

## Use Invoice4U with Pay by Link

### Overview

Invoice4U payment documents will be available in Pay by Link after the service is [activated](#) by Verifone.

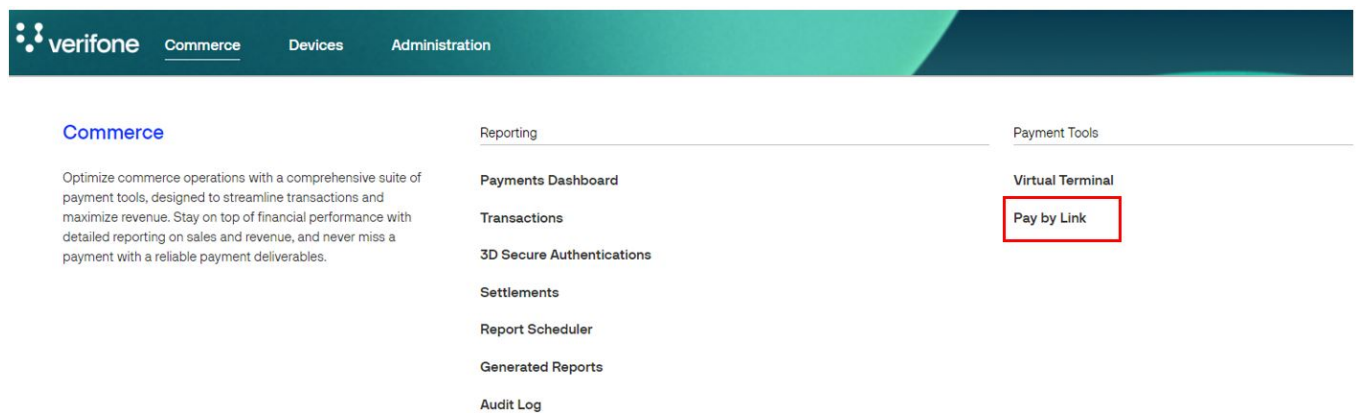
The payment document will be generated automatically after the transaction is captured and will be sent to the shopper's mailbox. For each transaction, the details regarding the payment document will be available in your Verifone Central account.

### Availability

Invoice4U via Pay by Link is available for Merchant Cashier and Merchant Supervisor roles.

### Workflow

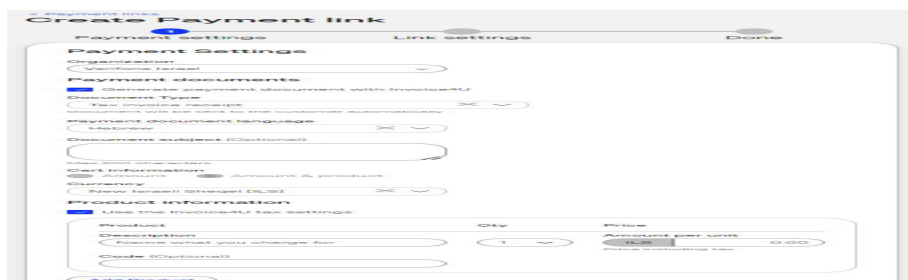
1. Log in to your Verifone Central account. Navigate to **Commerce** > *Payment Tools* > **Pay by Link**.



2. On the *Payment Links* page, click on the **Create Payment Link** button at the top of the page.



### Payment settings

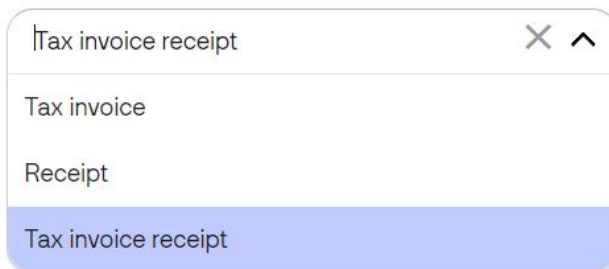


- Select in the *Payment Settings* page your **Organization** information.
- In the *Payment documents* field, check the **Generate payment document with Invoice4U** box, if you want to generate a commercial document for this transaction and select the **Document type**.
  - Tax Invoice
  - Receipt
  - Tax Invoice Receipt

## Payment documents

☒ Generate payment document with Invoice4U

### Document Type



A dropdown menu for selecting the document type. The menu is open, showing a list of options: 'Tax invoice receipt', 'Tax invoice', 'Receipt', and 'Tax invoice receipt'. The 'Tax invoice receipt' option at the bottom is highlighted in blue. The menu has a close button (X) and an up arrow (^) in the top right corner.

The **Receipt** document type does not come with line items.

- Select the **Payment document language** between Hebrew and English.

### Payment document language



A dropdown menu for selecting the payment document language. The menu is open, showing a list of options: 'Hebrew', 'English', and 'Hebrew'. The 'Hebrew' option at the bottom is highlighted in blue. The menu has a close button (X) and an up arrow (^) in the top right corner.

- If the **Tax invoice** or **Tax invoice receipt** are chosen in the **Document type** section, the **Product Information** fields will be displayed.
  - **When using the Invoice4U tax settings** - the default tax settings set in your Invoice4U account will be applied to your products. Set the product name (*Description*), quantity (*Qty*), Amount per unit (tax included), and the optional stock keeping unit ID (*Code*). Use the **Add Product** button to add additional product lines.

## Product information

☒ Use the Invoice4U tax settings

Product	Qty	Price
<b>Description</b> <input type="text" value="Name what you charge for"/>	<input type="text" value="1"/>	<b>Amount per unit</b> <div> <input type="text" value="ILS"/> <input type="text" value="0.00"/> </div> <small>Price including tax</small>
<b>Code (Optional)</b> <input type="text"/>		

Add Product

- **Add custom tax** - in addition to setting the product name (Description), quantity (Qty), Amount per unit, and the optional stock keeping unit ID (Code), you can also specify per product line item whether it is **taxable** (with current value of 17%, as per Israeli VAT) or **not** (0% tax rate), by checking the **Amount is taxable** box.

