



Fortis Payments for NetSuite

User Guide

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Revision History

Document & Version	Revision Date	Revision Description	Revision Author
1.0	September 27, 2024	Changed Support Number	Arjune Selvarajan

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Introduction

This user guide contains step-by-step instructions on how to install and configure the Fortis Payments for NetSuite Application. This guide is broken down into three sections.

1. The **Fortis Payments for NetSuite Installation Guide** contains instructions to download, install and enable the Fortis Payments for NetSuite SuiteApp.
2. The **Fortis Payments for NetSuite Configuration Guide** contains instructions on how to configure the Fortis Payments for NetSuite SuiteApp.
3. The **Fortis Payments for NetSuite Feature Walkthrough** contains instructions on how to use the Fortis Payments for NetSuite SuiteApp to process payment transactions.

Fortis Integration Support

For any issues or concerns regarding payment processing within your NetSuite product, our dedicated team of integration experts are here to review and address your concerns Monday to Friday, from 8am to 8pm EST.

Fortis Customer Service 855-465-9999

Fortis Payments for NetSuite Installation Guide

Important

Please check with your Fortis Client Rep that you have been provisioned access to the “Managed Bundle” prior to attempting the install.

SuiteApp Prerequisites

The following features are required to be enabled in order to successfully install the SuiteApp.

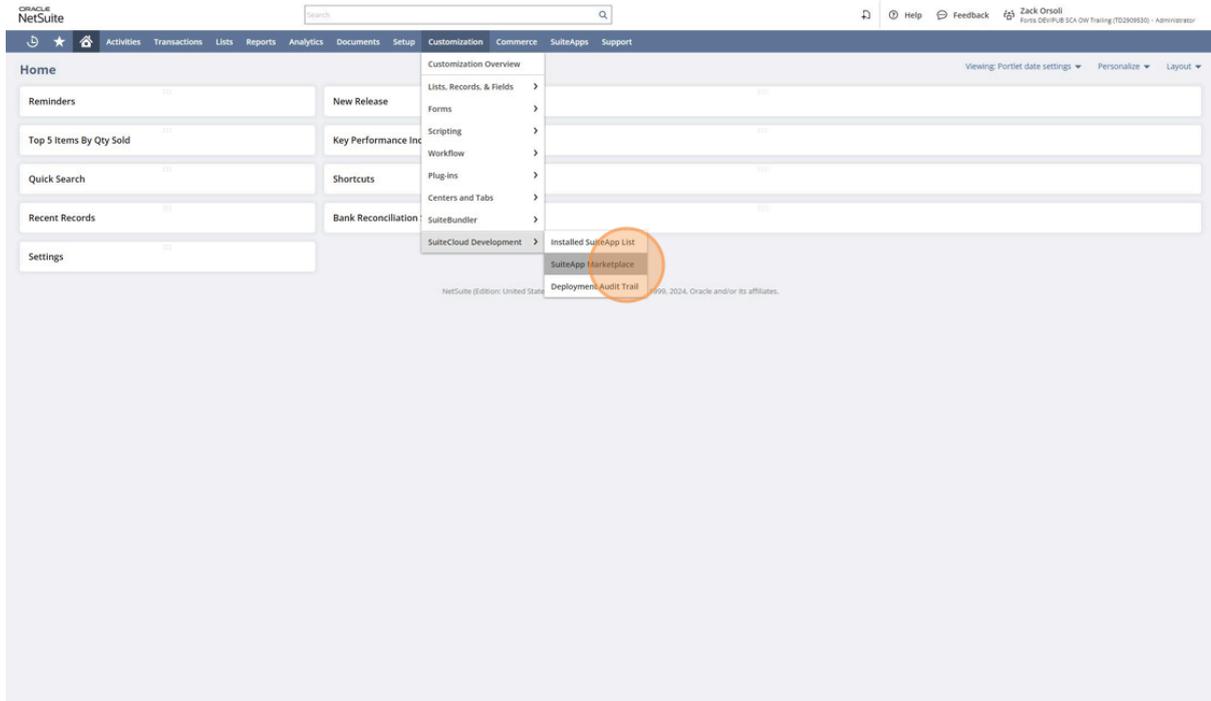
- Payment Instruments
- Server SuiteScript
- Custom Records
- Credit Card Payments

Important

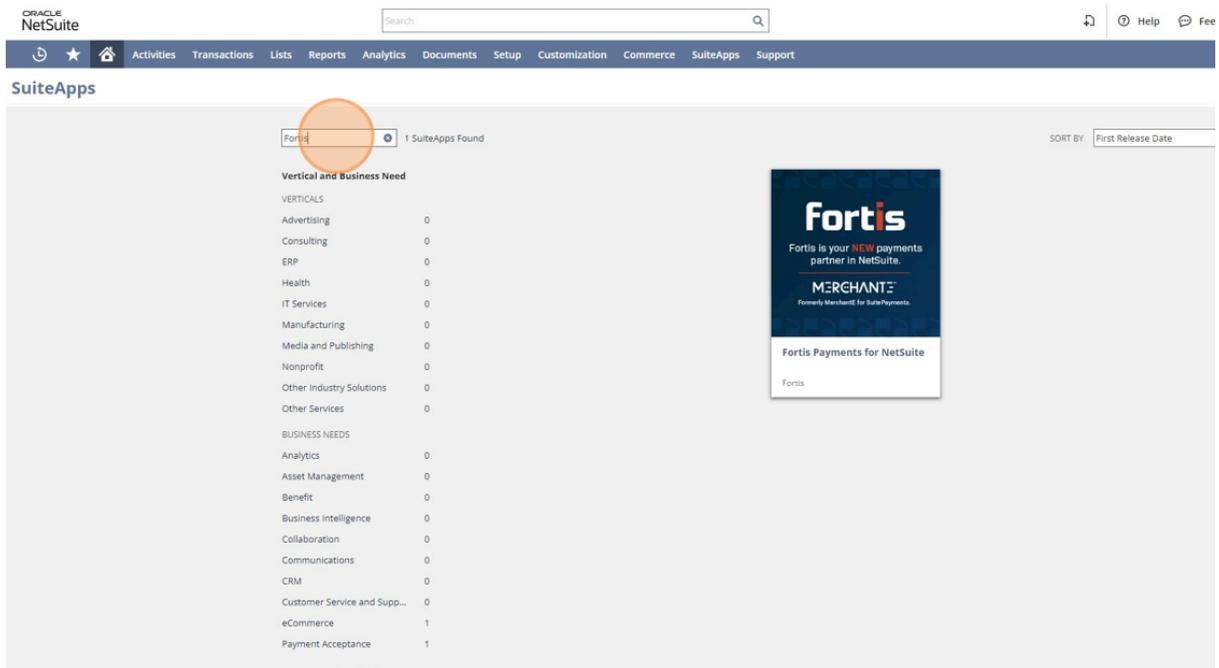
These features can be enabled in NetSuite by Navigating to **Setup > Company > Enable Features**. Check with your NetSuite administrator to see if these features have already been enabled or required to be enabled in your NetSuite account.

Install the Fortis Payments for NetSuite SuiteApp

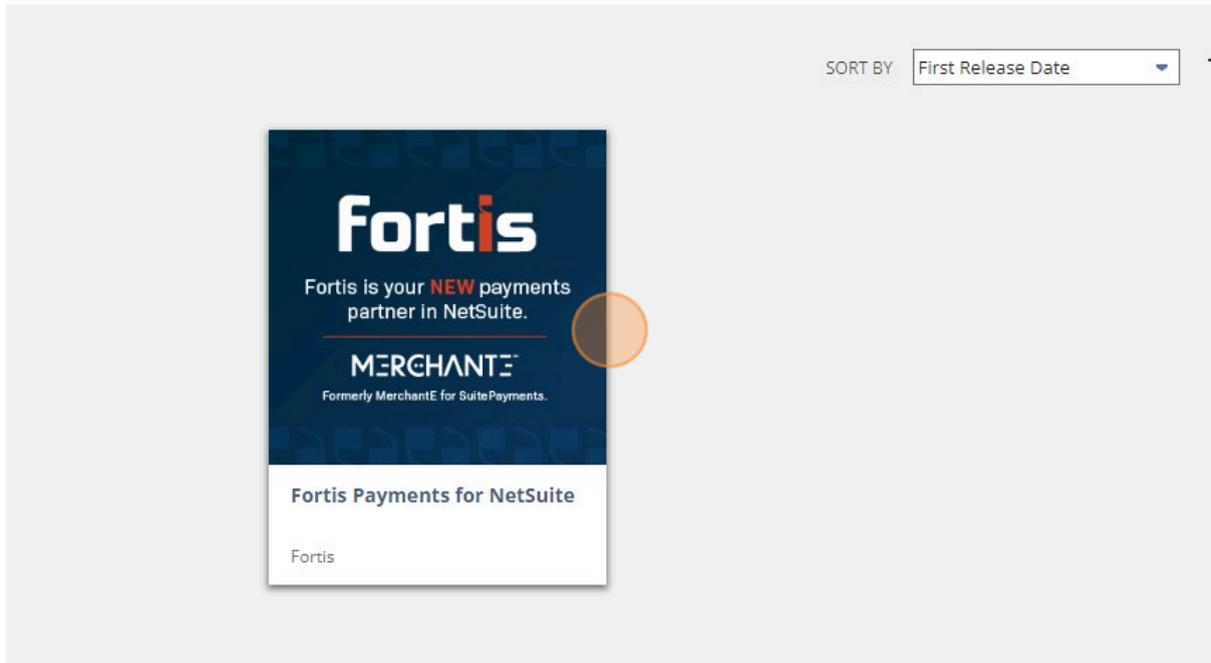
1. Navigate to NetSuite home screen
2. Go to **Customization > SuiteCloud Development > SuiteApp Marketplace**



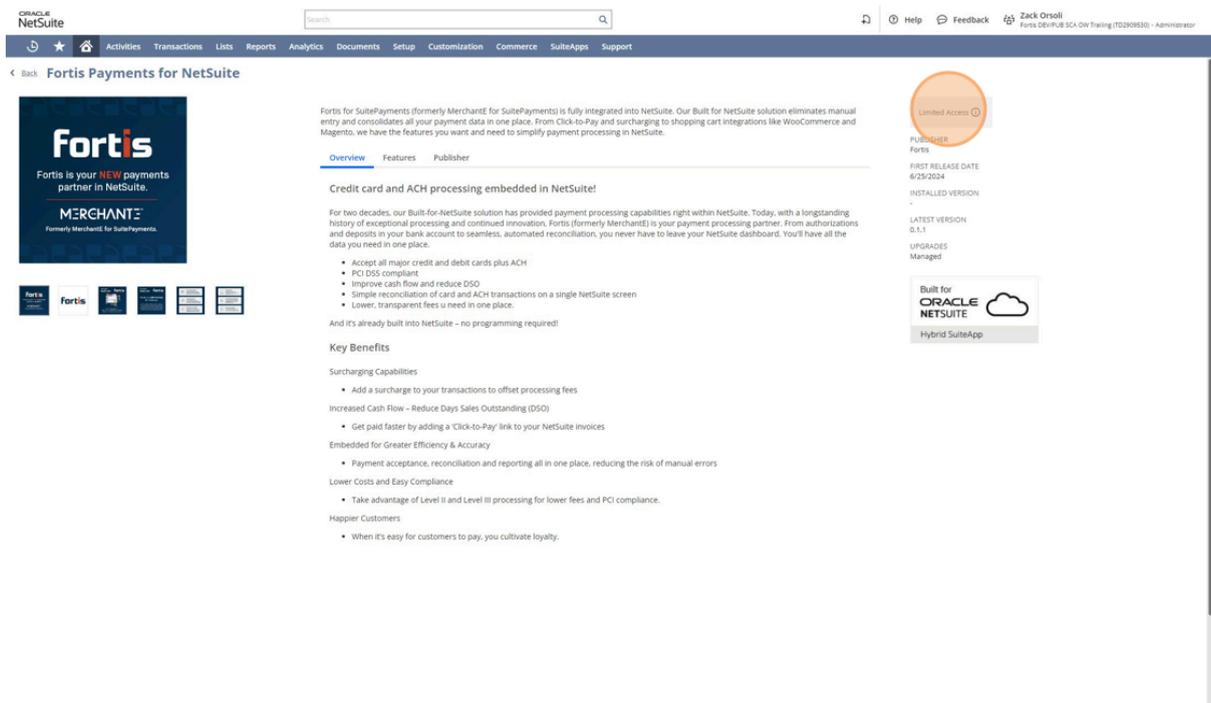
3. Search for "Fortis"



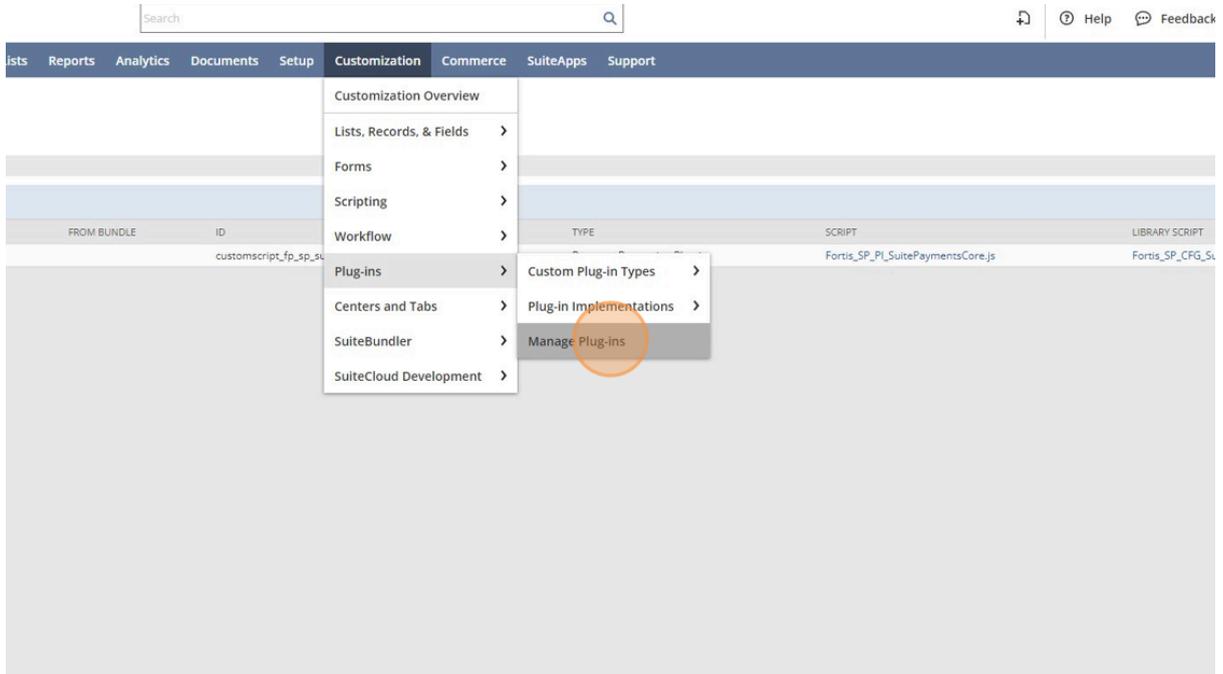
4. Click the Application card "Fortis Payments for NetSuite"



5. Click the Install button on the Fortis Application page



6. Go to Customizations > Plugins > Manage Plug-ins



7. Enable the "FORTIS Payments for NetSuite PLUG-IN" checkbox

Plug-ins are generally designed to modify or supplement NetSuite business logic. When you enable a plug-in, standardize your account before enabling a plug-in and ensure that use of the plug-in meets all of your security, regulatory, and other com

Manage Plug-In Implementations

Save Cancel

Payment Processing

IMPLEMENTATIONS

FORTIS SUITEPAYMENTS PLUG-IN

8. Save the record

NetSuite

Activities Transactions Lists Reports Analytics Documents Setup Customization

WARNING
Plug-ins are generally designed to modify or supplement NetSuite business logic. When you enable a plug-in, standard NetSuite business logic is overridden. You should review the plug-in documentation and test the plug-in in a test account before enabling a plug-in and ensure that use of the plug-in meets all of your security, regulatory, and other compliance requirements.

Manage Plug-In Implementations

Save Cancel

Payment Processing

IMPLEMENTATIONS

FORTIS SUITEPAYMENTS PLUG-IN

Fortis Payments for NetSuite Configuration Guide

i Important

This section will be handled on your initial onboarding call with a Fortis representative.

