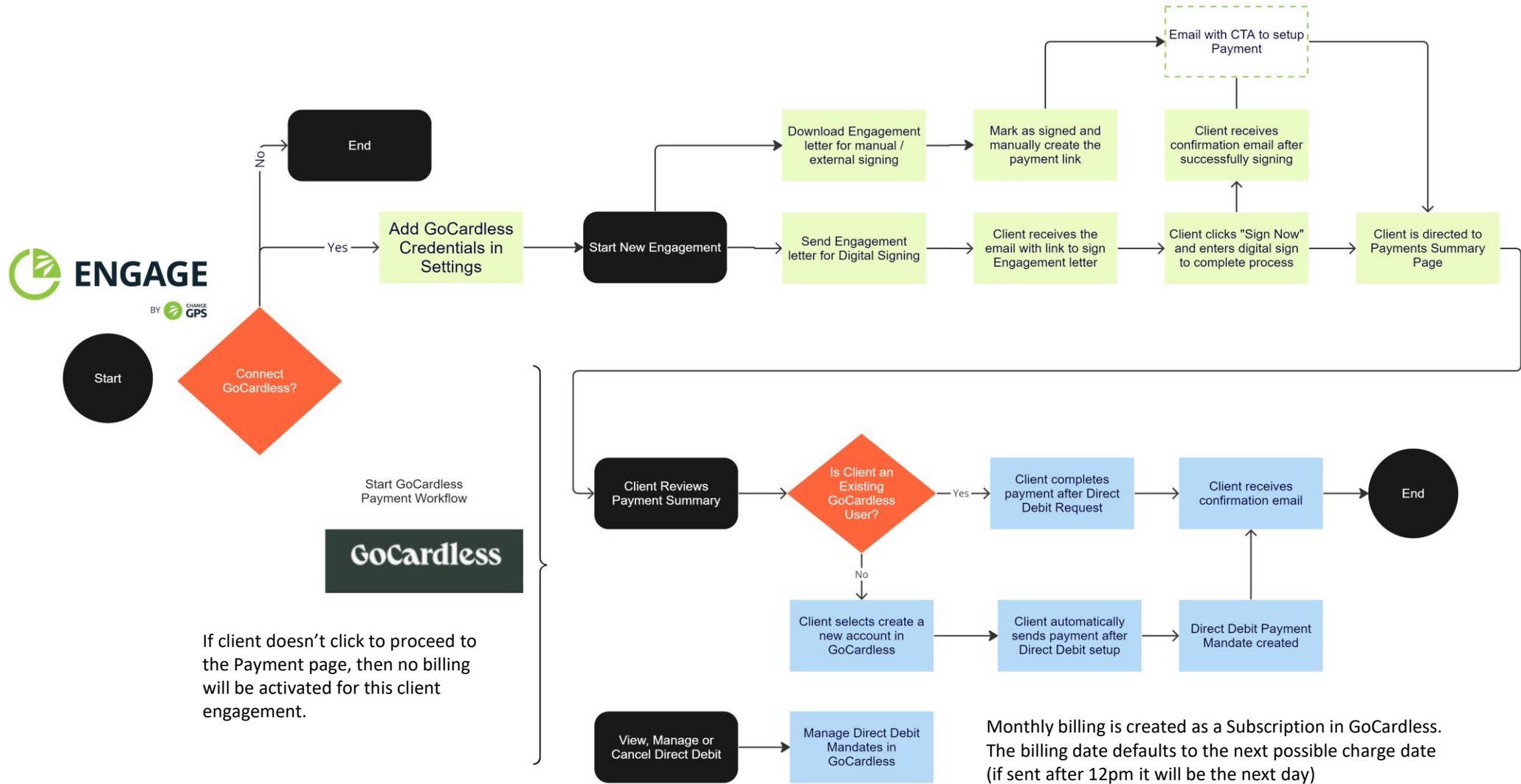


# GoCardless Direct Debit Payment integration with Engage



Use the ChangeGPS Engage to create a new Engagement letter and add your services & fees  
On 5. Produce tab select to download to send your letter manually OR send using the internal digital signing  
Be sure to setup your GoCardless API for an integrated client payment workflow\*

