

# **ACCEPT BLUE PAYMENTS - NETSUITE BUNDLE USER GUIDE**

**DATE: 4/15/2024  
V1.9.0**

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## 1 PROCESSING PROFILE

The ABP Processing Profile is a central configuration record within the Accept Blue NetSuite plugin. It defines how payment processing should be handled, including credit card and ACH transactions.

Section	Field	Description	Example Value
Primary	Name	The name of the profile to identify it within the system.	Default
	Inactive	Checkbox to mark the profile inactive.	Unchecked
	Default	Checkbox to set the profile as the default profile.	Checked
	Make CVV Optional	Checkbox to determine if CVV is required during transaction processing.	Checked
	Allow Partial Payments	Checkbox to allow payments less than the total invoice amount.	Checked
Credentials	URL	The endpoint URL for Accept Blue API.	<a href="https://api.develop.accept.blue/api/v2/">https://api.develop.accept.blue/api/v2/</a>
	Source Key	Unique identifier provided by Accept Blue.	Ck5gB41a7KyA2oqKW5uOp6oEgpDQKgtuy
	Pin	PIN associated with your Source Key for security.	1234
Gateway Request Types	Authorizations	Checkbox to enable authorization of transactions.	Checked
	Captures	Checkbox to enable the capture of transactions.	Checked
	Sales	Checkbox to enable direct sales transactions.	Checked
	Refunds	Checkbox to enable the processing of refunds.	Checked
	Credits	Checkbox to enable the issuing of credits.	Checked

Section	Field	Description	Example Value
	Voids	Checkbox to enable the voiding of transactions.	Checked
Online Pages	Token Key	A secure key for tokenizing payment information.	pkJafgnLNKeUBWObZrX5BkbYcbzO4ei
	Request From	Record type that requests payments.	REQUEST FROM (This should be a specific record type.)
	Save Card Behavior	Defines how to handle storing card information.	Default and Ask
	Request Email Template	Email template for payment processing communications.	REQUEST EMAIL TEMPLATE (Select an email template from the list.)
Surcharge	Surcharge Item	Item representing additional fees applied to transactions.	Surcharge
	Surcharge Invoice Form	Form used for invoices with surcharge line items.	Custom Product Invoice
	Late Charge Item	Item used to apply late fees to overdue invoices.	LATE CHARGE ITEM (Specify the actual item.)
	Late Charge Invoice Form	Form for invoices including late charge line items.	LATE CHARGE INVOICE FORM (Select the appropriate form.)

## 2 LATE CHARGE RULES PROFILE

Utilize the late charge rules processing profile if you plan to have overdue late charges when customers do not pay on time. Create a new profile for each rule that you want to set.

Field	Description	Example Value
Days Overdue	Set the time limit in days. After the amount of days has been exceeded a fee will be added to the invoice.	10
Overdue Fee Percentage	Percentage amount to add on top of the invoice amount after Days Overdue has been exceeded.	0.05
Field ID Rule	If you have a Field rule that the late charge needs to obey input the field ID here. For example, charge users with an American Express Card more of a percentage.	custbody_field123
Field Value Rule	Set the field ID value here of what should happen if the field ID is true.	custbody_field123

Field	Description	Example Value
Processing Profile	Select processing profile this rule should apply to.	Default

## 2.1 SURCHARGE ITEM SETUP

This is for the processing profile if there is no surcharge item created. Note that surcharges also need to be setup at the gateway level. Setting it up just in NetSuite won't generate a surcharge.

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Open the ABP Processing Profile List.
3. Edit the already created record.
4. Go to the Surcharge subtab.
5. Select the Surcharge Item and/or Surcharge Invoice Form from the drop dropdown menu.
6. If a Surcharge Item is not created, create a new item.
  - a. Go to Lists > Accounting > Items > New.
  - b. Select Other Charge for Sale.
  - c. Select a standard form if possible.
  - d. Enter the name of the item as Surcharge Item.
  - e. Enter Sales Description
  - f. Choose the Accounting preferences (which account the charges should go).
  - g. Save the item.

## 2.2 LATE CHARGE ITEM SETUP

This will be for the processing profile if a Late Charge Item is not created, create a new item:

- Go to Lists > Accounting > Items > New.
- Select Other Charge for Sale.
- Select a standard form if possible.
- Enter the name of the item as Late Charge Item.

- Enter Sales Description
- Choose the Accounting preferences (which account the charges should go).
- Save the item.

## 3 STORING CARDS

### 3.1 VIA CUSTOMER PROFILE

The ABP Saved Card record, accessible under the Financial tab within a customer's profile, is used to securely store payment method details for future transactions. This enables a smoother checkout process by allowing the reuse of saved payment details. Here's how to store a card:

#### **Accessing the ABP Saved Card**

1. Navigate to the desired customer profile in NetSuite.
2. Select the Financial tab.
3. Locate and click on the ABP Saved Card record.

Sales
Address
Relationships
Communication
**Financial**
Marketing
Support
Preferences
System Information
SuiteCommerce Extensions
Billing Accounts

**Account Information**

ACCOUNT	PRICE LEVEL
DEFAULT RECEIVABLES ACCOUNT <a href="#">Use System Preference</a>	CREDIT LIMIT HOLD Auto
TERMS Net 30	PRIMARY CURRENCY US Dollar

**Tax Information**

TAX ITEM	TAX REG. NUMBER	<input type="checkbox"/> TAXABLE
----------	-----------------	----------------------------------

**Balance Information**

BALANCE 5,000.00	OVERDUE BALANCE 5,000.00	UNBILLED ORDERS 0.00
DEPOSIT BALANCE 0.00	DAYS OVERDUE 209	
CURRENT 1-30 DAYS 31-60 DAYS 61-90 DAYS OVER 90 DAYS 0.00 0.00 0.00 0.00 5,000.00		
BILLING SCHEDULE		

Credit Cards
Currencies •
Group Pricing
Item Pricing
**ABP Saved Card •**

VIEW
ABP SAVED CARD
Default View

New ABP Saved Card
Attach
Customize View

EDIT	NAME ▲	EXPIRATION DATE (MM/YYYY)	DEFAULT CARD
<b>Edit</b>	American Express 6961	12/2025	Yes

Edit
Back
Accept Payment
ABP Request Credit Card
Actions

## Entering Card Information

Card Information Section:

- Customer: The customer to whom the card belongs. This should auto-populate based on the profile you are in.
- Type: Select the type of card from the drop-down list, e.g., Visa, MasterCard.
- Default Card: Check this if you want the card to be the default payment method for the customer.
- Inactive: Check this if the card is not currently active or in use.
- ABP Processing Profile: Select the appropriate ABP Processing Profile that will govern the transaction processing rules for this card.

