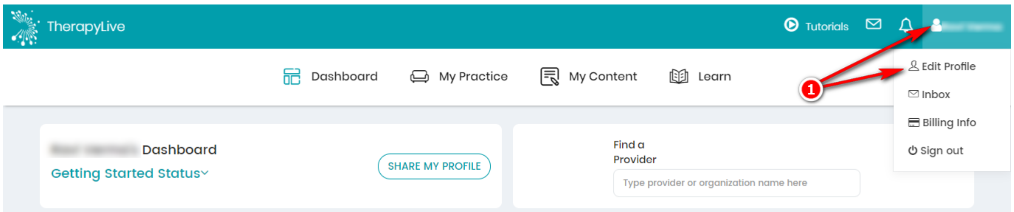
Knowledgebase > Billing and Payments > How do I set up receiving payments from clients?

How do I set up receiving payments from clients?

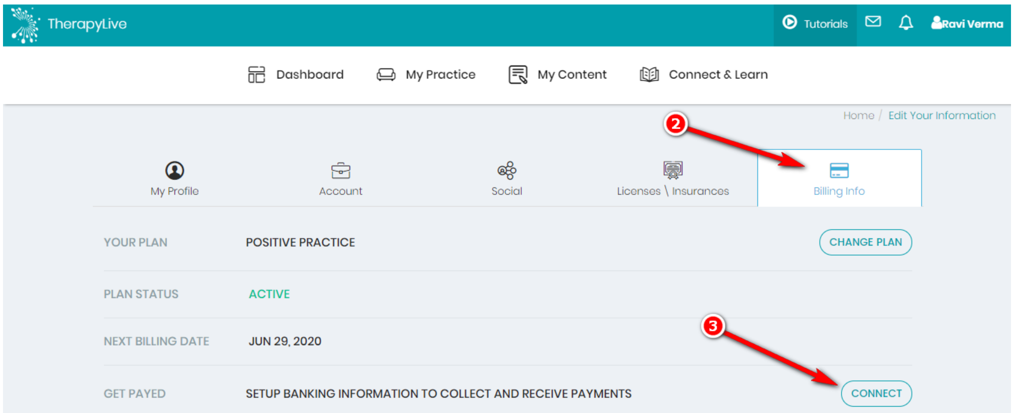
Customer Success Liaison - 2020-06-06 - in Billing and Payments

To receive payments from clients you will need to enter your banking information. Here are the steps to walk you through doing just that:

