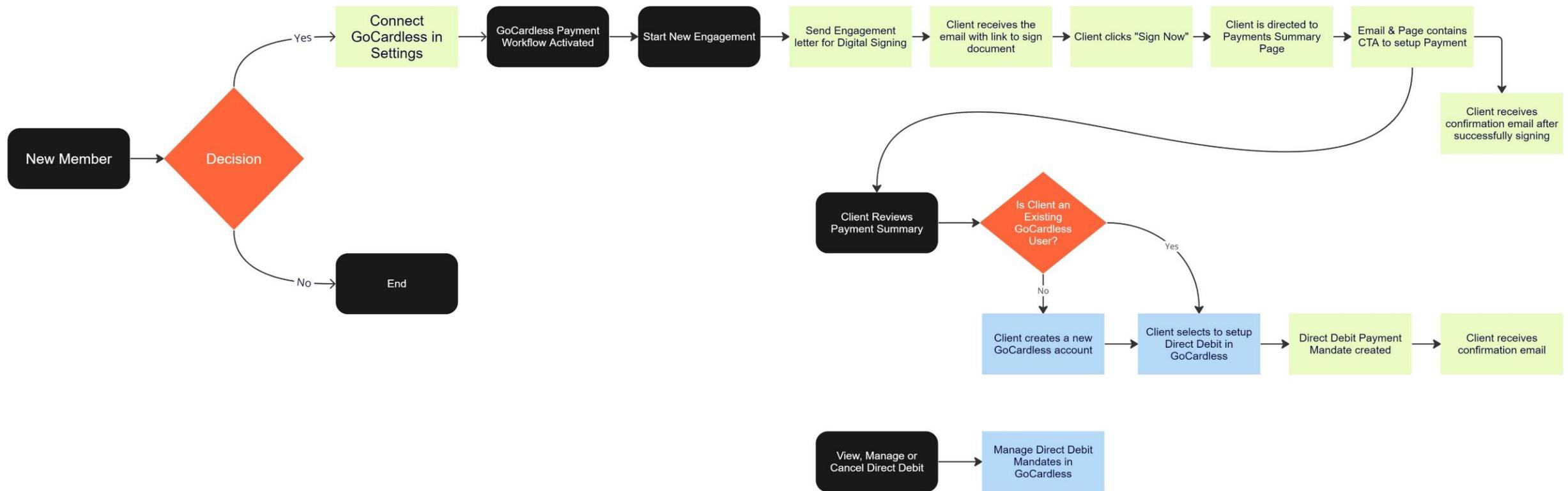


GoCardless Direct Debit Payment integration with Engage



Use the ChangeGPS Engage to create a new Engagement letter and add your services & fees
On 5. Produce tab select to download to send your letter manually OR send using digital signing

Be sure to setup your GoCardless API for an integrated client payment workflow*

**Integrated payment options are only available once an Engagement has been signed*

Engage

Home / Engage / New Engagement

1. Engage Info 2. Client Details 3. Preview 4. Collate 5. Produce

Save For Later

SAVE WIZARD

File Name:

2021-07-13 - Engage - Realfire Pty Ltd

Digital Signing External or Manual Signing

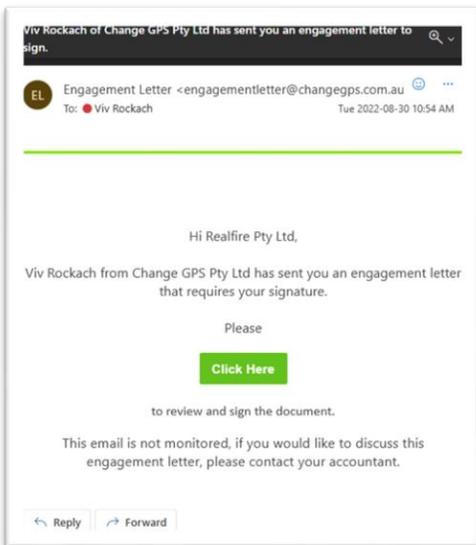
Send for Signing Manual Sending

SEND PDF DOWNLOAD PDF

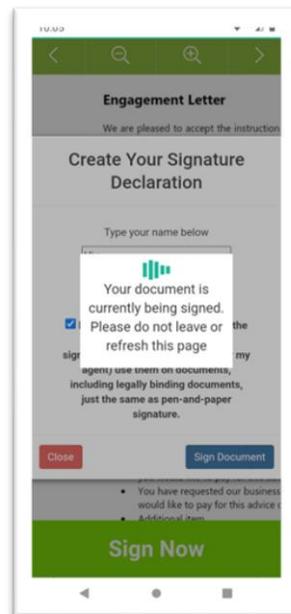
Go to Page 2

Go to Page 3

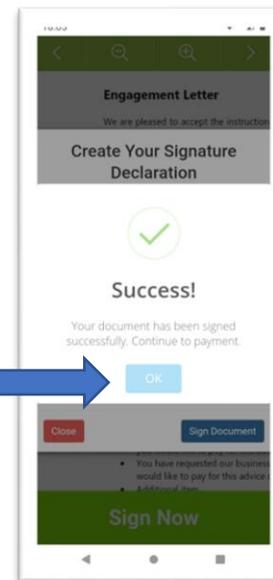
Workflow for Digital Signing and Direct Debit Payments with GoCardless



