



## **Batch Payments guide for Agents**



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## What's changing

We're introducing a faster, more streamlined way to handle batch payments on the Planning Portal - designed to benefit both agents and their finance departments.

Each organisation interested in making batch payments will need to enter into an agreement with TerraQuest to facilitate this. As part of the setup, the organisation will be assigned dedicated bank account details.

Once set up, agents within the organisation will automatically see a new payment method available when submitting planning applications:

*"Send a payment request to your finance team"*

### How do you want to pay?

Please choose how you wish to pay for the application. You can make the payment yourself or nominate another person to pay.

- ☒ Send a payment request to your finance team
- ☐ Make the payment yourself
- ☐ Nominate someone to make payment



### Send a payment request to your finance team

Your company has a pre-existing agreement that allows your finance team to make batch payments.

- Select this option if you want your finance team to pay for this application on your behalf.
- We will send an email with details of this application to your finance team's registered email address: **finance@example.com**
- Once we receive payment, your application will be submitted and we will send you a confirmation email.

When this payment method is chosen, the system automatically triggers an email to the organisation's finance team.

The email includes key details about the application so that finance can authorise the payment. These include:

- Application reference (PP-12345678)
- Local Planning Authority (LPA)
- Applicant name and address
- Application site address
- Planning fee amount due
- Service charge information

This will be sent to the finance email address supplied by your organisation, such as: `finance@agency.com`

The finance team can then process the batch payment according to their internal financial procedures, using the dedicated bank account details to make payment.

The bank account details provided will depend on the organisation's financial structure. Each finance department will receive its own dedicated bank account details unique to their organisation or office.

For example, if an agency operates multiple offices across the UK and each location has its own finance team, then each team will be assigned separate bank account details.

However, if the organisation has a single, centralised finance department handling all transactions, only one set of bank account details will be issued.

### **Who it affects**

- Agents using the Planning Portal and submitting applications.
- Finance teams processing application payments on agent's behalf.

### **Benefits**

- Better security through dedicated bank details.
- Clearer reconciliation with unique account references.
- Smoother payment handoff to finance teams via automated emails.
- Consistent payment requests with standardised email templates.
- Reduced errors in manual bank transfers.
- Improved user experience for planners and finance.

## What's required to enable an organisation for batch payments

Only organisations with an agreement with the Planning Portal will have access to the batch payment facility.

To enable the new payment option, we will require:

- A list of Planning Portal accounts—identified by their registered email addresses—for all agents or employees your organisation wishes to enable for access to the Batch Payments facility.
- The dedicated finance email address to receive the finance notifications.

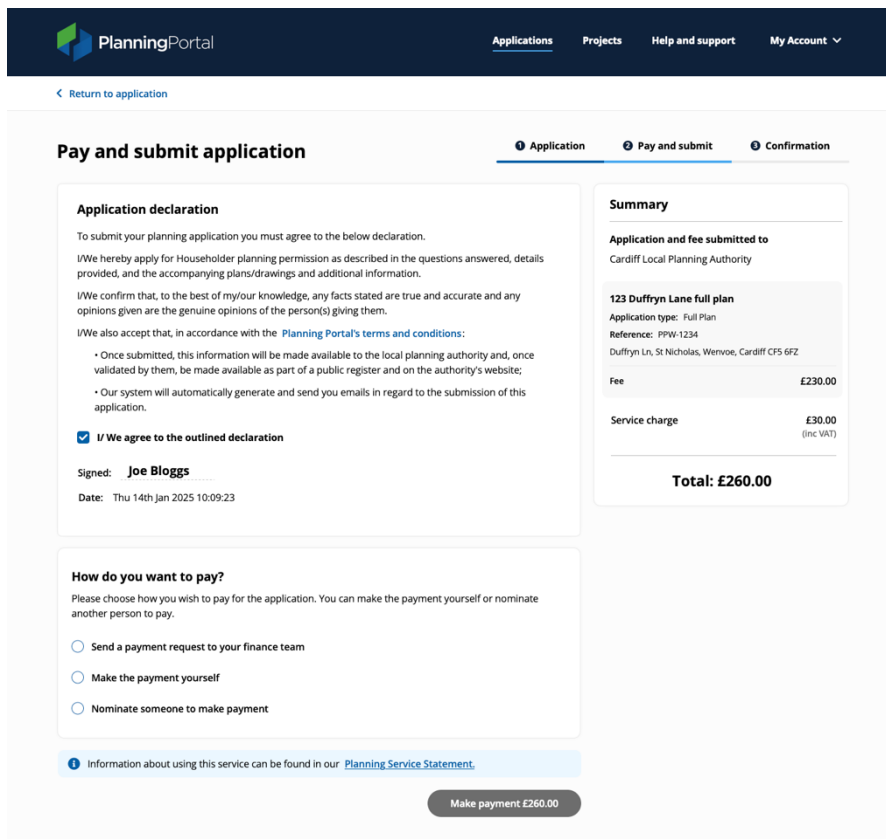
### Remittance advice

It is essential that the finance team provides remittance advice outlining which applications to reconcile the batch payment against. This breakdown is a critical requirement to ensure accurate and timely reconciliation of each application and must be included as part of the process.

