

Payments

Quick Start Guide

Global Payments

Pay by Link

Transform any digital channel into a checkout!

Introduction

Global Payments offers merchants a wide variety of leading payment technology solutions, all from one reliable source. As one of the world's largest and most trusted payment technology solution providers, Global Payments combines industry-leading expertise with over 50 years of Canadian-specific experience. This power combination allows us to deliver comprehensive solutions that are personalized to your needs. This guide is your primary source of information for operating, setting up, and installing the Global Payments Pay by Link Mobile application.

For questions or support, please contact Global Payments Customer Care.

General tips

The following tips will help ensure you continue to process smoothly with Global Payments Canada:

1. This reference guide contains information on the features and functions capable on your app, as well as basic troubleshooting techniques. Keep this guide handy.
2. Your batch closes automatically at midnight, local time. Funds should be available the next business day. (Excluding weekend and holidays). Reach out to support for any out of balance issues.
3. If you have a problem with the app, ensure you are running the latest version by checking the Play Store / App Store. You can check the version of the app once logged in, by clicking on the cogwheel at the top right and then scroll down to Application Version.
4. The Global Payments Canada Customer Service line is open 24 hours a day, 7 days a week, to ensure there is always someone available to assist you.

Getting started

Click the following link:

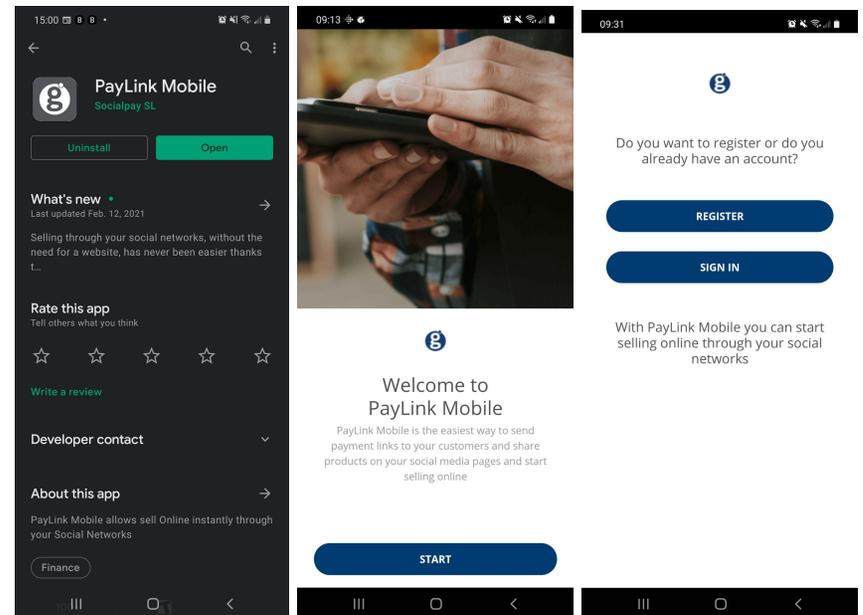
<https://play.google.com/store/apps/details?id=io.truust.paybylink>

Or navigate to the app store and Search for Pay by Link Mobile by Global Payments, and Install and then click **Open**.

The Global Payments logo will appear and you will get started on the Welcome Screen.

Once you click Start, you will be offered the options to:

REGISTER or SIGN IN



Register

Enter your email Address, company name, select Canada as a Country, and then create and confirm your password.