Obtain Fortis Credentials for NetSuite (Fortis Portal)

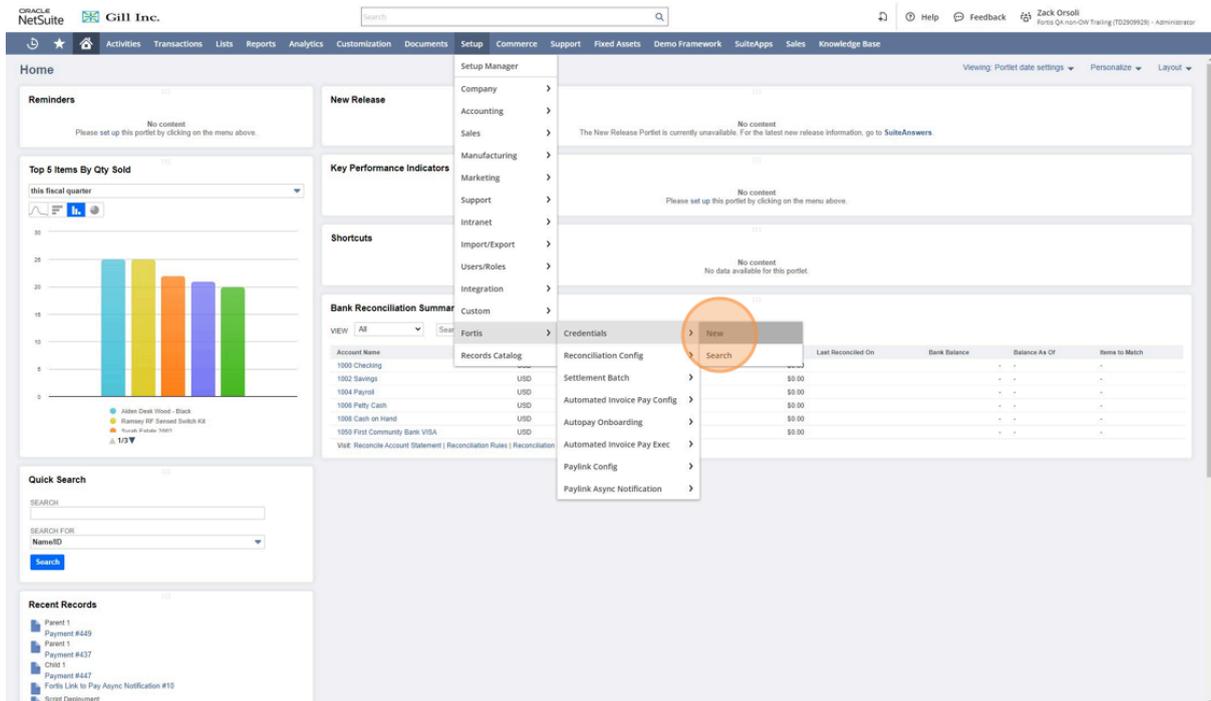
1. Navigate to the Fortis Portal located here - <https://portal.fortis.tech>
2. Login to the portal - credentials will be provided by the Fortis team
3. Navigate to User Management on the Menu
 - a. Click on the Name of the Primary User
 - b. Scroll down to the bottom and **Enable Advanced Settings**

- c. Click on Generate API Key
 - i. Copy and Paste the Key on a Notes App, it will need to be entered in on the next step in NetSuite

Note: Copy the ID in the top section should be copied and saved with the API key in a Notes App.

Fortis Credentials Setup (NetSuite)

1. Login into your NetSuite account, navigate to your Netsuite home screen
2. Hover **Setup > Fortis > Credentials**, then click **New**



3. Enter a name for the record



Fortis Credentials

Info

NAME *

INACTIVE

TOP-LEVEL LOCATION ID

TOKEN SHARE ERRORS

TITLE	MEM
<input type="text"/>	

4. Select the environment to use, enter the User ID and User API Key provided by Fortis

Credentials

ENVIRONMENT *

USER ID *

USER API KEY (UNENCRYPTED)

DATE	TIME	TYPE
7/16/2024	11:41 am	

6. Save the record to create

ORACLE NetSuite Search

Activities Transactions Lists Reports Analytics Customization Documents Setup

Fortis Credentials

Save Cancel Manage Terminals

Info

NAME *
SB Credentials Record

INACTIVE

TOP-LEVEL LOCATION ID

TOKEN SHARE ERRORS

Remove all

TITLE	MEM
-------	-----

Create Payment Methods (NetSuite)

Users must set up a payment method and link it to the corresponding payment processing profile they wish to use for processing payments. If this is not done, it may result in NetSuite user configuration errors, or the payment processing profile may not be properly applied when saving transactions.

To setup a payment method in NetSuite to use with Fortis Payments Plugin, navigate to **Setup > Accounting > Accounting Lists** and set the filter to “**Payment Method**”.

Note

The Fortis Payments for NetSuite Application supports the following Payment Methods, depending on your use case, each of these should be configured independently.

1. **Payment Cards (Payment Card)** - an online payment method for common card

processing. The method supports both Mail Order / Telephone Order (MOTO) and e-commerce payments.

2. **Payment Card Token (Payment Card Token)** - an online payment method for card processing with tokenization. The method processes tokens instead of payment cards.
3. **ACH Token (General Token)** - an online payment method that requires the Payment Instruments feature to be enabled. The method requires a token that was issued by a payment gateway and does not represent a payment card. The General Token payment instrument, only works with the General Token payment method.
4. **Pay by Reference (Pay by Reference)** - an online payment method that requires the Payment Instruments feature. The method uses a reference issued by a payment gateway integration to perform a follow-up operation. Certain integrations do not share tokens, but can share a transaction reference.
5. **Fortis Paylinks (External Checkout)** - an online payment method used in E-Commerce. The shopper needs to be redirected to an external payment provider's page to authorize the payment.
6. ACH (ACH)
7. **Terminal (EMV)** - an online payment method that is specific to the EMV Chip and PIN flow for point of sale (POS) solutions.

Creating a new payment Method (General Setup)

- 1) Click **New** on the Accounting Lists Screen
- 2) **Give the Payment Method a Name**
 - a) Some example naming conventions depending on the payment method you are setting up based on your company needs, refer to the list above for the supported payment methods

- i) Payment Cards Names:**
 - (1) American Express
 - (2) Discover
 - (3) MasterCard
 - (4) Visa

- ii) Payment Card Token Name:**
 - (1) Fortis Payment Card Token

- iii) ACH Token Name:**
 - (1) Fortis ACH Name:

- iv) Pay By Reference:**
 - (1) Fortis Pay by Reference

- v) External Checkout Name:**
 - (1) Fortis PayLink

3) Select the Payment Type

- a) The options are
 - i) EMV
 - ii) External Checkout
 - iii) General Token
 - iv) Offline
 - v) Pay By Reference
 - vi) Payment Card
 - vii) Payment Token

Select the payment type based on the payment method you are setting up, refer to the important note section above for reference.

4) Requires Line-Level Data Checkbox

- a) You do not need to check this box on the payment type, it will need to be checked on the Payment Processing Profile.

5) Associated Payment Processing Profile

- a) This field lists the merchant accounts that support this payment method.

i Note:

If you have not created the Fortis Payment Processing Profile yet, it will not appear on this list, but you can associate the newly created payment methods at the profile creation stage.

6) Display in Website (Optional based on Payment Method)

- a) Check this checkbox to use this payment method for a SuiteCommerce Website, or NetSuite's Payment Link feature.

i Note:

You must also set up payment visuals for the Payment Method to show up in the SuiteCommerce website, SCIS and Payment Links.

For more information on the naming conventions for Payment Methods and the correct path for Payment Visuals please refer to the following Oracle NetSuite article - https://docs.oracle.com/en/cloud/saas/netsuite/ns-online-help/section_N1292421.html#bridgehead_4291042820

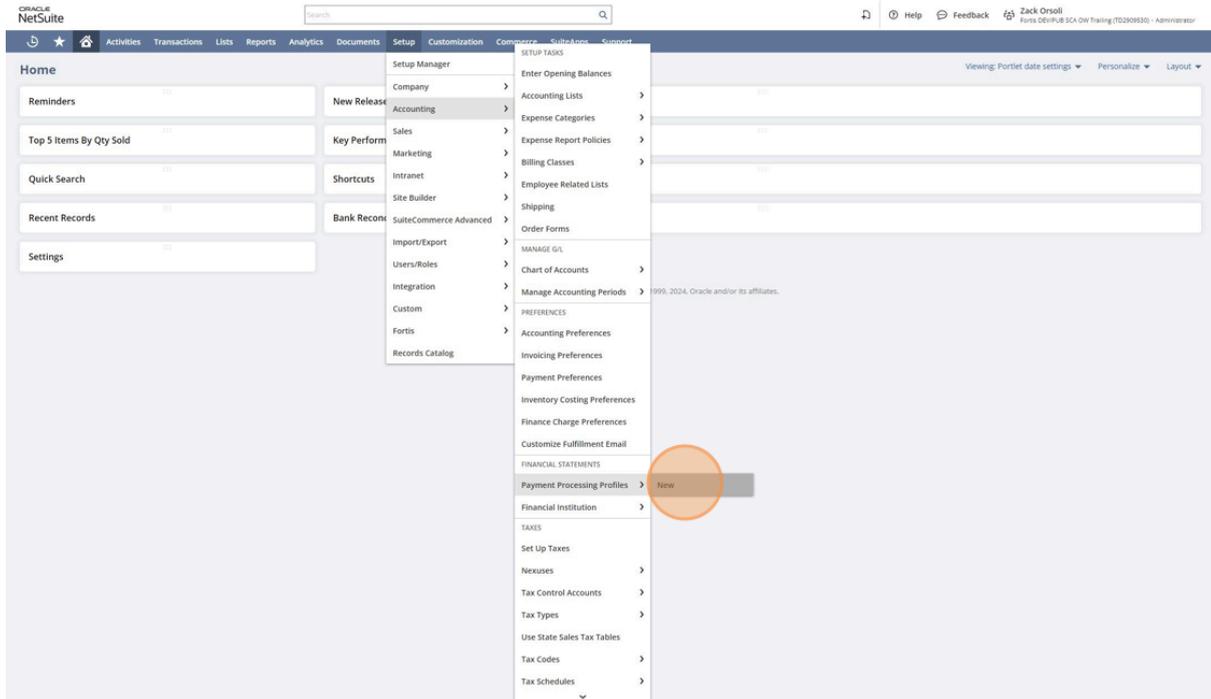
Create Fortis Payment Processing Profile (NetSuite)

The Payment Processing Profile (PPP) found in NetSuite is the main configuration profile that links the profile back to Fortis Merchant Portal with the Fortis token you had generated in the very beginning of this guide.

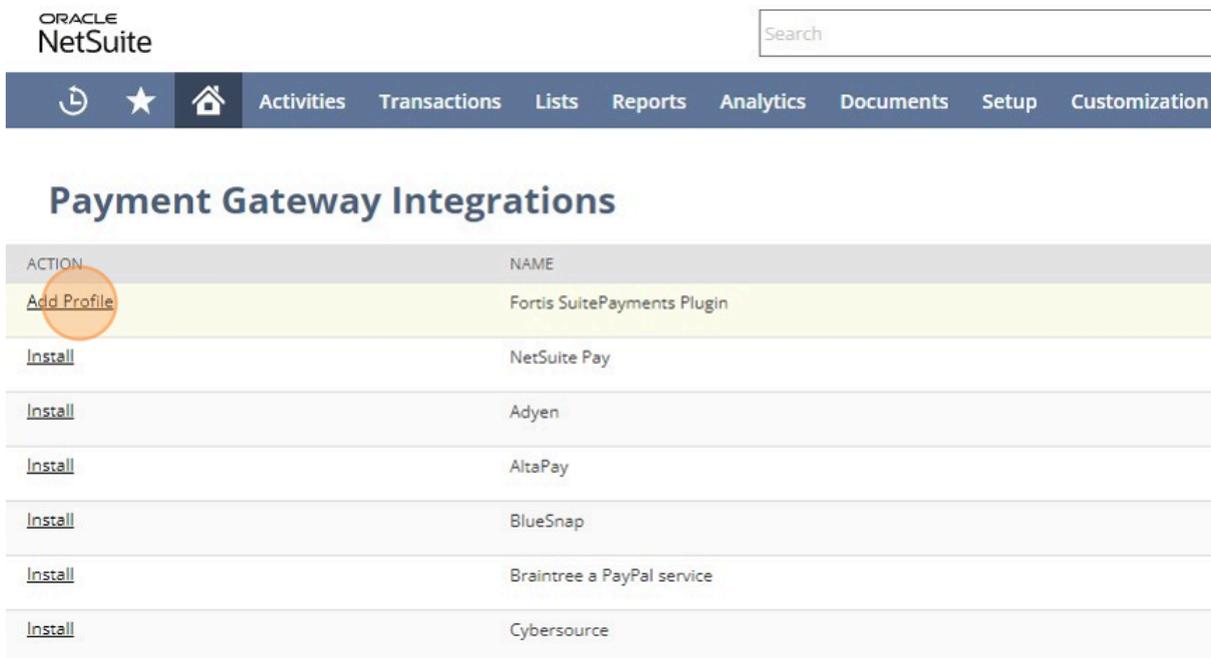
How to Set Up The Fortis Payment Processing Profile (PPP)

Creating the Payment Processing Profile (PPP)

1. Navigate to NetSuite Home Screen
2. Hover **Setup > Accounting > Payment Processing Profile**, then click **New**



3. Click **"Add Profile"** for Fortis **Payments for NetSuite** Plugin



4. Enter a name for the Profile

Primary

WEB SITE

Demo Site
Demo: Blank US OneWorld Account
SCIS

NAME *

SUBSIDIARY *

SETTLEMENT CURRENCY

USA

CHARGE CURRENCIES *

British pound
Canadian Dollar
Euro
USA

5. Select a Subsidiary

SCIS

NAME *

SB Demo Profile

SUBSIDIARY *

Parent Company
Test Julius Canada Sub CAD Currency
Test USA Sub USD Currency
Canadian Dollar
Euro
USA

SETTLEMENT BANK ACCOUNT

SUPPORT LINE-LEVEL DATA

6. Select a Settlement Bank Account

Canadian Dollar

Euro

USA

SETTLEMENT BANK ACCOUNT

- Cash Drawer (Julius Lin, 1)
- Cash Drawer (Julius Lin, 1)
- Cash Drawer (Michael Sumulong, 1)
- Cash Drawer (SCIS 1, 1)
- Checking
- Payroll
- Petty Cash
- Savings

FORTIS CREDENTIAL *

ENVIRONMENT

LOCATION NAME

7. To Provide line-level data to Fortis

01. Check the SUPPORT LINE-LEVEL DATA checkbox
02. If you choose to turn on support line-level-data setting with the Payment Processing Profile
03. Future transactions will now automatically send line-level data to Fortis - if your account at Fortis is setup to accept line-level data. If you have questions regarding enabling line-level data on the Fortis Portal, please contact your Fortis Customer Agent.

8. Select the Fortis Credentials to be used for this profile

INACTIVE

Authentication Credentials

Fortis Pay Profile Extension

FORTIS CREDENTIAL *

CC PROCESSING ACCOUNT ID

ACH PROCESSING ACCOUNT NAME

9. Click **"List Locations"**. If there is only one location for the credentials selected, it will auto select the location. If there are multiple locations, a pop-up will open in order to select the location to be used.

Fortis Pay Profile Extension

FORTIS CREDENTIAL *

SB Demo

ENVIRONMENT

Sandbox

LOCATION NAME

LOCATION ID

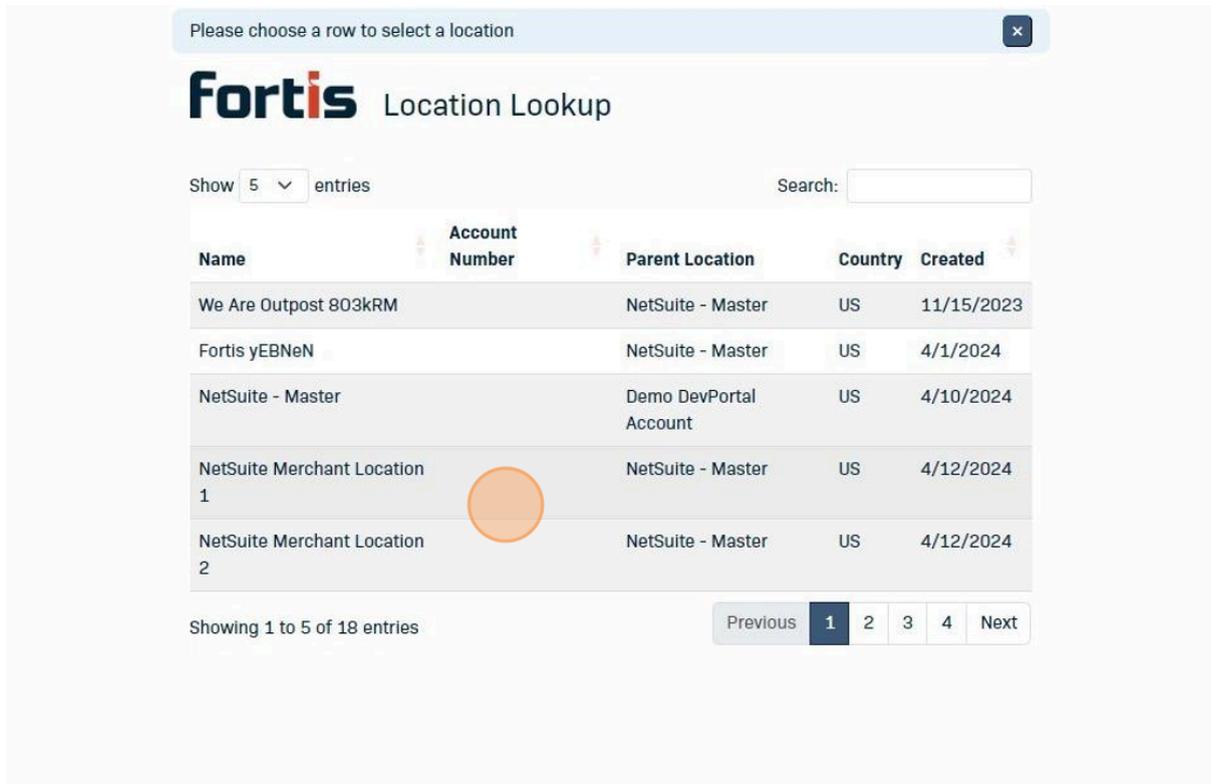
CC PROCESSING ACCOUNT NAME

CC PROCESSING ACCOUNT ID

ACH PROCESSING ACCOUNT NAME

ACH PROCESSING ACCOUNT ID

10. The location popup will look similar to this.



11. Click **"List CC Account Ids"**. If there is only one cc account for the location selected, it will auto select the account. If there are multiple cc accounts, a pop-up will open in order to select the account to be used.

