

## What's New 5.5 - Payment Link

BisTrack and BisTrack Cloud now have functionality that allows you to process credit card transactions remotely.

This is especially useful when cash customers place a phone order for delivery.

This course demonstrates how to send a payment link to the customer from a sales order in BisTrack 5.5 and BisTrack Cloud.

A new 'Delivered' cash order has been entered and is 'Completed'.

The Sales Order Completion window now has a new 'Payment link' option.

Click the 'Send' button.

The 'Send Email' window is displayed with the details set in the 'Send payment link' template which is also used to choose the layout of the sales order being sent in the email.

BisTrack automatically enters the email address for the 'Contact' on the sales order.

If it's blank or incorrect, you can enter the address here.

The sales order number and company details are listed in the 'Subject' field. You can edit this if necessary.

The email body contains a link that the recipient clicks to enter their credit card details.

Click the 'Send' button or press 'F12'.

When returned to the Sales Completion window, click the 'Next' button.

Complete the sales order as you normally would.

The last window displays the 'Tasks for completion' and includes instruction to 'Email a payment link' to the customer.

Click 'Finish'.

The customer receives the email that includes the link and a copy of the sales order in pdf format.

To process the payment, they simply click on the link.

A window opens and displays the payment amount outstanding and the fields to enter their credit card payment information.

The payment entered is posted directly against the sales order.

You can also send the payment link for an existing cash order.

First from 'Find Documents', select the order.

Then from the right-click menu select 'Deposits and Payments'.

From the Orders Deposits and Payments window, select the 'Email Link' option.

This opens the email template the same as for a new order.

Proceed to complete the email then 'Send' to the customer.

To demonstrate sending a payment link through BisTrack Cloud, let's look at a new order entered for a cash customer.

On the 'Customer' page, we selected a 'Contact Name' from those on file.

BisTrack adds the Contact E-mail and can be edited it if needed.

If the customer record does not contain a contact's email, you can enter it here.

With the products added to the order, select the 'Summary' icon.

Select the new 'Email Link' option.

This submits your order and returns you to the Home page.

The customer follows the link in the email to process their payment the same as was previously demonstrated.

When viewing an outstanding cash order in BisTrack Cloud, the 'Email Link' option is available.

First select the 'Documents' tile, and then the 'Orders' tile.

Choose the order that you want to view using any of the available search filters.

The new 'Email Link' option is available in the left pane.

Selecting it sends the payment link email to the customer contact.

The payment link functionality makes it easy and convenient for customers to pay for sales orders without having to come into your location.

You should now be familiar with using the payment link option from both BisTrack and BisTrack Cloud.

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