Setup (Auto pay)

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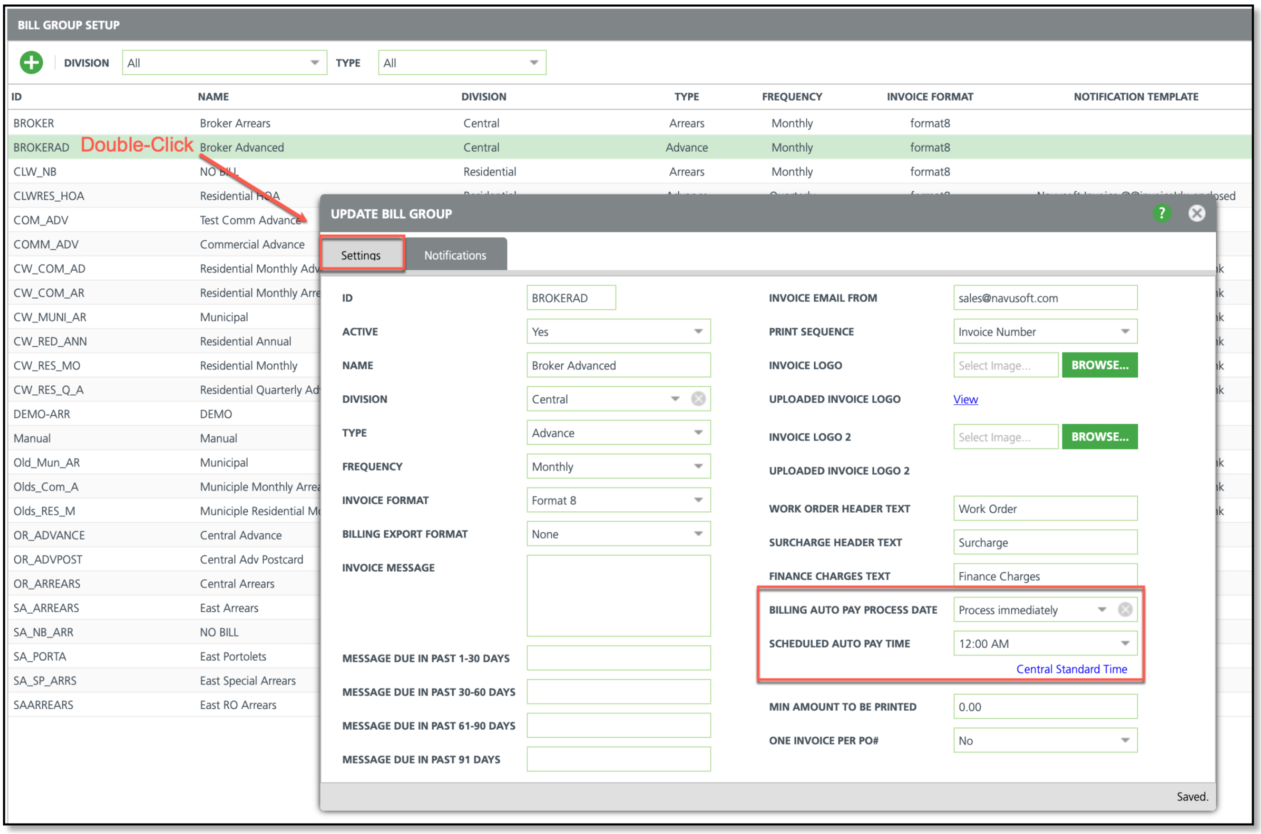
The following article details the required setup components for customers to pay their invoices and account balances using the automatic payment system.

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

Assists in defaulting date when future dating auto pay batch during billing.

