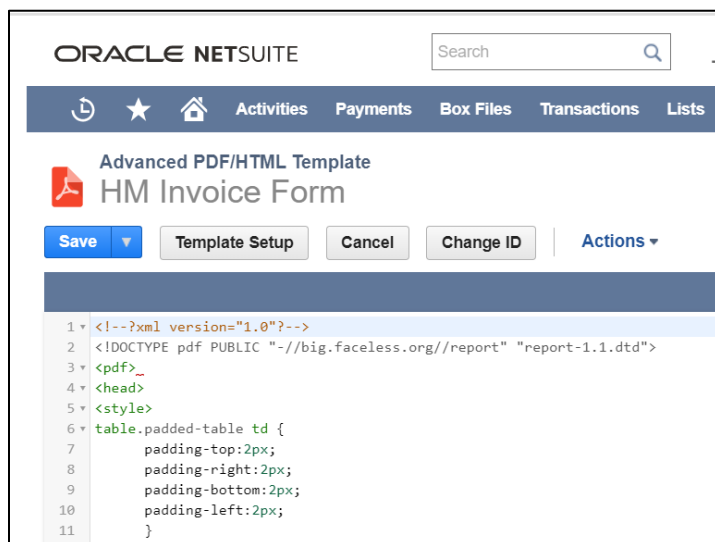
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2. Select **Edit** to make changes to an Advanced PDF/HTML Template.



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

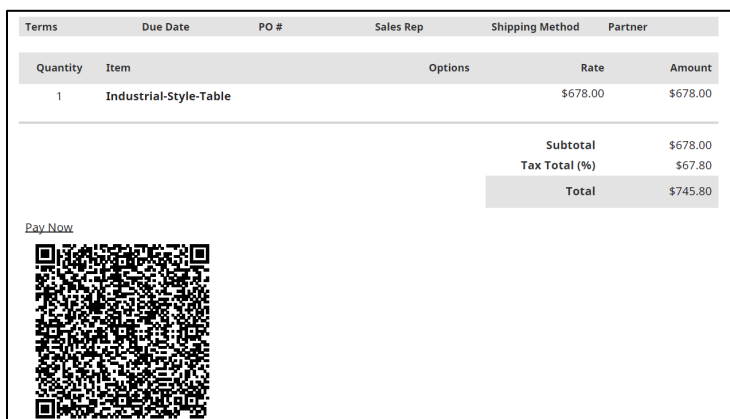
- a. To add the QR code to statement links, after `Pay Link Text` and inside the `<#if meURL?has_content>` statement add the following code snippet.

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

- b. To add the QR code to Link to Pay transaction links, after `Pay Link Text` 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**.



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.

The screenshot shows the Oracle NetSuite interface for creating an invoice. The 'Primary Information' section is visible, with the 'CUSTOMER' dropdown menu selected and showing '(Green Grocery)'. The 'DATE' field is set to 7/1/2020, the 'INVOICE #' is INV10000048, the 'POSTING PERIOD' is Jul 2020, and the 'TERMS' are Net 30.

- 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.



ORACLE NETSUITE

Search

Customer
Green Grocery

TYPE Company

ADDRESS
Green Grocery
1234 Justin Ave.
Glendale CA 91201
United States Map

Information Financial Address Access Workflow Collections Info Web Activity Bank Payment Details (Debit) Bank Payment Details (Credit) Org Chart SuiteSocial Box Fi

COMPANY NAME Green Grocery PHONE 510-876-5467 SALES REP Mary Redding
NO. OF EMPLOYEES FAX TERRITORY
SUBSIDIARY Honeycomb Mfg E-MAIL purchasing@greengroc.com INITIAL LEAD SOURCE Keyword-Yahoo Marketing / Overture-Office suppl
ANNUAL REVENUE LANGUAGE PARTNER
NUMBER FORMAT DEFAULT ORDER PRIORITY
NEGATIVE NUMBER FORMAT COMMENTS
WEB ADDRESS

CONTACTS Activities Messages User Notes System Notes Opportunities Transactions Items Cases Campaigns Files Subcustomers Jobs

CONTACT ROLE

New Contact Attach Update Primary Customize View

| EDIT | NAME | COMPANY | JOB TITLE | PHONE | EMAIL |
|------|--------------|---------------|-----------|--------------|--------------------------|
| Edit | Test Contact | Green Grocery | | 510-876-5467 | purchasing@greengroc.com |

EDIT BACK ACCEPT PAYMENT ADD NEW CARD ON FILE ACTIONS

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.



