

Send a Refund Request

A **Refund Request** is where you are **returning/refunding money** and you are requesting that the Recipient provide the credit card number that the refund should be sent to. The Recipient will receive an email where they will click on the 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 set by you.

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 Refund 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 Refund Request will be sent to.

Refund Amount: The amount that will be refunded to the Recipient's credit card.

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. Refund Requests can be active between 1 and 7 days.

Secret Answer: A secret answer (i.e. a word, phrase or password) decided by you that the Recipient will have to provide in order to claim the refund. This provides an added layer of security. The Recipient has 3 chances to correctly input the Secret Answer otherwise the Request is put in Security status requiring you to reactivate it.

Secret Hint: A hint or clue provided by you to assist the Recipient in providing the correct Secret Answer. It cannot contain any word from the Secret Answer.

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 2 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:

Optional Fields

☒ Add Invoice Field ⓘ

Field Label: ⓘ

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

Value: ⓘ ☐ Required ⓘ

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: ⓘ

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.

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:

Optional Fields

☐ Add Invoice Field ⓘ

☒ Add Description Field ⓘ

Field Label: ⓘ	Value: ⓘ <input checked="" type="checkbox"/> Required ⓘ
<input type="text" value="Name of child:"/> E.g. Description, or Instructions for customer Maximum 20 characters	<input type="text"/> E.g. Small jersey, remaining balance, etc. Or, leave it blank to use the field to collect information from the customer. Maximum 30 characters.

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 Refund Request**:

Demo League

Is offering a credit/refund for you to claim on your credit card

Credit/Refund

Amount

\$ -20.00

City we live in

Just making sure this is you!

John Smith

test@test.com

Name On Card

cardholder name

Card Number



Expiry

Year

Enter card number

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Your card data is securely managed

CVV

3 digits on the back
of your card

Cancel

Send

sportspay

Frequently Asked Questions

How do I cancel a Refund Request?

If a Refund Request is still Outstanding, meaning that it has not been claimed by the recipient, navigate to the Request and select "Cancel". The Recipient will no longer be able to access the link.

You cannot cancel a Refund Request once it has been completed. Once the Recipient has claimed the Refund and completed the Request, the transaction is final.

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