

# AutoPay Sign Up & Management

The AutoPay feature will pay a customer's bill on the date designated by the client. The customer must be registered and have a default payment method saved to their customer profile. Invoice Cloud checks the balance of the customer's invoice prior to initiating the AutoPay.

## How to Sign Up for AutoPay:

1. From the Customer Portal the registered user selects the **Edit** 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




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I want to...

[Pay my invoices >](#)

- View my payment history >
- View my scheduled payment history >
- Manage my AutoPay settings >
- Manage my Paperless settings >
- Update my account information >

Services

	AutoPay	<a href="#" style="color: #0070c0;">EDIT</a>
	Paperless	<a href="#" style="color: #0070c0;">EDIT</a>
	Pay By Text	<a href="#" style="color: #0070c0;">EDIT</a>

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Recent Open Invoices >

Due On	Invoice Date
7/25/2019	6/1/2019

Recent Closed Invoices >

Invoice Date	Account #
4/12/2019	PP-04628

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Recent Payments >

Payment Date	Account #	Amount
4/5/2019	PP-04628	\$220.32
4/5/2019	PP-04628	\$0.40

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

**i** 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

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

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[Remove this account from my profile](#)

### Account Services

**AutoPay**  
Not Enrolled  
[Edit AutoPay enrollment](#)

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

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**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:


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

## AutoPay

Manage

**+ New AutoPay Setup**  
[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.

 You are not set up on AutoPay.  
You may set up AutoPay by clicking [here](#).

- From the setup page, the user verifies that the correct account is selected, the correct invoice type and the desired payment method. After those choices are made, the user clicks on **Save this to AutoPay Setup**.

## New 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 \*** **Invoice Type \***

#PP-04628 - MALKIN ANDREW & Personal Property

**Use this payment method \***

My Bank Account: XXXXXXXXXXX1234


**AutoPay Status \***

Yes, put me on AutoPay  
 No, I do not want AutoPay

**✓ Save this AutoPay Setup**

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

- 4. The user will be sent an email to complete the AutoPay registration. The AutoPay registration is not complete until the user opens the email and selects **Complete Registration**. If the user does not confirm via their email, a red warning flag appears on the AutoPay page to alert them of the incomplete registration. The user has the option to **Resend** the email notification to complete the AutoPay registration.



# AutoPay

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**Manage**



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[View Fees Disclosure](#)

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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.

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Account #	Type	Status	Payment Method	
PP-04628	Personal Property	 <b>Waiting on email confirmation.</b>	 XXXXXXXXXXX1234	<b>Edit</b>

[Resend](#) | [Cancel Pending Registration](#)

- The email notification contains all of the Terms and Conditions, the Electronic Signature Disclosure and a link the user must click on to complete the AutoPay registration.

<p><b>I have read and Agree to the AutoPay Terms and Conditions below.</b></p>	<p><b><u>Complete Registration</u></b></p>
<p><b>Dear MALKIN ANDREW &amp;</b></p>	
<p>Thank you for enrolling in Training - TEST's automatic payment program on 4/5/2019 1:47:11 PM. You will receive an email notification of your upcoming invoice and automatic payment date three days prior to the processing date. If you have any outstanding scheduled payments, they will be replaced by the AutoPay program and you will not be charged twice. Please note that convenience fees (if applicable) are the same as those for real-time or scheduled payments.</p> <p>By enrolling in Auto-Pay, you have automatically been invited to go paperless. When you go paperless, you will no longer receive paper statements (unless legally required to do so for your bill type). You may reinstate paper invoicing at any time via your account profile. You will receive a Paperless Confirmation email, if you wish to go paperless, please confirm by clicking on the "Complete Registration" button. If you prefer not to go paperless, simply do not respond and the invitation will be cancelled.</p> <p>If you have questions about your account, a recent charge or payment, please send email to <a href="mailto:trainingTest@invoicecloud.com">trainingTest@invoicecloud.com</a>.</p> <p><i>Please Note: To ensure delivery of account related email notifications, please add <a href="mailto:no-reply@invoicecloud.net">no-reply@invoicecloud.net</a> to your safe senders list.</i></p> <p><u>To finalize your enrollment in AutoPay, you must click on the link below to verify that you have received this notification and accepted the terms and conditions associated with this service.</u></p> <p>Sincerely,</p> <p>Training - TEST</p>	<p><a href="#">Online Billing Terms and Conditions</a></p> <p><a href="#">Online Billing Privacy Policy</a></p>
<p><b>I have read and Agree to the AutoPay Terms and Conditions below.</b></p>	<p><b><u>Complete Registration</u></b></p>
<p><b><u>AutoPay Terms and Conditions</u></b>          You are authorizing an automatic deduction for the balance of your account with Training - TEST from your bank or credit card account as listed in your online billing account. For purposes of identification, billing and marketing, you declare that the information you have provided is current, accurate, and complete, including your legal name, address, telephone number(s), and that the payment account information belongs to you, and that any changes, or cancellation of Auto-Pay will be made strictly by you. You agree that you are solely responsible for maintaining the confidentiality of your password and account ID. You understand that:</p>	