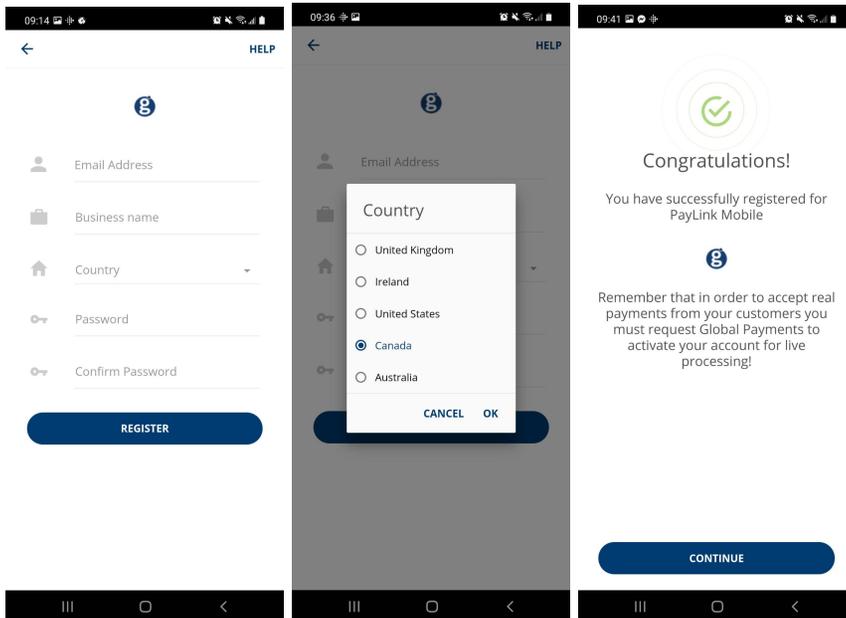
Here are the password restrictions:

At least 8 characters. At least 1 number, containing at least 1 capital, at least 1 small case, and at least 1 special character.

Example: Registration\$1234

You should now be taken to a screen confirming you have successfully registered.

Clicking **CONTINUE** will lead us to the Sign In page.



Registration email

Once you have entered all the information required to register an account, a welcome email will be sent.

This includes information about contacting the support team, your business name for reference and lastly, a link to confirm and activate your account.

Once the account has been activated, we are ready to go to the login page and sign in.



Hi hexersound@gmail.com.

Thank you for downloading Global Payments Social Commerce - you're one step closer to taking payments through your social network.

Your business name for reference is: Hexer Store

Now you've downloaded the Global Payments Social Commerce app, you can easily create products and share payment links through your different social networks without the need for any integration or coding.

Remember, before you can start taking any payments from your customers, your account must be fully activated, to do this click [here](#).

If you have any questions or need help getting started, including setting up a merchant account, simply get in touch with us in any of the following ways:

<https://www.globalpaymentsinc.com/en-gb>

Call: 0345 702 3344*

If you have a speech or hearing impairment, you can call us using the Relay Service by dialling 18001 followed by 03457 023344**

Email: customer.services@globalpay.com

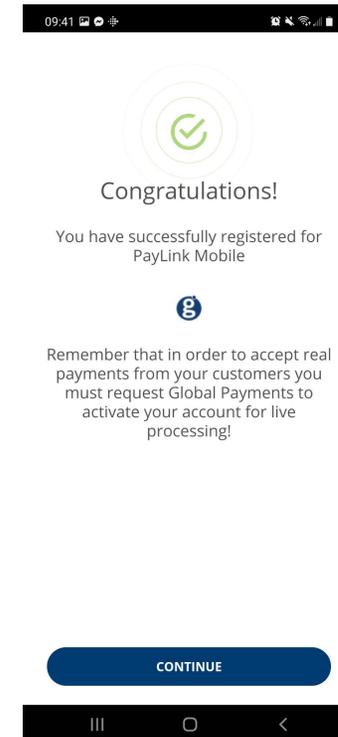
Regards,

Global Payments Social Commerce Team

* Lines are open 5 days a week, from 9am to 6pm except weekends and public holidays.

** Lines are open between 9am - 5pm Monday to Friday, except public holidays.

To help us continually improve on our service and in the interests of security, we may monitor and/or record your telephone calls with us. Any recordings remain our sole property. We also provide a Global Payments Textphone service on 0345 602 4818.



Sign in

Enter your Email address, Business name, and the password you have created via the registration email.

Here are the password restrictions:

At least 8 characters.

At least 1 number, containing at least 1 capital.

