

Customer Portal - Manage Auto Pay

Last Modified on 04/17/2026 12:25 pm PDT

Pathway: [Customer Portal](#) > [Manage Automatic Payment](#)

From the Customer Portal, the **Manage Auto Pay** feature allows customers to activate and manage automatic payments themselves choosing when the payment is made and how it is paid.

SELECT ACCOUNT 1 of 10 **SELECT SERVICE LOCATION** 1 of 1

21638 BIG COUNTY 21638001 BIG COUNTY 12911 Farm to Market 777 East St, Houston TX

TEST MESSAGE TESTING

\$ 0.00 TOTAL DUE

\$ 0.00 PAST DUE

Make a Payment
Last Payment: 12-11-2023 - Visa
123456_DEMO_AUTH \$ 731.40

Invoice History

Manage Auto Pay
Automatic payment activated - 15th of each month (Visa 1111
Exp: 10/33)

Wallet

Reports / Documents (3)

CURRENT SERVICES	FREQUENCY	NEXT SCHEDULED
1 - 10 Yard Trash Service	On Call	
1 - Roll Off Rental Monthly	On Call	
1 - 4 Yard Trash Service	1x per week	Mon May 27th
1 - 2 Yard Recycle Service	On Call	
1 - 35 Yard Compactor Ser...	2x per week	Thu May 23rd
1 - 10 Yard Open Top Service	On Call	

[PRINT CALENDAR](#)

RECENT SERVICES	ID	SERVICE
Mon May 27, ...	7703715	4 Yard Trash Service
Mon Mar 25, ...	7403228 (Completed - Recycling Contaminated)	4 Yard Trash Service
Mon Feb 26, 2...	7259940 (Not Serviced - Bin Blocked)	4 Yard Trash Service
Mon Feb 5, 2024	7142482 (Not Serviced - Bin Overloaded)	4 Yard Trash Service

Manage Automatic Payments

Enable Automatic Payments: Scheduled Day

Wallet: George Cassidy - 1111 Expires 10-2023

Add Wallet

Day Of Month: 15

Save **Cancel**

Manage Automatic Payments Field Descriptions

Filter	Description
Enable Automatic Payments	Select from the following payment options: <ul style="list-style-type: none"> No - Automatic payments will NOT be enabled. Scheduled Day - Auto-pay will be processed on a set day each month identified in the 'Day of Month' field. At Billing - Auto-pay will be processed at the same time as billing.
Wallet	Choose an existing credit card or bank account payment method to be utilized for automatic payment processing.
Add Wallet	Option to add a new payment method for auto-pay to use if there is not an existing method available, or the payment method has changed.

Day Of Month	Identifies which day auto pay will process each month if 'Scheduled Day' is used.
Maximum Payment Amount	Option to enter a maximum payment amount that auto-pay can process.

Setup Requirements/Logic

- The account must be in an **Active** status.
- The Manage Auto Pay option is available only for the following Customer Portal Home Pages, which are defined in the Account Class:
 - Standard
 - AR Only
 - Mail Back
 - Service Map and Requests
 - MRF/Recycling
 - Calendar View
 - Brokered Account

To learn more about how to set up the customer portal with the correct Home Page so that the Manage Auto Pay is displayed in the customer portal, see [Customer Portal Views](#).

Enable Automatic Payments

1. Select '**Manage Auto Pay**' from the Customer Portal home screen to open the **Manage Automatic Payments** window.
2. Select an option from the '**Enable Automatic Payments**' drop down:
 - **Scheduled Day** - Auto-pay will be processed on a specific day each month identified by the customer.
 - **At Billing** - Auto-pay will be processed at the same time as billing.
3. Select an existing option from the **Wallet** drop down
To add a new form of payment, select **Add Wallet**. See instructions below.
4. If **Scheduled Day** was selected from the 'Enable Automatic Payments' drop down, enter the **Day of Month** auto-pay should process.
5. Optional, enter a **Maximum Payment Amount** that can be processed using auto-pay.

