User Guide
Global Payments
Pay by Link

Transform any digital channel into a checkout!

globalpayments | ◯ **Desjardins**
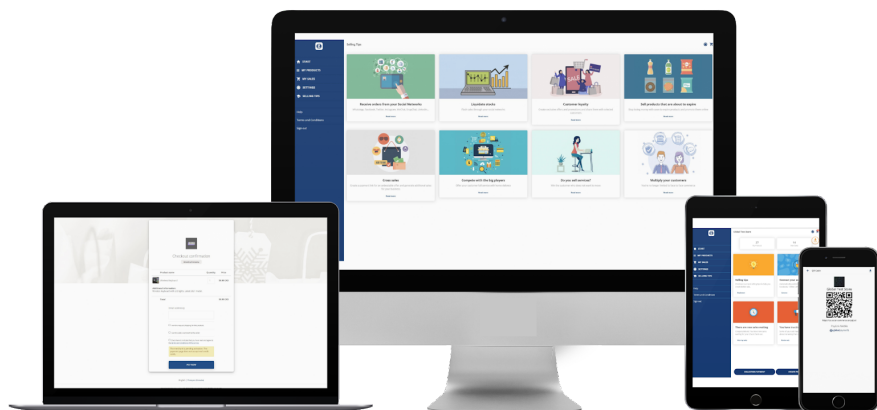
Introduction

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 powerful 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** application.

General tips

1. This guide contains information on the features and functions capable of 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 weekends and holidays).

3. When encountering application error, please ensure that you are running the latest version by checking the Google Play Store or iOS App Store. You can also check the version of the app once logged in, by clicking on the cogwheel (setting button) at the top right and then scroll down to the **Application Version** for version information.

4. The Global Payments Canada Customer Centre is open 24 hours a day, 7 days a week, to ensure there is always someone available to assist you.

Getting started

Visit the links below based on your device:
- Android devices: **https://play.google.com/store/apps/details?id=io.truust.socialCA**
- iOS devices: **https://apps.apple.com/ca/app/paylink-canada/id1520006939**

Or navigate to the app store and Search for **Pay by Link by Global Payments** or **Pay by Link Mobile**, 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

globalpayments   Innovation that delivers.
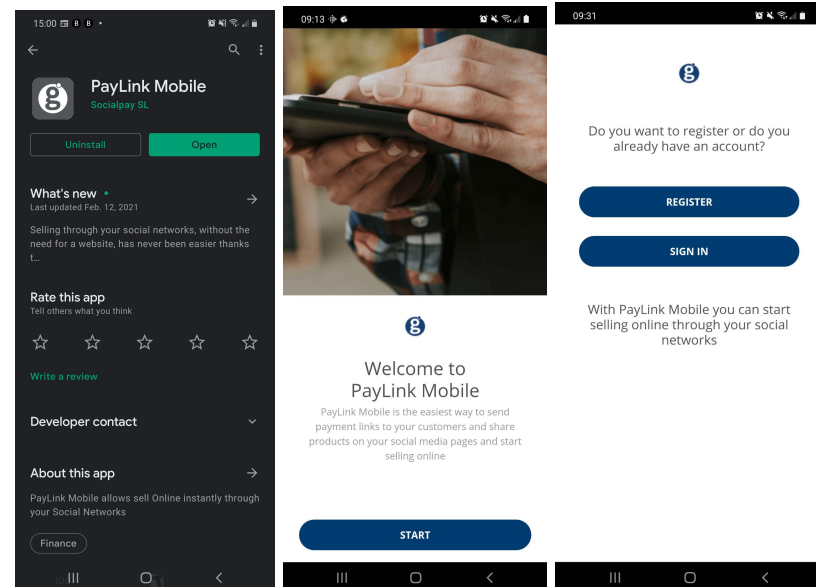
Register

Enter your email address, company name, select Canada in the country field, and then create and confirm your password.
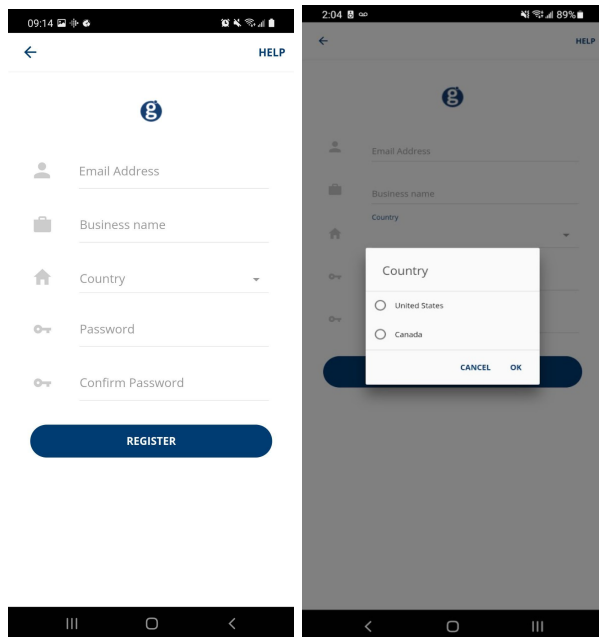
Password restrictions:
At least 8 characters. At least 1 number, containing at least 1 capital letter, at least 1 small case letter, and at least 1 special character.