ORACLE NETSUITE HOWWANT

[Activities](#)
[Box Files](#)
[Payments](#)
[Transactions](#)
[Lists](#)
[Reports](#)
[Analytics](#)
[Customization](#)
[Documents](#)

CUSTOMER *
 Shyam Koppu

DATE *
 17-Jun-2020

INVOICE #
 INV10000151

POSTING PERIOD *
 Jun 2020

TERMS
 Net 30

DUE DATE
 17-Jul-2020

DEPARTMENT
 [Dropdown]

PO #
 [Text Field]

CUSTOM FORM *
 Z -HM Invoice Form

Sales Information

OPPORTUNITY
 [Dropdown]

SALES REP
 [Dropdown]

JOB
 [Dropdown]

MERCHANTS INVOICEPAY CONFIG
 InvoiceLink Test Config

EMAIL
 skoppu@MerchantE.com

MERCHANTS INVOICELINK END CU
 InvoiceLink Test Config

SUBSIDIARY
 Honeycomb Mfg.

CONTACT(S)
 [Text Field]

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

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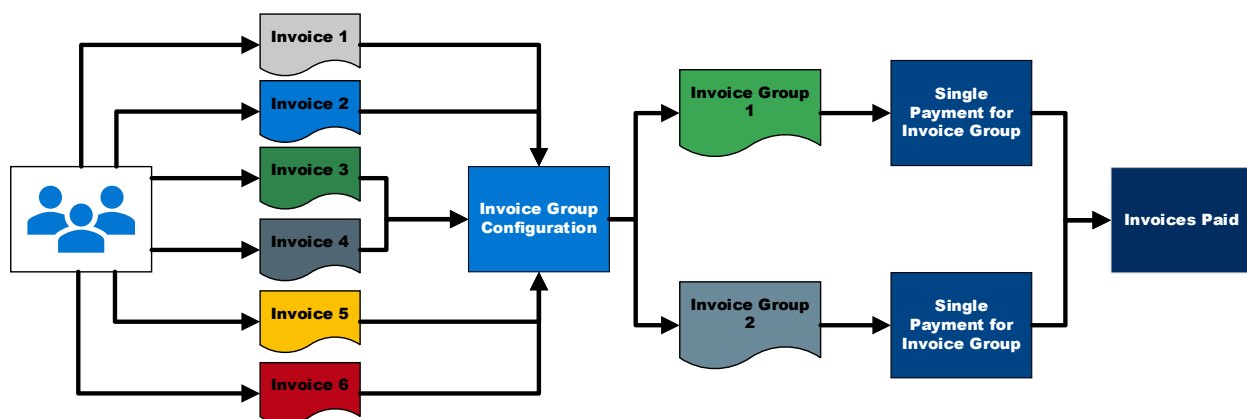


customer.

*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.

Billing

- BILL COSTS TO CUSTOMERS**
BILL TIME, ITEMS AND EXPENSES TO INDIVIDUAL CUSTOMERS FOR REIMBURSEMENT.
- ADVANCED BILLING**
ALLOWS SERVICE COMPANIES TO MANAGE RECURRING BILLING ON SALES ORDERS.
- CHARGE-BASED BILLING**
CHARGE-BASED BILLING ALLOWS BILLABLE VALUE TO BE EXPRESSED AS CHARGES AND BILLED TO CUSTOMERS.
- BILLING ACCOUNTS**
VIEW AND CONFIGURE THE ITEMS/SERVICES IN RECURRING INVOICES FROM SUBSCRIPTIONS, PROJECTS, AND SALES ORDERS.
- BILLING OPERATIONS**
CREATE AND MANAGE BILLING OPERATIONS, BILLING OPERATION SCHEDULES, BILLING GROUPS, AND INVOICE APPROVALS.
- ADVANCED SUBSCRIPTION BILLING**
CREATE ADVANCED SUBSCRIPTIONS AND BILL CUSTOMERS FOR THEM, INCLUDING USAGE, ENHANCED SUBSCRIPTION RENEWALS, AND LIMITS FOR VOLUME PRICING.
- INVOICE GROUPS**
GROUP MULTIPLE INVOICES BEFORE SENDING THEM TO A CUSTOMER. CREATE AND MANAGE 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.



