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Square Payment Links

Megan De Freitas - 2025-06-12 - [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
Copy From...

Search

Acce...
Name

sales document payments

Sales Document Payments*

x

☒

Name
Contains
sales document payments

v

Sales Document Payments

v
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

v
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

v
Scripts

Cash/Check Pre-Save Script	
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v
Square

Allow Payment Links	True
Enable Square Payments	True

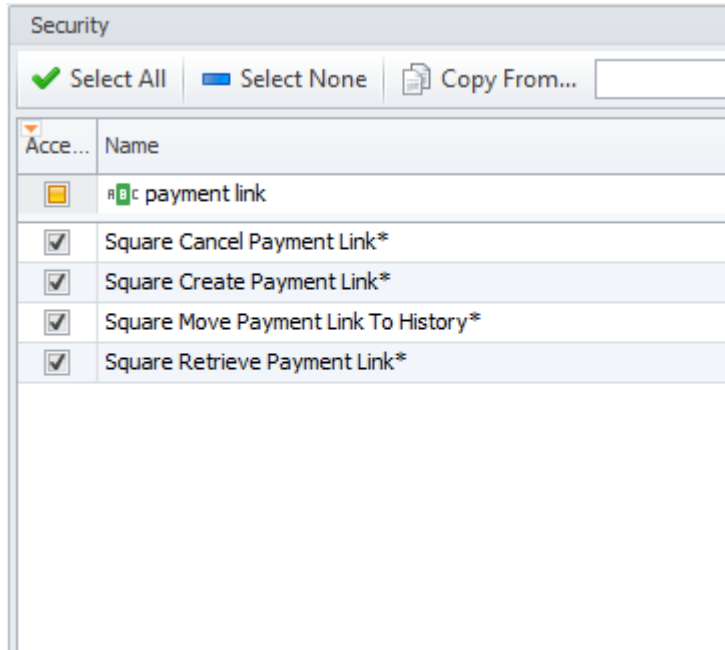
Misc

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



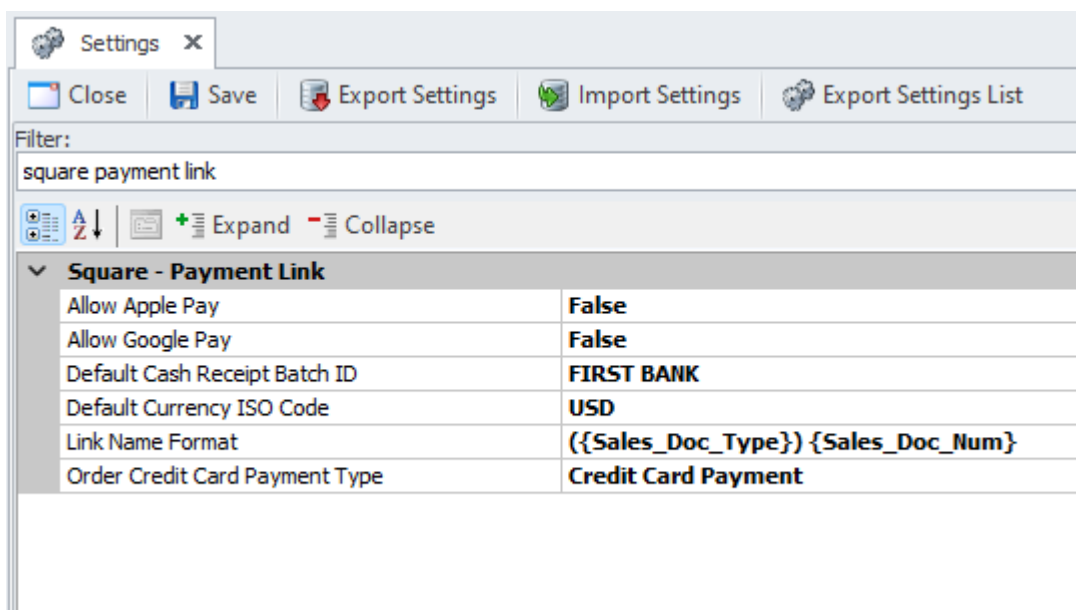
These plugins can be configured to run automatically in workflow, so each plugin also has a Failed Transaction Queue sub-security. Documents that fail plugin processing when forwarding through workflow will be moved to this queue for review.

