Attendee payments

> **<** Want to jump to a particular section? Use the contents tab to the right of this article

Our integrated payment gateway is now available! Find out more here.

eventsairpay

✈️ **Ready to move up to First Class?**

Your EventsAir environment is about to be upgraded for greater security & reliability!
You may need to make small adjustments to your set up.

Learn now the upcoming Azure migration may impact this feature, and what actions may be needed.

If you're going to charge a fee for any aspect of your event, you need to plan the process of collecting and managing your payments. Your payment acceptance process may be simple or complex, depending on your event, and your organization.

Before collecting payments

First, review your set up. You'll need to consider creating the following:

- **Tax Code(s)** – Depending on your country or region's tax practices, you may be charging tax on some or all items. Usually, you need to set up your taxes and payment types before creating any registrations or contact records.
- **Payment Types** – You may decide to only accept cash or checks for one event, and only allow MasterCard or Visa payments for another. So, before you start building your event, you should set up your payment types (in the Setup panel of your event, under Financial).
- **A Payment Gateway** – in order to accept online credit card payments, you'll need:
    - **A Merchant Services Account** – The dedicated official merchant credit card account provided by your bank or other financial services company. This Merchant account must be in the name you want to appear on your attendee's credit card statement. You may also be able to manually enter credit card numbers and receive approvals by phone, credit card swipe terminal, and via the Merchant account online website.
    - **e-Commerce Gateway** – You need an e-Commerce (Payment) Gateway so you can accept credit card numbers on your website and communicate the card information to your merchant account for approval,

in a very secure and protected way. You are responsible for organizing and covering the cost of your external Payment Gateway.

Read more about External Connections including Payment Gateways in this article.

Use this link to jump straight to the payment gateways section of that article.

Settings for your e-commerce (payment) gateways

Before creating payment settings within your event, check your **Application Setup** area (which covers settings across all your events).

If you haven't already got an e-commerce gateway set up, from the start screen, choose **Application Setup** (you'll only see this if you're an Admin for your EventsAir account).

- Under SYSTEM SETUP, open **External Connections**.
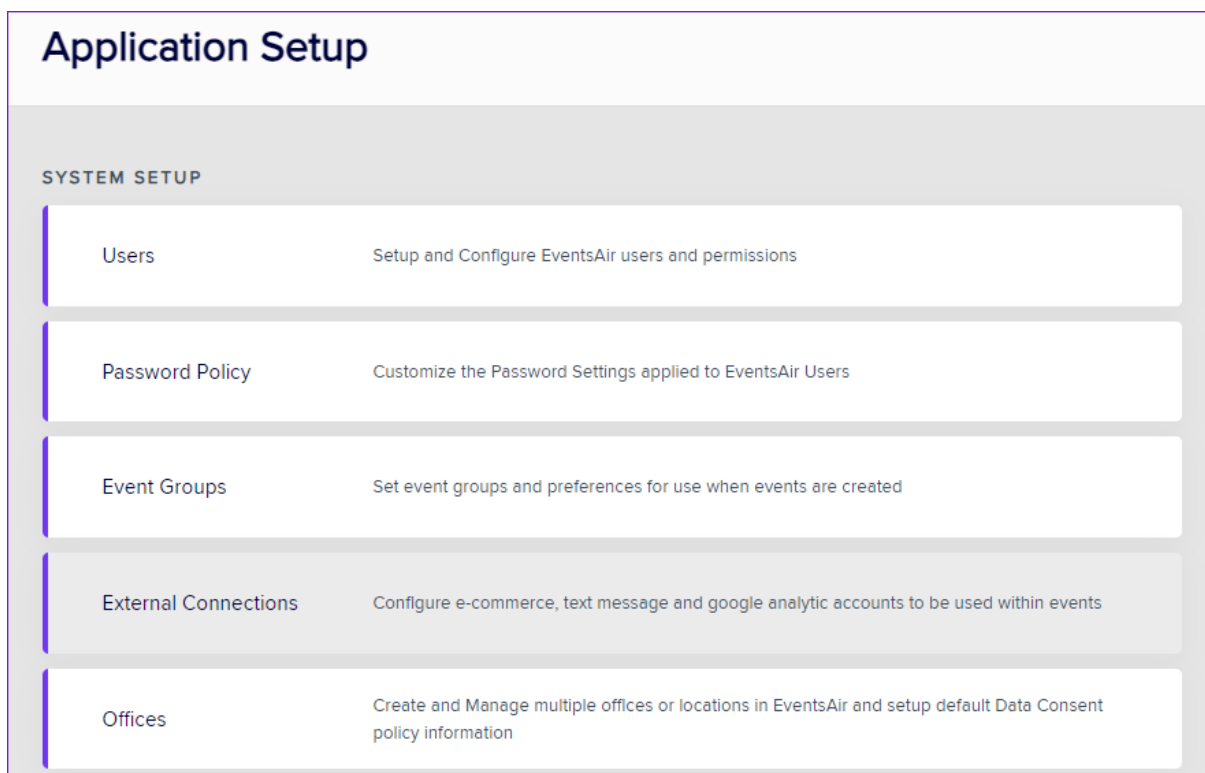
- Select the **E-Commerce Gateway Setup** option (the plus icon).
- Enter a name and select your Payment Gateway.
- Enter the details your Gateway Provider has supplied (such as Merchant ID and access code).

Enabling an e-commerce gateway for a specific event

1. From the **Setup panel,** under SYSTEM SETUP, select **Event.**
2. Select **Preferences.**
3. In the **External Connections** tab, for **E-Commerce Account,** select the correct **Payment Gateway.**

4. Add in your own internal **E–Commerce Reference** (this will be what appears in your e-commerce gateway statements as the reference for transactions relating to this event).

