COLLECT PAYMENT

PURCHASES

January 2024

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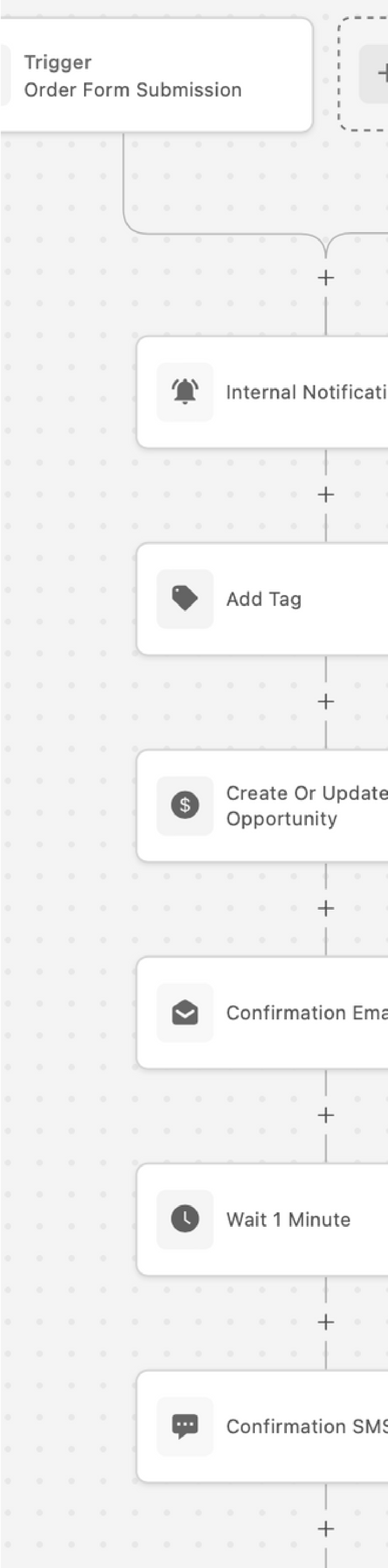
01

INTRODUCTION

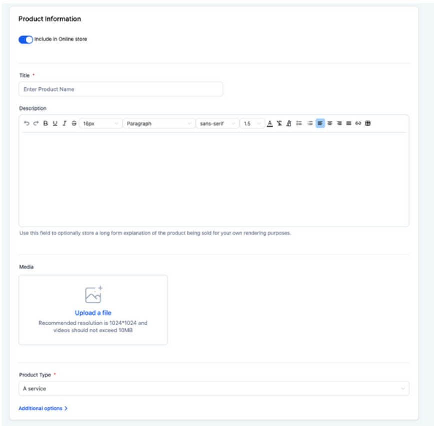
In this guide, we'll take you through all the necessary steps to ensure a smooth user experience. You'll learn how to integrate with your payment gateway, create products, and start collecting payments effortlessly.

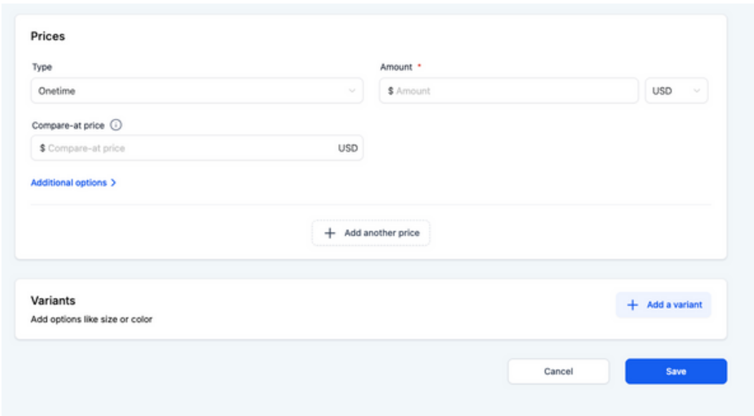
Integration	Connect your payment gateway account to the software to sync products & transactions such as Stripe, Paypal, NMI, Authorize.net, etc.
Products	A product, service or digital item that is available for purchase.
Prices	A single offer type with a set amount, you can create different prices for different audiences.
Coupons	Create discount codes to offer your audience with special offers or promotions.
Order Form	An element that is added to a funnel or website page in order for customers to checkout & purchase.
Invoice	A feature in the system that allows you to collect payments directly from a specific contact.
Text To Pay	A feature in the system that allows you to collect payments directly from a specific contact over SMS.