**ABP Saved Card**
← → List Search Customize More

**American Express 6961**

Save
Cancel
Change ID
Actions

**Card Info**

NAME  
American Express 6961

CUSTOMER  
Abbott Inc.

TYPE \*  

American Express

☒ DEFAULT CARD  
☐ INACTIVE

ABP PROCESSING PROFILE  

Default

**Card Details**

CARDHOLDER NAME  
Ash Alex

CREDIT CARD NUMBER

EXPIRATION DATE (MM/YYYY)  
12/2025

ADDRESS  
111 W Eastside Road

ZIPCODE  
12345

CREDIT CARD NUMBER MASKED  
\*\*\*\*\*6961

TOKEN  
OFBT400Z6MIBTMQL

**ACH Details**

### Card Details Section:

If the payment method is a credit card, you will fill out relevant fields in this section.

- Card Number: Enter the credit card number. The field may display as masked for security reasons.
- Expiration Date (MM/YY): Enter the expiration date of the card.
- CVV: Enter the card verification value.
- Cardholder Name: The name as it appears on the credit card.
- Address: The billing address associated with the credit card.
- ZIP Code: The billing ZIP code for the card.
- Token: A secure token representing the stored card. This is typically generated by the payment processor to maintain PCI compliance.

### ACH Details Section:

If the payment method is ACH, you will fill out relevant fields in this section.

- Account Name
- Account Number
- Routing number

### **Saving the Payment Method**

After all relevant information is entered, click 'Save' to store the payment method. Ensure that all necessary fields are completed accurately to avoid processing errors in future transactions. It is recommended to verify the details with the customer to ensure they are current and correct.

## **3.2 VIA TRANSACTION**

The ABP Saved Card record, accessible under the Billing tab within a customer's profile, is used to securely store payment method details for future transactions. This enables a smoother checkout process by allowing the reuse of saved payment details. This can be done on the record under the Billing tab or can be done when accepting a payment. Here's how to store a card:

1. Open the transaction record you would like to store the card for.
2. This can be achieved by editing the record and adding the card or accepting a payment and adding the card.
3. Make sure to select the processing profile (should automatically populate but make sure it is the correct one)
4. Next to the ABP Saved Card Select field click on the plus button.
5. Fill in the required fields:
  - a. Processing Profile
  - b. Type
  - c. If ACH:
    - i. Account Name
    - ii. Account Number
    - iii. Routing Number
  - d. If Credit Card:
    - i. Card Number
    - ii. Expiration Date
    - iii. Zip Code
    - iv. Card Holder Name
    - v. Address
6. Save and the card will be imported and can be used for future use.

Items
Promotions
Shipping
**Billing**
Accounting
Relationships
Communication
Related Records
System Information
Custom
Bronto
POS

**Billing Information**
TERMS  
2% 10 Net 30

**Billing Address**
BILL TO SELECT  
- Custom -

BILL TO  
Maria Rogers  
Abbott Inc.  
1200 International Drive  
San Diego CA 92154  
United States

Map

AMOUNT AFTER DISCOUNT  
4,900.00

TAX AFTER DISCOUNT  
0.00

TOTAL AFTER DISCOUNT  
4,900.00

ABP PAYMENT LINK  
https://tstdrv2474590.extforms.netsuite.com/app/site/hosting/script

**Payment •**

ABP ACCOUNT NAME

ABP ACCOUNT NUMBER

ABP ACCOUNT NUMBER MASKED

ABP ADDRESS

ABP CARDHOLDER NAME

ABP CREDIT CARD NUMBER

ABP CREDIT CARD NUMBER MASKED

ABP EXPIRATION DATE

☐ ABP ONE TIME USE CARD

ABP ROUTING NUMBER

ABP ZIP

ABP SAVED CARD SELECT

ABP PROCESSING PROFILE  
Default

NOTICE: AVS is required for processing

Accept Blue Transaction Logs

EDIT	PAYMENT METHOD	REFERENCE NUMBER	AUTH CODE	AUTH AMOUNT	STATUS	STATUS CODE	COMMAND	SAVED CARD
No records to show.								

> Gift Certificate

Save
Cancel
Void

Actions

## 4 PROCESSING PAYMENTS

### 4.1 CUSTOMER PAYMENTS

To enhance the efficiency of payment collections, the Accept Blue NetSuite plugin provides two methods for processing customer payments directly from an invoice: using a saved payment method (ABP Saved Card) or entering card details for a one-time transaction (ABP One Time Use Card).

#### Using the ABP Saved Card

For customers with a stored payment method, follow these steps to process the payment:

1. Open the Invoice: Navigate to the specific invoice you wish to collect payment for.

2. Click on the Accept Payment button at the top of the screen.
3. Select Payment Method: In the payment section, locate the 'ABP Saved Card' field. Here, select the saved card you intend to use for the payment. Cards marked as 'Default' will typically appear at the top of the list.
4. Make sure to select the processing profile (should automatically populate but make sure it is the correct one)
5. Verify Details: Ensure that the selected payment method has the correct billing details and is not marked as inactive.
6. Process Payment: Once the payment method is selected and confirmed, proceed to process the payment by following your standard operating procedures for transaction processing within NetSuite.
7. Confirmation: After processing, verify that the invoice status updates to reflect the payment, indicating that the transaction was successful.
  - a. Note that you can view successful payments toward the record in the Payment Events section.

**Payment**

[List](#)
[Search](#)
[Customize](#)
[More](#)

Save

Cancel

Actions

Primary Information

CUSTOM FORM \*  
ABP Customer Payment

CUSTOMER \*  
Abbott Inc.

