

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	
Want To			C AutoPay Not Enrolled
Pay My Invoices > Manage My Accounts >			Paperless S Enrolled
			D Pay By Text Not Enrolled
Recent Oper	Invoices 🕻		Recent Closed 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	Invoice Date Account # Record Type 11/29/2021 UTIL-1149 N
Invoice Date 12/28/2021	Due On 1/21/2022	Balance Due \$59.77	Invoice Date Account # Record Type 11/29/2021 UTIL-1149 N 10/31/2021 UTIL-1149 N 10/43/2021 UTIL-1149 N
Invoice Date 12/28/2021	Due On 1/21/2022	Balance Due \$59.77	Invoice DateAccount #Record Type11/29/2021UTIL-1149N10/31/2021UTIL-1149N10/13/2021UTIL-1149N
Invoice Date 12/28/2021 Recent Paym	Due On 1/21/2022	Balance Due \$59.77	Invoice DateAccount #Record Type11/29/2021UTIL-1149N10/31/2021UTIL-1149N10/13/2021UTIL-1149NUpcoming Scheduled Payments >
Invoice Date 12/28/2021 Recent Paym Payment Date	Due On 1/21/2022	Balance Due \$59.77	Invoice Date Account # Record Type 11/29/2021 UTIL-1149 N 10/31/2021 UTIL-1149 N 10/13/2021 UTIL-1149 N UDpcoming Scheduled Payments >
Invoice Date 12/28/2021 Recent Paym Payment Date 12/29/2021	Due On 1/21/2022	Balance Due \$59.77 Amount \$1.00	Invoice DateAccount #Record Type11/29/2021UTIL-1149N10/31/2021UTIL-1149N10/13/2021UTIL-1149NUpcoming Scheduled Payments >
Invoice Date 12/28/2021 Recent Payment Payment Date 12/29/2021 12/29/2021	Due On 1/21/2022	Balance Due \$59.77 Amount \$1.00 \$1.00	Invoice DateAccount #Record Type11/29/2021UTIL-1149N10/31/2021UTIL-1149N10/13/2021UTIL-1149N

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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	Account Settings		,	Account Services			
	Invoice Type(s)				AutoPay	٦		
	Utility Services	Vethod 1 exp. 08/23		1	Not Enrolled Edit AutoPay enrollment			
	Default Payment Met			E				
	VISA **** **** **** 1111 e			ł	Paperless Billing			
	Edit payment methods				Not Enrolled			
	Remove this account fro	ove this account from my profile		E -	Edit Paperless enrollment			
				I	Pay By Text			
					let Carelled			

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

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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 cancelled method.	ed payments. Ir d. AutoPay will	n order to prevent duplicate transactions then pay invoices on their due date usir	s, any scheduled payments ng your default payment
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 AutoPa	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.

Your Acc	ount At A	Glance	
I Want To			C AutoPay C Enrolled
Pay My Invoices	•		▼ Paperless S Enrolled >
Manage My Accounts >			Pay By Text Not Enrolled
Recent Open	Due On 1/21/2022	Balance Due \$59.77	Recent Closed InvoicesInvoice DateAccount #Record Type11/29/2021UTIL-1149N10/31/2021UTIL-1149N10/13/2021UTIL-1149N
Recent Paym	ients 🕻		Upcoming Scheduled Payments >
Payment Date	Account #	Amount	No History Available
12/29/2021	UTIL-1149	\$1.00	
12/29/2021	UTIL-1149	\$1.00	
11/19/2021	UTIL-1149	\$68.77	

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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 - S AutoPay	upport -
Your Account at a glance	Change Password Manage Accounts Paperless Payment Methods Pay by Text	
I want to	Recurring Scheduled Payments Update Account Info S€ 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	ection date. you an email
Payment Method	\$
XXXXXXXXXXXX1234	Edit
	utomatically on their AutoPay colle yment method. AutoPay will send Payment Method

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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.	ments. Ir Pay will	n order to prevent duplicate transactions, a then pay invoices on their due date using y	ny scheduled payments /our default payment
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 th	e Invoice Cloud Payer Terms and Cond	itions.
Save this AutoPay Setup Standard service fees may be applied if applicable. Please view out	ır Fees Di:	closure for more information.	

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

C Al	utoPay			
Manage				
View Fees Disclos	ure			
Save trees, che	cks, stamps, and	time. Sign up for AutoPay and p	ay invoices automatically on their AutoPay c	ollection date.
confirmation of y	your transaction a	voices on their due date using yo as each invoice is paid, automati	our default payment method. AutoPay will se cally.	nd you an email
confirmation of y Account #	your transaction a	voices on their due date using yo as each invoice is paid, automati	our default payment method. AutoPay will se cally. Payment Method	nd you an email
Account #	transaction a Type Utility Services	voices on their due date using yo as each invoice is paid, automati Status Not Signed Up	our default payment method. AutoPay will se cally. Payment Method 	nd you an email ¢ Edit