02

SETUP YOUR PRODUCTS





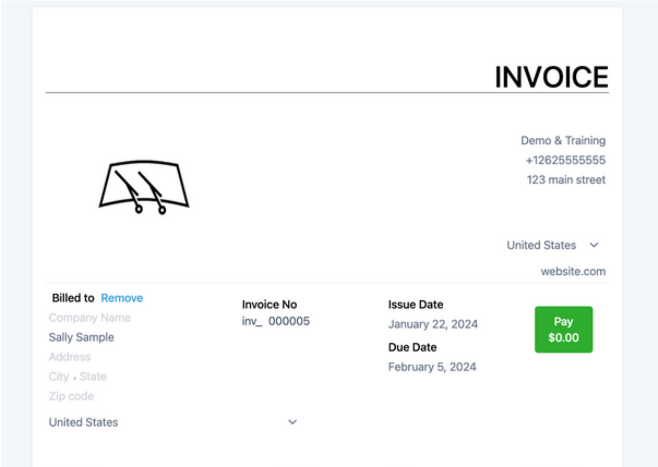
1. To create a new product, access the "Products" tab under the "Payments" tab. You can import existing products from your payment gateway or create a new product by clicking the "Create New Product" button.

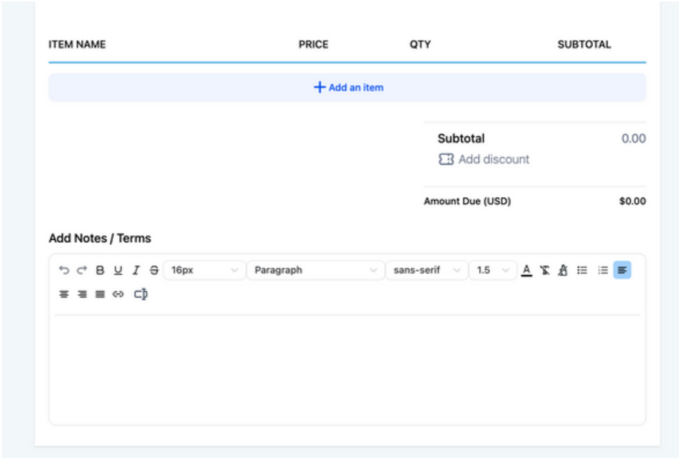
2. When launching a product, provide key details such as the product name, description, image, type, and price. Ensure that the price reflects the value and quality of your product.

- **Product Name:** Give your product a clear name that communicates its value.
- **Description:** Provide a detailed and compelling description of your product. Highlight its unique features, benefits, and how it can solve your customers' problems.
- Image: Enhance the visual appeal of your product by uploading an eye-catching image.
- **Type:** Choose the most appropriate type of product that aligns with your offering. Consider whether it is a physical product, a digital download, a service, or a membership.
- **Price:** Set the initial price for your product. Ensure that the price reflects the value and quality of your product.
- **Additional Prices:** Increase the appeal of your product by offering different pricing options. This can include one-time payments, subscriptions, or flexible payment plans to cater to various customer preferences and budgets.
- **Setup Fees:** If any setup fees are associated with your product, clearly specify them to avoid any confusion or surprises for your customers.
- **Trial Period:** Capture the interest of potential customers by offering a trial period.