SB Demo ▾

ENVIRONMENT
Sandbox

LOCATION NAME
NetSuite Merchant Location 1

LOCATION ID
11eef8e12652f148a4398548

List Locations Clear

CC PROCESSING ACCOUNT NAME

CC PROCESSING ACCOUNT ID

List CC Account Ids Clear

ACH PROCESSING ACCOUNT NAME

ACH PROCESSING ACCOUNT ID

List ACH Account Ids Clear

SEND ERROR NOTIFICATIONS TO
_____ ▾

12. Click **"List ACH Account Ids"**. If there is only one ach account for the location selected, it will auto select the account. If there are multiple ach accounts, a pop-up will open in order to select the account to be used.

SB Demo ▾

ENVIRONMENT
Sandbox

LOCATION NAME
NetSuite Merchant Location 1

LOCATION ID
11eef8e12652f148a4398548

List Locations Clear

CC PROCESSING ACCOUNT NAME
NetSuite Merchant 1

CC PROCESSING ACCOUNT ID
11eef8e18d9cc8569c9e2612

List CC Account Ids Clear

ACH PROCESSING ACCOUNT NAME

ACH PROCESSING ACCOUNT ID

List ACH Account Ids Clear

SEND ERROR NOTIFICATIONS TO
▾

13. Surcharge options are covered in the surcharge setup section in a separate part of this document.

14. Enable Tokenization for ACH and Pay link if desired. The fields on the bottom of the record will also need to be configured

Surcharge Options

When configuring the surcharge item, ensure it is set up as a non-taxable item. An incorrect setup could result in the surcharge amount being inaccurately reflected in N

ENABLE SURCHARGE

SURCHARGE ITEM

BACKUP NON-TAXABLE TAX CODE

Tokenize during Payment Options

In order for tokenization during payments to work, please make sure to provide the standard NetSuite Tokenization section at the end of this form

TOKENIZE ACH

TOKENIZE PAYLINK TRANSACTION

ACH Options

DEFAULT ACH SEC CODE

Elements Options

[Open Fortis Elements Config](#)

Postback Configuration

After saving the PPP, a Map/Reduce script will run and attempt to register your PPP for postback notifications from Fortis. If you are using ACH or Paylink features, it is ir

15. Select a default ACH SEC CODE if needed

BACKUP NON-TAXABLE TAX CODE

Tokenize during Payment Options

In order for tokenization during payments to work, please make sure to provide the standard NetSuite Tokenization section at the end of this form

TOKENIZE ACH

TOKENIZE PAYLINK TRANSACTION

ACH Options

DEFAULT ACH SEC CODE

 +

Elements Options

[Open Fortis Elements Config](#)

Postback Configuration

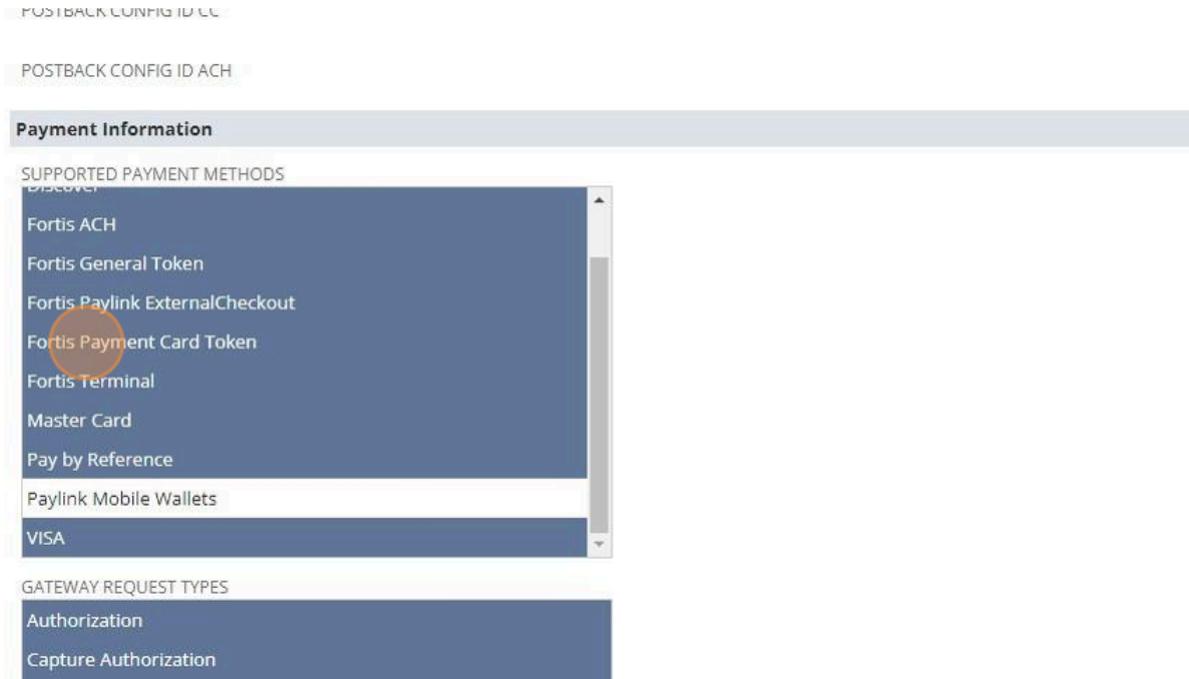
After saving the PPP, a Map/Reduce script will run and attempt to register your PPP for postback notifications from Fortis. If you are using ACH or Paylink features, it is ir

POSTBACK CONFIG ID CC

POSTBACK CONFIG ID ACH

Payment Information

16. Select the necessary Payment Methods



17. Select the necessary Payment Request Types



18. To enable tokenization, enable "REPLACE PAYMENT CARD BY TOKEN"

Capture Authorization

Credit

Refund

Sale

Void Authorization

Tokenization REPLACE PAYMENT CARD BY TOKEN

PAYMENT CARD TOKEN PAYMENT METHOD

GENERAL TOKEN PAYMENT METHOD

Save

Cancel

19. For Payment Card tokenization, select the Payment Card Token payment method. If not available, the payment method needs to be created

Capture Authorization

Credit

Refund

Sale

Void Authorization

Tokenization REPLACE PAYMENT CARD BY TOKEN

PAYMENT CARD TOKEN PAYMENT METHOD

Save

Cancel

20. For ACH tokenization, select the General Token payment method. If not available, the payment method needs to be created

Capture Authorization

- Credit
- Refund
- Sale
- Void Authorization

Tokenization

REPLACE PAYMENT CARD BY TOKEN

PAYMENT CARD TOKEN PAYMENT METHOD
Fortis Payment Card Token

GENERAL TOKEN PAYMENT METHOD
Fortis General Token

Save Cancel

21. Save the Payment Processing Profile

Capture Authorization

- Credit
- Refund
- Sale
- Void Authorization

Tokenization

REPLACE PAYMENT CARD BY TOKEN

PAYMENT CARD TOKEN PAYMENT METHOD
Fortis Payment Card Token

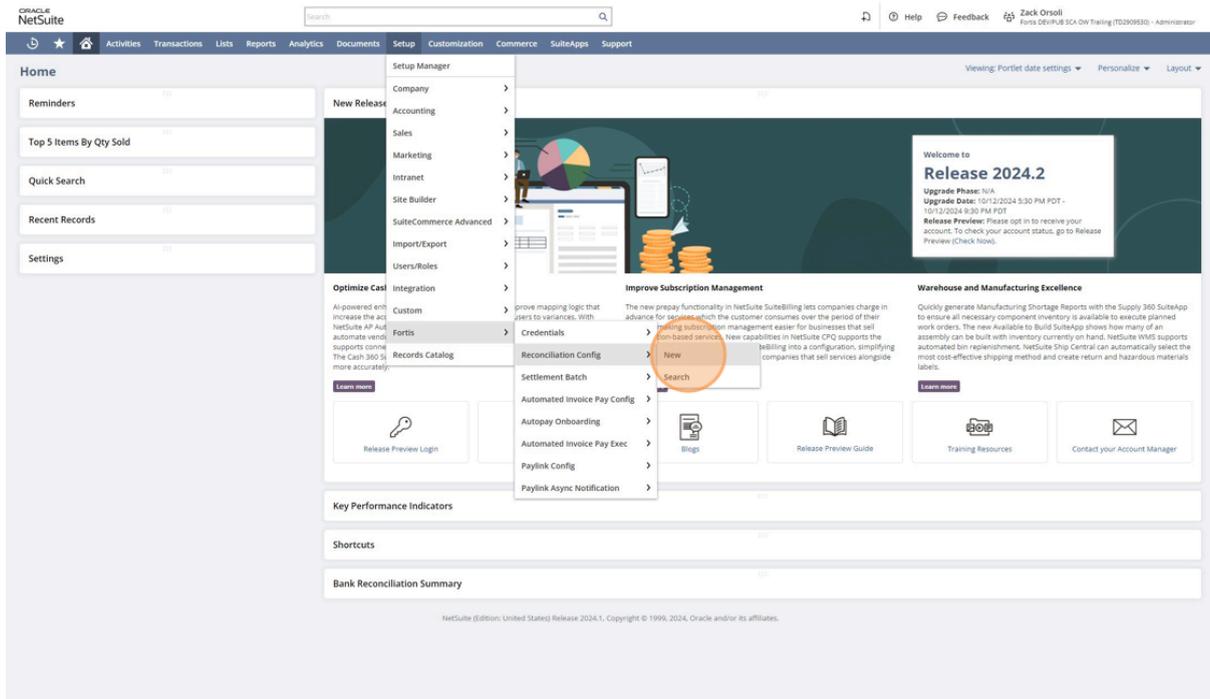
GENERAL TOKEN PAYMENT METHOD
Fortis General Token

Save Cancel

Fortis Settlement Reconciliation Config (NetSuite)

The Fortis reconciliation configuration needs to be setup to reconcile the Fortis accounts back to NetSuite, if you have multiple Fortis merchant accounts that you need to reconcile you will need to create a separate configuration profile for each account.

1. Navigate to NetSuite home page
2. Navigate to **Setup > Fortis > Reconciliation Config > New**



3. Select the Credentials to be used

Fortis Settlement Reconciliation Config

INACTIVE

CREDENTIALS *

MS Creds SB

Parent API KEYS

SB Demo

Test Credential

Test Julius New(TAGS)

Token Share Test

Zack 3

PRODUCT TRANSACTIONS

TARGET START DATE

TARGET END DATE

TITLE

MEMO *

4. Click "List Locations" to open a popup to select a location.

If only 1 location exists it will be selected automatically

Fortis Settlement Reconciliation Config

INACTIVE

CREDENTIALS *

SB Demo

LOCATION ID

LOCATION NAME

PRODUCT TRANSACTIONS

TARGET START DATE

TARGET END DATE

Notes Files

TITLE

MEMO *

5. Click "List Product Transactions" to open a popup to select a Product Transaction.

If only 1 product transaction exists it will be selected automatically.

Search

Lists Reports Analytics Documents **Setup** Customization Commerce SuiteApps Support

Config

PRODUCT TRANSACTION ID	PRODUCT TRANSACTION NAME
<input type="text"/>	<input type="text"/>
<input type="button" value="List Product Transactions"/>	
<input type="button" value="Reset"/>	
TARGET START DATE	<input type="text"/>
TARGET END DATE	<input type="text"/>

6. Select the desired product transaction from the popup.

If reconciliation is needed for multiple, a new config will need to be created for each.

Please choose a row to select an account

Fortis Account Lookup NetSuite Merchant Location 1

Show entries Search:

Account ID	Account Name	Account Type
11eef8e15fffb3a9dc00278	Netsuite Merchant 1	ach
11eef8e18d9cc8569c9e2612	NetSuite Merchant 1	cc

Showing 1 to 2 of 2 entries

7. Enter a Start Date

PRODUCT TRANSACTION ID: 11eef8e18d9cc8569c9e26
PRODUCT TRANSACTION NAME: NetSuite Merchant 1

List Product Transactions
Reset

TARGET START DATE:

TARGET END DATE:

MEMO:

DATE: 7/18/2024

8. Enter an End Date. Must be within 7 days of the start date.

List Product Transactions
Reset

TARGET START DATE: 7/1/2024

TARGET END DATE:

MEMO:

DATE: 7/18/2024

9. Save the Config Record

ORACLE NetSuite

Search

Activities Transactions Lists Reports Analytics Documents Setup Customization

Fortis Settlement Reconciliation Config

Save Cancel

INACTIVE

CREDENTIALS *
SB Demo

LOCATION ID: 11eef8e12652f148a43985
LOCATION NAME: NetSuite Merchant Locati...

PRODUCT TRANSACTION: 11eef8e18d9cc8569c

TARGET START DATE: 7/1/2024

TARGET END DATE: 7/8/2024

Notes Files

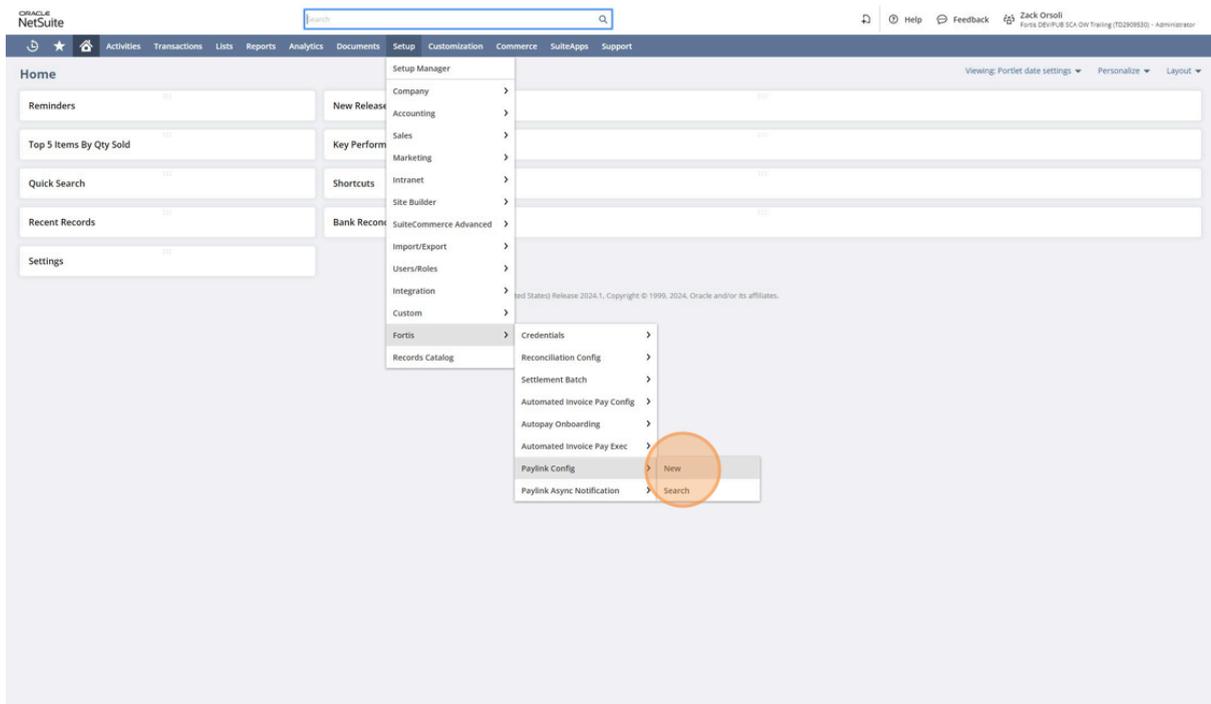
Remove all

Additional Setup Features

Fortis Paylink Configuration (NetSuite)

The Fortis Paylink is an online payment method used in E-Commerce & In situations where you send the customer a direct payment, Fortis Paylinks an invoice or customer deposit. The shopper needs to be redirected to an external payment page to authorize the payment.

