



Square Payment Links

Megan De Freitas - 2024-12-03 - Extended Modules

Overview

Square payment link functionality has been added to SalesPad as of version 5.4.14. This allows users to generate and send Square payment links to customers for their sales orders. The customer can complete their purchase by following the payment link to a Square checkout page, where they can enter their payment information into Square's secure webpage. Once their checkout steps are completed, the payment information is retrieved by SalesPad and used to create a corresponding payment for that sales order.

Review the [Get Started with Square Payment Links](#) guide for more information.

Configuration

This guide is for configuring Square payment links. Please review the [Square Integration](#) documentation for general Square configuration in SalesPad.

Security Editor

Sales Document Payments

Open the Security Editor in SalesPad and filter to "sales document payments". Set the Allow Payment Links sub-security to true and save all changes. Log off and back into SalesPad for the changes to take effect.

Security

Select All
 Select None

Acce...	Name
<input type="checkbox"/>	sales document payments
<input checked="" type="checkbox"/>	Sales Document Payments*

Sales Document Payments

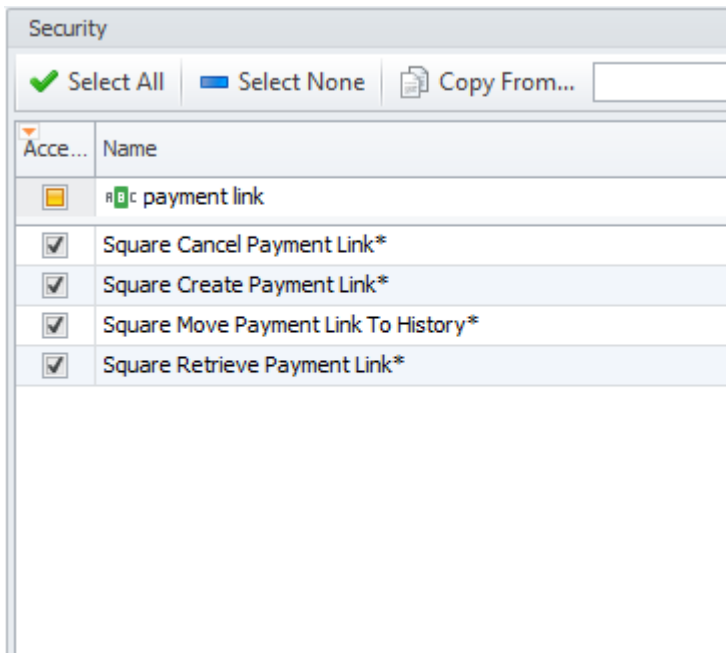
Misc	
Allow Authorization Deposits	False
Allow Authorize	False
Allow Charge	False
Allow Decrypted Credit Card Lookup	False
Allow Manual	False
Allow Payments on Restricted Queues	False
Allow Remove Cash/Check Payments	True
Allow Remove Manual Payments	True
Allowed Payment Options	Payments
Auto Reduce Cash Payment	False
Available Processors	*
Can Edit Manual Payments	True
Default Checkbook ID	
Enable Cash/Check Payments	True
Enable Credit Card Payments	True
PayFabric	
Allow PayLinks	False
Can Change PayFabric Card After Authorization	False
Default On Account When Capturing PayFabric Authorizations	False
Enable Manual Card Selection in PayFabric plugin	False
Enable PayFabric Payments	True
Scripts	
Cash/Check Pre-Save Script	
Square	
Allow Payment Links	True
Enable Square Payments	True

Misc

Sales Document Entry Plugins

Open the Security Editor and filter to “payment link” to review securities for the following Sales Document Entry plugins:

- Square Create Payment Link
- Square Retrieve Payment Link
- Square Cancel Payment Link
- Square Move Payment Link To History



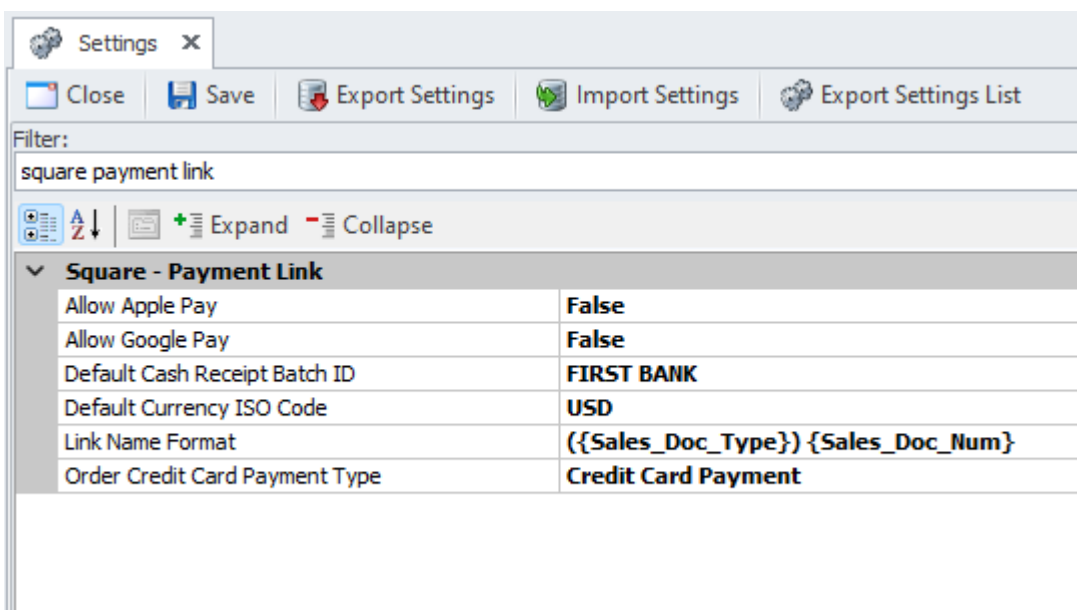
These plugins can be configured to run automatically in workflow, so each plugin also has a Failed Transaction Queue sub-security. Documents that fail plugin processing when forwarding through workflow will be moved to this queue for review.

