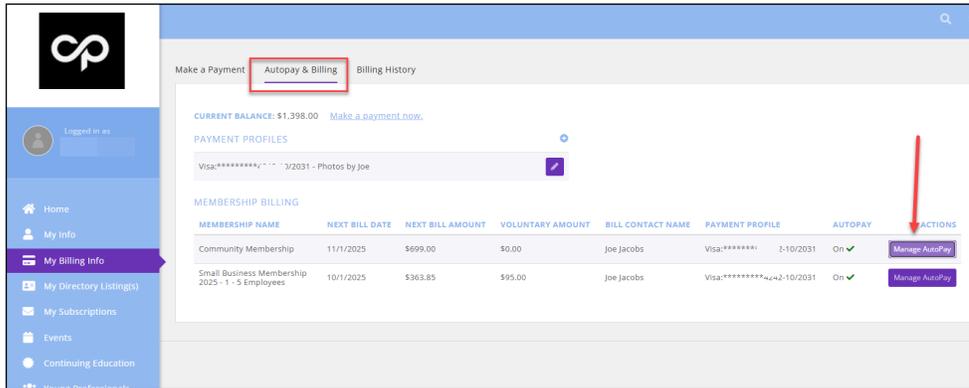


Manage AutoPay in the Info Hub

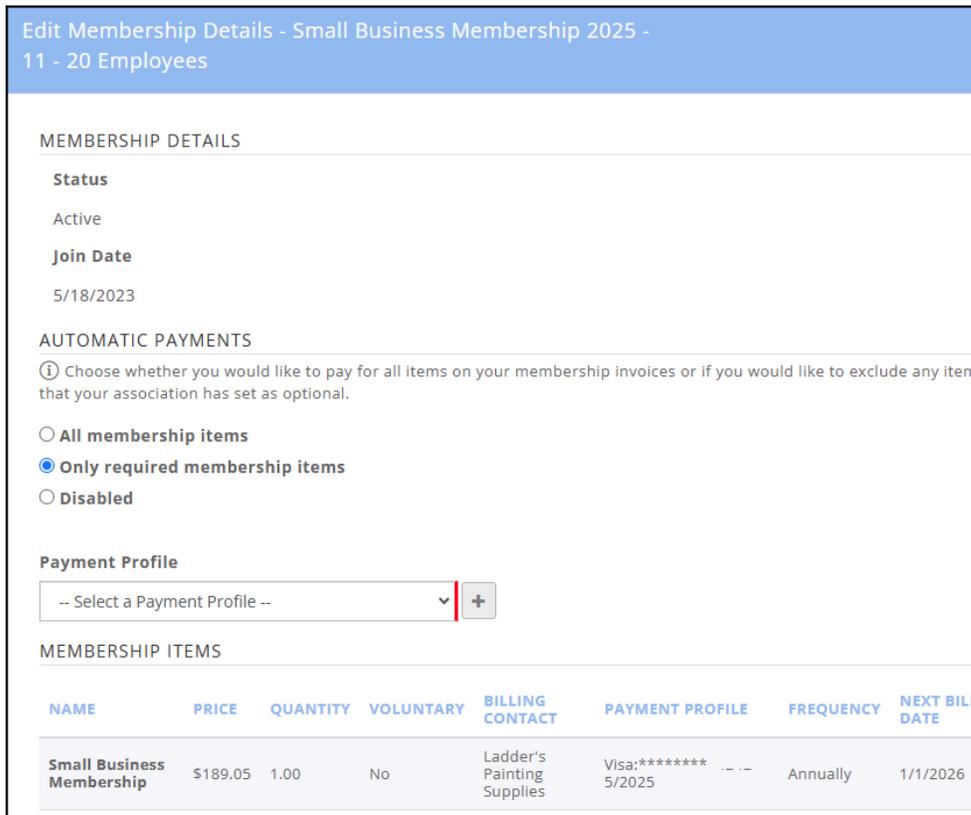
Riha Moss Mar 25, 2025

If a member has selected to enable AutoPay, they can manage their preferences by going to **My Billing Info** section and opening the **Autopay & Billing** tab. If AutoPay has been set up, they can click the "Manage AutoPay" button in the Membership Billing section.



The Manage Autopay button on the Autopay & Billing tab

This will open the **Edit Membership Details** window.



