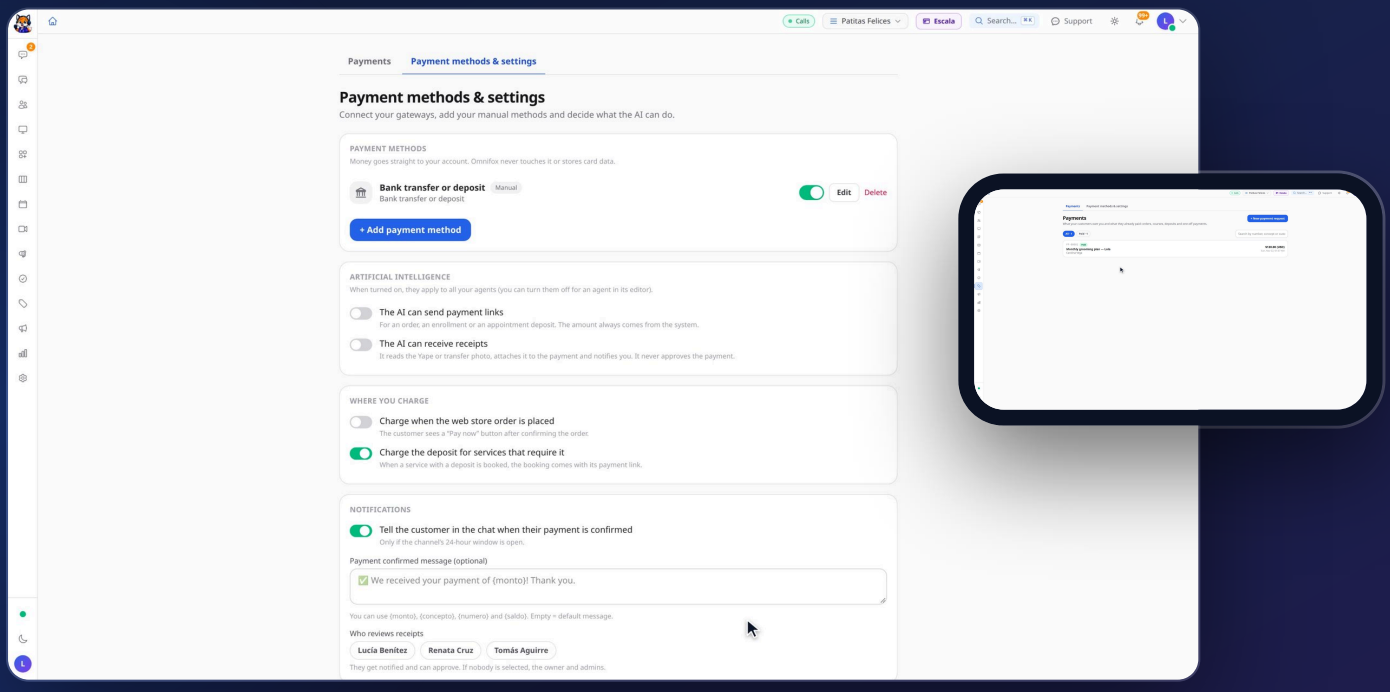
Omnifox

SHORT VIDEO · USER MANUAL

Payments: create and send a charge

Set up a bank transfer payment method, create a charge, send the payment link to the customer through the chat, receive their proof of payment and approve it, or record a payment by hand.



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Payments: create and send a charge

Hi! In this short video you'll charge a customer with Omnifox: set up a payment method, create the charge, send them the payment link through the chat, receive their proof of payment and mark it as paid.

The example is Patitas Felices, a fictional pet shop in Quito. The charge is paid by bank transfer: no payment gateway needed.

QUICK STEPS

1. Payments → Payment methods and settings → Add payment method → Bank transfer or deposit (or a gateway).
2. Payments → New charge: concept, amount, customer and expiry → Create charge.
3. Copy the payment link and send it to the customer through the chat.
4. The customer uploads their proof; in Proofs to review click Approve.
5. Payments made elsewhere: open the charge → Record a payment.

