

AutoPay Sign Up & Management

The AutoPay feature will pay a customer's bill on the date designated by the client. The customer must have a default payment method to complete the AutoPay registration. Invoice Cloud checks the balance of the customer's bill prior to initiating the AutoPay.

How to Sign Up for AutoPay:

- From the Customer Portal the registered user selects the **>** button to the right of **AutoPay** or from the **My Profile** menu at the top of the screen they can select **AutoPay**.

Your Account At A Glance

I Want To...

Pay My Invoices

Manage My Accounts

AutoPay	✖ Not Enrolled	
Paperless	✓ Enrolled	
Pay By Text	✖ Not Enrolled	

Recent Open Invoices

Invoice Date	Due On	Balance Due
12/28/2021	1/21/2022	\$59.77

Recent Closed Invoices

Invoice Date	Account #	Record Type
11/29/2021	UTIL-1149	N
10/31/2021	UTIL-1149	N
10/13/2021	UTIL-1149	N

Recent Payments

Payment Date	Account #	Amount
12/29/2021	UTIL-1149	\$1.00
12/29/2021	UTIL-1149	\$1.00
11/19/2021	UTIL-1149	\$68.77

Upcoming Scheduled Payments

No History Available

or

The user can also access AutoPay from the **Manager Users** selection from the **My Profile** menu. From the list of users, select the one to add AutoPay but clicking on the arrow to the left of the name.

Manage Accounts

Add Account

The accounts that have been added to your profile are displayed below. You may open each one to configure settings.

Customer Name	Address	Account Number	Email Address
> Bob Marlon	9000 E. Honey Creek Street	UTIL-1153	ar@mail.com
Joel Calbhach	491 Bradford St.	UTIL-1149	ar@mail.com

Account Settings

Invoice Type(s)
Utility Services

Default Payment Method
VISA **** * 1111 exp. 08/23
[Edit payment methods](#)

[Remove this account from my profile](#)

Account Services

AutoPay
Not Enrolled
[Edit AutoPay enrollment](#)

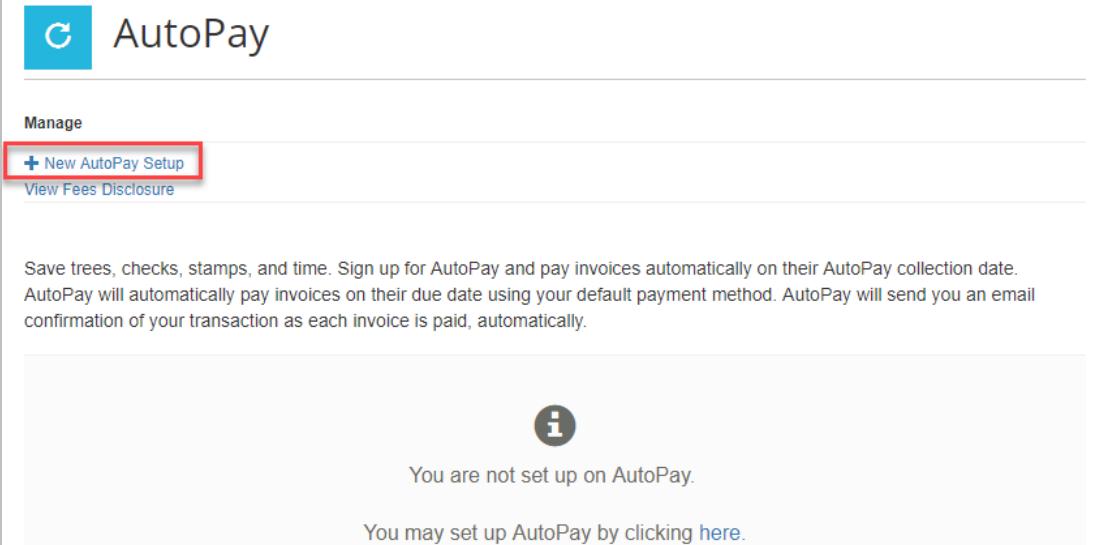
Paperless Billing
Not Enrolled
[Edit Paperless enrollment](#)

Pay By Text
Not Enrolled
[Edit Pay By Text enrollment](#)

