CWP2 Auto Pay Management

If users are signed up for Auto Pay they can manage their Auto Pay options in CWP2.

Location
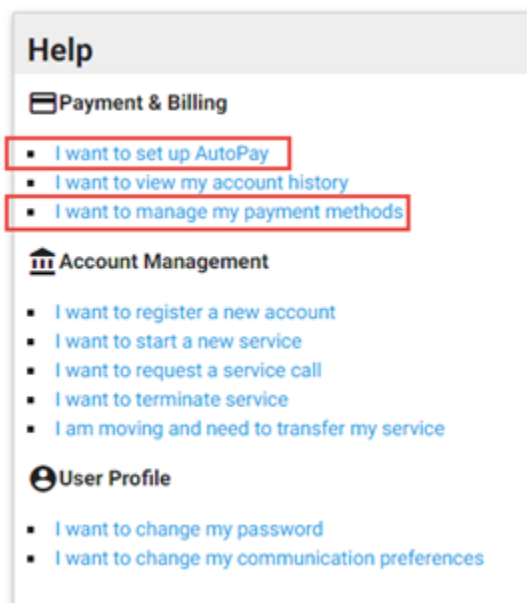
Help > Payment & Billing.
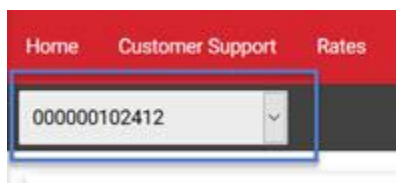There are 2 options to access the information.

- **I want to set up AutoPay**

- **I want to manage my payment methods**

Process

If portal users are associated/linked with multiple billing customers they may set up Auto Pay for each customer independently using the account selector drop down in the top left corner of the CWP2 screen.

- Click the down arrow to select the appropriate account.

- The **My Payment Methods** page allows users to make changes to their Auto Pay setup.

Add New Payment Account for Auto Pay

- Click the **ADD NEW PAYMENT METHOD** button in the top right.

Users must select a Payment Method.

- Available options depend upon company settings.
    - The data entry fields depend upon the selected option and configuration.
        - See **CWP2 Payment Form Configuration** for configuration details
- Payment Methods, fields, and validation are the same as the standard Payment form except for minor changes due to the difference between an Auto Pay setup (saving a recurring payment method) and the Payment form (creating a one-time payment).

Credit Card

- **Note: The layout of this screen will vary based on the Payment Gateway being used.**
- Enter the required credit card information.

Add Payment Source

- Click the **Use for recurring payments** check box at the bottom.

Add Payment Source

Bank Account

- Enter the required bank account information on the right of the screen.
  - **Use for recurring payments** check box at the bottom will default to be checked.

Add Payment Source

- Once all required data is entered and validated, users must click the green **Save** button at the bottom of the page to submit the Auto Pay information and create the new recurring payment method on their utility billing account.
- The **My Payment Methods** screen will display.

Change the Auto Payment Account

Users can only do this if they have more than 1 saved payment method and 1 is already set for **AUTOPAY**.

- Click the **SET AUTOPAY** button in the top right.

- The **Set AutoPay** screen will display.

Set AutoPay

Please select a payment method below to use for automatic payments, then click the confirmation button at the bottom of the form.

Bank Account		
🏛	Bank Account ending in 123	N/A

Payment Option ⓘ

Pay Bill Amount ▾

By clicking confirm, you authorize FIERCE COMPANY-JC1 to debit your account on a recurring basis.

CONFIRM   CANCEL

- The account that's currently set for **AUTOPAY** will not be included in the account list.
- Click the desired account that you want to change to be set for Auto Pay.

Set AutoPay

Please select a payment method below to use for automatic payments, then click the confirmation button at the bottom of the form.

Bank Account		
🏛	Bank Account ending in 123	N/A
🏛	Bank Account ending in 852	N/A

Payment Option ⓘ

Pay Bill Amount ▾

By clicking confirm, you authorize FIERCE COMPANY-JC1 to debit your account on a recurring basis.

CONFIRM   CANCEL

- The selected payment option will turn gray.
- Select the desired **Payment Option** from the drop down in the bottom left of the page to set the payment amount option that will be used when processing Auto Payments.

- For details regarding each option click the information icon to the right of **Payment Option**. This will display a list of the options and definitions.

- Maximum Amount and Fixed Amount options require amounts to be entered.
- Click **CONFIRM** in the bottom right corner to save.

- Click **CANCEL** in the bottom right corner to cancel the setup.

The **My Payment Methods** screen will display with a green **AUTOPAY** icon on the left of the payment method identifying that it will be used in the Auto Payment process.

Edit Auto Pay

Card information can be edited when it's set to Auto Pay.

- **NOTE: As of UMS 6.7.433, editing a wallet item does not disassociate it from Recurring Payments tied to Accounts linked to a User if that User has multiple accounts. Before, the Recurring Payment entity of all but one one of a User's Accounts would be disassociated from the payment method, resulting in the Recurring Payment being deactivated.**

Remove Auto Pay

Users can Remove AutoPay if they no longer want the feature.

- Click the **REMOVE AUTOPAY** button in the top right corner of the screen.

My Payment Methods

	METHOD	EXPIRES		
	Credit/Debit Cards			
VISA	Visa ending in 1111	02/2020		🗑
	Bank Account			
🏛 AUTOPAY	Bank Account ending in 123	N/A		★ ✏ 🗑
🏛	Bank Account ending in 852	N/A		✏ 🗑

[+ ADD NEW PAYMENT METHOD] [SET DEFAULT] [SET AUTOPAY] [REMOVE AUTOPAY]

- The **AUTOPAY** text will no longer display on any of the available accounts.
- The **REMOVE AUTOPAY** button will not be an option on the screen.

[+ ADD NEW PAYMENT METHOD] [SET DEFAULT] [SET AUTOPAY]

My Payment Methods

	METHOD	EXPIRES		
	Credit/Debit Cards			
VISA	Visa ending in 1111	02/2020		🗑
	Bank Account			
🏛	Bank Account ending in 123	N/A		★ ✏ 🗑
🏛	Bank Account ending in 852	N/A		✏ 🗑