Example: *Registration$1234*

Once complete, a screen will confirm that you are successfully registered.

Clicking CONTINUE will lead you 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 to your registered email address.

The welcome email 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.
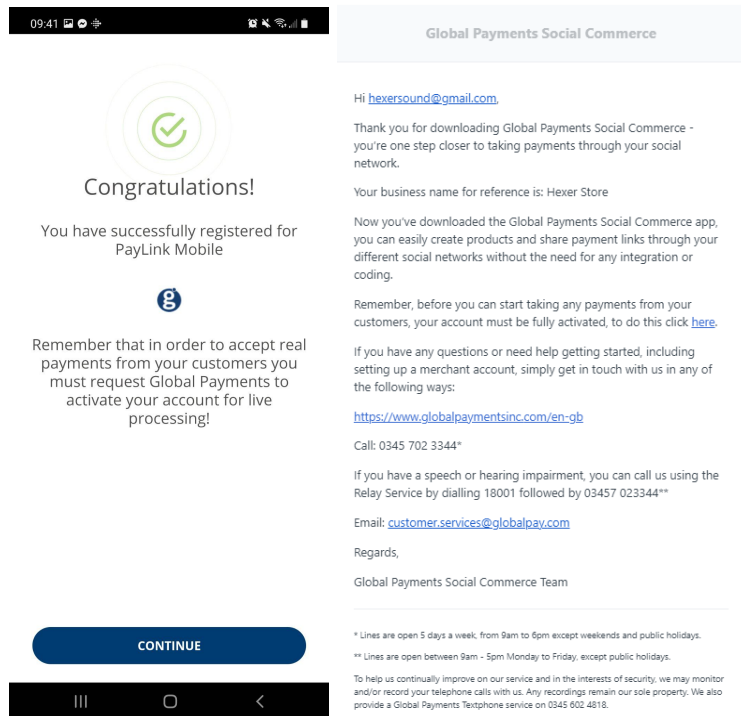
Sign in

Enter your email address, business name, and the password you have created through the registration email.

globalpayments   Innovation that delivers.
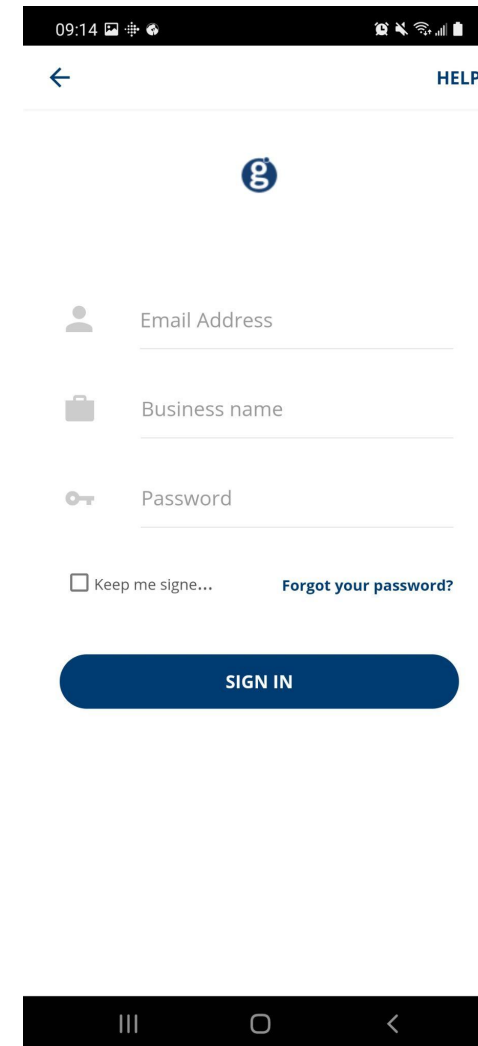
Dashboard

The main page allows you to track your products, sales, create products, and generate payment links. Here are the list of items and what they are:

- My Products (See current products and add new 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 about how to sell with Pay by Link)

- Connect your social networks (Connect to your preferred social networks)

- There are new sales waiting (View my new sales)

Here are some additional information about the two cards on the top of the main page:

**MY PRODUCTS**: This card shows the number of ACTIVE products/ads

NEW SALES: This card displays sales that are still flagged as "new". The number displayed will change in real time once the order status is changed or if a new sale comes in.