The Square Move Payment Link To History plugin has a Can Move Links Awaiting Payment sub-security. When enabled, payment links can be moved to history even if they are still awaiting payment.

Make sure the desired plugins are enabled, save your changes, and log off and back into SalesPad for the changes to take effect.

Settings

Open Settings in SalesPad and filter to "Square payment link" to review payment link settings:



Allow Apple Pay - Indicates whether Apple Pay is accepted at checkout. Defaults to false.

Allow Google Pay - Indicates whether Google Pay is accepted at checkout. Defaults to false.

Default Cash Receipt Batch ID - Default Batch ID to be used when creating a cash receipt through the Square payment link.

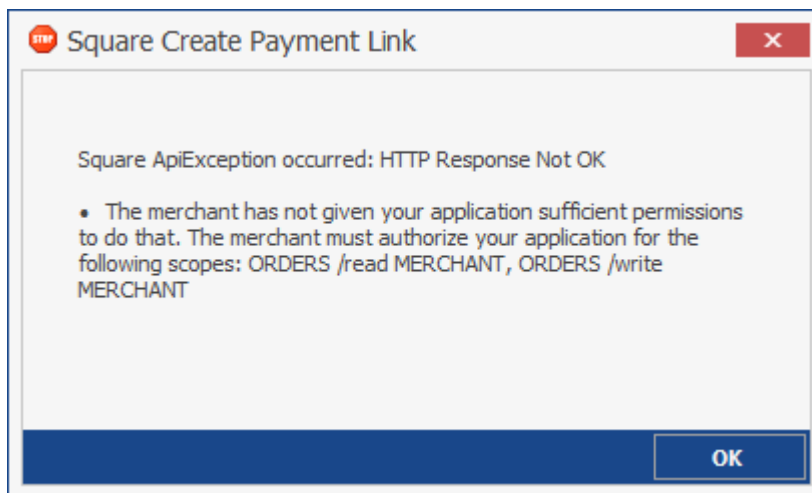
Default Currency ISO Code - Default ISO Code sent if the document currency is not found. Defaults to USD.

Link Name Format - Format of the link name that will be displayed to the end-user. Defaults to ({Sales_Doc_Type}) {Sales_Doc_Num}.

Order Credit Card Payment Type - The payment type to use for payment link credit card payments for sales orders. Defaults to Credit Card Payment.

Square Authorization

Square payment links require ORDERS_READ and ORDERS_WRITE permissions. It may be necessary to grant access by requesting a new access token in the application settings. If these permissions are not granted, an insufficient permissions error message will appear:



