

## 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:

1. 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

1

Updated 12/29/2021

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

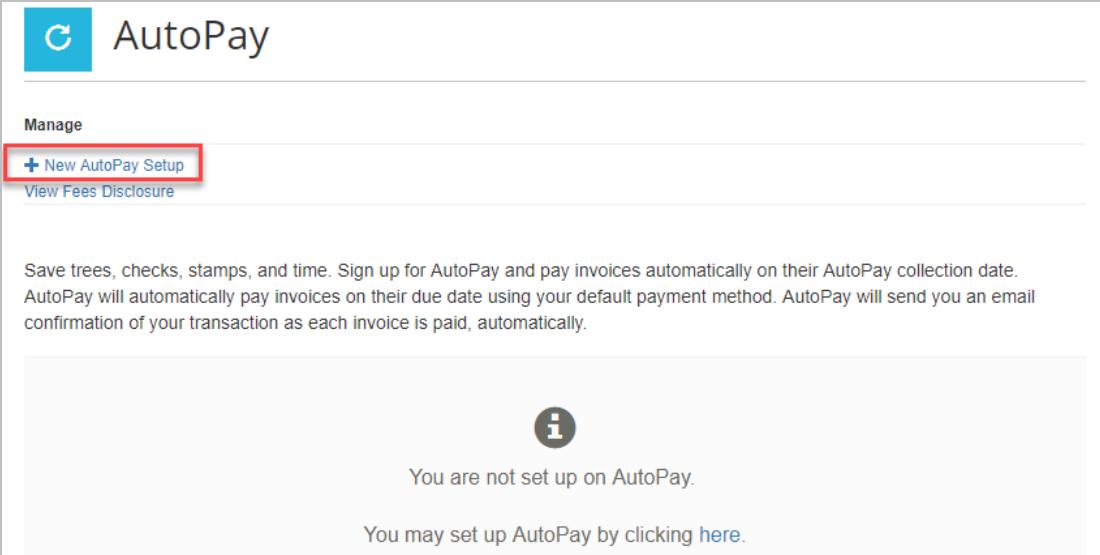
+ Add Account
X

**Info** 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
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><b>Account Settings</b></p> <p><b>Invoice Type(s)</b></p> <p>Utility Services</p> <hr/> <p><b>Default Payment Method</b></p> <p>VISA **** **** 1111 exp. 08/23</p> <p><a href="#">Edit payment methods</a></p> <hr/> <p><a href="#">Remove this account from my profile</a></p> </div> <div style="width: 45%;"> <p><b>Account Services</b></p> <div style="border: 2px solid red; padding: 5px;"> <p><b>AutoPay</b></p> <p>Not Enrolled</p> <p><a href="#">Edit AutoPay enrollment</a></p> </div> <hr/> <p><b>Paperless Billing</b></p> <p>Not Enrolled</p> <p><a href="#">Edit Paperless enrollment</a></p> <hr/> <p><b>Pay By Text</b></p> <p>Not Enrolled</p> <p><a href="#">Edit Pay By Text enrollment</a></p> </div> </div>			
> Melvin Foster	74 Pineknoll Dr.	UTIL-1148	ar@mail.com