### Product information

☐ Use the Invoice4U tax settings

Product	Qty	Price
<b>Description</b> <input type="text" value="Name what you charge for"/>	<input type="text" value="2"/>	<b>Amount per unit</b> <div> <input type="text" value="ILS"/> <input type="text" value="10.00"/> </div>
<b>Code (Optional)</b> <input type="text"/>		
<input checked="" type="checkbox"/> Amount is taxable (VAT 17%)		

Add Product

Total price (tax included)	
Tax ILS 2.91	
ILS 20.00	

### Product information

☐ Use the Invoice4U tax settings

Product	Qty	Price
<b>Description</b> <input type="text" value="Name what you charge for"/>	<input type="text" value="2"/>	<b>Amount per unit</b> <div> <input type="text" value="ILS"/> <input type="text" value="10.00"/> </div>
<b>Code (Optional)</b> <input type="text"/>		
<input type="checkbox"/> Amount is taxable (VAT 17%)		

Add Product

Total price (tax included)	
Tax ILS 0.00	
ILS 20.00	

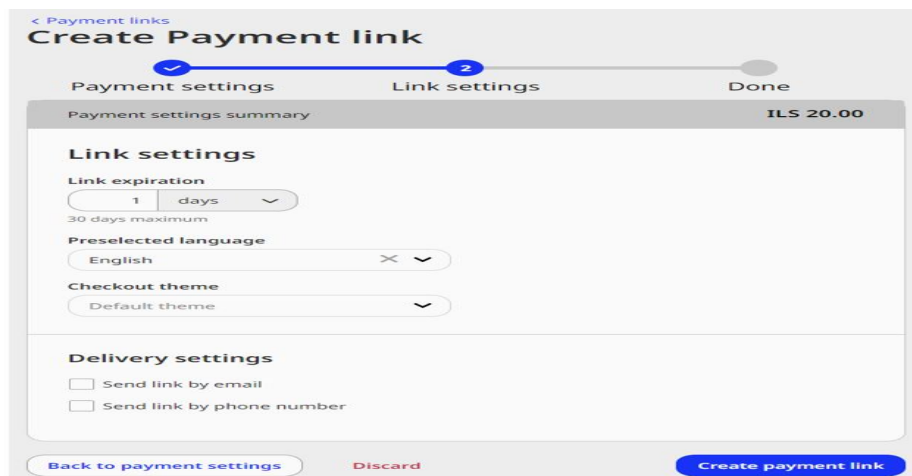
- (optional) Add the **Merchant Reference** to identify the transaction or link this transaction to an order ID generated by your own inventory system.
- Select the available **Payment methods**. If you want to perform a sale transaction (authorization + capture), check the **Automatically send transaction for capture** checkbox. If you leave the *Automatically send transaction for capture* checkbox unchecked, you have to manually perform the authorization and the capture. Refer to the table below for more information:

<b>PRE-AUTHORIZATION</b>	A pre-authorization reserves funds for authorization on customer's account or card, to ensure that the shopper will be able to pay when the invoice is due.
<b>AUTHORIZATION</b>	An authorization transaction puts funds on hold. An AUTHORISATION refers to funds on hold which cannot be adjusted - also referred to as a final authorization.
<b>CAPTURE</b>	A capture of funds for a final authorization. The money is withdrawn from the customer's account.
<b>SALE</b>	<p>A single step transaction which is automatically captured. This can be thought of as an authorization and capture combined.</p> <p>This is often also referred to as a "purchase" transaction in some regions. You can opt for the <b>Authorization + Capture (Sale)</b> step for subscriptions, digital goods, etc.</p> <p><b>Note:</b> As a merchant, you might prefer to choose <b>Authorization</b> and <b>Capture</b> separately if you are unsure of the availability of your products in stock.</p>

- Go to the **Customer Details** section and fill in the specific information (first name/last name/ email address - used to send the payment document).

Once the payment settings have been completed, click on **Continue to link settings** to proceed.

## Link settings screen



- Set the **Link Expiration** time to choose for how long a payment link should remain valid. The maximum is 30 days from the time you created the link. Once expired, the customer cannot access the payment link.
- Choose the **Preselected language** used in the checkout interface.
- Set a **Checkout theme** of your choice to personalize the Pay by Link checkout page. The *Default* theme can be chosen (the template theme provided by Verifone) or a customized theme can be created via the [Checkout Themes editor](#).
- (optional) If you want to send the link directly to the customer using one of the methods provided, you can check **Send link by email** or **Send link by phone number** or both.

Once the configuration has been completed, click on **Create payment link** to proceed.

You can always edit the previous payment configuration, by selecting the **Back to payment settings** button.

## Done screen

< Payment links

### Create Payment link

✓

✓

3

Payment settings
Link settings
Done

✓

#### Payment link was successfully created

<https://cst.checkout.vficloud.net/v2/checkout/f7dca35f-d205-47...>

📄 Copy link

Expires on 3 May 2023 12:01

Send payment link

#### Link details

Organization	Verifone Israel
Transaction amount	ILS 20
Merchant Reference	DefaultMerch
Product(s)	test
Customer name	Test Test1

Return to payment links

A confirmation screen will be displayed.

The payment link can be copied to clipboard, by pressing the **Copy link** button or can be send by email or SMS, by selecting **Send payment link**.

To share the link with your customer, follow the steps from the [Sharing the Payment Link](#) section, in the [Creating a Payment Link](#) documentation.