- After clicking on the **Complete Registration** link in the email, the user will be directed to a confirmation page where they can login to the Customer Portal.

## AutoPay Registration Completed

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You have successfully completed the AutoPay Registration Confirmation process. You may close this window at any time and return to what you were doing.

[Sign In >](#)

- The Customer Portal dashboard appears showing the green check confirming the user's AutoPay sign up.

## Your Account at a glance

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**I want to...**

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[Pay my invoices >](#)

- [View my payment history >](#)
- [View my scheduled payment history >](#)
- [Manage my AutoPay settings >](#)
- [Manage my Paperless settings >](#)
- [Update my account information >](#)

[Recent Open Invoices >](#)

Due On	Invoice Date
7/25/2019	6/1/2019

[Recent Payments >](#)

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**Services**

AutoPay ✔

Paperless EDIT

Pay By Text EDIT

[Recent Closed Invoices >](#)

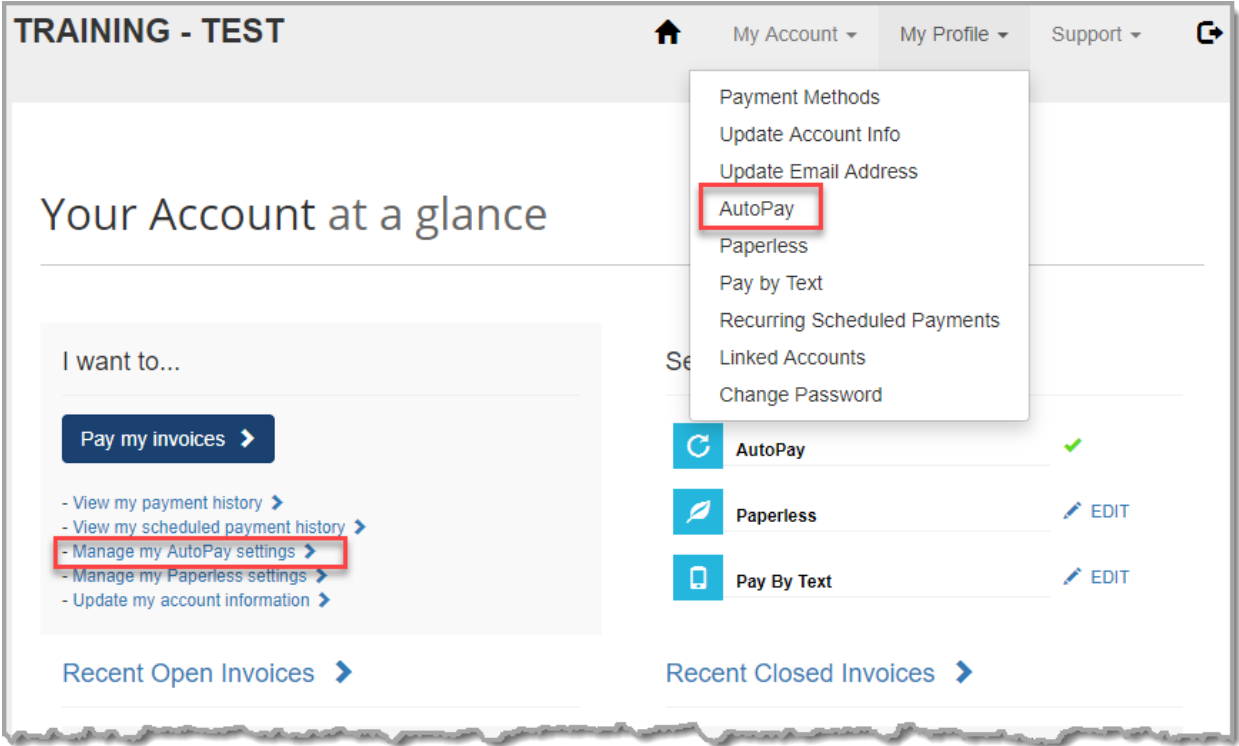
Invoice Date	Account #
4/12/2019	PP-04628