WATCH THE VIDEO

https://youtu.be/HfKigoFbG8g

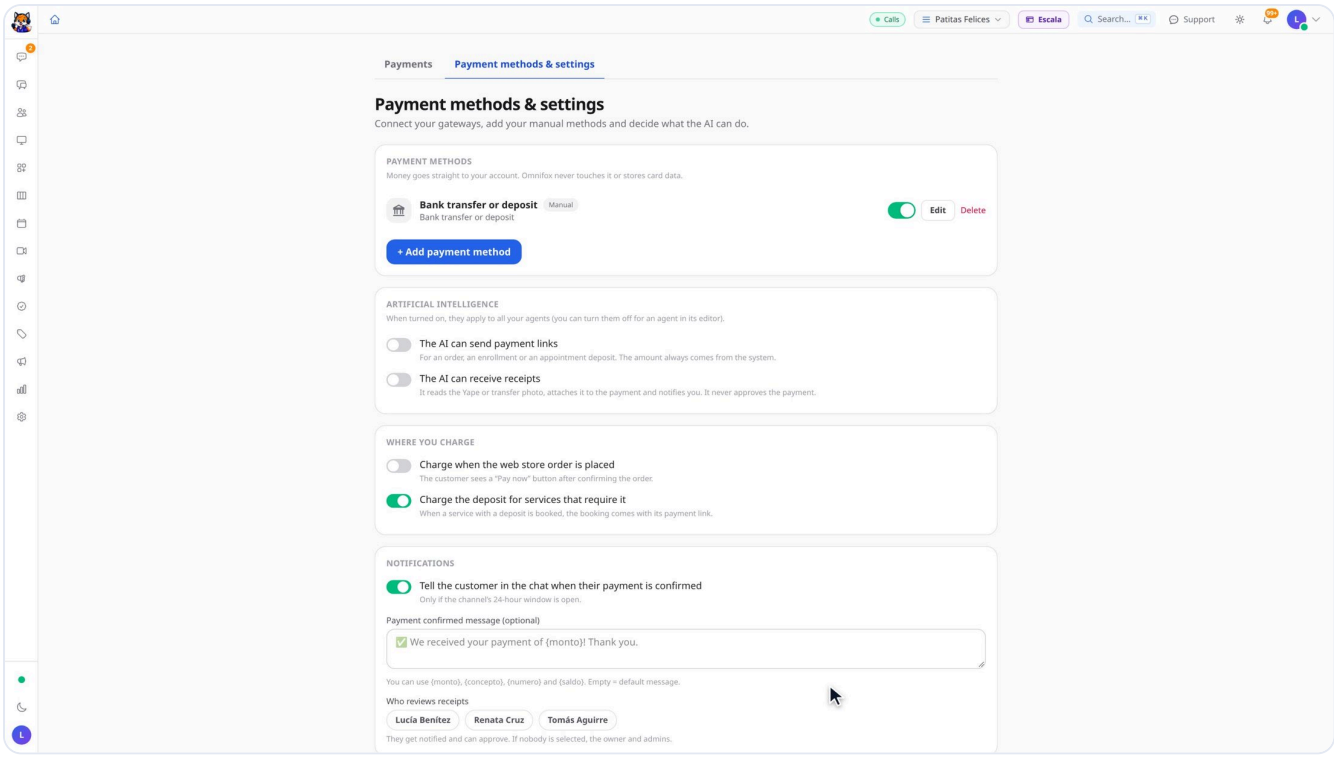
01

CHAPTER 1

Set up how you get paid

In Payments, Payment methods and settings tab, I click Add payment method. There are gateways, such as Mercado Pago, Stripe or PayPal, and manual payments, such as bank transfer, cash or your own payment link.

I choose Bank transfer or deposit, enter the bank, the account and the holder, and leave Ask for proof of payment on. I save.