If needed, we can provide a remittance advice template to support your reconciliation process. If you would like a copy, please let us know and we'll send it across.

## Agent user journey

1. Payment option available: "send a payment request to finance team"



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### Pay and submit application

#### Application declaration

To submit your planning application you must agree to the below declaration.

I/We hereby apply for Householder planning permission as described in the questions answered, details provided, and the accompanying plans/drawings and additional information.

I/We confirm that, to the best of my/our knowledge, any facts stated are true and accurate and any opinions given are the genuine opinions of the person(s) giving them.

I/We also accept that, in accordance with the [Planning Portal's terms and conditions](#):

- Once submitted, this information will be made available to the local planning authority and, once validated by them, be made available as part of a public register and on the authority's website;
- Our system will automatically generate and send you emails in regard to the submission of this application.

☒ I/We agree to the outlined declaration

Signed: **Joe Bloggs**

Date: Thu 14th Jan 2025 10:09:23

#### Summary

**Application and fee submitted to**  
Cardiff Local Planning Authority

**123 Duffryn Lane full plan**  
Application type: Full Plan  
Reference: PPW-1234  
Duffryn Ln, St Nicholas, Wenvoe, Cardiff CF5 6FZ

Fee	£230.00
Service charge	£30.00 (inc VAT)
<b>Total:</b>	<b>£260.00</b>

#### How do you want to pay?

Please choose how you wish to pay for the application. You can make the payment yourself or nominate another person to pay.

☐ Send a payment request to your finance team


☐ Make the payment yourself

☐ Nominate someone to make payment

[Information about using this service can be found in our \[Planning Service Statement\]\(#\).](#)

[Make payment £260.00](#)

## 2. Select payment option available: “send payment request to finance team”


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### Pay and submit application

1 Application
2 Pay and submit
3 Confirmation

#### Application declaration

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I/We also accept that, in accordance with the [Planning Portal's terms and conditions](#):

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☐ Make the payment yourself

☐ Nominate someone to make payment


#### Send a payment request to your finance team

Your company has a pre-existing agreement that allows your finance team to make batch payments.

- Select this option if you want your finance team to pay for this application on your behalf.
- We will send an email with details of this application to your finance team's registered email address: **agentfinance@example.com**
- Once we receive payment, your application will be submitted and we will send you a confirmation email.

[Information about using this service can be found in our \[Planning Service Statement\]\(#\).](#)

[Send request to finance team](#)





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3. Pop up to confirm sending of finance request

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Pay and submit application

1 Application

2 Pay and submit

3 Confirmation

Application declaration

To submit your planning application you must complete the following declaration:  
I/We hereby apply for Householder Development under Class O of the General Permitted Development Order 2015 as amended.  
I/We confirm that, to the best of our knowledge, the information provided and the accompanying documents are true and correct.  
I/We also accept that, in accordance with the provisions of the Town and Country Planning Act 1990 and the Town and Country Planning Regulations 2015:  

- Once submitted, this information will be made available to the public.
- Our system will automatically generate a unique reference number for each application.

☒ I/ We agree to the outline above

Signed: Joe Bloggs  
Date: Thu 14th Jan 2025 10:00 AM

Summary

Application submitted to:

Cardiff Local Planning Authority

Application name:

Full plan application for the conversion of a house into two flats at 123 Duffryn Lane, Wervoe, Cardiff CF5 6FZ.

Total:

£230.00

(inc VAT)

£30.00

Total: £260.00

Confirm payment request

Close X

You are about to send the payment details for this application to your finance team at <agentfinance@example.com>. Please review the information below before confirming.

Local authority:

Cardiff Local Planning Authority

Application name:

123 Duffryn Lane full plan

Application reference:

PPW-1234

Total:

£260.00

Cancel

Confirm and send

How do you want to pay?

Please choose how you wish to pay for the application. You can make the payment yourself or nominate another person to pay.

☒

 Send a payment request to your finance team

☐

 Make the payment yourself

☐

 Nominate someone to make payment

Send to finance team for payment request

Your company has a pre-existing agreement that allows your finance team to make payments in bulk.

- Select this option if you want your finance team to pay on your behalf.
- We'll send an email with your application details to your finance team's registered email: agentfinance@example.com
- Once we receive the funds, we'll process your application as usual and send you a confirmation email.