globalpayments   Innovation that delivers.
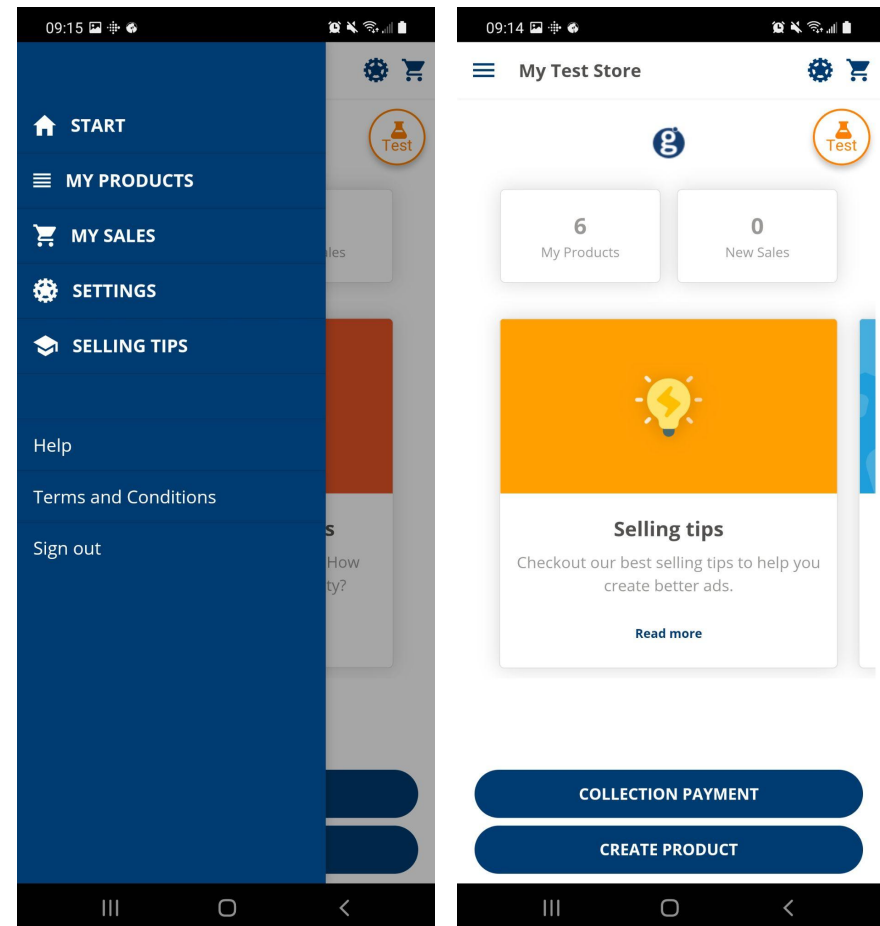
Connect and manage your social networks

Pay by Link allows you to link and accept payments 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.