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.

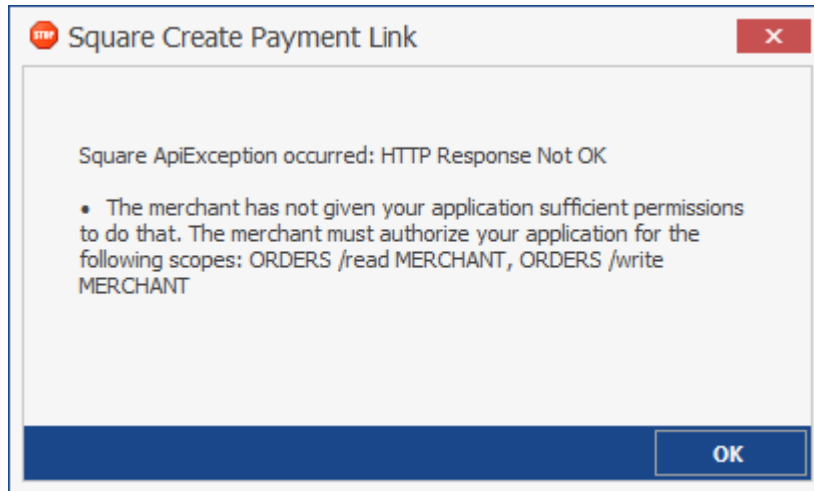
Default Currency ISO Code - Default ISO Code sent if the document currency is not found. Defaults to USD.

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:



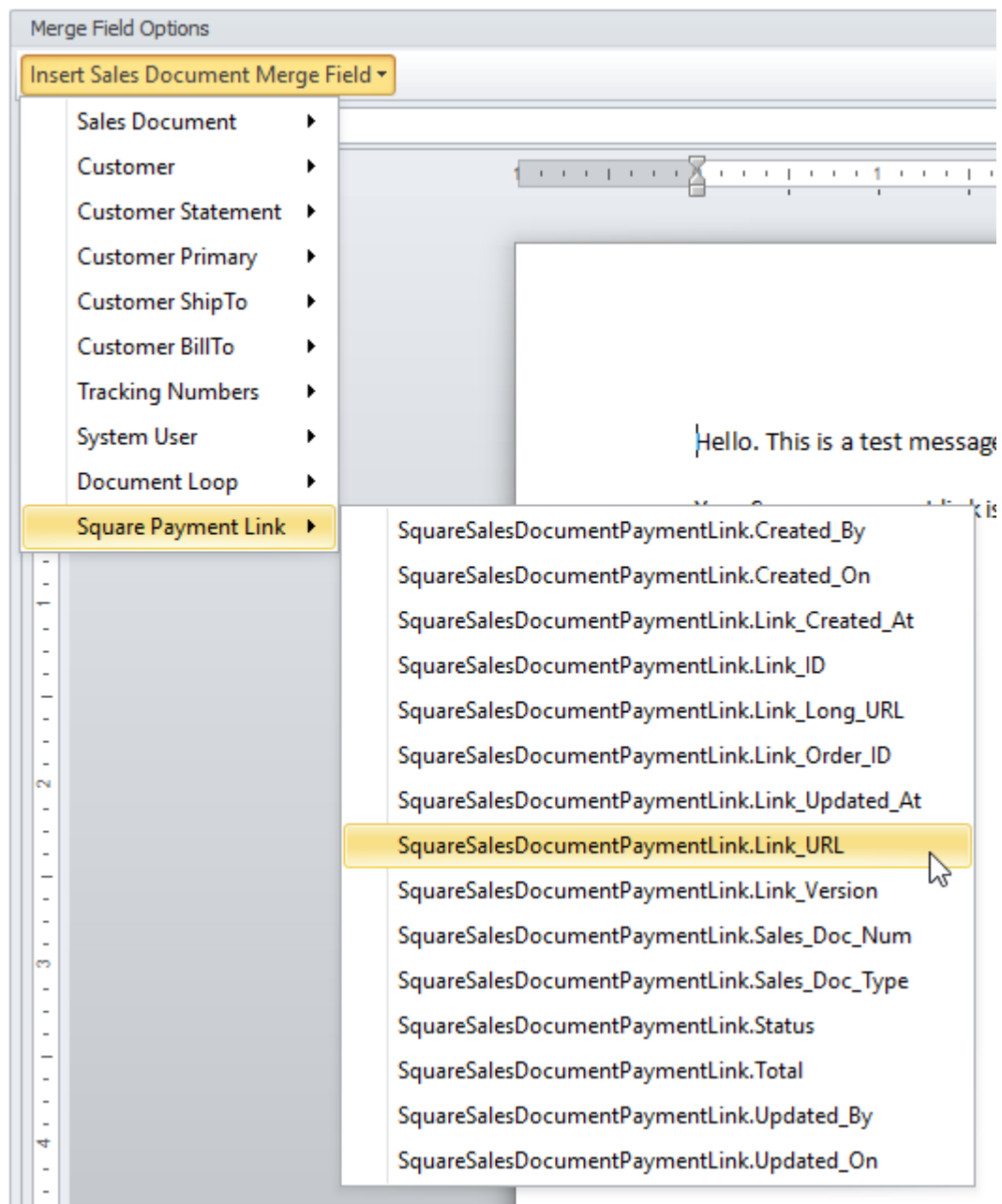
Sending Payment Links

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.

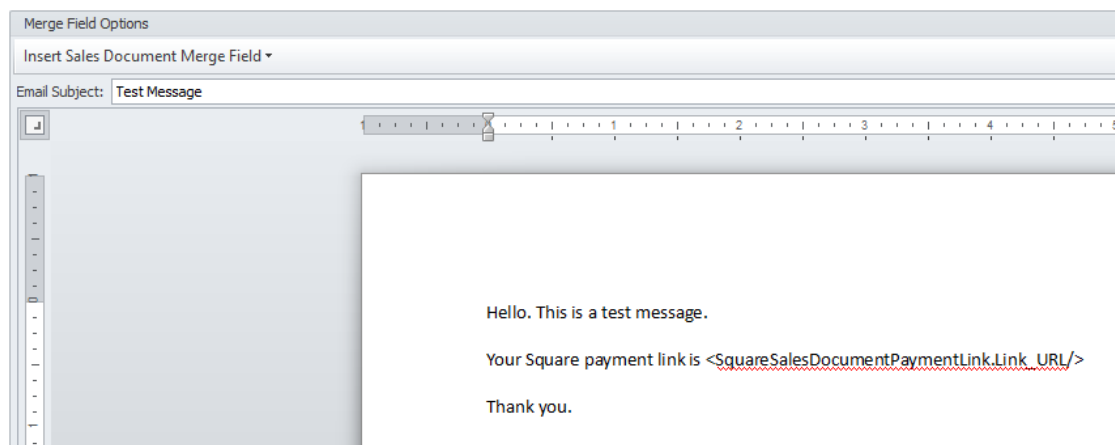
Email Template Editor

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.



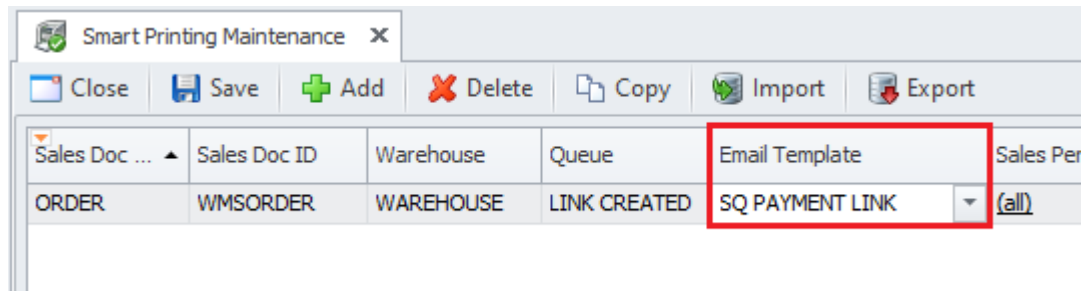
Once the field has been added, it will appear in the template:



Save all changes and close the Email Template Editor.