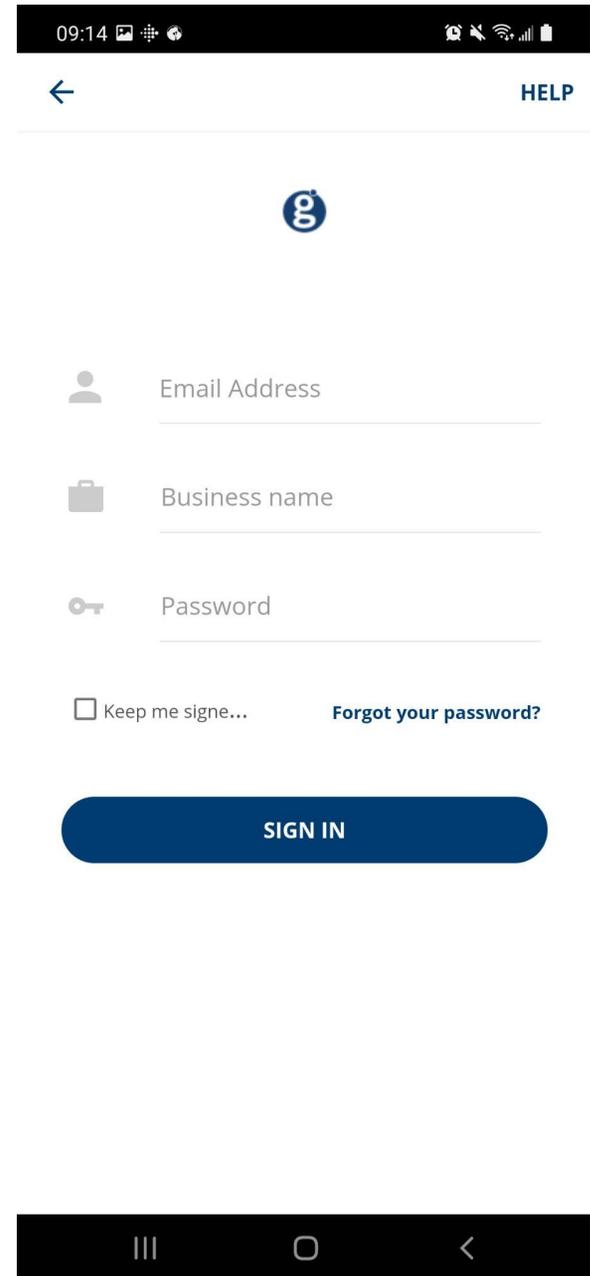
At least 1 small case.

At least 1 special character.

Example: Registration\$1234

You should now be taken to a screen confirming you have successfully registered.

Clicking **CONTINUE** will lead us to the Sign In page.

