

How to use Payer specific eDDR

Version 1.0

SPET 2021

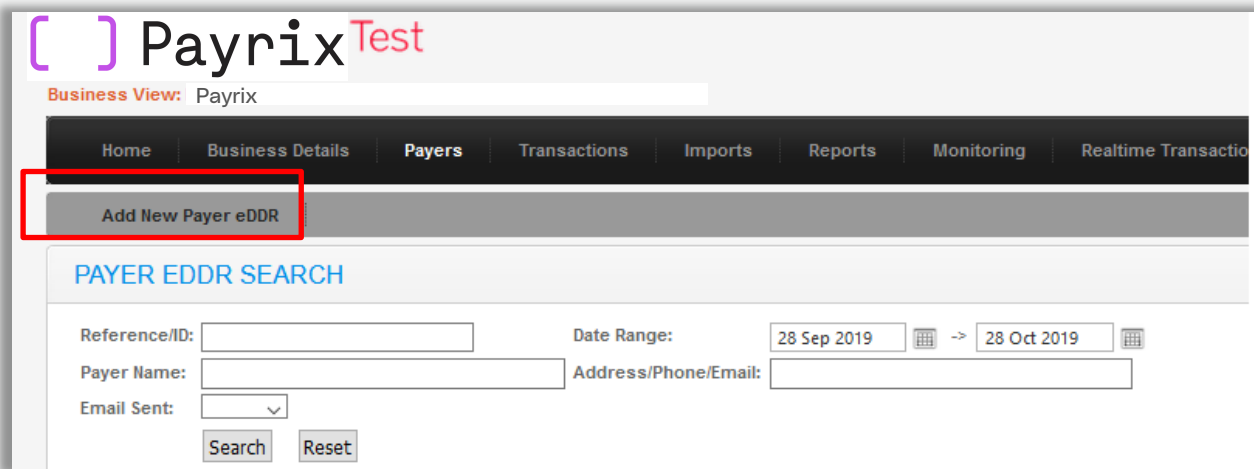
Australia: 1300 592 283 | admin@Payrix.com.au
New Zealand: 0800 480 054 | admin@Payrix.com.au
USA: 844-517-5981 | admin@Payrix.com.au

CREATING NEW

CREATE NEW

Click **Payer eDDR Requests**

Click **Add New Payer eDDR**



This will then load the page to enter the details of the payer who will receive the eDDR.

CREATING NEW

PAYER EDDR DETAILS

Payer eDDR Setup

Business: Craig Sandbox

Description: *

eDDR Template: Select eDDR Template: *

Payer Reference: *

First Name:

Last Name: *

Email: *

Phone:

Mobile:

Address:

Suburb:

State:

Post Code:

Country:

Schedule: Generate a new schedule

Expiry Date: *

Special Fields

The below fields take some more explanation:

- **eDDR Template** – This defines the look and feel of the template. Important for “new version” eDDRs and HPPs where you have Themes defined.
- **Schedule** – This is used to define how many and/or the value of payments the payer must make
 - Manual – The Biller will add Payments to the Payers schedule, as and when required.
 - Unending – Payments for the debiting \$ amount will be collected until the schedule is deleted or the payer is cancelled.
 - Limited by debit count - the schedule is set to deduct the amount of payments set in the “Limit schedule to” box.
 - Limited by debit amount – the schedule is set to continue debiting payment until the amount specified in the “Limit schedule to a total of \$” is reached.
- **Expiry Date** – This is the date that the eDDR must be completed by, after this date the link will become invalid.