> Melvin Foster	74 Pineknoll Dr.	UTIL-1148	ar@mail.com
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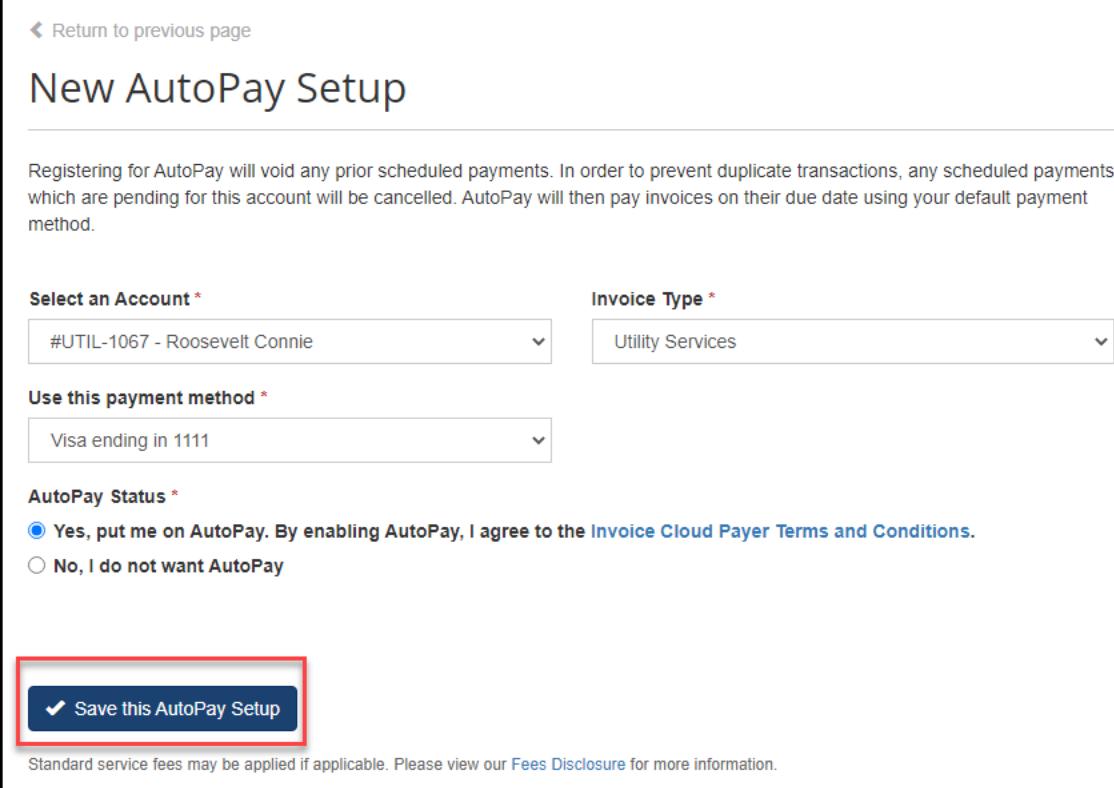
Note: Regardless of how the user accesses AutoPay, the following screen will appear:

2. From the AutoPay page the user selects, **New AutoPay Setup**.



The screenshot shows the 'AutoPay' page. At the top, there's a 'Manage' section with three options: 'New AutoPay Setup' (which is highlighted with a red box), 'View Fees Disclosure', and a small 'i' icon. Below this, a message encourages users to sign up for AutoPay, mentioning it saves time and uses their default payment method. A large 'i' icon with the text 'You are not set up on AutoPay.' is displayed, followed by a note that users can set it up by clicking a link.

3. From the setup page, the user verifies that the correct account is selected, the correct invoice type and the desired payment method. By enabling AutoPay, the user agrees to the Invoice Cloud Terms and Conditions. After those choices are made, the user clicks on **Save this AutoPay Setup**. The user will be sent an email that confirms the AutoPay registration. No action is needed.



