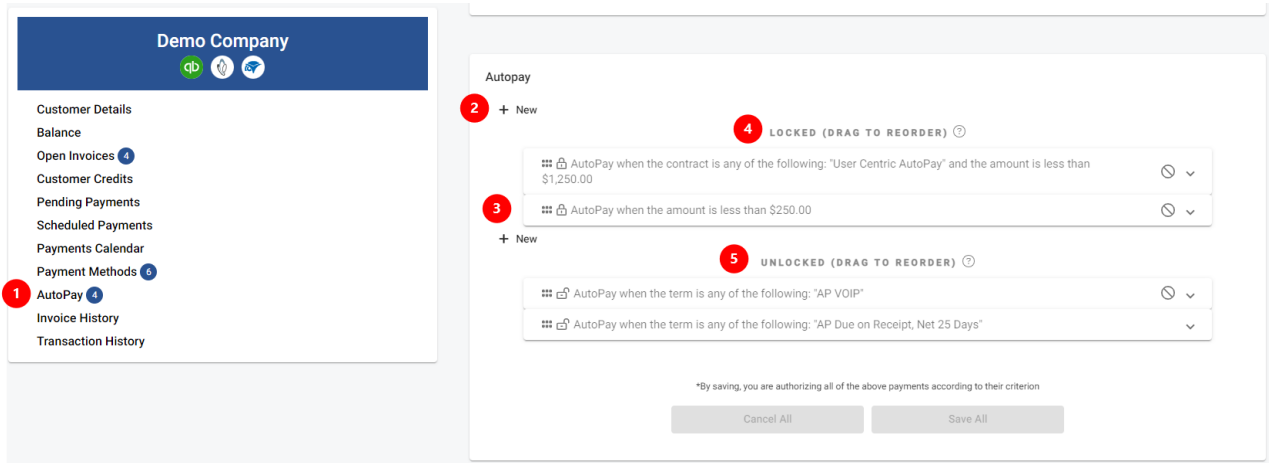


Setting up Organization AutoPay

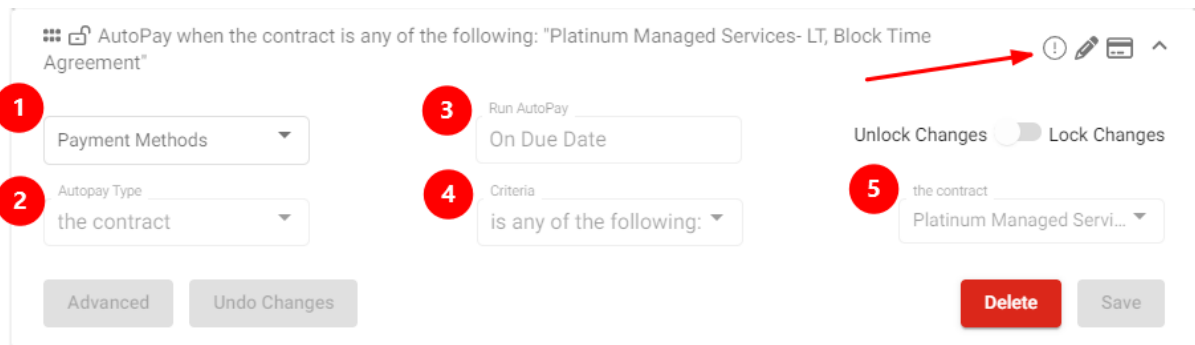
Last Modified on 02/02/2024 11:14 am CST

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

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.

The screenshot shows the configuration for an AutoPay rule. The title is "AutoPay when the amount is less than \$300.00 and the due date comes after 4/19/2023". The interface includes several controls: "Payment Methods" set to "Elmer's Main", "Run AutoPay" set to "On Due Date", and a toggle for "Unlock Changes" (currently off). There are two criteria rows. The first row has "Autopay Type" set to "the amount", "Criteria" set to "is less than", and a value of "300". The second row has "Autopay Type" set to "the due date", "Criteria" set to "comes after", and a value of "4/19/2023". A green bar with a plus sign (+) is visible below the criteria rows, indicating where to click to add a new row. At the bottom, there are buttons for "Basic", "Disable", "Undo Changes", "Delete", and "Save".

***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.