1. Navigate to NetSuite home screen
2. Go to **Setup > Fortis > Paylink Config > New**



3. Enter a Name for the Config record

NetSuite Search

Activities Transactions Lists Reports Analytics Documents **Setup** Customization

Fortis Paylink Config

Save Cancel

Main

NAME * INACTIVE

Configurations

FORTIS CREDENTIALS * +

IS DEFAULT

SUBSIDIARY *

SCRIPT ID

PAYMENT PROCESSING

EXTERNAL CHECKOUT F

CUSTOM PAYMENT

4. Select the Fortis Credentials to be used

main

NAME * INACTIVE

Configurations

FORTIS CREDENTIALS *

IS DEFAULT

SUBSIDIARY *

SCRIPT ID

PAYMENT PROCESSING

EXTERNAL CHECKOUT F

CUSTOM PAYMENT

Paylink

PAYLINK LOGO

PAYLINK LOGO WIDTH

5. Enable "IS DEFAULT" if this config should be selected by default for transactions with the selected Subsidiary

Fortis Paylink Config

Main

NAME * INACTIVE

Configurations

FORTIS CREDENTIALS * IS DEFAULT INACTIVE
SUBSIDIARY * INACTIVE
SCRIPT ID

PAYMENT PROCESSING
EXTERNAL CHECKOUT F
 CUSTOM PAYMENT

UI Configurations

PAYLINK TITLE
PAYLINK LOGO

6. Select the Subsidiary

Main

NAME * INACTIVE

Configurations

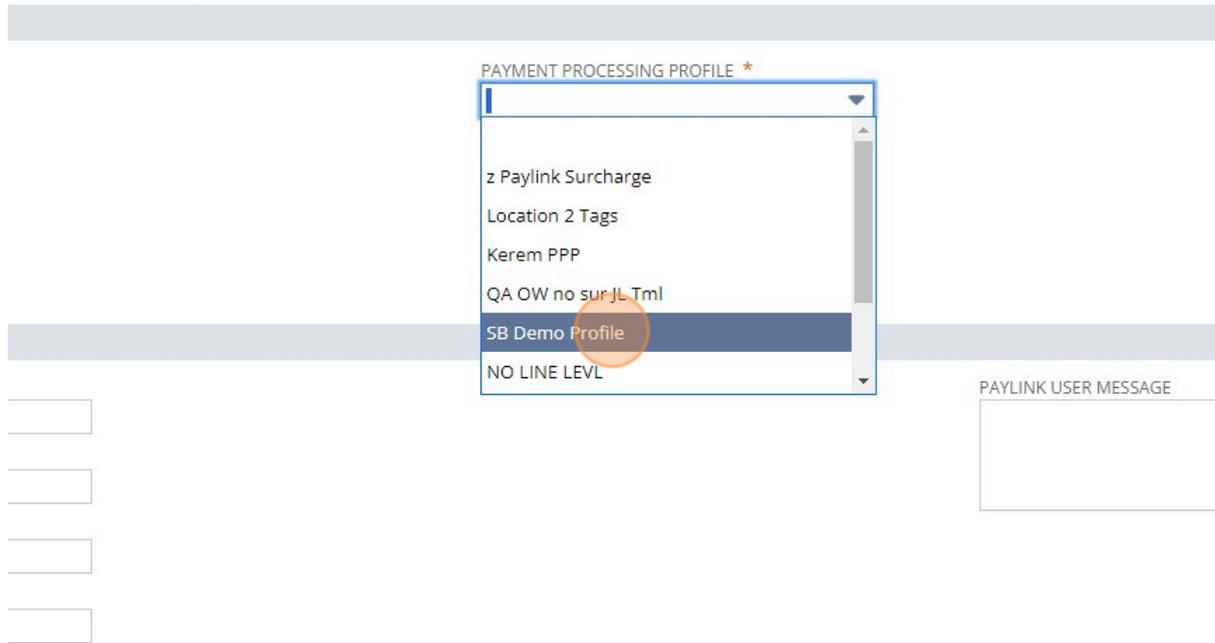
FORTIS CREDENTIALS * IS DEFAULT INACTIVE
SUBSIDIARY * INACTIVE
SCRIPT ID

PAYMENT PROCESSING
EXTERNAL CHECKOUT F
 CUSTOM PAYMENT

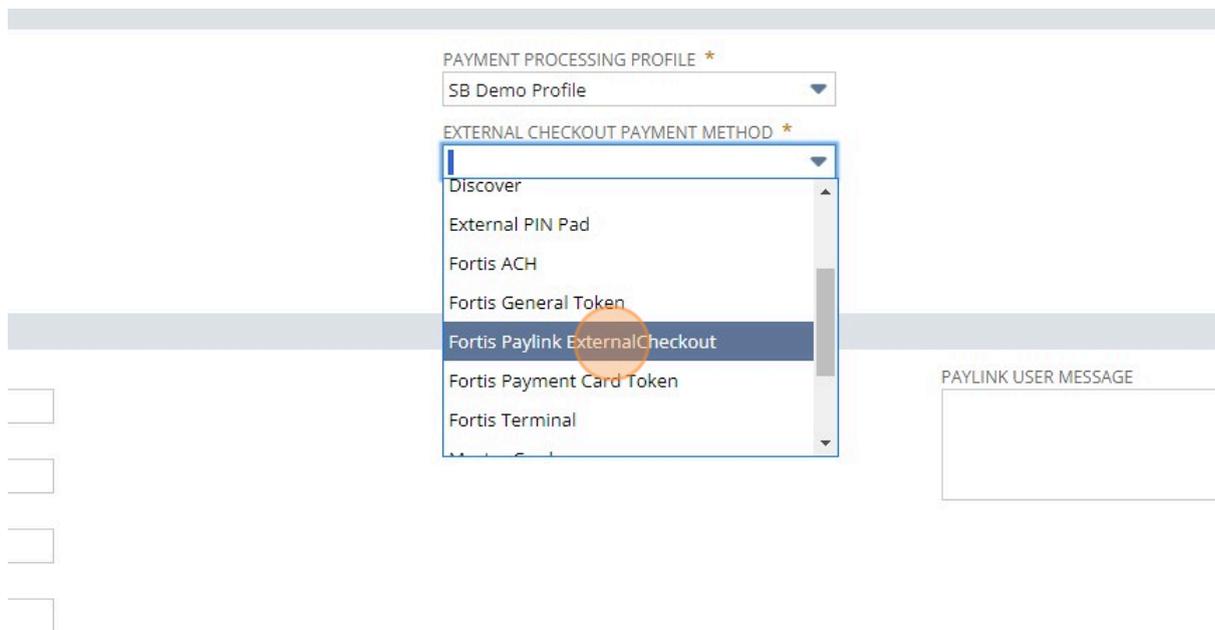
UI Configurations

PAYLINK TITLE
PAYLINK LOGO
PAYLINK LOGO WIDTH

7. Select the Payment Processing Profile to be used



8. Select the External Checkout Payment method. If this payment method is not created, it will need to be created. Using the global Search, enter "Payment Method", then create a new one. The payment method will also need to be enabled on the Payment Processing Profile.



9. Enable "CUSTOM PAYMENT AMOUNT" if partial payments should be enabled

INACTIVE

PAYMENT PROCESSING PROFILE *

SB Demo Profile

EXTERNAL CHECKOUT PAYMENT METHOD *

Fortis Paylink ExternalCheckout

CUSTOM PAYMENT AMOUNT

PAYLINK USER

10. Select how Quotes/Estimates should be converted. No option will default to Invoice.

FORTIS QUOTE CONVERSION LOGIC

- New -

to sales order

to invoice

PAYLINK USER MESSAGE

11. Select how Statement Payments should be prioritized. No option will use NetSuite's Auto Select.

FORTIS QUOTE CONVERSION LOGIC
to invoice

FORTIS STATEMENT APPLY LOGIC

- New -
- Order by Ascending Invoice Date
- Order by Ascending Due Date

PAYLINK USER MESSAGE

12. Paylink UI Configurations can be made at the bottom of the page if needed.

Fortis Paylink Config

Main

NAME *
Demo Paylink Config INACTIVE

Configurations

FORTIS CREDENTIALS * SB Demo	PAYMENT PROCESSING PROFILE * SB Demo Profile	FORTIS QUOTE CONVERSION LOGIC to invoice
<input checked="" type="checkbox"/> IS DEFAULT	EXTERNAL CHECKOUT PAYMENT METHOD * Fortis Paylink ExternalCheckout	FORTIS STATEMENT APPLY LOGIC Order by Ascending Invoice Date
SUBSIDIARY * Parent Company	<input checked="" type="checkbox"/> CUSTOM PAYMENT AMOUNT	
SCRIPT ID <input type="text"/>		

UI Configurations

PAYLINK TITLE Paylink	PAYLINK USER MESSAGE <div style="border: 1px solid #ccc; height: 20px;"></div>
PAYLINK LOGO <input type="text"/>	
PAYLINK LOGO WIDTH <input type="text"/>	
PAYLINK FAVICON URL <input type="text"/>	

13. Save the Record

ORACLE NetSuite

Search

Activities Transactions Lists Reports Analytics Documents Setup Customization

Fortis Paylink Config

Save Cancel

Main

NAME * INACTIVE

Configurations

FORTIS CREDENTIALS *

IS DEFAULT

SUBSIDIARY *

SCRIPT ID

PAYMENT PROCESSING

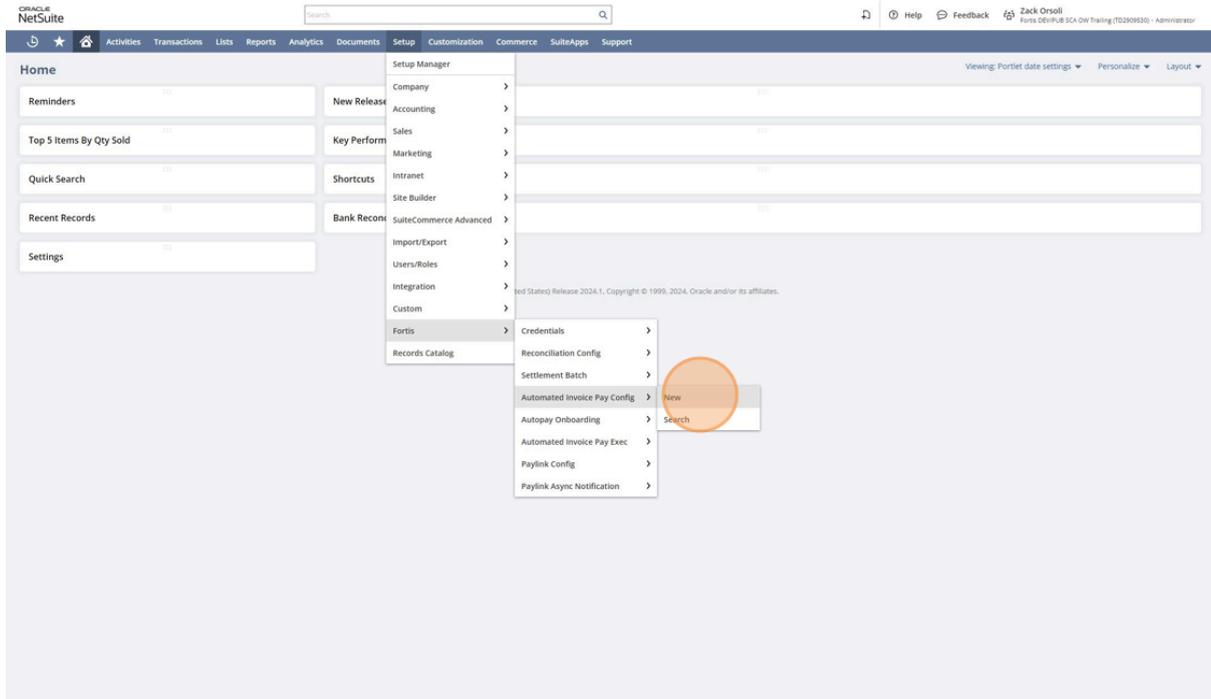
EXTERNAL CHECKOUT F

CUSTOM PAYMENT

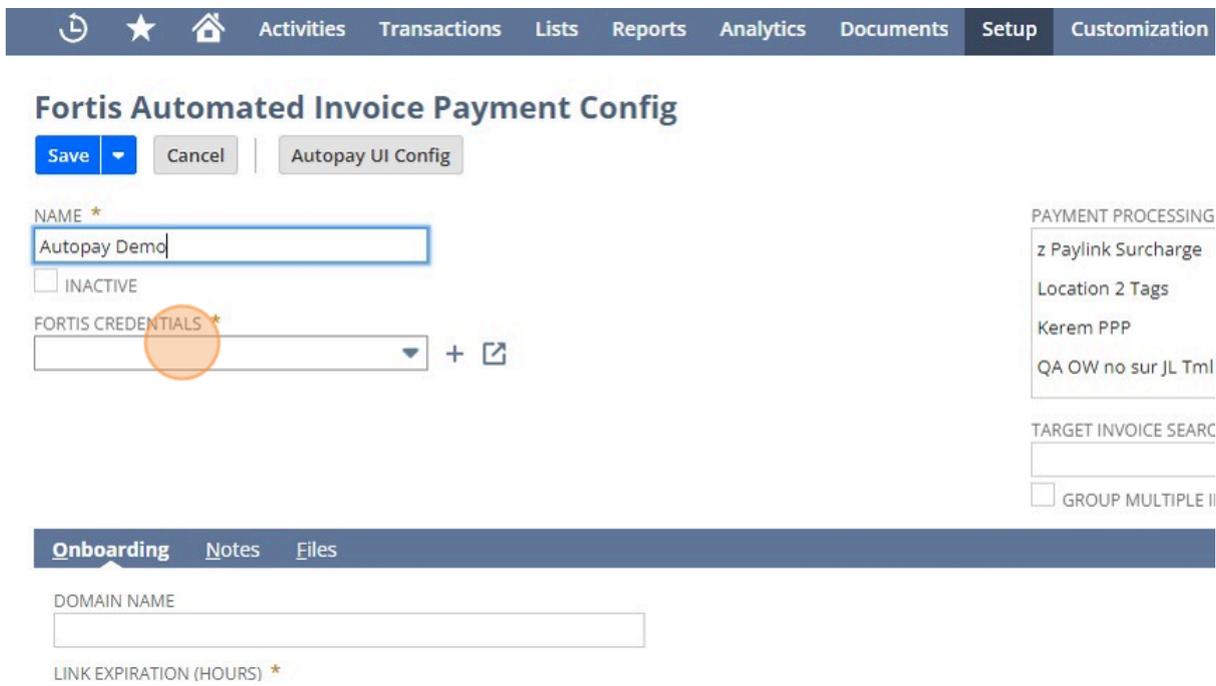
Fortis Automated Payment Configuration (NetSuite)

This is an optional setup, if you plan on sending out automated invoices for payment.