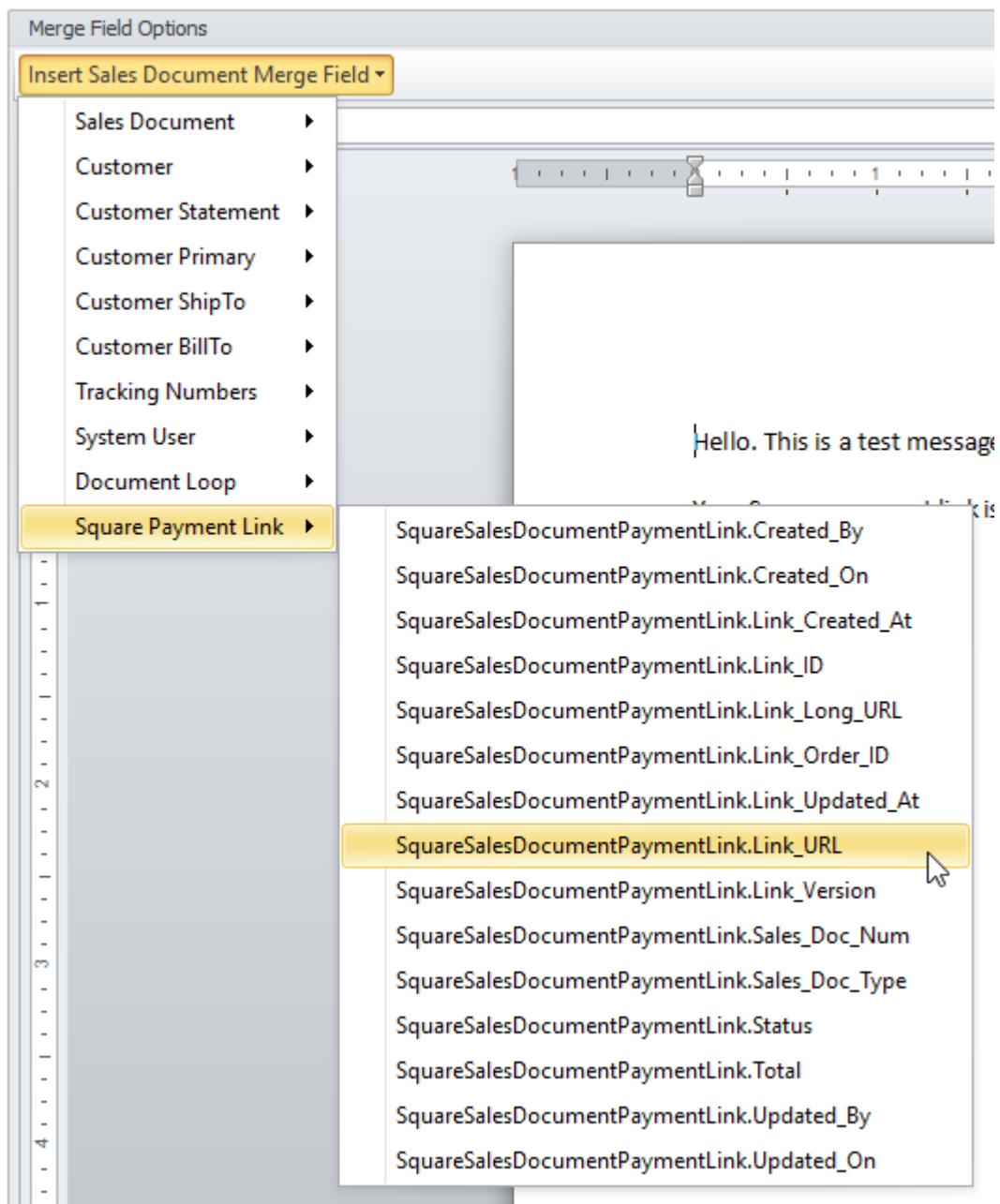
Sending Payment Links

Square currently does not handle automatic emailing of payment links. SalesPad must be configured to send Square payment links using the Email Template Editor and Smart Printing Maintenance.

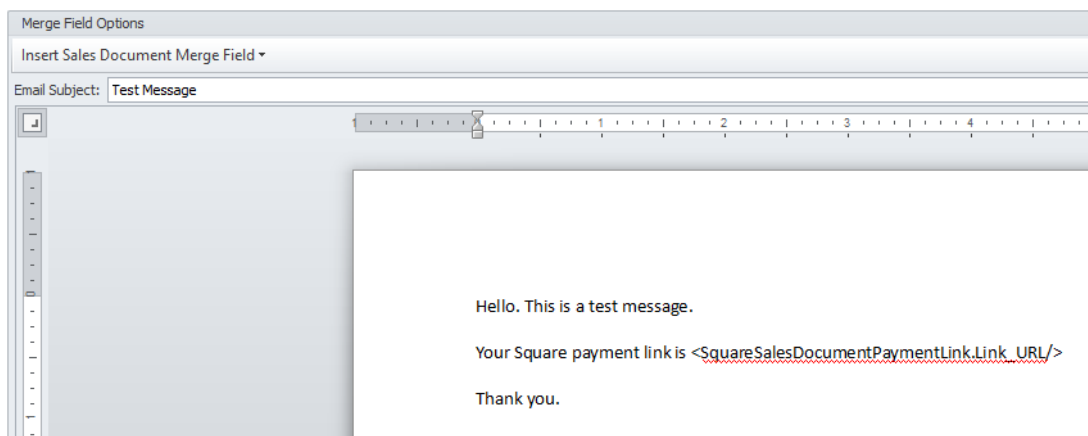
Email Template Editor

Open the [Email Template Editor](#) screen in SalesPad and create a new sales document email template or select an existing sales document email template.

Click the Insert Sales Document Merge Field dropdown button, select the Square Payment Link option, and select the Link_URL or Link_Long_URL field to add to the template.



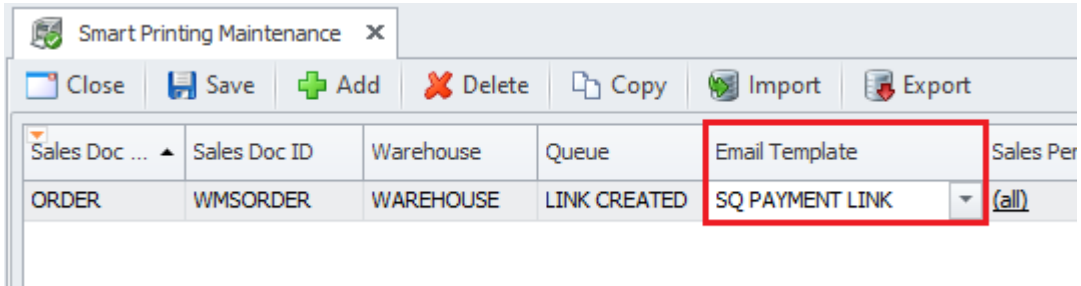
Once the field has been added, it will appear in the template:



Save all changes and close the Email Template Editor.

