

Customer Portal - Manage Autopay

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

The Manage Automatic Payments screen allows users to activate automatic payments, choose the frequency and payment method, and input payment details.

The screenshot displays the 'Manage Autopay' interface. At the top, there are sections for 'SELECT ACCOUNT' (21638 BIG COUNTY) and 'SELECT SERVICE LOCATION' (21638001 BIG COUNTY 12911 Farm to Market 777 East St, Houston TX). Below this, the 'TEST MESSAGE TESTING' section shows '\$ 0.00 TOTAL DUE' and '\$ 0.00 PAST DUE'. A sidebar on the left contains navigation buttons: 'Make a Payment', 'Invoice History', 'Manage Auto Pay' (highlighted with a red box), 'Wallet', and 'Reports / Documents (3)'. The 'Manage Auto Pay' button has a sub-note: 'Automatic payment activated - 15th of each month (Visa 1111 Exp: 10/33)'. The main content area features a 'CURRENT SERVICES' table, a 'RECENT SERVICES' table, and a 'PRINT CALENDAR' link. An open modal window titled 'Manage Automatic Payments' contains the following fields: 'Enable Automatic Payments' (set to 'Scheduled Day'), 'Wallet' (set to 'George Cassidy - 1111 Expires 10-20:'), and 'Day Of Month' (set to '15'). There are 'Add Wallet', 'Save', and 'Cancel' buttons at the bottom of the modal.

Manage Automatic Payments Field Descriptions

Filter	Description
Enable Automatic Payments	Select from the following payment options to enable automatic payments: <ul style="list-style-type: none"> No - If selected, automatic payments will not be enabled. Scheduled Day - If selected, auto-pay will be processed on a set day each month identified in the 'Day of Month' field. At Billing - If selected, 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.

Enable Automatic Payments

1. Select '**Manage Auto Pay**' from the Customer Portal home screen to open the **Manage Automatic Payments** window.
2. From the '**Enable Automatic Payments**' drop down (Manage Automatic Payments screen), select one of the following options:
 - **Scheduled Day** - If selected, auto-pay will be processed on a specific day each month identified by the customer.
 - **At Billing** - If selected, auto-pay will be processed at the same time as billing.
3. Select an existing option from the **Wallet** drop down, or **Add a Wallet** if a new method should be added.
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.
6. Click '**Save**' when finished.

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](#)

The image shows two overlapping screenshots of a web application interface. The top screenshot is the 'Manage Automatic Payments' window, which has a dark blue header with a close button (X). It contains the following fields: 'Enable Automatic Payments' with a dropdown menu set to 'Scheduled Day'; 'Wallet' with a dropdown menu showing 'George Cassidy - 1111 Expires 10-20'; a blue 'Add Wallet' button; and 'Day Of Month' with a text input field containing '15'. At the bottom are 'Save' and 'Cancel' buttons. The bottom screenshot is the 'Add Wallet' window, also with a dark blue header and close button. It contains: '*Type' with a dropdown menu; '*Name On Card' with a text input field; and a checkbox labeled 'Accept Payment Terms and Conditions'. At the bottom are 'Save' and 'Cancel' buttons.

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.
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