Send a Payment Request

A **Payment Request** is where you are **collecting money** from the Recipient. It allows you to send out a Request via e-mail to a Recipient for a set amount. The Recipient will click on the link, be brought to the Payment Page, and they will input their credit card information to complete the payment.

Required Fields

The following fields must be completed for each Request:

Name of Recipient: This is the name of the person who you are sending the Payment Request to. This does not have to match the name on the credit card.

Email Address: This is the email address for the Recipient where the Payment Request will be sent to.

Amount: The amount of the Payment that the Recipient's credit card will be charged.

Expiry Date: This is the date that the Request will expire at 11:59pm EST. For example, if the expiry date is October 16th, the Request can accept a payment up until 11:59pm EST on October 16th. Payment Requests can be active between 1 and 45 days.

Optional Settings

You may choose to configure the following settings:

Enable Automatic Reminders: This option enables automatic payment reminder emails to be sent out to the recipient at the chosen interval (e.g., every 7 days) until the payment is either completed or expires. Use the drop down to customize the frequency of reminders. At any time, you can shut off or modify the automatic reminders. You can also track when the next reminder will be sent out by looking at the Request's Overview page.

(Alternatively, you can manually initiate sending a payment reminder using the Action button on the Payment Request home page).

Do not pass processing fees onto the customer: This setting will only appear if you are on a CustomerPay pricing plan. The default is to have the processing fees passed onto the customer, however, you can override this by selecting the box, in which that case, you will be responsible for paying the processing fees for that transaction.

Optional Fields

Both the **Invoice Field** and **Description Field** are optional and are designed to give you flexibility. You may use the fields how you choose.

The Invoice Field and Description Field each have two fields within it: **Field Label** and **Value**

- The **Field Label** refers to the Label attached to the field and is used to either (a) describe the information in the Value field, or (b) provide instruction for what should be inputted in the Value field (if you choose to use field to collect information from the Recipient).

- The **Value** field refers to the information within that field and can be used to either (a) display information, or (b) collect information from the Recipient. To collect information from the Recipient, simply leave the field blank when you are completing the Payment Request form.

The **Invoice Field** is intended for Invoice Numbers, Program Names, and the alike. If the Payment Request is associated with another transaction, by inputting the same Invoice Number in the Value, you will be "grouping" the transactions together which is helpful for reporting purposes. The Invoice Field can have a maximum of 20 characters in the Value.

The **Description Field** is intended for detailed information such as a player's name, preferred position and the alike. It can have a maximum of 30 characters in the Value, making it suitable for collecting more detailed information.

Below is an example of using both fields to display information:

Collecting Information

You can use both the Invoice Field and Description Field to collect information from the Recipient. To do so, check off the box to include the field and provide a Field Label. You must leave the Value field blank and check the Required box.

Below is an example:

Previewing the Payment Page

> Before sending the request, you will be able to view the payment page through selecting "Preview"

Below is an example of the Payment Page when **Sending a Payment Request:**

Frequently Asked Questions

Example of completing the form

Below is an example of completing the form:

Optional Fields

☑ Add Invoice Field ⓘ

Field Label: ⓘ

`Division Name`

E.g. Invoice, Program, etc.
Maximum 20 characters

Value: ⓘ   ☐ Required ⓘ

`GirlsAAA`

E.g. U13Tryouts, 2023GirlsU13, etc. or leave it blank to use
the field to collect information from the customer.
Maximum 5-20 numbers & letters, no spaces or
punctuation.

☑ Add Description Field ⓘ

Field Label: ⓘ

`Name of Child`

E.g. Description, or Instructions for customer
Maximum 20 characters

Value: ⓘ   ☐ Required ⓘ

`Sally Smith`

E.g. Small jersey, remaining balance, etc. Or, leave it
blank to use the field to collect information from the
customer.
Maximum 30 characters.

Below is an example of how the above completed form appears on the Payment Page. You will see the ==Field Label is highlighted in yellow== and the ==Value is highlighted in blue==:

Pay with Credit Card

Name	Example Test
Email	test@test.com
==Division Name==	==Girls AAA==
==Name of Child:==	==Sally Smith==
Pay Now:	$ 150.00

Example of completing the form to collect required information from recipient

Below is an example:

Optional Fields

☐ Add Invoice Field ⓘ

☑ Add Description Field ⓘ

Field Label: ⓘ

`Name of child:`

E.g. Description, or Instructions for customer
Maximum 20 characters

Value: ⓘ   ☑ Required ⓘ

` `

E.g. Small jersey, remaining balance, etc. Or, leave it
blank to use the field to collect information from the
customer.
Maximum 30 characters.

Below is an example of how the above completed form appears on the Payment Page. You will see the ==Field Label is highlighted in yellow== and the Value is a form field for the customer to input.

Pay with Credit Card

Name	Example Test
Email	test@test.com
Name of child:	
Pay Now:	$ 220.00

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