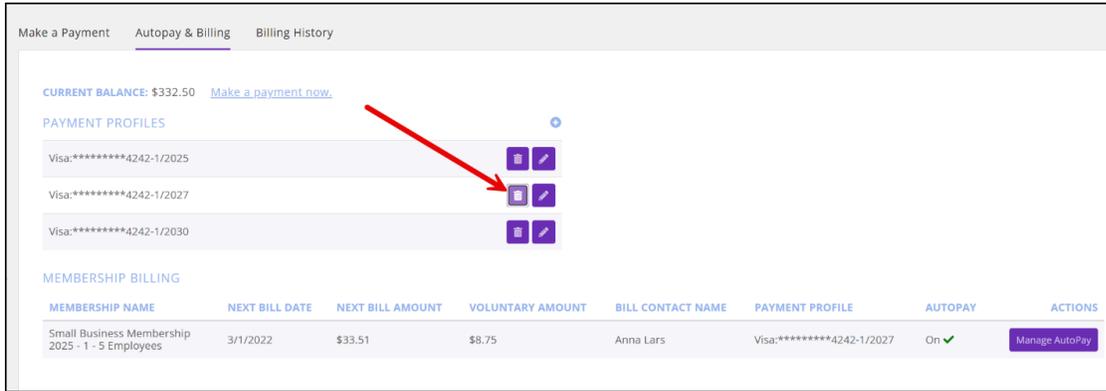
Edit Membership Details

In the Edit Membership Details window, under "Automatic Payments", members can make the following selections:

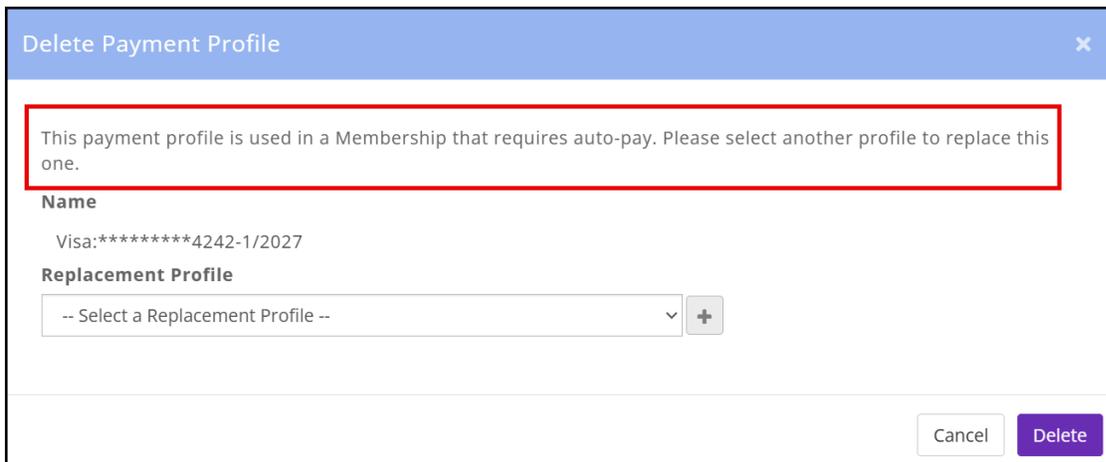
- **All membership items:** This will apply the card/account selected in the Payment Profile selector to pay for ALL items on the membership billing, both required and voluntary.

- **Only required membership items:** this will apply payment to ONLY the required items on the membership billing. Any voluntary items (items with a "Yes" in the Voluntary column) will remain unpaid.
- **Disabled:** this disables the AutoPay; no payments will be automatically made toward membership billing for this membership.
- Members will choose a stored payment profile or add a new one by clicking on the **plus sign**.

Members can remove a stored payment profile by clicking the trash can. This will prompt a message confirming the deletion or offering an opportunity to replace the profile.



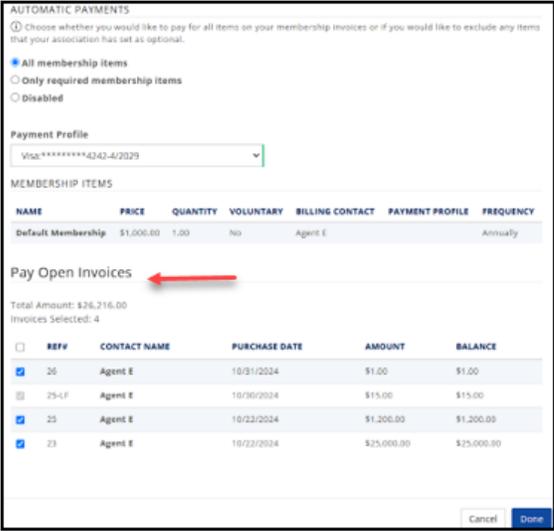
If the profile is tied to a membership type that requires **Autopay**, a specific prompt will occur reminding them to replace the payment profile.



Make any changes and click **Done** to save your changes.