Smart Printing Maintenance

Open the [Smart Printing](#) 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.



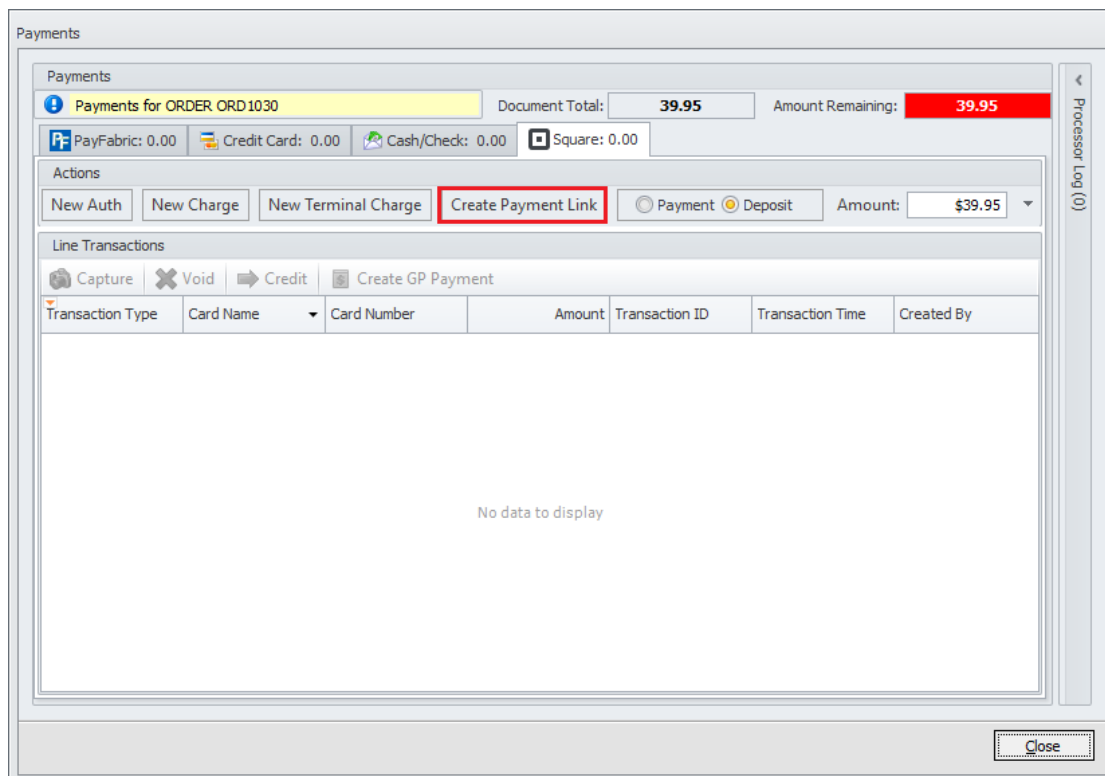
The image shows the 'Smart Printing Maintenance' window. It has a title bar with a close button. Below the title bar is a menu bar with buttons: Close, Save, Add, Delete, Copy, Import, and Export. Below the menu bar is a table with columns: Sales Doc ID, Warehouse, Queue, Email Template, and Sales Per. The first row of data shows 'ORDER', 'WMSORDER', 'WAREHOUSE', 'LINK CREATED', 'SQ PAYMENT LINK', and '(all)'. The 'Email Template' column is highlighted with a red box.

Sales Doc ID	Warehouse	Queue	Email Template	Sales Per	
ORDER	WMSORDER	WAREHOUSE	LINK CREATED	SQ PAYMENT LINK	(all)

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.

