

The SaaS Payment Links Checklist

Before You Start: Scope the Job

- ☐ Confirm what you're selling through the link: a one-time product, a subscription, or both.
- ☐ List the countries your buyers pay from, so currency and tax needs are on the table from the start.
- ☐ Decide who owns sales tax and VAT today — you, an accountant, or a platform — and whether that scales.
- ☐ Note which systems the payment must update automatically: CRM, billing, or accounting.

Step 1: Choose a Payment Platform

- ☐ Verify the platform generates payment links for subscriptions, not just one-time charges.
- ☐ Check it supports multiple currencies and local payment methods for every region you sell to.
- ☐ Decide between a PSP (you own tax and compliance) and a MoR (the platform takes care of them).
- ☐ Confirm the link can connect to your billing, CRM, or accounting records.
- ☐ For international sales, confirm who registers, calculates, and remits VAT before the first link goes abroad.

Step 2: Create the Link and Set Product Details

- ☐ Select the product and choose the checkout page design and language the buyer will see.

- ☐ Set the price and enable each currency you sell in, so buyers see their local amount.
- ☐ Choose the billing type: a single charge, or a recurring monthly or annual interval.
- ☐ Apply any discount and set an expiration date for a time-limited offer.
- ☐ Pre-fill known customer details (name, email, country) to shorten checkout where possible.
- ☐ Attach a tracking tag so each payment ties back to its campaign or channel.
- ☐ Create a separate link for each plan and price point rather than editing one link repeatedly.
- ☐ Generate a test link and confirm the product name, price, and currency display correctly before going live.

Step 3: Customize the Checkout Page

- ☐ Add your logo, brand color, and product name so the page matches the site the buyer came from.
- ☐ Make the price, currency, and billing frequency visible without scrolling.
- ☐ Offer the buyer's local language, currency, and preferred payment method.
- ☐ Open the link on a phone and confirm it renders cleanly — most link clicks arrive on mobile.
- ☐ Show accepted payment methods and security indicators near the pay button.
- ☐ Confirm the page carries PCI DSS compliance, encryption, and tokenization through your provider.
- ☐ Three-second test: can you tell what you're buying and for how much? If not, the buyer can't either.

Step 4: Share the Link on the Right Channel

- ☐ Pick the channel that fits the moment: email for follow-ups, SMS for urgency, chat for live deals, social for campaigns.
- ☐ Send the link inside the existing thread where the buyer already agreed, not a fresh message.
- ☐ Add one line of context next to the link: what it is, the amount, and what happens after payment.
- ☐ For a fixed-price plan, reuse one link across the campaign so every recipient pays through the same URL.
- ☐ Time the send to when buyer intent is highest — right after a demo, quote, or approval.

Step 5: Track, Reconcile, and Troubleshoot

- ☐ Turn on a notification for every successful payment and route it to the right person or system.
- ☐ Connect payment data to your CRM, billing, or accounting tool so records update without manual entry.
- ☐ Review link performance — clicks, completed payments, and drop-offs — to see what converts.
- ☐ If a link fails, check whether it expired or was already used, then reissue a fresh one.
- ☐ For declined payments, offer local currency and more payment methods, and enable automatic retries.
- ☐ If a payment succeeds but records don't update, verify the integration is active and re-sync.
- ☐ For any chargeback, keep the payment confirmation and delivery record on file.

3 Things to Consider

1. Pick a platform that handles subscriptions, currencies, and tax — not just one-time charges.
2. A Merchant of Record removes tax, fraud, and compliance work from your team on every cross-border link.
3. Frame each shared link with price and context, then track completions to see what converts.