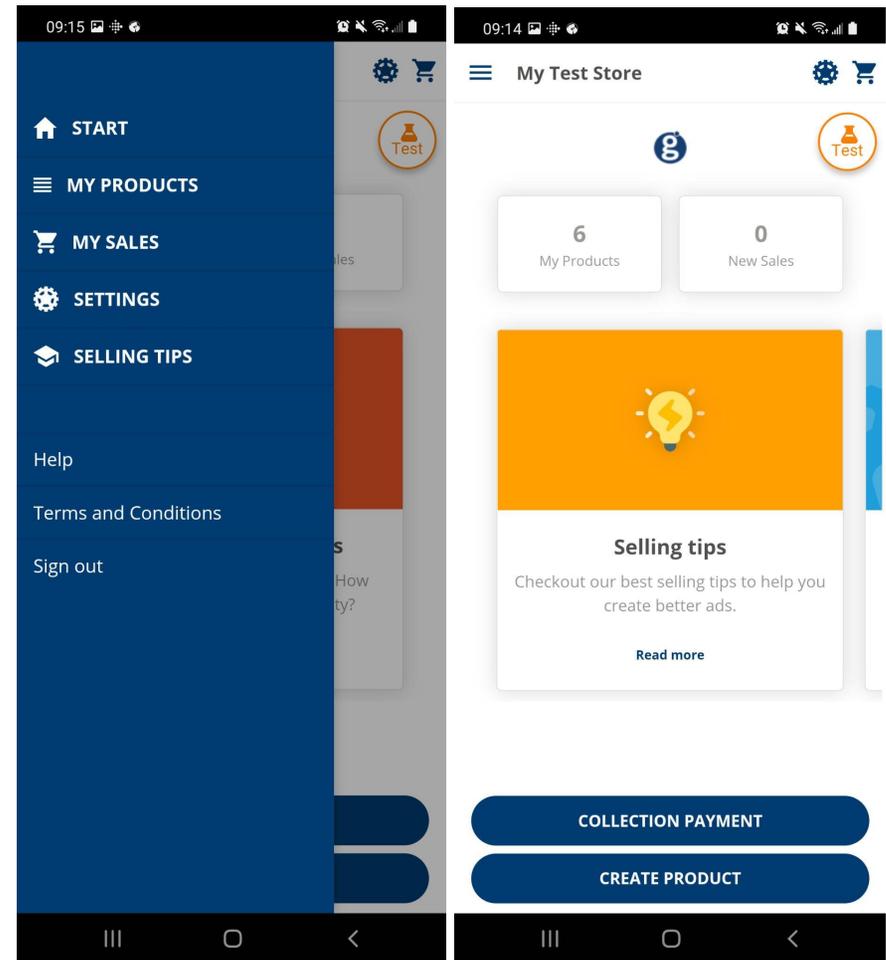


The image shows a mobile application sign-in screen. At the top, there is a status bar with the time 09:14 and various icons. Below the status bar is a navigation bar with a back arrow on the left and a 'HELP' link on the right. The main content area features a circular logo with the letter 'g' in the center. Below the logo are three input fields: 'Email Address' with a person icon, 'Business name' with a briefcase icon, and 'Password' with a key icon. At the bottom of the input fields, there is a checkbox labeled 'Keep me signe...' and a link 'Forgot your password?'. A large blue button labeled 'SIGN IN' is positioned below the input fields. At the very bottom, there is a black navigation bar with three icons: a hamburger menu, a home button, and a back arrow.

Dashboard

The main page which allows you to track your products, sales, create products, and generate payment links.

- My Products (See current and add products)
- New Sales (Manage and track ads)
- Collection Payment (Generate a payment link)
- Create Product (Create a product in your store)
- Selling Tips (Read More)
- Connect your social networks (Connect)
- There are new sales waiting (View my sales)

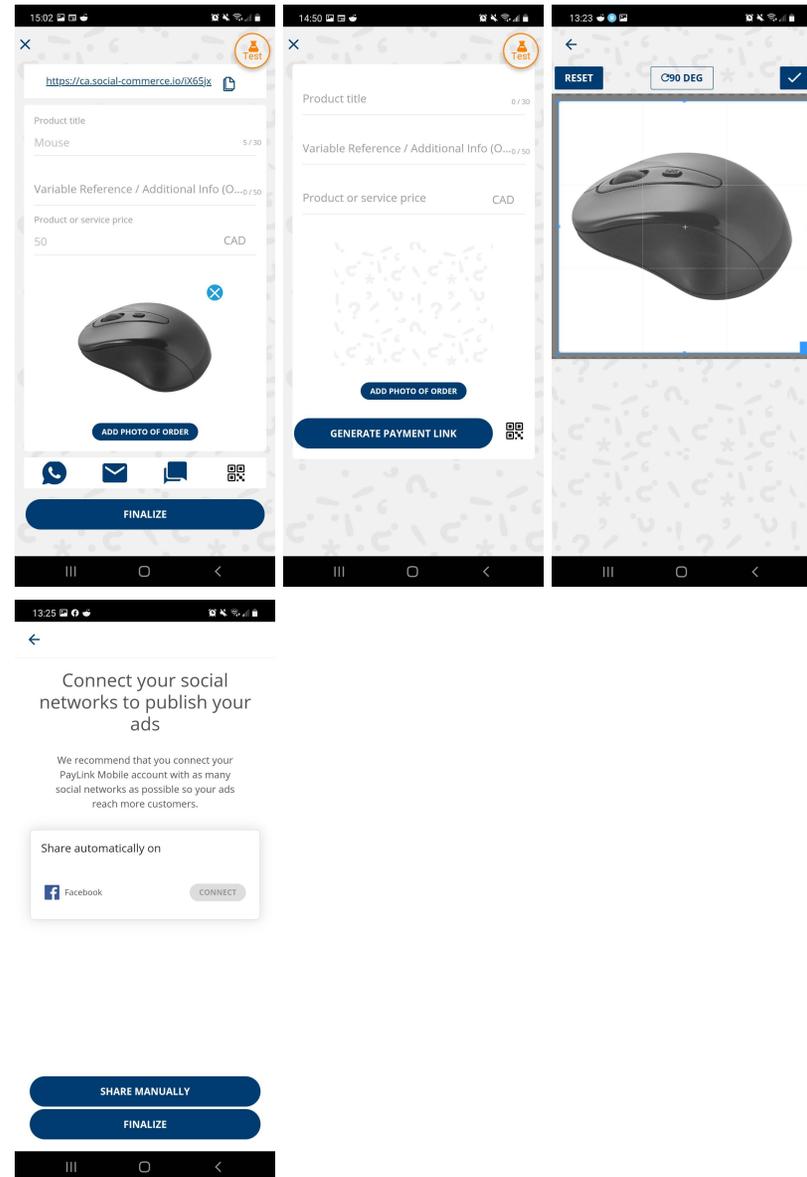


Create product / service

Enter the product title, an optional descriptor, and the final price of the product.

