

Qualpay Checkout Configuration

Last Modified on 08/15/2024 6:27 pm PDT

To access your permanent Qualpay Checkout settings, go to **Administration**, click **Settings**, and then click the **Checkout** tab.

Set Preferences

As you configure your preferences on the left side of the screen, a preview of what your customer will see is on the right side of the screen. Remember to click the **Save Changes** button, as changes in the preview pane are not automatically saved.

Field	Description
Expire link in X Days/minutes	The length of time that you would like your Qualpay Checkout link to remain valid.
Success URL	The URL you would like your customer directed to after a successful transaction. If you leave this blank, your customer will see the default Qualpay receipt page.
Failure URL	The URL you would like your customer directed to after a failed transaction. If you leave this blank, your customer will see the default Qualpay receipt page.
Default Request Type	Authorization Only or Sale. If you select Authorization, you must capture this transaction type via the Qualpay Payment Gateway API or Qualpay Manager. For ACH Payments, a <i>Sale</i> must be selected. If you select <i>Authorization Only</i> , ACH Payments will be disabled.
Captcha	The CAPTCHA options are <i>none</i> , <i>present if suspicious</i> , and <i>present always</i> . The default setting is <i>present if suspicious</i> . If you wish to use the <i>none</i> option with the permanent link, please contact Qualpay Support. The <i>none</i> option will only be available for permanent links after the Qualpay Risk Team reviews your account.

Customize Page Introduction

Field	Description
Logo	Add your logo in .png format.
Headline	Add a headline to display at the top of your checkout page or modal window.
Introduction	Add an introduction to display below your headline on your checkout page or modal window.

Configure Amount & Frequency

Note that any configuration made here is overridden when a different variable is provided in the Qualpay Checkout API when invoking Qualpay Checkout.

Field	Description
Frequency Label	Add a frequency label to display at the top of your frequency selection buttons.
Frequency Description	Add a frequency description (displayed below the frequency label) on your checkout page or modal window.
Frequency	Select one or more of the following frequencies: <i>once, weekly, bi-weekly, monthly, quarterly, bi-annually, annually, or daily</i> . If you select a frequency, be sure to set the Name or Company/Firm Name as required in the personal information section.
Frequency Duration	Select a frequency duration: <i>Bill until canceled</i> or <i>Bill for a fixed period</i> .
Display Amount at Bottom	Customize whether you want the amount to appear at the top or the bottom of the checkout page.
Amount Label	Add an amount label above the amount displayed on the checkout page or modal window.
Amount Description	Add an amount description below the amount label on the checkout page or modal window.
Amount Type	<p>Select <i>Single Amount</i> if you are charging a fixed amount.</p> <p>Select <i>Multiple Amounts</i> if you provide a list of preset amounts from which your customers can choose. Enter the amounts and click Add Amount.</p> <p>Select <i>Allow customer to enter amount at checkout</i> if you want your customer to enter an amount to be charged at checkout.</p>
Amount	<p>If you selected the <i>Single Amount</i> option, this is the fixed amount you will charge your customer.</p> <p>If you selected the <i>Multiple Amount</i> option, add your amount choices here. If you enter at least one amount, an additional toggle to include an <i>Other Amount Option</i> will become available.</p>
Purchase ID Label	You can choose to label the Purchase ID field with something that makes sense in your workflow, such as Invoice or Account Number.
Purchase ID	Select whether or not you would like to use the purchase ID and if you would like to make it required. We suggest that you use this field to aid in reconciliation, as this value will be included in Qualpay reports. The max value for purchase ID is 25.

Customize Personal Information

Field	Description
Header	Add a header to display at the top of your personal information section on your checkout page or modal window.
Description	Add a personal information description to display below your personal information header on your checkout page or modal window.
Name (First, Last)	<p>If set to Yes, these fields will be displayed on the checkout page or in the modal window. Set Name to <i>required</i> if you do not want to accept an order without this information.</p> <p><i>Note that you must make Name or Company/Firm Name required to use any of the billing frequency options.</i></p>
Company/Firm Name	<p>If set to Yes, these fields will be displayed on the checkout page or in the modal window.</p> <p><i>Note that you must make Name or Company/Firm Name required to use any of the billing frequency options.</i></p>
Full Address	If set to Yes , these fields will be displayed on the checkout page or in the modal window. Set Full Address to <i>required</i> if you do not want to accept an order without this information. Only Full Address or Postal Code may be enabled, but not both.
Postal Code	If set to Yes , this field will be displayed on the checkout page or modal window. Set Postal Code to <i>required</i> if you do not want to accept an order without this information. Only Full Address or Postal Code may be enabled, but not both.
Phone Number	If set to Yes , this field will be displayed on the checkout page or in the modal window. Set Phone Number to <i>required</i> if you do not want to accept an order without this information.
Email	<p>If set to Yes, this field will be displayed on the checkout page or in the modal window. Set Email to <i>required</i> if you do not want to accept an order without this information.</p> <p>If you choose to Email a receipt to your customer in the Receipts section of the Notifications page, you must make this field required.</p>

Add Optional Fields

Field	Description
Label	Add a header to display at the top of your optional fields section on your checkout page or modal window.
Description	Add a personal information description to display (below the optional field label) on your checkout page or modal window.
Field Type	Select how you would like your customer to enter the optional fields: <i>radio</i> (single-select), <i>checkbox</i> (multi-select), or <i>text input</i> .
Field Type Options	Add labels for your optional field checkbox and radio buttons.

Configure Payment Settings

Field	Description
Header	Add a header to display at the top of your payment fields section on your checkout page or modal window.
Introduction	Add an introduction description to display below your payment fields header on your checkout page or modal window.
Allow Digital Wallets	Set to <i>Yes</i> if you want to accept a digital wallet, such as Google Pay.
Allow ACH Payment	Set to <i>Yes</i> if you want to accept ACH payments. If you do not see this option, please contact Qualpay support to enable your account for ACH payments.
ACH Payment Label	If Allow ACH Payment is set to <i>Yes</i> , you can choose between ACH, eCheck, and Bank Account as the label for ACH Payments. Note that this setting will only change what your customer sees. All references to ACH Payments in Qualpay Manager will be "ACH Payments".
Display Security Code (CVV)	Set to <i>Yes</i> if you would like to collect the security code (CVV) from your customer (recommended).

Field	Description
Show "Save Card" Option	<p>If you send a customer_id when invoking Qualpay Checkout, your customer can select to save their payment information if this option is set to Yes. When your customer selects to save during checkout, a Customer Vault entry will be created.</p> <p><i>Note: This feature is not available if you are using the permanent link method.</i></p>
Transaction Fee Type	<p>Set to <i>None</i> you do not want the checkout page to include a Transaction Fee.</p> <p>For a Dynamic Checkout page, select Payment Profile Fee to use fees. Then, include a Payment Profile ID when you generate a Dynamic Checkout link. The link will include the Transaction Fee that was configured on the Payment Profile.</p> <p>For a Permanent Checkout page, select a Payment Profile with Transaction Fees set when creating the Checkout Profile. Then, select the fee and configure the amount (or percent) to charge on your checkout page.</p> <p>If you do not see this option, contact Qualpay support to enable surcharge or convenience fees on your account. To preview, you must enter a card type (credit) and billing state where the fee is allowed.</p>
Payment Button Text	Enter the text you would like on your submit button, such as "donate now" or "buy now".