1. Navigate to NetSuite Home page
2. Navigate to **Setup > Fortis > Automated Invoice Pay Config > New**



3. Enter a name for the record



4. Select the Fortis Credentials

INACTIVE
FORTIS CREDENTIALS *

 - New -
 Kerem
 MS Creds SB
 Parent API KEYS
SB Demo
 Test Credential

LINK EXPIRATION (HOURS) *

5. Select the Payment Processing Profile to be used. Multiple profiles can be selected



Config

PAYMENT PROCESSING PROFILE *
 Location 2 Tags
 Kerem PPP
 QA OW no sur JL Tml
SB Demo Profile

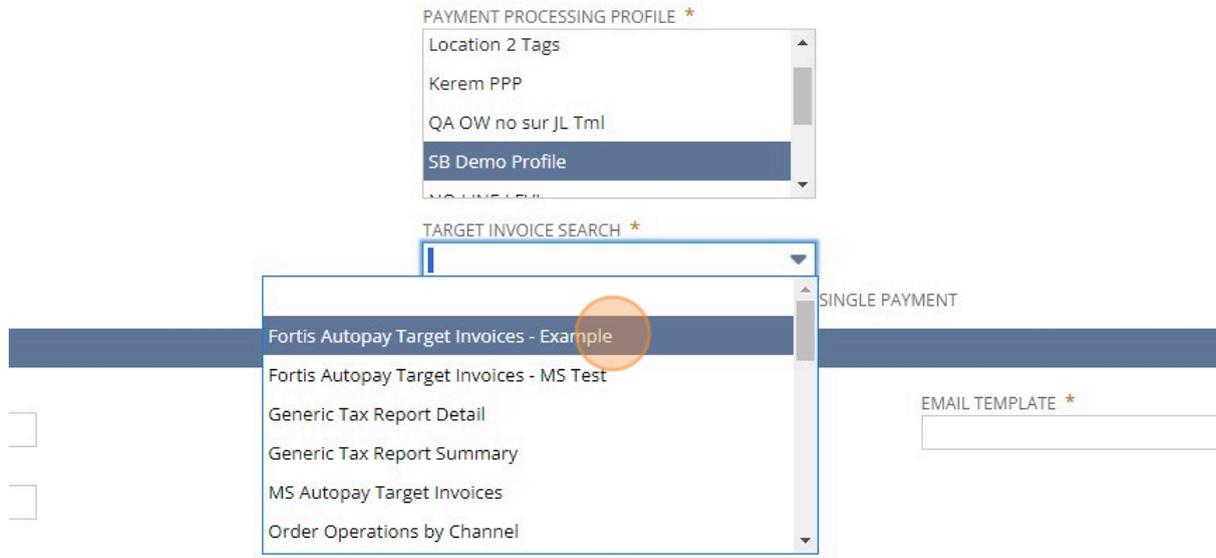
TARGET INVOICE SEARCH *

GROUP MULTIPLE INVOICE PAYMENTS INTO A SINGLE PAYMENT

EMAIL TEMPLATE *

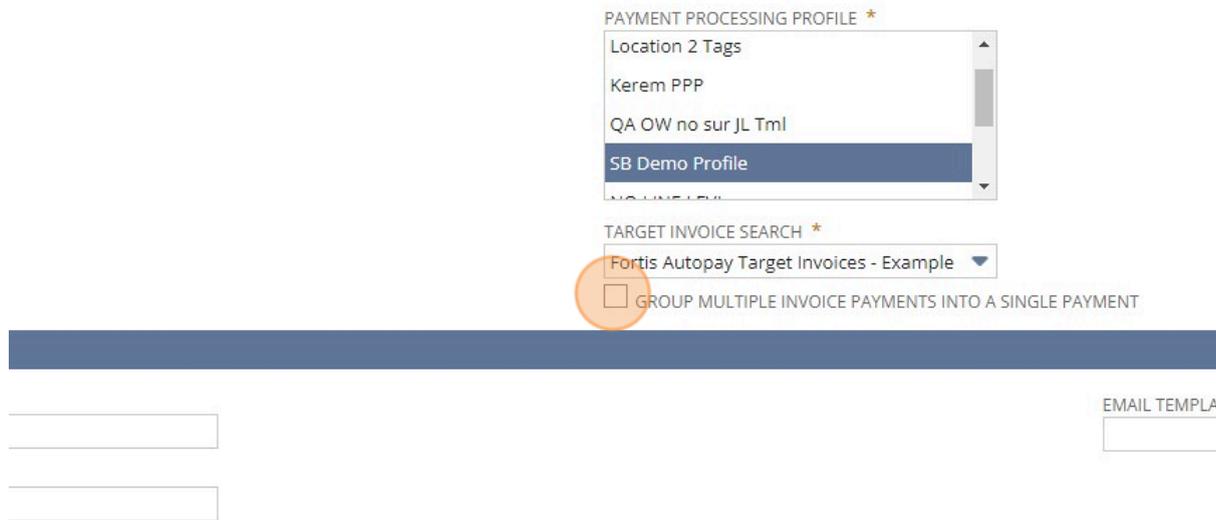
6. Select the Target Invoice Search to be used.

The "Fortis Autopay Target Invoices - Example" search can be used as is, or as a template to create a new search.



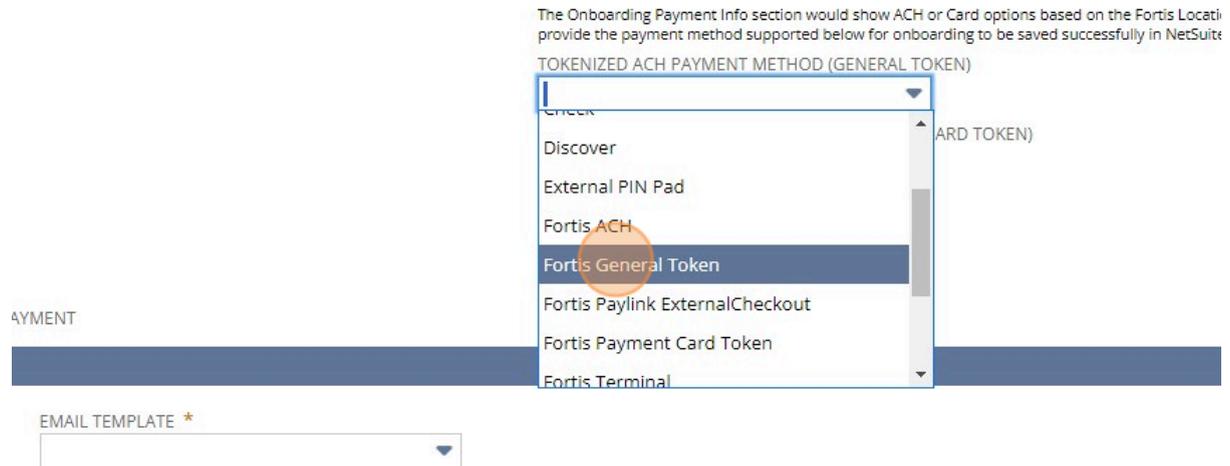
7. Enable "GROUP MULTIPLE INVOICE PAYMENTS INTO A SINGLE PAYMENT" Checkbox is desired

ig



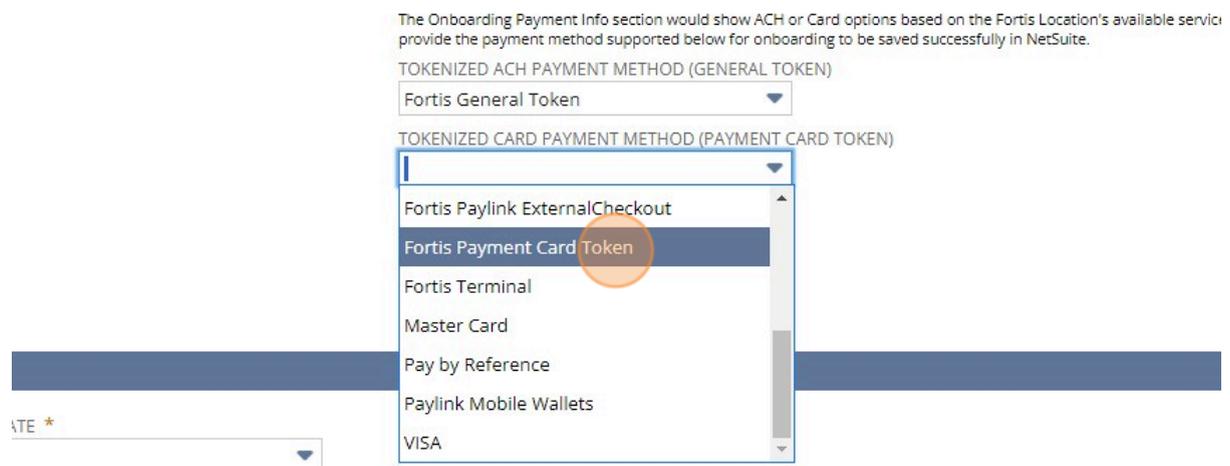
ig

8. Select the General Token payment method



9. Select the Payment Card Token payment method

List Search

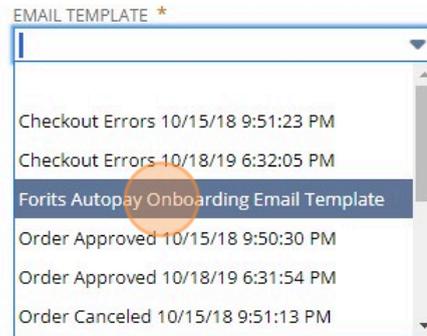


10. Select the Email Template to be used for customer autopay onboarding.

The "Fortis Autopay Onboarding Email Template" can be used as is, or as a template for a new email template.

s Autopay Target Invoices - Example ▾

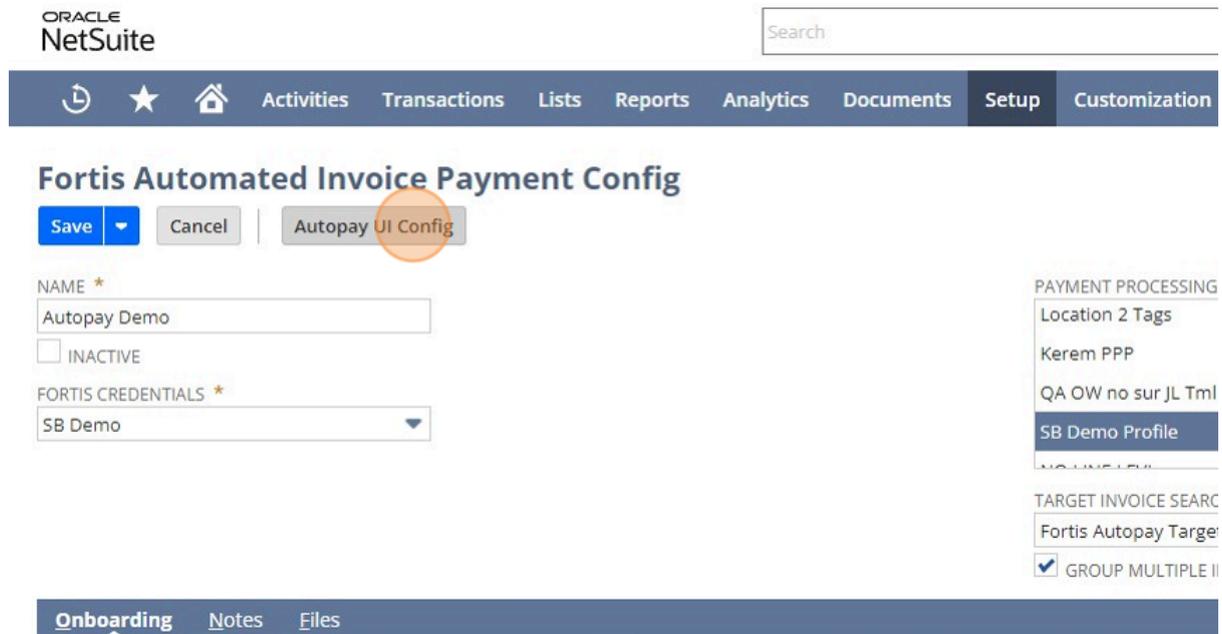
GROUP MULTIPLE INVOICE PAYMENTS INTO A SINGLE PAYMENT



11. Modify the "LINK EXPIRATION" field if needed. This will change the duration for the onboarding link customers receive.

A screenshot of a web form for configuring Autopay. The form has a dark blue header with tabs for "Onboarding", "Notes", and "Files". Below the header, there is a "DOMAIN NAME" field. Below that is the "LINK EXPIRATION (HOURS) *" field, which contains the number "24". An orange circle is drawn around the "24" in this field. At the bottom of the form, there are three buttons: "Save" (with a dropdown arrow), "Cancel", and "Autopay UI Config". To the right of the form, there is a sidebar with a "TARGET INVOICE SEARCH" section containing a dropdown menu with "Fortis Autopay Target" selected, and a checked checkbox labeled "GROUP MULTIPLE I".

12. Click the "Autopay UI Config" button



13. Modify values if needed, then save.

faviconURL

companyName

documentTitle

userMessage

successMessage

Elements Config

Theme Default ▾

Show Validation Animation

Floating Labels

Hide Agreement Checkbox

colorButtonSelectedBackground (#363636)

colorButtonActionBackground (#00d1b2)

colorButtonBackground (#ffffff)

colorFieldBackground (#ffffff)

colorText (#4a4a4a)

colorButtonSelectedText (#####)

colorButtonActionText (#####)

colorButtonText (#363636)

colorFieldBorder (#dbdbdb)

colorLink (#485fc7)

fontSize

borderRadius

rowMarginSpacing

marginSpacing

trimWhitespace

Save Changes

Reset to Default

Reset to Last Saved

14. Save the Automated Invoice Payment Record created.

ORACLE NetSuite

Search

Activities Transactions Lists Reports Analytics Documents Setup Customization

Fortis Automated Invoice Payment Config

Save Cancel Autopay UI Config

NAME *
Autopay Demo

INACTIVE

FORTIS CREDENTIALS *
SB Demo

PAYMENT PROCESSING
Location 2 Tags
Kerem PPP
QA OW no sur JL Tml
SB Demo Profile

TARGET INVOICE SEARCH
Fortis Autopay Target
 GROUP MULTIPLE II

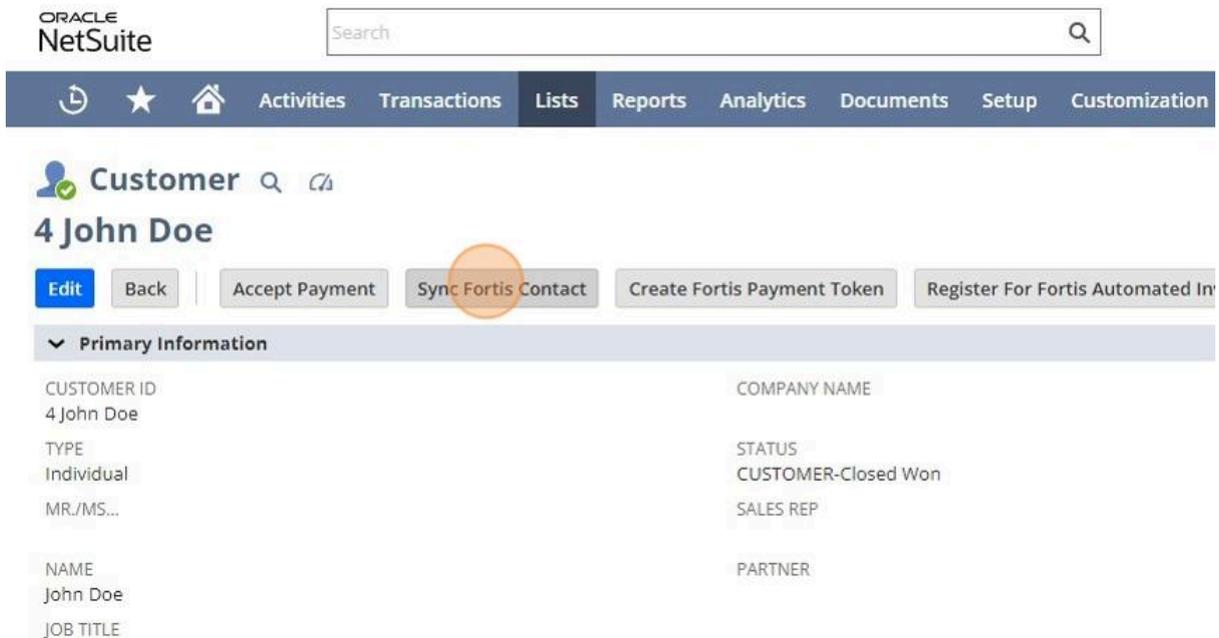
Onboarding Notes Files

Fortis Payments for NetSuite Feature Walkthrough

Customer Registration with Fortis Payments for NetSuite

Customers that are created in NetSuite, are automatically synced to the Fortis Portal once a credit card transaction has occurred and are linked. If you would like to manually sync a profile, you can do so by pressing the “Sync Fortis Contact button”.

1. Click the Sync Fortis Contact to sync the record manually to the Fortis portal



2. Choose the credential name of the profile you want to sync the contact too

Please select one or more credentials to proceed

Fortis Credential Lookup

Show entries Search:

ID	Credential Name	Environment	Created
1	MS Fortis Production Test	Production	7/5/2
4	Kerem Credentials	Sandbox	8/7/2
6	Test Julius Credentials	Sandbox	8/7/2
7	Test Inactive Creds	Sandbox	8/9/2

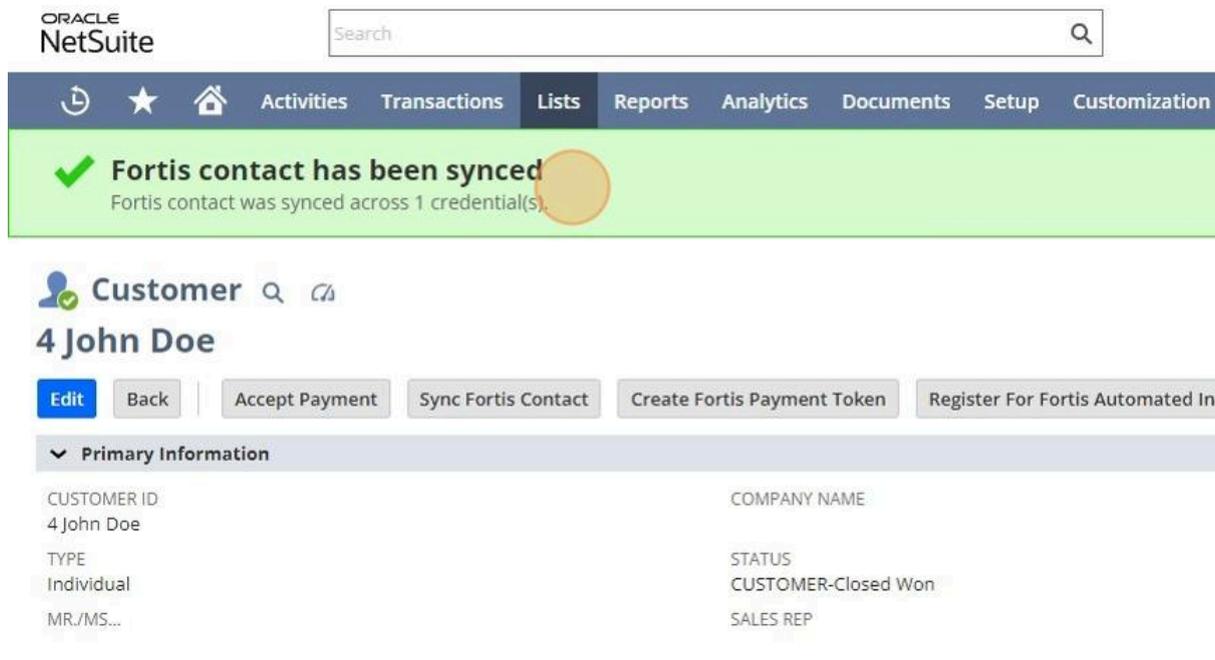
Showing 1 to 4 of 4 entries Previous

3. Click "Submit"

ID	Credential Name	Environment
1	MS Fortis Production Test	Production
4	Kerem Credentials	Sandbox
6	Test Julius Credentials	Sandbox
7	Test Inactive Creds	Sandbox

Showing 1 to 4 of 4 entries Previous

4. You will see the message "Fortis contact has been synced for a successful sync"



Payment Card Token Creation NetSuite

The following section will cover creating a payment token for a customer from within the NetSuite Customer record. When processing a transaction, if the location setup in your Fortis profile is under the location sharing group that supports tokenization, when you charge a regular payment card transaction it will automatically tokenize the card on the first transaction.