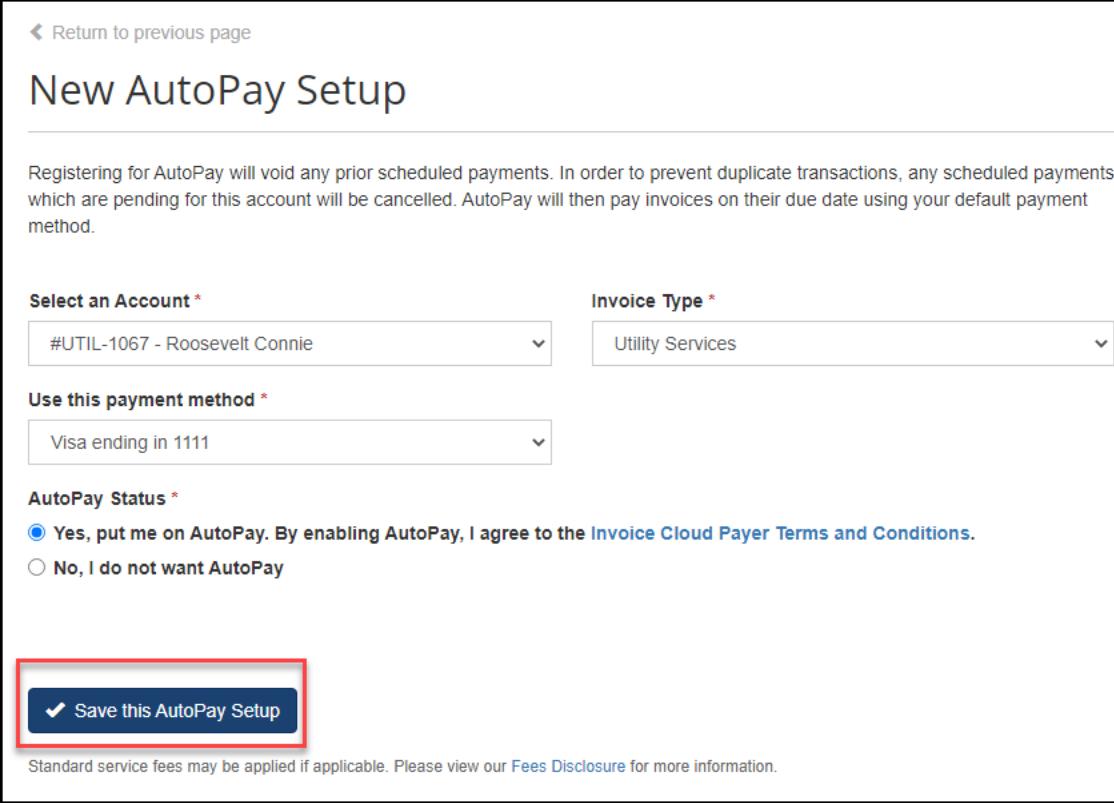
**Note:** Regardless of how the user accesses AutoPay, the following screen will appear:

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



The screenshot shows the 'AutoPay' page with a navigation bar at the top. Under 'Manage', the 'New AutoPay Setup' button is highlighted with a red box. Below the buttons is a text block: '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.' A small information icon (i) is present. Below the text, a message says 'You are not set up on AutoPay.' and 'You may set up AutoPay by clicking [here](#)'.

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. At the top, there is a link to 'Return to previous page'. The main title is 'New AutoPay Setup'. Below the title, a note states: '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.' There are three main sections for configuration: 'Select an Account \*' (dropdown menu showing '#UTIL-1067 - Roosevelt Connie'), 'Invoice Type \*' (dropdown menu showing 'Utility Services'), and 'Use this payment method \*' (dropdown menu showing 'Visa ending in 1111'). Below these are 'AutoPay Status \*' options: a radio button selected for 'Yes, put me on AutoPay. By enabling AutoPay, I agree to the [Invoice Cloud Payer Terms and Conditions](#).', and an unselected option 'No, I do not want AutoPay'. At the bottom, a large red box highlights the 'Save this AutoPay Setup' button. A 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
11/29/2021	UTIL-1149	N
10/31/2021	UTIL-1149	N
10/13/2021	UTIL-1149	N

[Recent Payments ➔](#)

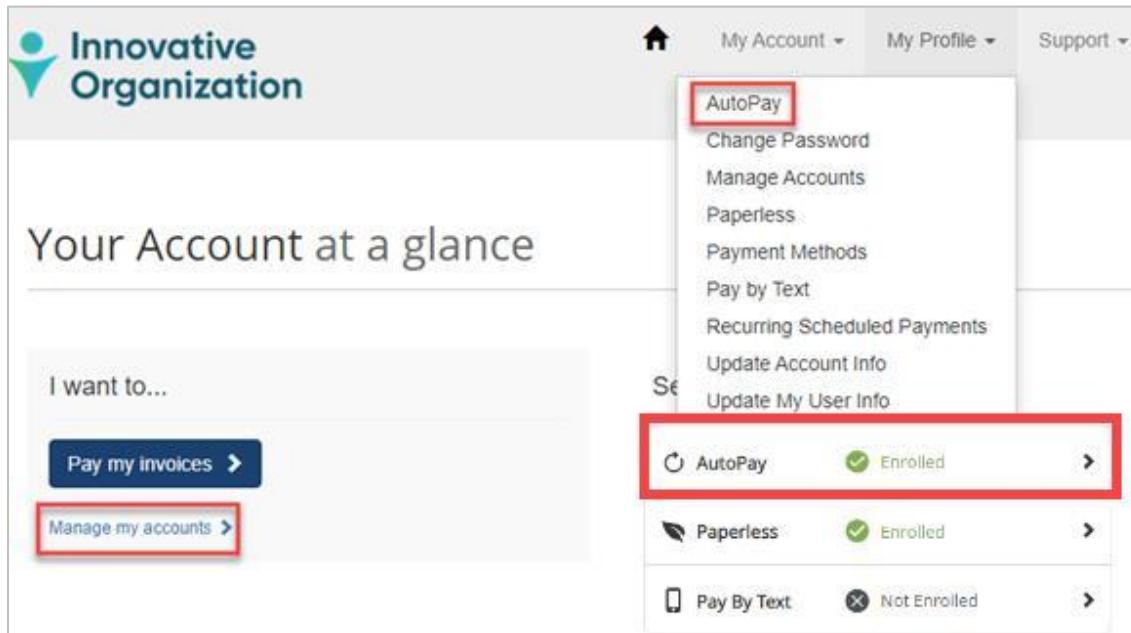
Payment Date	Account #	Amount
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11/19/2021	UTIL-1149	\$68.77