| Information | Financial | Address | Access | Workflow | Collections | Info | Web Activity | Bank Payment Details (Debit) | Bank Payment Details (Credit) |
|--|-----------|---|--------|---|-------------|---|--------------|------------------------------|-------------------------------|
| PRIMARY CURRENCY * USA | | PRICE LEVEL TAXABLE | | SHIPPING ITEM SHIP COMPLETE | | DEFAULT RECEIVABLES ACCOUNT Use System Preference | | | |
| TERMS START DATE 5/20/2017 | | TAX ITEM | | ALCOHOL RECIPIENT TYPE Consumer | | SHIPPING CARRIER UPS | | | |
| CREDIT LIMIT HOLD Auto | | BALANCE CONSOLIDATED 374.00 374.00 | | OVERDUE BALANCE CONSOLIDATED 375.00 375.00 | | SET CUSTOMER CREDIT ON HOLD | | | |
| DAYS OVERDUE CONSOLIDATED 1,579 1,579 | | DEPOSIT BALANCE CONSOLIDATED 0.00 0.00 | | UNBILLED ORDERS CONSOLIDATED 12,931.33 12,931.33 | | CURRENT SALES ORDER Sales Order #SLS0000428 | | | |
| | | | | | | 3RD PARTY BILLING ACCOUNT NUMBER | | | |
| | | | | | | 3RD PARTY BILLING ZIP | | | |
| | | | | | | 3RD PARTY BILLING COUNTRY United States | | | |
| | | | | | | 3RD PARTY BILLING CARRIER <input checked="" type="checkbox"/> GROUP INVOICES | | | |

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.

| Primary Information | |
|---|--|
| CUSTOM FORM * Standard Service Invoice | START DATE |
| INVOICE # To Be Generated | END DATE |
| CUSTOMER * 120 Test Company No Contact | POSTING PERIOD * Jul 2022 |
| BILLING ACCOUNT | DUE DATE 11/7/2022 |
| <input type="checkbox"/> RECURRING BILL | PO # |
| DATE * 11/7/2022 | MEMO |
| AS-OF DATE 11/7/2022 | <input checked="" type="checkbox"/> FOR INVOICE GROUPING |

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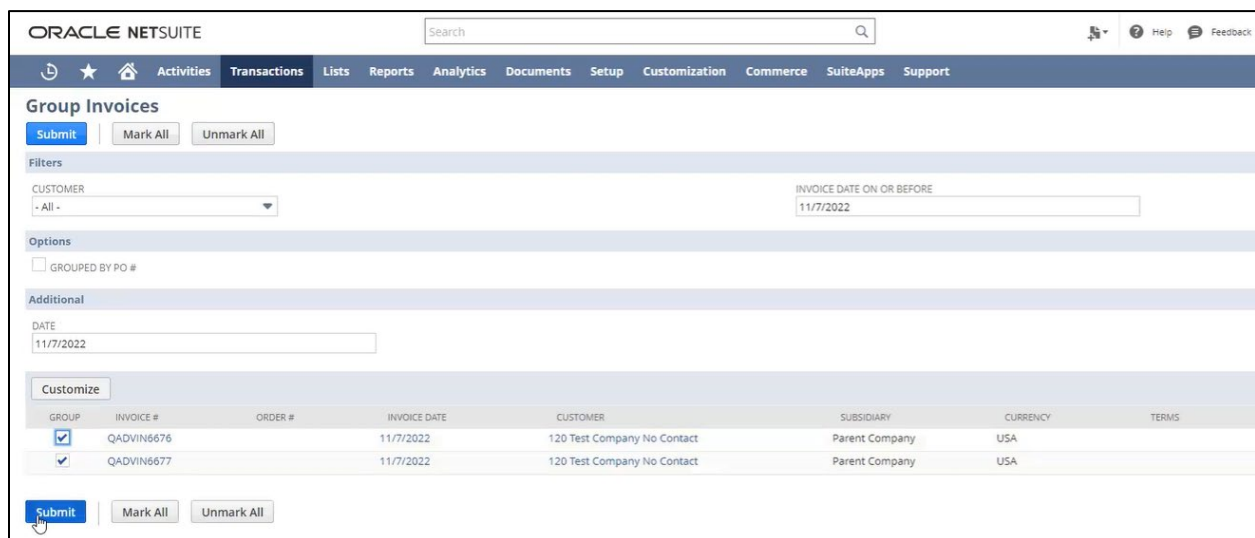


Note: When For Invoice Group is enabled for a customer, the customer Link to Pay details will not be displayed. The invoice can no longer be sent for payment individually.