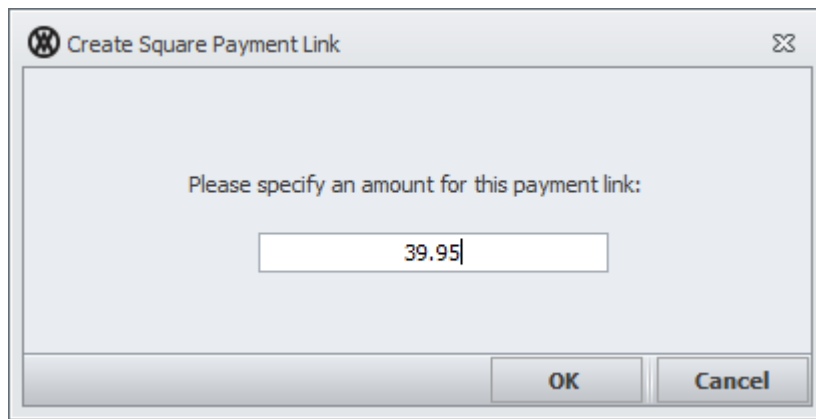


The image shows the 'Payments' window. It has a title bar with the text 'Payments'. Below the title bar is a section for 'Payments for ORDER ORD1030'. It shows 'Document Total: 39.95' and 'Amount Remaining: 39.95'. Below this is a section for 'Actions' with buttons: New Auth, New Charge, New Terminal Charge, Create Payment Link, Payment, and Deposit. The 'Create Payment Link' button is highlighted with a red box. Below the 'Actions' section is a section for 'Line Transactions' with buttons: 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 empty and shows 'No data to display'. At the bottom right is a 'Close' button.

Transaction Type	Card Name	Card Number	Amount	Transaction ID	Transaction Time	Created By
No data to display						

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

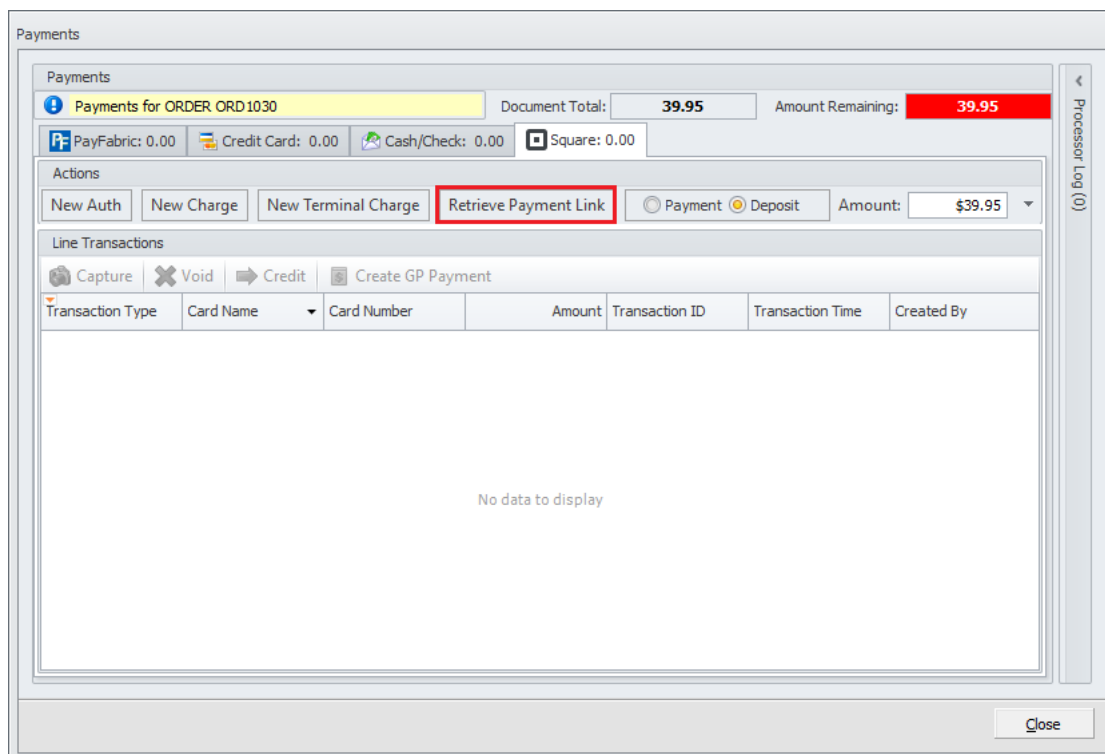
A prompt will request the amount for the payment link:



A dialog box titled "Create Square Payment Link" with a close button in the top right corner. The main text says "Please specify an amount for this payment link:". Below this is a text input field containing "39.95". At the bottom are "OK" and "Cancel" buttons.

