Payment/Refund Requests

This is where you are able to send Payment Requests and Refund Requests, and track each of them.

A **Payment Request** is where you are **collecting money** from the Recipient. It allows you to send out a Request via email to a Recipient for a set amount. The Recipient will click on the link embedded in the email, which brings them to a Payment Page where they will then input their credit card information to complete the payment.

A **Refund Request** is where you are **returning/refunding money,** and you are requesting that the Recipient provide the credit card number to which the refund should be sent. The Recipient will receive an email where they will click on the embedded link and be brought to a Payment Page where they will input the credit card that the refund should be applied to. All Refund Requests require that the Recipient correctly enter the Secret Answer (a word/password that is set by you - *refer to Help Page under Send Refund Request for more details*).

Tracking your Requests

Your Requests are organized into three reporting groups:

- **Outstanding:** Requests that have been sent but have yet to be completed by the Recipient. These include requests with a status of Expired and Security.
- **Paid:** Requests that have been successfully completed. They are automatically moved over to the Paid group.
- **Cancelled:** Requests that have been cancelled by you. You must manually select the Cancel button to move a request from Outstanding to Cancelled.

Request Overview

Click on the Recipient's Name for an overview of the request and to view further details such as its history.

Status

Each Request can have a different status:

Refund	Signifies that this request is a Refund Request

Expired	A request that has expired. You will need to either Cancel the request or select Modify & Resend in order to change the Expiry Date and have a new link sent to the Recipient.
Security	A status applicable only to Refund Requests, and it occurs when the Recipient has entered the wrong Security Answer three times. You will need to either Cancel the request or select Modify & Resend in order to reset the request.

Actions

Depending on the reporting group you are viewing and the status of the request, there are different Actions available:

- 👁 **Preview:** View the Payment Page

- ✎ **Modify & Resend:** Edit the Request and/or Resend

- ✉ **Send Email Reminder:** System will send out an email reminder to the recipient

- 🔗 **Share Link:** Copy the URL/Link for the Payment Page

- ✕ **Cancel:** Delete the Request

Frequently Asked Questions

Do Payment/Refund Requests expire?

A Payment Request can be valid for a maximum of 45 days. When creating a new Payment Request, you will be required to set the Expiry Date. If you need to extend a Payment Request, select Modify and choose a new Expiry Date.

A Refund Request is only valid for a maximum of 7 days.

How do I resolve a request with a Security status?

If one of your Refund Requests is showing a status of Security, that means that the Recipient entered in the incorrect Secret Answer at least three times.

Before resolving the request, please ensure that you are sending the Refund Request to the correct e-mail address and that the Recipient knows the Secret Answer.

One confirmed that the Refund Request is being sent to the correct individual, select "Modify & Resend" under Actions, and simply send the Request again. You may want to choose a new Secret Answer or update the Expiry Date.