

Checkout Configuration

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To access your permanent Checkout settings, go to **Administration**, click **Settings**, 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 Checkout link to remain valid (only on vault checkout profiles).
Success URL	URL you would like your customer directed to after a successful transaction. If you leave this blank, your customer will be presented with the default receipt page.
Failure URL	URL you would like your customer directed to after a failed transaction. If you leave this blank, your customer will be presented with the default receipt page.
Default Request Type	Authorization Only or Sale. If you select Authorization, you will need to capture this transaction type via the Payment Gateway API or Merchant Manager. For ACH Payments, <i>Sale</i> must be selected. If you select <i>Authorization only</i> , ACH Payments will be disabled.
CAPTCHA	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 Customer Support. The <i>none</i> option will only be available for permanent links after your account is reviewed by our risk team.

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 Checkout API when invoking Checkout.

Field	Description
Frequency Label	Add a frequency label at the top of your frequency selection buttons.

Field	Description
Frequency Description	Add a frequency description to display below your 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 require Name or Company/Firm Name 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 would like 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	Select <i>Single Amount</i> if you are charging a fixed amount. Select <i>Multiple Amounts</i> if you provide a list of preset amounts from which your customers choose. Enter the amounts and click <i>Add Amount</i> . Select <i>Allow customer to enter amount at checkout</i> if you want your customer to enter an amount to be charged at checkout.
Amount	If you selected the <i>Single Amount</i> option, this is the fixed amount you will charge your customer. 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.
Purchase ID Label	You can elect to label the Purchase ID field to something that will make sense in your workflow - for example, invoice number or account number.
Purchase ID	Select whether you would like to use the purchase ID or not 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 our reports. The max value for purchase ID is 25.

Customize Personal Information

Field	Description
Header	Add a header to display your personal information section at the top of 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)	These fields will be displayed on the checkout page or modal window if set to <i>Yes</i> . Mark <i>required</i> if you do not want to accept an order without this information. Note that you must make the Name or Company/Firm Name required to use any billing frequency options.

Field	Description
Company/Firm Name	These fields will be displayed on the checkout page or modal window if set to <i>Yes</i> . Note that you must make the Name or Company/Firm Name required to use any billing frequency options.
Full Address	These fields will be displayed on the checkout page or modal window if set to <i>Yes</i> . Mark <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	This field will be displayed on the checkout page or modal window if set to <i>Yes</i> . Mark <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	This field will be displayed on the checkout page or modal window if set to <i>Yes</i> . Mark <i>required</i> if you do not want to accept an order without this information.
Email	This field will be displayed on the checkout page or modal window if set to <i>Yes</i> . Mark <i>required</i> if you do not want to accept an order without this information.

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 your optional field's 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

Setting	Options
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 would like to accept a digital wallet, such as Google Pay.
Allow ACH Payment	Set to <i>Yes</i> if you would like to accept ACH payments. If you do not see this option, please contact our support team to have your account enabled 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 Merchant Manager will be "ACH Payments."

Setting	Options
Display Security Code (CVV)	Set to <i>Yes</i> if you want to collect the security code (CVV) from your customer (recommended).
Show "Save Card" Option	<p>Send a <code>customer_id</code> when invoking Checkout. Your customer can select to save their payment information if this option is set to <i>Yes</i>. A Customer Vault entry will be created when your customer selects to save during checkout.</p> <p>Note that this feature is not available if you use the permanent link method.</p>
Add Fee Recovery	<p>Set to <i>Yes</i> if you would like an amount added to the transaction to cover your processing costs or the costs of accepting a transaction from a non-customary channel such as online.</p> <p>If you do not see this option, contact our support team to enable surcharge or convenience fees on your account. To preview, you must enter a card type (credit) and billing state where surcharging is allowed.</p>
Payment Button Text	Enter the text you would like on your submit button, such as "donate now" or "buy now."