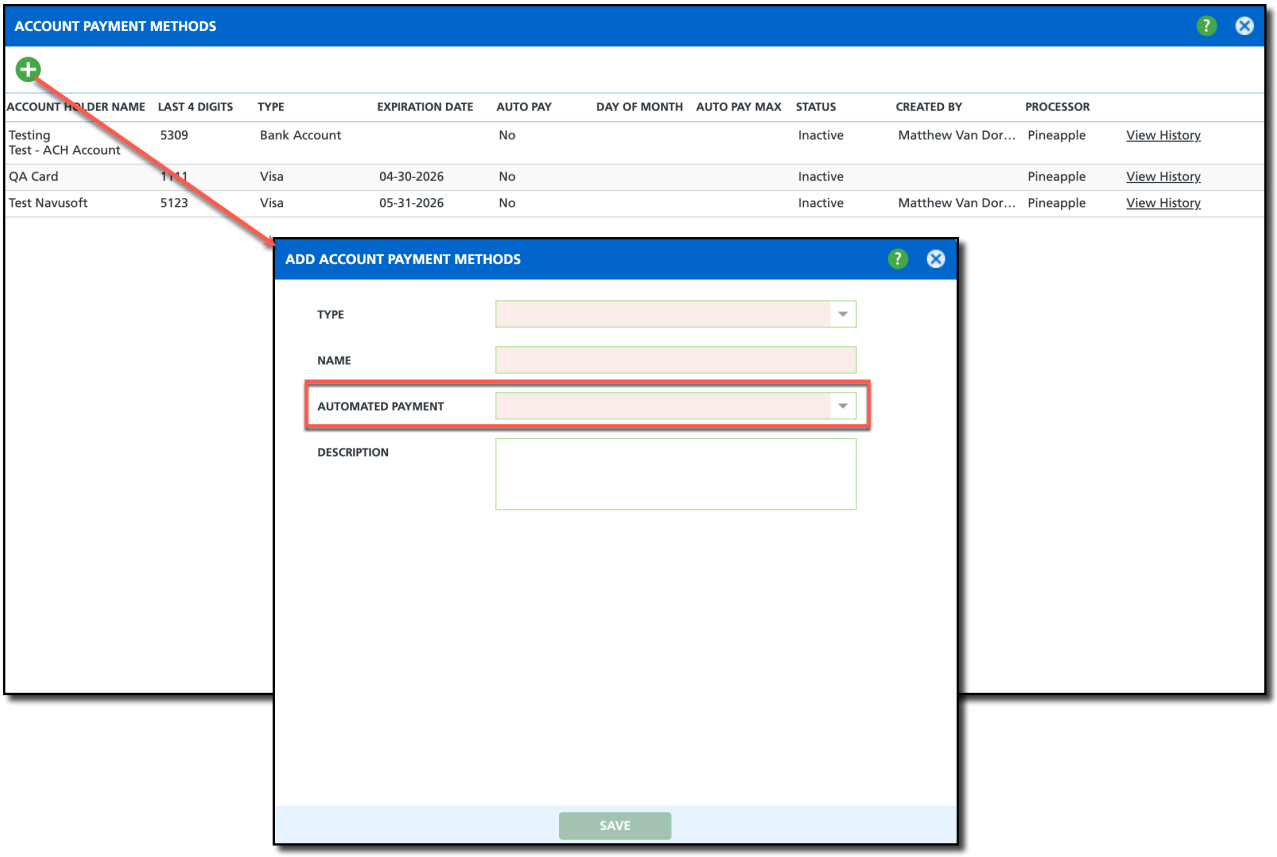
Auto Pay Setup

Last Modified on 06/29/2026 11:31 am PDT

Pathway: *Accounts > Search > Accounts > AR History*

The option to enable auto-pay for an account is linked to its payment method and is configured in AR History. Accounts with auto-pay can choose to have payments processed either at the same time as billing or on a specific day of their choice. If the Customer Portal is available, customers can be directed to set up their own Auto Pay through the "Manage Auto Pay" option. Otherwise, setup is done is AR History for the site.