PAYMENT #  
290

BALANCE PENDING  
5,000.00 0.00

CURRENCY \*  
US Dollar

EXCHANGE RATE \*  
1.00

A/R ACCOUNT  
1110 Accounts Receivable: Trade Receivables

☐ UNDEPOSITED FUNDS  
☒ ACCOUNT  
1010 Cash : Checking - US

DATE \*  
4/16/2024

POSTING PERIOD  
Apr 2024

MEMO

Summary

TO APPLY	5,000.00
APPLIED	5,000.00
UNAPPLIED	0.00

Classification

SUBSIDIARY  
United States

CLASS

LOCATION  
03: Chicago

DEPARTMENT

Apply
Payment Method
Relationships
Communication
Custom

PAYMENT METHOD  

...

CHECK #  

CC APPROVED

CHARGE CREDIT CARD

ABP ACCOUNT NAME

ABP ACCOUNT NUMBER

ABP ADDRESS  

...

Choose a saved card to display its AVS

ABP CARDHOLDER NAME

ABP CREDIT CARD NUMBER

ABP CVV

ABP EXPIRATION DATE

☐ ABP ONE TIME USE CARD

ABP ROUTING NUMBER

ABP ZIP

ABP SAVED CARD SELECT  
American Express 6961

ABP PROCESSING PROFILE (2)  
Default

Payment Events

DATE	TRANSACTION	EVENT	HANDLING MODE	PAYMENT OPTION	RESULT	REASON	AMOUNT	VIEW DETAILS
No records to show.								

### Using the ABP One Time Use Card

For processing a payment without saving the card information, use the ABP One Time Use Card feature:

1. Locate the invoice in question within NetSuite and open the invoice.
2. Click on the Accept Payment button at the top of the screen.
3. Enter Payment Details: Scroll to the payment method section, where you'll enter the customer's payment card details. This typically includes the card number, expiration date, CVV, and billing address information.
4. Make sure to select the processing profile (should automatically populate but make sure it is the correct one)
5. PCI Compliance: Ensure you comply with PCI DSS requirements, which may mean that the card details are entered through a secure payment window or interface provided by Accept Blue.
6. Process Payment: With the payment details entered, proceed to initiate the payment processing. This action may involve clicking a 'Process' or 'Submit' button, depending on your specific plugin configuration.
7. Confirmation and Receipt: Confirm that the invoice reflects the payment, and provide the customer with a receipt if required. The one-time use card details should not be stored, ensuring compliance with security standards.

Note: It is crucial to handle all payment information securely and in compliance with PCI DSS standards to protect both the customer's information and your business. Ensure you're following all the necessary protocols for data handling and transaction processing.


## 4.2 CUSTOMER DEPOSITS

For transactions requiring a deposit or partial payment at the time of a sales order, you can efficiently record customer deposits using the Accept Blue NetSuite plugin. This can be done via a saved payment method (ABP Saved Card) or by entering details for a single-use (ABP One Time Use Card).

### Using the ABP Saved Card

To utilize a pre-stored payment method for the deposit:

1. Access the Sales Order: Open the sales order for which the deposit is being collected.
2. Click on the Create Deposit button to deposit the amount.
3. Navigate to Payments Method subtab.
4. Select the Saved Card: From the drop-down menu, choose the customer's saved card that will be used for the deposit. The default card will appear first if one is set.
5. Review Payment Details: Confirm the chosen card's details are up-to-date and the card is active.
6. Make sure to select the processing profile (should automatically populate but make sure it is the correct one)
7. Enter Deposit Amount: In the appropriate field, input the amount of the deposit that is being collected.
8. Process the Deposit: Follow the prompts to process the deposit. Look for a confirmation message or indicator to ensure the transaction has been completed successfully.
9. Sales Order Update: The sales order should now reflect the deposit in the payments section, indicating the amount has been secured.


**Customer Deposit**

List Search Customize More

Save Cancel Actions

**Primary Information**

CUSTOM FORM \*  
ABP Customer Deposit

CUSTOMER  
CEM Supplies

SALES ORDER  
Sales Order #315

DEPOSIT #  
13

PAYMENT AMOUNT \*  
900.00

CURRENCY  
US Dollar

EXCHANGE RATE \*  
1.00

DATE \*  
4/16/2024

POSTING PERIOD  
Apr 2024

☐ UNDEPOSITED FUNDS  
☒ ACCOUNT  
1010 Cash : Checking - US

MEMO

**Classification**

SUBSIDIARY  
United States

DEPARTMENT

CLASS

LOCATION

Payment Method Relationships Communication Custom

PAYMENT METHOD  
American Express

AVS: 111 W Eastside Road, 12345  
NOTICE: AVS is required for processing  
ABP CVV

☐ ABP ONE TIME USE CARD  

ABP SAVED CARD SELECT \*  
American Express 6961

ABP PROCESSING PROFILE  
Default

**Payment Events**

DATE	TRANSACTION	EVENT	HANDLING MODE	PAYMENT OPTION	RESULT	REASON	AMOUNT	VIEW DETAILS
No records to show.								

Save Cancel Actions

## Using the ABP One Time Use Card

For a deposit using card details for a one-time transaction:

1. Open the Sales Order: Find the specific sales order that the customer deposit will be applied to.
2. Click on the Create Deposit button to deposit the amount.
3. Navigate to Payments Method subtab.
4. Click on the ABP One Time Use Card check box to enter credit card details.
5. Input One-Time Use Card Details: securely enter the customer's card details required for the deposit transaction.
6. Make sure to select the processing profile (should automatically populate but make sure it is the correct one)
7. Compliance Check: Make sure all card data entry complies with PCI DSS standards, potentially via a secure payment interface.
8. Specify Deposit Amount: Clearly specify the amount of the deposit you are processing in the designated field.
9. Initiate Deposit Processing: Click the appropriate button to start the deposit transaction. A secure interface may be used to complete the processing.
10. Verify Transaction Success: Ensure the transaction is successful and the sales order is updated to reflect the customer deposit.