Smart Printing Maintenance

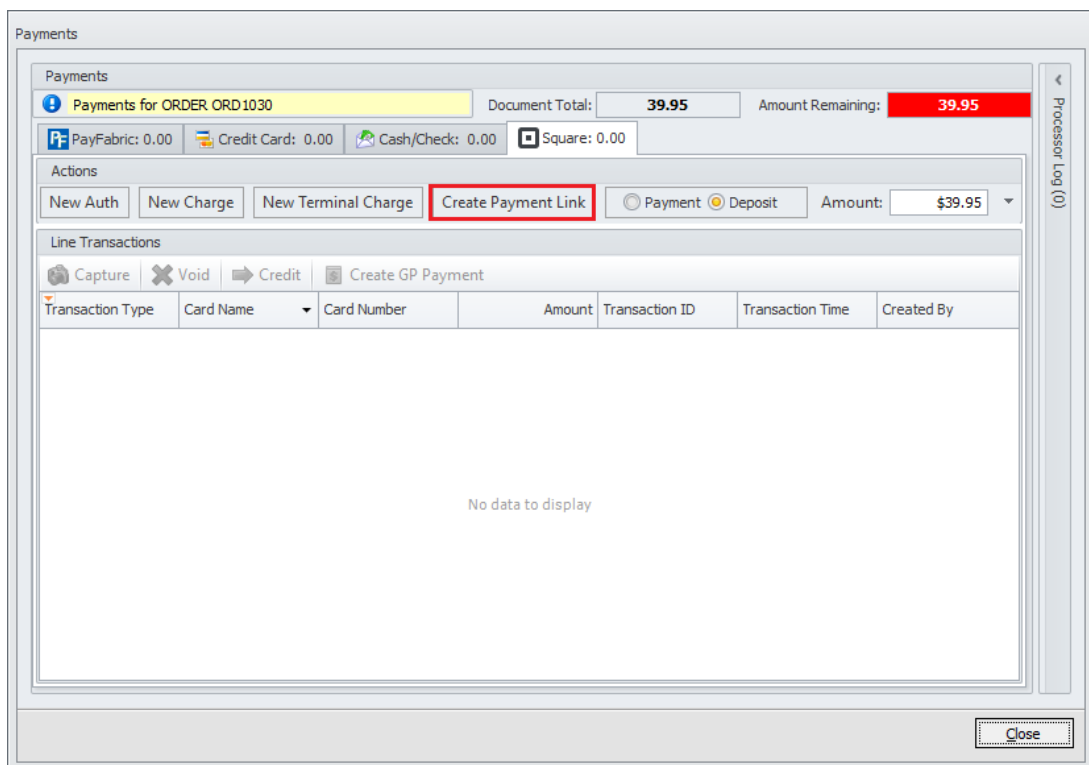
Open the [Smart Printing Maintenance](#) screen in SalesPad and create a new configuration or modify an existing configuration. In the Email Template dropdown, select the email template that was configured in the previous step. Save all changes and close Smart Printing Maintenance.



Processing Payment Links

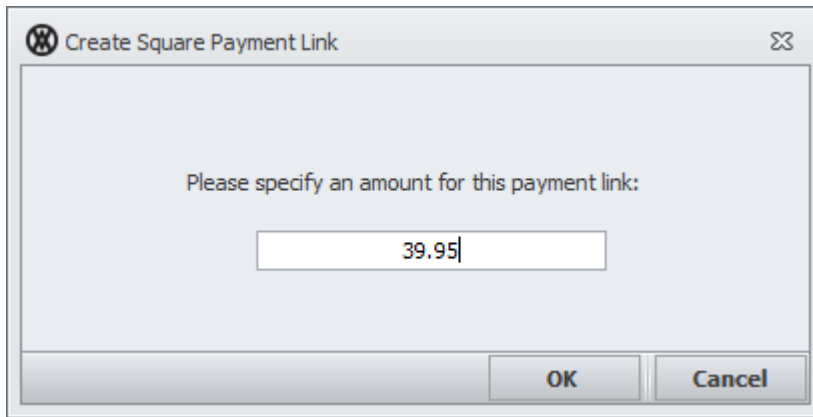
Payment Entry Link Creation and Retrieval

In Sales Document Entry, open the Payments window by clicking the Accept Payment button. Switch to the Square tab if needed, then click the Create Payment Link button to create a new payment link for this sales document.



NOTE: Only one payment link can be created for a sales document at a time.

