## 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.

|                             |   |                   |                 |                  |                  |                         |         | ۹ د             |
|-----------------------------|---|-------------------|-----------------|------------------|------------------|-------------------------|---------|-----------------|
| Cp                          | Make a Payment Autopay & E                      | illing Billing Hi | story           |                  |                  |                         |         |                 |
| Logged in as                | CURERNT BALANCE: \$1.398.00 Make a payment how. |                   |                 |                  |                  |                         |         |                 |
|                             | Visie***********************************        |                   |                 |                  |                  |                         |         |                 |
| 😤 Home                      | MEMBERSHIP BILLING                              | NEXT BULL DATE    | NEXT BUL AMOUNT | VOLUNTARY AMOUNT | BUL CONTACT NAME | DAVMENT DOOFU F         | AUTODAY | ACTIONS         |
| 🚊 My Info                   | Community Momborchin                            | 11/1/2025         | \$600.00        | \$0.00           | Ine locobs       | Vice HARMAN A 10/2021   | AUTOPAT | ACTIONS         |
| 📰 My Billing Info           | Commonly wendership                             | 11/1/2025         | 2035.00         | 30.00            | 106190003        | 138. 210/2031           | UII •   | manage Autor ay |
| My Directory Listing(s)     | 2025 - 1 - 5 Employees                          | 10/1/2025         | \$363.85        | \$95.00          | Joe Jacobs       | Visa:********42-10/2031 | On 🗸    | Manage AutoPay  |
| 🖂 My Subscriptions          |   |                   |                 |                  |                  |                         |         |                 |
| 📋 Events                    |   |                   |                 |                  |                  |                         |         |                 |
| Continuing Education        |   |                   |                 |                  |                  |                         |         |                 |
| • • • Voung Operfording als |   |                   |                 |                  |                  |                         |         |                 |

The Manage Autopay button on the Autopay & Billing tab

This will open the Edit Membership Details window.

| Edit Membersh<br>11 - 20 Employe          | ip Detai<br>ees  | ls - Small | Business M | embership                        | 2025 -                |           |                  |  |  |
|---|--|------------|------------|----------------------------------|-----------------------|-----------|------------------|--|--|
| MEMBERSHIP D                              | ETAILS   |            |            |                                  |                       |           |                  |  |  |
| Status                                    |  |            |            |                                  |                       |           |                  |  |  |
| Active                                    |  |            |            |                                  |                       |           |                  |  |  |
| Join Date                                 |  |            |            |                                  |                       |           |                  |  |  |
| 5/18/2023                                 |  |            |            |                                  |                       |           |                  |  |  |
| AUTOMATIC PA                              | YMENTS   |            |            |                                  |                       |           |                  |  |  |
| (i) Choose whether<br>that your associati | ① Choose whether you would like to pay for all items on your membership invoices or if you would like to exclude any item that your association has set as optional. |            |            |                                  |                       |           |                  |  |  |
| Only required                             | lip items<br>I member  | shin items |            |                                  |                       |           |                  |  |  |
| O Disabled                                |  |            |            |                                  |                       |           |                  |  |  |
| Payment Profile                           |  |            |            |                                  |                       |           |                  |  |  |
| Select a Paym                             | ient Profile   |            | ~          | +                                |                       |           |                  |  |  |
| MEMBERSHIP IT                             | TEMS   |            |            |                                  |                       |           |                  |  |  |
| NAME                                      | PRICE  | QUANTITY   | VOLUNTARY  | BILLING<br>CONTACT               | PAYMENT PROFILE       | FREQUENCY | NEXT BIL<br>DATE |  |  |
| Small Business<br>Membership              | \$189.05   | 1.00       | No         | Ladder's<br>Painting<br>Supplies | Visa:******<br>5/2025 | Annually  | 1/1/2026         |  |  |

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.