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

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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**.

The screenshot shows a software interface with a dark blue header containing tabs: **Details**, **Related Records**, **Communication**, and **System Information**. Below the header, there is a 'VIEW' section with a dropdown menu set to 'Summary', a 'Customize View' button, and a 'Remove From Group' button. Underneath is a table with two columns: 'EDIT' and 'INVOICE NUMBER'. The table contains two rows: 'Edit' with 'Invoice #QADVIN6602' and 'Edit' with 'Invoice #QADVIN6603'. At the bottom of the interface, there are buttons for 'Save', 'Cancel', 'New', and 'Actions'.

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.



Using Invoice Groups with MerchantE

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 MMY format
- CVV/CVC/CID for the card.

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

MERCHANTSM Your Account

\$5.00
Amount

Add Billing Details

First Name Last Name

Email Address

Street Address

City State

Zip Code Country

Continue To Checkout >

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.



MERCHANTSM
Your Account

\$5.00

Total Amount

Confirm your payment

Payment Summary

| | |
|--------------|------------------|
| Name | guest cc user |
| Payment Plan | One-Time Payment |
| Amount | \$5.00 |
| Card Number | 418908xxxxxx1656 |

✓ I'm not a robot

reCAPTCHA
Privacy - Terms

Confirm Order >

- 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:



MERCHANTSM
Your Account

Payment Confirmation

Confirmation #5002. Thanks for shopping with us.
An email invoice has been sent to testuser@g.com.

Merchant Information

| | |
|--------------|----------------|
| Name | Your DBA |
| City & State | SPOKANE, WA |
| Zip Code | 992122721 |
| Phone Number | (509) 232-5651 |

Transaction Information

| | |
|---------------|-------------------|
| Date & Time | 23/04/20 17:31:48 |
| Payment Plan | One-Time Payment |
| Amount | \$5.00 |
| Currency Code | USD |
| Approval Code | T7340H |

Card Information

| | |
|-----------------|-----------------|
| Card Number | 418908xxxxx1656 |
| Billing Address | 123 street |
| Zip Code | 12345 |

Exit

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.

The screenshot shows the 'Create Account' form on the MERCHANT website. At the top, the MERCHANT logo and 'Your Account' with a user icon are visible. The form title is 'Create Account'. It contains several input fields: 'First Name' (placeholder: 'Enter First Name'), 'Last Name' (placeholder: 'Enter Last Name'), 'Email Address' (placeholder: 'user@emailaddy.com'), 'Password' (placeholder: 'Enter password'), and 'Confirm Password' (placeholder: 'Enter password'). Below the password fields is a checkbox labeled 'Accept terms and conditions'. At the bottom of the form is a 'Save & Continue' button.

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.

The screenshot shows the 'Security Questions' form on the MERCHANT website. At the top, the MERCHANT logo and 'Your Account' with a user icon are visible. The form title is 'Security Questions'. Below the title is the instruction: 'Choose your security questions and provide your answers in the form below'. The form consists of three identical sections. Each section has a 'Question' dropdown menu and an 'Answer' text input field with a 'Placeholder' label. At the bottom of the form is a dark 'Register' button.

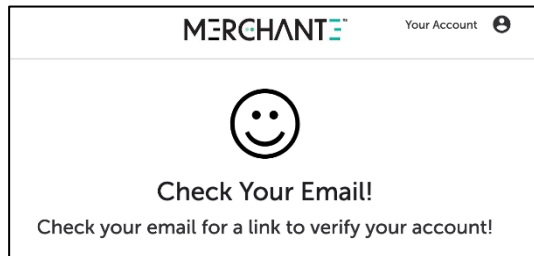
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- The customer selects three **security questions** and provides the **answers** for future use in case they forget their password. They must select three different security questions. After selecting the questions, the customer clicks **Register**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



- 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.

- 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.



MERCHANTSM Your Account

\$5.00
Amount

Add Billing Details

First Name Last Name

Email Address

Street Address

City State

Zip Code Country

[Continue To Checkout >](#)

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.



MERCHANT[™]
Your Account

\$5.00

Total Amount

Confirm your payment

Payment Summary

| | |
|--------------|------------------|
| Name | Jane User |
| Payment Plan | One-Time Payment |
| Amount | \$5.00 |
| Card Number | 418908xxxxxx1656 |

✓
I'm not a robot

reCAPTCHA
[Privacy](#) - [Terms](#)

Confirm Order >

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



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

MERCHANTSM
Your Account

Payment Confirmation

Confirmation #5002. Thanks for shopping with us.
An email invoice has been sent to testuser@g.com.

