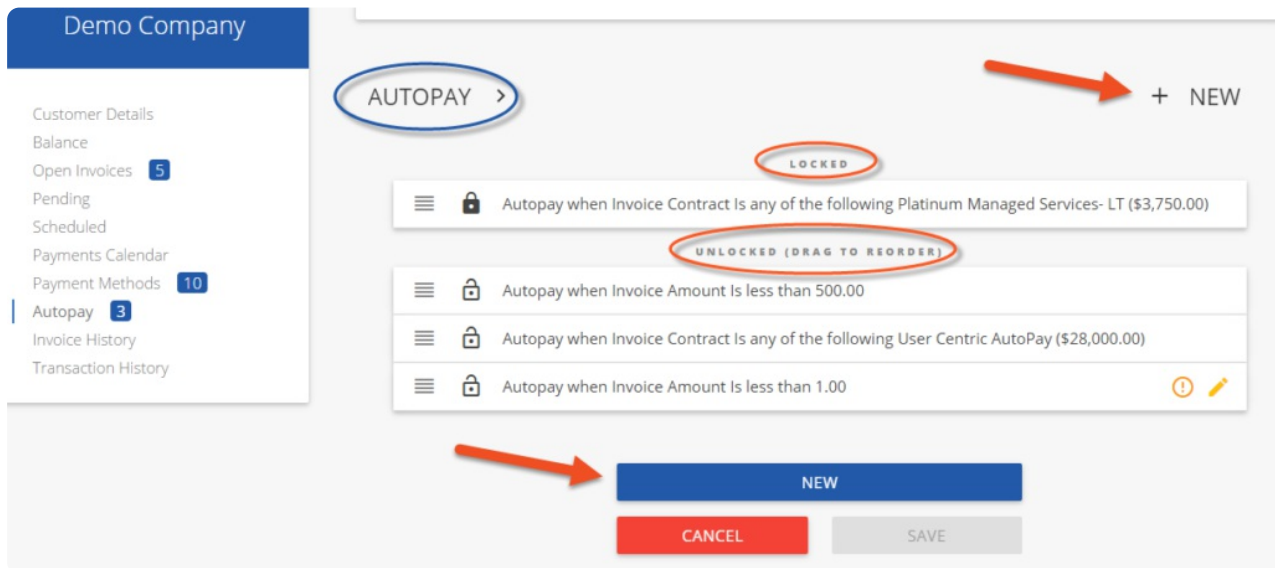


AutoPay

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The Autopay section of the Customer Profile is where you may add/remove or modify settings, for a given client.



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

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.

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 contract, dollar amount, or invoice line item name
 3. Pick an Operator as a condition
 4. Define the final value to validate against (may choose multiple)
 5. Save the changes!!
- In the example image below, the save button is disabled because a payment method is not selected in the 1st step.

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 ~ if a \$280 invoice was 10 days old, it would **NOT** AutoPay (the criteria is not met). If the invoice becomes 15 days old, the criteria

would be true and the system would make the payment.

Autopay when Invoice Amount Is less than 300.00 and Days Past Due Is more than 14.00

Payment Methods: My Visa

Unlock Changes: Lock Changes:

Autopay Type	Operator	Value	
Amount	Less Than	300	X
Days Past Due	Greater Than	14	X

+ (circled in blue)

BASIC DISABLE DELETE UNDO CHANGES

***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.