1. Click on your name on the top right corner and choose “Edit Profile” from the dropdown list.

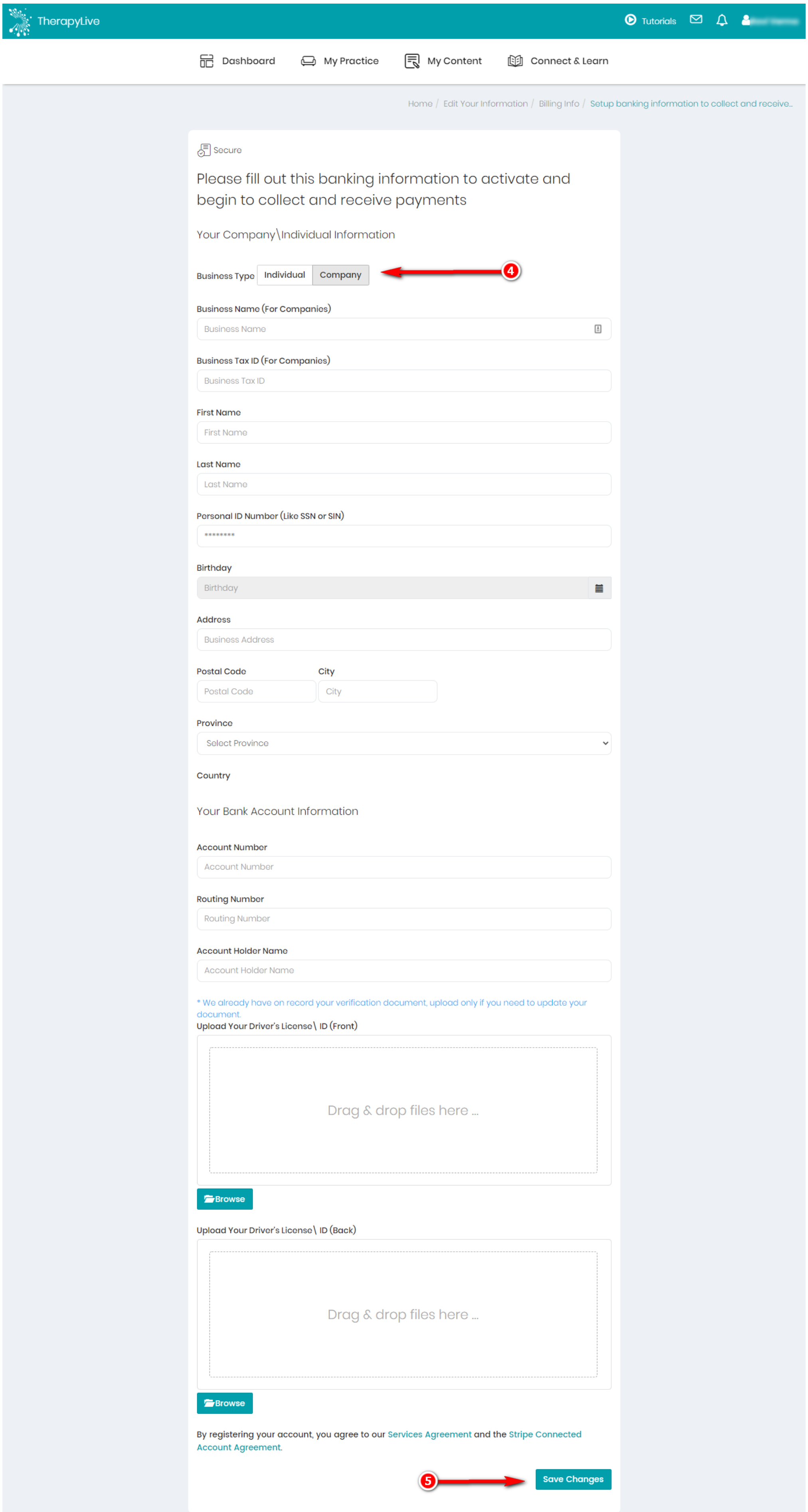


2. Click on the “Billing Info” tab.
3. In the section: “Get Payed - Set Up Banking Information To Collect And Receive Payments”, click on “Connect” to enter your banking details.



4. You have the option to enter your bank details as an individual or company. You will be required to provide the following details -
    1. Business Name (For Companies)
    2. Business Tax ID (For Companies)
    3. First Name
    4. Last Name
    5. Personal ID Number (Like SSN or SIN)
    6. Birthday
    7. Address

    8. Postal Code
    9. City
    10. Province
    11. Country
    12. Account Number
    13. Routing Number
    14. Account Holder Name
    15. Upload Your Driver's License\ ID (Front)
    16. Upload Your Driver's License\ ID (Back)
5. Click on the “Save Changes” button


TherapyLive
Tutorials
Dashboard
My Practice
My Content
Connect & Learn
Home / Edit Your Information / Billing Info / Setup banking information to collect and receive...
Secure
Please fill out this banking information to activate and begin to collect and receive payments
Your Company\Individual Information
Business Type
Individual
Company
4
Business Name (For Companies)
Business Name
Business Tax ID (For Companies)
Business Tax ID
First Name
First Name
Last Name
Last Name
Personal ID Number (Like SSN or SIN)
****
Birthday
Birthday
Address
Business Address
Postal Code
Postal Code
City
City
Province
Select Province
Country
Your Bank Account Information
Account Number
Account Number
Routing Number
Routing Number
Account Holder Name
Account Holder Name
* We already have on record your verification document, upload only if you need to update your document.
Upload Your Driver's License\ ID (Front)
Drag & drop files here ...
Browse
Upload Your Driver's License\ ID (Back)
Drag & drop files here ...
Browse
By registering your account, you agree to our Services Agreement and the Stripe Connected Account Agreement.
5
Save Changes