Set Up & Manage AutoPay

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When you set up AutoPay, payments are made automatically from the bank account ^{CST} or credit card you designate. You can also set payment limits that ensure that only invoices equal to or less than the selected limit are charged to your payment method. Any invoices exceeding this limit must be paid manually.

Once AutoPay is enabled, you will receive an email reminder of the upcoming payment three (3) days before the payment is charged against your account.

Note: You can only have one payment method active for Autopay at a time. If you have an existing AutoPay account and add a new one, the new account is automatically set to Inactive.

In this article:

- Add AutoPay Accounts
- Set Payment Limits
- Deactivate AutoPay Accounts
- Activate AutoPay Accounts
- Delete AutoPay Accounts

Add AutoPay Accounts

Add a bank account or credit card to your AutoPay Settings to use that card or account to automatically pay your invoices. These accounts are added separately from those stored on the Accounts page.

Note: When you add and verify a bank account via the Accounts page, you can click **Set Up AutoPay** after verification to add it to your AutoPay Settings. Credit cards must be set up separately.

- 1. From the menu to the left, click Payment Settings.
- 2. Click Autopay Settings. The AutoPay Settings page opens.
 - If you are adding a bank account, go to Step 3.
 - If you are adding a credit card, go to Step 4.
- 3. To add a bank account:
 - a. Click Add Account and select Bank. The Add Bank Account pop-up opens.
 - b. Click the Name on Account box and enter your full name as it appears on your bank account.
 - c. Click the Routing Number and enter the routing number for your bank account.
 - d. Click the Account Number box and enter your full bank account Number.

	×			
Add Bank Account				
Adding a bank account will allow you to set up one-time or recurring ACH payments which enable you to authorize your bank to quickly send money from your account to pay your invoices eliminating the need for paper checks and cash payments				
Click here for more details and FAQs regarding ACH Payments				
Name on Account *	Julia Jones			
Routing Number *	021000021			
Account Number *	111111111122334			
Cancel Continue				
Step 1/2				

- e. Click **Continue**. The Pending Verification message displays. Your bank account is at Pending status until you receive the two small deposits from Stripe.
- f. Once you receive these deposits, return to the AutoPay Settings page, click the bank account, and enter them to verify your account.
- 4. To add a credit card:
 - a. Click Add Account and Credit Card. The Register Credit Card for AutoPay pop-up opens.
 - b. Click the **Card Number** box and enter your credit card number exactly as it appears on the card.
 - c. Click the MM/YY box and enter the expiration month and year for the card.
 - d. Click the CVC box and enter the CVC for your card. You can find this three-digit code on the back of most major credit cards. If this is an American Express card, the CVC is the four-digit number on the front of the card.



e. Click Submit.

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Set Payment Limits

Set payment limits to ensure that only invoices equal to or less than your limit are charged to your payment method. If an invoice exceeds the limit you set, AutoPay will not run and you must pay the invoice manually. You will be notified via email that an invoice has exceeded your AutoPay limit.

- 1. From the menu to the left, click **Payment Settings**.
- 2. Click Autopay Settings. The AutoPay Settings page opens.
- 3. In the Payment Limit section, check the Set a Payment Limit for Invoices box.
- 4. Click the Payment Limit box and enter the maximum dollar amount you wish to automatically pay.

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🕋 🔤 o(;	🙀 > Payment Settings > AutoPay Settings	
쓥 Home	AutoBay Accounts	Add Account
\$ Involces	Autoray Accounts	PRO ALCOUR -
Payment Settings >	STRIPE TEST BANK	
- Accounts	Account: V000X-2227	
- Autopay Settings		
🖻 Reports	Additional fees for bank account and credit card transaction fees may apply. Click here for more details.	
Messages	Payment Limit	About AutoPay
😮 Get Help	You can set a limit for AutoPay. This will ensure that only invoices equal to or less than the limit selected will be charged to your payment source. Any invoices exceeding the limit will need to be paid manually.	Once you sign up for AutoPay the account of your choosing will be debited automatically when you receive an invoice.
() Logout	Set a payment limit for invoices Payment Limit \$ 300.00 Save	Never worry about late payments again with secure, economical and easy automatic payments. Learn More.
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	Terms Privacy Policy Cookie Policy	A

5. Click Save.

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Deactivate AutoPay Accounts

You can only have one payment method active for Autopay at a time. If you have an existing AutoPay account and add a new one, the new account is automatically set to Inactive. Deactivate the AutoPay methods you are not currently using.

- 1. From the menu to the left, click Payment Settings.
- 2. Click Autopay Settings. The AutoPay Settings page opens.
- You will see an option that says "To update/cancel Auto Pay, please click here." Click on the words click here and the following image will pop-up on your screen.

Manage Auto F	Payment Options
Cancel Auto Payments	
Cancel	Save

- 4. Check the box next to Cancel Auto Payments.
- 5. Click Save.

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Activate AutoPay Accounts

If you need to activate a different AutoPay account, you can do so. Activating a new AutoPay account automatically deactivates the currently active account. For example, if your bank account is Active and you activate your credit card, the bank account is automatically deactivated.

- 1. From the menu to the left, click Payment Settings.
- 2. Click Autopay Settings. The AutoPay Settings page opens.
- 3. Click the account to activate. The AutoPay Account Details pop-up opens.

AutoPay Account Details		×
Account Type: Credit Card Type: Visa Name on Account: Julia mother qa Account: XXXXX-4242 Last Used:		
	Activate	Delete

4. Click **Activate**. The account is Activated. If you already had an active AutoPay account, it is automatically deactivated.

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Delete AutoPay Accounts

To delete AutoPay accounts you are no longer using:

- 1. From the menu to the left, click **Payment Settings**.
- 2. Click Autopay Settings. The AutoPay Settings page opens.
- 3. Click the account to delete. The AutoPay Account Details pop-up opens.

AutoPay Account Details		×
Account Type: Credit Card Type: Visa Name on Account: Julia mother qa Account: XXXXX-4242 Last Used:		
	Deactivate	Delete

- 4. Click Delete.
- 5. At the Are You Sure prompt, click Yes.

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