

REFERENCE GUIDE

Payments

Collecting payments from start to finish

Customer	Provider	Source	Date	Amount	Status
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Touring Payments and Test Mode

What It Is

Each payment page opens by search: Products, Payment Integrations, Transactions, Orders, Subscriptions, Payment Links, Coupons, Taxes. A Test and Live switch keeps practice and real money apart.

How It Works For Your Business

- Search for any payment page by name, like Products or Transactions.
- Products is your catalog, and Payment Integrations is where you connect a payment provider.
- Transactions, Orders, and Subscriptions are the records of what came in.
- Payment Links, Coupons, and Taxes are the selling tools. Payment settings hold receipts and retry rules.
- Look for the Test and Live switch. Test charges nothing real, and Live uses real cards.

Touring Payments and Test Mode – Tips & Guidelines

Tips

- Check the mode before you start any payment task.
- Test and Live are kept separate, so data in one may not show in the other.
- A new account shows no provider connected, and that is normal.
- Page names can look a little different, so search for the closest name.

DO

- Check Test or Live first
- Open every page once
- Build and test in Test mode
- Flip to Live before customers pay

DON'T

- Test with real customers
- Panic when data looks missing
- Skip the mode switch
- Memorize every page at once

Connecting Stripe and Payment Methods

What It Is

Stripe is the payment provider that moves the money. You connect it once from Payment Integrations, confirm it says Connected, then use Manage to choose which payment methods customers can use.

How It Works For Your Business

- Search for Payment Integrations and click Connect on the Stripe card.
- Log in or create a Stripe account, then approve the connection on Stripe's own site.
- Return to Payment Integrations and look for Connected on the Stripe card. Refresh if needed.
- Click Manage to turn cards, wallets, and bank options on or off.
- One Stripe account connects to one account in your software.

Connecting Stripe and Payment Methods – Tips & Guidelines

Tips

- Connect the Stripe account that belongs to this business.
- If the Connect button is missing, check your permission to connect integrations.
- Methods shown depend on your Stripe account, country, and where they are used.
- Recurring payments may need a method on in your software and in Stripe.

DO

- Have your Stripe login ready
- Confirm the Connected status
- Keep defaults when unsure
- Add methods when you have a reason

DON'T

- Share Stripe login details
- Connect the wrong account
- Turn on methods you cannot receive
- Skip checking the status

Products and One-Time Prices

What It Is

A product is an item you build once and reuse in payment links, funnels, invoices, and forms. A one-time price means the customer pays once and is done.

How It Works For Your Business

- Search for Products and click Create Product.
- Fill in Title, Description, and a Media image. Customers see these at checkout.
- Look for Include in Online Store, Product Label, and Product Collection. All are optional.
- Set the pricing type to One-Time, add a Pricing Name, an Amount, and a Currency, then Save.
- Use the row's three-dot Actions menu and choose Duplicate to copy a product.

Products and One-Time Prices – Tips & Guidelines

Tips

- Write the title so a stranger knows what they are buying.
- Leave Track Inventory off for services and downloads.
- Add another price to the same product instead of building a new one.
- Compare-at Price is optional and shows the original price for savings.

DO

- Use a clear customer title
- Upload a square image
- Duplicate similar products
- Add prices to one product

DON'T

- Use inside nicknames
- Turn on Track Inventory by habit
- Rebuild products from scratch
- Rush the Online Store toggle

Recurring Prices and Trials

What It Is

A recurring price charges again and again on a schedule. You set the amount, the billing period, and an optional trial counted in days, so billing runs without you.

How It Works For Your Business

- Open a product, add a price, and change the Pricing Type to Recurring.
- Enter a Pricing Name and the Amount charged each time.
- Choose the billing period, such as weekly, monthly, or yearly.
- Leave Number of Payments blank to keep billing, or type a number for a payment plan.
- Use the trial field in days and the optional Setup Fee, then Save.

Recurring Prices and Trials – Tips & Guidelines

Tips

- A trial only works on recurring prices, never on one-time prices.
- Buyers appear in Subscriptions only after a purchase.
- Confirm trial and billing behavior with a Test mode purchase.
- Field names can differ slightly, so look for the closest match.

DO

- Name the price clearly
- Set the billing period on purpose
- Test the trial in Test mode
- Leave blank limits on purpose

DON'T

- Add a trial to a one-time price
- Forget the billing period
- Add a setup fee by accident
- Expect Subscriptions to fill before a sale

Creating and Sharing Payment Links

What It Is

A payment link is one web address that sends a customer straight to a checkout page built from your product and price. You can text it, email it, or post it.

How It Works For Your Business

- Search for Payment Links and click Create Link. A product must exist first.
- Name the link, choose a Product, then choose the Price it should use.
- Leave optional settings alone at first, then click Save.
- Click Preview to see the hosted checkout, then copy the address from your browser bar.
- In Test mode, run a pretend purchase and look for it in Transactions.

Creating and Sharing Payment Links – Tips & Guidelines

Tips

- Your product title and image show on the checkout automatically.
- If a test does not show, check the mode and that Stripe says Connected.
- Details can be added to the end of the link to pre-fill name, email, or phone.
- Manual payment methods outside your provider may not work on payment links.