| ike a Payment Autopay & B                           | illing Billing Histo | ry               |                  |                   |                         |         |                |
|---|----------------------|------------------|------------------|-------------------|-------------------------|---------|----------------|
| CURRENT BALANCE: \$332.50                           | Make a payment no    | v.               |                  |                   |                         |         |                |
| PAYMENT PROFILES                                    |                      |                  | 0                |                   |                         |         |                |
| Visa:******4242-1/2025                              |                      |                  |                  |                   |                         |         |                |
| Visa:******4242-1/2027                              |                      |                  |                  |                   |                         |         |                |
| Visa:******4242-1/2030                              |                      |                  | <b>i</b>         |                   |                         |         |                |
| MEMBERSHIP BILLING                                  |                      |                  |                  |                   |                         |         |                |
| MEMBERSHIP NAME                                     | NEXT BILL DATE       | NEXT BILL AMOUNT | VOLUNTARY AMOUNT | BILL CONTACT NAME | PAYMENT PROFILE         | AUTOPAY | ACTIONS        |
| Small Business Membership<br>2025 - 1 - 5 Employees | 3/1/2022             | \$33.51          | \$8.75           | Anna Lars         | Visa:*******4242-1/2027 | On 🗸    | Manage AutoPay |
|   |                      |                  |                  |                   |                         |         |                |

| Delete Payment Profile   |   |   |      |        | ×   |
|--|---|---|------|--------|-----|
| Are you sure you want to delete this saved payment method?<br>Name<br>Visa:*******4242-1/2028<br>Replacement Profile |   |   |      |        |     |
| Select a Replacement Profile   | ~ | + |      |        |     |
|  |   |   | Canc | el Del | ete |

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

| Delete Payment Profile  |        |
|---|--------|
| This payment profile is used in a Membership that requires auto-pay. Please select another profile to replace t<br>one. | this   |
| Name<br>Visa:******4242-1/2027<br>Replacement Profile   | _      |
| Select a Replacement Profile V  |        |
| Cancel  | Delete |

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.

| AUTOMATIC PAYMENTS |   |                 |          |            |              |                 |                |  |  |  |  |  |
|--------------------|---|-----------------|----------|------------|--------------|-----------------|----------------|--|--|--|--|--|
| () Che<br>that yo  | ① 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              | All membership items  |                 |          |            |              |                 |                |  |  |  |  |  |
| Onl                | Only required membership items  |                 |          |            |              |                 |                |  |  |  |  |  |
| Obis               | O bisabled  |                 |          |            |              |                 |                |  |  |  |  |  |
| Paym               | Payment Profile   |                 |          |            |              |                 |                |  |  |  |  |  |
| Visa               | ********  | 4242-4/2029     |          | ~          |              |                 |                |  |  |  |  |  |
| меме               | BERSHIP I   | TEMS            |          |            |              |                 |                |  |  |  |  |  |
| NAM                |   | PRICE           | QUANTITY | VOLUNTARY  | BILLING CONT | ACT PAYMENT PRO | FILE FREQUENCY |  |  |  |  |  |
| Defa               | alt Member  | ship \$1,000.00 | 1.00     | No         | Agent E      |                 | Annually       |  |  |  |  |  |
| Pay<br>Total /     | Open Ir<br>Imount: \$2<br>es Selected   | es,216.00       |          |            |              |                 |                |  |  |  |  |  |
|                    | REFU  | CONTACT NAM     | ε        | PURCHASE D | ATE          | AMOUNT          | BALANCE        |  |  |  |  |  |
| 8                  | 26  | Agent E         |          | 10/31/2024 |              | \$1.00          | \$1.00         |  |  |  |  |  |
| 8                  | 25-U  | Agent E         |          | 10/30/2024 |              | \$15.00         | \$15.00        |  |  |  |  |  |
| 8                  | 25  | Agent E         |          | 10/22/2024 |              | \$1,200.00      | \$1,200.00     |  |  |  |  |  |
|                    | 23  | Agent E         |          | 10/22/2024 |              | \$25,000.00     | \$25,000.00    |  |  |  |  |  |
|                    |   |                 |          |            |              |                 |                |  |  |  |  |  |
|                    |   |                 |          |            |              |                 | Cancel Done    |  |  |  |  |  |

