

# Customer Portal - Manage Auto Pay

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**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.

The screenshot displays the 'Manage Auto Pay' 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 includes a table of 'CURRENT SERVICES' and a 'RECENT SERVICES' table. A modal window titled 'Manage Automatic Payments' is open, showing the following fields:

- Enable Automatic Payments:** A dropdown menu currently set to 'Scheduled Day'.
- Wallet:** A dropdown menu currently set to 'George Cassidy - 1111 Expires 10-20:3'.
- Day Of Month:** A text input field containing '15'.

Buttons for 'Add Wallet', 'Save', and 'Cancel' are also visible in the modal.

## Manage Automatic Payments Field Descriptions

Filter	Description
Enable Automatic Payments	Select from the following payment options: <ul style="list-style-type: none"> <li><b>No</b> - Automatic payments will NOT be enabled.</li> <li><b>Scheduled Day</b> - Auto-pay will be processed on a set day each month identified in the 'Day of Month' field.</li> <li><b>At Billing</b> - Auto-pay will be processed at the same time as billing.</li> </ul>
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.

<b>Day Of Month</b>	Identifies which day auto pay will process each month if 'Scheduled Day' is used.
<b>Maximum Payment Amount</b>	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, and its dropdown menu is set to 'Yes'. Other options include 'CUSTOMER PORTAL URL', 'DISPLAY SERVICE HISTORY', 'LOGIN MESSAGE(HTML)', 'LOGIN TERMS(HTML)', 'MAKE A PAYMENT TERMS', 'LOGIN LOGO', 'LOGIN LOGO URL', 'GRAPHICS STYLE (CSS)', and 'GRAPHICS STYLE URL'. The interface includes various input fields, dropdown menus, and buttons like 'BROWSE...', 'UPLOAD', 'EDIT', and 'DOWNLOAD'.

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](#)

The image shows two overlapping screenshots of a web application interface. The top screenshot is titled "Manage Automatic Payments" and contains the following fields: "Enable Automatic Payments" with a dropdown menu set to "Scheduled Day", "Wallet" with a dropdown menu set to "George Cassidy - 1111 Expires 10-20:", and "Day Of Month" with a text input field containing "15". There is an "Add Wallet" button below the "Wallet" field and "Save" and "Cancel" buttons at the bottom. The bottom screenshot is titled "Add Wallet" and contains the following fields: "\*Type" with a dropdown menu, "\*Name On Card" with a text input field, and a checkbox labeled "Accept Payment Terms and Conditions" with a hyperlink. There are "Save" and "Cancel" buttons at the bottom.

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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## Related Articles

[Make a Payment](#)

[Invoice History](#)

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

[Customer Portal Views](#)

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