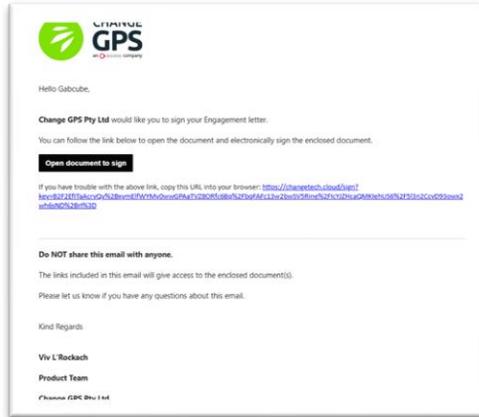
The screenshot shows the Engage software interface. At the top, there's a navigation bar with the Engage logo and the text 'Home / Engage / New Engagement'. Below this is a progress bar with five steps: 1. Engage Info, 2. Client Details, 3. Preview, 4. Collate, and 5. Produce. A 'Previous' button is located to the right of the progress bar. Below the progress bar, there's a 'Save For Later' section with a 'SAVE WIZARD' button. Underneath, there's a 'File Name:' field containing '2024-07-31 - Engage - Gabcube Trust.pdf'. At the bottom of the interface, there are two main options: 'Send for Signing' with a 'SEND PDF' button, and 'Manual Sending' with a 'DOWNLOAD PDF' button. A 'Previous' button is also visible at the bottom right. Two blue boxes with arrows are overlaid on the interface. The first box, labeled 'Internal Digital Signing', has an arrow pointing up to the 'SEND PDF' button and another arrow pointing down to a 'Go to Page 2' button. The second box, labeled 'External Signing, Manual Status Update', has an arrow pointing up to the 'DOWNLOAD PDF' button and another arrow pointing down to a 'Go to Page 3' button.

- Integrated payment options are only available after an Engagement status is changed to signed
- Monthly and upfront fees are available for immediate payment, On Completion Fees WILL NOT be included in the GoCardless mandate

# Workflow for Digital Signing and Direct Debit Payments with GoCardless

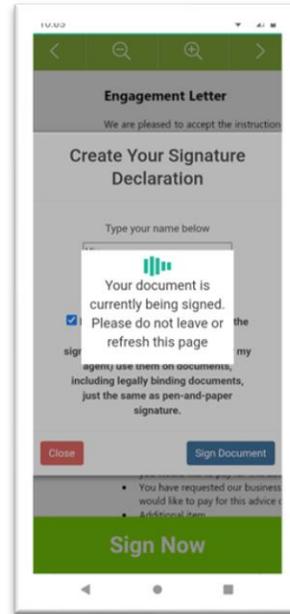
1

Client receives email with Click Here to sign prompt. Email includes the firm's logo



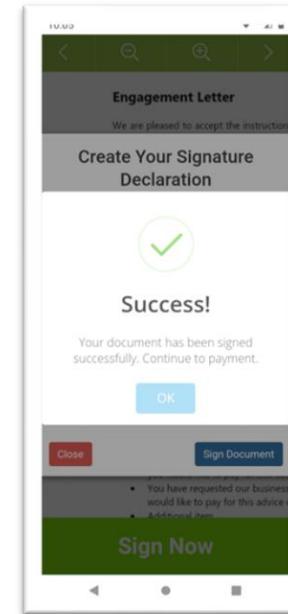
2

Client reviews then digitally signs to accept terms



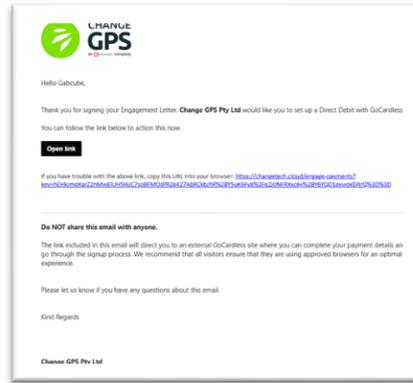
3

Once confirmed client is prompted click OK to continue to payment setup

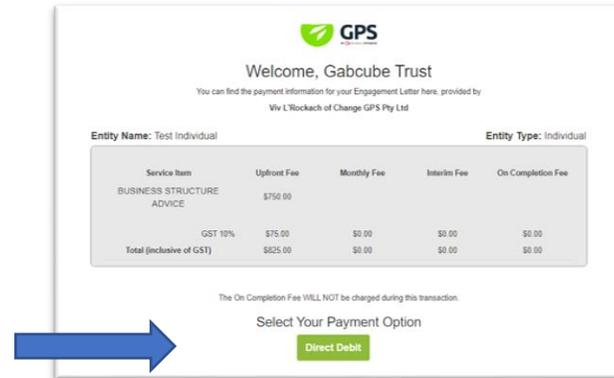


4

Client also receives confirmation email with Click Here to pay now prompt

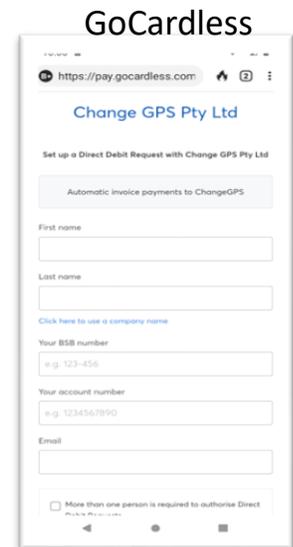


5



6

5. Client select Direct Debit and is re-directed to the GoCardless hosted page where client enters details to setup payment



Direct Debit with GoCardless available for Monthly, Upfront & Interim Fees only  
Monthly Fees create a Subscription in GoCardless. The other payment types are one-off only  
View, Manage and Cancel DD mandates directly in GoCardless

