# Setup (Auto pay)

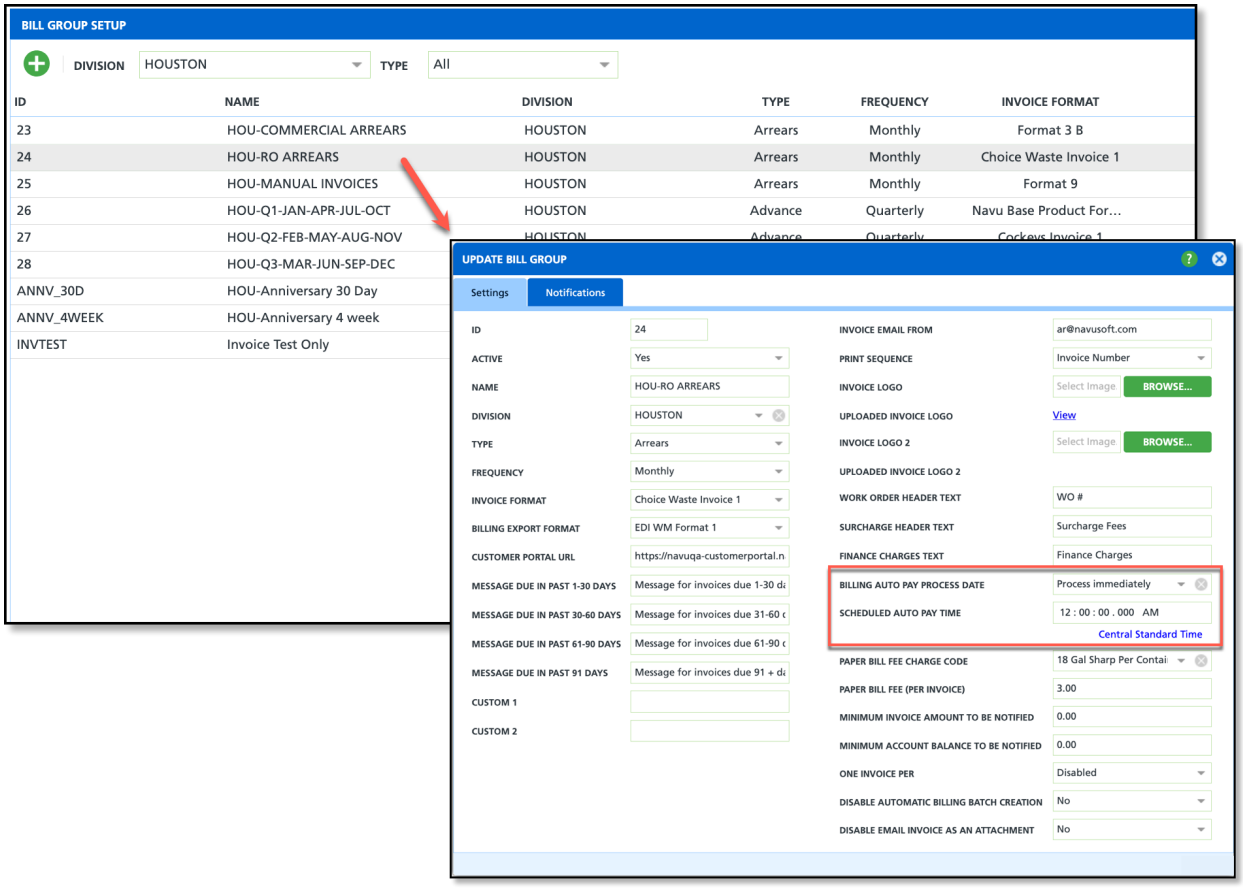
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The following article details the required setup components for customers to pay their invoices and account balances using the automatic payment system.

## Bill Group Setup

**Pathway:** *Setup > Accounting > Bill Group*

In the Settings tab for Bill Group Setup, review the *Billing Auto Pay Process Date* field and *Scheduled Auto Pay Time* field for the selected bill group. The Update Bill Group editor displays by double-clicking within the row of a Bill Group. Settings are Bill Group specific.




### Billing Auto Pay Process Date

Helps default the date for future-dated auto-pay batches during billing. Options include:*Process Immediately, Invoice Date, and 10 Days After Invoice Date.*

