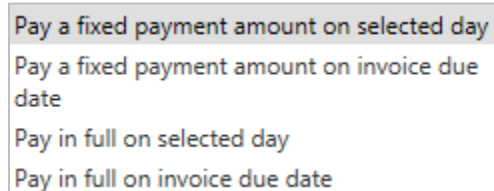


Recurring Scheduled Payments

Recurring Scheduled Payments is a feature that allows a payer to set up a scheduled payment for a designated amount on a designated date. Once the payer sets this up, our system will initiate the future payments based on the criteria the payer entered in the customer portal. The recurring scheduled payment can be scheduled for a specific day of the month, or when the Invoice is due. The payer can choose a specific payment amount, or have our system automatically pay the balance due on the day the transaction should occur. Recurring scheduled payments are tracked by Invoice Cloud. On a daily basis, our system will review the configurations and adjust the balances or dates as needed.

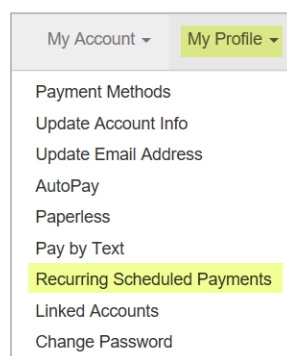
There are 4 recurring schedule payment types to choose from:



Options:

1. **Pay a fixed payment amount on a selected day:** Payer chooses the amount to pay and the date. Please note that this will occur even if the payer has already made a payment. Payer can set up multiple options.
2. **Pay a fixed payment amount on invoice due date:** Payer chooses the amount to pay on the invoice due date. Please note that this will occur even if the payer has already made a payment.
3. **Pay in full on selected day:** Payer chooses the date and the invoice due amount is paid automatically. Please note that if there is a zero-balance due on the designated date this payment will NOT process.
4. **Pay in full on invoice due date:** The invoice due amount is collected automatically on the invoice due date. Please note that if there is a zero-balance due on the invoice due date this payment will NOT process.

Customer Portal - If this feature is turned ON, there will be a menu option Recurring Scheduled Payments under My Profile.



Clicking on Recurring Scheduled Payments will take the payer to the Recurring Scheduled Payments screen. On the Recurring Scheduled Payments screen, the payer is able to create a New Recurring Scheduled Payment, edit or cancel an existing recurring scheduled payment.

Recurring Scheduled Payments

Manage

[+ New Recurring Scheduled Payment](#)
[View Fees Disclosure](#)

Our Recurring Scheduled Payments feature allows you to schedule a monthly payment once and then forget about it. [Click to learn more about this feature.](#)

Date/Time Added (CST)	Description	
7/3/2018 10:44 AM	Pay \$100.00 on the 15th of each month Account #PP-18443	Edit Cancel

The Description column displays a simple description of what that recurring scheduled payment will do. In this case this record will “Pay \$100.00 on the 15th of each month”.

Clicking on New Recurring Scheduled Payment will display the screen to set up a new recurring scheduled payment.

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New Recurring Scheduled Payment

Please select the type of Recurring Scheduled Payment you want to create and fill out all fields. [Click to learn more.](#)

<p>Select an Account *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> #87532087 - DANFORTH DENATL, PC ▼ </div>	<p>Invoice Type *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Personal Property ▼ </div>
<p>I want to *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Pay a fixed payment amount on selected day ▼ </div>	<p>How much do you wish to pay? *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> \$ \$0.00 </div>
<p>Pay on this day of every month: *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 1 ▼ </div>	<p>Use this payment method: *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Credit Card: XXXXXXXXXXXXXXX1111 ▼ </div>

Active *

✓ Save my changes

Standard service fees may be applied if applicable. Please view our [Fees Disclosure](#) for more information.

1. **Select an Account:** Displays the list of linked accounts associated with this user. If there is no other linked account, this drop down will not display.
2. **Invoice Type:** This is a 'by invoice type' feature, so this drop down displays only those invoice types that support this feature.
3. **I want to:** Displays the 4 recurring payment options.
4. **How much do you wish to pay:** This field will only display for the 2 recurring options that designate paying a fixed amount.
5. **Pay on this day of every month:** This field will appear for the 2 recurring options that designate the payment on a selected day.
6. **Use this payment method:** Displays the list of payment methods saved to the payer's profile. If the payer does not have a payment method saved to their profile the following screen will appear.