Merchant Information

| | |
|--------------|----------------|
| Name | Your DBA |
| City & State | SPOKANE, WA |
| Zip Code | 992122721 |
| Phone Number | (509) 232-5651 |

Transaction Information

| | |
|---------------|-------------------|
| Date & Time | 23/04/20 17:31:48 |
| Payment Plan | One-Time Payment |
| Amount | \$5.00 |
| Currency Code | USD |
| Approval Code | T7340H |

Card Information

| | |
|-----------------|------------------|
| Card Number | 418908xxxxxx1656 |
| Billing Address | 123 street |
| Zip Code | 12345 |

Exit

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

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- City, State, ZIP code, and Country
4. The customer then clicks **Continue to Checkout** and the **Add bank account** screen is displayed.

MERCHANT[™]

\$10.00

Amount

Add bank account

Account Type

Personal Checking ▼

Routing Number

011000028

Account Number

111111111111111111

Confirm Account Number

111111111111111111

Save info for future use

Continue To Billing Details >

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.



MERCHANTSM

\$10.00

Total Amount

Confirm your payment

Payment Summary

| | |
|-----------------------|---------------------|
| Name | RegACH user |
| Payment Plan | One-Time Payment |
| Amount | \$10.00 |
| Routing Number | xxxxx0028 |
| Account Number | xxxxxxxxxxxxxxx1111 |

I'm not a robot

Confirm Order >

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.



- 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.

- 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.
- 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.



MERCHANTSM Your Account

Payment Confirmation

Confirmation #5002. Thanks for shopping with us.
An email invoice has been sent to testuser@g.com.

Merchant Information

| | |
|--------------|----------------|
| Name | Your DBA |
| City & State | SPOKANE, WA |
| Zip Code | 992122721 |
| Phone Number | (509) 232-5651 |

Transaction Information

| | |
|---------------|-------------------|
| Date & Time | 23/04/20 17:31:48 |
| Payment Plan | One-Time Payment |
| Amount | \$5.00 |
| Currency Code | USD |
| Approval Code | T7340H |

Card Information

| | |
|-----------------|------------------|
| Card Number | 418908xxxxxx1656 |
| Billing Address | 123 street |
| Zip Code | 12345 |

Exit

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.

The screenshot shows a dropdown menu with four options: VISA ...3748, DISCOVER ...3000, MASTERCARD ...1801, and a bank icon ...2747. Below the menu is a form with the following fields: Name on Card (John Boyega), Card Number (VISA ... 3748), Expiration MMY (1220), Street Address (1509 Grindylow Drive), City (Atlanta), State (GA), Zip (30000), and Country (USA). A red 'Remove Card' button is at the bottom.

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.

The screenshot shows two buttons: 'Add a new card' with a plus icon and a card icon, and 'Add a new bank account' with a plus icon and a bank icon.

Example of the Card and Bank Information Fields:



| Card Information | | Bank Information | |
|---|--|---|---|
| Name on Card <input type="text"/> | Card Number <input type="text"/> | Account Type Checking <input type="text"/> | Routing Number <input type="text" value="00000000"/> |
| Expiration MMY <input type="text"/> | CVV/CVC/CID <input type="text"/> | Account Number <input type="text" value="00000000"/> | Confirm Account Number <input type="text" value="00000000"/> |
| Street Address <input type="text"/> | | <input type="button" value="Add Bank Account"/> <input type="button" value="Cancel"/> | |
| City <input type="text"/> | State <input type="text" value=""/> | | |
| Zip <input type="text"/> | Country <input type="text" value=""/> | | |
| <input type="button" value="Add Card"/> <input type="button" value="Cancel"/> | | | |

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.

| Change Password |
|--|
| Current Password <input type="text"/> |
| New Password <input type="text"/> |
| Confirm New Password <input type="text"/> |

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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Security Question

Enabling this will provide an extra layer of security for your account and allow us to verify your identity if you need to reset your password.

Question 01

What is your favorite childhood movie?

Answer 01

.....

Question 02

What is your favorite restaurant?

Answer 02

.....

Question 03

Who is your favorite Hollywood celebrity?

Answer 03

.....