Setting up Organization AutoPay

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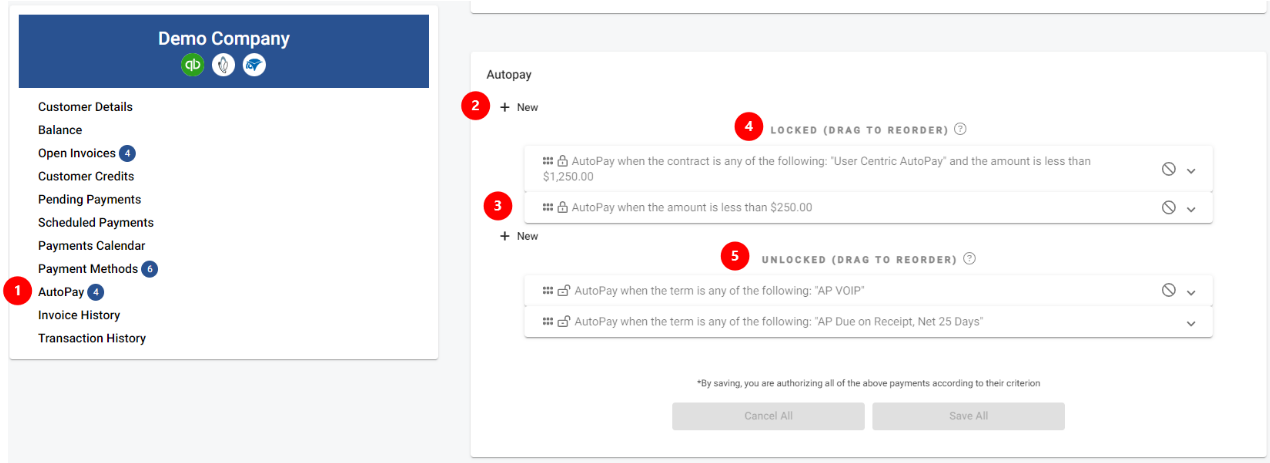
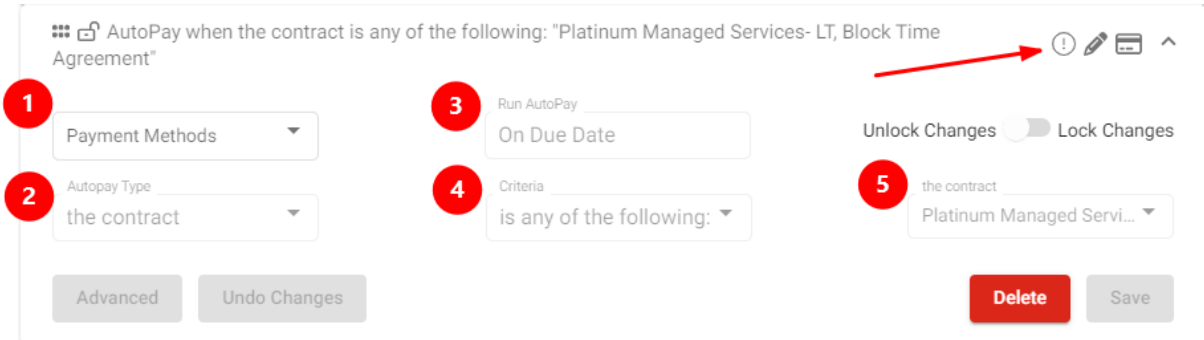
Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm



1. The Autopay section of the Organization Profile is where you may add/remove or modify settings for a given client.
2. To add a new configuration, click "**New**". The warning/attention symbol indicates when one or more settings are invalid or missing. This prevents the ability to save until all conditions are met.



   1. Choose a payment method to use (*exclusively for this configuration*)
   2. Select a basic trigger between active fields
   3. Select the Run AutoPay date. This could be days before or after the due date, days after the invoice date, or on a specific day of the month (this looks to the invoice date **NOT** the due date).
   4. Define criteria for the AutoPay rule
   5. Define the final value to validate against (may choose multiple)
   6. Save the changes!!
      - In the example image above, the save button is disabled because a payment method is not selected.

3. The order of operations/precedence can be changed by dragging and moving individual settings.
    - The top of the list is the first setting to process on an AutoPay cycle.
    - The cycle continues downward through remaining configurations in order, one-by-one.
4. You can stop existing settings from changing in a "freeze" "un-freeze" fashion. "Locking" (solid padlock icon) prevents the client from making *any* modifications, even if they have user permissions to do so.
    - Click the icon, or expand a setting to use the selector switch
        - Locked settings will show as "greyed out" and disabled from the client's perspective

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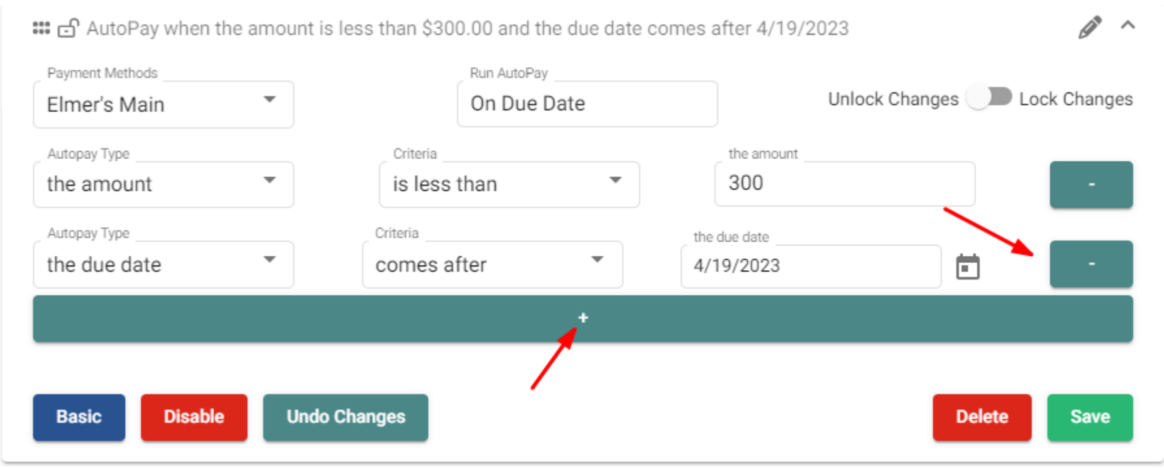
The "Advanced" option will allow you to add an additional row of criteria by clicking the green +. Doing so also enables additional "Types" as a potential trigger.

- You may click "DISABLE" to freeze the configuration without having to delete and start over.
- While you may create extremely complex scenarios, we recommend keeping the configurations as simple or "one-lined" as possible.
    - NOTE: ***ALL*** of the multi-line criteria must be met and hold true for a configuration to be honored so invoices pay.
    - In the example below: An invoice that is $280 and the due date is set to 4/17 would **NOT** autopay through the system as the defined criteria has not been met.



***It is entirely possible to trump, or invalidate a setting with another configuration*.**

- Ex., an invoice meets the criteria of multiple existing AutoPay configurations.
    - In that scenario, the system will **NOT** make a duplicate payment against the same invoice. The AutoPay cycle will simply "ignore" any remaining (but still true) configurations.