### 4.3 CUSTOMER REFUND

To issue a refund on a customer deposit for a sales order in NetSuite, you can follow these steps:

#### Using the ABP Saved Card

To utilize a pre-stored payment method for the deposit:

1. Go to Transactions > Customers > Refund Customer.
2. Select the customer for whom the refund is being issued.
3. The system will prompt you to choose the deposits or credit memos available for refunding. Select the appropriate customer deposit.
4. Fill out any necessary information in the Primary Information section.
5. Under the Apply subtab select the customer deposit you want to refund.
6. Under the Refund Method subtab select the credit card used to refund the amount to in the ABP Saved Card Select field.
7. Make sure to select the processing profile (should automatically populate but make sure it is the correct one)
8. Review the information to make sure everything is correct.
9. Submit the refund. This action will create a customer refund record and update the customer deposit and associated financial accounts accordingly.
10. Verify Financial Impact: Verify that the accounting entries reflect the refund correctly. Check the impact on your general ledger, ensuring that the accounts receivable and cash or bank accounts are adjusted appropriately.


**Accept Blue Payment Processor**  
 This transaction will create a credit for the total amount

**Customer Refund**
List Search Customize More

Save Cancel Actions

**Primary Information**

CUSTOM FORM \*  
 ABP Customer Refund

TRANSACTION NUMBER  
 To Be Generated

CUSTOMER \*  
 CEM Supplies

BALANCE  
 635.79

ACCOUNT \*  
 1010 Cash : Checking - US

☐ TO BE PRINTED

A/R ACCOUNT \*  
 1110 Accounts Receivable: Trade Receivables

REFUND AMOUNT  
 0.00

CURRENCY \*  
 US Dollar

EXCHANGE RATE \*  
 1.00

DATE \*  
 4/16/2024

POSTING PERIOD  
 Apr 2024

MEMO

Relationships Apply Payee Address **Refund Method** Communication Custom

REFUND METHOD \*  
 American Express

☐ CC APPROVED

CHECK #

 AVS: 111 W Eastside Road, 12345  
 NOTICE: AVS is required for processing
 
☐ ABP ONE TIME USE CARD
 
 ABP SAVED CARD SELECT \*  
 American Express 6961
 
 ABP PROCESSING PROFILE (2)  
 Default

### Using the ABP One Time Use Card

For a deposit using card details for a one-time transaction, note the difference in step 6:

1. Go to Transactions > Customers > Refund Customer.
2. Select the customer for whom the refund is being issued.
3. The system will prompt you to choose the deposits or credit memos available for refunding. Select the appropriate customer deposit.
4. Fill out any necessary information in the Primary Information section.
5. Under the Apply subtab select the customer deposit you want to refund.
6. Under the Refund Method subtab check the ABP One Time Use Card checkbox and fill out the required fields, such as refund method, credit card details, address, and any other required fields.
7. Make sure to select the processing profile (should automatically populate but make sure it is the correct one)
8. Review the information to make sure everything is correct.
9. Submit the refund. This action will create a customer refund record and update the customer deposit and associated financial accounts accordingly.
10. Verify Financial Impact: Verify that the accounting entries reflect the refund correctly. Check the impact on your general ledger, ensuring that the accounts receivable and cash or bank accounts are adjusted appropriately.

## 4.4 AUTHORIZATIONS

Authorizing a sales order is a crucial step in securing payment while allowing time for order processing and shipment. The ABP Get Authorization field is utilized to obtain a hold on funds on the customer's payment method, ensuring that the amount will be available when the sale is finalized.

### Authorizing a Sales Order

Follow these steps to authorize a payment on a sales order:

1. Open the Sales Order: Locate and open the sales order for which payment authorization is needed.
2. Review the Order Details: Confirm all sales order details, including items, quantities, and prices, are correct and finalized.
3. Select Payment Method: Choose the customer's preferred payment method. This can be a saved card via the ABP Saved Card option or new card details entered for a one-time authorization.
4. ABP Get Authorization: In the payment section, you'll find the 'ABP Get Authorization' field. This is where you'll specify that an authorization is required.
5. Specify Authorization Amount: Enter the amount you wish to authorize. This is typically the total order amount, but could be a partial amount depending on your pre-arranged payment terms with the customer.
6. Initiate Authorization: Trigger the authorization process. Depending on your setup, this might involve clicking a 'Get Authorization', 'Process', or 'Submit' button.
7. Confirmation of Authorization: Await a confirmation message or indicator that the authorization has been successfully processed. This might include an authorization code or reference number.
8. Sales Order Update: Ensure the sales order is updated to reflect the successful authorization, with appropriate notes or status updates to indicate that the funds have been secured.

### Things to Consider

1. **Authorization Expiry:** Be aware that authorizations are temporary. You will need to capture the authorized funds (settle the transaction) within the payment processor's specified timeframe to ensure the funds are collected.
2. **Authorization Only Transactions:** If the business process involves a delay between order placement and fulfillment, use an 'Authorization Only' transaction type to avoid capturing funds before the order is ready for shipment.
3. **Partial Authorizations:** In some cases, you may want to authorize a partial amount rather than the full total. Ensure your payment processor and NetSuite configuration support partial authorizations.
4. **Compliance and Security:** It is critical to handle all payment authorizations in compliance with PCI DSS guidelines. Ensure that any payment information, whether for a saved card or a new entry, is processed through secure channels.

## 4.5 CASH SALES

Cash sales in NetSuite are transactions where payment is collected immediately at the point of sale. The Accept Blue NetSuite plugin can facilitate cash sales processing by applying the payment to the sale instantly. Here's a guide to executing a cash sale:

### Initiating a Cash Sale

1. **Navigate to Cash Sale:** From the NetSuite dashboard, go to the 'Transactions' menu, select 'Sales', and then 'Enter Cash Sales' to create a new cash sale record.
2. **Enter Sale Details:** Fill in the necessary details of the sale, including the customer's name, item(s) sold, quantities, and any applicable sales taxes or discounts.
3. **Select Payment Method:** Choose the method of payment. For cash sales, the payment method may be actual cash, or it could be a debit/credit card processed as a cash transaction.
  - a. **If using the ABP Saved Card:** Select the Saved Card:  
In the payment section, select the card from the customer's saved cards if the customer opts to use a pre-stored method.
  - b. **If using the ABP One Time Use Card:**  
**Enter Card Details:** Securely enter the payment details for processing the transaction.
4. **Make sure to select the processing profile** (should automatically populate but make sure it is the correct one)
5. **Process Payment:** Complete the charge by following the prompts provided by the payment gateway interface.
6. **Payment Confirmation:** After processing the payment, you should receive a confirmation message. Confirm that the cash sale record reflects the payment as collected.
7. **Receipt Generation:** Provide the customer with a receipt, which can be printed or emailed directly from NetSuite.
8. **Complete the Sale:** Review all details for accuracy, then save and close the cash sale record.