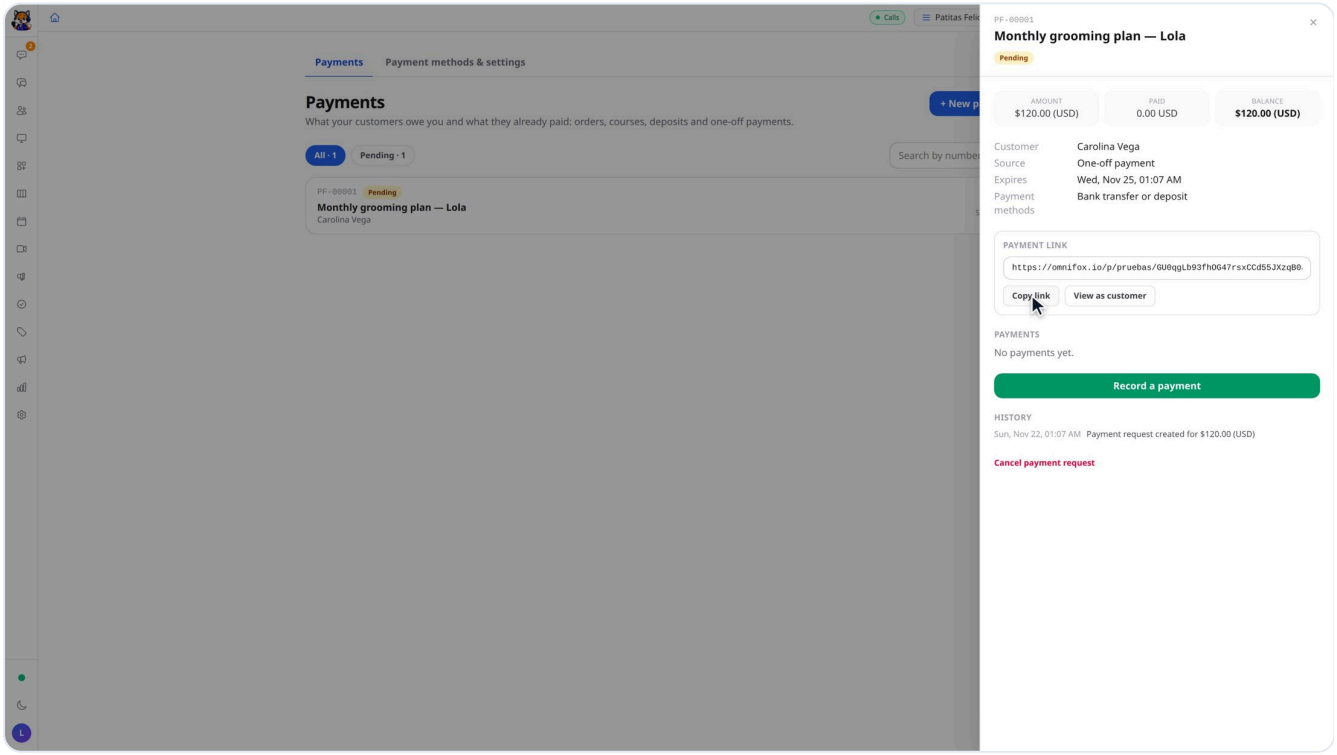
02

CHAPTER 2

Create a charge

In the Payments tab I click New charge. I enter the concept, the amount, the customer's name and in how many hours it expires. Create charge.

The charge is pending, with its number and its payment link. I copy it to send it to the customer.



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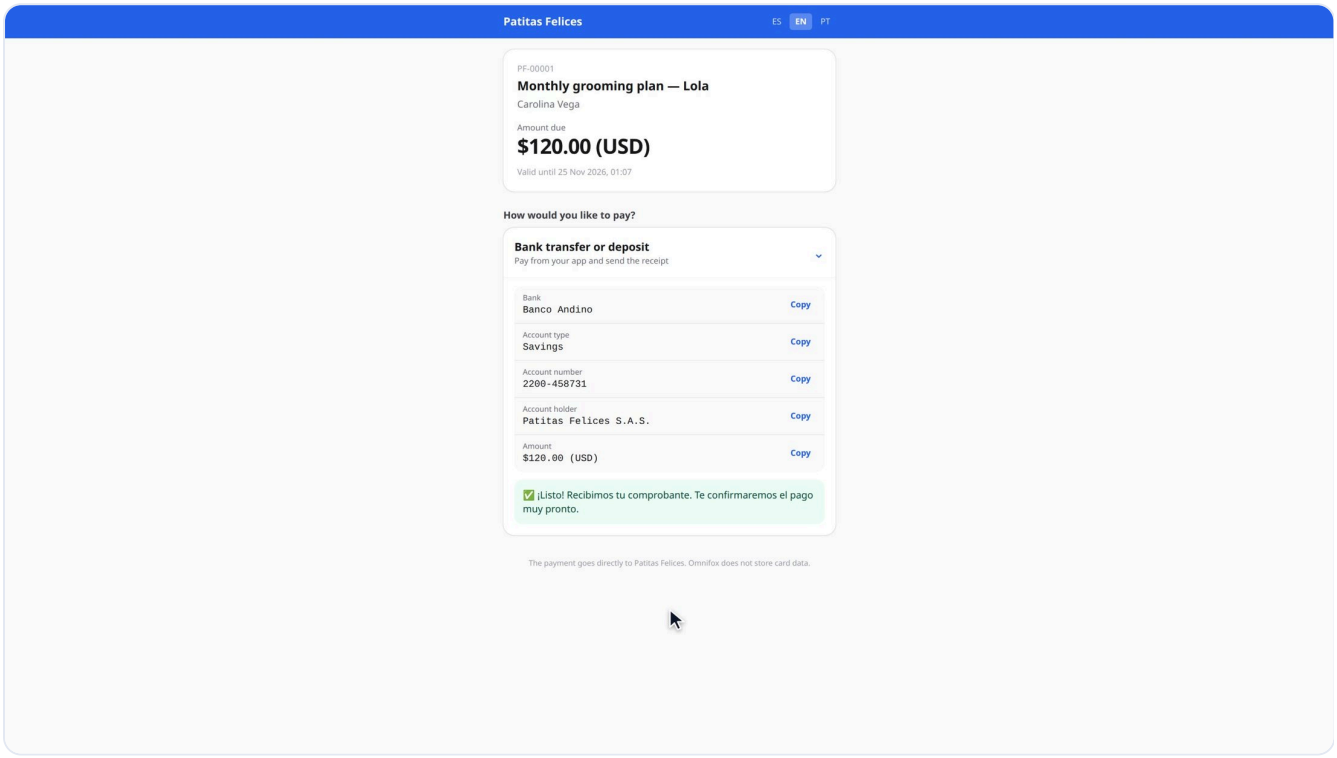
CHAPTER 3

What the customer sees

I paste the link into Carolina's chat. She opens it and sees the Patitas Felices payment page: the concept, the amount and how to pay.