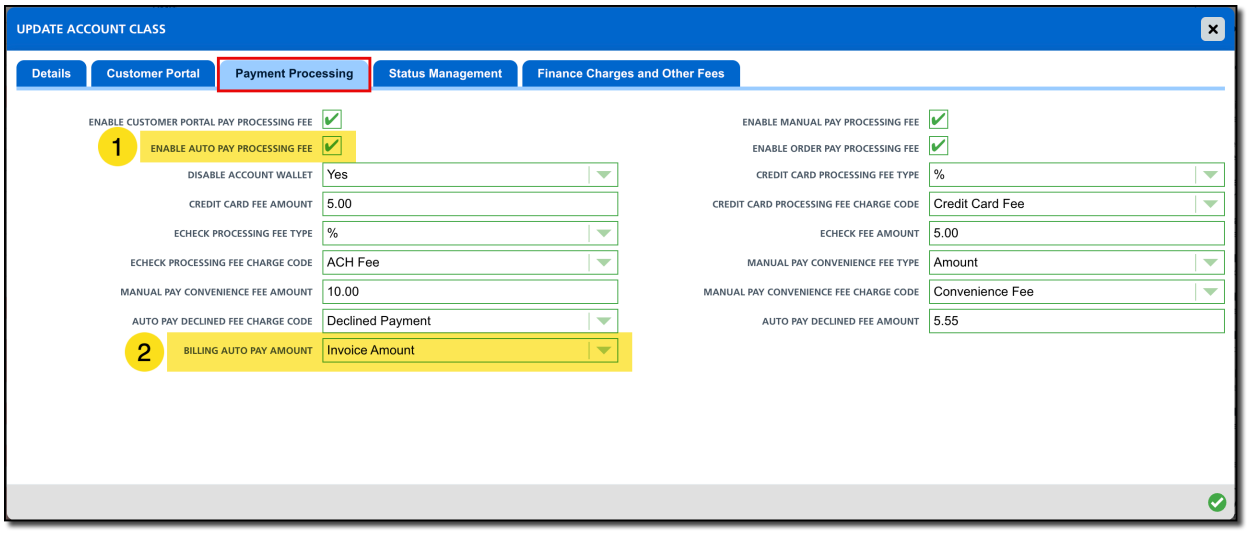
### Scheduled Auto Pay Time

Select a time to process account balance payments for the selected Bill Group. Payments will be processed daily at the selected time for accounts within the group. Recommendation: Select a time before 9:30 PM EST, as this is the settlement time for next day credit card payment funding through Cardpointe.

# Account Class Setup

**Pathway:** *Setup > Account > Account Class*

The Payment Processing tab in Account Class setup establishes the auto pay amount that will process for accounts in the selected account class. Settings here are account class specific.



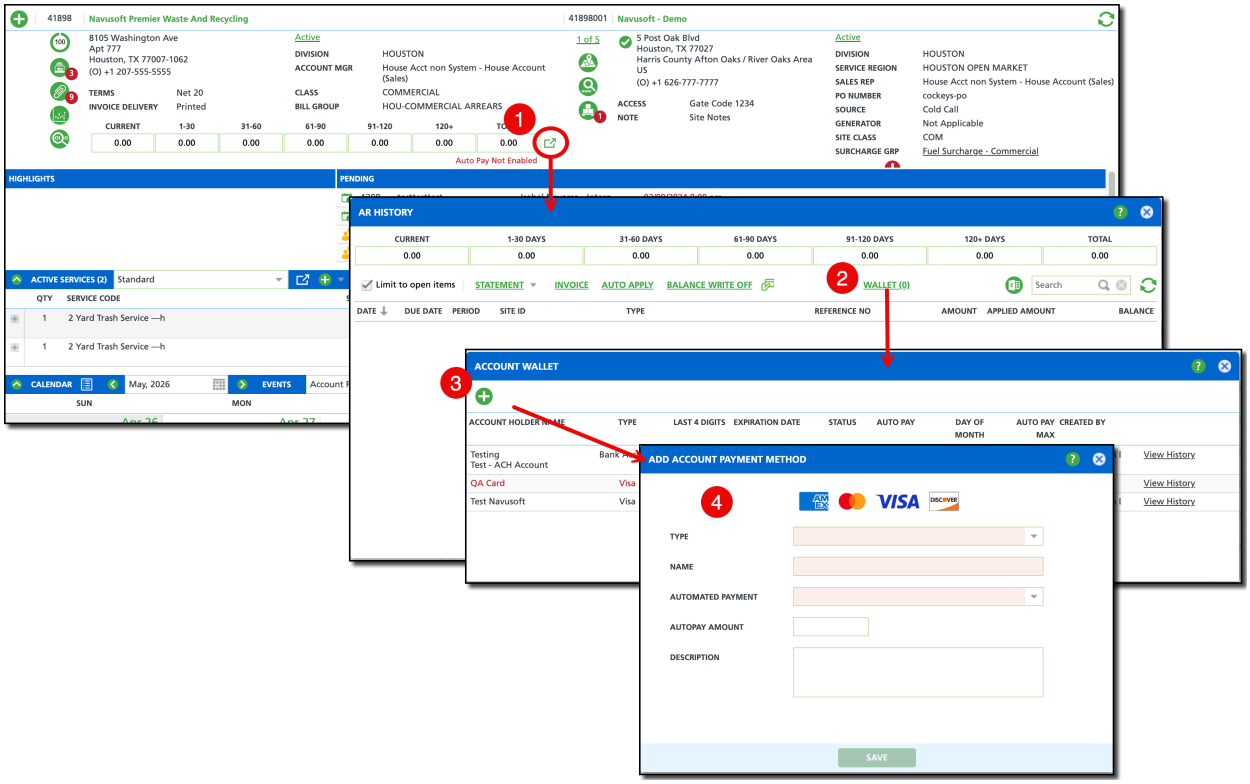

1. **Enable Auto Pay Processing Fee** - Select this box to apply a processing fee to customers using auto pay. Note: If selected, review fields: '*Credit Card Processing Fee Type* ' and '*ACH Processing Fee Type*' for additional fee setup.

2. **Billing Auto Pay Amount** - Select the amount to be paid:
    - Invoice Amount
    - Balance Due
        - Select this option and auto pay will process the total balance due on customer accounts.
        - This option will not be applied to accounts where **Bill By Site** is enabled and will instead default to the Invoice Amount.

# Account Setup

**Pathway:** *Accounts > Search > Customer Service Screen*

Add and manage a customer's auto-pay payment method using the AR History tool in their account. Only one active auto-pay payment method is allowed at a time.




1. Select the **AR History icon** from the Customer Account screen to display the AR History editor.
2. Select **'Wallet'** and the *Account Wallet* editor will display.
3. Add a new account payment method from the *Account Wallet*.
4. Select the payment **Type** from the drop down. Options include: Credit Card and Bank Account.
5. Complete all required fields for the selected payment type.
6. Click **Save** when finished.

## Related Articles

Bill Group Setup
Account Class Setup
AR History Overview