# Workflow for Manual Signing and Direct Debit Payment Process

After downloading letter to send for manual signing (or to use external digital signing method) find entry on Engage dashboard  
Click on Actions button to view options:

711	Viv Rockach	29/06/2021 10:47 am	Bean Roasters Pty Ltd	Fixed Price	\$1,100.00	\$0.00	\$0.00	\$0.00	Awaiting Signature	N/A	Manual Signing	No	Actions
-----	-------------	---------------------	-----------------------	-------------	------------	--------	--------	--------	--------------------	-----	----------------	----	---------

1

Actions:  
Click to confirm signed document received

Letter #711 - Actions

Document

Download → Confirm Signed Document

Upfront Payments

Create Payment Link Confirm Payment Received

Disengage Actions

Success

Your document has been confirmed as Signed

OK

2

Once receipt of signed document is confirmed the Create Payment Link button will be active (\*if GoCardless connected)

Document

Download Unsigned Document Document Has Been Signed

Upfront Payments

Create Payment Link Confirm Payment Received

Disengage Actions

Here's your link. Send it to your client.

https://changetech.cloud/engage-payments?key=Tic4fxc&email=vivrockach@changegps.com

3

Click on Create Payment Link

Copy link and send via email (opens a web page)

Welcome, Realfire Pty Ltd

You can find the payment information for your Engagement Letter here, provided by Viv Rockach of Change GPS Pty Ltd

Service Item	Upfront Fee	Monthly Fee	Interim Fee	On Completion Fee
Cash Flow: Level 1 Advisory	\$500.00			
GST 10%	\$50.00	\$0.00	\$0.00	\$0.00
Total (inclusive of GST)	\$550.00	\$0.00	\$0.00	\$0.00

The On Completion Fee WILL NOT be charged during this transaction.

Select Your Payment Option

Direct Debit

4

Client enters details to setup payment

GoCardless

Change GPS Pty Ltd

Set up a Direct Debit Request with Change GPS Pty Ltd

Automatic invoice payments to ChangeGPS

First name

Last name

Your BSB number

Your account number

Email

Direct Debit with GoCardless available for Monthly, Upfront & Interim Fees only  
Monthly Fees create a Subscription in GoCardless. The other payment types are one-off only  
View, Manage and Cancel DD mandates directly in GoCardless

# Re-sending Payment Requests for Signed Engagements

Engage Dashboard

Home / Engage / Engage Dashboard



**CHANGE  
GPS**  
an access company

Download Report

Send New Engagement

Search By Creator

Search By Client

Letter ID	Created By	Date Created	Client	Type	Upfront Total	Monthly Total	Interim Total	Completion Total	Status	Approval Date	Send Type	ID Cited?	Actions
952	Leo Iermano	12/07/2021 2:32 pm	Realfire Pty Ltd	Fixed Price	\$825.00	\$0.00	\$0.00	\$0.00	Awaiting Signature	N/A	Digital Signing	Yes	Actions

After selecting to send letter for Digital Signing – navigate to Engage Dashboard and click on Actions

Resend Payment Request will re-send the email to prompt user to make payment

Letter #870 - Actions

Document

Resend Signature Request    Download Signed Document

Upfront Payments

Resend Payment Request    Confirm Payment Received

Disengage    Actions    Close

Letter #879 - Actions

Document

Download Unsigned Document    Document Has Been Signed

Upfront Payments

Create Payment Link    Confirm Payment Received

Disengage    Actions    Close

After selecting to send letter for Manual Signing – navigate to Engage Dashboard and click on Actions

Create Payment Link enable you to copy link and send via email to user to make payment

Manage all payouts, refunds and subscription cancellations directly in GoCardless merchant account dashboard.

## GoCardless Customer Hub

The screenshot displays the GoCardless Customer Hub interface. On the left is a dark sidebar with the GoCardless logo and navigation links: Home, Payments, Customers, Success+, Protect+, and Developers. Below these are two buttons: 'Create payment' and 'Invite customers'. The main content area shows the breadcrumb 'Customers / CU0016X5Y9YM27' and search/settings options. The customer name 'Aussie New' is prominently displayed with three action buttons: 'Add to Subscription template', 'Create subscription', and 'Create one-off payment', along with a menu icon. Below this is a 'Details' section with a table of customer information: Status (Active), Created (25 Jun 2024), Email (aus@gc.com), and Address (Australia). A 'JSON' link is also present. The 'Bank Accounts' section shows one account: 'National Australia Bank (AU)' with a masked card number '\*\*\*\*\*78' and a status of 'Enabled', created on 25 Jun 2024. At the bottom, the heading 'Refunds issued against mandates' is visible.

GoCardless

Customers / CU0016X5Y9YM27

Search Settings

**Aussie New**

Add to Subscription template Create subscription Create one-off payment

**Details**

Status	Active	JSON
Created	25 Jun 2024	
Email	aus@gc.com	
Address	Australia	

**Bank Accounts**

National Australia Bank (AU)	Enabled	Created 25 Jun 2024
*****78		

Refunds issued against mandates