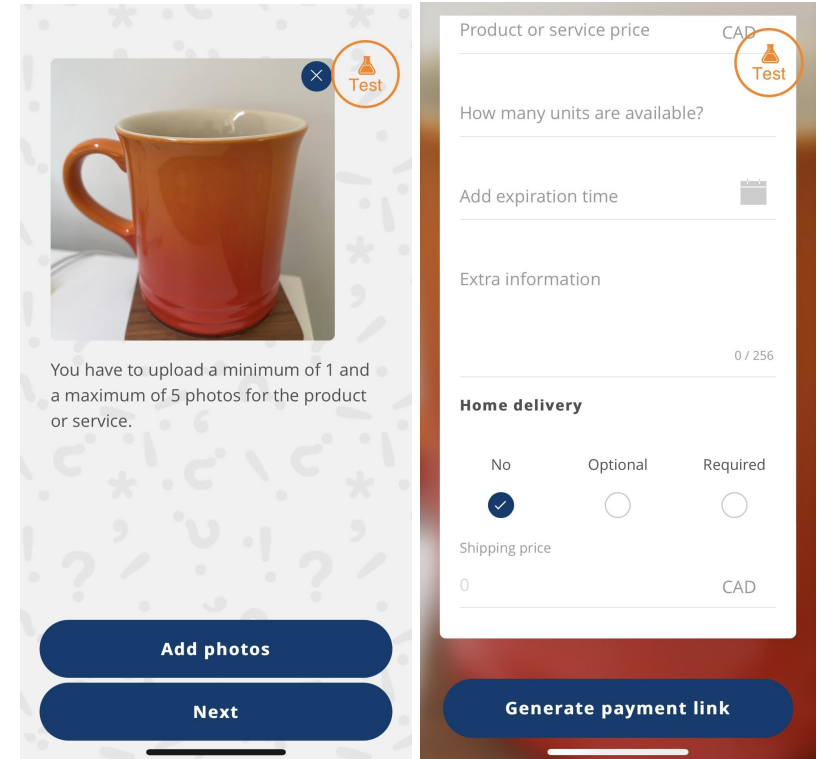**globalpayments** Innovation that delivers.
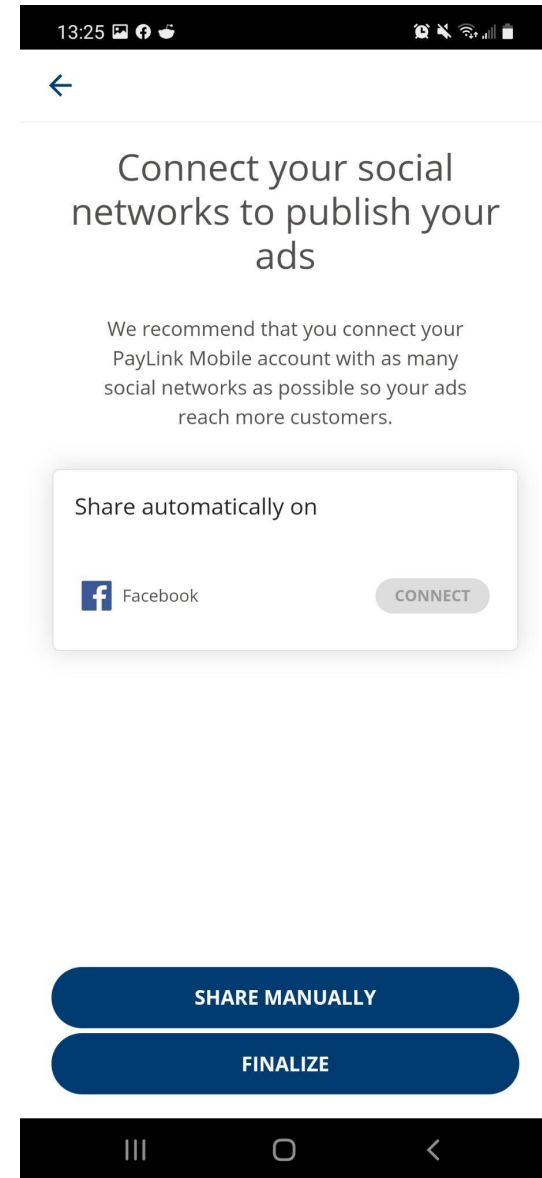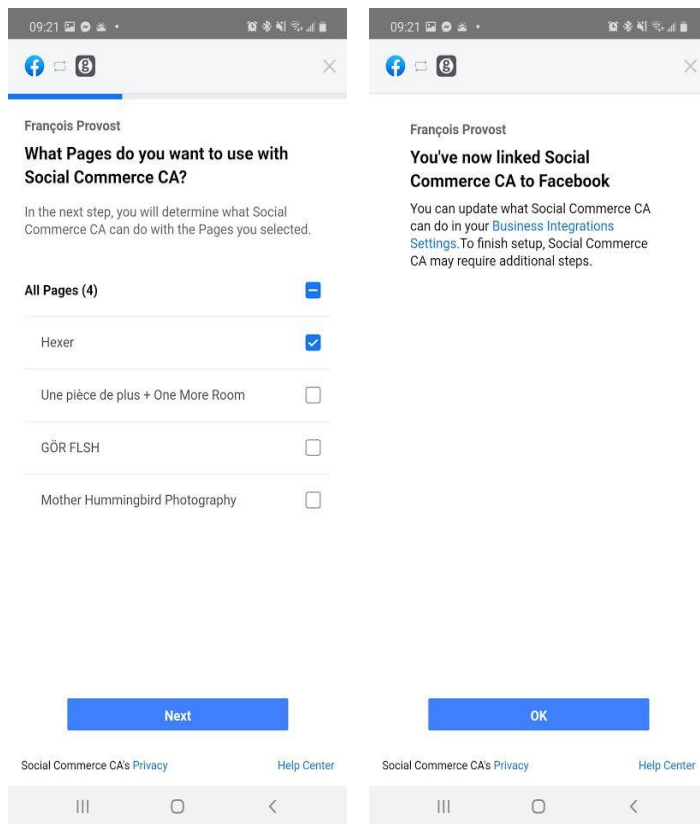
Create product/service

To create a new product/service, enter the title, an optional descriptor, and the final price.

Add and crop a photo.

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

Steps:

- Click **CREATE PRODUCT.**

- Click **ADD PHOTOS.**

- Take or upload a picture of your product.

- If you are satisfied with the photo you've taken, click OK.

- Use the editing tools to crop and confirm by clicking the checkbox.

- You can add more photos by clicking **ADD PHOTOS.**

- Once all the photos have been updated, click **NEXT.**

- Enter the product information such as Product title, service price, how many units are available.

- Set whether or not this ad should expire.

- Set whether or not there is shipping for this item, and if so, how much.

- Click **Generate Payment Link**.

globalpayments   Innovation that delivers.

My products

This section lets you browse the products that are either part of an **Active** or **Inactive** ads.

Clicking an active listing will present you the various ways you can 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. Please note that this is for archive purposes only.
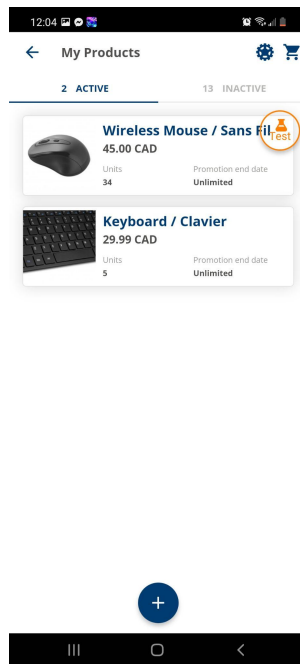
Sharing your ads

To share your ads through your preferred channel, navigate to the **My Products** section and click on an Active listing to see the product detail screen.

The following buttons are your sharing options.

You can share the link by clicking on the Copy icon that looks like two sheets of papers on top of each other. Once this has been clicked, you will be able to paste that link anywhere such as a private message or email.