Create overall tax settings

NOTE: Even after setting up a default tax here, you should also check when creating any fee types or payable items (in Registrations, Functions, Accommodation etc.) that the appropriate taxes have been added to that item. Look under the Advanced tab for each payable item. You can also remove or vary the tax on each item in this way.

1. Go to the **Setup Panel** (in your event).
2. Select **Financial** under **System Setup.**
3. Select the + icon to the right of **Taxes.** You'll need to define your region's tax code(s) and percentage(s).
4. Enter and save your **Tax Details** for your country or taxing authority.

Setting up Payment Types

While you're still in the **Setup Panel,** under **Financial (in System Setup):**

1. Select the + icon to the right of **Payment Types.** Here's where you need to create payment types for all the various ways in which you plan to accept payments for your event: for example, cash, check, direct deposit, and various credit cards.
2. Enter and save your Payment Types, such as MasterCard, Visa, American Express, Cash, and Check. Be sure to select the correct Funding Type for each type of payment accepted.
3. You should consider checking the box next to **Confirm Amount During Payment Entry.** This is a good safeguarding process to confirm amounts before processing.
4. Use the default **Credit Card Fee** accounts and **Bank Accounts** for now. When you set up your chart of accounts for budgeting and expenses, you can update these settings very quickly.

Add the Payment Page to your Interactive Site

Click and drag a Payment Page section onto your site. You can enable and disable credit cards or pay later options.

Testing your online payment and refund system

When enabling your e-commerce gateway, you also have the option to enable E-Commerce Test Mode. We recommend you set a reminder to double-check it's been switched off before your event.

Enter several test transactions and confirm with your credit card gateway service that the charges are correctly being transmitted.

Turn off Test Mode and enter several small test transactions (creating a function type for $1.00 is a good way to do this). Process the transaction, and follow it to your credit card gateway service, and then to your merchant account.

Then test refund process. You should refund the test charge in EventsAir and process it to confirm it's being transmitted both to the credit card gateway service and to your merchant account.

> **Note:** Based on your merchant account and credit card gateway's policies, as well as your own organization's practices, you may consider processing refunds in a regularly scheduled time frame. An authorized party would run a Refund Due report, which shows refunds needing to be processed. This party would process refunds directly in the Credit Card Gateway or in the Merchant Account, and then enter the details for each transaction in EventsAir. No matter what your policies are, you want to be sure to control the refund process carefully and make sure all data is being processed and recorded accurately. You can read more about refunds in this article.

To process a payment manually

First, locate the correct attendee record, and check the appropriate module(s) to ensure that payment is due.

1. Select the **Financials Action** button 💳 on the right.
2. By default, the **Financials** window will only show outstanding fees. You can select the **Show All** button to see all transactions, inclusive, no charge, or payment required.
3. Select each item you want to apply a payment for. Double check that the amount of your credit card or check payment equals the amount displayed as **Outstanding.**

> **Note:** There are times where a check may be submitted for more than one attendee. EventsAir allows you to pay for multiple attendees with one check. Select the Add Attendee button to add the additional Attendee record(s) until you have all applicable charges displayed, which must match the amount on the check or credit card charge.

5. If you're using **Payment Batches**, you can use the current batch or select **New** to set a new Payment Batch number. [Read more about Payment Batches below.]

6. Select your **Payment Type** (for online payments, you're entering in details and an authorization code that you actually process in your payment gateway, or directly with your Merchant Account).
7. Select **Save Payment** and close the window.

You can look at the appropriate Module in the Attendee Record to confirm that payment has been applied.

Attention to detail when manually processing payments

Sometimes you may receive a check in the mail for payment, or an attendee may submit a payment form (for example, by fax due to security concerns). So, you may have a few checks on your desk to process, or a couple of credit card charges that you've submitted to your processor and received an approval code for. In either case, you need to enter that payment information accurately and consistently every time; otherwise you'll have inaccurate records and spend many hours researching and backtracking your payment processing. For this reason, you should set up your own processes (some kind of confirmation or double-checking) to ensure this is done in a timely and accurate manner.

Payment Batches

Payment batches are a way for organizers to categorize their financial transactions for a specific time period. For example, you may wish to run banking deposit reports every day, or once a week.

By assigning a payment batch number for a specific series of payments and refunds, you can easily filter against a specific payment batch. This makes your banking and financial reporting much easier to handle, audit, and report against.

The **Open/Close Payment Batches** utility in Express Actions will let you open and close batches as required.

Enabling Payment Batches

To track Payment Batches, you will need to select **Track Payment Batches** in the Financial Setup section, under preferences:

Entering and tracking Payment Batches

Tracking payment batches occurs when you receive payments. In the **Financials Quick Action**, you can enter an existing batch number, or select **New** to create a new batch number.

You will want to create your own internal workflow around **Payment Batches**. Your workflow will take into account the frequency of adding new **Batch Numbers** and how each batch correlates to your financial deposit activity and reporting.

You can view the current Payment Batch activity by viewing the **Payment Batch Widget** on the Dashboard, as shown here:

When you're running Financial Reports, you can filter on **Payment Batch numbers**.

Opening and closing Payment Batches

You can open, close, and re-open Payment Batches in the **Open/Close Payment Batches** Express Action**.** To open or

close a payment batch, run the Express Action and choose the **Payment Batch** you want to manage.

Then select the correct action for a specific batch. You can always re-open and re-close **Payment Batches** if needed (in cases where a payment was associated with an incorrect Batch Number).

You'll also need to ensure you have the right permissions in **Application Setup – Users** to re-open payment batches.