1. Client receives email with Click Here to sign prompt



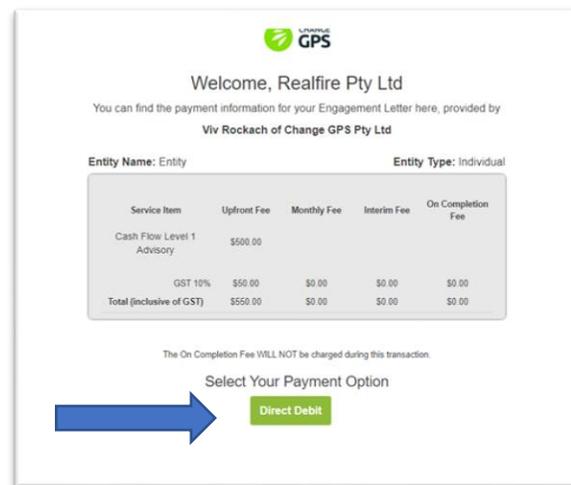
2. Client reviews then digitally signs to accept terms



3. Once confirmed and if payment options are connected, client is prompted click OK to continue to payment setup



4. Client also receives confirmation email with Click Here to pay now prompt

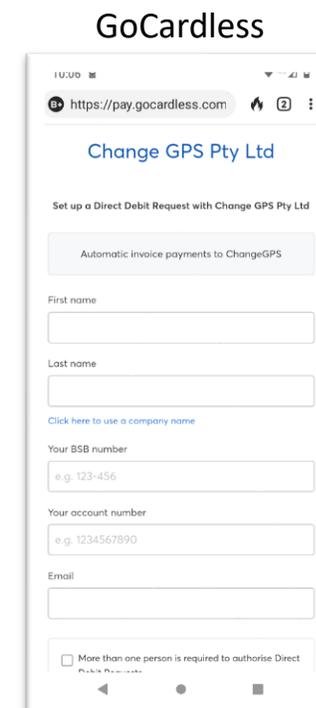


5. Payment Summary Page with options for client to select method



6. GoCardless hosted page where client enters details to setup payment

7. View, Manage and Cancel DD mandates In GoCardless



Direct Debit with GoCardless available for Monthly, Upfront & Interim Fees only

Workflow for Manual Signing and Direct Debit Payment Process

After downloading letter to send for manual signing (or to use external digital signing method) find entry on Engage dashboard
Click on Actions button to view options:

711	Viv Rockach	29/06/2021 10:47 am	Bean Roasters Pty Ltd	Fixed Price	\$1,100.00	\$0.00	\$0.00	\$0.00	Awaiting Signature	N/A	Manual Signing	No	Actions
-----	-------------	---------------------	-----------------------	-------------	------------	--------	--------	--------	--------------------	-----	----------------	----	---------

1. Actions:
Click to confirm signed document received

Letter #711 - Actions

Document

Download → Confirm Signed Document

Upfront Payments

Create Payment Link Confirm Payment Received

Disengage Actions

Letter #711 - Actions Success

Your document has been confirmed as Signed

OK

Close

2. Once receipt of signed document is confirmed the Create Payment Link button will be active (*if GoCardless connected)



Letter #879 - Actions

Document

Download Unsigned Document Document Has Been Signed

Upfront Payments

Create Payment Link Confirm Payment Received

Disengage Actions

Letter #711 - Actions

Here's your link. Send it to your client.

<https://changetech.cloud/engage-payments?key=Tic4fxc&email=vivrockach@changegps.com>

OK

Close

3. Click on Create Payment Link

Copy link and send via email (opens a web page)

GPS

Welcome, Realfire Pty Ltd

You can find the payment information for your Engagement Letter here, provided by Viv Rockach of Change GPS Pty Ltd

Entity Name: Entity Entity Type: Individual

Service Item	Upfront Fee	Monthly Fee	Interim Fee	On Completion Fee
Cash Flow Level 1 Advisory	\$500.00			
GST 10%	\$50.00	\$0.00	\$0.00	\$0.00
Total (inclusive of GST)	\$550.00	\$0.00	\$0.00	\$0.00

The On Completion Fee WILL NOT be charged during this transaction.

Select Your Payment Option

Direct Debit

4. Client enters details to setup payment

5. View, Manage and Cancel DD mandates In GoCardless



GoCardless

https://pay.gocardless.com

Change GPS Pty Ltd

Set up a Direct Debit Request with Change GPS Pty Ltd

Automatic invoice payments to ChangeGPS

First name

Last name

Your BSB number

Your account number

Email

More than one person is required to authorise Direct

Direct Debit with GoCardless available for Monthly, Upfront & Interim Fees only

Resending Payment Requests for Signed Engagements

Engage Dashboard

Home / Engage / Engage Dashboard



Download Report

Send New Engagement

Search By Creator

Search By Client

Letter ID	Created By	Date Created	Client	Type	Upfront Total	Monthly Total	Interim Total	Completion Total	Status	Approval Date	Send Type	ID Cited?	Actions
952	Leo Iermano	12/07/2021 2:32 pm	Realfire Pty Ltd	Fixed Price	\$825.00	\$0.00	\$0.00	\$0.00	Awaiting Signature	N/A	Digital Signing	Yes	Actions

After selecting to send letter for Digital Signing – navigate to Engage Dashboard and click on Actions

Resend Payment Request will re-send the email to prompt user to make payment

Letter #870 - Actions

Document

Resend Signature Request Download Signed Document

Upfront Payments

Resend Payment Request Confirm Payment Received

Disengage Actions Close

After selecting to send letter for Manual Signing – navigate to Engage Dashboard and click on Actions

Create Payment Link enable you to copy link and send via email to user to make payment

Letter #879 - Actions

Document

Download Unsigned Document Document Has Been Signed

Upfront Payments

Create Payment Link Confirm Payment Received

Disengage Actions Close