03

CREATE AN INVOICE





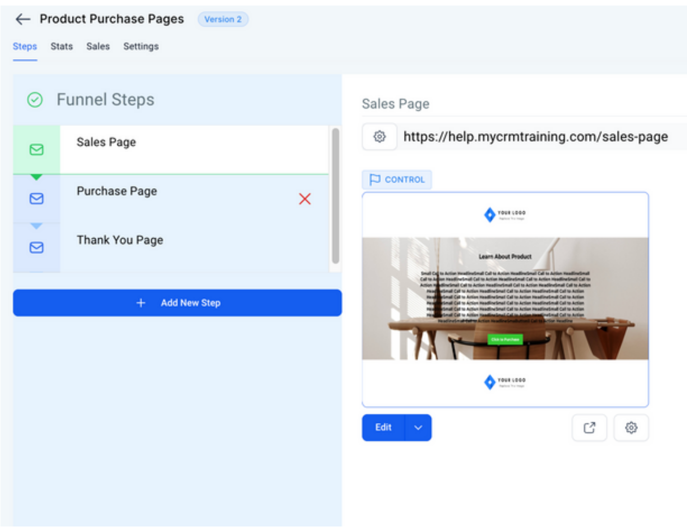
1. **Access Invoicing:** Begin by logging in to our platform and navigating to the Payments tab, which will grant you access to the invoicing section.
   - Create New Invoice: Within the invoicing section, you can "Create New Invoice." Click on this button to initiate the process.

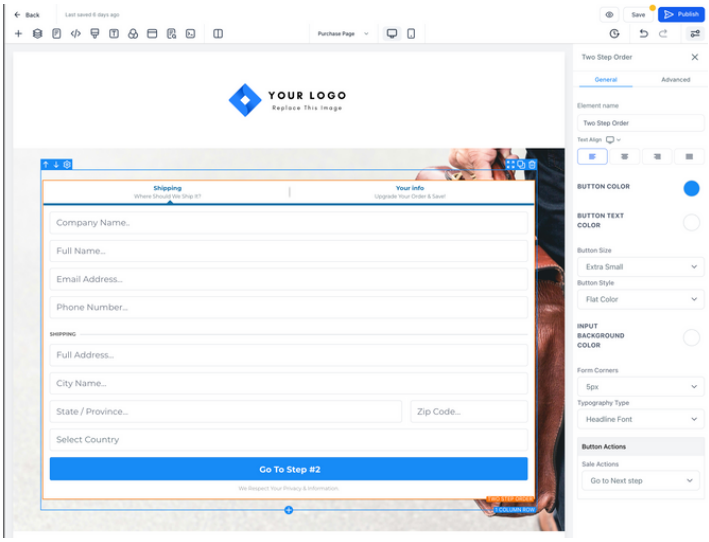
2. **Fill in Essential Details:** Enter all the necessary details, including client information, invoice date, due date, and payment terms. Providing accurate and comprehensive information ensures your clients have all the details they need for payment processing.
   - **Add Line Items:** Specify the products or services provided in the invoice. Include detailed descriptions, quantities, rates, and applicable taxes. This level of specificity ensures transparency and helps your clients understand the value they are receiving.
   - **Automated Total Calculation:** Our software will automatically calculate the total amount based on the provided line items, saving you time and eliminating the possibility of calculation errors.
   - **Customization Options:** Personalize your invoices by adding your company logo and any additional notes or terms relevant to the transaction. This customization enhances the professional appearance of your invoices and clarifies your clients.

3. **Preview and Send:** Before finalizing the invoice, it is crucial to review all the information to ensure accuracy and professionalism. Once satisfied, you can send the invoice directly to your client from our platform, streamlining the process.

04

CREATE YOUR SALES/CHECKOUT PAGE





1. **Access Your Funnel or Website Page:** Log in to our platform and navigate to the "Sites" section. Select the funnel or website page where you would like to sell your products.

