Payment options checklist

Pick how you will take payment before you build the form. Tick each question once you know the answer.

Form or event: _____ Date: _____

Eight questions to answer first

☐ **1. What are you charging for, and how much?**
A seat, an order, a deposit or a share of a cost. Write the amount or the price list.
Your answer:

☐ **2. Is the price the same for everyone, or does it change with the answers?**
If it changes (guests, sizes, extras), you need a total worked out before people pay.
Your answer:

☐ **3. When must people pay: before their place counts, or later?**
If a place only counts once it is paid, pick a way where the payment and the response arrive together.
Your answer:

☐ **4. Is there a deadline or a cap on places?**
Write the closing date and the most responses you can take.
Your answer:

☐ **5. Who checks the payments, and how often?**
Name the person and the day of the week. Matching by hand takes longer as the list grows.
Your answer:

☐ **6. How will you match each payment to a person?**
A typed note, an email address or the response itself. Decide before you share the link.
Your answer:

☐ **7. What happens if someone asks for their money back?**
Write your refund rule in the form, and note where you will issue refunds.
Your answer:

☐ **8. What does each payment cost you?**
Check your payment provider's fees, and any add-on or tool price, on the day you decide.
Your answer:

Five ways to take payment, side by side

Way	When people pay	How you check who paid	What you export	Your notes
Payment link in the confirmation message	After they submit	Payment provider's records	Responses and payments, separately	
Payment link or QR code in the form	While they answer, in another tab	Payment provider's records plus the note they typed	Responses and payments, separately	
Collect first, then follow up yourself	When your message reaches them	Payment provider's records	Responses, payments and your own list of who owes	
Marketplace add-on	Depends on the add-on	Depends on the add-on: read its description	Depends on the add-on	
A form that takes the payment (HornetForms Payment block)	On Stripe's Checkout page, after they submit	Payment status on each response; unpaid ones wait in Awaiting payment	CSV and PDF with payment columns (Excel on Pro and Business)	

Add-ons differ. Read each add-on's own description, price and data access before you install it.

Go-live check

- ☐ Submit the form yourself on a phone and on a computer.
- ☐ Open every payment link or QR code and check it reaches the right account.
- ☐ Check the amount people see matches your price list, including any extras.
- ☐ Write your refund rule and your contact email where people can read them.
- ☐ Check what people see after they pay, and what they see if they stop halfway.
- ☐ Set your closing date and the cap on places, if you have them.

After each round of payments

- ☐ Export the responses and the payment records on the same day.
- ☐ Match each payment to a response, and mark the ones that do not match.
- ☐ Send your own message to anyone who answered but has not paid.
- ☐ Record refunds next to the response they belong to.
- ☐ Keep the export with your event or order records.

Fees and menus change. Check your payment provider's page and Google's help pages on the day you set it up.