The screenshot shows the 'New AutoPay Setup' page. It includes a 'Return to previous page' link, a title 'New AutoPay Setup', and a message about voiding prior scheduled payments. There are four main input fields: 'Select an Account' (dropdown menu showing '#UTIL-1067 - Roosevelt Connie'), 'Invoice Type' (dropdown menu showing 'Utility Services'), 'Use this payment method' (dropdown menu showing 'Visa ending in 1111'), and 'AutoPay Status'. Under 'AutoPay Status', two radio buttons are shown: one checked ('Yes, put me on AutoPay. By enabling AutoPay, I agree to the [Invoice Cloud Payer Terms and Conditions](#)') and one unselected ('No, I do not want AutoPay'). At the bottom, a large blue button with a checkmark and the text 'Save this AutoPay Setup' is highlighted with a red box. A small note at the very bottom states: 'Standard service fees may be applied if applicable. Please view our [Fees Disclosure](#) for more information.'

4. When the customer now visits their Portal dashboard a green checkmark confirms the user's AutoPay enrollment.

Your Account At A Glance

I Want To...

[Pay My Invoices ➤](#)

[Manage My Accounts ➤](#)

[Recent Open Invoices ➤](#)

Invoice Date	Due On	Balance Due
12/28/2021	1/21/2022	\$59.77

[Recent Closed Invoices ➤](#)

Invoice Date	Account #	Record Type
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10/31/2021	UTIL-1149	N
10/13/2021	UTIL-1149	N

[Recent Payments ➤](#)

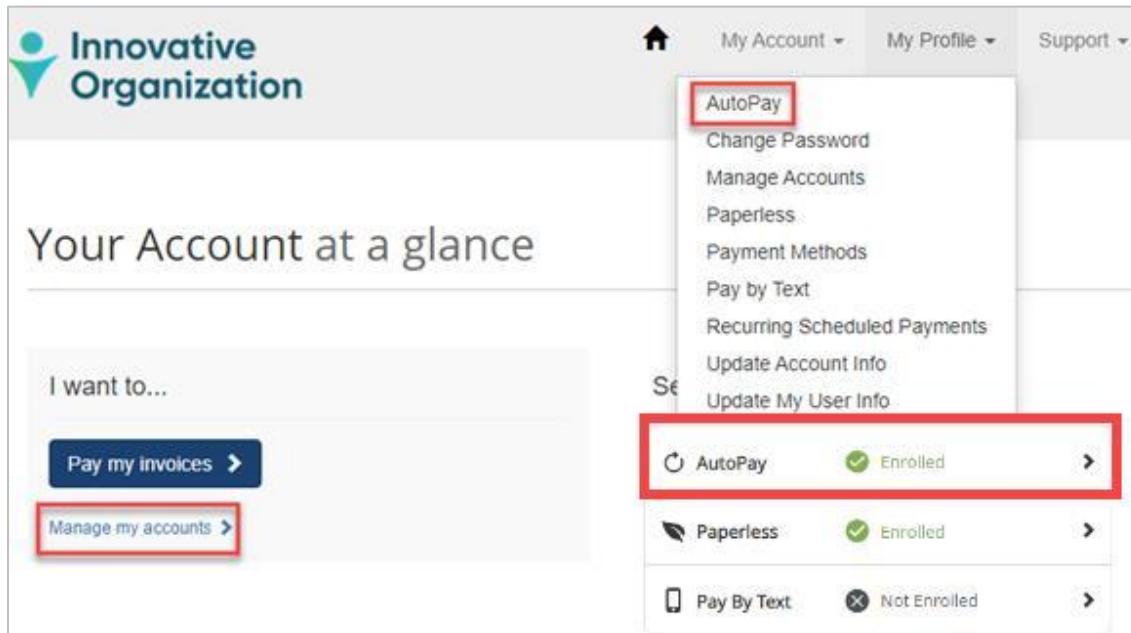
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11/19/2021	UTIL-1149	\$68.77

[Upcoming Scheduled Payments ➤](#)