Recurring Scheduled Payments

Manage

[View Fees Disclosure](#)

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Please add a new Payment Method before signing up for a new recurring scheduled payment by clicking here.



You do not have any saved Recurring Scheduled Payments.

You may create a new Recurring Scheduled Payment by clicking [here](#).

- Active:** The active box is checked by default. The payer may choose to deactivate a recurring scheduled payment at any time. This action suspends the recurring payment until the box is checked at a future date.

IMPORTANT: After adding a recurring scheduled payment our system will automatically look at the invoices for this Payer, for the selected type, and will attempt to schedule payments up to 30 days out, based on the recurring payment configuration. This recurring schedule payment can be viewed in various reports in our portals.

Edit or Cancel Recurring Scheduled Payments

A Payer can view their upcoming scheduled payments using the standard View Scheduled Payments screen in the Customer Portal.




Your Accounts at a glance

I want to...

[Pay my invoices >](#)

- [- View my payment history >](#)
- [- View my scheduled payment history >](#)
- [- Manage my AutoPay settings >](#)
- [- Manage my Paperless settings >](#)
- [- Update my account information >](#)

Services

	AutoPay	EDIT
	Paperless	EDIT
	Pay By Text	EDIT

In the example below, the options are for a standard scheduled payment and two recurring scheduled payments. The recurring scheduled payments cancel option is disabled. If the Payer needs to edit or cancel a recurring scheduled payment, this must be done through the Recurring Scheduled Payments menu option.

Payment Date	Summary	Payment Amount	
7/6/2018	Scheduled Payment Invoice #2016080018443-1 Invoice is due on 11/1/2017	\$155.41	Cancel Scheduled Payment Change Scheduled Date
7/16/2018	Recurring Scheduled Payment Invoice #2016080011784-1 Invoice is due on 11/1/2017	\$100.00	View Recurring Settings
8/2/2018	Recurring Scheduled Payment Invoice #2016080011784-1 Invoice is due on 11/1/2017	\$100.00	View Recurring Settings

Edit Screen

All fields on this screen can be edited.

Recurring Scheduled Payments

Manage

[+ New Recurring Scheduled Payment](#)
[View Fees Disclosure](#)

Our Recurring Scheduled Payments feature allows you to schedule a monthly payment once and then forget about it. [Click to learn more about this feature.](#)

Date/Time Added (CST)	Description	
5/10/2018 10:46 AM	Pay \$100.00 on the 16th of each month Account #11784	Edit Cancel
5/10/2018 10:46 AM	Pay \$100.00 on the 2nd of each month Account #11784	Edit Cancel

Cancel Recurring Scheduled Payment - Click on the cancel option to the right of the scheduled payment. The following screen will display. Select the red box to confirm the cancellation.

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Cancel Recurring Scheduled Payment

Are you sure you would like to cancel this Recurring Scheduled Payment?

Please confirm your selection below.

When a payer attempts to edit a recurring scheduled payment and the original payment method no longer exists in our system, the selected account field will display the default message: Please select a Payment Method. A new payment method must be selected. The payer will be unable to save the edit until a new method of payment is saved.

Edit Recurring Scheduled Payment

Please select the type of Recurring Scheduled Payment you want to create and fill out all fields. [Click to learn more.](#)

Select an Account * #11784 - STUDEBAKER KRISTOPHER & ▾	Invoice Type * Real Estate ▾
I want to * Pay a fixed payment amount on selected day ▾	How much do you wish to pay? * \$ 100
Pay on this day of every month: * 16 ▾	Use this payment method: * Please select a Payment Method ▾

Active *

Standard service fees may be applied if applicable. Please view our [Fees Disclosure](#) for more information.