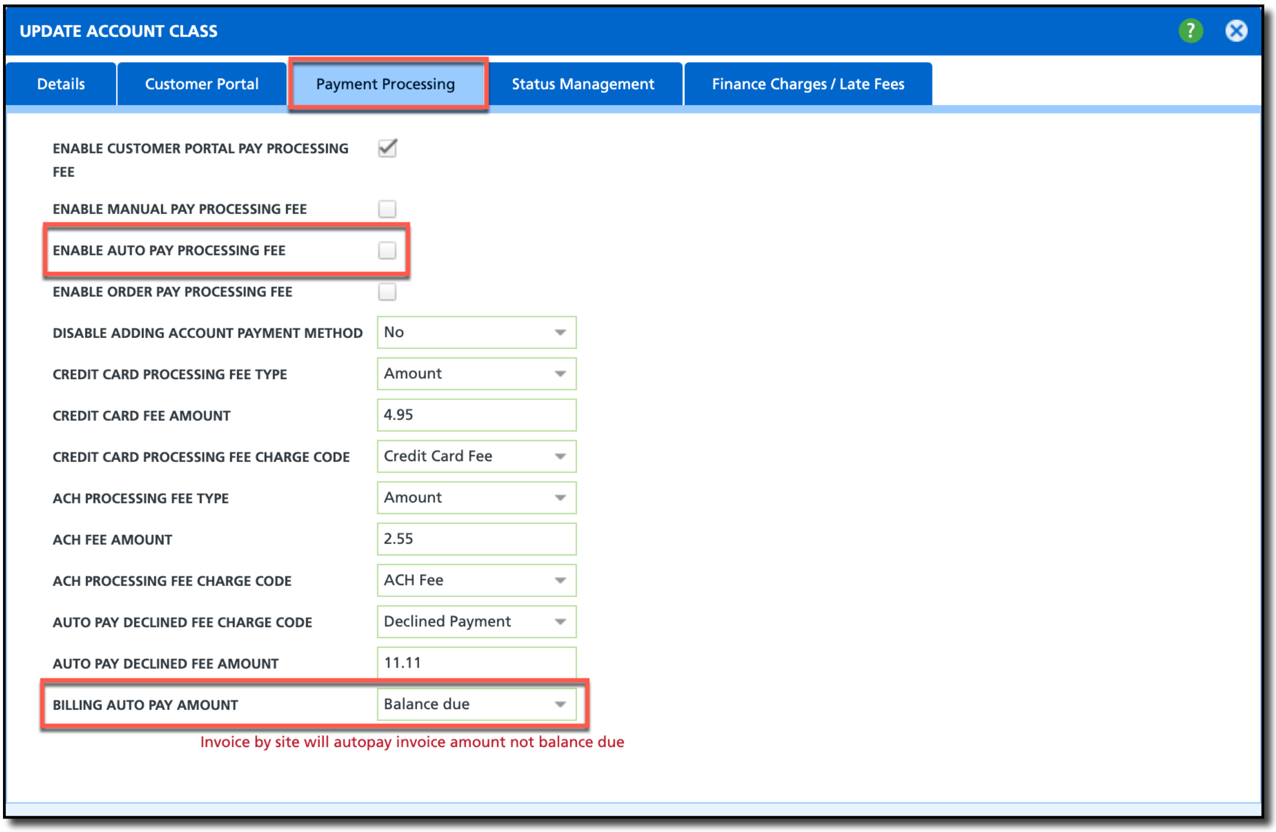
Scheduled Auto Pay Time

Select a time to process account balance payments for the selected Bill Group. Payments for accounts in the Bill Group will process daily at the selected time. Recommendation: Anytime before 9:30 pm EST. 9:30 pm EST is the settlement time for next day credit card payment funding through Pineapple Payments.

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. Selections here are Account Class specific.



Enable Auto Pay Processing Fee

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

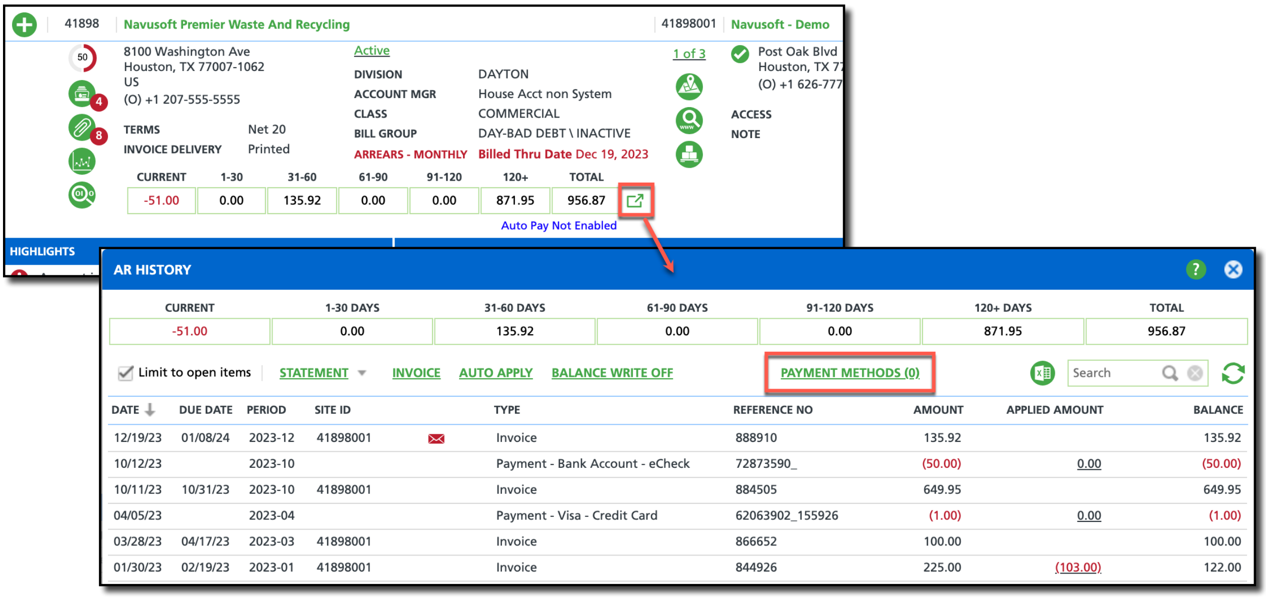
Billing Auto Pay Amount

1. Invoice Amount
    - Select this option to process only the current invoice amount for customers.
2. 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 Service Location' is enabled and will instead default to 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 customer account. Only one auto pay payment method can be active at a time.



1. Select the **AR History icon** from the Customer Account screen to display the AR History editor.
2. Select **'Credit Cards On File'** and the Account Payment Methods editor will display.
3. Select the **green '+' icon** to add a new account payment method from the Account Payment Methods screen.
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.