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 "Payments" window displays payment information for "ORD1030". It shows a "Document Total" of 39.95 and an "Amount Remaining" of 39.95. Payment methods listed include PayFabric (0.00), Credit Card (0.00), Cash/Check (0.00), and Square (0.00). The "Actions" section contains 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". Below is a "Line Transactions" section with a table header: 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 at the bottom right.

Transaction Type	Card Name	Card Number	Amount	Transaction ID	Transaction Time	Created By
No data to display						

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.

Payments

Payments for ORDER ORD1030 Document Total: **39.95** Amount Remaining: **39.95**

PayFabric: 0.00 Credit Card: 0.00 Cash/Check: 0.00 Square: 0.00

Actions: New Auth New Charge New Terminal Charge Create Payment Link Payment Deposit Amount: \$0.00

Line Transactions

Capture Void Credit Create GP Payment

Transaction Type	Card Name	Card Number	Amount	Transaction ID	Transaction Time
Charge	VI	1234	39.95	FcXtgWwsRcL6HhPxr...	6/21/2024 4:12:23 PM

Close

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.

Customer: [AARONFIT0001] Aaron Fitz Electrical (ORDER) ORD1020

Close Save Print Fulfillment Run Script Split Sales Doc

Document Properties

Document #: ORD1020

Customer #: AARONFIT0001

Cust PO:

Req Ship: 5/29/2024

Ship Method: LOCAL DELIVERY

Whse: WAREHOUSE

Currency: Z-US\$

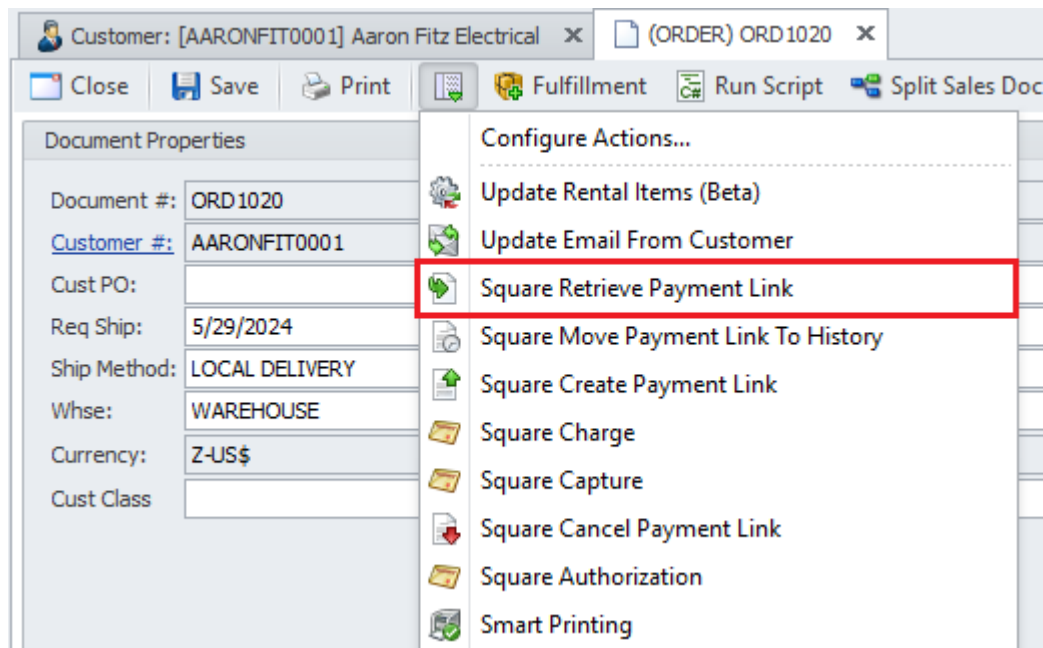
Cust Class

Configure Actions...