Note: This option must be configured during set up for it to display as shown here:

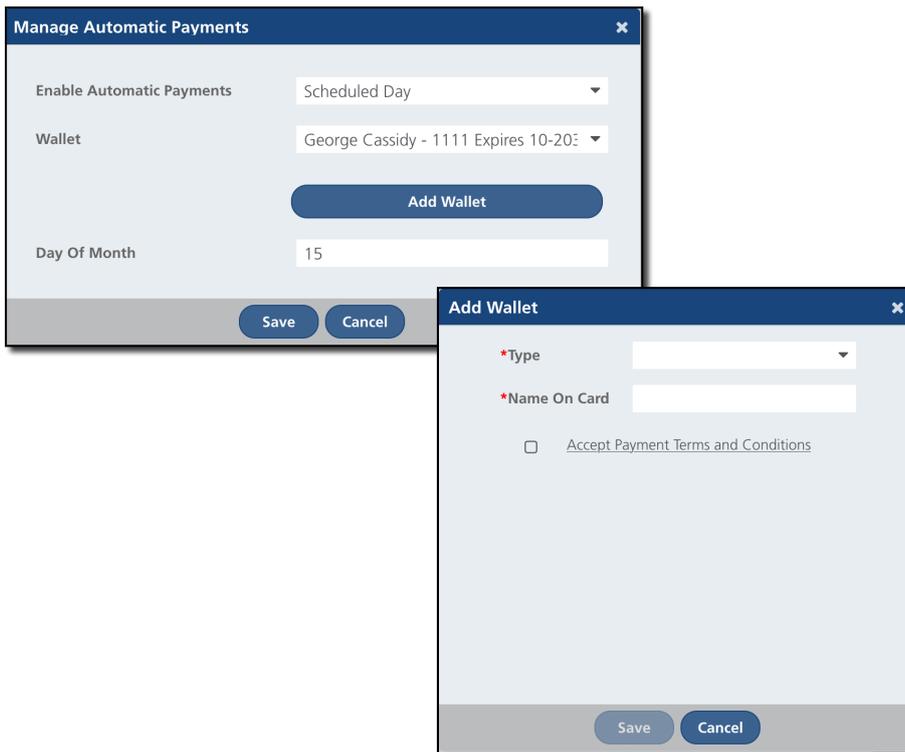
The screenshot shows the 'SYSTEM OPTIONS SETUP' interface with the 'Customer Portal' tab selected. The 'ENABLE AUTO PAY MAX AMOUNT' option is highlighted in yellow, indicating it is the focus of the setup. The interface includes various configuration options for the customer portal, such as 'CUSTOMER PORTAL URL', 'LOGIN MESSAGE(HTML)', 'LOGIN TERMS(HTML)', 'MAKE A PAYMENT TERMS', 'LOGIN LOGO', 'LOGIN LOGO URL', 'GRAPHICS STYLE (CSS)', and 'GRAPHICS STYLE URL'. The 'ENABLE AUTO PAY MAX AMOUNT' dropdown is currently set to 'Yes'.

6. Click '**Save**'.

Add Payment Method - Wallet

The Add Wallet tool is used to store credit card and bank information for automatic payment charges. More

information about Wallet and setup configurations can be reviewed here: [Customer Portal - Wallet](#)



1. Click the '**Add Wallet**' button from the Manage Automatic Payments screen. This will open the 'Add Wallet' popup.
2. Select the payment **Type**: Bank Account or Credit Card.
3. Enter the **Name** of the bank account or credit card holder.
4. Select the "**Accept Payment Terms and Conditions**" hyperlink to review the terms and conditions. Check the associated box to acknowledge and accept.
5. Click '**Save**' to add the payment method to Wallet.

Related Articles

[Make a Payment](#)

[Invoice History](#)

[Manage Payment Methods \(Wallet\)](#)

[Customer Portal Views](#)
