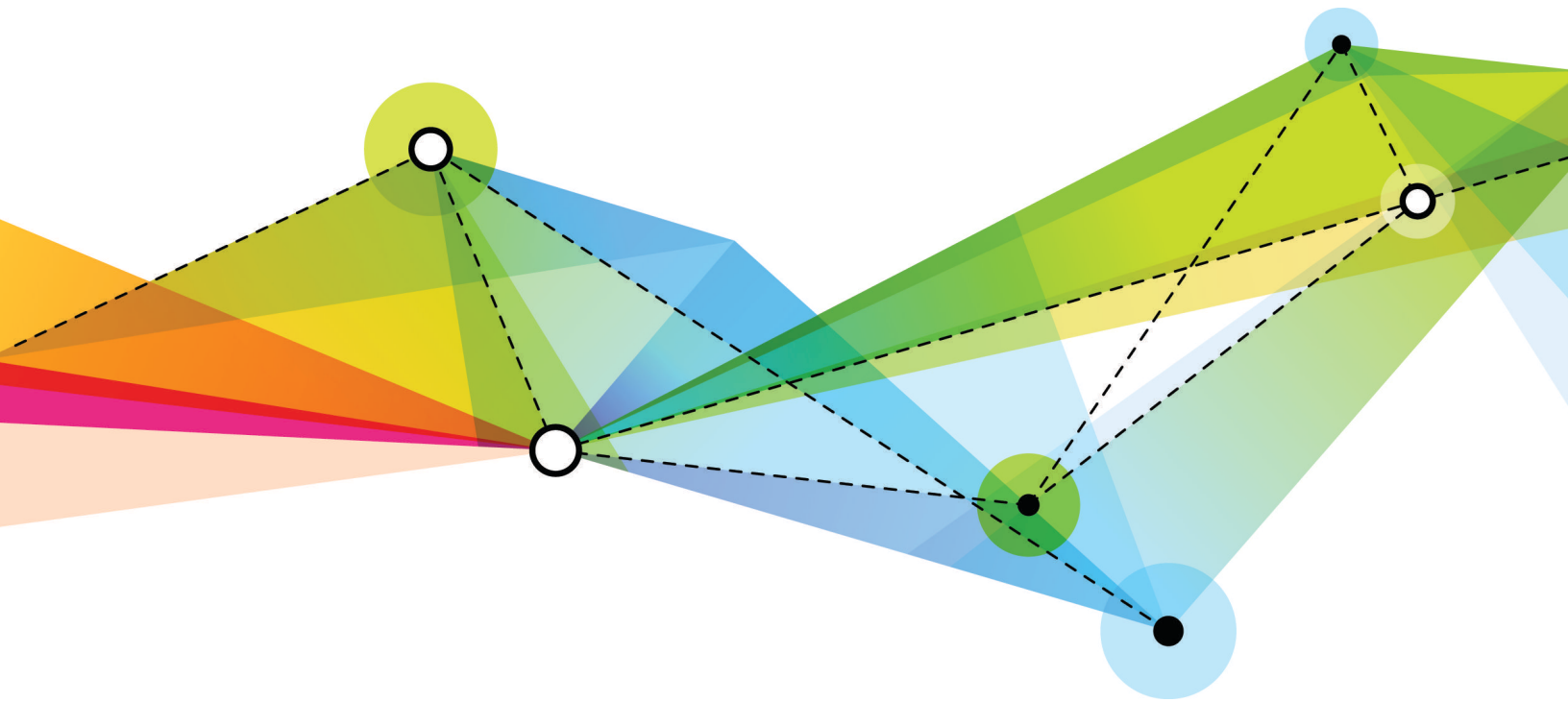




Payment Declined Alert

Quick Reference Guide



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Payment declined alert

Smile can issue an alert when payments are declined.

To create a payment declined alert the following elements must be configured:

- **Email template**—specifies the message to send to the customer
- **Stationery**—defines the stationery document type, which is associated with the email template
- **Packages**—specifies when the alert is sent
- **Account contact email**—specifies the email address the alert is sent to

For more information on configuring individual elements, see the *Configuration Guide*.

Email template

An email template contains the alert message that is sent to the customer.

Email templates are located in **Email Templates** under **Email, SMS, Print & Web** in the main section of the Configuration and Tools page.

This template has a **Document type** of **Payment**.

The screenshot displays the 'Email Template' configuration window. It features two tabs: 'Configuration and Tools' (selected) and 'Email templates'. The 'Document type' is set to 'Payment'. The 'Name' field contains 'Payment: Payment declir'. The 'From' field is 'Example Telecom Accour' and the 'Subject' is 'Example Telecom: Payme'. The 'Reply to' field is empty. The 'Body content type' is set to 'Text'. The 'Body' text area contains the following content:

Dear Customer,

PAYMENT DECLINED ADVICE

Your payment of {amount} has been declined.

Please contact us as soon as possible to arrange payment of your account and avoid suspension of your service.

Should you have any enquiries please contact Accounts.

Yours sincerely,

Example Telecom
Lead by Example!

Phone: 1300 123 123
Fax: 1300 456 456
www.example.com

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Example demonstrates software and services for Inomial's Smile System: Ordering, Provisioning, Authentication, Rating, Billing and Receivables.
Sales & Support: (03) 9663 3554 * support@inomial.com

Figure 1: An example payment declined email template

Stationery

To send the alert email Smile requires a document to be defined. In this case the document will be a placeholder. The document is associated with the email.

Stationery is configured in **Stationery and Forms** under **Email, SMS, Print & Web** in the main section of the Configuration and Tools page.

Create a stationery document with a **Document Type** of **Payment**.