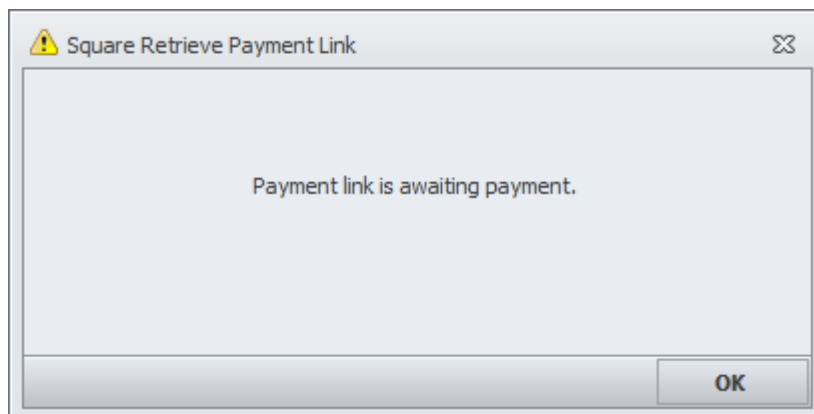
- Update Rental Items (Beta)
- Update Email From Customer
- Square Retrieve Payment Link
- Square Move Payment Link To History
- Square Create Payment Link**
- Square Charge
- Square Capture
- Square Cancel Payment Link
- Square Authorization
- Smart Printing

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.

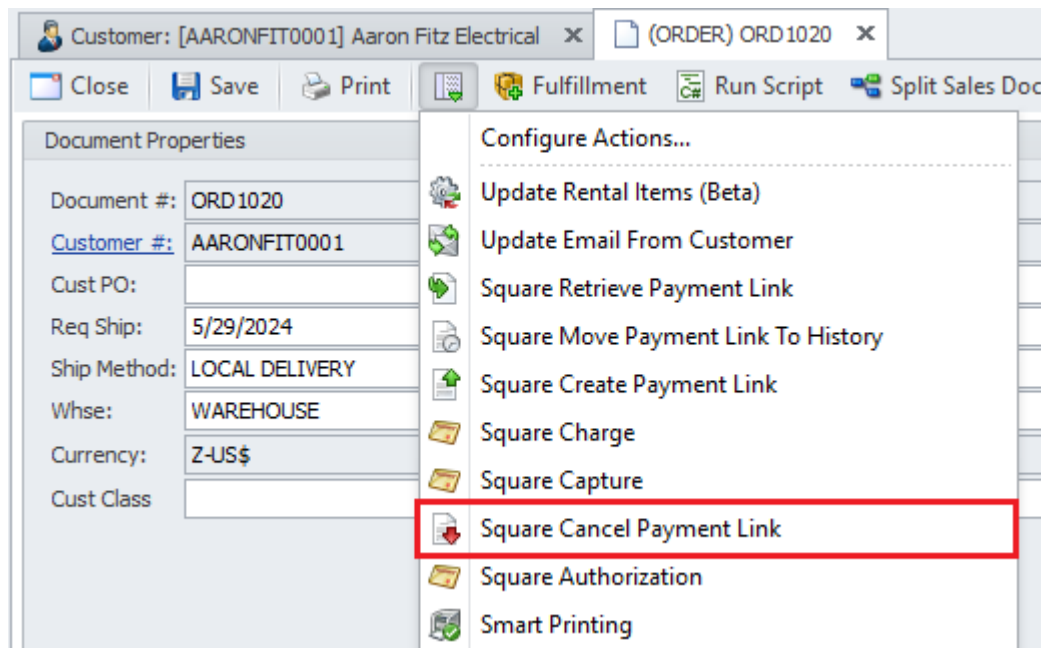


Note: Payment links that are still pending will notify that they are awaiting payment.