Items
Promotions
Shipping
Billing
Accounting
Relationships
Communication
Related Records
System Information
Custom
Bronto
SCIS\_Fallback
P

Billing Address

BILL TO SELECT

BILL TO  
Map

AMOUNT AFTER DISCOUNT

TAX AFTER DISCOUNT

TOTAL AFTER DISCOUNT

ABP PAYMENT LINK

Payment

PAYMENT METHOD  
American Express

CREDIT CARD APPROVED  
CHARGE CREDIT CARD

P/N REF.

AUTH. CODE

CHANGE DUE  
3.88

CREDIT CARD SIGNATURE

TOTAL TENDERED  
350.00

AVS: 111 W Eastside Road, 12345  
NOTICE: AVS is required for processing

ABP CVV

ABP ONE TIME USE CARD  
ABP RE-CHARGE TRANSACTION

ABP SAVED CARD SELECT \*  
American Express 6961

ABP PROCESSING PROFILE  
Default

## 4.6 CASH SALE REFUND


When a transaction requires a refund, the Accept Blue NetSuite plugin allows for an efficient process to return funds to the customer. This can be for the entire amount of the cash sale or a portion of it.

### Steps to Issue a Cash Sale Refund

1. Access the Original Cash Sale Record: Navigate to the original cash sale transaction within NetSuite by selecting 'Transactions', then 'Sales', and 'Find Cash Sales'.
2. Review the Cash Sale: Verify the details of the cash sale to ensure accuracy before proceeding with the refund.
3. Initiate the Refund Process: Look for an option to issue a refund, which may be labeled as 'Refund', 'Return', or 'Credit'. This may be located within an actions menu or as a button on the cash sale record.
4. Select the Refund Method: If the original transaction was completed using a card through the Accept Blue plugin, you can process the refund back to the card. Choose between the ABP Saved Card (if the customer used a stored card) or ABP One Time Use Card (for entering card details manually if the original card is not stored or a different card is used).
5. Enter Refund Details: For the ABP Saved Card, select the appropriate card from the customer's saved methods.

For the ABP One Time Use Card, securely enter the card details for the refund. Specify the amount to be refunded if it is not a full refund. Include any pertinent notes or reasons for the refund, as required by your company's policies.

6. Make sure to select the processing profile (should automatically populate but make sure it is the correct one)
7. Process the Refund: Execute the refund by clicking the appropriate button, such as 'Process Refund' or 'Submit'. Wait for the confirmation that the refund has been successfully processed. This may include a transaction ID or confirmation message.
8. Finalize and Document the Refund: The cash sale record should now reflect the refunded amount, altering the transaction's status accordingly.
9. Provide the customer with proof of the refund, such as a receipt or credit memo, for their records.


**Cash Refund**
🔍
List Search Customize More

**To Be Generated**

Save
Cancel
Actions

**Primary Information**

REFUND #  
To Be Generated

CUSTOMER \*  
1596738489869fxrz

BILLING ACCOUNT  

☐ CREATE CHECK
☐ PRINT CHECK

ACCOUNT  
1090 Undeposited Funds

CURRENCY  
US Dollar

EXCHANGE RATE \*  
1.00

DATE \*  
4/16/2024

AS-OF DATE  
4/16/2024

POSTING PERIOD \*  
Apr 2024

CHECK #

MEMO

Summary	
SUBTOTAL	319.00
DISCOUNT	0.00
TAX TOTAL	27.12
SHIPPING COST	
<b>TOTAL</b>	<b>346.12</b>

Items Promotions Shipping **Billing** Accounting Relationships Communication Related Records System Information Custom Bronto SCIS.Fallback PO

**Payment •**

PAYMENT METHOD  
Cash

☒ CREDIT CARD APPROVED
☐ PROCESS CREDIT CARD

P/N REF.

CHANGE DUE  
3.88

CREDIT CARD SIGNATURE

TOTAL TENDERED  
350.00

ABP ACCOUNT NAME

ABP ACCOUNT NUMBER

ABP ACCOUNT NUMBER MASKED

ABP ADDRESS  
Choose a saved card to display its AVS

ABP CARDHOLDER NAME

ABP CREDIT CARD NUMBER

ABP CREDIT CARD NUMBER MASKED

ABP EXPIRATION DATE

☐ ABP ONE TIME USE CARD

ABP ROUTING NUMBER

ABP ZIP

ABP SAVED CARD SELECT

ABP PROCESSING PROFILE

## 5 IMPORTING SAVED CARDS

### CSV with these columns:

- Credit Cardholder Name (req)
- Name
- Credit Card Number
- Customer Internal ID
- CC Exp (MM/YYYY)
- Credit Card Type
- Default Credit Card
- Zip Code

### CSV Import Page:

#### Scan & Upload CSV File

IMPORT TYPE

Custom Records

Choose the category of data to import.

RECORD TYPE

ABP Saved Card

Choose the record type of data to import.

CHARACTER ENCODING

Western (Windows 1252)

Choose another character encoding format if you use an inte

CSV COLUMN DELIMITER

Comma

Select the symbol to be used as a column separator in the CS

## Advanced Import Options

### Import Options

☒ ADD  
☐ UPDATE  
☐ ADD OR UPDATE

☐ LOG SYSTEM NOTES FOR CUSTOM FIELDS  
Enable this option to create system notes during import of custom field data. Impacts performance; recommended only when custom fields require an audit trail.

☐ OVERWRITE MISSING FIELDS  
For updates, enable this option to clear NetSuite fields mapped to CSV file fields that do not contain data.

☐ VALIDATE MANDATORY CUSTOM FIELDS  
Enable this option to require mandatory custom field data to be present for records to be created.

☐ OVERWRITE SUBLISTS  
For updates, enable this option to cause imported sublist data to completely replace existing sublist data, instead of selectively updating or being appended. ... [more](#)

CSV DECIMAL DELIMITER

Period

Select the symbol to be used as a decimal mark in the CSV files you import. This setting overrides the decimal mark preference specified at Home > Set Preferences.

CUSTOM FORM

Standard ABP Saved Card Form

By default, your preferred form determines NetSuite fields that can be mapped for importing. To vary these fields, select a different form.

