

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 selects **AutoPay**.

our Acc	ount At A	A Glance									
Pay My Invoices Manage My Accounts			Image: AutoPay Image: Not Enrolled Image: Paperless Image: Enrolled Image: Pay By Text Image: Not Enrolled								
						Recent Oper	n Invoices 👂		Recent Close	d Invoices	>
Invoice Date	Due On	Balance Due	Invoice Date	Account #	Record Type						
Invoice Date 12/28/2021	Due On 1/21/2022	Balance Due \$59.77	11/29/2021	Account # UTIL-1149	Record Type N						
			11/29/2021 10/31/2021	UTIL-1149 UTIL-1149	N N						
12/28/2021	1/21/2022		11/29/2021 10/31/2021 10/13/2021	UTIL-1149 UTIL-1149 UTIL-1149	N N N						
12/28/2021	1/21/2022		11/29/2021 10/31/2021	UTIL-1149 UTIL-1149 UTIL-1149	N N N						
12/28/2021	1/21/2022		11/29/2021 10/31/2021 10/13/2021 Upcoming Sc	UTIL-1149 UTIL-1149 UTIL-1149	N N Payments						
12/28/2021 Recent Paym Payment Date 12/29/2021	1/21/2022	\$59.77 Amount \$1.00	11/29/2021 10/31/2021 10/13/2021 Upcoming Sc	UTIL-1149 UTIL-1149 UTIL-1149 heduled P	N N Payments						
12/28/2021 Recent Paym	1/21/2022	\$59.77 Amount	11/29/2021 10/31/2021 10/13/2021 Upcoming Sc	UTIL-1149 UTIL-1149 UTIL-1149 heduled P	N N Payments						

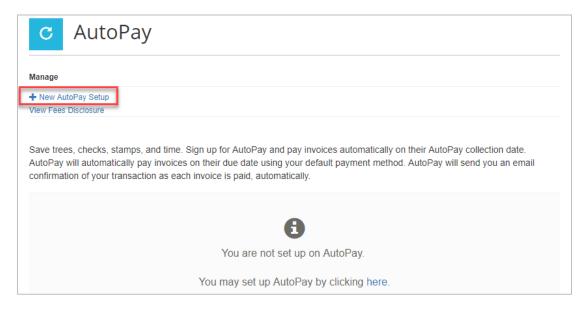
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The user can also access AutoPay from the **Manager Users** selection from the **My Profile** menu. From the list of users, select the one to add AutoPay but clicking on the arrow to the left of the name.

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		A	Account Services				
	Invoice Type(s)	es		A	AutoPay			
	Utility Services			٨	lot Enrolled			
	Default Payment Met			E	dit AutoPay enrollment			
	VISA **** **** **** 1111 e		23	Paperless Billing				
	Edit payment methods				Not Enrolled Edit Paperless enrollment			
	Remove this account fro	m my p	rofile	E				
				F	Pay By Text			
					lot Enrolled			

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

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



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.

Return to previous page			
New AutoPay Setup			
Registering for AutoPay will void any prior schedul which are pending for this account will be cancelle method.			
Select an Account *		Invoice Type *	
#UTIL-1067 - Roosevelt Connie	~	Utility Services	~
Use this payment method *			
Visa ending in 1111	~		
AutoPay Status *			
Yes, put me on AutoPay. By enabling AutoPage	ay, I agree to th	e Invoice Cloud Payer Terms and Co	onditions.
○ No, I do not want AutoPay			
 Save this AutoPay Setup Standard service fees may be applied if applicable. Please 	view our Fees Dis	closure for more information.	

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

AutoPay Enrolled Paperless Enrolled Pay By Text Not Enrolled
Pay By Text Not Enrolled
ecent Closed Invoices 👂
Invoice Date Account # Record Type
Invoice Date Account # Record Type 11/29/2021 UTIL-1149 N
10/31/2021 UTIL-1149 N
10/13/2021 UTIL-1149 N
Ipcoming Scheduled Payments >
No History Available
NO RISIOLA AVAILABLE

Manage AutoPay Settings

1. 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.

Innovative Organization	My Account - My Profile - Suppo	rt -
Your Account at a glance	Change Password Manage Accounts Paperless Payment Methods Pay by Text	
I want to	Recurring Scheduled Payments Update Account Info Se Update My User Info	
Pay my invoices 🗲	🔿 AutoPay 🥝 Enrolled 🔷 🗲	
Manage my accounts >	Paperless 🔗 Enrolled	
	Pay By Text Not Enrolled	

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

utomatically on their AutoPay colle yment method. AutoPay will send	
Payment Method	\$
XXXXXXXXXXXX1234	Edit
	yment method. AutoPay will send

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 pay which are pending for this account will be cancelled. Auto method.		the second s	· · · · · · · · · · · · · · · · · · ·
Select an Account *		Invoice Type *	
#UTIL-1064 - Gerry Derren	~	Utility Services	~
Use this payment method *			
Bank of Poodles Checking Account Ending in 1234	~		
AutoPay Status *			
 ○ Yes, put me on AutoPay. By enabling AutoPay, I ag ● No, I do not want AutoPay 	ree to t	he Invoice Cloud Payer Terms and Condi	itions.
Save this AutoPay Setup Standard service fees may be applied if applicable. Please view outputs	ır Fees Di	sclosure for more information.	

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

C AutoPay		
Manage		
View Fees Disclosure		
Save trees, checks, stamps, and time. Sign up for AutoPay an AutoPay will automatically pay invoices on their due date using confirmation of your transaction as each invoice is paid, autom	g your default payment method. AutoPay will ser	
Account # 💠 Type 🔶 Status	Payment Method	÷
UTIL-1064 Utility Services Not Signed Up		Edit