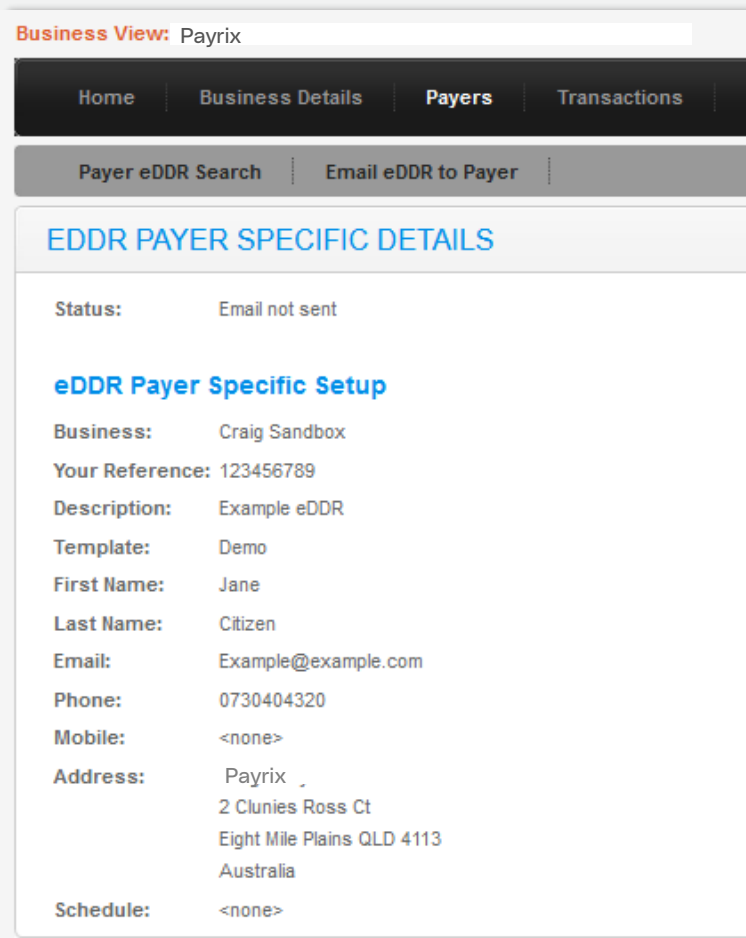
Please complete this page as desired and click save. Please note the red asterisk symbol denotes a mandatory field that must be completed. *

SENDING THE eDDR

SENDING THE eDDR

Once the eDDR has been completed with the payer's details, template, schedule and saved, a confirmation screen will display the information provided.

You will be presented with the confirmation screen.



The screenshot displays the Payrix web interface. At the top, there is a search bar with 'Business View: Payrix' and a navigation menu with 'Home', 'Business Details', 'Payers', and 'Transactions'. Below the navigation is a secondary menu with 'Payer eDDR Search' and 'Email eDDR to Payer'. The main content area is titled 'EDDR PAYER SPECIFIC DETAILS' and contains the following information:

Status:	Email not sent
eDDR Payer Specific Setup	
Business:	Craig Sandbox
Your Reference:	123456789
Description:	Example eDDR
Template:	Demo
First Name:	Jane
Last Name:	Citizen
Email:	Example@example.com
Phone:	0730404320
Mobile:	<none>
Address:	Payrix 2 Clunies Ross Ct Eight Mile Plains QLD 4113 Australia
Schedule:	<none>

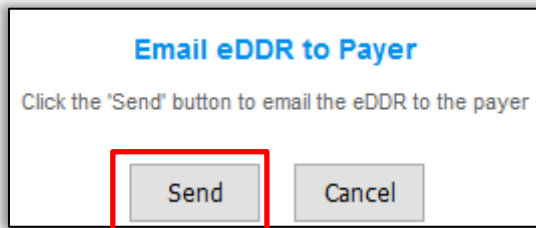
You do have the option to stop the process now and come back to this stage and send the email at a later date.

The eDDR can be sent to the payer via email if you are satisfied that the details are correct. Click the

Email eDDR to Payer button.

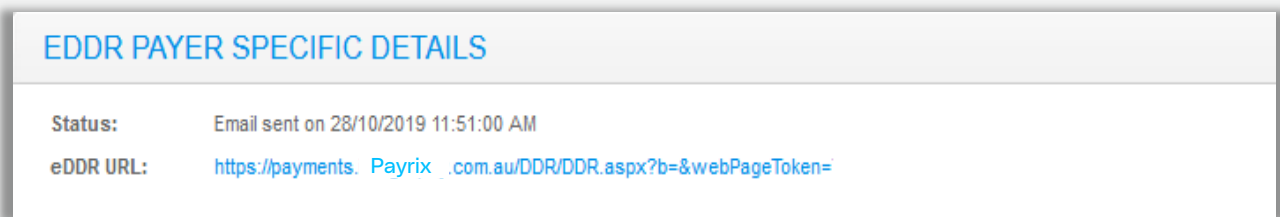
SENDING THE eDDR

To complete the process, click the final Send icon on the pop-up message.



