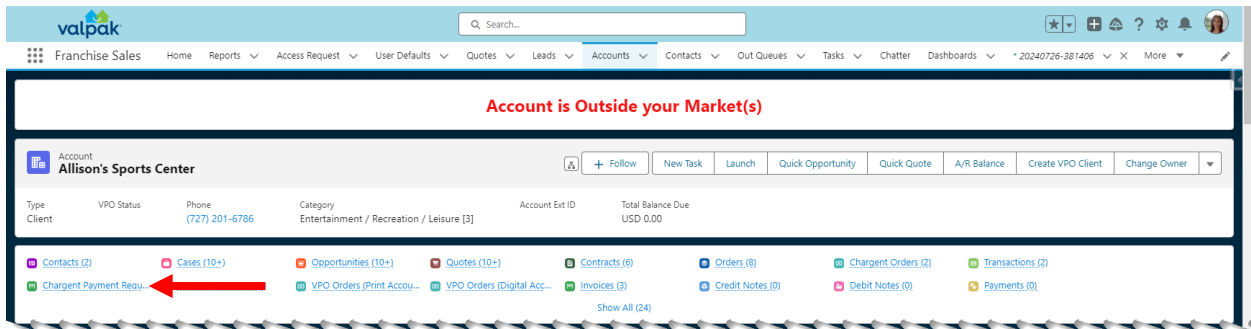
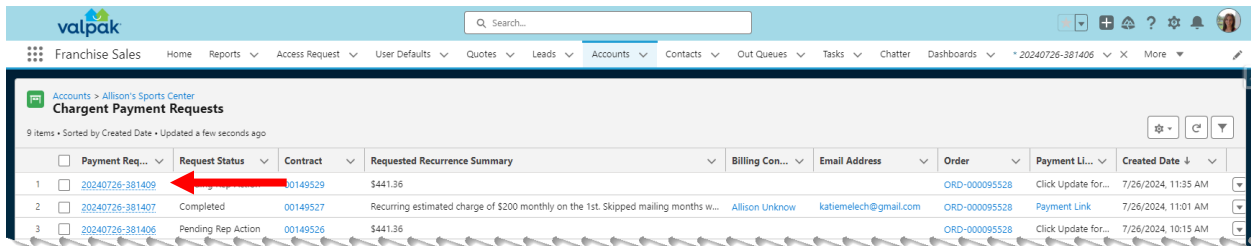


Chargent Payment Request: Update for Wizard

1. On the Account record, click on Chargent Payment Request related hyper link.

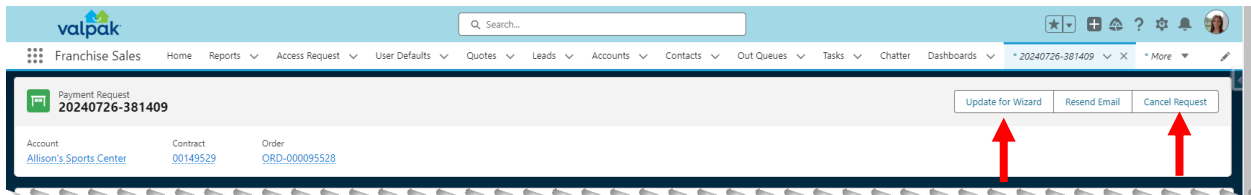


2. Select the Payment Request Name that is Pending Rep Action.



3. If the Client is paying with a Paper Check, click Cancel Request.

4. If the Client is paying with a CC or ACH, click Update for Wizard.



5. Recipient:

- Leave the Send Payment Request Email to Client? box checked.
- You must select a contact that is in Salesforce.
- If the Client wants to have it to send to an email that is not in Salesforce, enter that in the Email override field.

RECIPIENT

Send Payment Request Email to Client? ⓘ

* Contact to Notify

Allison Unknow | katiemelech@gmail.com

Email - If both a contact is selected and an email entered, the email will only go to the manually typed email address.

6. Consent:

- a. Product to be Charged – select an option or leave as “All”.
- b. Payment Recurrence:
 - i. **One Time** – Client is using different payment methods, Client is paying their contract in full, ect.
 - 1. One Time Charge Amount - make sure the amount is correct.
 - 2. One Time Requested Date – If they want to be charged right away, leave blank. If they prefer a day of the month, add that date.

CONSENT

* Product to be Charged

All

* Payment Recurrence ⓘ

One Time

* One Time Charge Amount - Prepopulated with first bundle amount if available

\$441.36

One Time Requested Date - Leave BLANK if you want charge to be immediately upon consent submission.

- ii. **Fixed Recurring** – Client wants to set up payment and not have to think about it for the rest of the contract.
 - 1. Frequency – Monthly/Weekly.
 - 2. Recurring Charge Amount – will populate with 1st bundle amount.
 - 3. Preferred Billing Day of the Month – what day do they want to be billed on?
 - 4. Normal Pay Schedule – ALWAYS Before mailing.

CONSENT

* Product to be Charged

All

* Payment Recurrence ⓘ

Fixed Recurring

* Frequency

Monthly

* Recurring Charge Amount - Prepopulated with first bundle amount if available

\$441.36

Combine same month charges? Additional mailings will be combined to a single charge each month. If additional mailings exist and box unchecked, you MUST submit one time payment requests for additional mailings.

* Preferred Billing Day of the Month ⓘ

1st

* Normal Pay Schedule - Indicate if your client typically pays before or after mailing.

Before

- iii. **One Time + Fixed Recurring** – Combines the 1st 2 options mentioned above. Can be used if you want to collect a deposit and set the rest of the payments as recurring.

CONSENT

* Product to be Charged

All

* Payment Recurrence ⓘ

One Time + Fixed Recurring

* Frequency

Monthly

* One Time Charge Amount - Prepopulated with first bundle amount if available

\$441.36

One Time Requested Date - Leave BLANK if you want charge to be immediately upon consent submission.

* Recurring Charge Amount - Prepopulated with first bundle amount if available

\$441.36

Combine same month charges? Additional mailings will be combined to a single charge each month. If additional mailings exist and box unchecked, you MUST submit one time payment requests for additional mailings.

* Preferred Billing Day of the Month ⓘ

1st

* Normal Pay Schedule - Indicate if your client typically pays before or after mailing.

Before

- iv. **Flat Amount Recurring** – Client wants to make equal payments over a specific a number of payments.

1. Frequency – Monthly/Weekly.
2. Recurring Flat Amount – how much is the Client paying for each payment.
3. Number of Payments – How many payments is this spread across.
4. Preferred Billing Day of the Month – what day do they want to be billed on?

CONSENT

* Product to be Charged

All

* Payment Recurrence ⓘ

Flat Amount Recurring

* Frequency

Monthly

* Recurring Flat Amount

\$147.12

* Number of Payments

3

* Preferred Billing Day of the Month ⓘ

1st

c. Notes:

- i. **Client Additional Notes** – Notes will show on the email that is sent to the Client with the Consent form.
- ii. **Consent Internal Notes** – Notes for the team doing the actual charge.

7. Click Submit.

NOTES

Franchise Payment Request Notes - Automatically included in email:

Help us go paperless! Valpak is transitioning to electronic payment consents. This collaborative effort will ensure your payment information is always securely stored and easily accessible. Your time and effort towards this endeavor are greatly appreciated.

Client Additional Notes - Included in email to client if email sent and consent wizard if enabled. Best practice is to call out what consent will cover (Plus One, Blue Envelope, Past Due Invoices, etc) especially if multiple consents needed.

Consent Internal Notes - Notes to person doing actual charges. Not visible to client.

Submit