Tip: Create a **Blank address label** and then change the **Document Type**.

On the **Setup** window select the **Email template** you created previously.



Attention: You must publish the stationery document to make it available for use.

The screenshot displays the 'Payment: Payment declined advice' stationery configuration interface. The main window has two tabs: 'Configuration and Tools' and 'Stationery'. Under the 'Stationery' tab, the 'Stationery Name' is 'Payment: Payment declir', and the 'Description' is 'Null document for email dispatch'. The 'Document Type' is set to 'Payment'. There is a checkbox for 'Deprecated' and buttons for 'Save', 'Setup', 'Unpublish', 'Delete', 'Clone', and 'Add Page Group'. An orange modal window titled 'Payment: Payment declined advice' is open, showing detailed configuration options: 'Document Type' is 'Payment', 'Driver' is 'PostScript', 'Page Size' is 'A4', 'Page Orientation' is 'Portrait', 'Email template' is 'Payment: Payment declined advice', there is a checkbox for 'Attach document when emailing this stationery', 'Page group output format' is 'PDF', and 'Attachment filename' is a text field followed by '.PDF'. The modal window has 'Save' and 'Cancel' buttons.

Figure 2: An example payment declined stationery document, including Page Setup configuration

Packages

A dispatch rule must be defined for all relevant accounts. We recommend configuring dispatch rules within the relevant package.

Package dispatch rules are configured in **Packages** under **Services, Ordering & Rating** in the main section of the Configuration and Tools page. **View** the relevant package to access the **Dispatch** tab.

Standard Account

Configuration and Tools Packages

Package Components Dispatch Stationery Order Form Plans

Dispatches

Stationery	Days delay	Dispatch rule	Type	Destination	
Account: Credit Control - Credit Card Expiry Warning	0	Dispatching from account "Dispatch document" action	Email	Account's address	Edit
Invoice	0	Bulk Invoices Only	Email	Account's address	Edit
Payment: Payment declined advice	0	The last time a payment is declined	Email	Account's address	Edit
Reminder (Friendly)	14	Reminder	Email	Account's address	Edit
Reminder (Final)	30	Reminder	Email	Account's address	Edit
Reminder (Disconnect)	60	Reminder	Email	Account's address	Edit

[Add default dispatch](#) [Apply to existing users](#)

Figure 3: An example package Dispatch tab

Package dispatch

Configuration and Tools Packages Standard Account

Stationery Payment: Payment declined advice

Destination type Email

Email address

Initial delay 0 Days

Dispatch rule The last time a payment is declined

☐ Repeatedly send this notice

[Save](#) [Delete](#)

Figure 4: An example payment declined package dispatch configuration page

Account contact email

The alert will only be sent to accounts that have an email address.

If contact details of an account have been completed correctly Smile will send the email alert when the payment gateway advises of a relevant decline.

Sample, Alfred Sample Alfred 2142420658 Settled		Service (Username)	Account #2142420658 Sample, Alfred
AUD \$1,373.34 Current \$0.00 30 days \$108.90 60 days \$1,100.00 90+ days \$164.44		Alternate Account Number	Change
★ this is a note		Smile User ID	25
▼ Account		BPay/Account ID	2142420658
Contact Details		Account type	Standard Account ▾
Payment Settings		E-mail address	<input type="text" value="alfred@example.com"/>
Scheduled Payments		Company name	<input type="text" value="Sample, Alfred"/>
		User 'lastname, firstname' for individuals	
		Company trading name	<input type="text"/>
		ABN	<input type="text"/>

Figure 5: An example Contact settings tab on an account

Testing alerts

When testing the introduction of an alert it is helpful to understand the following actions available to payments.



Tip: Using a payment method with a payment gateway with an offline processing mode makes it easy to test - in a test environment. When implementing in production it may be more practical to use the production payment gateway using test card accounts.

Cancel payment

Before a payment has been included in a batch it can be cancelled from an **Account**.

On the Account Menu Tree, click the ► to the left of **Account**, then click **Scheduled Payments**. Select **Cancel** against the payment awaiting batch. No alerts will be triggered.

Once a payment has been included in a batch this option is not available on an account.

Scheduled Payments			
Payment number	Amount	Status	Attempt count
45082328	\$160.59	Awaiting batch	0
View Allocation Cancel			

Figure 6: An example pending payment on an account

Manually decline

Prior to creating a batch you can **Manually Decline** pending payments. This action simulates repetitive rejections by the payment gateway until the attempt limit is reached. All defined alerts will be triggered.

Pending payments are listed on **View payments ready for processing**.

To access click the **Smile** menu, then click **Billing**. On the Billing page, click **Payments**, then click **View payments ready for processing**.

Click **Manually Decline** against the relevant payment.

Payments ready for batching							
Billing		Payments					
Name (Acc #)	Payment number	Payment type	Acc/Card Number hint	Amount	Attempts / Max	Status	
Sample, Alfred (21424244248)	45077575	Visa	4000 00	\$150.00	0 / 3	Pending Next batch	Account View Manually Decline
Page 1 of 2							
Clear Declined Clear Cancelled							

Figure 7: An example pending payment awaiting batch

Decline

A payment that has been included in a batch can be declined. This simulates a rejection by the payment gateway. The relevant alert, if defined, will be triggered.

To access click the **Smile** menu, then click **Billing**. On the Billing page, click **Payments**, then click **View incomplete batches**. Click **View** to see the details of the batch.

Click **Decline** against the relevant payment.

Entries					
	Name	Account	Payment #	Amount	Status
<input checked="" type="checkbox"/>	Sample, Alfred	2142420658	21429667	-100.00	Processing
				-100.00	

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Figure 8: An example batched payment