Below are the steps for adding a tokenized card from within the customer record in NetSuite if you would like to add the card to the account prior to doing a transaction.

1. Click "View" on the customer you will be adding a tokenized card for

Customers

VIEW Customer General Customize View New Customer

FILTERS

SHOW INACTIVES | EDIT

EDIT VIEW	ID	NAME *	PRIMARY CONTACT	CATEGORY	PRIMARY SUBSIDIARY	SALES REP	P
Edit View	1	Anonymous			Parent Company		
Edit View	3	Guest Shopper			Parent Company		
Edit View	4	John Doe			Parent Company		
Edit View	8	KD ACH Test			Parent Company		
Edit View	9	KD External Checkout Test			Parent Company		
Edit View	24	KD L3 Data Test			Parent Company		
Edit View	10	KD PCT Test			Parent Company		
Edit View	21	KD Surcharge PC Test			Parent Company		
Edit View	16	KD Terminal Test			Parent Company		
Edit View	17	KD Token S Group Trms Test			Parent Company		
Edit View	15	Kerem Duran			Parent Company		

2. Click the "Create Fortis Payment Token" button to add a tokenized card.

Search

Home | **Activities** | Transactions | **Lists** | Reports | Analytics | Documents | Setup | Customization | Commerce

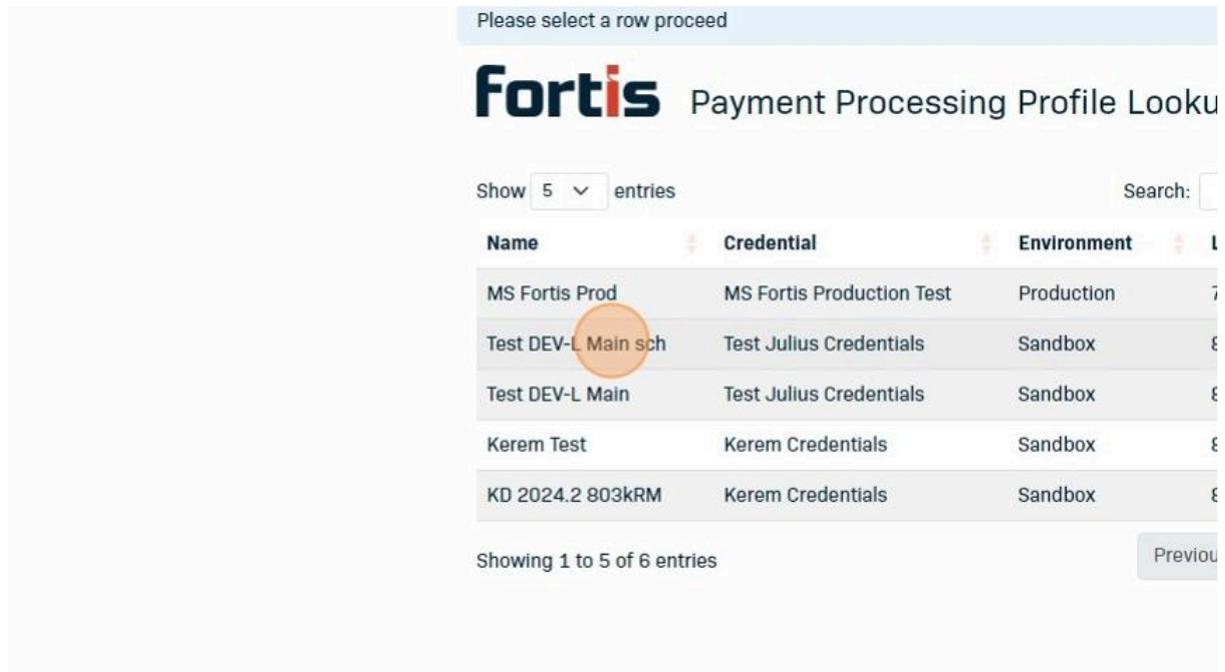
Customer **John Doe**

Accept Payment
Sync Fortis Contact
Create Fortis Payment Token
Register For Fortis Automated Invoice Payments

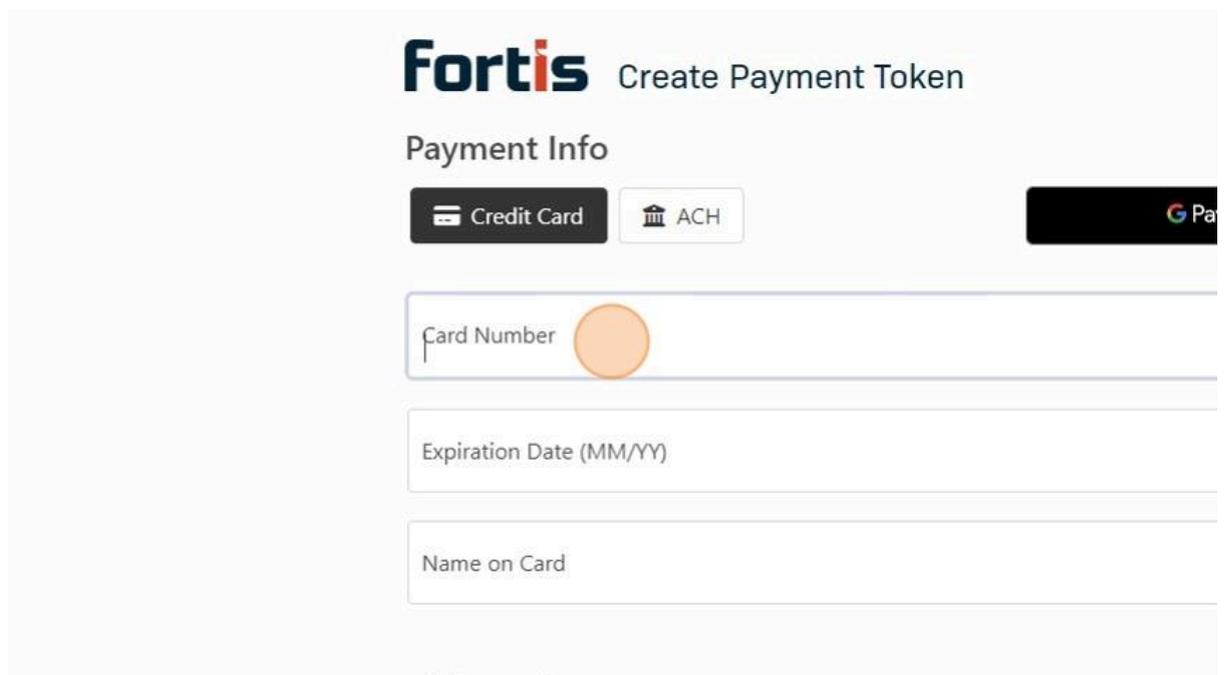
Information

- COMPANY NAME
- STATUS
CUSTOMER-Closed Won
- SALES REP
- PARTNER

3. Click "Account Profile" associated with your account.



4. Click the "Card Number" field.



5. Click the "Expiration Date (MM/YY)" field.

Payment Info

Credit Card ACH [Redacted]

Card Number
4111 1111 1111 1111

Expiration Date (MM/YY)

Name on Card

Billing Info

Address

6. Click the "Name on Card" field.

Payment Info

Credit Card ACH [Redacted]

Card Number
4111 1111 1111 1111

Expiration Date (MM/YY)
12/25

Name on Card

Billing Info

Address

Country

7. Enter in the "Billing Info"

.....

Expiration Date (MM/YY)
12/25

Name on Card
Test Card

Billing Info

Address

Country

State (Optional)

8. Click "Save Card"

City (Optional)
Toronto

Postal Code
k2w 2w2

Save Card

9. You will be now taken back to NetSuite and will be in the new payment card token screen. Click this text field and choose Payment Card Token.

Search | Home | Help | Feedback | Arjune Selvarajan
Fortis DEV-L SCA OW Leading (TD2909532) - Administrator

Reports Analytics Documents Setup Customization Commerce SuiteApps Support

List More

PAYMENT METHOD *

Payment Card Token

STATE
Unknown

INACTIVE

PRESERVE ON FILE

DEFAULT

10. Click "Payment Card Token"

Reports Analytics Documents Setup Customization Commerce SuiteApps Support

List

PAYMENT METHOD *

Payment Card Token

STATE
Unknown

INACTIVE

PRESERVE ON FILE

DEFAULT

TOKEN FAMILY
Fortis

TOKEN NAMESPACE

11. Ensure the Type and Payment Method are selected as "Payment Card Token".

Primary Information

<p>TYPE *</p> <p>Payment Card Token</p>	<p>PAYMENT METHOD *</p> <p>Payment Card Token</p>
<p>CUSTOMER</p> <p>4 John Doe</p>	<p>MEMO</p> <p></p>
<p>MASK</p> <p>VISA *1111 (12/2025)</p>	<p>STATE</p> <p>Unknown</p> <p><input type="checkbox"/> INACTIVE</p> <p><input checked="" type="checkbox"/> PRESERVE ON FILE</p> <p><input type="checkbox"/> DEFAULT</p>

Details

<p>TOKEN</p> <p>31ef66e70f3b96ee8c3793ea</p>	<p>TOKEN FAMILY</p> <p>Fortis</p>
<p>TOKEN EXPIRATION DATE</p> <p></p>	<p>TOKEN NAMESPACE</p> <p>CC_11ef53411af1aa468eb40e31</p>

Substituted Payment Card

<p>ISSUER IDENTIFICATION NUMBER</p> <p>411111</p>	<p>CARDHOLDER NAME</p> <p>Test Card</p>
---	---

12. Choose the card type as Credit

<p>31ef66e70f3b96ee8c3793ea</p> <p>TOKEN EXPIRATION DATE</p> <p></p>	<p>Fortis</p> <p>TOKEN NAMESPACE</p> <p>CC_11ef53411af1aa468eb40e31</p>
--	---

Substituted Payment Card

<p>ISSUER IDENTIFICATION NUMBER</p> <p>411111</p> <p>CARD BRAND</p> <p>VISA</p> <p>CARD TYPE</p> <p>Credit</p> <p>Debit</p> <p><input checked="" type="checkbox"/> Test 24.2 config</p>	<p>CARDHOLDER NAME</p> <p>Test Card</p> <p>LAST FOUR DIGITS</p> <p>1111</p> <p>EXPIRATION DATE</p> <p>12/2025</p>
---	---

CURRENT ENROLLED PAYMENT METHOD CURRENT ENROLLED ACCO

13. Click "Credit"

CC_11ef53411af1aa468eb40e31

Substituted Payment Card

ISSUER IDENTIFICATION NUMBER 411111	CARDHOLDER NAME Test Card
CARD BRAND VISA	LAST FOUR DIGITS 1111
CARD TYPE Credit	EXPIRATION DATE 12/2025

Test 24.2 config

Save Cancel

14. Click this button.

CARD BRAND VISA	LAST FOUR DIGITS 1111
CARD TYPE Credit	EXPIRATION DATE 12/2025

Fortis Autopay Enrollment

ENROL/REPLACE	AUTOPAY CONFIG	CURRENT ENROLLED PAYMENT METHOD	CURRENT ENROLLED ACCO
<input checked="" type="checkbox"/>	Test 24.2 config		

Save Cancel

15. Click "Financial"

ALL PHONE
 MOBILE PHONE
 HOME PHONE

on

PRIMARY

[Communication](#)
[Address](#)
[Sales](#)
[Marketing](#)
[Financial](#)
[Preferences](#)
[System Information](#)
[Custom](#)
[Access](#)

Information

REMINDER DAYS
 PRICE LEVEL
 OVERRIDE CURRENCY FORMAT
 TERMS
 Net 30

LIABILITIES ACCOUNT
 reference

16. You will now see the payment method has been added to the account and the type is listed as "Payment Card Token"

Balance Information

BALANCE	CONSOLIDATED	OVERDUE BALANCE	CONSOLIDATED	
0.00	0.00	0.00	0.00	
DEPOSIT BALANCE	CONSOLIDATED	UNBILLED ORDERS	CONSOLIDATED	
0.00	0.00	10,089.90	10,089.90	
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
0.00	0.00	0.00	0.00	0.00
CONSOLIDATED CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
0.00	0.00	0.00	0.00	0.00

Payment Instruments • [Group Pricing](#) [Item Pricing](#) [Time Tracking](#) [Fortis Automated Invoice Pay Instrument](#) •

EDIT	MASK	TYPE	PAYMENT METHOD	STATE
Edit	VISA *1111 (12/2025)	Payment Card Token	Payment Card Token	Unknown
Edit	VISA *1111 (12/2035)	Payment Card	VISA	Verified

Payment Processing Inside NetSuite

Customer Deposit on Fortis Payment Card Token

1. Click this button field.

The screenshot shows the Oracle NetSuite interface. At the top, there is a search bar and a navigation menu with tabs for Activities, Transactions, Lists, Reports, Analytics, Documents, Setup, and Customization. Below the navigation, the 'Sales Order' page is displayed for '87 4 John Doe' with a 'PENDING APPROVAL' status. A row of action buttons includes 'Edit', 'Back', 'Approve', 'Cancel Order', and 'Create Deposit'. The 'Create Deposit' button is highlighted with an orange circle. Below the buttons is a section titled 'Primary Information' containing fields for ORDER # (87), CUSTOMER (4 John Doe), DATE (8/30/2024), START DATE, END DATE, PO #, MEMO, and a checkbox for 'FOR INVOICE GROUPING'.

2. Click this text field.

Activities Transactions Lists Reports Analytics Documents Setup Customization Commerce SuiteApp

Deposit

Actions

PAYMENT AMOUNT *
986.70

DATE *
8/30/2024

POSTING PERIOD
Aug 2024

CLASS

AUTOMATED INVOICE PAYMENTS

3. Click this text field.

Aug 2024

Classification

SUBSIDIARY
Parent Company

CLASS

FORTIS GENERATED BY AUTOMATED INVOICE PAYMENTS

Payment Method Relationships Communication Custom

PAYMENT OPTION

- New -
- VISA *1111 (12/2035)
- VISA *1111 (12/2025)
- Fortis Terminal
- External Checkout
- Cash

4. Click "VISA *1111 (12/2035)"

SUBSIDIARY
Parent Company

CLASS

FORTIS GENERATED BY AUTOMATED INVOICE PAYMENTS

Payment Method Relationships Communication Custom

PAYMENT OPTION
VISA *1111 (12/2035)



Payment Events

5. Select the payment processing profile you have setup for Fortis

CLASS

LOC

AUTOMATED INVOICE PAYMENTS

Relationships Communication Custom

CSC

PAYMENT PROCESSING PROFILE *

- KD 2024.2 803kRM
- KD 2024.2 803kRM
- KD 2024.2 Surcharge
- Kerem Test
- MS Fortis Prod
- Test DEV-L Main
- Test DEV-L Main sch

PAYM

Sale

FORT

FORT

FORT

FORT

FORT

FORT

FORT

6. Ensure the handling mode is selected as "Process"

TED INVOICE PAYMENTS

Relationships Communication Custom

CSC

PAYMENT PROCESSING PROFILE *

Test DEV-L Main sch

HANDLING MODE *

- Process
- Process
- Record External Event
- Save Only

PAYMENT OF Sale

FORTIS ACH C

FORTIS ACH S

FORTIS SETTL

FORTIS SETTL

FORTIS SETTL

FORTIS SETTL

FORTIS TERM

FORTIS: T

7. Click this button.

Payment Events

DATE	TRANSACTION	EVENT	HANDLING MODE	PAYMENT OPTION
No records to show.				