Open Invoices and Autopay

When enrolling in Autopay, members will be given a checkbox prompt offering them the opportunity to pay for any other open invoices.



The screenshot shows the 'AUTOMATIC PAYMENTS' section of a user interface. It includes radio button options for 'All membership items', 'Only required membership items', and 'Disabled'. Below this is a 'Payment Profile' dropdown menu showing 'Visa*****4242-4/2029'. A table titled 'MEMBERSHIP ITEMS' lists 'Default Membership' with a price of \$1,000.00 and a frequency of 'Annually'. Below the table is a section titled 'Pay Open Invoices' with a red arrow pointing to it. This section shows a total amount of \$26,216.00 and a list of 4 selected invoices. At the bottom right are 'Cancel' and 'Done' buttons.

NAME	PRICE	QUANTITY	VOLUNTARY	BILLING CONTACT	PAYMENT PROFILE	FREQUENCY
Default Membership	\$1,000.00	1.00	No	Agent E		Annually

Pay Open Invoices

Total Amount: \$26,216.00
Invoices Selected: 4

<input type="checkbox"/>	REF#	CONTACT NAME	PURCHASE DATE	AMOUNT	BALANCE
<input checked="" type="checkbox"/>	26	Agent E	10/31/2024	\$1.00	\$1.00
<input checked="" type="checkbox"/>	25-LF	Agent E	10/30/2024	\$15.00	\$15.00
<input checked="" type="checkbox"/>	25	Agent E	10/22/2024	\$1,200.00	\$1,200.00
<input checked="" type="checkbox"/>	23	Agent E	10/22/2024	\$25,000.00	\$25,000.00

Cancel Autopay

Members can cancel Autopay from the Info Hub by Disabling their stored payment profile and then canceling the scheduled payment if an invoice was already generated for an upcoming billing

1. Click on **Autopay** from My Billing Info and then click on **Manage Autopay**.
2. Choose **Disable**.
3. From the Payment tab of My Billing Info, select the Actions by invoice with the scheduled payment.
4. Cancel Payment.

1

Autopay & Billing

Make a Payment

CURRENT BALANCE: \$1,398.00 [Make a payment now.](#)

PAYMENT PROFILES

MEMBERSHIP BILLING

MEMBERSHIP NAME	NEXT BILL DATE	NEXT BILL AMOUNT	VOLUNTARY AMOUNT	BILL CONTACT NAME	PAYMENT PROFILE	AUTOPAY	ACTIONS
Community Membership	11/1/2025	\$699.00	\$0.00	Joe Jacobs	Visa:*****4242-10/2031	On ✓	Manage AutoPay
Small Business Membership 2025 - 1 - 5 Employees	10/1/2025	\$363.85	\$95.00	Joe Jacobs	Visa:*****4242-10/2031	On ✓	Manage AutoPay

2

Disabled

MEMBERSHIP DETAILS

Status: Active

Join Date: 5/18/2023

AUTOMATIC PAYMENTS

Choose whether you would like to pay for all items on your membership invoices or if you would like to exclude any items that your association has set as optional.

All membership items

Only required membership items

Disabled

Payment Profile: -- Select a Payment Profile --

MEMBERSHIP ITEMS

NAME	PRICE	QUANTITY	VOLUNTARY	BILLING CONTACT	PAYMENT PROFILE	FREQUENCY	NEXT BILL DATE
Small Business Membership	\$189.05	1.00	No	Ladder's Painting Supplies	Visa:*****4242-5/2025	Annually	1/1/2026
Association Fund	\$95.00	1.00	Yes	Ladder's Painting Supplies		Annually	1/1/2026
11 - 20 Employees	\$71.25	1.00	No	Ladder's Painting Supplies	Visa:*****4242-5/2025	Annually	1/1/2026
Advertising Package	\$56.05	1.00	No	Ladder's Painting Supplies	Visa:*****4242-5/2025	Annually	1/1/2026

Manage Autopay and Disable

3

Make a Payment

BALANCES

Photos by Joe: \$1,398.00

Filter to the invoices you wish to pay, then click Make a Payment.

Result Count: 2

DATE	REF #	CONTACT NAME	DETAILS	BALANCE	DUE DATE	ACTION
11/1/2024	425	Joe Jacobs (Invoice for Photos by Joe)	Community Dues (\$600.00) Advertising Package (\$99.00)	\$699.00	11/1/2024	Enter Credit Card Download Invoice Edit Scheduled Payment Cancel Payment
8/12/2024	393	Joe Jacobs (Invoice for Photos by Joe)	Community Dues (\$600.00) Advertising Package (\$99.00)	\$699.00	8/12/24	

4

Cancel Payment

Cancel Scheduled Payment