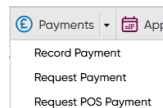


Payment Link - Advance payment

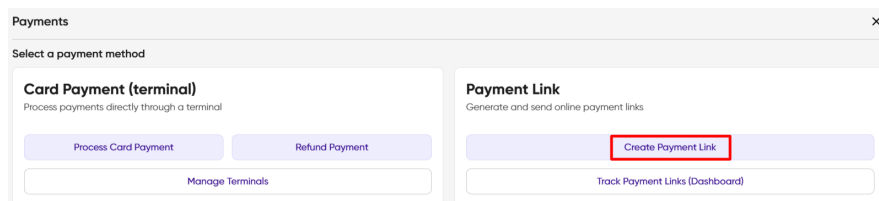
18/12/2025 9:58 am GMT

Creating an online payment link for an advance payment

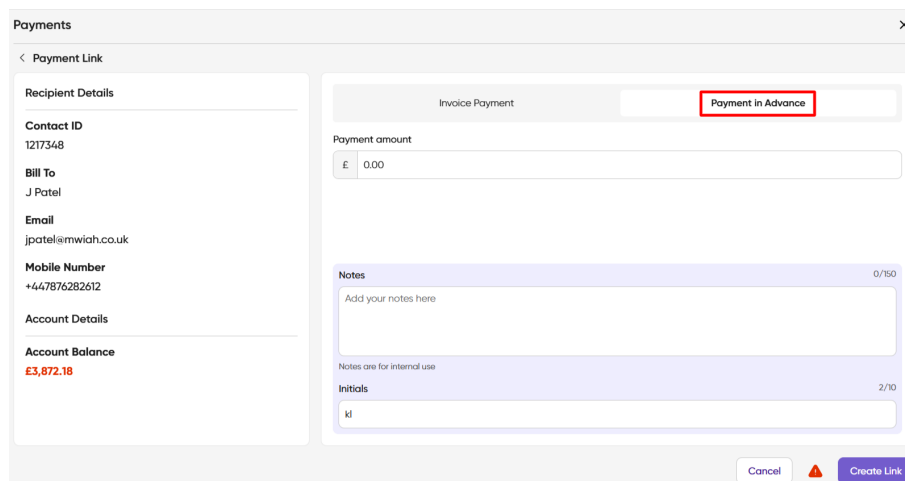
1. Once in a Merlin client record, click on the dropdown arrow at the side of the payments button. A new dropdown menu will appear.
2. Select Request Payment.



3. You are then presented with the Payment screen. Select the Create Payment Link on the right-hand side.



4. You are presented with the Payments window, select Payment in Advance:-



5. The customer details will show, including their registered email address and mobile number.

Recipient Details

Contact ID
15568

Bill To
John Adams

Email
a@a.com

Mobile Number
+447800000000

Account Details

Outstanding Account Balance

6. Enter the required payment amount, any notes and your initials then select Create Link

Invoice Payment

Payment in Advance

Payment amount

£ 100.00

Notes

21/150

Deposit for procedure

Notes are for internal use

Initials

2/10

kl

Cancel

Create Link

7. You are now presented with the following page, showing the Payment Link. Select an Email template and/or an SMS template and click Send Email and/or Send SMS.

Payments

Payment Link

Client Name

Client Mobile Number

Payment Amount

Payment Link

John Adams

+447800000000

£100.00

https://payments-public-service-uat-euw-mwivetspace.cloud/links/8nYuO5m6cDI

Send via Email

Email

Email Template

a@a.com

Online Payment Email Template.docx

Send Email

Send via SMS

SMS Template

Select a template

Send SMS

Go back

Close

8. You will see a green acknowledgement flag when the email/sms has been sent.

Email sent

Send Email

SMS sent

Send SMS

9. Details of your payment links show on the dashboard accessed via the Payment screen (shown below).

Payments

Select a payment method

Card Payment (terminal)

Process payments directly through a terminal

Process Card Payment

Refund Payment

Manage Terminals

Payment Link

Generate and send online payment links

Create Payment Link

Track Payment Links (Dashboard)

Payments

Payment Links Dashboard

Customer Name

J Patel

Site

All

Status ?

All

Date	Amount	Customer Name	Requested By	Invoice No.	Type	Status	
18/12/25	£100.00	J Patel	kl	-	Advance payment	Unpaid	🔗
18/12/25	£10.00	J Patel	kl	# 1009647 ⁺¹	Invoice payment	Unpaid	🔗
16/12/25	£4,959.76	J Patel	jp	# 1009673 ⁺²¹	Invoice payment	Unpaid	🔗
16/12/25	£1,051.80	J Patel	jp	# 1009675	Invoice payment	Paid	
16/12/25	£658.00	J Patel	jp	# 1009676	Invoice payment	Paid	

10. You have the option of viewing the current customer or All Customers, a choice of Sites and also the status of the sent payment links.

Customer Name

John Adams

Site

All

Status ?

All

11. Finally there are two symbols to the right-hand side which allows the user to copy the link or delete the link as required.