From left to right, the sharing icons represent the following social media:

Facebook timeline, Instagram, Twitter, Whatsapp, Facebook business page(s), and lastly, create/generate a QR code.

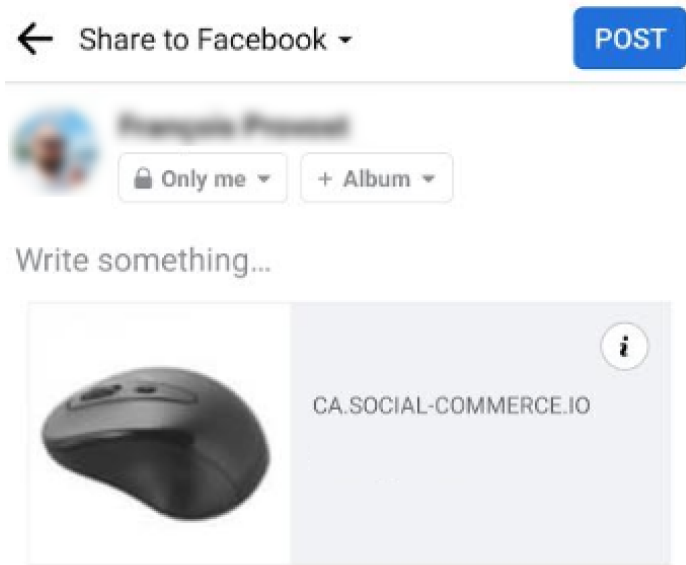Below is a sample of the generated QR code:

https://ca.social-commerce.io/PqMiKF

PayLink Mobile

globalpayments

When sharing to, for example, the Facebook timeline, your friends and followers will see the image, title, and description of the product or service you are listing.

They can then click on the link and be taken to the checkout page.

From the list of icons, choose the application/software to which you would like to publish or share your product's payment link.

The interface may vary across different smartphone brands.

Direct sharing buttons on all Android OS 10 (and earlier), all iOS devices, and Pay by Link Web remain unaffected.

Note: Please note that the inactive share button is a temporary issue and will be resolved in a subsequent update.

Note: Please note that if you are using Android OS 11 or 12, the direct share buttons may not be functional due to the latest Google security updates. If you are experiencing non-responsive buttons, please go to

the top right corner and tap the (share) icon:

globalpayments   Innovation that delivers.

Deactivate product or ad

To take down an active product/service from your listing, go to the main page (dashboard), click on **My Products**, and look under the **ACTIVE** tab.