Save Cancel Actions

8. You now have created the deposit you will see a successful payment event below

19 **DEPOSITED**

[Edit](#) [Back](#) [Apply](#) [Print](#) [Refresh](#) [Actions](#)

Primary Information

CUSTOMER 4 John Doe	PAYMENT AMOUNT 1,019.26
SALES ORDER Sales Order #87	DATE 8/30/2024
DEPOSIT # 19	POSTING PERIOD Aug 2024

Classification

SUBSIDIARY Parent Company	CLASS
------------------------------	-------

FORTIS GENERATED BY AUTOMATED INVOICE PAYMENTS

Payment Method	Applied To	Relationships	Communication	System Information	Custom	GL Impact
PAYMENT OPTION VISA *1111 (12/2035)						AUTH. CODE 66efe5
PAYMENT PROCESSING PROFILE						P/I REF

Take Payments with SuiteCommerce

The first step in ensuring you can take payments with Fortis and SuitePayments is making sure the payment methods you want to support on the SuiteCommerce webstore are selected to display on the website.

The following payment methods are supported for SuiteCommerce & Fortis.

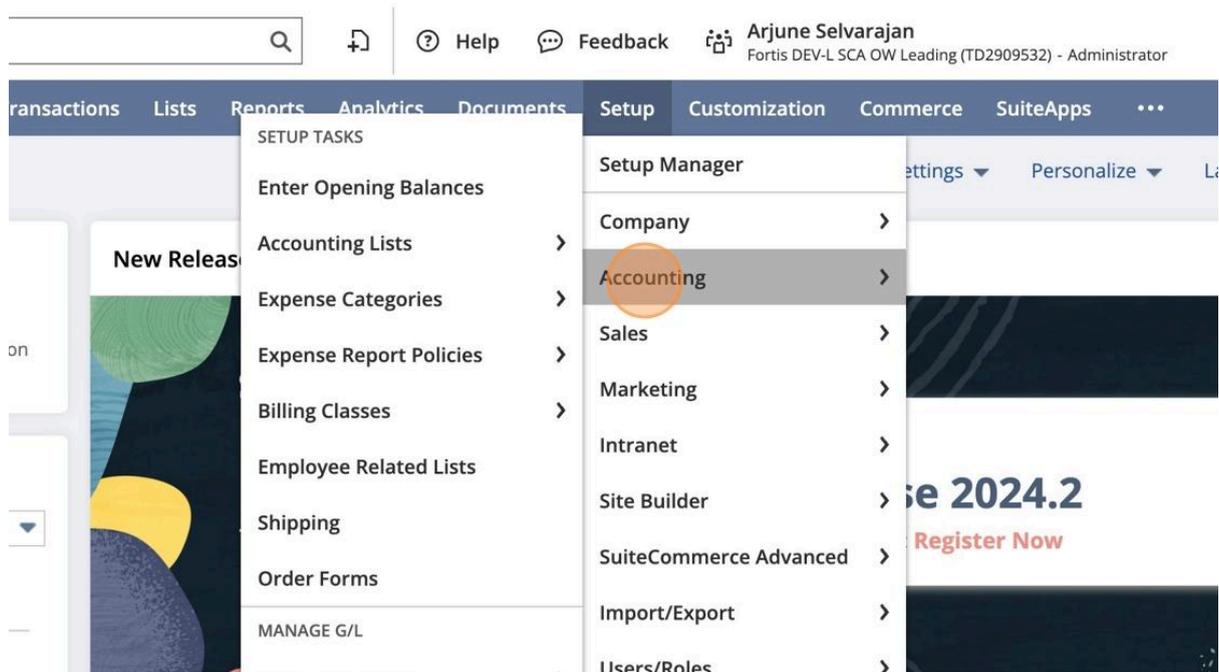
- Card Payments
- Card Token
- ACH
- ACH Token
- External Checkout (Only Sales)

Important

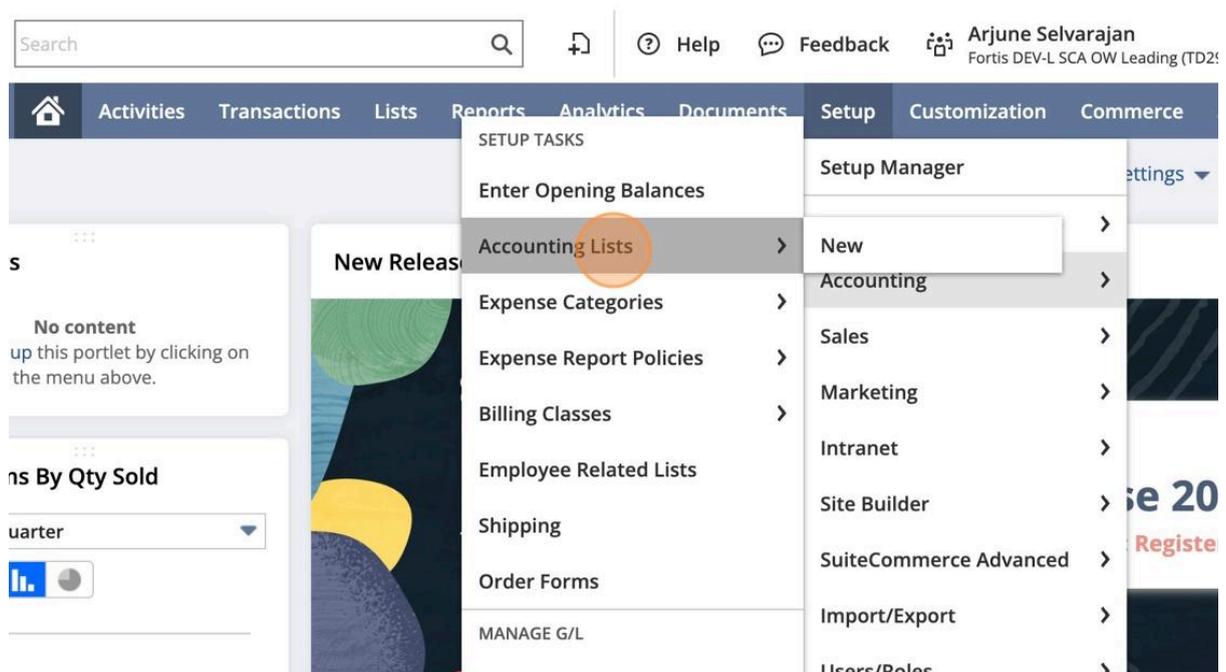
To use the External Checkout option with SuiteCommerce advanced, the PPP profile must have authorizations turned off — as only the sale operation is supported.

Navigate to Payment Methods: **Setup > Accounting > Accounting Lists**

1. Click "Accounting"



2. Click "Accounting Lists"



3. Click "View"

EDIT VIEW	CARD
Edit View	Check
Edit View	Discover
Edit View	External Checkout
Edit View	Fortis ACH
Edit View	Fortis General Token
Edit View	Fortis Terminal
Edit View	Master Card
Edit View	Pay by Ref
Edit View	Payment Card Token
Edit <u>View</u>	VISA

4. Ensure Display in Website is checked

The screenshot shows the NetSuite Setup page for Card Brands. The navigation bar includes: Transactions, Lists, Reports, Analytics, Documents, Setup (selected), Customization, Commerce, SuiteApps, and a menu icon. On the right, there are 'List' and 'Search' options. The main content area is divided into sections: ASSOCIATED PAYMENT PROCESSING PROFILES (listing MS Fortis Prod, Test DEV-L Main sch, Test DEV-L Main, Kerem Test, KD 2024.2 803kRM, and KD 2024.2 Surcharge), COUNTRIES, and CARD BRANDS. Under CARD BRANDS, there are two checkboxes: 'INACTIVE' (unchecked) and 'DISPLAY IN WEBSITE' (checked). The 'DISPLAY IN WEBSITE' checkbox is highlighted with an orange circle.

If your SuiteCommerce website is already setup and running and the website is selected in the PPP (Payment Processing Profile) for Fortis then the payment methods that are displayed on the website should appear.

Example: Website selected on the payment processing profile

Fortis SuitePayments Plugin Payment Processing Profile

| Actions

▼ Primary

WEB SITE

- Demo Site
- Demo: Blank US OneWorld Account

Record an External Payment Event

If your payment event is recorded outside the NetSuite platform such as inside the Fortis portal for an example an authorization, and you want to now capture that payment in NetSuite you can do so on your Sales Order.

1. Choose the payment option for the customer.

123 main st
 test CA 94117
 United States

FORTIS CUSTOM PRE-AUTH AMOUNT

Payment •

PAYMENT OPTION

- New -
- VISA *1111 (12/2025)
- Fortis Terminal
- External Checkout
- Cash
- Check

FORTIS ACH CHECK N

FORTIS ACH SEC COE

FORTIS SETTLEMENT

FORTIS SETTLEMENT

FORTIS SETTLEMENT

FORTIS SETTLEMENT

FORTIS TERMINAL DE

2.

FORTIS CUSTOM PRE-AUTH AMOUNT

Payment •

PAYMENT OPTION

- New -
- VISA *1111 (12/2025)
- Fortis Terminal
- External Checkout
- Cash
- Check

FORTIS ACH CHECK N

FORTIS ACH SEC COE

FORTIS SETTLEMENT

FORTIS SETTLEMENT

FORTIS SETTLEMENT

FORTIS SETTLEMENT

FORTIS TERMINAL DE

FORTIS: TOKENIZ

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

3. Change the handling mode to Record an External Event

ment •

ENT OPTION *1111 (12/2025) ▼	CSC <input type="text"/>	AUTH. CODE <input type="text"/>
	PAYMENT PROCESSING PROFILE KD 2024.2 803kRM ▼	P/N REF. <input type="text"/>
	HANDLING MODE * Record External Event ▼ Process Record External Event Save Only	PAYMENT OPERATION Authorization
		FORTIS ACH CHECK NUMBER(FOR <input type="text"/>
		FORTIS ACH SEC CODE OVERRIDE <input type="text"/>
		FORTIS SETTLEMENT BATCH: SERV <input type="text"/>
		FORTIS SETTLEMENT BATCH NUME <input type="text"/>
		FORTIS SETTLEMENT BATCH LINE: : <input type="text"/>

4. Click "Record External Event"

ment •

ENT OPTION *1111 (12/2025) ▼	CSC <input type="text"/>	AUTH. CODE <input type="text"/>
	PAYMENT PROCESSING PROFILE KD 2024.2 803kRM ▼	P/N REF. <input type="text"/>
	HANDLING MODE * Record External Event ▼	PAYMENT OPERATION Authorization
		FORTIS ACH CHECK NUMBER(FOR <input type="text"/>
		FORTIS ACH SEC CODE OVERRIDE <input type="text"/>
		FORTIS SETTLEMENT BATCH: SERV <input type="text"/>
		FORTIS SETTLEMENT BATCH NUM <input type="text"/>
		FORTIS SETTLEMENT BATCH LINE: <input type="text"/>
		FORTIS TERMINAL DEVICE ID <input type="text"/>

5. Enter the P/N ref for the transaction that was recorded outside NetSuite

Map

CSC

PAYMENT PROCESSING PROFILE
KD 2024.2 803kRM

HANDLING MODE *
Record External Event

AUTH. CODE

P/N REF.

PAYMENT OPERATION
Authorization

FORTIS ACH CHECK NUMBER(FOR USING TEL)

FORTIS ACH SEC CODE OVERRIDE

FORTIS SETTLEMENT BATCH: SERVICE

FORTIS SETTLEMENT BATCH NUMBER

6. Change the payment operation to the operation you are doing

CSC

PAYMENT PROCESSING PROFILE
KD 2024.2 803kRM

HANDLING MODE *
Record External Event

AUTH. CODE

P/N REF.

PAYMENT OPERATION
Authorization
Authorization
Sale

FORTIS ACH SEC CODE OVERRIDE

FORTIS SETTLEMENT BATCH: SERVICE

FORTIS SETTLEMENT BATCH NUMBER

FORTIS SETTLEMENT BATCH LINE: SETTLED DATE

7. Click "Sale"

CSC

PAYMENT PROCESSING PROFILE
KD 2024.2 803kRM

HANDLING MODE *
Record External Event

AUTH. CODE

P/N REF.

PAYMENT OPERATION
Sale

FORTIS ACH CHECK NUMBER(FOR USING TEL)

FORTIS ACH SEC CODE OVERRIDE

FORTIS SETTLEMENT BATCH: SERVICE

FORTIS SETTLEMENT BATCH NUMBER

FORTIS SETTLEMENT BATCH LINE: SETTLED DATE

FORTIS TERMINAL DEVICE ID

8. Save the record to process the payment event

Record External Event

date

FORTIS ACH CHECK N

FORTIS ACH SEC COD

FORTIS SETTLEMENT

FORTIS SETTLEMENT

FORTIS SETTLEMENT

FORTIS TERMINAL DE

FORTIS: TOKENIZ

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

Save

Cancel

Auto Fill

Actions

9. Under the billing tab you should see the new payment event

.....

FORTIS SETTLEMENT BATCH

FORTIS SETTLEMENT BATCH LINE

FORTIS SETTLEMENT BATCH: SERVICE

FORTIS SETTLEMENT BATCH NUMBER

FORTIS SETTLEMENT BATCH LINE: SETTLED DATE

FORTIS TERMINAL DEVICE ID

FORTIS: TOKENIZE AFTER TERMINAL PAYMENT

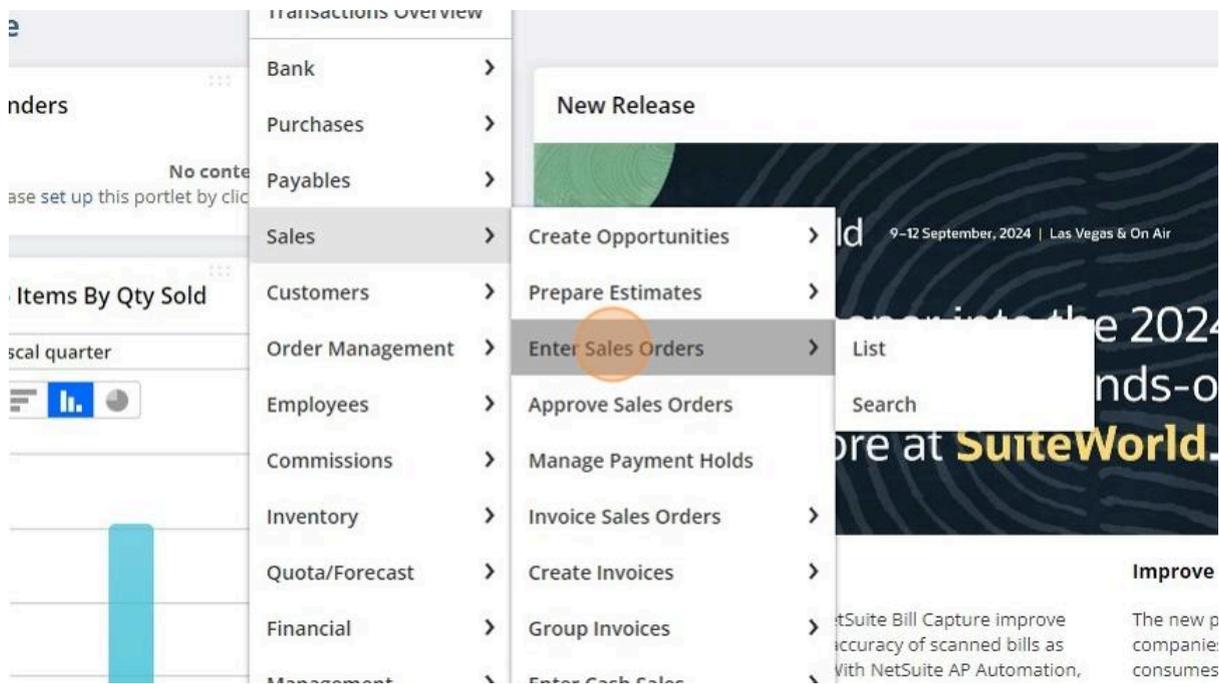
EVENT	HANDLING MODE	PAYMENT OPTION	RESULT	REASON	AMOUNT	VIEW DETAILS
Sale	Record External Event	VISA *1111 (12/2025)	Accept	Operation was successful	132.00	View

el Order Create Deposit | Actions

EMV - Fortis Terminal Devices

The following instructions will cover how to take a payment on a Fortis Terminal Devices from a Sales Order, the operation can also be done on a cash sale, or a customer deposit record in NetSuite.