Add and crop a photo.

Review the order and click Finalize in order to share automatically to your social media page(s).



My Products

This section lets you browse the products you have that are either part of an Active or Inactive ad campaign.

Clicking an active listing will show you the various ways you have to share this ad in person as well as through your social media accounts. You may also Deactivate the ad if you wish to disable the ability to purchase this product, careful, you can not currently reactivate a listing once it has been deactivated.

Clicking an inactive listing will show you the details of an ad that has expired or reached the amount of units sold. This is for archive purposes only.

Collection payment

This feature allows you to create a product or a service which you can then assign an image and a price to it.

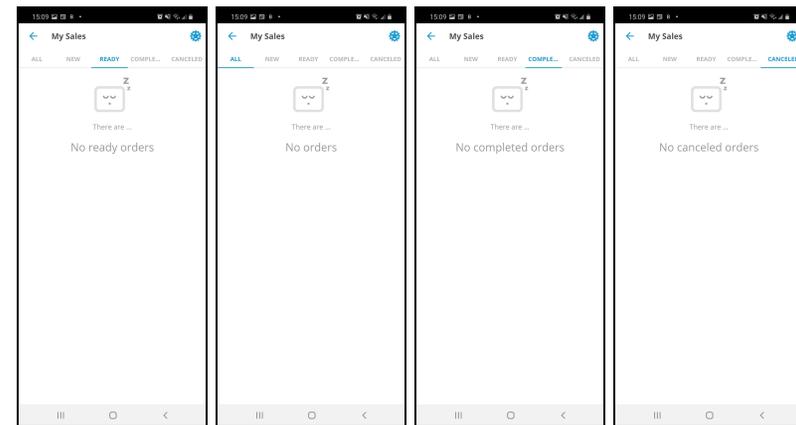
Once created, you will be able to quickly get the product or service you have created from your product list and share with your social media followers, send a link by SMS or email, or show a QR code for in-person transactions.

My Sales

You will start seeing data here as you sell items and services.

This section helps you track and organize your workflow by switching the status of a sales order.

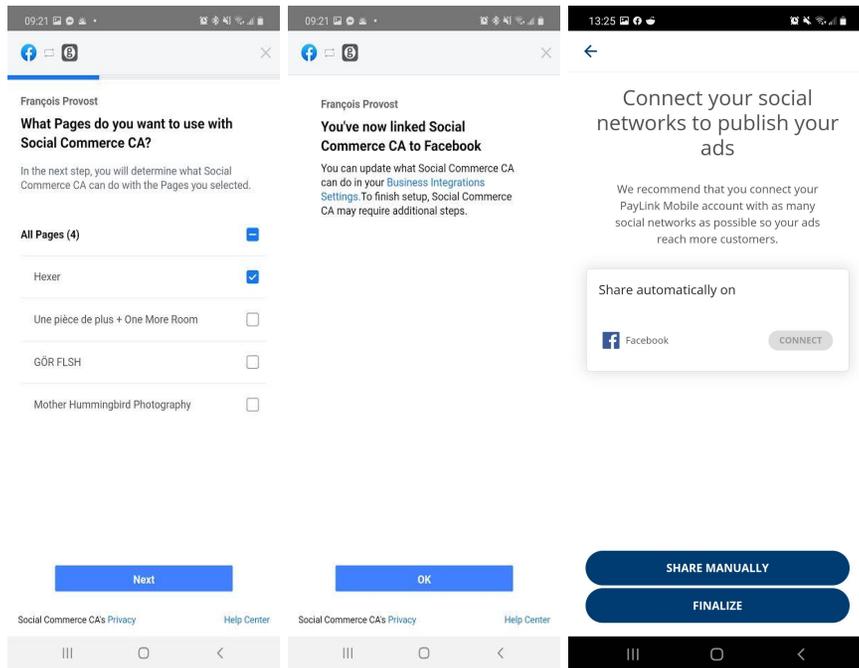
This allows for easy tracking of a sales order status to share in real time with the team in place handling and preparing orders for shipping for example.