Managing Recurring Scheduled Payments in the Biller Portal

Managing a payer's recurring scheduled payments are handled in the Customer Profile. Access the tab labeled 'Recurring Scheduled Payments'. This will display if any invoice types support this feature. The options to create, edit or cancel a new recurring scheduled payment are available in this tab.

Please review your profile. Click update to save any modifications.

Customer Info Options History Bank Accounts Credit Cards AutoPay **Recurring Scheduled Payments** Paperless

Email History Customer Accounts Pay By Text Customer Activity Outbound IVR History

NEW RECURRING SCHEDULED PAYMENT

Acct #	Inv Type	Description	Active	Options
11784	Real Estate	Pay \$100.00 on the 16th of each month	<input checked="" type="checkbox"/>	Edit Delete
11784	Real Estate	Pay \$100.00 on the 2nd of each month	<input checked="" type="checkbox"/>	

There are two reports available that will show recurring scheduled payments. These reports can be accessed from the Reports menu by selecting Payments and the desired report.

Reports Reconciliation Products Support

- AutoPay
- Custom Reporting >
- Customers >
- Email >
- Invoices >
- Paperless >
- Payments >**
 - Daily Payments Received
 - Monthly Summary
 - Recurring Scheduled Payments**
 - Registration
 - View Scheduled Payments**

The *Scheduled Payments* report will display any recurring scheduled or one-time scheduled payments that are occurring within the next 30 days.

Scheduled Payments ☆

Output Options

Row Limit	Availability	Retrieval
<input checked="" type="radio"/> 250 rows	Immediate	Screen
<input type="radio"/> All rows	Scheduled	Download

Submit ✓

Type	Pmt Type	Pmt Date	Acct #	Customer	Amt Due	Pmt Amt	Options
Scheduled	Credit Card	7/6/2018	PP-18443	CLARKE MATTHEW J & JESSICA L	\$0.00	\$155.41	
Recurring	Credit Card	7/15/2018	12345	MIRSKY EUDIS A & HOWARD M TRS	\$125.00	\$102.95	
Recurring	EFT (Check)	7/15/2018	PP-08164	BAKER MARITA	\$281.52	\$100.40	
Recurring	Credit Card	7/16/2018	11784	STUDEBAKER KRISTOPHER &	\$0.00	\$100.00	
Recurring	Credit Card	8/1/2018	12345	MIRSKY EUDIS A & HOWARD M TRS	\$125.00	\$102.95	
Recurring	EFT (Check)	8/1/2018	PP-08164	BAKER MARITA	\$281.52	\$100.40	
Recurring	Credit Card	8/2/2018	11784	STUDEBAKER KRISTOPHER &	\$0.00	\$100.00	

The *Recurring Scheduled Payments* report displays Recurring Scheduled Payments that have occurred in the past.

Recurring Scheduled Payments Report ☆

Start Date:

End Date:

Invoice Type:

Output Options
(Number of records to see)

Row Limit	Availability	Retrieval
<input checked="" type="radio"/> 250 rows	Immediate	Screen
<input type="radio"/> All rows	Scheduled	Download

Submit ✓

Customer	Account #	Invoice Type	Recurring Type	Amount	Day	Created On	Options
BAKER MARITA	PP-08164	Personal Property	Pay a fixed payment amount on selected day	\$100.00	15	6/28/2018 1:34:45 PM	
BAKER MARITA	PP-08164	Personal Property	Pay a fixed payment amount on selected day	\$100.00	1	6/28/2018 1:34:15 PM	

2. **Recurring Scheduled Payment Cancelled:** This notification will be sent when a recurring scheduled payment is canceled within the Customer Portal.

<p>Dear PHILLIP</p> <hr/> <p>Thank you for using our Customer Portal features to update your account profile. Based on your request, we have canceled your recurring scheduled payment for Water.</p> <p>If you did not initiate this change, or, if this information is not correct, please contact us right away.</p>	<p>Details</p> <p>Account Number: 349</p> <p>Invoice Type: Water</p>
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Scheduled Payment Reminder

This payer will receive the standard scheduled payment reminder email. This standard 3-day reminder details the transaction to be processed.

Payment Transaction Receipt

The standard payment transaction receipt that will be sent once a scheduled payment is processed.