DO

- Build the product first
- Preview before sharing
- Test in Test mode
- Keep the link somewhere handy

DON'T

- Share before testing
- Forget to switch to Live
- Skip the Transactions check
- Guess which price the link uses

Taxes and Tax Codes

What It Is

Taxes holds your tax rates, which you can attach to products. Tax settings on a product can also use a Product Tax Code and decide whether prices include tax.

How It Works For Your Business

- Search for Taxes and use Add Tax to enter a name, a rate, and a description or tax ID.
- Attach a saved tax rate to a product so it applies when that product is sold.
- On a product, look for the Tax section and the Product Tax Code option for automatic tax.
- Choose whether to include tax in prices. Inclusive means tax is inside the price; exclusive adds it on top.
- Test a checkout to see how tax appears before you go Live.

Taxes and Tax Codes – Tips & Guidelines

Tips

- Name each tax so you can tell them apart later.
- Pick inclusive or exclusive on purpose, since customers see the difference.
- Tax options can vary by account, plan, and region, so use what you see.
- Ask your tax professional which rates and codes apply to you.

DO

- Name each tax clearly
- Attach tax to the right products
- Decide inclusive or exclusive
- Test a checkout

DON'T

- Guess your tax rate
- Attach tax to everything blindly
- Switch settings after launch without a test
- Skip the tax ID field if you need it

Coupons and Order Forms

What It Is

Coupons are discount codes you create in Coupons (search for it). An order form puts a product on a funnel page so customers can buy right there.

How It Works For Your Business

- Search for Coupons and click Create Coupon. Add a name and a code.
- Choose Percentage or Fixed Amount and set optional start and end dates.
- Set usage limits, such as total redemptions, specific products, or one per customer.
- For subscriptions, choose how long a discount lasts: forever or a number of months.
- For an order form, add the product in the funnel's Products tab, then add a One-Step or Two-Step Order Form element on the page.

Coupons and Order Forms – Tips & Guidelines

Tips

- Enter your coupon code on a payment link checkout to test it.
- Limit a code to specific products so it cannot be used everywhere.
- Save and publish the funnel page, then run a test checkout.
- Order form settings can vary by account, so check each option on screen.

DO

- Use short, clear codes
- Set start and end dates
- Limit codes to the right products
- Publish and test the order form

DON'T

- Skip usage limits
- Leave a code live forever by mistake
- Forget to publish the page
- Test only in Live mode

Transactions, Orders, and Subscriptions

What It Is

Transactions show each payment, Orders show what was bought, and Subscriptions track repeat billing. From Subscriptions you can pause, update, cancel, and retry failed payments.

How It Works For Your Business

- Transactions lists each payment with status and source. Filter by date and status, then Export CSV.
- Orders shows order details, items, and fulfillment, and can also export to CSV.
- An order relates to the transaction that paid for it.
- Subscriptions shows provider, customer, source, amount, and status, such as Trial, Active, Canceled, Suspended, or Failed.
- Open a subscription to update products or dates, pause and resume, cancel, or manually retry a failed payment.

Transactions, Orders, and Subscriptions – Tips & Guidelines

Tips

- Search for Subscription Settings to review Failed Payment Retries.
- Use Transactions to confirm a test purchase worked.
- Check Subscriptions often to see who is active, trialing, or has a failed payment.
- Pausing is different from canceling, so pick the right action.

DO

- Filter before you export
- Check failed payments
- Review retry settings
- Use pause when it fits

DON'T

- Cancel when you mean pause
- Ignore Failed statuses
- Mix up orders and transactions
- Export without filtering

Refunds, Text-to-Pay, Receipts, Permissions

What It Is

These tools handle money after and around a sale. You can refund a payment, send a payment request by text, send receipts automatically, take card taps on your phone, and control who sees payments.

How It Works For Your Business

- For a refund, open Transactions, click the three dots, and choose Refund. The full amount is pre-filled, so edit it for a partial refund.
- Add an internal note and confirm. In Conversations, use the payment request icon in a text thread to pick a product, due date, and Test or Live.
- Search for Receipts, turn on automatic receipts, and set a title, number prefix, and email template.
- Tap to Pay uses the mobile app's Point of Sale and Charge screens. It needs Stripe and an NFC device.
- Search for Users, open a user, and set their Payments permissions.

Refunds, Text-to-Pay, Receipts, Permissions – Tips & Guidelines

Tips

- Add an internal note to every refund so your team knows why.
- Test a payment request in Test mode before sending a real one.
- Give each person only the Payments permissions they need.
- Tap to Pay needs an NFC-capable device and Stripe, so check before you plan around it.

DO

- Add a refund note
- Test a payment request
- Turn on automatic receipts
- Limit team permissions

DON'T

- Refund without checking the amount
- Send requests in the wrong mode
- Give everyone full access
- Skip the receipt preview

Key Terms Glossary

Payment provider

The company that moves the money, like Stripe or PayPal.

Test mode

Practice mode where nothing real is charged.

Live mode

Real cards and real money.

Product

A reusable item with a title, description, and prices.

One-Time price

A price the customer pays once.

Recurring price

A price that charges again on a schedule.

Trial period

Free days, counted in days, before the first charge.

Payment link

One web address that goes straight to checkout.

Transaction

One payment that came in, shown as a row.

Subscription

A purchase that bills again and again.

Inclusive tax

Tax is already inside the displayed price.

Coupon

A discount code with a name, code, and limits.

Getting Help

Your software changes over time, so a button, tab, or setting may look a little different from what you see here. If something does not match, check the in-app help for Payments or look for the option with the closest name.