SENT MESSAGE

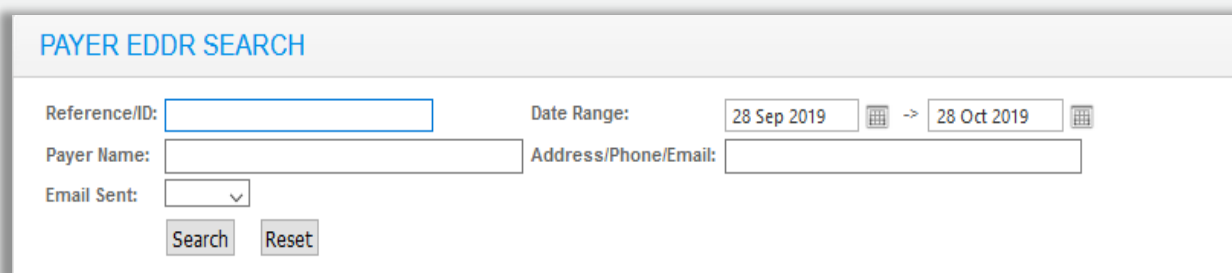
Once a message has been sent the Status will display as Email sent with the date it was sent. An eDDR URL will also be generated and displayed on the eDDR Payer Specific Details screen.



You now have the option to copy and paste the link and send via another medium if required. You also have the option to open the link to view the page your payer will receive.

PAYER eDDR SEARCH

After an eDDR has been created you have the option to search for it, you can then send, resend or check the status of the eDDR.



There are options to search via reference you created, Payer name, date range or address/phone email.

PAYER eDDR SEARCH

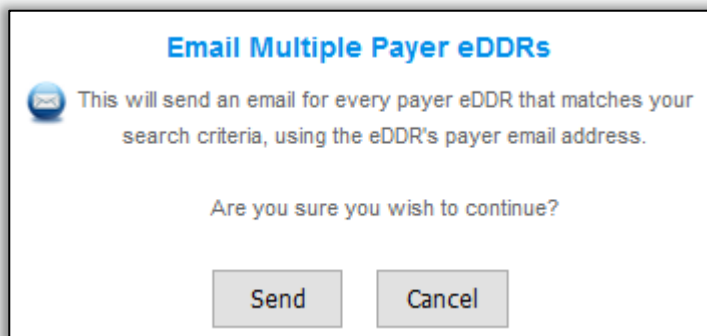
The email sent drop down will allow emails to be searched by emails that have been sent, not sent or failed to send. Once details have been entered click search to produce the list of payers that match the search criteria.

1 eDDR(s) found.

ID	Your Ref	Expiry Date	Schedule Start Date	Payer Ref	First Name	Last Name	Email	Phone	Mobile
135526	123456789	31-Oct-2019 <small>(MEDT #100)</small>	28-Oct-2019 <small>(MEDT #100)</small>	123456789	Jane	Citizen	Example@example.com	0730404320	

The Excel Icon  will export the search list to excel.

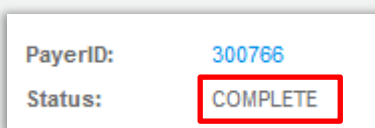
The Mail Icon  will email resend the eDDR email to all Payers in the Search List.



By clicking the ID row from the search list, the eDDR will open to show to display further details.

If a Status still shows “Status: Email sent on XXXXXXXXXX” the payer is set to complete the eDDR.

If a Payer has opened the eDDR and successfully entered details, you will see a Payer ID and a Status of complete.