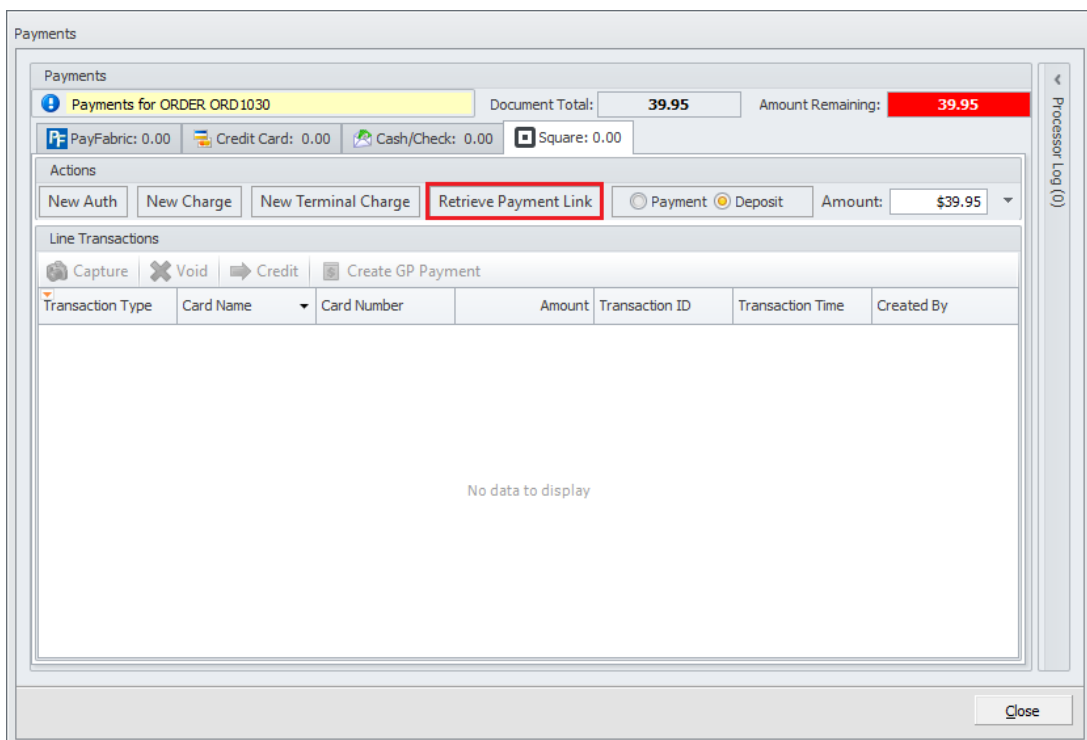
A prompt will request the amount for the payment link:



The dialog box is titled "Create Square Payment Link" and contains the text "Please specify an amount for this payment link:". Below the text is a text input field containing the value "39.95". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Enter the desired amount and click OK to create the link.

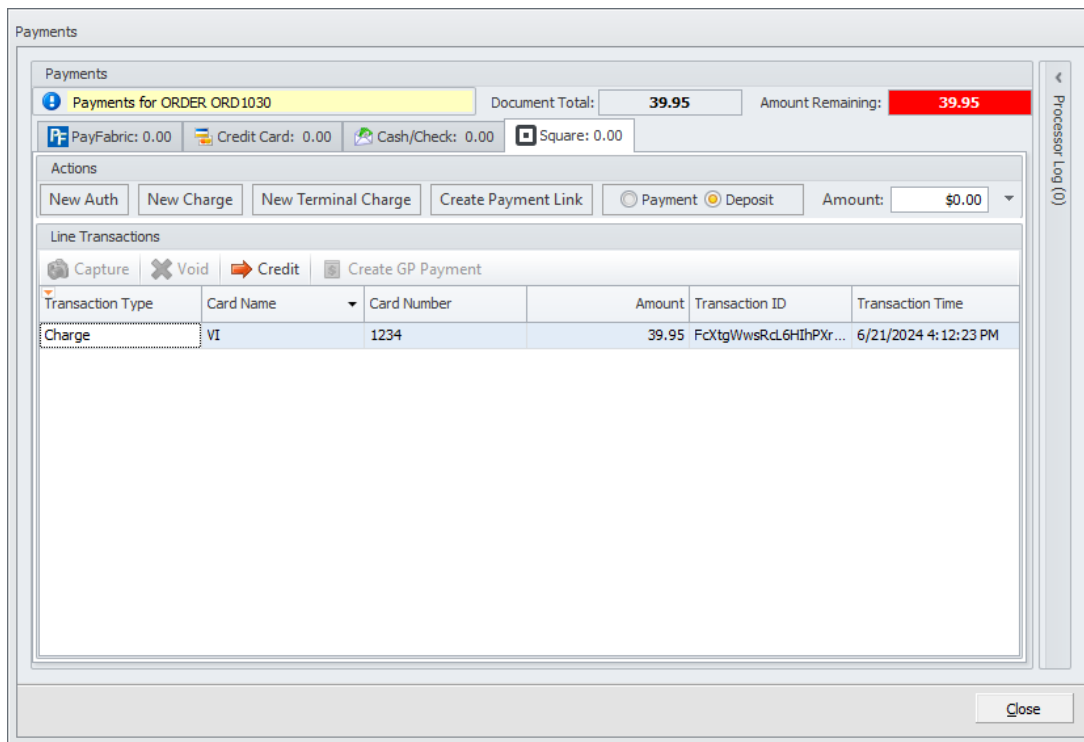
Click the Retrieve Payment Link button to retrieve the payment information associated with the payment link.



The screenshot shows the "Payments" window. At the top, it displays "Payments for ORDER ORD1030" with a "Document Total" of 39.95 and "Amount Remaining" of 39.95. Below this, there are payment method buttons: PayFabric (0.00), Credit Card (0.00), Cash/Check (0.00), and Square (0.00). The "Actions" section includes buttons for "New Auth", "New Charge", "New Terminal Charge", "Retrieve Payment Link" (highlighted with a red box), "Payment", and "Deposit". An "Amount" dropdown is set to "\$39.95". The "Line Transactions" section has buttons for "Capture", "Void", "Credit", and "Create GP Payment". Below this is a table with columns: Transaction Type, Card Name, Card Number, Amount, Transaction ID, Transaction Time, and Created By. The table is currently empty, displaying "No data to display". A "Close" button is located at the bottom right of the window.

NOTE: Payment links that are still awaiting payment cannot be retrieved.