Cancel Payment Link

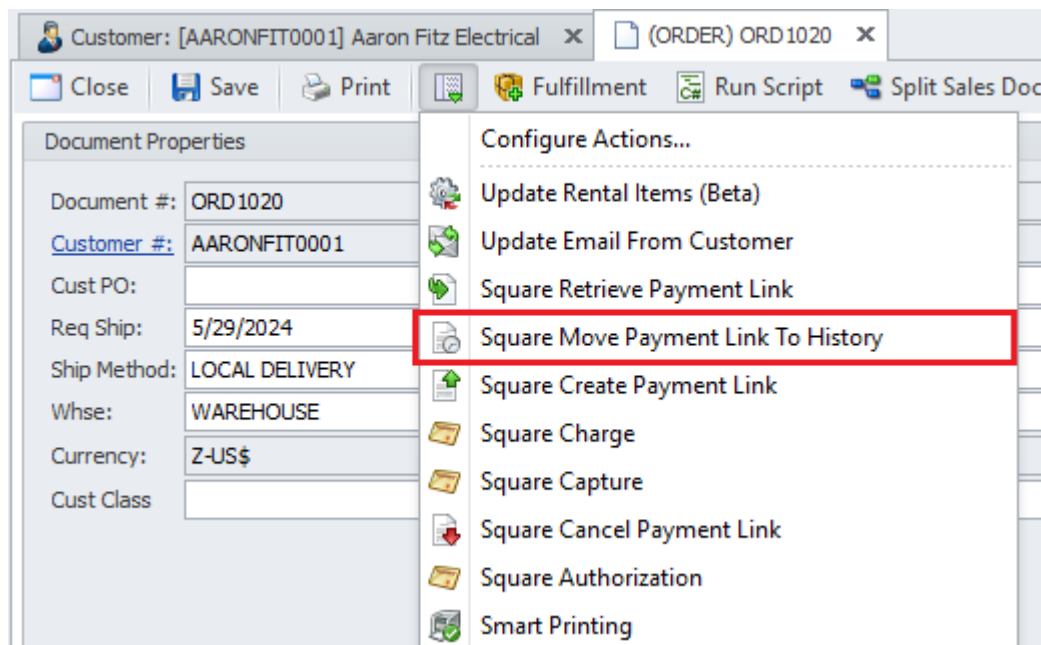
The Square Cancel Payment Link plugin cancels the existing payment link for the sales document. Simply select the Square Cancel Payment Link plugin in Sales Document Entry. SalesPad will display a notification for whether the payment link cancellation was successful.



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:

 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

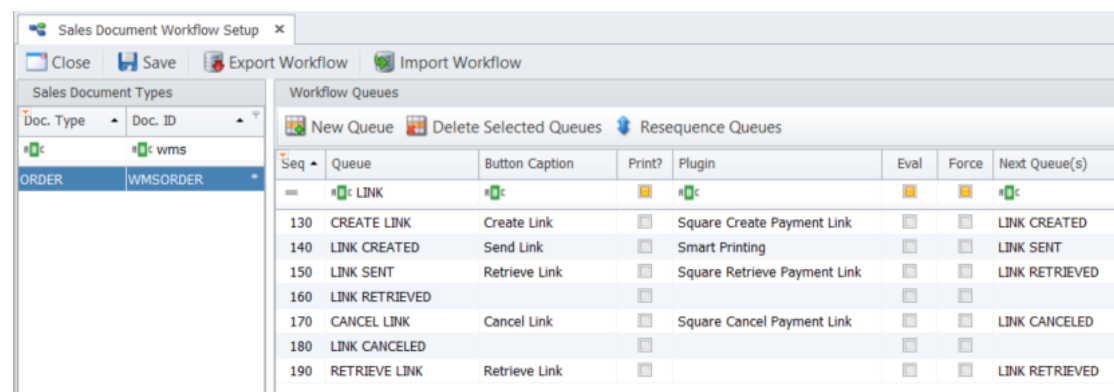
First name

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 [Desktop: Workflow](#) 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.



Seq	Queue	Button Caption	Print?	Plugin	Eval	Force	Next Queue(s)
=	LINK	LINK					
130	CREATE LINK	Create Link		Square Create Payment Link			LINK CREATED
140	LINK CREATED	Send Link		Smart Printing			LINK SENT
150	LINK SENT	Retrieve Link		Square Retrieve Payment Link			LINK RETRIEVED
160	LINK RETRIEVED						
170	CANCEL LINK	Cancel Link		Square Cancel Payment Link			LINK CANCELED
180	LINK CANCELED						
190	RETRIEVE LINK	Retrieve Link					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.



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

Square Payment Link Test

Refresh

Save

Configure Run Options

Set Automation Schedule

Dis...

Automation

Automation Name: Square Payment Link Test

Platform: Square Payment Link

Description:

Action Center

Settings

Audit

Retrieve Payment Link

Export

Import

Filter:

A-Z

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.