Information about using this service can be found in our [Planning Service Statement](#).

Send payment to finance team

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#### 4. Confirmation of payment request sent to finance team

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### Payment request sent to your finance team

The request will include details of the application and instructions on how to make payment.  
Once we have received payment, you will be notified by email that the application has been submitted.

#### Payment summary

**Application and fee submitted to:**

Cardiff Local Planning Authority

**123 Duffryn Lane full plan**


Application type: Full Plan  
Reference: PPW-1234  
Duffryn Ln, St Nicholas, Wenvoe, Cardiff CF5 6FZ

Fee	£230.00
Service charge	£30.00 (inc VAT)
<b>Total:</b>	<b>£260.00</b>


#### What happens next?

Once your payment has cleared you can expect to receive a response from the Local Planning Authority.




All further correspondence about your application should be sent to <LPA name> as they are responsible for processing your application once submitted and payment has cleared.



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5. Email notification - Individual application payment request sent to Agency finance team  
(draft email notification with content to be finalised)

**Subject: Planning application payment request: < reference > - < application type >**

Dear < finance email >,

<Agent name> has requested for you to make payment for application < application reference >.  
The details of your payment are shown below.

All payments must be made using the unique bank account details issued to your finance team when your organisation was setup to use the service.

Please do not send payments to the HSBC account ending in XXXX, as this account is no longer in use for payment processing. Using this account will result in significant delays in the submission of your application.

Please ensure you send payment remittance advice to us at [remittance@terraquest.co.uk](mailto:remittance@terraquest.co.uk)

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If you have a payment related query, please contact us on:

03333 233 900

[variations@planningportal.co.uk](mailto:variations@planningportal.co.uk)

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Payment request details

Name: < applicant name >

Email address: < applicant email address >

Title: < application title>

Application type: < application type>

Reference: < application reference >

Site address: < application address >

Application fee: < Applicant fee >

Description of service: Payment for planning application service.

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Service charge VAT

Service charge (excluding VAT): < Service charge excluding VAT >

Service charge VAT @ 20%: < Service charge @ 20% >

Service charge including VAT: < Service charge including VAT >

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Total (application fee + service charge): £260.00

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Please do not reply to this email as the mailbox is not monitored.

If you do need to contact us at Planning Portal, you can email [support@terraquest.co.uk](mailto:support@terraquest.co.uk)

For answers to common questions, please browse our FAQs on the Planning Portal website.

Regards,  
Planning Portal Team

The Planning Portal is an online application service provided by PortalPlanQuest and supports the submission of planning application information to local planning authorities in accordance with statutory regulations.

PortalPlanQuest Limited (reg. no 09400439) is a joint venture between the Ministry of Housing Communities & Local Government (MHCLG) and TerraQuest Solutions Limited.

[www.planningportal.co.uk](http://www.planningportal.co.uk)



## Batch payment process summary

### Step 1 - Organisation Setup

The organisation is onboarded for batch payments via the Planning Portal.

They are issued unique bank account details for transferring funds.

### Step 2 - Agent is ready to pay for an application.

They select  
"Send a payment request to your finance team."  
on checkout

They click "Send request to finance team."

The system automatically sends an email to the finance team.

This email includes:  
Agent details  
LPA Details  
Application details  
Payment details

### Step 3 - Finance Team Receives Payment Request

The organisation's finance team receives the email.

Using their unique bank details, they make payment in bulk following their internal processes.

### Step 4 - Payment Received

The Planning Portal's finance team receives the batch payment and remittance advice from the finance team.

They match and reconcile batch payments against submitted applications.

### Step 5 - Payment and Application matched

Applications get released to Local Authorities

The agent receives an email confirming application submission

The finance team receives a receipt confirmation.



## FAQs

### **What happens if the email doesn't arrive?**

Finance emails will be sent from [notifications@planningportal.co.uk](mailto:notifications@planningportal.co.uk). Make sure the finance team's mailbox allows emails from the Planning Portal. It may be necessary to check the junk or spam folder and mark the sender as safe.

### **Can the agent see when the payment is made?**

Yes. The agent will receive an application submission confirmation email once the payment has been received and processed by the Planning Portal.

### **Where to find their unique bank account details?**

Your organisation's dedicated bank account details will be provided during the onboarding process.

## **Questions about this payment process or document**

*Planning Portal Support*

Phone: 0333 323 4589

Email: [Support@planningportal.co.uk](mailto:Support@planningportal.co.uk)

## **Join our research**

We're keen to hear from planning agents like you. Join our user research to share your experiences and help us improve.

If you're interested in taking part or providing feedback:

Email: [nida.aziz@terraquest.co.uk](mailto:nida.aziz@terraquest.co.uk)