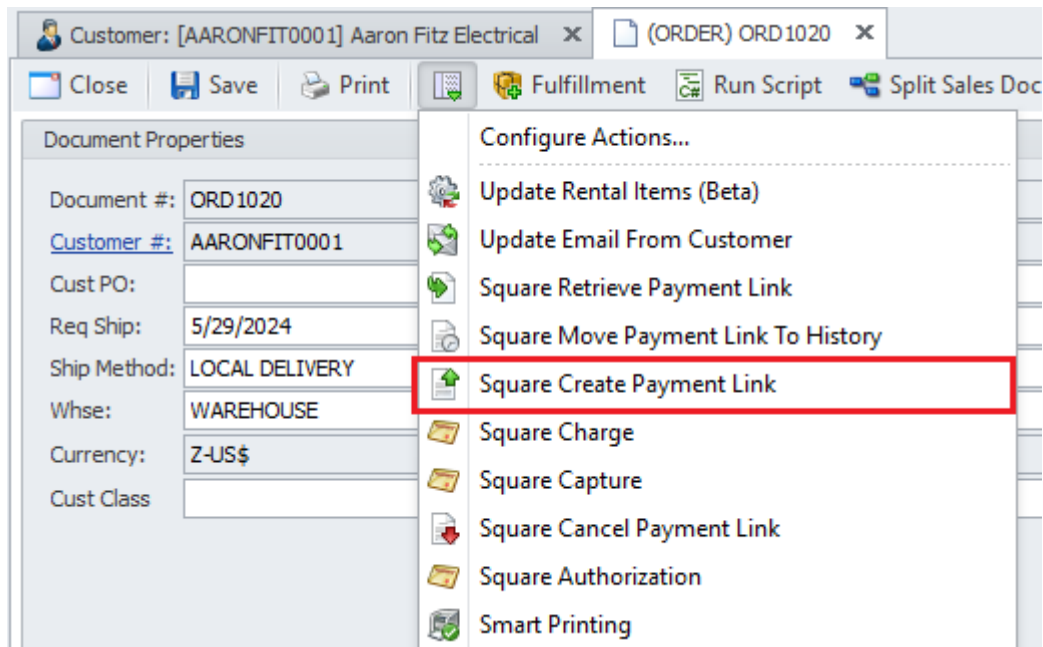
Once the payment link is retrieved successfully, the payment will be automatically applied to the sales document, and the payment link information will be sent to history.



Sales Document Entry Plugins

Create Payment Link

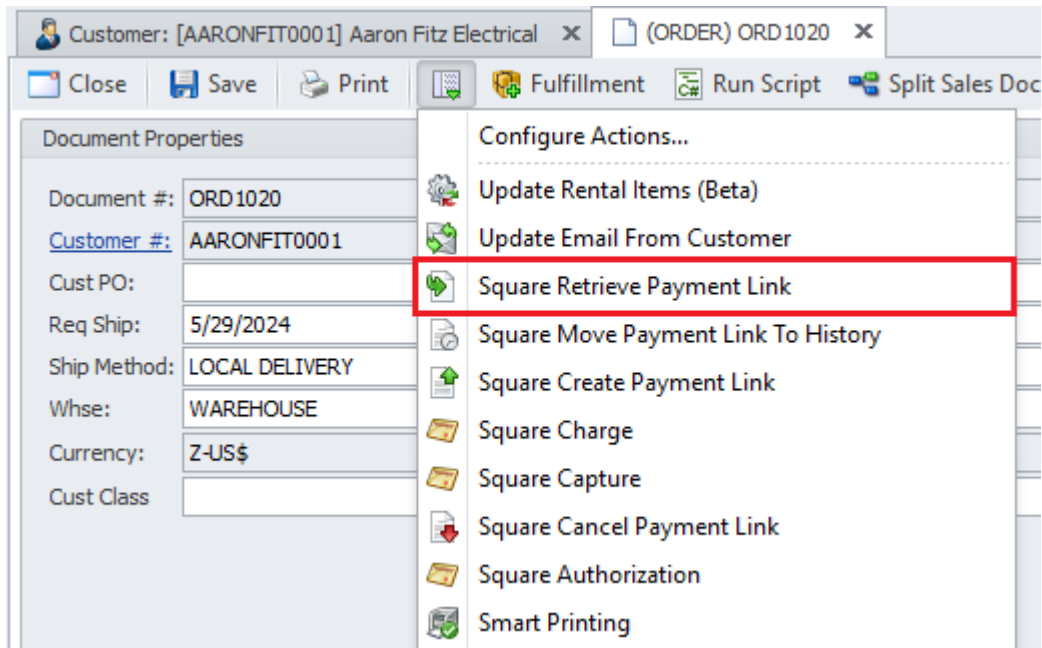
The Square Create Payment Link plugin creates a new payment link for the sales document. Simply select the Square Create Payment Link plugin in Sales Document Entry. SalesPad will display a notification for whether the payment link creation was successful.