[Upcoming Scheduled Payments >](#)

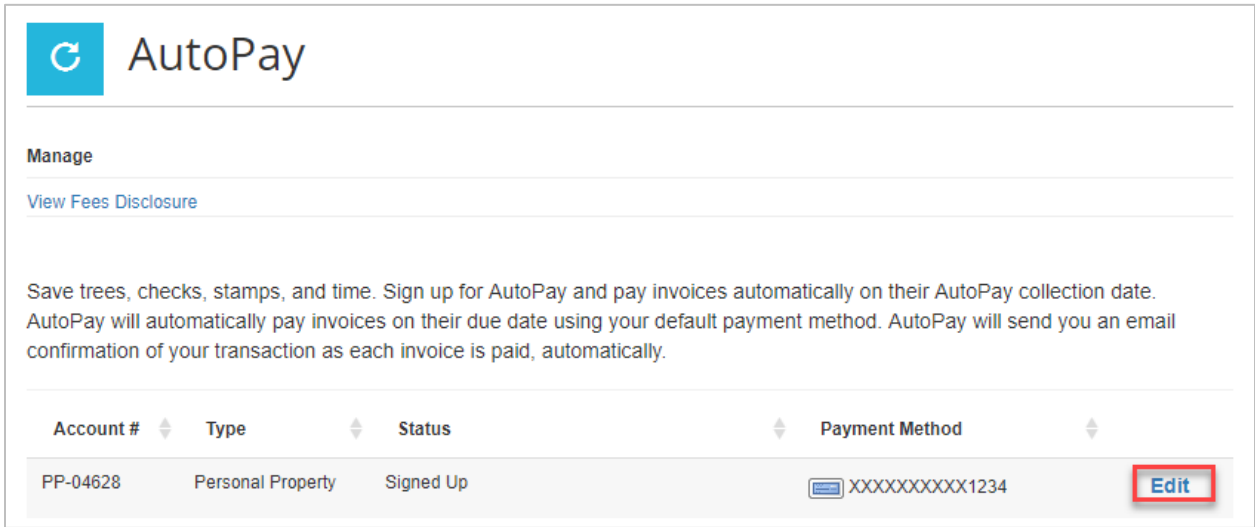
No history available

### Manage AutoPay Settings

1. From the Customer Portal dashboard, the user can select, **Manager my AutoPay settings** or select **AutoPay** from the **My Profile** menu at the top of the page.



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

### 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 \*** #PP-04628 - MALKIN ANDREW & **Invoice Type \*** Personal Property

**Use this payment method \*** My Bank Account: XXXXXXXXXXXX1234

**AutoPay Status \***

Yes, put me on AutoPay

No, I do not want AutoPay

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	
PP-04628	Personal Property	Not Signed Up	---	<a href="#">Edit</a>