Connect and manage your social networks

Link and accept directly from your Facebook Business page.

You can also share/send their product ad/payment link to virtually any social platform that is natively supported on your mobile device.



Settings

Manage Social networks:

Lets you Enable or Disable the ability to share with the account that you connected.

Personal Data:

Update the image

Displays your Merchant ID

Displays your Business Name. Contact support if this needs to be updated.

Lets you update the contact phone number.

Choose Language:

in which the app is displayed.

Application Version:

Informational only, this information may be asked while troubleshooting.

Selling tips

Receive orders from your Social Media

WhatsApp, Facebook, Twitter, Instagram...

Customers can send their shopping list easily.

Once the order is prepared, send the payment link to your client. Use our display to signal an express pick-up area without waiting.

Liquidate stocks

Flash sales through your social networks.

Liquidate large quantities of surplus product, or hold a limited-time sale.

Jump start your end-of-season sale.

Create a link indicating the amount and time availability and publish it on your social networks.

Customer loyalty

Create exclusive offers and promotions.

Ask customers to follow you on your favorite social networks to access exclusive offers.

Do you sell services?

Win the customer who does not want to move.

You no longer force the customer to come, or send a bank wire or transfer.

Generate a payment link that can be easily completed by your customer on their device.

Stop losing money with expired products and promote them online

Create a special price link with the available amount and the offer expiration date. Publish it on your social networks or send it to your regular customers.

Cross sales

Choose a product with a compelling price.

Generate a payment link with a striking photo and publish it on your social networks. Upon collection, offer the customer a complementary product.

Multiply your customers

You're no longer limited to face-to-face commerce.

Social networks are the perfect medium; create links and publish them to your community. Reward your most loyal customers who share and engage with your products and content. As your social network grows, so can your customer base.

Compete with big players

Offer your customer full service with home delivery.

Receive your orders on your social networks: WhatsApp, Facebook, Twitter, Instagram...

Deliver at the agreed time, do it yourself, or have it delivered.

Reporting

A separate platform with its own set of credentials called RealControl is used to pull daily settlement reports, create custom reports and transaction managements (Void + Refund)

To see sandbox/test transaction:

<https://realcontrol.sandbox.realexpayments.com/#/login>

To see production/live transaction:

<https://realcontrol.realexpayments.com/#/login>

For assistance accessing this platform:

+1 888 366 5110 (Option 1 – 1)

ca.ecomsupport@globalpay.com

When transactions are authorised they are sent to the acquiring bank for settlement. At this stage the transactions are referred to as settled transactions and are processed into batches which are created Monday through Friday.

For more information on specific batch times, please contact Global Payments.

Batch overview

To view 'Settled' transactions, click on '**Settled**' from the navigation menu on the left side of the screen.

Step 1

All settled transactions are grouped under a daily batch ID.

The screenshot shows the 'SETTLED' report interface. At the top, there is a search bar for batches with filters for Date (Jan 23 2018 - Feb 21 2018), Account (Select Accounts), Acquirer (Select Accounts), and Batch ID. Below the search bar, there is a table of settled transactions for Tuesday, 20 February 2018. The table columns include Batch ID, Time, Description, and various currency amounts (GBP, EUR).