☒ RUN SERVER SUITESCRIPT AND TRIGGER WORKFLOWS

Check to specify that any server-side SuiteScripts and workflows should be triggered for the current CSV import. Note that running server SuiteScript slows the save p... [more](#)

## Field Mapping:

### Field Mapping

Your Fields

**results (6).csv**

**Credit Cardholder Name (req)**

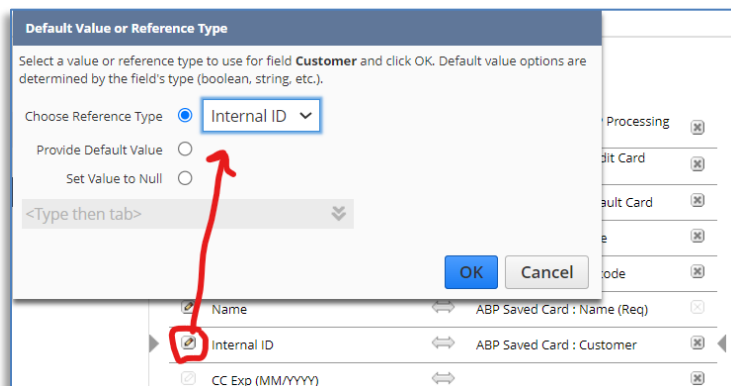
- Name
- Credit Card Number
- Internal ID
- CC Exp (MM/YYYY)
- Credit Card Type
- Default Credit Card
- Zip Code

<input checked="" type="checkbox"/> Default	↔	ABP Saved Card : ABP Processing Profile	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Credit Card Number	↔	ABP Saved Card : Credit Card Number	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Default Credit Card	↔	ABP Saved Card : Default Card	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Credit Card Type	↔	ABP Saved Card : Type	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Zip Code	↔	ABP Saved Card : Zipcode	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Name	↔	ABP Saved Card : Name (Req)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Internal ID	↔	ABP Saved Card : Customer	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> CC Exp (MM/YYYY)	↔	ABP Saved Card : Expiration Date (MM/YYYY)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Credit Cardholder Name (req)	↔	ABP Saved Card : Cardholder Name	<input checked="" type="checkbox"/>
<input type="checkbox"/>	↔		<input type="checkbox"/>
<input type="checkbox"/>	↔		<input type="checkbox"/>

NetSuite Fields

- ABP Processing Profile
- Account Name
- Account Number
- Address
- Cardholder Name**
- Credit Card Number
- Customer
- Default Card
- Expiration Date (MM/YYYY)
- External ID
- Inactive
- Name (Req)
- Routing Number
- Type
- Zipcode

Use the pencil icon to set the Customer mapping from Name to Internal ID



**Default Value or Reference Type**

Select a value or reference type to use for field **Customer** and click OK. Default value options are determined by the field's type (boolean, string, etc.).

Choose Reference Type ☒ Internal ID ▼

Provide Default Value ☐

Set Value to Null ☐

<Type then tab> ▼

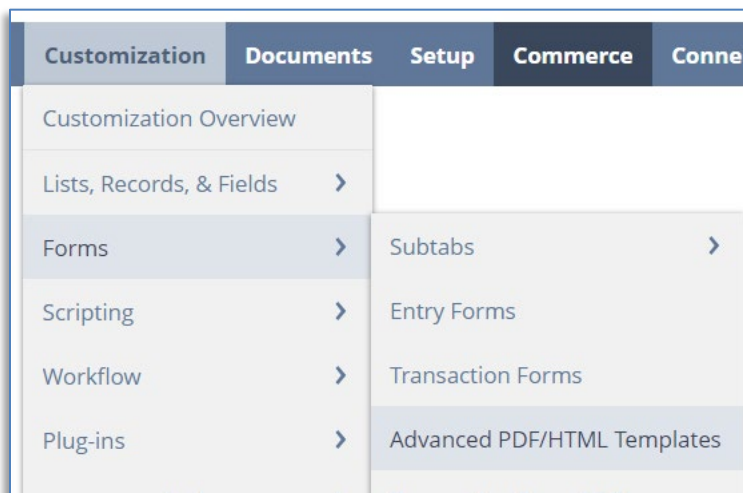
OK Cancel

<input checked="" type="checkbox"/> Name	↔	ABP Saved Card : Name (Req)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Internal ID	↔	ABP Saved Card : Customer	<input type="checkbox"/>
<input checked="" type="checkbox"/> CC Exp (MM/YYYY)	↔		<input type="checkbox"/>

## 6 ONLINE PAYMENT FORMS

### 6.1 PAYMENT BUTTON SETUP

1. Go to Customization > Forms > Advanced PDF/HTML Templates




Customization	Documents	Setup	Commerce	Connect
Customization Overview				
Lists, Records, & Fields >				
Forms >				
Scripting >				
Workflow >				
Plug-ins >				
		Subtabs >		
		Entry Forms		
		Transaction Forms		
		Advanced PDF/HTML Templates		

2. Click Edit on the Advanced PDF Template you want the button to appear on (Do this for Invoice PDF and Sales Order PDF).


Edit	ENT Sales Order PDF/HTML Template
<b>Edit</b>	Sales Order PDF/HTML Template w. Pay Button
Customize	Standard Sales Order PDF/HTML Template

3. Toggle to Source Code switch to green:


**Advanced PDF/HTML Template**  
Sales Order PDF/HTML Template w. Pay Button

Save ▼ | Template Setup | Cancel | Change ID | Actions ▼ | Copy to Account

New Element | Styles | Source Code ☐ | Preview 🔍


**Advanced PDF/HTML Template**  
Sales Order PDF/HTML Template w. Pay Button

Save ▼ | Template Setup | Cancel | Change ID | Actions ▼ | Copy to Account

Source Code ☒ | Preview 🔍

1 <?xml version="1.0"?><!DOCTYPE pdf PUBLIC "-//big.faceless.org//report" "report-1.1.dtd">

4. You can scroll down to the bottom of the code (or wherever the bottom of the template is where the button should be located) or where you want the button to appear. Copy and paste the below code into your PDF Template.