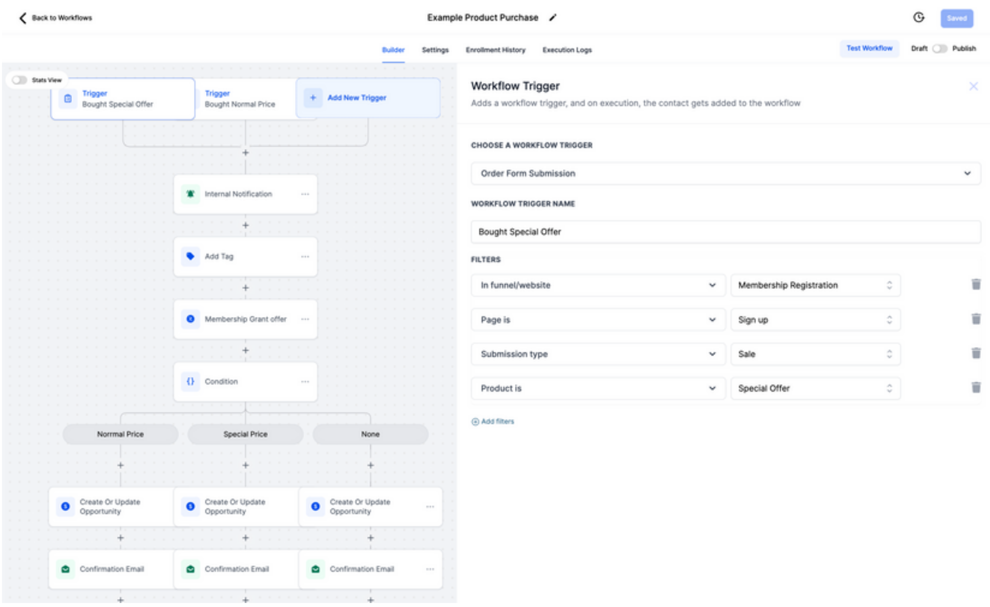
2. **Add Your Products:** Once you've selected your funnel or page, locate the option to add your products. In funnels, you can find this under the "Products" tab. On the website page, click the three dots to access the "Products" tab. If you've already created your products within our platform, they will be listed for easy selection. Choose the product(s) you wish to sell and other relevant information to help potential customers make informed decisions.

3. **Customize the Checkout Process:** Make the checkout process as smooth as possible by adding a one or two-step order form to collect payment and contact information. Maximize revenue by incorporating coupons, upsells, and order bumps. Customize these elements to align with your business goals.

4. **Create a Thank You Page:** A well-designed thank you page is critical, it presents an opportunity to provide further instructions, access to resources, or additional offers. Customize your thank you page and redirect your order form to it. Utilize custom fields to personalize the page with the contact's name and order details.

05 PART 1

CONFIGURE WORKFLOW TRIGGERS



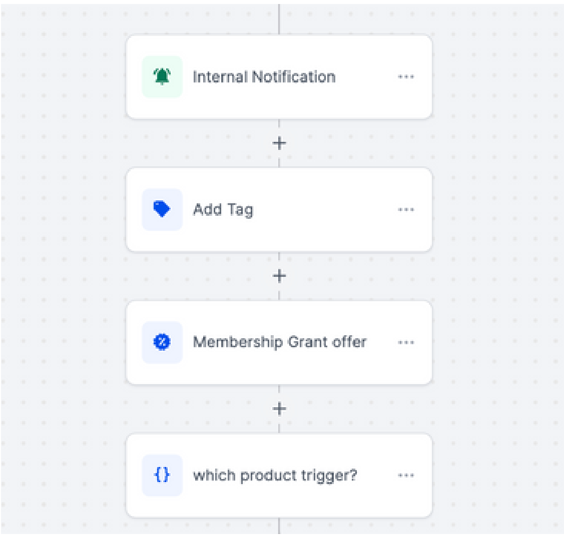
1. **Start Creating Your Workflow:** To start building your automated product purchase workflow, go to the "Automation" section in the left tab. Click on "+Create Workflow".

2. **Configure Basic Settings:** Go to the "Settings" top tab in the newly created workflow. Here, you can customize basic settings such as the message-sending window to avoid middle-of-the-night alerts and the name and email address from which messages will be sent. Additionally, you can toggle the "allow re-entry" and "stop on response" options to control how many times contacts can enter your workflow.

3. **Add Workflow Triggers:** When creating your workflow, navigate to the "Actions" top tab and add triggers to determine when the automation should activate. A commonly used trigger for a product purchase workflow is "Order Form Submission."
   - However, you can enhance the precision of your triggers by utilizing filters. These filters allow you to specify the funnel or website, the exact site page, the specific product purchased, and even the submission type.
   - By incorporating these filters, you can ensure that your workflow activates only when it is genuinely needed, optimizing the efficiency and effectiveness of your automation.