Click on the specific product or ad you wish to deactivate.
Scroll down (if needed) and click the red DEACTIVATE button.
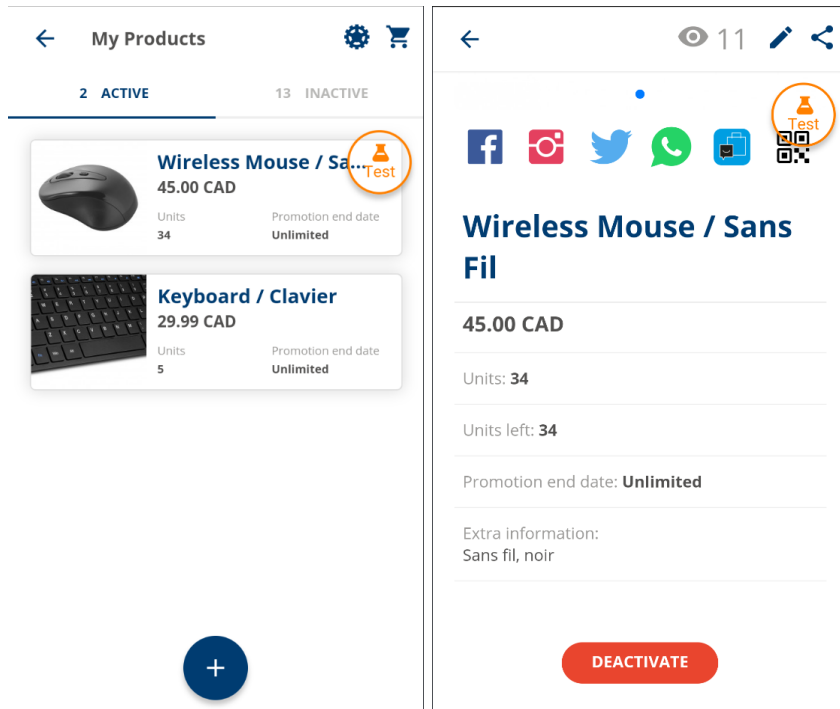
Once deactivated, the product will no longer be shown under the **ACTIVE** tab and can be found under the **INACTIVE** tab.
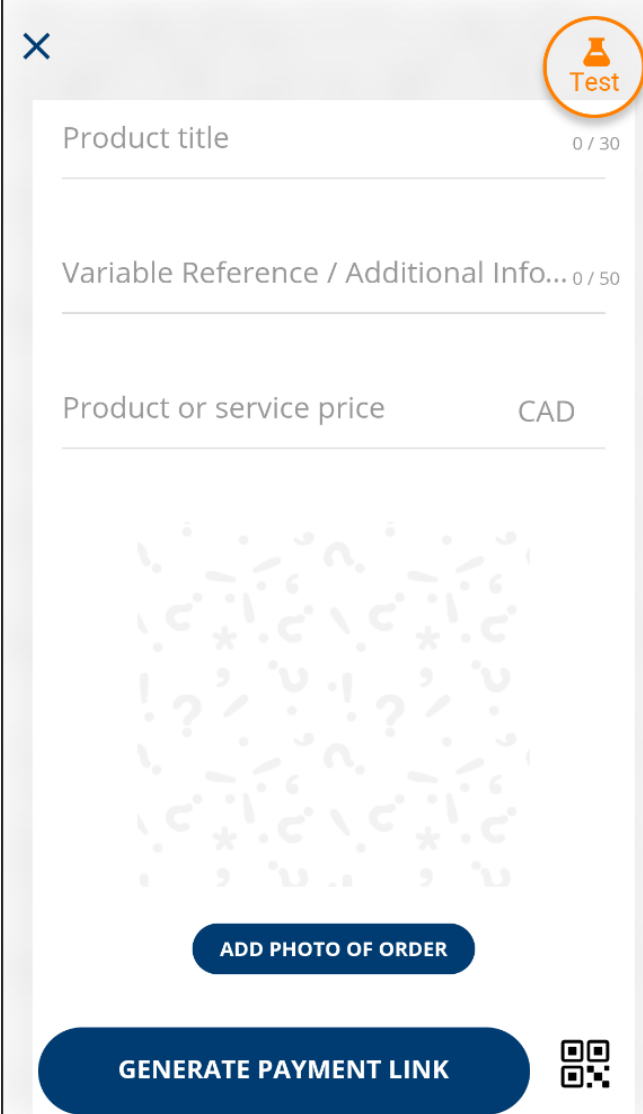
globalpayments   Innovation that delivers.
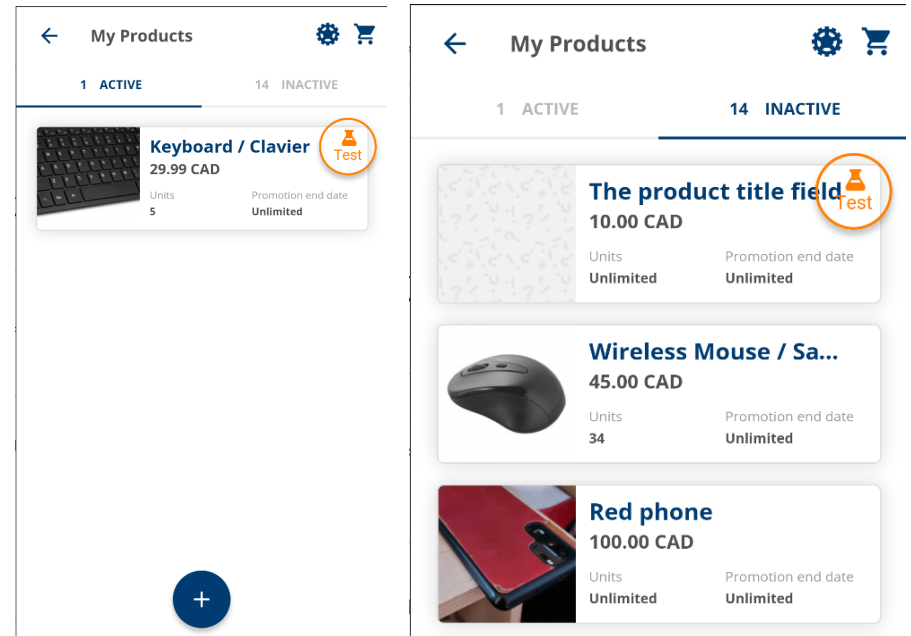
Payment collection

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

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.

Steps:

- Click **COLLECTION PAYMENT.**

- Enter the product title.

- Variable Reference.

- Product or Service Price.

- Click **Add Photo** to take or upload an image.

- If you are satisfied with your image, click **OK**.

- Use the editing tools to crop and confirm by clicking the checkbox.

- You can add more photos by clicking ADD PHOTO OF ORDER.

- Once all the photos have been updated, click **NEXT.**

- Enter the product information such as Product title, service price, how many units are available.

- Set whether or not this ad should expire.

- Set whether or not there is shipping for this item, and if so, how much.

- Click GENERATE PAYMENT LINK.

globalpayments   Innovation that delivers.

My sales

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

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

Suggested use:

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

You can assign protocols and procedures based on the order status.