Batch ID	Time	Description	50.00 GBP	(0.00) GBP	50.00 GBP
224784	21:53:54	AIB Merchant Services - 345345676	50.00 GBP 1	(0.00) GBP 0	50.00 GBP 1
224783	21:53:23	AIB Merchant Services - 345345676	50.00 GBP 1	(90.00) GBP 1	0.00 GBP 2
224782	18:54:28	AIB Merchant Services - 345345676	550.00 GBP 11	(0.00) GBP 0	550.00 GBP 11
224773	06:13:01	AIB Merchant Services - 345345676	0.00 GBP 0	(250.00) GBP 2	(250.00) GBP 3
224772	06:11:50	AIB Merchant Services - 945345676	250.00 EUR 5	(150.00) EUR 3	100.00 EUR 3
224760	05:44:02	AIB Merchant Services - 345345676	107.50 GBP 3	(57.50) GBP 2	50.00 GBP 3
224759	05:43:53	AIB Merchant Services - 345345676	50.00 GBP 1	(0.00) GBP 0	50.00 GBP 1
224758	05:43:24	AIB Merchant Services - 345345676	50.00 GBP 1	(50.00) GBP 1	0.00 GBP 2
224755	02:57:58	AIB Merchant Services - 345345676	750.00 GBP 15	(0.00) GBP 0	750.00 GBP 15
224745	01:35:49	AIB Merchant Services - 345345676	0.00 GBP 0	(0.00) GBP 1	0.00 GBP 1
224744	01:32:31	AIB Merchant Services - 345345676	400.00 GBP 8	(0.00) GBP 0	400.00 GBP 8
224742	01:05:41	AIB Merchant Services - 345345676	1,250.00 GBP 25	(0.00) GBP 0	1,250.00 GBP 25

Step 2

To view further information on the batch of settled transactions, click on the batch line. The Batch Overview screen will then be displayed.

BATCH BREAKDOWN BY ACCOUNT

Batch ID	Date/Time	Description	550.00 GBP	(0.00) GBP	550.00 GBP
224782	20/02/2018 18:54:28	AIB Merchant Services - 345345676	550.00 GBP 11	(0.00) GBP 0	550.00 GBP 11
aib			550.00 GBP 11	(0.00) GBP 0	550.00 GBP 11

Step 3

If you wish to generate a report based on the transactions within that batch, click on '**Generate Report**'.

Step 4

To view all transactions within the batch, click on '**View Transactions**'. Once you have clicked on 'View Transactions', you will be brought to the screen below:

globalpayments QUICK SEARCH Choose Criteria Enter Keyword EDITEDNAME EDITEDAPPELLIDO

MENU DASHBOARD TRANSACTIONS CUSTOMERS TERMINAL FRAUD MANAGEMENT SETTLED REPORTS QUICK LINKS PENDING DELAYED HELD VOIDED FAILED ADMINISTRATION CLIENT SETTINGS USER MANAGEMENT

TRANSACTIONS

GENERATE REPORT

SEARCH FOR TRANSACTIONS

Date: 16 Jan 2018 - 25 Feb 2018 Order ID: Customer Name: Card Number:

Show More Search Criteria SEARCH

List currently refined by: Date: 16/01/2018 - 25/02/2018 | Status: Batched | Payment Method: Card | Batch ID: 224782

Expand All

Date	Card	Merchant	Order ID	Amount	Status
20/02/2018 21:53:10	Visa	Giorgio Alpaca	EWvDn27meu	50.00 GBP	BATCHED
20/02/2018 21:53:02	Visa	Giorgio Alpaca	4wp8ZubX2A	50.00 GBP	BATCHED
20/02/2018 21:47:15	Visa	Giorgio Alpaca	GCq7b66W2k	50.00 GBP	BATCHED
20/02/2018 21:46:51	Visa	Giorgio Alpaca	j4keDkXjBH	50.00 GBP	BATCHED
20/02/2018 19:14:06	Visa	Giorgio Alpaca	uDbLkJOuLMeLFD4yuN...	50.00 GBP	BATCHED
20/02/2018 19:13:27	Visa	Giorgio Alpaca	JsqGtbHPwEoZimtlP9F...	50.00 GBP	BATCHED
20/02/2018 19:11:55	Visa	Giorgio Alpaca	4yuEUBMds	50.00 GBP	BATCHED
20/02/2018 19:11:36	Visa	Giorgio Alpaca	AYgwJdZrGw	50.00 GBP	BATCHED
20/02/2018 18:57:38	Visa	Giorgio Alpaca	fJPgBEuAyq	50.00 GBP	BATCHED
20/02/2018 18:54:52	Visa	Giorgio Alpaca	3w2nHJ6FBF	50.00 GBP	BATCHED
20/02/2018 18:54:25	Visa	Giorgio Alpaca	KYzQhe4VC	50.00 GBP	BATCHED

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globalpayments QUICK SEARCH Choose Criteria Enter Keyword EDITEDNAME EDITEDAPPELLIDO