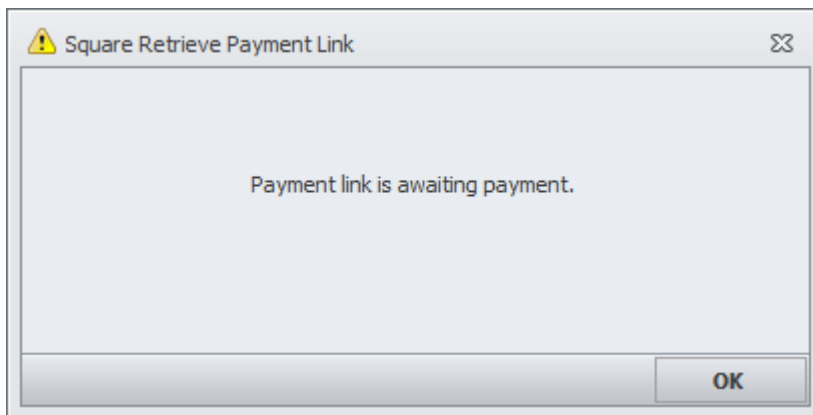
Retrieve Payment Link

The Square Retrieve Payment Link plugin retrieves the payment link information for the sales document from Square, which will update the sales document with payment information if the payment link has been paid. To manually retrieve an existing sales document payment link, select the Square Retrieve Payment Link plugin in Sales Document

Entry. SalesPad will display a notification for whether the payment link retrieval was successful.

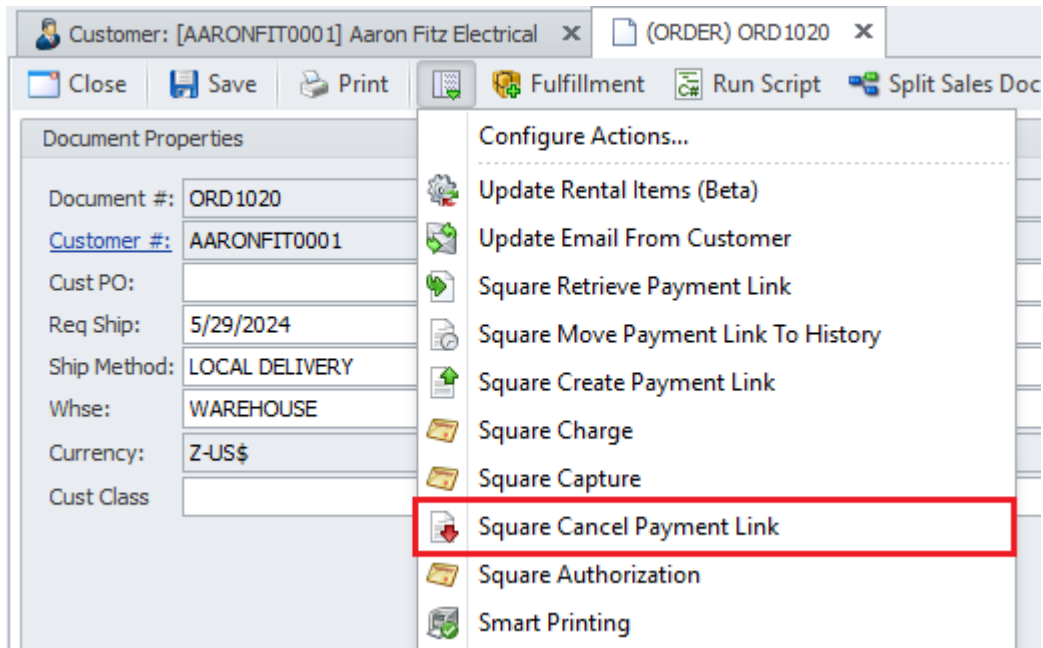


Note: Payment links that are still pending will notify that they are awaiting payment.



Cancel Payment Link

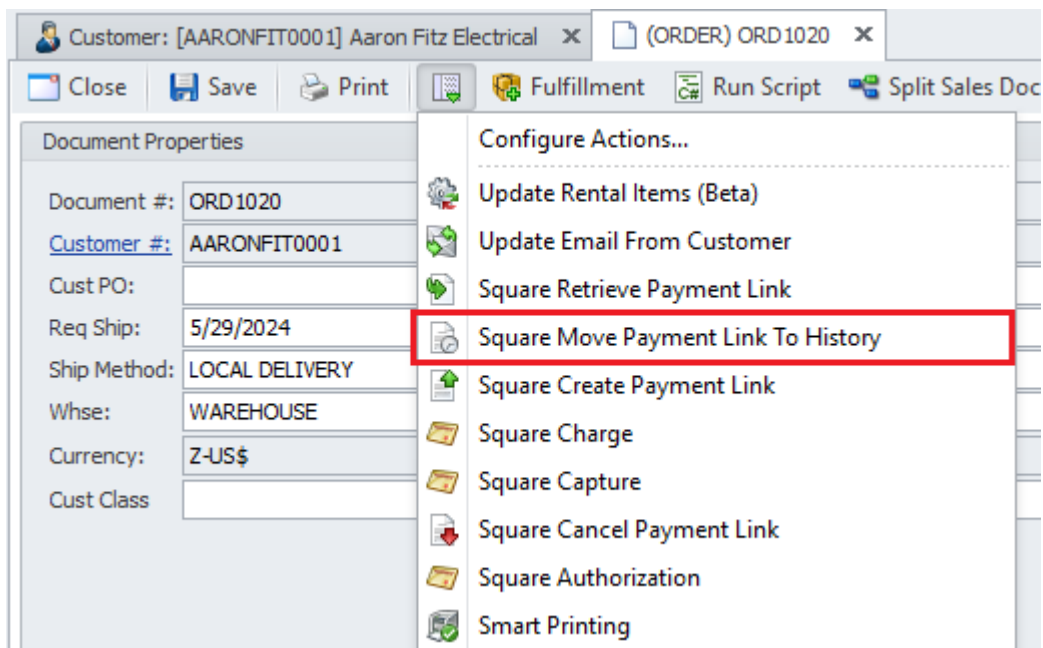
The Square Cancel Payment Link plugin cancels the existing payment link for the sales document. Simply select the Square Cancel Payment Link plugin in Sales Document Entry. SalesPad will display a notification for whether the payment link cancellation was successful.