1. Click "Enter Sales Orders"



2. Click this text field.

The screenshot shows the NetSuite Sales Order form. The 'CUSTOMER' field is highlighted with an orange circle. The form includes the following fields:

- Primary Information:**
 - CUSTOM FORM *: Standard Sales Order
 - ORDER #: To Be Generated
 - CUSTOMER *: [Highlighted]
 - DATE *: 9/5/2024
 - STATUS *: Pending Approval
 - START DATE: [Empty]
 - END DATE: [Empty]
 - PO #: [Empty]
 - MEMO: [Empty]
 - FOR INVOICE GROUPING
- Sales Information:**
 - SALES REP: [Empty]
 - SALES EFFECTIVE DATE: [Empty]

3. Choose your customer.

Favorites (0/5)

All Items

- ☆ 1 Anonymous
- ☆ 10 KD PCT Test
- ☆ 11 Test Julius 24.2 Cards
- ☆ 12 Test AVS
- ☆ 13 Test 24.2 Terminal
- ☆ 14 Test 24.2 TOP 1
- ☆ 141 Test 24.2 TOP 1 : Test 24.2 TOP 2
- ☆ 142 Test 24.2 TOP 1 : Test 24.2 TOP 2 : Test 24.2 TOP 3
- ☆ 15 Kerem Duran
- ☆ 16 KD Terminal Test
- ☆ 17 KD Token S Group Trns Test
- ☆ 18 Test 24.2 Surcharge

FOR INVOICE GROUPING

SALES EFFECTIVE DATE

EXCLUDE COMMISSIONS

CLASS

FORTIS PAYLINK QUOTE CONVERSION LOGIC OVER

4.

Parent Company

- ☆ Infinity-Table
- FORTIS PAYLINK END CUSTOMER LINK
- ☆ Nested-Coffee-Tables
- ☆ Ottoman-Coffee-Table-Hybrid
- ☆ Polished-Concrete-Table
- ☆ Window-Coffe-Table

Items Promotions Shipping Billing Relationships Communication Custom

- ☆ Wine-Crate-Table
- DISCOUNT ITEM
- ☆ Fortis surcharge item
- ☆ Test item 1

Add Multiple Upsell Items Clear All Lines

- ☆ Billable Expense Markup
- ☆ Subtotal

ITEM Description	QUANTITY	UNITS	DESCRIPTION

FORTIS PAYLINK QUOTE CONVERSION LOGIC OVER

FORTIS PAYLINK QUOTE CONVERSION LOGIC OVER

5. Add an item to the order

Parent Company

FORTIS PAYLINK END CUSTOMER LINK

FORTIS PAYLINK QUOTE CONVERSION LOGIC OVER

Items Promotions Shipping **Billing** Relationships Communication Custom

DISCOUNT ITEM

Add Multiple Upsell Items Clear All Lines

ITEM *	QUANTITY	UNITS	DESCRIPTION	SERIAL/LOT NUMBERS	PRICE LEVEL
Window-Coffe-Table	1				Base Price

+

6. Click "Billing"

Classification

SUBSIDIARY Parent Company

CLASS

FORTIS PAYLINK END CUSTOMER LINK

FORTIS PAYLINK QUOTE CONVERSION LOGIC OVER

Items Promotions Shipping **Billing** Relationships Communication Custom

Billing Information

TERMS

BILLING SCHEDULE

FORTIS CUSTOM PRF-AMOUNT

7. Under the Payment Option choose the Fortis Terminal

FORTIS CUSTOM PRE-AUTH AMOUNT

Payment •

PAYMENT OPTION  + 

- New -
- Fortis Terminal
- External Checkout
- Cash
- Check

8. Click "Fortis Terminal"

FORTIS CUSTOM PRE-AUTH AMOUNT

Payment •

PAYMENT OPTION

- New -
-  Fortis Terminal
- External Checkout
- Cash
- Check

9. Click this text field.

H AMOUNT

PAYMENT PROCESSING PROFILE *

HANDLING MODE *

- Process
- Process
- Record External Event
- Save Only

10. Click this text field.

H AMOUNT

PAYMENT PROCESSING PROFILE *

HANDLING MODE *

11. Click "List Terminals"

FORTIS ACH CHECK NUMBER(FOR USING TEL)

FORTIS ACH SEC CODE OVERRIDE

FORTIS SETTLEMENT BATCH: SERVICE

FORTIS SETTLEMENT BATCH NUMBER

FORTIS SETTLEMENT BATCH LINE: SETTLED DATE

FORTIS TERMINAL DEVICE ID

FORTIS: TOKENIZE AFTER TERMINAL PAYMENT

PAYMENT OPTION	RESULT	REASON	AMOUNT	VIEW DETAILS

12. Choose the terminal tied to the location that you would like to take payment on

Please Select a row to proceed.

Fortis Manage Terminals

Show entries Search:

Name	Location	Active	Created	
test DJ	We Are Outpost 803kRM	true	3/4/2024	
Mock Terminal Edited 2	Token Sharing Group #3	true	5/21/2024	
Mock Terminal	Token Sharing Group #2	true	5/21/2024	
Mock Terminal	Token Sharing Group #1	true	5/21/2024	
Mock Terminal	QA non-OW - with surcharge	true	5/21/2024	

Showing 1 to 5 of 20 entries

13. Click this button.

PAYMENT OPTION

Fortis Terminal

PAYMENT PROCESSING PROFILE *

KD 2024.2 803kRM

HANDLING MODE *

Process

DATE	TRANSACTION	EVENT	HANDLING MODE	PAYMENT OPTION
No records to show.				

Save

Cancel

Auto Fill

Actions

14. Click "Billing"

OPPORTUNITY

EXCLUDE COMMISSIONS

▼ **Classification**

SUBSIDIARY

Parent Company

FORTIS PAYLINK END CUSTOMER LINK

CLASS

FORTIS PAYLINK QUOTE CONVERSION LOGIC OVER

FORTIS PAYLINK CONFIG

Items

Promotions

Shipping

Billing

Relationships

Communication

Related Records

System Information

DISCOUNT ITEM R

ITEM	COMMITTED	PICKED	PACKED	FULFILLED	INVOICED	BACK ORDERED	QUANTITY	UNITS	DESCRIPTION
Window-Coffe-Table	0	0	0	0	0		1		

15. Now the Fortis Terminal should be primed to take payment

FORTIS SETTLEMENT BATCH LINE: SETTLED DATE

FORTIS TERMINAL DEVICE ID

FORTIS: TOKENIZE AFTER TERMINAL PAYMENT

OPTION	RESULT	REASON	AMOUNT	VIEW DETAILS
Terminal	Pending	Payment device was primed	132.00	View

Actions

16. Click "Billing"

SALES REP

SALES EFFECTIVE DATE
9/5/2024

OPPORTUNITY

EXCLUDE COMMISSIONS

Classification

SUBSIDIARY
Parent Company

CLASS

FORTIS PAYLINK END CUSTOMER LINK

FORTIS PAYLINK QUOTE CONVERSION LOGIC OVE

Items Promotions Shipping **Billing** Relationships Communication Related Records System Information

DISCOUNT ITEM

ITEM	COMMITTED	PICKED	PACKED	FULFILLED	INVOICED	BACK ORDERED	QUANTITY	UNITS	DESCRIPTION
Window-Coffe-Table	0	0	0	0	0		1		

17. Once payment has been taken you will see an "Operation was successful" in NetSuite with a payment event

H	FORTIS SETTLEMENT BATCH LINE: SETTLED DATE			
H LINE	FORTIS TERMINAL DEVICE ID			
H: SERVICE	<input type="checkbox"/> FORTIS: TOKENIZE AFTER TERMINAL PAYMENT			
H NUMBER				

PAYMENT OPTION	RESULT	REASON	AMOUNT	VIEW DETAILS
Fortis Terminal	Pending	Payment device was primed	132.00	View
Fortis Terminal	Accept	Operation was successful	132.00	View

18. In this case it resulted in a customer deposit since it was a sales order, but you can also process a terminal transaction on a cash sale

FORTIS CUSTOM PRE-AUTH AMOUNT

Payment • **Schedule** •

PAYMENT OPTION Fortis Terminal	FORTIS SETTLEMENT BATCH
PAYMENT PROCESSING PROFILE KD 2024.2 803kRM	FORTIS SETTLEMENT BATCH LINE
FORTIS ACH CHECK NUMBER(FOR USING TEL)	FORTIS SETTLEMENT BATCH: SERVICE
FORTIS ACH SEC CODE OVERRIDE	FORTIS SETTLEMENT BATCH NUMBER

DATE	TRANSACTION	EVENT	HANDLING MODE	PAYMENT OPTION
9/5/2024 10:51 am	Sales Order #94	Sale	Process	Fortis Terminal
9/5/2024 10:52 am	Customer Deposit #21	Sale	Process	Fortis Terminal

Edit
Back
Approve
Cancel Order
Create Deposit
🖨️
↺
Actions

i Important

Terminal does not support surcharge yet.

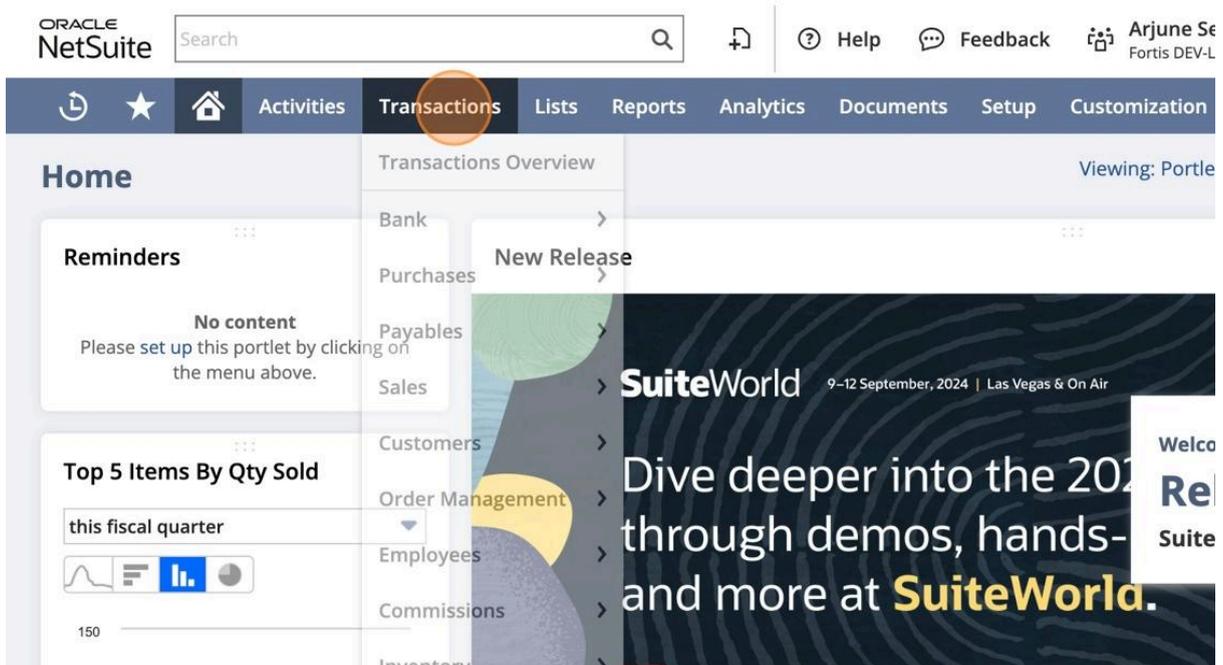
Error Handling

When processing payments, a transaction may fail for various reasons, such as incorrect input data. In such cases, an error code will be displayed, accompanied by a "Payment Card Hold" warning or a different error message when the record is saved.

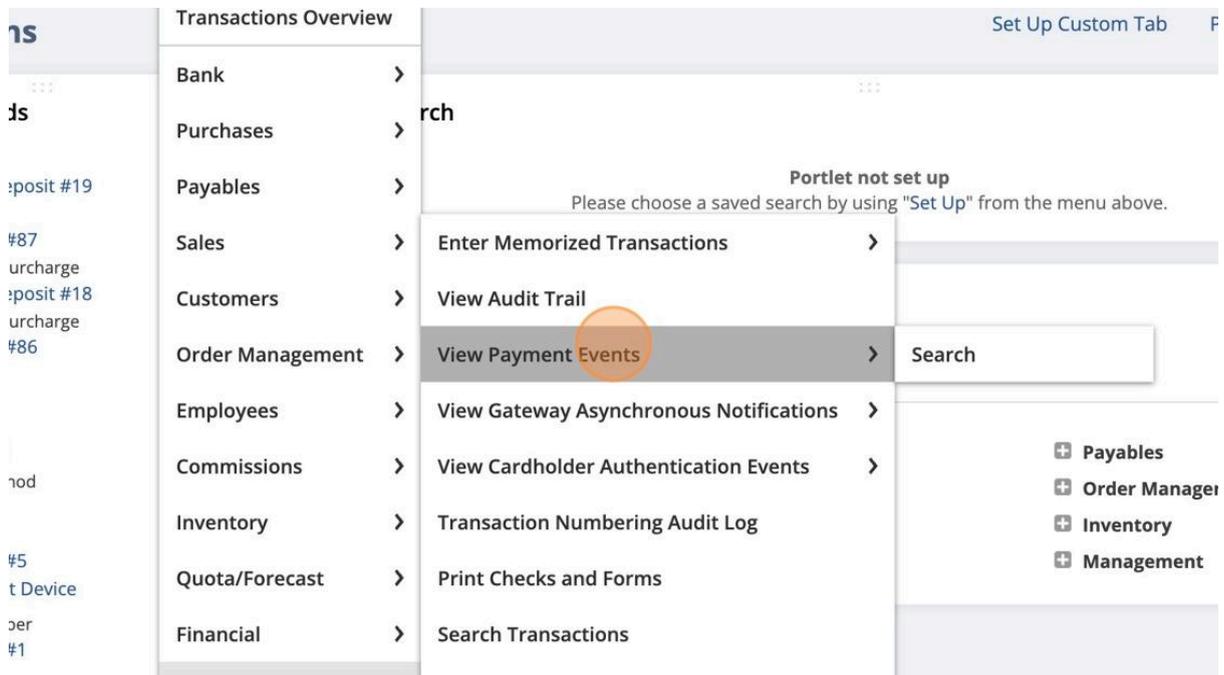
To see a more detailed log describing the reason for the transaction failure, you can view details of the payment event.

Logs of the Payment events can be access in NetSuite via the menu by navigating to **Transactions > Management > View Payment Events**.

1. Click "Transactions"



2. Click "View Payment Events"



3. This is what that window displays

ORACLE NetSuite Help Feedback Arjune Se Fortis DEV-L

Activities **Transactions** Lists Reports Analytics Documents Setup Customization

Payment Events

VIEW Payment Events Customize View

FILTERS

9/3/2024

#	PAYMENT EVENT DATE	TEST MODE	TRANSACTION	CUSTOMER	PAYMENT PROCESSING PROFILE	PAYMENT CARD NUMBER	
1	9/3/2024 10:31 am	Yes	Payment #32	26 Test Julius Cust Center	Test DEV-L Main	VISA *1111 (12/2025)	S
2	8/30/2024 11:52 am	Yes		25 Guest Shopper 2	Kerem Test	External Checkout	A
3	8/30/2024 9:49 am	Yes	Customer Deposit #19	4 John Doe	Test DEV-L Main sch	VISA *1111 (12/2035)	S
4	8/30/2024 9:35 am	Yes	Customer Deposit #18	18 Test 24.2 Surcharge	Test DEV-L Main sch	VISA *0004 (12/2025)	S

4. Click # to payment event you would like to get more information on

Activities **Transactions** Lists Reports Analytics Documents Setup Customization

Payment Events

VIEW Payment Events Customize View

FILTERS

9/3/2024

#	PAYMENT EVENT DATE	TEST MODE	TRANSACTION	CUSTOMER	PAYMENT PROCESSING PROFILE	PAYMENT CARD NUMBER	
1	9/3/2024 10:31 am	Yes	Payment #32	26 Test Julius Cust Center	Test DEV-L Main	VISA *1111 (12/2025)	S
2	8/30/2024 11:52 am	Yes		25 Guest Shopper 2	Kerem Test	External Checkout	A
3	8/30/2024 9:49 am	Yes	Customer Deposit #19	4 John Doe	Test DEV-L Main sch	VISA *1111 (12/2035)	S
4	8/30/2024 9:35 am	Yes	Customer Deposit #18	18 Test 24.2 Surcharge	Test DEV-L Main sch	VISA *0004 (12/2025)	S
5	8/19/2024 3:12 am	Yes	Payment #12	9 KD External Checkout Test	Kerem Test	External Checkout	S

5. Here you will see all the response information for that payment event as well as the raw request and raw response — this is what will be needed by the support team to help identify why the payment failed or had an error.

CARD REF. CODE
 12345

▼ Response Information

<small>PAYMENT STATUS</small> Accept	<small>AVS STREET MATCH</small> Match failed
<small>REASON</small> Operation was successful	<small>AVS ZIP MATCH</small> Match failed
<small>DETAILS</small> CC - Approved / ACH - Accepted	<small>CSC MATCH</small> Match failed
<small>P/N REF.</small> 31ef6a1a62c8b55e9a9af86b	
<small>AUTH. CODE</small> 6a1a63	
<small>NEW INITIAL USE REFERENCE</small>	

Raw Request
Raw Response

RAW REQUEST
 3) {"url":"GET: transactions/31ef6a1a62c8b55e9a9af86b\n","body":"null\n"}

 2) {"url":"POST: transactions/cc/sale/keyed\n","body":
 {"\order_number\":"57","\location_id\":"11ef53424cda372abca18bf1","\product_transaction_id\":"11ef5342be5cf5e0b2ef4808","\cus: