



Peach Payment Link User Manual

Overview

The **Peach Payment Links** add-on enables businesses to quickly and securely generate **payment links and QR codes** directly from **Sales Quotes, Sales Orders, and Sales Invoices** within Microsoft Dynamics 365 Business Central.

This solution simplifies the customer payment process and helps businesses get paid faster while maintaining full control over document posting and payment tracking.

With this add-on, users can:

- Create, cancel, or query a **payment link** for a document.
- Print the **payment link or QR code** directly on customer documents.
- Control whether to send payment links via **Email, SMS, or WhatsApp** (optional).
- Restrict posting of unpaid documents.
- Monitor all payment activity via **logs** and **dashboard cues**.

Peach Payments Setup

The **Peach Payments Setup** page manages all configuration and authentication required to connect Business Central to Peach Payments.

Setup Fields and Options

Field	Description
Enable Peach Payments	Activates or deactivates the functionality within the environment.
Sandbox Mode	Allows users to create payment links in <i>test mode</i> for validation and training without affecting live data.
Dashboard URL	A direct link to the Peach Payments Dashboard , where users can view all created links and manage other Peach Payment services.
Authentication Details	Credentials required to connect Business Central to Peach Payments. These details can be obtained from the Peach



Field	Description
	Payments dashboard on the Payment Links section, on the Settings tab.
Restrictions	Optional setup to prevent posting of Sales Orders, Quotes, or Invoices that have unpaid payment links.
Payment Link Logs	Provides visibility into connectivity and transaction issues for troubleshooting.

Note:

All requests to the Peach Payments API are authenticated using **OAuth and renewing tokens**, ensuring that only valid tokens can be used for requests.

Document Integration

Peach Payment Link integrate with key sales documents within Business Central:

- **Sales Quote**
- **Sales Order**
- **Sales Invoice**

Each document includes a **FactBox** that provides access to payment link management.

FactBox Features

Feature	Description
Create Payment Link	Generates a unique payment link and QR code for the current document.
Cancel Payment Link	Cancels an active link, preventing further payments.
View Payment Link Card	Opens a detailed card showing the link, QR code, amount, and payment status.
View Payment Logs	Displays any recorded issues or failed transactions associated with this document.
Status Check	Performs a real-time verification against Peach Payments' API to confirm payment. Updates status to Complete once payment is confirmed.



Feature	Description
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Report Integration

Payment links and QR codes are embedded into the following standard Business Central reports:

Supported Standard Reports

Document Type	Report Name	Enhancement
Sales Quote	<i>Sales Quote Report</i>	Payment Link and QR Code added.
Sales Order	<i>Sales Order Confirmation Report</i>	Payment Link and QR Code added for customer order confirmations.
Sales Order / Invoice	<i>Proforma Invoice Report</i>	Payment Link and QR Code added to invoice reports.

Custom reports can also include payment link functionality by copying the integration logic from the standard reports provided.

Job Queue Setup (Optional)

A **Job Queue Entry** can be created to automatically perform payment status checks at scheduled intervals.

Job Queue Functionality

- Runs automatically based on a set schedule.
- Calls the Peach Payments API using OAuth authentication.
- Updates the status of all **active payment links when paid** (e.g., *Active* → *Completed*).
- Ensures your Business Central data remains synchronized with real-world payment activity.

Recommended Interval

Run the job queue every **240 minutes**, depending on business volume and transaction frequency.



Role Center Integration

A **Manager Panel** has been added to all **Manager Role Centers** to provide quick visibility into payment-related activities.

Cues Include:

- **Active / Unpaid Payment Links**
- **Error Logs**
- **Job Queues**

The panel can be toggled via **personalization** and offers at-a-glance visibility into transaction and payment performance.

Payment Link Logs

Every transaction or API interaction is logged in the **Payment Link Log** for traceability and troubleshooting.

Each log entry contains:

- **Document Type**
- **Document No.**
- **Payment Link ID**
- **Response Message**
- **Timestamp**

Administrators can use this log to identify connectivity or configuration issues and ensure reliable payment processing.

Authentication Setup

To establish a secure connection with Peach Payments, you will need to configure the following in Business Central.

Steps:

1. Log in to your **Peach Dashboard**.
2. Navigate to **Payment Links**.
3. Generate or retrieve your credentials from the **Settings** tab:



- **Client Id**
 - **Client Secret**
 - **Merchant Id**
 - **Entity Id**
4. Enter these values on the **Peach Payments Setup** page.
 5. Ensure **Sandbox Mode** is enabled for testing, and disabled for live usage.

Authentication Type

- The integration uses **expiring tokens** for all API requests.
- Each outgoing request requires a valid token, if it expires, an Oauth request supplies a new valid token.
- This ensures that all requests are authenticated, tamper-proof, and trusted by the Peach Payments API.

8. Best Practices

- Always test in **Sandbox Mode** before deploying to production.
- Regularly monitor the **Payment Link Logs** for failed transactions.
- Use **restrictions** to prevent posting unpaid documents for better cash flow control.
- Schedule the **Job Queue** for continuous synchronization of payment statuses.
- Limit FactBox visibility via **Personalization** to users who manage payments.

Version Information

Detail	Information
Add-on Name	Peach Payment Links
Publisher	Binary Lab (Pty) Ltd
Supported Product	Microsoft Dynamics 365 Business Central
Release Date	November 2025