

CITK

Partial Payment: Collect Deposit
Amount



In This Article

What is Partial Payment?

Partial payment offers bookers the opportunity to secure bookings by paying a deposit upfront, with the remaining balance settled at a later time. Alongside collecting full payments, businesses now have the capability to collect deposit amounts from bookers. This feature has been seamlessly implemented across all calendar types and aids in reserving seats.

With this new feature, users have the flexibility to determine either a flat amount or a percentage of the total amount to be charged to the booker at the time of booking.

Impact of Partial Payment on Transactions & Invoices

Tax Counselling

30 Mins

11:30 AM - 12:00 PM , Wed, Apr 3, 2024

Asia/Calcutta (GMT+5:30)

Total Amount

\$ 100

Pay now

\$ 20

Enter Details

First Name *

John

Last Name *

Doe

Phone *

098767 87878

Email *

john.doe@gmail.com

Additional Information

Is there anything you would like us to know before your appointment?

☒ I confirm that I want to receive content from this company using any contact information I provide.

Secure Payment

TEST MODE

Card number

MM / YY CVC

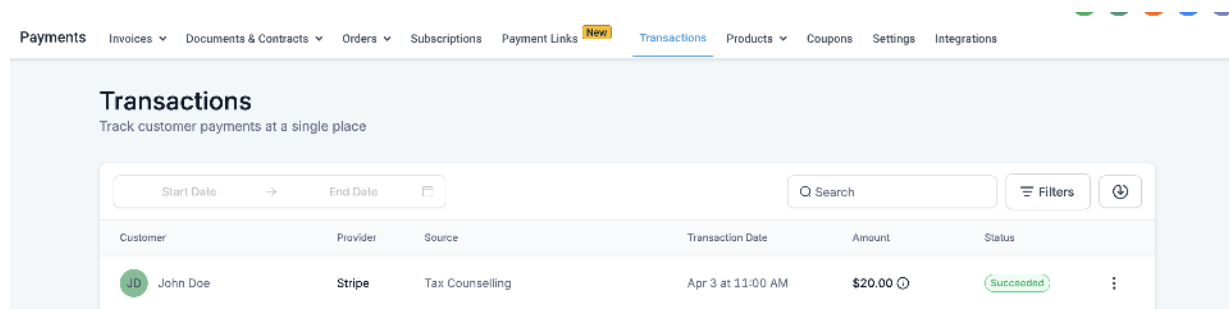
Schedule Meeting

When partial payments are enabled, two entries appear in payments:

Partial Payment: Collect Deposit Amount : CITK

Transaction:

The amount charged during booking (Deposit Amount).

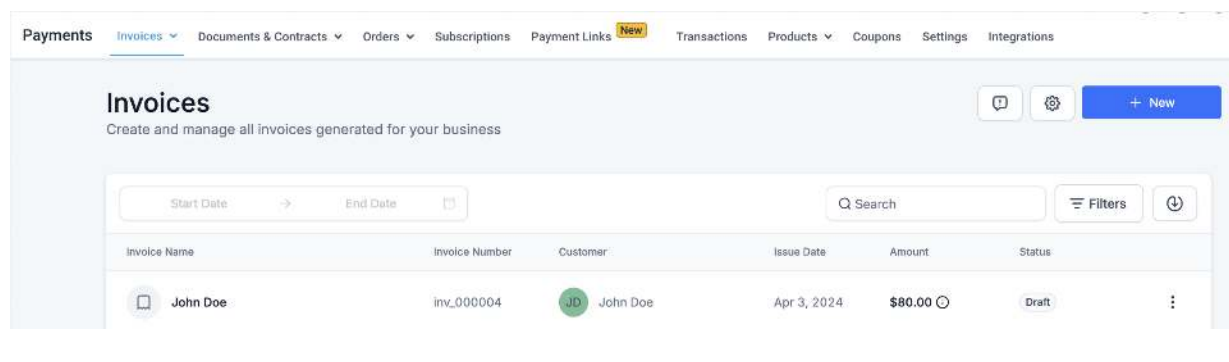


The screenshot shows the 'Transactions' page in the CITK interface. The top navigation bar includes 'Payments', 'Invoices', 'Documents & Contracts', 'Orders', 'Subscriptions', 'Payment Links' (marked 'New'), 'Transactions' (active), 'Products', 'Coupons', 'Settings', and 'Integrations'. The 'Transactions' section has a subtitle 'Track customer payments at a single place'. Below this is a search bar with 'Start Date' and 'End Date' filters, a 'Q Search' input, and 'Filters' and 'Download' buttons. The table below lists transactions with columns: Customer, Provider, Source, Transaction Date, Amount, and Status. A single transaction is shown for John Doe, processed by Stripe, for Tax Counselling, dated Apr 3 at 11:00 AM, for \$20.00, with a status of 'Succeeded'.