Move Payment Link To History

The Square Move Payment Link To History plugin manually moves payment link information from the open spSquareSalesDocumentPaymentLink table to the historical spSquareSalesDocumentPaymentLinkHistory table and sets the status as Completed.

Simply select the Square Move Payment Link To History plugin in Sales Document Entry. SalesPad will display a notification for whether the payment link update was successful.



IMPORTANT: Upon successful completion, the Square Retrieve Payment Link and Square Cancel Payment Link plugins will automatically move the payment link to history with the Completed or Canceled status respectively. There is no need to use this plugin unless you cannot complete or cancel an existing payment link and need to create a new one.

Square Checkout

When a customer follows the payment link, they will be greeted with a Square checkout page:

i This is a preview link. Payment options are displayed for visual purpose only and may differ on the actual production link.

(ORDER) ORD1020
\$124.00

ORDER SUMMARY (1 ITEM) ▼

Subtotal	\$124.00
Order total	\$124.00

CONTACT

+1 United States ▼	Phone number
Email address for receipt	
First name	Last name

This displays the total amount due for the sales document, and it provides checkout fields for the customer to fill out. Once the customer completes the payment, the payment link information can be retrieved in SalesPad.

Workflow

The Square payment link plugins can also be triggered automatically in the sales document workflow. Open the [Sales Document Workflow Setup](#) screen in SalesPad and select the document type and ID. For the queue where the action should be triggered, select the desired Square payment link plugin from the Plugin dropdown menu. Make sure to save all changes.

Sales Document Types		Workflow Queues							
Doc. Type	Doc. ID	Seq	Queue	Button Caption	Print?	Plugin	Eval	Force	Next Queue(s)
ORDER	WMSORDER		LINK						
		130	CREATE LINK	Create Link	<input type="checkbox"/>	Square Create Payment Link	<input type="checkbox"/>	<input type="checkbox"/>	LINK CREATED
		140	LINK CREATED	Send Link	<input type="checkbox"/>	Smart Printing	<input type="checkbox"/>	<input type="checkbox"/>	LINK SENT
		150	LINK SENT	Retrieve Link	<input type="checkbox"/>	Square Retrieve Payment Link	<input type="checkbox"/>	<input type="checkbox"/>	LINK RETRIEVED
		160	LINK RETRIEVED		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
		170	CANCEL LINK	Cancel Link	<input type="checkbox"/>	Square Cancel Payment Link	<input type="checkbox"/>	<input type="checkbox"/>	LINK CANCELED
		180	LINK CANCELED		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
		190	RETRIEVE LINK	Retrieve Link	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	LINK RETRIEVED

Automation Agent

Automation Agent has a Square Payment Link job that can be configured to retrieve payment link information from Square automatically on a set schedule.

Open the Automation Lookup screen (requires the [Automation Agent](#) DLL) in SalesPad and click the New Automation button. Select the Square Payment Link platform and click OK to create the job.

New Automation Instance

Automation Name:

Platform:

Description:

The following settings can be configured for the Square Payment Link job:

Square Payment Link Test

Refresh Save Configure Run Options Set Automation Schedule

Automation

Automation Name: Square Payment Link Test

Platform: Square Payment Link

Description:

Action Center Settings Audit Retrieve Payment Link

Export Import

Filter:

Expand Collapse

Misc		
Action Center Result Group Count		1
Retrieve Payment Link		
Audit Awaiting Payment Message		False
Batches		ORDER WMSORDER RETRIEVE LINK
Payment Wait Duration		30
Process Historical Invoices		True
Send To Batch On Fail		REVIEW
Send Email On Error		
Email Errors		False
Email Errors From		
Email Errors To		
Error Email Outgoing Name		Automation Agent
Serialization		
Serialize Errors		True
Serialize Internal and External Pairs		True
Successful Automation History		
Days to Keep Successful Automation History Logs		30
Unsuccessful Automation History		
Days to Keep Unsuccessful Automation History Logs		30

Audit Awaiting Payment Message - When enabled, the awaiting payment message will be logged to the sales document audit log. Do not enable this setting if the payment link job is running frequently to avoid unnecessary sales document audit entries. Defaults to false.

Batches - Semicolon-delimited list of sales document batches that this task will process. Leave blank to not process open sales documents.

Payment Wait Duration - Duration in days until payment links still awaiting payment are logged to the Action Center. Set to -1 for an unlimited number of days. Defaults to 30 days.

Process Historical Invoices - When enabled, historical invoices with payment links will be processed. Defaults to false.

Send To Batch On Fail - Name of the batch to move open sales documents into when the payment link cannot be retrieved. Leave blank to not move failed sales documents.

Note: After payment links are successfully retrieved by the Square Payment Link job, open sales documents will be automatically forwarded through the workflow.