Quick start guide

allpay Recurring Payments within Callpay quick start guide

Please navigate to the website address **https://www.callpay.net** and reference this document.

User Permissions

1. Select **Create New User** or **View Users > Edit** from the **Admin** tab
2. Under **User Privileges**, tick **Recurring Transactions** in order to activate Recurring Payments for this User
3. The Recurring Transaction option will now be visible when the User takes a payment.

Selecting a Recurring Payment

1. After entering the **PRN** or **Client Reference** within Callpay, select the customer wishing to make a payment
2. Click **Next** under **Schedule a Recurring Payment**
3. The **Create Customer Profile** page will be displayed.

Step 1 – Create Customer Profile

1. The **PRN** is pre-populated from the account selected within Callpay. It is not possible to edit the PRN here
2. Enter the customer's **First Name** and **Last Name**, then select their preferred method of contact for notifications: **Email** or **SMS**
3. Click **Save** after entering their email address or mobile phone number
4. If the email address or mobile number does not already exist in allpay's database, the User is taken to the **customer's account**.

Step 2 – Edit Customer Profile

1. If the email address or mobile number already exists in allpay's database, a message is displayed to confirm the PRN which this is set up against
2. To add the PRN against the existing customer profile, select **Yes**
3. If **No** is selected, a unique email address or mobile number must be entered for the customer
4. It is possible to update the **First Name**, **Last Name** and **notification preference** for an existing customer by clicking ✎

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Step 3 - Select Payment Method

1. If no bank card is currently saved in the customer's profile, select **Add Card**
2. Enter the **Card Number**, **Expiry Date**, **Security Code** and **Cardholder's Name**, then click **Save Card**
3. Select **Continue** on the next page to return to the home page
4. Once the card has been saved, the card number is obscured in order to comply with Payment Card Industry Data Security Standards (PCI DSS)
5. Select the **radio button** ⭕ next to the bank card to be used for the recurring payment.

Step 4 - Payment Schedules

1. Select **Add Schedule** below Payment Schedules
2. Choose whether the payment schedule is to be **Ongoing** (with no end date) or **Fixed** (with an end date, or for a limited number of payments).

Ongoing Schedules

1. Select a **Start Date** for the Payment Schedule; this must be in the future, but not more than three months ahead
2. Enter the **amount** to be paid for each transaction
3. Select the **frequency of payments**: Weekly, Fortnightly, Monthly, Quarterly, Annually. (The weekly and fortnightly payment is taken on a set **day**. The monthly, quarterly and annually payment is taken on a set **date**)
4. Select **Submit** and read out the script to confirm the details to the customer, before clicking **Confirm**
5. The details of this recurring payment are displayed in the **Payment Schedule**. It is possible to edit ✏ or delete 🗑 this schedule by selecting the appropriate button.

Note: when editing an ongoing payment schedule, the new start date must be at least 12 days in the future

Fixed Schedules

1. Select a **Start Date** for the Payment Schedule; this must be in the future, but not more than three months ahead
2. Enter the **total amount** to be paid - this will be the total sum of the full schedule
3. Select the **frequency of payments**: Weekly, Fortnightly, Monthly, Quarterly, Annually. (The weekly and fortnightly payment is taken on a set **day**. The monthly, quarterly and annually payment is taken on a set **date**)
4. Enter either an **End Date** or the **Number of Payments** to be made
5. Select **Submit** and read out the script which contains a calculation of the payment schedule to confirm the details to the customer, and click **confirm**
6. The details of this recurring payment are displayed in the **Payment Schedule**. It is possible to edit ✏ or delete 🗑 this schedule by selecting the appropriate button.

Note: when editing an ongoing payment schedule, the new start date must be at least 12 days in the future

Email and SMS Notifications

1. Your customer will receive a notification via **email** or **SMS** in the following circumstances:
   - When a **new** recurring payment schedule is created
   - When a payment is due to be taken **more than six months** after the previous payment
   - When a **change** is made to the recurring payment schedule
   - When the recurring payment schedule is **closed**
2. All notifications will include the **name of the organisation** and **details of the payment** (if applicable).

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