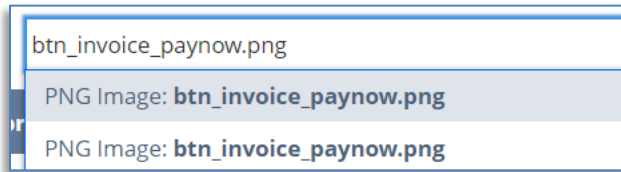
- a. **\*\* Keep this page open. \*\***

```

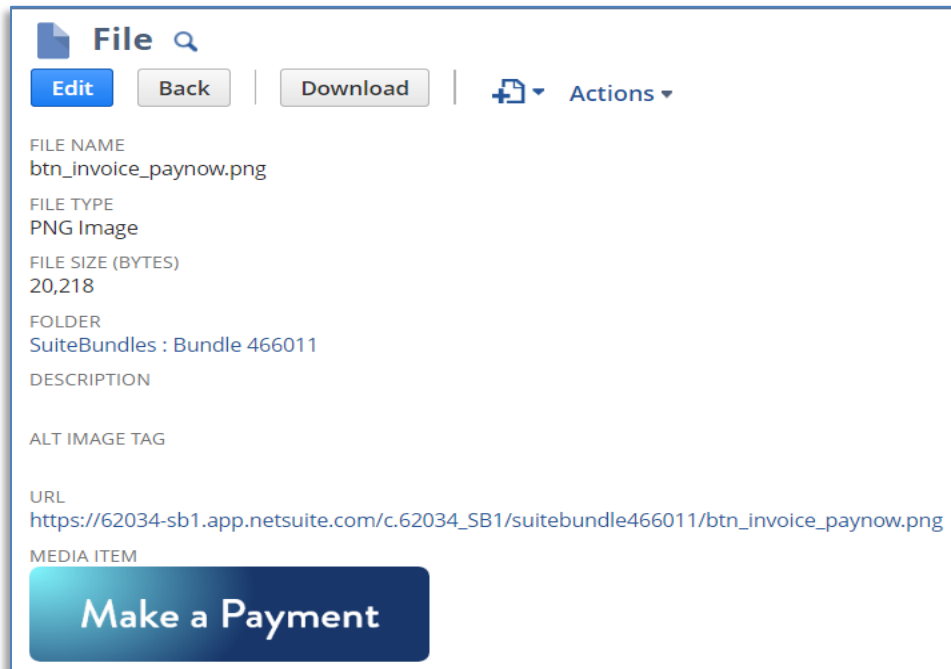
<#if record.custbody_abp_payment_link?has_content>
<table border="0" cellpadding="1" cellspacing="1" style="width:500px;"><tr> <td>
<a></a>
</td></tr></table>
</#if>

```

5. To find the correct link, go to Documents > Files > File Cabinet and search for the file "btn\_invoice\_paynow.png" and click on the PNG Image option.



6. Copy the URL on this page and paste it where indicated into the block of code in the PDF Template from step 4 make sure to delete the old URL and only paste the URL within the quotation marks.



7. Click Edit on the file and mark the box on the right "Available without login"
8. Save the PDF template and the button should now appear in the PDF of the record you added the code snippet to.

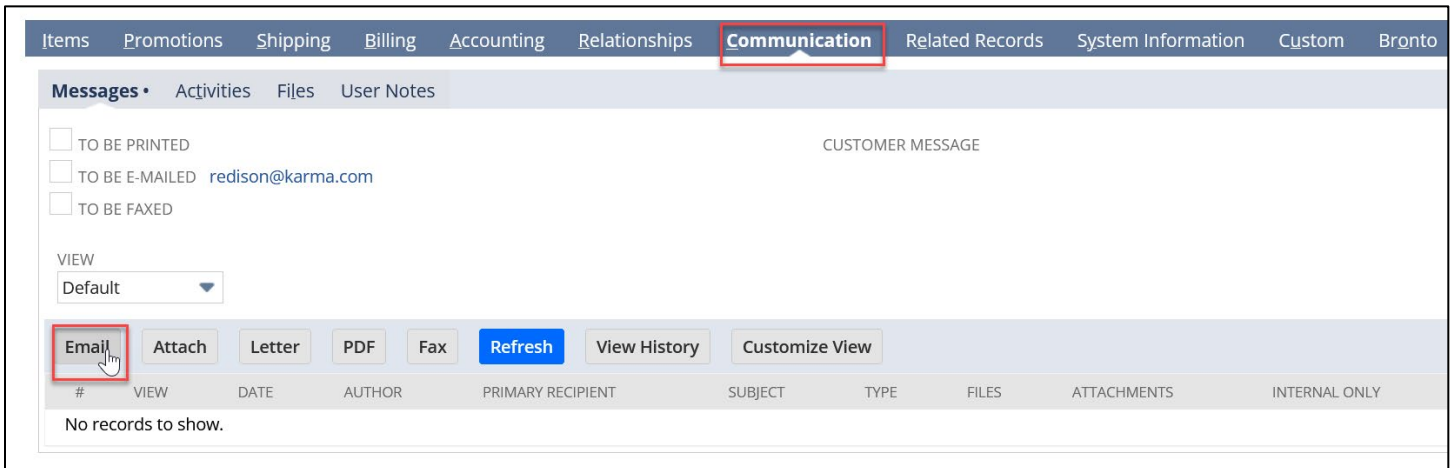
**\*\* Users attempting to access the ABP features after install will need to log out and back in to avoid permission errors. \*\***

## 6.2 CUSTOMER PAYMENTS

Online payments make it easy for customers to pay for their orders without need for manual entry for your employees. Simply send the form to the customer and request to enter their payment details after they click on the Make a payment button. There are several features that can be enabled like Surcharges for credit cards, partial payments, and the ability for customers to save their card. To access the payment page, the button will need to be added to the form, or the ABP Payment link will need to be sent to the customer.

### How to Email the form:

1. Go to the communication subtab in the Sales Order you want to send.
2. Select the Email button.
3. Enter recipients to send to.
4. Go to the Attachments subtab.
5. In the attach file section enter the Sales Order Number and the Sales Order PDF should appear if it is in your Documents in NetSuite
6. Select and add.
7. Click the merge and send button at the top of the screen.