No History Available

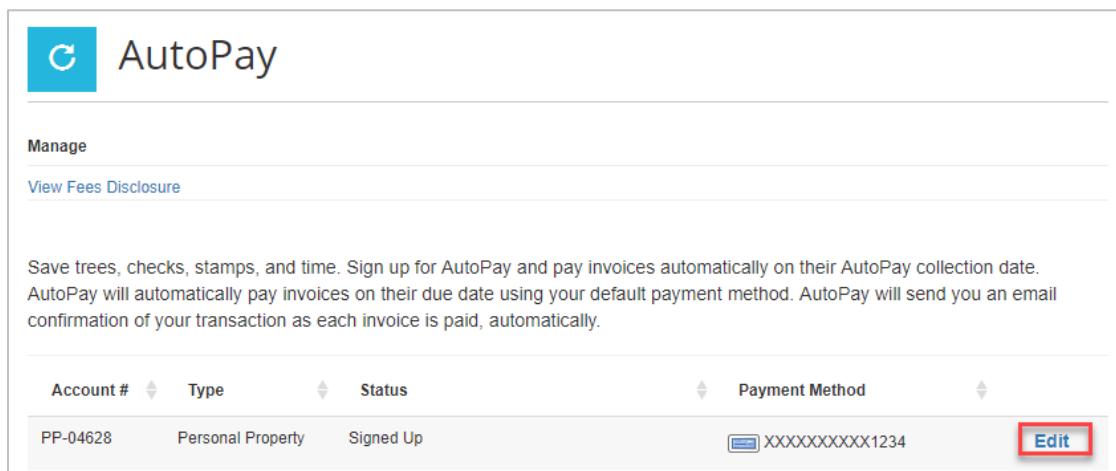
Manage AutoPay Settings

- From the Customer Portal dashboard, the user can select, **Manage my accounts**, **AutoPay**, or select **AutoPay** from the **My Profile** menu at the top of the page.



The screenshot shows the Customer Portal dashboard for 'Innovative Organization'. At the top right, there's a 'My Profile' dropdown menu. A red box highlights the 'AutoPay' option under this menu. On the left, there's a sidebar with a 'Your Account at a glance' section and a 'I want to...' section containing buttons for 'Pay my invoices' and 'Manage my accounts'. A red box highlights the 'Manage my accounts' button. Below these, there are three service cards: 'AutoPay' (status: Enrolled), 'Paperless' (status: Enrolled), and 'Pay By Text' (status: Not Enrolled). A red box highlights the 'AutoPay' card.

- From the AutoPay page the user selects **Edit**.



The screenshot shows the 'AutoPay' settings page. At the top, there's a 'Manage' link and a 'View Fees Disclosure' link. Below that, a descriptive text explains the benefits of AutoPay. A table lists account details: Account # PP-04628, Type Personal Property, Status Signed Up, Payment Method (with a credit card icon and the number XXXXXXXX1234), and an 'Edit' button. A red box highlights the 'Edit' button.

Account #	Type	Status	Payment Method	
PP-04628	Personal Property	Signed Up	XXXXXXX1234	Edit

3. The user can select another form of payment if one has been saved to their profile. If the user wishes to cancel AutoPay, the user selects **No, I do not want AutoPay**. After the choices are made, the user clicks on **Save this to AutoPay Setup**.

[◀ Return to previous page](#)

Edit AutoPay Setup

Registering for AutoPay will void any prior scheduled payments. In order to prevent duplicate transactions, any scheduled payments which are pending for this account will be cancelled. AutoPay will then pay invoices on their due date using your default payment method.

Select an Account * <input type="text" value="#UTIL-1064 - Gerry Derren"/>	Invoice Type * <input type="text" value="Utility Services"/>
Use this payment method * <input type="text" value="Bank of Poodles Checking Account Ending in 1234"/>	
AutoPay Status * <input type="radio"/> Yes, put me on AutoPay. By enabling AutoPay, I agree to the Invoice Cloud Payer Terms and Conditions . <input checked="" type="radio"/> No, I do not want AutoPay	
<input checked="" type="checkbox"/> Save this AutoPay Setup	

Standard service fees may be applied if applicable. Please view our [Fees Disclosure](#) for more information.

4. If the user cancels AutoPay, the following page appears confirming the AutoPay signup status.

 AutoPay

[Manage](#)

[View Fees Disclosure](#)

Save trees, checks, stamps, and time. Sign up for AutoPay and pay invoices automatically on their AutoPay collection date. AutoPay will automatically pay invoices on their due date using your default payment method. AutoPay will send you an email confirmation of your transaction as each invoice is paid, automatically.

Account #	Type	Status	Payment Method	
UTIL-1064	Utility Services	Not Signed Up	---	Edit