Customer	Provider	Source	Transaction Date	Amount	Status
JD John Doe	Stripe	Tax Counselling	Apr 3 at 11:00 AM	\$20.00	Succeeded

Invoices

: The pending amount to be collected from the booker (Total Amount - Deposit Amount). The invoice status remains in draft, and users are required to manually collect the pending amount.



The screenshot shows the 'Invoices' page in the CITK interface. The top navigation bar is the same as the Transactions page. The 'Invoices' section has a subtitle 'Create and manage all invoices generated for your business'. Below this is a search bar with 'Start Date' and 'End Date' filters, a 'Q Search' input, and 'Filters' and 'Download' buttons. The table below lists invoices with columns: Invoice Name, Invoice Number, Customer, Issue Date, Amount, and Status. A single invoice is shown for John Doe, with invoice number inv_000004, issued on Apr 3, 2024, for \$80.00, with a status of 'Draft'.

Invoice Name	Invoice Number	Customer	Issue Date	Amount	Status
John Doe	inv_000004	JD John Doe	Apr 3, 2024	\$80.00	Draft

How to Use Partial Payment?

- 1. Integrate Payment Gateway:** Ensure that you have integrated a payment gateway such as Stripe or Authorize.net. (Payments Module > Integrations)
- 2. Enable Payment:** Enable the "Accept Payments" toggle for the calendar from Calendar Settings > Forms & Payments section.

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Meeting Details

Availability

Forms & Payment

Notifications & Additional Options

Customizations

Quick Tip

You have the option to include custom values and fields of contacts in both the form message and the form URL.

Add Guests

☒ Name and email ☐ Count only

Confirmation page

☒ Default ☐ Redirect URL

Thank you message

Thank you for your appointment request. We will contact you shortly to confirm your request. Please call our office at {{contactMethod}} if you have any questions.

Facebook pixel ID (optional)

Pixel ID

☒ Auto-confirm new calendar meetings

Payment

Configure payments options

☐ Accept payments

3. Enter Total Amount and Currency: Specify the total amount for your service or appointment and select the desired currency.

Payment

Configure payments options

☒ Accept payments

Total Amount

100

USD

☐ Accept partial payment

Description

Enter a description that will be displayed to the user, informing them about the payment

4. Activate Partial Payment Option: Check the "Accept Partial Payment" box.

Partial Payment: Collect Deposit Amount : CITK

Payment

Configure payments options

☒ Accept payments ⓘ

Total Amount

100

USD

☒ Accept partial payment ⓘ

Amount

Percentage

Deposit Amount

0

USD

5. **Select Amount Type:** Choose whether to add a **Flat Amount** or a **percentage**. The percentage is calculated based on the total amount.

Payment

Configure payments options

☒ Accept payments ⓘ

Total Amount

100

USD

☒ Accept partial payment ⓘ

Amount

Percentage

Deposit Amount

0

USD

6. **Enter Deposit Amount / Percentage:** Specify the deposit amount / deposit percentage for your service or appointment. The percentage is calculated based on the total amount entered.

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Payment

Configure payments options

☒ Accept payments ⓘ

Total Amount

100

USD

☒ Accept partial payment ⓘ

Amount

Percentage

Deposit Amount

20

USD

7. **Add Description:** Provide additional context by entering a description if needed.

Payment

Configure payments options

☒ Accept payments ⓘ

Total Amount

100

USD

☒ Accept partial payment ⓘ

Amount

Percentage

Deposit Amount

20

USD

Description

Enter a description that will be displayed to the user, informing them about the payment

8. **Save Settings:** Click on save to apply the changes.

How to collect the remaining balance?

To collect the remaining payment, users must manually send the DRAFTED invoice that was created when partial payment was collected at booking. Simply head over to Payments > Invoices.

Note: Further improvements to the feature will automate this process in the future.

Key Benefits

This feature facilitates businesses in collecting deposit amounts, leading to a reduction in no-shows. By displaying the total cost of the appointment/service while offering the flexibility to pay only a deposit, businesses enhance the user experience without mandating upfront payments.

FAQs

Q: Which calendar type supports partial payments?

A: Partial payments can be enabled for all calendar types - Event, Round Robin, Collective, Class, Service Calendar and Service Menu.

Q: How do I manage pending payments?

A: Pending payments can be managed manually through the Payments > Invoices tab. Users can view the pending amount and collect it from the booker accordingly.

Q: Will bookers receive a notification about pending payments?

A: No, bookers will not be notified about pending payments. However, the staff members can check the pending amount under Payments > Invoices.

Q: Which payment gateways are supported for calendar payments?

A: Currently, the supported payment gateways for calendar payments are Stripe and Authorize.net.