She expands Bank transfer or deposit, sees the account details, uploads the photo of her receipt and clicks Send proof.



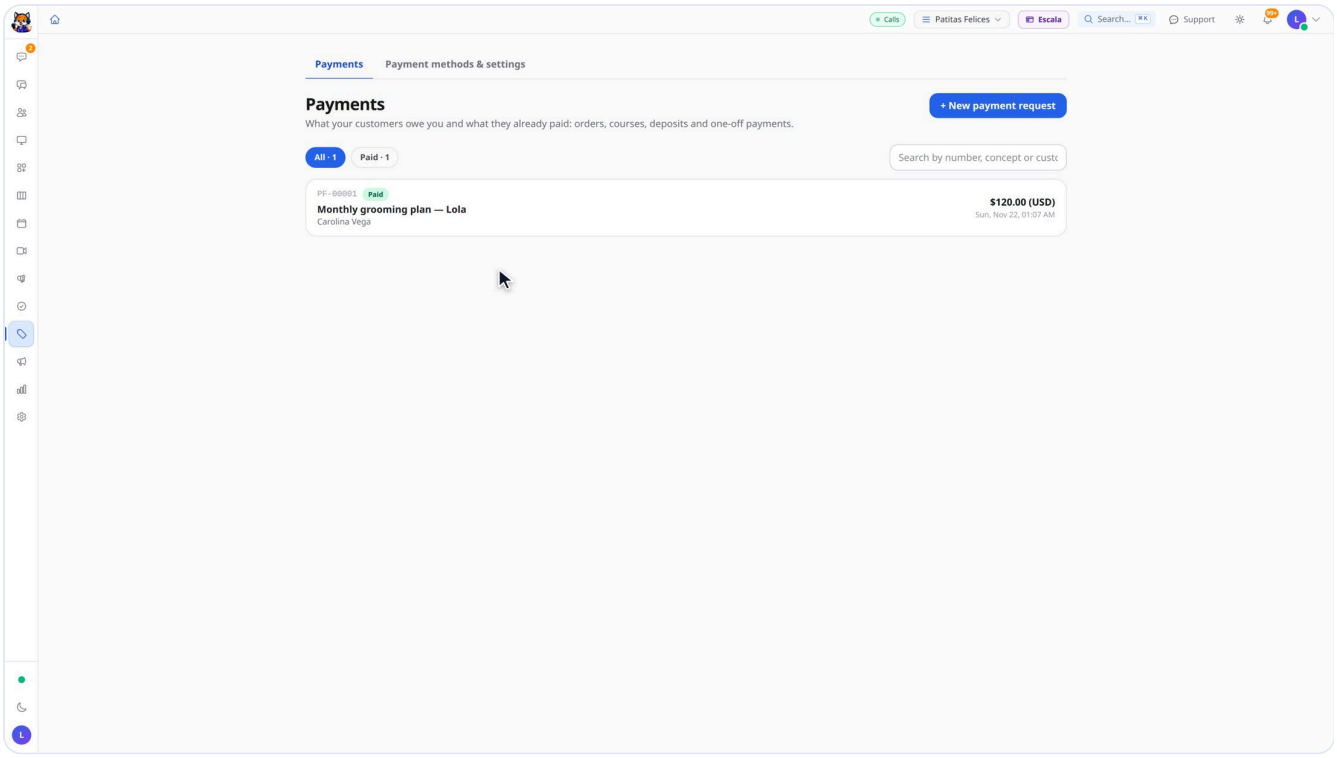
04

CHAPTER 4

Review the proof of payment

In Payments, Proofs to review appears. I check the receipt and click Approve: the charge becomes paid, and if you turned it on, the customer gets a confirmation message.

If they pay you in cash or some other way, open the charge and use Record a payment. And from an order, the Charge button creates the charge already linked to the conversation, with Send through the chat.



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Tips

- With manual methods you need no gateway: the customer pays elsewhere and sends the proof.
- From an order, the Charge button creates the charge linked to the conversation and allows Send through the chat.
- Approving or recording payments is only for owners, admins or reviewers.
- If you turn on the payment received message, the customer gets the confirmation in the chat.

More guides and videos in the help center: omnifox.io/help