Items Promotions Shipping Billing Accounting Relationships **Communication** Related Records System Information Custom Bronto

Messages • Activities Files User Notes

☐ TO BE PRINTED


☐ TO BE E-MAILED [redison@karma.com](mailto:redison@karma.com)

☐ TO BE FAXED

VIEW  
Default

**Email** Attach Letter PDF Fax Refresh View History Customize View

#	VIEW	DATE	AUTHOR	PRIMARY RECIPIENT	SUBJECT	TYPE	FILES	ATTACHMENTS	INTERNAL ONLY
No records to show.									


 **Email Message**

Merge & Send

Cancel

Preview

FOR MORE INFORMATION ON HOW REPLIES TO THIS EMAIL MESSAGE CAN BE RECEIVED AND SAVED, CLICK [HERE](#).

Recipients | Message | **Attachments** 

☐ ZIP ATTACHMENTS

ATTACH DOCUMENT TEMPLATE

☒ INCLUDE TRANSACTION

TYPE  
Default

Remove all

ATTACH FILE	FOLDER	SIZE (KB)	LAST MODIFIED	FILE TYPE
INV116782.pdf		87	04/15/2024 2:11 pm	PDF File

✓ Add

✗ Cancel

+ Insert


🗑 Remove

Merge & Send

Cancel

Preview

## Online Page:

 accept.blue®


**Sales Order #** 316  
**PO #**  
**Date** 4/16/2024  
**Due**

**Billing Address**  
Redison Karma  
Aloft Lexington Hotel  
Lexington MA 02421  
United States  
redison@karma.com

Item	Qty	Price	Total
XLR Precision Circular Saw	1	\$234.00	\$234.00
		SubTotal	\$234.00
		Discount	\$0.00
		Tax	\$0
		Shipping	10
		<b>Total</b>	<b>\$244.00</b>
		<b>Amount Due</b>	<b>\$244.00</b>
		<b>Payment Amount</b>	<b>\$244.00</b>
		<b>Total Payment</b>	<b>\$244.00</b>

**Save Card :** ☒

Payment Method  
Credit Card ▼

Card number  MM / YY CVV

**Billing Address**  
\*First Name:   
\*Last Name:   
Email:   
\*Address:   
\*City:   
\*State/Province:   
\*Postal Code:   
\*Country:

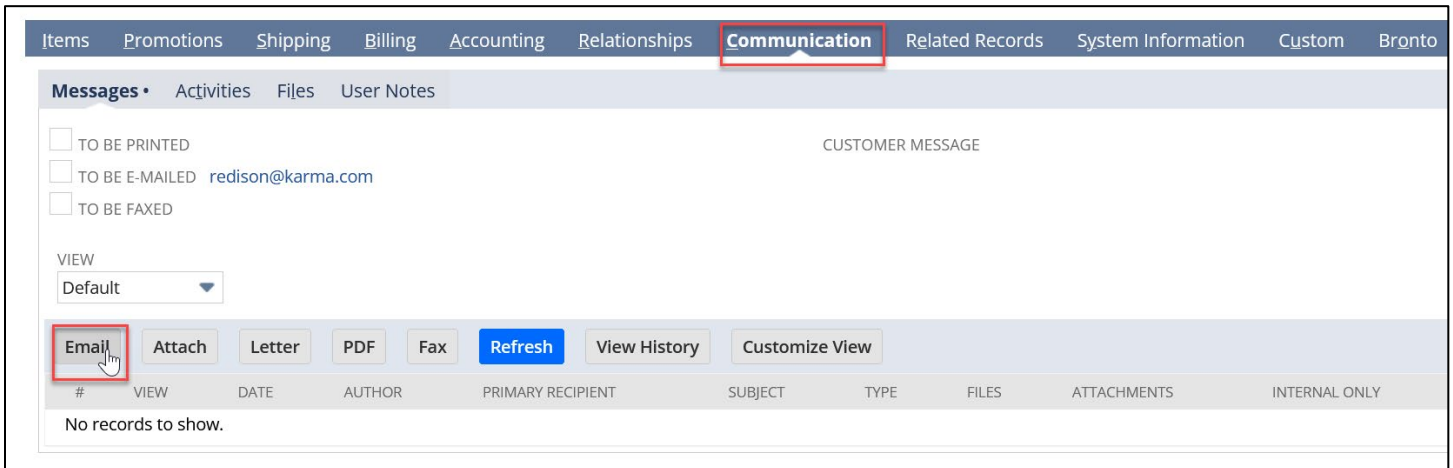
Submit

## 6.3 CUSTOMER DEPOSITS

Online payments make it easy for customers to pay for their orders without need for manual entry for your employees. Simply send the form to the customer and request to enter their payment details after they click on the Make a payment button. There are several features that can be enabled like Surcharges for credit cards, partial payments, late charges if a customer does not pay by a certain date (only available for invoices) and the ability for customers to save their card. To access the payment page, the button will need to be added to the form, or the ABP Payment link will need to be sent to the customer.

### How to Email the form:

1. Go to the communication subtab in the Sales Order you want to send.
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6. Select and add.
7. Click the merge and send button at the top of the screen.



Items Promotions Shipping Billing Accounting Relationships **Communication** Related Records System Information Custom Bronto

Messages • Activities Files User Notes

☐ TO BE PRINTED CUSTOMER MESSAGE


☐ TO BE E-MAILED redison@karma.com

☐ TO BE FAXED

VIEW  
Default

Email Attach Letter PDF Fax Refresh View History Customize View

#	VIEW	DATE	AUTHOR	PRIMARY RECIPIENT	SUBJECT	TYPE	FILES	ATTACHMENTS	INTERNAL ONLY
No records to show.									


 **Email Message**

Merge & Send

Cancel

Preview

FOR MORE INFORMATION ON HOW REPLIES TO THIS EMAIL MESSAGE CAN BE RECEIVED AND SAVED, CLICK [HERE](#).

Recipients | Message | **Attachments** 

☐ ZIP ATTACHMENTS

ATTACH DOCUMENT TEMPLATE

☒ INCLUDE TRANSACTION

TYPE  
Default

Remove all

ATTACH FILE *	FOLDER	SIZE (KB)	LAST MODIFIED	FILE TYPE
INV116782.pdf		87	04/15/2024 2:11 pm	PDF File

✓ Add

✗ Cancel

+ Insert

🗑 Remove

Merge & Send

Cancel

Preview

Submit