Permissions

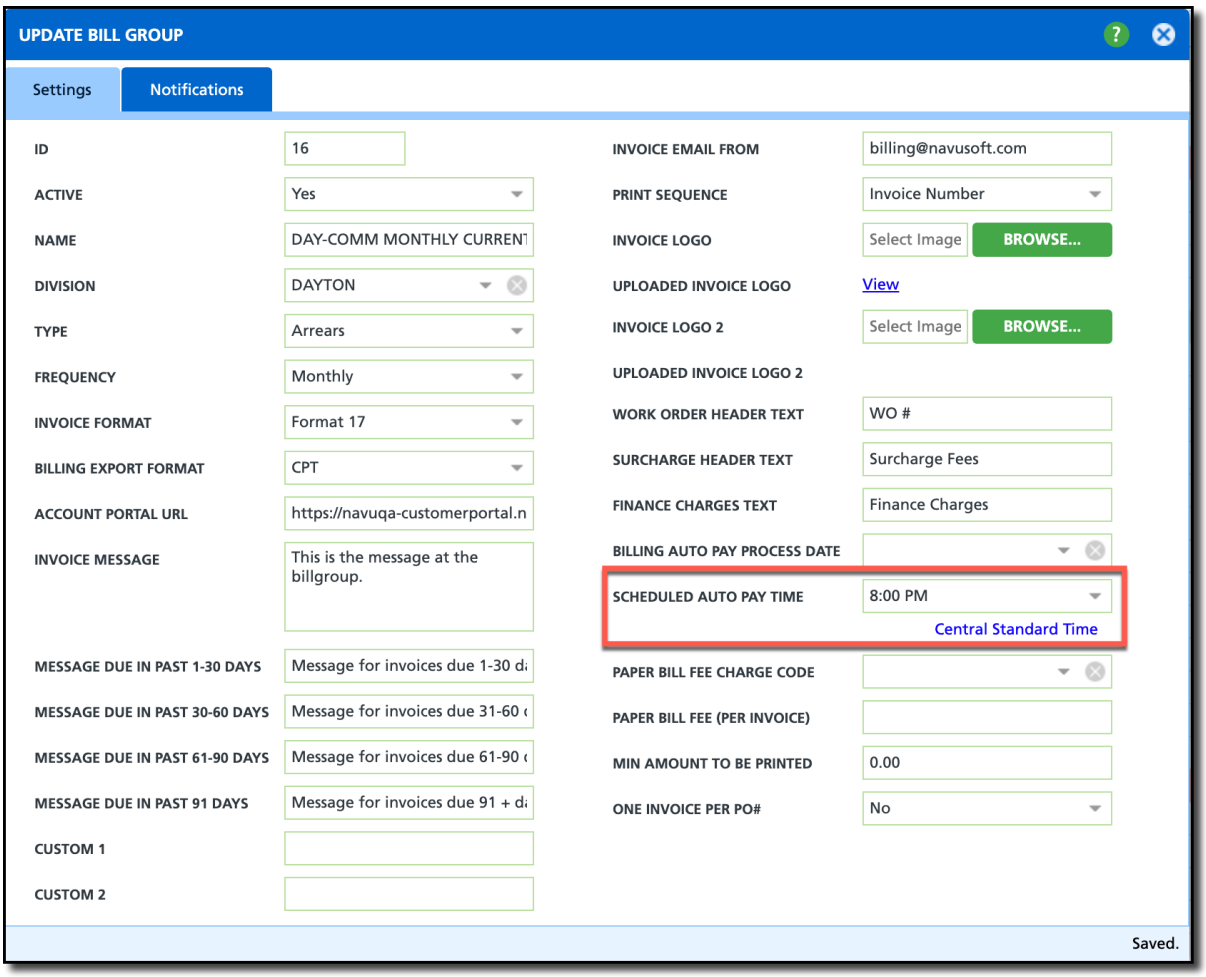
The following permissions are required to setup an account on auto-pay:

Permission ID	Permission Name
5	View Account
6	View Site
41	View AR History

Scheduled Auto Pay Time: Bill Group Setup

Pathway: *Setup > Accounting > Bill Group*

In a Bill Group's setup, the Scheduled Auto Pay Time field determines the processing time for scheduled day auto payments. The selected time specifies when Auto Pay will be processed each day.



Add Account Payment Method Field Descriptions

Some of the fields displayed here will change based on what the user selects from the **Type** and **Automated Payment** fields.

Field	Description
Type	Determines whether the payment method is a Credit Card or Bank Account. Fields specific to the type will display upon selection.
Automated Payment	The options for automated payment processing when adding/editing a payment method for the account include: • **No -** Select if the account should not follow auto pay setup. • **At Billing -** Select if payment should be auto processed when the account is billed. • **Scheduled Day -** Select to set a scheduled day each month for an account to be billed on.
Day Of Month	The specific day payment will be automatically processed for the account. Only displays when Automated Payment is set to 'Scheduled Day'.
AutoPay Amount	Indicates the maximum payment amount that auto pay will process.

Active	Indicates if the auto pay payment method is active for the account. To prevent auto pay processing, the autopay payment method can be deactivated if needed. However, when reactivated, it will collect the full balance due the next time auto pay is processed.
Description	Option to include an internal description for the payment method.

Set up Auto Pay for an Account

Auto Pay is set up in AR History through the Wallet hyperlink. Once there, the following steps apply:

1. Click the **green +** to open the **Add Account Payment Methods** tool or double click on an existing payment method to edit a current setup.
2. Select either 'Scheduled Day', or 'At Billing' from the **Automated Payment** field.
    - If Scheduled Day is selected, enter the **Day Of Month** for payment to be processed.
3. Enter the **AutoPay Amount** to be processed by auto pay.
4. Click **Save** when finished.