

# Auto-Pay Overview

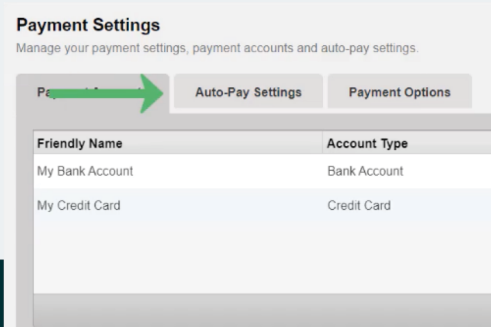
Auto-Pay was developed to offer a convenient and automatic way for Accounts Payable departments to pay their invoices, alleviating the stress associated with late payments.

## Instructions

1

To set up your rules go to the **Auto-Pay Settings** tab on the Payment Settings screen.

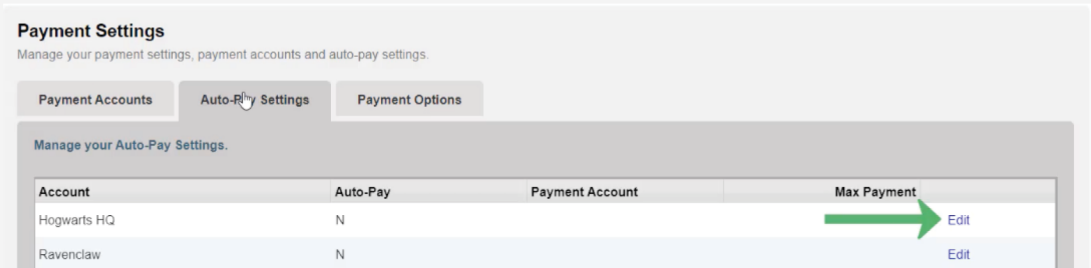
- A** You'll see one Auto-Pay rule for each account on your online portal login.
- B** By default, Auto-Pay is disabled.



2

Enable Auto-Pay by clicking the **Edit** button next to the account you wish to enable.

- A** Once in this menu, you can switch from disabled to enabled.



3

## Next set up the Auto-Pay rule.

A

Auto-Pay requires you to set the account to one of your bank accounts or credit cards.

B

Set the Maximum Payment threshold to determine when the system should use the Auto-Pay rule.

The screenshot shows the 'Payment Settings' interface with the 'Auto-Pay Settings' tab selected. The form includes the following elements:

- Payment Settings** header with a subtext: 'Manage your payment settings, payment accounts and auto-pay settings.'
- Three tabs: 'Payment Accounts', 'Auto-Pay Settings' (active), and 'Payment Options'.
- Section: 'Manage your Auto-Pay Settings.'
- Auto-Payment:** A dropdown menu currently set to 'Enabled'.
- Payment Account:** A dropdown menu currently set to 'No Account Selected'.
- Maximum Payment:** A text input field containing '0.00'.
- ☐ I have reviewed and agree to the [Terms and Conditions](#)
- Two yellow buttons at the bottom: 'Cancel' and 'Save'.
- A tooltip on the right side of the 'Maximum Payment' field states: 'Any bills less than the maximum will be paid automatically. Larger bills will need to be paid manually.'

4

## Almost there

Confirm that you have **reviewed and agree to the Terms and Conditions** by checking the box. You can click on the terms and conditions text if you would like to read through them first.

5

Once you've finished, press the **Save** button to confirm your changes.

**Save**



## You're all set

You should be able to see that the **Auto-Pay** is now **enabled**. It will take effect on your next billing cycle.

Any new invoices that meet the criteria will automatically have your Auto-Pay rules applied. But any existing invoices will be unpaid, even if they meet the criteria.

## We're here to help

If you have questions or need additional support, contact us at

**Thank you.**