[Upcoming Scheduled Payments ➔](#)

*No History Available*

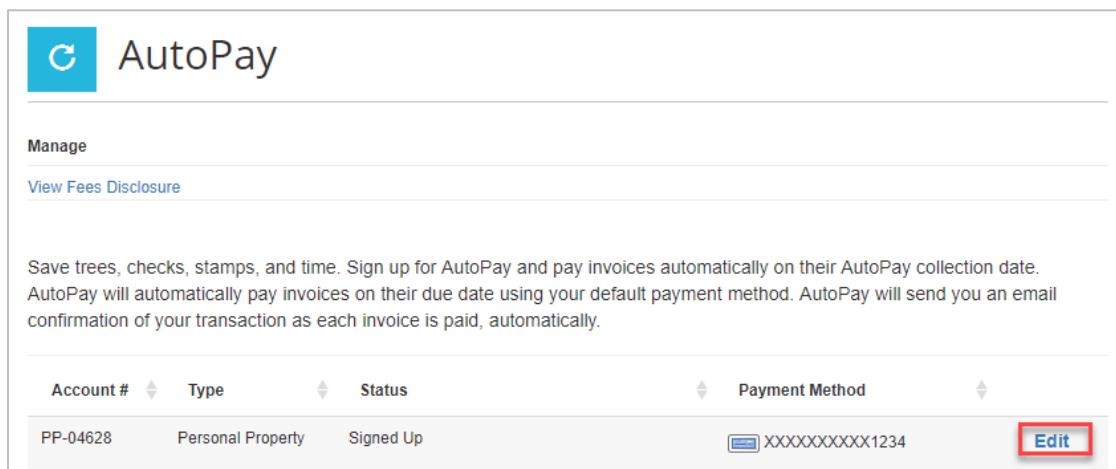
## Manage AutoPay Settings

- 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'. The main heading is 'Your Account at a glance'. Below it, there's a section titled 'I want to...' with buttons for 'Pay my invoices' and 'Manage my accounts'. The 'Manage my accounts' button is highlighted with a red box. At the top right, there's a 'My Profile' menu with several options: 'AutoPay', 'Change Password', 'Manage Accounts', 'Paperless', 'Payment Methods', 'Pay by Text', 'Recurring Scheduled Payments', 'Update Account Info', and 'Update My User Info'. The 'AutoPay' option is also highlighted with a red box. Below this menu, there are three cards: 'AutoPay' (status: Enrolled), 'Paperless' (status: Enrolled), and 'Pay By Text' (status: Not Enrolled). The 'AutoPay' card is highlighted with a red box.

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



The screenshot shows the 'AutoPay' management page. The title is 'AutoPay'. Below it, there's a 'Manage' section with a 'View Fees Disclosure' link. A descriptive text block says: '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.' Below this is a table with columns: 'Account #', 'Type', 'Status', and 'Payment Method'. The table has one row: 'PP-04628', 'Personal Property', 'Signed Up', and a payment method icon followed by 'XXXXXXXXXX1234'. An 'Edit' button is located to the right of the payment method column, highlighted with a red box.

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.

<b>Select an Account *</b>	<b>Invoice Type *</b>
<input type="text" value="#UTIL-1064 - Gerry Derren"/>	<input type="text" value="Utility Services"/>
<b>Use this payment method *</b>	
<input type="text" value="Bank of Poodles Checking Account Ending in 1234"/>	
<b>AutoPay Status *</b>	
<input type="radio"/> Yes, put me on AutoPay. By enabling AutoPay, I agree to the <a href="#">Invoice Cloud Payer Terms and Conditions</a> .	
<input checked="" type="radio"/> No, I do not want AutoPay	
<input checked="" type="checkbox"/> Save this AutoPay Setup	
<small>Standard service fees may be applied if applicable. Please view our <a href="#">Fees Disclosure</a> for more information.</small>	

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	---