

Recurring Payments User Guide

Introduction

The ability to schedule recurring payments, similar to a standing order, to another Bristol Pound member has been added to the Bristol Pound account functionality. This User Guide shows how to set up and manage regular payments.

Setting up a Recurring Payment

1. Login to your Bristol Pound account and go to the Banking screen.
2. Select 'Member Payment' from the menu on the right hand side.
3. Select the Business Member, Contact or type the Login name of the member who you want to pay
4. In the Scheduling drop field select 'Recurring payments'. The screen then presents the options shown below.

Member Payment ?

From account	Member Account - Balance: 164.34
To	Business Member
Business Member *	Aardvark Arts & Crafts Ltd ✕
Amount *	<input type="text" value="12"/> . <input type="text" value="99"/> £B
Scheduling	Recurring payments ▼
First occurrence	<input checked="" type="radio"/> Now <input type="radio"/> Future date
Process until	<input checked="" type="radio"/> Being manually canceled <input type="radio"/> A fixed number of occurrences
Process every *	<input type="text" value="1"/> Months ▼
Description	<div style="border: 1px solid #ccc; height: 80px;"></div>

[Submit](#)

5. Complete the following fields:

Amount: This is the regular amount you wish to pay to the Member


First occurrence: Date you wish the first payment to be made. The default is the current date

Process until: This is the number of regular payments you wish to make to the Member, if you select “Being manually canceled” they will go on indefinitely.

Process every: Select how regularly you would like the payments to be made, monthly, weekly or daily.

Description: Notes you wish to go on the transactions

6. Click Submit, you will be presented with a confirmation screen

 Please, review the payment below and click the confirm button


Member Payment > Payment review

Payment review

From account	Member Account
To	Aardvark Arts & Crafts Ltd
Payment type	Online Payment from Individual Account
Amount	12.99
First occurrence	Now
Process until	Being manually canceled
Process every	1 month

[Confirm](#)

7. Check the details and if correct click ‘Confirm. This sets up the recurring payments. If the date of the first payment is the current date this payment will be made immediately. The full schedule is then displayed, an example of which is displayed below.

 The payment was successful [Close](#)

[Member Payment](#) > Recurring payment details

Recurring payment details ?

Status	Open
Amount	12.99
Process until	Being manually canceled
Process every	1 month
Next occurrence	05-09-2016
Submission date	05-08-2016 15:44
From	Graham Woodruff
To	Aardvark Arts & Crafts Ltd
Payment type	Online Payment from Individual Account
Channel	Main web
Transfer number	BP00156286

[New payment](#)

[Add receiver to contacts](#)

[Cancel](#)

[Print](#)

Occurrences

Number	Due date	Status	Amount	Actions
1	05-08-2016	Processed	12.99	View transfer

Viewing Recurring Payments

1. Select *Recurring Payments* from the *Banking* menu. This will present a searchable list of all your recurring payments.

Recurring payments ?


Status Active Inactive

Direction All Credits Debits

Period Not used (select to use)

User Not used (select to use)

[Search](#)



Date	From / to	Description	Amount
05-08-2016	Aardvark Arts & Crafts Ltd	Online Payment from Individual Account	-12.99
02-08-2016	Martin Rüegg	Online Payment from Individual Account	-10.00

Results 1 - 2 of 2 Results per page

2. Clicking on each payment will present the detailed screen

Recurring payments > Recurring payment details

Recurring payment details ?

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Process until	Being manually canceled
Process every	1 month
Next occurrence	05-09-2016
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[Cancel](#)
[Print](#)

Occurrences

Number	Due date	Status	Amount	Actions
1	05-08-2016	Processed	12.99	View transfer

- Each individual payment has its own detail screen accessed by clicking

Recurring payments
Recurring payment details
Transfer details

Transfer details ?

Amount	12.99
Date	05-08-2016 15:44
From	Graham Woodruff
To	Aardvark Arts & Crafts Ltd
Payment type	Online Payment from Individual Account
Transfer number	BP00156287

Cancelling Payments

All future recurring payments to a Member can be cancelled by clicking the Cancel button on the recurring payment details screen. You will be asked to confirm that you want to cancel the payment as shown below.

Recurring payments
Recurring payment details

Recurring payment details ?

Status	Open
Amount	12.99
Process until	Being manually canceled
Process every	1 month
Next occurs	
Submission	
From	
To	
Payment type	
Channel	Main web
Transfer number	BP00156286

Occurrences

Number	Due date	Status	Amount	Actions
1	05-08-2016	Processed	12.99	View transfer