05 PART 2

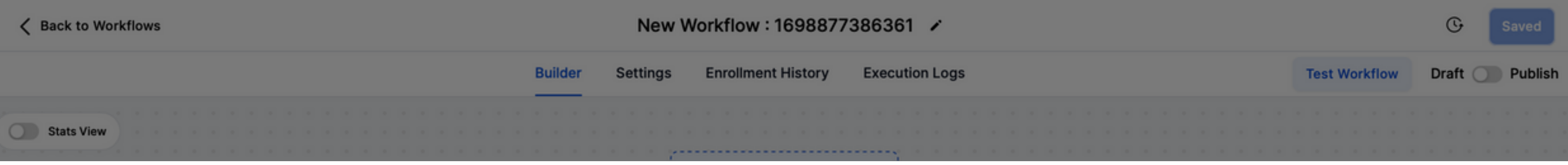
CONFIGURE WORKFLOW ACTIONS



1. **Define Workflow Actions:** Now, let's add actions to your workflow. These actions are crucial as they determine the system's tasks automatically. When setting up a product purchase workflow, there are various actions that you can include to enhance the customer experience and streamline the process.
   - Some examples of these actions include **tagging contacts based on their purchase, sending confirmation and follow-up emails to provide updates, sending SMS messages or voicemails for immediate notifications, updating or adding contacts to a pipeline for effective management, sending internal notifications to relevant team members, and much more.**
   - One of the key advantages of these actions is the ability to personalize your messaging to the contact and the specific order they have submitted. Custom fields and values can tailor your communications to provide a personalized touch, ensuring your customers feel valued and engaged throughout the purchasing journey.

2. Wait Steps delay actions from executing until a designated time
   - Choose & customize the "Time Delay" step to hold a contact until a specified time has passed since they entered that step or until a specific time

3. Test & Publish Your Workflow To Make It Live



TROUBLESHOOTING TIPS

MASTERING AUTOMATION WORKFLOWS ONE STEP AT A TIME

Have You Tested It?

To ensure your automation is configured to your liking, go through your process as a client would, using placeholder information. The log tabs, along with contact record data, can help you optimize your setup. Don’t hesitate to permanently delete your contact and try again to get it just right.

Have You Cleared Your Cache?

Updates pushed by your browser, system, or other services can fill up your browser cache. Clearing your cache solely removes data stored on your device from the websites and apps you visit, with no influence on your photos or saved files. A simple search for instructions depending on your browser you use will give you the directions you need.

Do Your Triggers Need Additional Filters?

To give more clarity to your workflow triggers, incorporate suitable filters that outline your requirements for it to execute. Merely having it set to trigger off of ”Form Submitted” is vague and doesn’t provide any specifics about which form is being referred to. Incorporating the ”form is” filter can help alleviate this issue.

Have You Sent A Loom Video To Support?

To expedite finding a solution, take advantage of loom.com as a communication tool when reaching out to the support team. The website provides us with valuable context about the issue, helping us help you more efficiently.

Is Allow Re–Entry On?

The ”Allow Re–entry” toggle in your workflow settings is responsible for allowing a contact to enter your workflow multiple times. Consider if this feature is necessary for your project and if you only need it temporarily for testing purposes.

Have You Looked Through Workflow Logs?

If you’re ever in need of troubleshooting a workflow, there are two tabs you can check out. Firstly, the Execution Logs tab will show you every step executed in chronological order for all contacts. Secondly, you can go to the Enrollment History tab to see each contact in your flow and which step they are currently on, as well as their next scheduled execution. These features are incredibly useful when it comes to tracking the execution of workflows.

Have You Checked Your Audit Logs?

When you access your account settings, take a look at the left side menu and scroll down to “Audit Logs” to view various logs and changes made to contacts, custom fields, values, and more. This feature is incredibly useful when you need to know who made a change, what was changed, and when it was changed.

Have You Tried An Incognito Tab or Other Browser?

If you’re experiencing issues with updates or your cache interfering with the system’s functionality, consider testing it out in an incognito private browser. This allows you to bypass the cache and start fresh. Another option is to use a different browser like Safari to see if the issue persists.

NEED MORE HELP?

CHECKOUT OUR SUPPORT OPTIONS & RESOURCES

Our team is fully dedicated to supporting you every step of the way, ensuring your success. You can review the wide range of resources and support options available to guide you through any challenges or inquiries. Don’t hesitate to reach out to our team whenever you need additional assistance; we’re always here to help!

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