



Digital Payment Request –Merchant Guide

V 1.1 Date 26/05/2022



Introduction

Digital Payment Request Journey

Create Request



>>

Send Request



>>

Consumer Views Request



>>

Consumer Pays for the Request



>>

Get Paid



Digital Payment Request

For a merchant, 'Digital Payment Request' is a simple way to request payment from the customers, paying for goods or services outside of traditional online purchases.

Through a link or a button, it can be sent to the customer to enable them to make a payment securely. Such link can be sent via email, app, text, or embedded in the invoice.

By clicking the payment request, customers can choose to pay from a variety of payment methods.

Features

A Merchant User can:

Create, Copy, View, Retire and Resend Payment Request

Send Payment Request via email

Search Payment Requests using the available search criteria

Handle Attended Transactions for example when customer agent is in voice / chat contact with the consumer when the payment is being made.

An ISV can optionally access all above features via the Evolve platform APIs and make them available to the merchants from within their own environment

Benefits

Free - This feature is available to all merchants at no additional cost.

With reduced overhead costs, secure payments, ability to promote products and services at a fraction of the cost, better customer experience – omnichannel and convenience for both merchants and customers the Digital Payment Requests is a brilliant way to get paid for your products and services.

Merchants can handle attended transactions (e.g., on call payments) and assist the customers during payment journey.



Portal Guide – Screen layouts

Pay360 by Capita

Merchant ID - 11002237 - Uma's Retail Foods | Uma

Payment Requests

+ Create Request

Payment Request **100** Refresh Reset

Created on ↓ All time	Unique reference number Search	Amount Search	Request status All	Sent by All	Description Search	Reference Search
<input type="checkbox"/> 21 Apr 2022 12:33:00	100-000-149	£ 1,232.00	✓ Paid	Email	Uma1232	Uma1232
<input type="checkbox"/> 21 Apr 2022 12:31:13	100-000-134	£ 1,230.00	✓ Paid	Sent Manually	Uma1230	Uma1230
<input type="checkbox"/> 14 Apr 2022 10:11:03	100-000-148	£ 333.00	✓ Paid	Sent Manually	Uma133	Uma133
<input type="checkbox"/> 13 Apr 2022 17:04:19	100-000-147	£ 175.00	📧 Paying	Email	Uma111	Uma111
<input type="checkbox"/> 12 Apr 2022 12:57:34	100-000-146	£ 1,256.00	✓ Paid	Email	Uma1256	Uma1256
<input type="checkbox"/> 12 Apr 2022 12:53:35	100-000-145	£ 1,253.00	✓ Paid	Sent Manually	Uma1253	Uma1253
<input type="checkbox"/> 12 Apr 2022 07:12:00	100-000-133	£ 123.00	📧 Paying	Email	dhrupal100	asdasda

You can view your existing payment requests and create new requests through tab 'Payment Requests'

Pay360 by Capita Merchant ID - 15687013 - L | Test Email

Payment Requests

Create request

Fields marked with an asterisk (*) are required.

Payment details

Currency *
GBP

Amount *
175.00

Reference
Uma114

Description *
1 X Shoes Size 9
2 X Sox
2 X Shoe care

Actions

Send payment request by *
 Email Send manually


Email *
Suntharalingam.Umasuthan@capita.com

Expiry date *
13/04/2022 21 days to expire


Is this transaction attended?

Submit Request Cancel

Payment request created

 Payment request created successfully

<https://shared.pay360.dev/ddcjaguars/mp-fe-payment> **Copy link**

 1

Email sent to Suntharalingam.Umasuthan@capita.com

Done

+ Create another request

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Once you have created a request, you have an option to 'Copy link' or 'Create another request'.



Get Started
Activate your account



Dashboard



Transactions



Payment Requests



Payouts



Account >



Notifications



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Payment

Payment request details



Description	Uma1232
Expiry date	01 May 2022
Total amount	£ 1,232.00



Created

Email sent
21 Apr 2022 12:33:02



Viewed

21 Apr 2022 12:33:30



Paid

21 Apr 2022 12:35:15



<https://secure.test.pay360evolve.com/payment-request/YVpO8QjLVFkIxr5>

Copy link

+ Create Request

Refresh

Reset

Description

Reference

Search

Search

Uma1232

Uma1232

Uma1230

Uma1230

Uma133

Uma133

Uma111

Uma111

Uma1256

Uma1256

Uma1253

Uma1253

dhrupal100

asdasda

Select Payment Request and you can view when each action (created, viewed, paid) was carried out.



Transaction details



Onboarding Corp merchant has sent you a payment request

Unique reference number	100-000-150
Reference	Uma244
Description	Uma244
Total amount	£ 244.00

Pay now

Once your customer clicks payment request, they are taken to the 'Mini site' with transaction details and payment options.