The staff monitoring the orders will know what to do based on them.
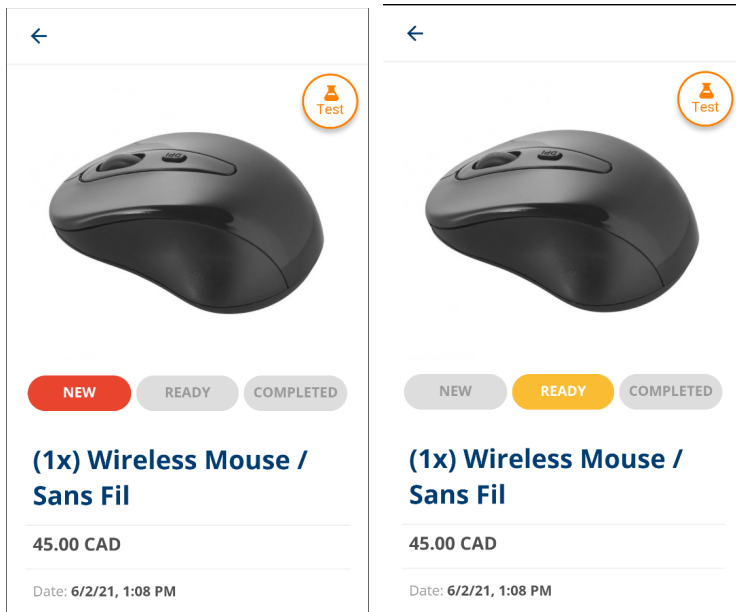
In the example above, the status of the order is manually changed from NEW to READY.
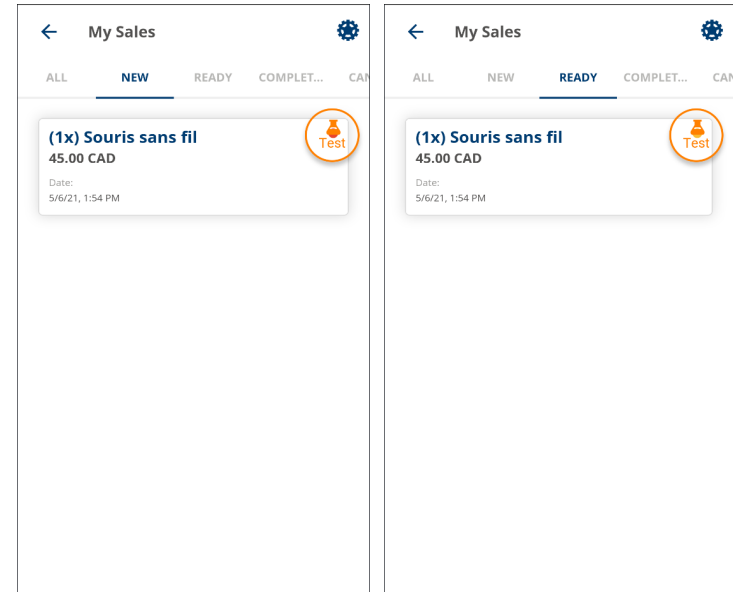
The Staff monitoring the My Sales section will now see that the order went from NEW to READY and can follow the procedures tied to this order status.

globalpayments   Innovation that delivers.

Settings

Manage social networks
This lets you enable or disable the ability to share with the social network accounts that are connected to your device.

Personal data
In this section, you can:
- Update your image
- See your Merchant ID
- See your Business Name. If this needs to be updated, please contact the Global Payments Support team.
- Update your contact phone number.

Return policy
Generic Policy: View the generic policy provided by Global Payments.
Own Policy: Under this section you can write your own return policy.

Choose language
Toggle between English and French. Changes will be applied once you're re-logged in to the app

Application version
This is for informational only, note that this information may be asked while troubleshooting.

globalpayments Innovation that delivers.

Transaction management

The Pay by Link mobile app allows you to:
- Track sales
- Send receipts by email
- Refund a transaction in full

To access this section Click the three horizontal lines also known as the Hamburger menu:
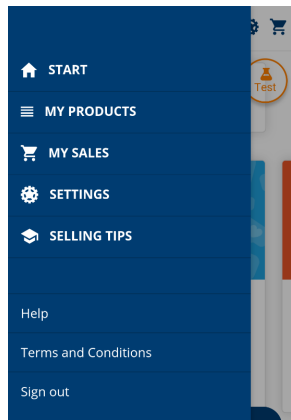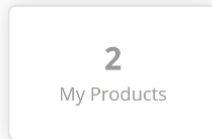
Track sales:
You may use the status buttons to keep track of an order.
This is updated dynamically to other team members so everyone in your team can follow an established operation procedure if they see an order has been placed or completed.
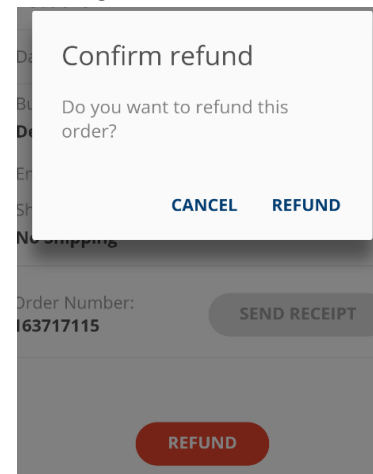

Send receipts by email:
In the case that the receipt needs to be sent to the customer once more, you can click the **SEND RECEIPT** button.

Refund transaction
Clicking the refund button will prompt you to refund the transaction in full.

globalpayments   Innovation that delivers.

