



Payrolls Direct

Payroll & HR Management

Collecting Payments by Direct Debit - GoCardless

**STORE THIS MANUAL IN A SECURE LOCATION
ONLY FOR USE BY LICENSEE OWNER NOT STAFF**

CONFIDENTIAL INFORMATION

Using GoCardless Manual

Using GoCardless to Collect Payments by Direct Debit



1) First create payment plan by clicking on calendar icon - then click on **Create Plan**

a) In **Name**, input exactly what the plan is for, and which business it is for. Example:

ABC Ltd - 7 – 8 employees - £79.00 – monthly fee

b) Select **GPB** as **Currency**

c) In **Amount**, input the fee agreed. Example: **£79**

d) In **Recurring**, use the drop down box, to select Monthly or Weekly - select **Monthly**

e) In **Take Payment**, choose Take payments on a specific day of the month, and enter day of month to collect payment as agreed with customer. Example:27th

f) In **Continuing**, tick either **Until Further Notice** OR **For a Specific Number of Payments** and select number of payments - example: **12 payments** - Then click on **Create Plan** – See Screenshot below

Create a new plan ×

Name*

Currency* Amount*

GBP (£) 79

Recurring*

Monthly

Take payments as soon as possible

Take payments on a specific day of the month

27th of the month

Continuing

For a specific number of payments

12 payments

2) Add customer, link to payment plan and ask for authorisation.

After you have created a plan, click on Customers , and click on **Add Customers** 

a) Click on **Email**

 **Email**

b) **Last Name**

Insert Last Name of Customer Contact – Example:

Austin

c) In **Customer Emails**

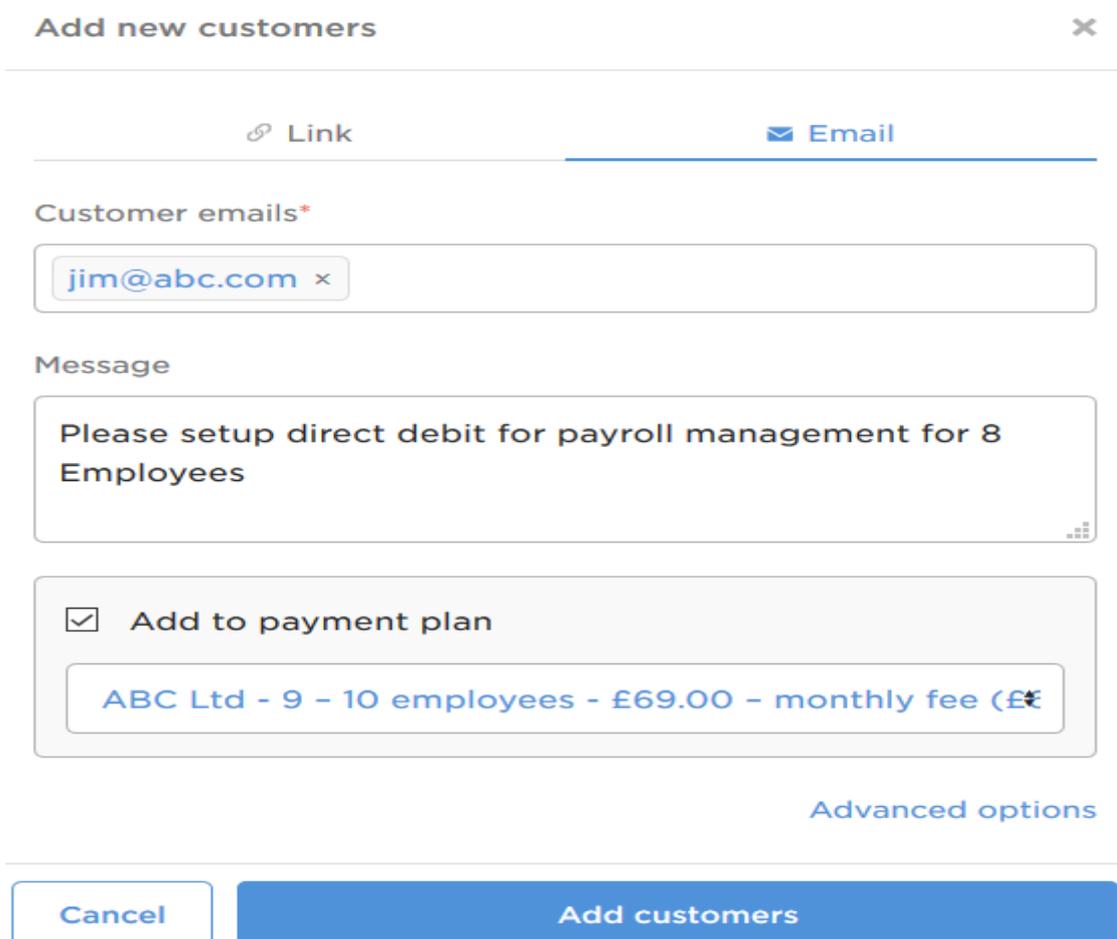
In Email, insert email address where you want to send direct debit instructions. Example:

jim@abc.com

d) In **Message** enter: **Please setup direct debit for payroll management for 8 Employees**

f) Put a tick in **Add to payment plan**, select payment plane you have just created & click on **Add Customer**

See Screenshot below:



The screenshot shows a web form titled "Add new customers" with a close button (X) in the top right corner. The form has two tabs: "Link" and "Email", with "Email" being the active tab. Below the tabs, there is a section for "Customer emails*" containing a text input field with the value "jim@abc.com" and a close button (X). Below this is a "Message" section with a text area containing the text "Please setup direct debit for payroll management for 8 Employees". At the bottom of the form, there is a checkbox labeled "Add to payment plan" which is checked. Below the checkbox is a text input field containing the text "ABC Ltd - 9 - 10 employees - £69.00 - monthly fee (£)". At the bottom right of the form, there is a link for "Advanced options". At the very bottom of the form, there are two buttons: "Cancel" and "Add customers".

The customer then will get simple email instructions asking them to click on the link, go to secure site, and enter their bank details.

Once the customer has submitted their bank details, the Direct Debit is now setup and complete.

The Video Guides to GoCardless are here: <https://gocardless.com/how-to#overview-of-dashboard>