

SETUP AUTOPAY

Click on the AUTOPAY menu option:

- Click “NEW”, and expand to reveal the available options
- Configure your preferences in 5 steps, as per the example image below
 - Note: You can have more than one “AutoPay” Rule/Condition at a time!
 - With the below “less than \$” example, “one-off” type invoices can also be paid automatically!

The screenshot shows the 'AutoPay' menu option circled in blue in the top navigation bar. Below it, a rule configuration card is displayed with the following details:

- Rule Title: AutoPay when Invoice Contract Is any of the following Platinum Managed Plan (\$2,750.00)
- Payment Methods: 1 Wild Eagle Checking
- Run AutoPay: 2 On Due Date
- Autopay Type: 3 Contract
- Contract: 4 Platinum Managed Plan (\$2,750.00)

Buttons at the bottom of the card include ADVANCED, DELETE, and UNDO CHANGES. Below the card, a second rule is partially visible: 'AutoPay when Invoice Amount Is less than 1000.00'. At the bottom of the screen, a blue 'NEW' button is highlighted with an orange arrow, and a red 'CANCEL' button and a blue 'SAVE' button are also visible. A green box with the number '5' is next to the 'SAVE' button. A disclaimer reads: '*By saving, you are authorizing all of the above payments according to their criterion.'

- 1 - Select the payment method you want this rule to follow
- 2 - “On Due Date” will pay invoices matching the criteria on the date they are due (not created)
- 3 - Select “Contract” or “Amount”
- 4 - Pick the recurring service agreement you would like to be auto-paid
- 5 - Save your changes!