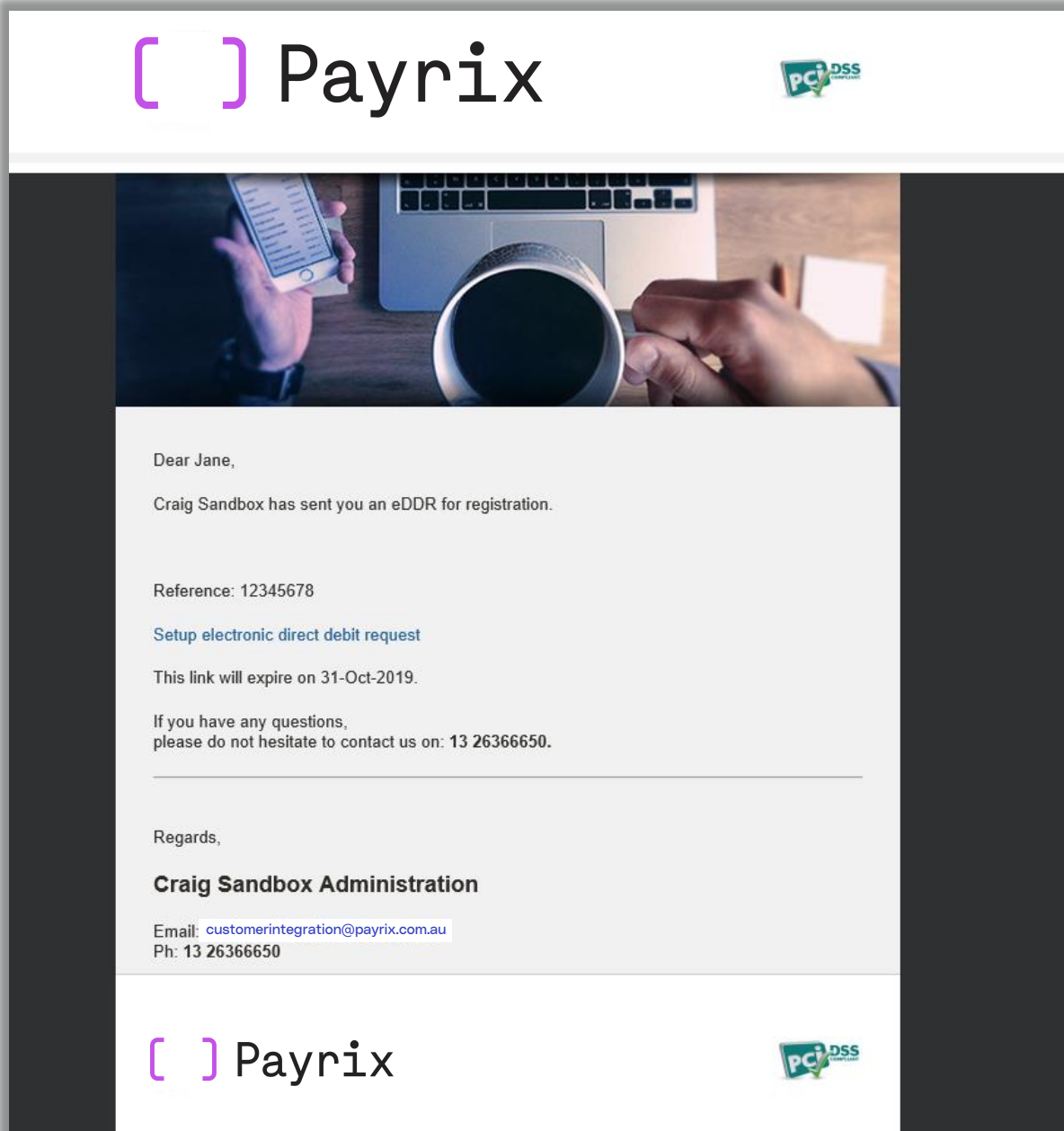


By clicking the PayerID number, you will be taken to the Payer record.

EXAMPLE EMAIL & SUPPORT

EXAMPLE EMAIL

Below is an example email as the payer will receive it.



Customer support

If you require further assistance, please contact Payrix Customer Support:

Australia: 1300 592 283 | admin@payrix.com.au

New Zealand: 0800 480 054 | admin@payrix.com.au

USA: 844-517-5981 | admin@payrix.com.au