MENU DASHBOARD TRANSACTIONS CUSTOMERS TERMINAL FRAUD MANAGEMENT SETTLED REPORTS QUICK LINKS PENDING DELAYED HELD VOIDED FAILED ADMINISTRATION CLIENT SETTINGS USER MANAGEMENT

TRANSACTION DETAILS

PRINT RECEIPT

BATCHED Date: Tuesday, 20 February 2018 21:53 Order ID: EWvDn27meu Account: alb Amount: 50.00 GBP

OVERVIEW FRAUD

RESULT

Response: Authorised (00) Transaction ID: 48995859 Message: AUTH CODE: PP8888 Batch ID: 224782 Pas Ref: 15191635901641237

Auth Code: PP8888 Recurring Flag: Reason for Last Action: -

PAYMENT METHOD: Visa CUSTOMER

Card Number: 434242****4242 Cardholder Name: Giorgio Alpaca Customer Name: Customer Number: 1234

Issuing Bank: Payment Method Country: Customer Reference: -

PRODUCT: Variable Reference: 1234 DCC

Comment: comment 1 There is no DCC (Dynamic Currency Conversion) setup for this account. For further information around DCC, please contact our support team.

HISTORY

Date	Type	Amount	Status	Action
Tuesday, 20 February 2018 21:53	Rebate	(50.00) GBP	Authorised (00)	PRINT RECEIPT
Tuesday, 20 February 2018 21:53	Auth	50.00 GBP	Authorised (00)	PRINT RECEIPT

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By selecting the plus sign on the left of the transaction, this will expand the transaction line allowing you to view more information on the transaction as below.

Alternatively you can also click on 'Expand All' which will display the extra details for all transactions in the batch.

You can click on each transaction line to view the individual transactions details for that transaction. The transaction details section gives you a view of the general information about the transaction as below.

Data mapping

There are fields within the app that will let you manually fill information. The information of some of these fields can be found within our RealControl reporting tool as well.

Once logged in RealControl, search for a specific transaction, click on it to access the Transaction Details screen, then scroll down to the History section.

Here are the fields you can populate within the app and their corresponding fields within RealControl:

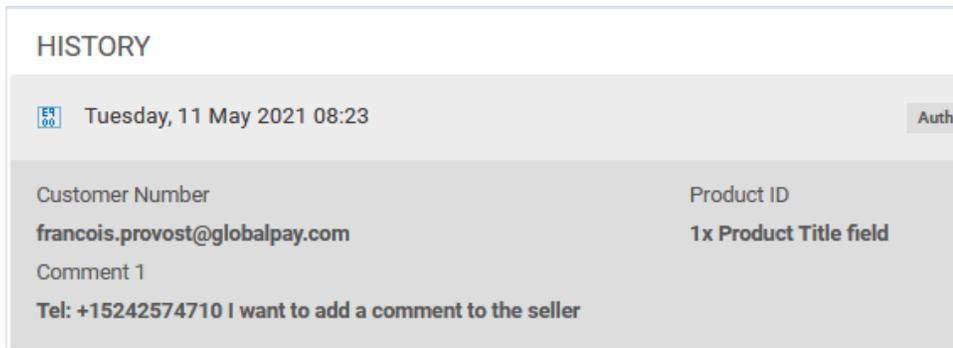
RealControl field = PLM Field

Customer Number <> Customer Email entered by the merchant, in the app.

Product ID = Product Name entered by the merchant, in the app.

Comment 1 = Comment entered by the seller, at checkout.

Comment 2 = Shipping information entered by the seller, at checkout.



The screenshot shows a 'HISTORY' section with a transaction entry for Tuesday, 11 May 2021 at 08:23. The entry includes a 'Customer Number' (francois.provost@globalpay.com), a 'Product ID' (1x Product Title field), and a 'Comment 1' (Tel: +15242574710 I want to add a comment to the seller). There is also an 'Auth' button in the top right corner of the entry.

Customer Number	Product ID
francois.provost@globalpay.com	1x Product Title field
Comment 1 Tel: +15242574710 I want to add a comment to the seller	

You can also search for multiple transactions and find this information as part of the reports you can export from RealControl's transaction menu.

Error

There are fields within the app that will let you manually fill information. The information of some of these fields can be found within our RealControl reporting tool as well.

Contact us:

+1 (888) 366 5110

ca.ecomssupport@globalpay.com