## **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.

|  | •  |  |   |                              |  |                              |                   |                                 |         | ۵ ۵            |
|--|--|--|---|------------------------------|--|------------------------------|-------------------|---------------------------------|---------|----------------|
| Make a Payment Aut   | opay & Billing Billing   | g History  |   |                              |  |                              |                   |                                 |         |                |
| Lugged in as<br>Dep Jacoba - Photos<br>by Jacoba - Photos<br>Jacoba - Photos<br>Lugged in as<br>Dep Jacoba - Photos<br>Dep Jacoba - Photos | 11,398.00 <u>Make a payr</u><br>IS<br>10/2031 - Photos by Joe  | ment now   |   |                              | 0  |                              |                   |                                 |         |                |
| A My Info  | NEXT BILL DA   | TE NE  | T BILL AMO  | UNT VOLU                     | NTARY AMOUNT                               | BILL CONTACT NAME            | PAYMENT P         | ROFILE                          | AUTOPAY |                |
| My Billing Info     Community Members     My Directory Listing(s)     Community Members     Small Business Memb     2025 - 1 - 5 Employee  | hip 11/1/2025<br>pership 10/1/2025   | \$69<br>\$36   | 9.00  | \$0.00                       | 5  | Joe Jacobs<br>Joe Jacobs     | Visa:******       | ***4242-10/2031 ***4242-10/2031 | On V    | Manage AutoPay |
| Any Soliscriptions     Events     Continuing Education     Voung Professionals   | Edit Membership<br>11 - 20 Employee<br>MEMBERSHIP DE<br>Status<br>Active<br>Join Date<br>S/18/2023<br>AUTOMATIC PAY<br>Q Choose whether<br>that your association<br>AUTOMATIC PAY<br>Q Choose whether<br>that your association<br>Payment Profile<br>– Select a Paymer<br>MEMBERSHIP ITE | D Details<br>25<br>TAILS<br>MENTS<br>you would<br>a has set<br>a there<br>a beers<br>2<br>therefile<br>therefile | s - Small E<br>I like to pay a<br>is optional:<br>hip items | Susiness M<br>Srall items of | tembership 2                               | 025 -                        | d like to exclude | × e any items                   |         |                |
|  | NAME<br>Small Business   | 5189.05  | QUANTITY  | VOLUNTARY                    | BILLING<br>CONTACT<br>Ladder's<br>Painting | Visa:**********              | Appually          | NEXT BILL<br>DATE               |         |                |
|  | Membership<br>Association<br>Fund  | \$95.00  | 1.00  | Yes                          | Supplies<br>Ladder's<br>Painting           | 5/2025                       | Annually          | 1/1/2026                        |         |                |
|  | 11 - 20<br>Employees   | \$71.25  | 1.00  | No                           | Ladder's<br>Painting<br>Supplies           | Visa:********4242-<br>5/2025 | Annually          | 1/1/2026                        |         |                |
|  | Advertising<br>Package   | \$56.05  | 1.00  | No                           | Ladder's<br>Painting<br>Supplies           | Visa:*******4242-<br>5/2025  | Annually          | 1/1/2026                        |         |                |
|  |  |  |   |                              |  |                              | Cance             | Done                            |         |                |

Manage Autopay and Disable

| 00  |                                      | 3                              |   |  |          |              | Q \$  |
|---|--------------------------------------|--------------------------------|---|--|----------|--------------|---|
| Cp  | Make a Payme                         | nt Autopay &                   | Billing Billing History                                   |  |          |              |   |
| Logged in as<br>Joe Jacobs - Photos<br>by Joe | BALANCE<br>Photos b                  | S<br><b>y Joe: \$</b> 1,398.00 |   |  |          |              |   |
| A Home  | Filter to th<br>Search<br>Result Cou | e invoices you wis             | sh to pay, then click Make a Payment. Show only Customize | Results  |          |              | Make a Payment                                  |
| 🚊 My Info                                     | DATE                                 | REF Ø                          | CONTACT NAME  | DETAILS  | BALANCE  | DUE DATE     | ACTION  |
| My Billing Info                               | 11/1/2024                            | 425                            | Joe Jacobs (Invoice for Photos by Joe)                    | Community Dues (\$600.00)<br>Advertising Package (\$99.00) | \$699.00 | 11/1/2024    | Actions -                                       |
| My Directory Listing(s)                       | 8/12/2024                            | 393                            | Joe Jacobs (Invoice for Photos by Joe)                    | Community Dues (\$600.00)<br>Advertising Package (\$99.00) | \$699.00 | 8/12/2 Enter | Credit Card<br>load Invoice<br>cheduled Payment |
| Events  |                                      |                                |   |  |          |              | a Payment                                       |
| Continuing Education                          |                                      |                                |   |  |          |              |   |
| 🕾 Young Professionals                         |                                      |                                |   |  |          |              |   |
| Resources                                     |                                      |                                |   |  |          |              |   |
|   |                                      |                                |   |  |          |              |   |
| Jobs  |                                      |                                |   |  |          |              |   |

Cancel Scheduled Payment