Transaction details



Onboarding Corp merchant has sent you a payment request

Unique reference number	100-000-150
Reference	Uma244
Description	Uma244
Total amount	£ 244.00

Card details

Card number*

Card number is mandatory

Expiry date*

Security code*

Cardholder name*

Billing address

Address line 1*

Address line 2*

Address line 3

On pay now the customer sees Payment page



Thank you, your payment was successful

Transaction details

Onboarding Corp merchant has sent you a payment request

Transaction ID	148109
Unique reference number	100-000-134
Reference	Uma1230
Description	Uma1230
Total amount	£ 1,230.00

On successful payment a message is displayed to the customer.

Transaction progress

Transaction details	
Unique reference number	100-000-135
Reference	U444
Description	U444
Expiry date	26 May 2022
Total amount	£ 444.00

- Created**
26 Apr 2022 18:36:40
- Viewed**
26 Apr 2022 18:36:48
- Paying**

If attended transaction, you can see the payment progress as customer performs the relevant actions.



Get Started
Activate your account



Dashboard



Transactions



Payment Requests



Payouts



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Payment Requests

+ Create Request

Payment Request **102**

Refresh

Reset

Copy Link

Retire

Created on ↓ All time	Unique reference number Search	Amount Search	Request status All	Sent by All	Description Search	Reference Search	
<input checked="" type="checkbox"/>	29 Mar 2022 19:38:41	100-000-078	£ 65.00	Sent	Email	65	65
<input type="checkbox"/>	29 Mar 2022 19:36:15	100-000-077	£ 700.00	Sent	Email	700	700
<input type="checkbox"/>	29 Mar 2022 19:35:06	100-000-085	£ 876.00	Sent	Email	876	876
<input type="checkbox"/>	29 Mar 2022 19:34:55	100-000-084	£ 4,658.00	Sent	Email	dv	Fries
<input type="checkbox"/>	29 Mar 2022 19:34:36	100-000-083	£ 987.00	Pending	Sent Manually	987	987
<input type="checkbox"/>	29 Mar 2022 19:34:04	100-000-076	£ 778.00	Sent	Email	778	778
<input type="checkbox"/>	29 Mar 2022 19:33:39	100-000-075	£ 567.78	Expired	Email	8768758	87576

A wrong payment request can be retired, by selecting the link and choosing the 'Retire' option.



Get Started
Activate your account



Dashboard



Transactions



Payment Requests



Payouts



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Payment Requests

+ Create Request

Payment Request **55**

Refresh

Reset

Created on ↓ All time	Unique reference number Search	Amount Search	Request status Retired, Expired	Sent by All	Description Search	Reference Search	
<input type="checkbox"/>	28 Mar 2022 13:07:51	100-000-032	£ 234.00	Retired	Email	EEEEEEE	EEE234
<input type="checkbox"/>	28 Mar 2022 13:06:48	100-000-031	£ 889.00	Expired	Email	WWWWW	WWW
<input type="checkbox"/>	28 Mar 2022 13:06:03	100-000-030	£ 987.00	Retired	Sent Manually	QQQQQ	QQQ
<input type="checkbox"/>	28 Mar 2022 13:05:02	100-000-029	£ 888.00	Expired	Email	Uma888	Uma888
<input type="checkbox"/>	28 Mar 2022 12:59:12	100-000-028	£ 101.00	Expired	Email	demo	demo
<input type="checkbox"/>	28 Mar 2022 12:54:04	100-000-026	£ 200.00	Expired	Email	UAT data	
<input type="checkbox"/>	28 Mar 2022 12:52:17	100-000-025	£ 101.00	Expired	Email	demo	demo

You can see the retired/expired payment requests by filtering on 'Request status'.



Get Started
Activate your account



Dashboard



Transactions



Payment Requests



Payouts



Account >



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Settings >



Help >

Transactions

Selected **71**

Refresh

Reset

Export

Date ↓ All time	Amount Search	Type All	Status All	Description Search	Customer Search	Method Card
05 May 2022 11:58:26	£ 789.00	Payment	Successful	Uma789		Card
03 May 2022 10:42:10	£ 123.00	Payment	Successful	123		Card
03 May 2022 05:25:02	£ 123.00	Payment	Successful	dhrupal3May		Card
02 May 2022 11:05:29	£ 150.00	Payment	Successful	asdas		Card
27 Apr 2022 11:55:13	£ 777.00	Payment	Successful	U777		Card
26 Apr 2022 17:38:43	£ 444.00	Payment	Successful	U444		Card
26 Apr 2022 14:18:01	£ 244.00	Payment	Successful	Uma244		Card

The paid payment requests are displayed in the transactions tab.

Your Software platform can change the following default settings for you through the APIs

- Default Expiry Days - defaults to 30 days, can be changed to what you require.
- Logo - Your logo on the payment page for your customer. We recommend that logos follow the below requirements i.e. the logo in JPEG / PNG / SVG format and file size up to 1MB
- Merchant Name (i - enter merchant name) - If should first check for trading name and if not present it should prepopulated with Legal name.
- Terms URL - the link to the terms URL
- Email ID - Support email id for customer queries if different
- Contact Number - support contact number if different, in the following format
+442073457895
- Address - provide address if different, to what was already provided

The API documentation is available in [Evolve API Reference \(pay360evolve.com\)](https://pay360evolve.com).

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