Reporting

A separate platform with its own set of credentials called *RealControl* is used to pull your transaction reports, create custom reports, and perform administrative functions, such as void and refund.

To see sandbox/test transaction, visit:
https://realcontrol.sandbox.realexpayments.com/#/login

To see production/live transaction, visit
https://realcontrol.realexpayments.com/#/login

For any other assistance accessing the *RealControl* platform, please contact:
+1 888 366 5110 (Option 1 – 1)
ca.ecomsupport@globalpay.com

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

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.

Step 2
To view further information on the batch of settled transactions, click on the batch line. You will be directed to the **Batch Overview** screen.

Step 3
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 Transaction**. And you see the following screen:

globalpayments   Innovation that delivers.

Selecting the plus sign on the left of the transaction will expand the transaction line, which allows you to view more information on the transaction. Alternatively you can also click on **Expand All**, and that will display the details for all transactions within the batch.

You can click on each transaction line to view the individual transaction details.

globalpayments   Innovation that delivers.

Data mapping

There are fields within the app that will let you manually fill in information. The information of some of these fields can be found within our *RealControl* reporting tool. To access the platform, please refer to the Reporting section.

Once logged in to *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 = Telephone Number* Comment entered by the seller, at checkout.
- Comment 2 = Customer First and Last name + Shipping information entered by the seller, at checkout.

Only available when Delivery/Shipping is requested.

You can also search for multiple transactions and find this information as part of the reports available to be exported from *RealControl*'s transaction menu.

HISTORY	
🗓 Tuesday, 11 May 2021 08:23	Auth
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	

globalpayments   Innovation that delivers.
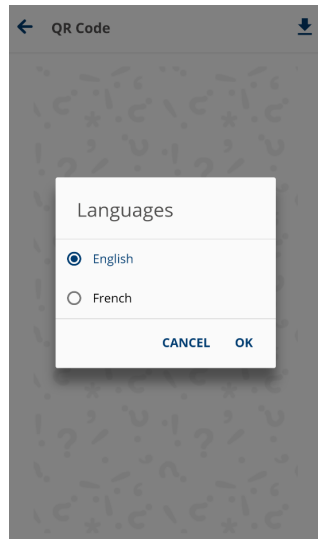
Multilingual checkout

It is possible for you to easily sell and advertise in both English and French. Simply click on the **QR code symbol** and you will be prompted by a language selection screen:
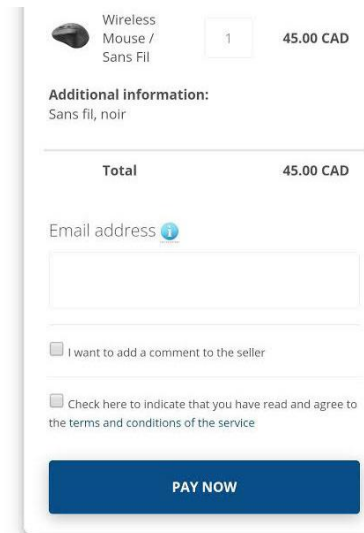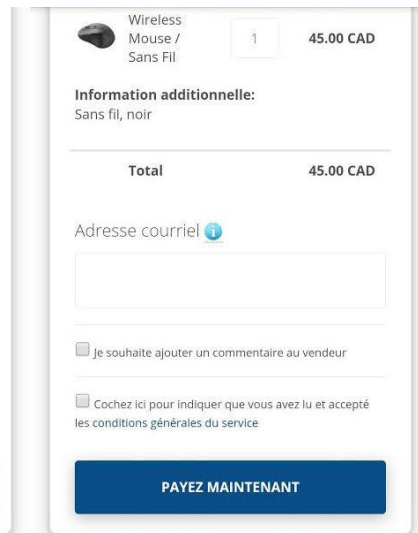

Wireless Mouse / Sans Fil

Scanning this QR code will lead to the language specific Checkout page:

---

globalpayments   Innovation that delivers.

The user may also select their preferred language using the button located under the PAY NOW button.

Once the user clicks the PAY NOW button, they will be redirected to the hosted payment page.

Payment Details

Total: 45.00 CAD

Card Number

VISA mastercard

Card Number

Expiry	Security Code
MM/YY	Security Code (?)

Cardholder Name

Cardholder Name

PAY NOW

256-bit SSL encrypted

Securely processed by Global Payments

Once complete, the transaction result and receipt will be sent automatically to the customer email address they previously entered in the payment page.

globalpayments   Innovation that delivers.

Support and troubleshooting

For out of balance or missing deposit/fees, please contact:
1-800-263-2970

For technical support with the app, error messaging while processing, or an inability to process transactions, please contact:

ca.ecomsupport@globalpay.com
1-888-366-5110

Frequently asked questions

Will deactivating a product also remove it from my Facebook listing?
No. The listing will not be removed. If any user clicked on the inactive product, a page will display with a message stating that the product is no longer available.

Can we delete products instead of just having them inactive?
(For example: when switching from test to live)
To delete products, please contact the Global Payments Support team:
ca.ecomsupport@globalpay.com and request assistance with Pay by Link product removal.

globalpayments   Innovation that delivers.