



Cash flow management. Solved.

# MANAGE LINKS

## USER GUIDE

# VIEW PAYMENT LINKS SENT

1. Click on DEBT COLLECTION.
2. Click on WEB PAYMENT LINKS.
3. Click on MANAGE LINKS.



# MANAGE LINKS SCREEN

1. Select **RECEIPT BOOK**.
  2. Select the **DATE RANGE**.  
The date defaults to the last 30 days.
  3. Select **LINK STATUS** to search by:
    - **All** – Search all link statuses.
    - **SENT** – The link is active but not yet paid.
    - **PAID** – Successful payment received.
    - **POSTED** – The link is posted to the billing using integration.
    - **DEACTIVATED** – To manually deactivate the link.
- The **REM** column indicates the 72-hour reminder:
- 1 is active
  - 0 is not active

The screenshot shows the 'Manage Links' interface. On the left is a sidebar with buttons: MANAGE WEB LINKS, SHOW LINKS, STOP REMINDERS, DEACTIVATE LINKS, OPEN LINK IN BROWSER, EXPORT EXCEL, and CANCEL. The main area contains a 'RECEIPT BOOK' dropdown (Nexion SA), 'SEARCH CRITERIA' section with 'SENT FROM' (Tuesday, 02 February 202), 'SENT TO' (Thursday, 04 March 202), 'LINK STATUS' (ALL), and 'SEARCH FOR' fields. Below is a table of link records.

ID	REM	STATUS	AMOUNT	ACC & PT.NAME	RESP CODE	RESP TEXT	SENT DATE	PROC
<input checked="" type="checkbox"/>	0	SENT	10.00	123test - C Marcus			2021/03/02 14:17:04	
<input type="checkbox"/>	0	SENT	2000.00	Debichack Tester - 11552			2021/03/01 09:57:59	2021/
<input type="checkbox"/>	0	SENT	10.00	156 - Test			2021/02/27 19:51:40	
<input type="checkbox"/>	0	SENT	10.00	123 - test			2021/02/27 19:41:05	
<input type="checkbox"/>	0	SENT	1500.00	00429 MR N. Botha - 11552			2021/02/26 13:43:41	
<input type="checkbox"/>	0	SENT	15.00	00429 MR N. Botha - 11552			2021/02/26 11:38:50	2021/
<input type="checkbox"/>	0	POSTED	10.00	00429 MR N. Botha - 11552	00	Successful	2021/02/24 13:41:32	2021/
<input type="checkbox"/>	0	POSTED	10.00	00429 MR N. Botha - 11552	00		2021/02/24 10:20:33	2021/
<input type="checkbox"/>	1	PAID	10.00	test - S Miller	00		2021/02/24 09:52:17	2021/
<input type="checkbox"/>	0	SENT	10.00	00429 MR N. Botha - 11552	06	Error	2021/02/24 09:43:12	2021/
<input type="checkbox"/>	1	DEACTIVATED	4500.00	458965 - Miller			2021/02/23 13:04:02	
<input type="checkbox"/>	0	SENT	1000.00	00429 MR N. Botha - 11552			2021/02/23 10:15:36	
<input type="checkbox"/>	0	DEACTIVATED	10000.00	test 1234 - C Marcus			2021/02/22 11:09:05	
<input type="checkbox"/>	0	SENT	1200.00	3455 - Test			2021/02/19 16:44:04	
<input type="checkbox"/>	1	SENT	12.00	2706 - US			2021/02/19 15:25:45	
<input type="checkbox"/>	0	SENT	1.00	00429 MR N. Botha - 1335			2021/02/19 14:53:18	
<input type="checkbox"/>	0	POSTED	2572.20	Medical Orders - Bell	00	Successful	2021/02/19 12:04:48	2021/
<input type="checkbox"/>	0	POSTED	1.00	00429 MR N. Botha - 1335	00	Successful	2021/02/19 10:46:33	2021/
<input type="checkbox"/>	1	SENT	100.00	222 - N Botha			2021/02/19 10:28:09	
<input type="checkbox"/>	1	SENT	100.00	22 - N Botha			2021/02/19 10:09:46	
<input type="checkbox"/>	1	SENT	20.00	222 - N Botha			2021/02/19 09:41:05	

# MANAGE LINKS SCREEN CONTINUED

1. Click on **SHOW LINKS** to view payment links.
2. Tick the box to manage the following:
  - Click on **STOP REMINDERS**
  - Click on **DEACTIVATE LINKS**
3. Highlight the link.  
Click on **OPEN LINK IN BROWSER** to view the payment screen.
4. Click on **EXPORT EXCEL** to export a list of links sent for the selected date range.

The screenshot shows the 'Manage Links' window with the following elements:

- 1**: Points to the 'SHOW LINKS' button in the top left sidebar.
- 2**: Points to the 'STOP REMINDERS' and 'DEACTIVATE LINKS' buttons in the sidebar.
- 3**: Points to the 'OPEN LINK IN BROWSER' button in the sidebar.
- 4**: Points to the 'EXPORT EXCEL' button in the sidebar.

The main area contains a table with the following columns: REM, STATUS, AMOUNT, ACC & PT.NAME, RESP CODE, RESP TEXT, SENT DATE, and PROC. The first row is highlighted in blue and has a checked checkbox in the REM column.

REM	STATUS	AMOUNT	ACC & PT.NAME	RESP CODE	RESP TEXT	SENT DATE	PROC
<input checked="" type="checkbox"/>	SENT	10.00	123test - C Marcus			2021/03/02 14:17:04	
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<input type="checkbox"/>	DEACTIVATED	10000.00	test 1234 - C Marcus			2021/02/22 11:09:05	
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