

# Auto Invoice Payment

## Prerequisites

- Braintree
- Stored credit cards (Customer Payment Tokens)

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## Overview

Auto Invoice Payments allows your customers to have their invoices paid automatically. Once enabled, customers can setup their payment details once and have their invoices paid without needing to visit the site.

## Setup Guide

## Customer experience

1. Customer visits the **Pay Account** page
2. When your customer clicks the "Configure" button in "Auto Invoice Payment Collection" block they'll be sent to the configuration page

🏠 / Dashboard / Pay Account

### 📄 Pay outstanding invoices

#### 📄 Invoice Details

Invoice / Order Number

Invoice No.  Order No.

**⚙️ Auto Invoice Payment Collection**  
Setup automatic invoice payment to ensure you never miss another due date, simply attach a payment method, accept the terms of collection and let us take care of the rest.

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**You can choose from the day based periods below, to auto-select the invoices for those time spans.**

Current: **\$0.00**    30 Days: **\$0.00**    60 Days: **\$0.00**    90+ Days: **\$46,476.82**

**Unallocated Payments: \$0.00**

Show All Orders    Show Web Orders Only    Show My Orders Only

3. From here they can follow the prompts to add a card, accept the terms and conditions (that you specify), enable the feature, and enter some contact details for auto invoice related emails

### ⚙️ Auto Invoice Payment Configuration

Set up your Auto Invoice Payment

📄 Credit Card Detail

No credit card found

✓ Add Credit Card

#### ✓ Agree Terms & Conditions

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Accept Terms & Conditions

#### ⚙️ Enable & Setup Notification

Enable Automatic Invoice Payment

Add multiple semicolon separated email addresses to receive the Payment Confirmation emails

Email Addresses \*

✓ Save

👁️ Go To Pay Account

4. When your customer is done and they return to the **Pay Account** page, they'll notice the "Auto Invoice Payment Collection" block confirms their setup and the next expected payment amount and date

### 💰 Pay outstanding invoices

#### 📄 Invoice Details

Invoice / Order Number

🔍 Search

Invoice No.  Order No.

✓ **Auto Invoice Payment Collection**

Your next payment of \$1,542 will be deducted on 12/11/2024

Your card will expire on 31/12/2024.

Configure

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You can choose from the day based periods below, to auto-select the invoices for those time spans.

<input type="checkbox"/> Current: \$0.00	<input type="checkbox"/> 30 Days: \$0.00	<input type="checkbox"/> 60 Days: \$0.00	<input type="checkbox"/> 90+ Days: \$46,476.82
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Unallocated Payments: \$0.00

Show All Orders  Show Web Orders Only  Show My Orders Only



#### Important to know

Automatic invoice payment configurations are set at a customer account level

## Step-by-step guide

### Enable Auto Invoice Payment

1. In the CMS, go to **Settings Settings Feature Management Stored Credit Cards & Auto Invoice Payment Collection**

2. Click **Configure**.

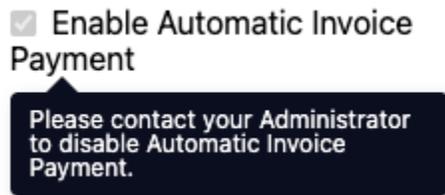


3. In the **Automatic Invoice Payment Collection** section, click on the toggle labelled **Enable Automatic Invoice Payment Collection**.



4. Enter the **Terms and Conditions** that you would like the customer to agree to

5. Set the "Allow users to opt out of Auto Invoice Payment" according to your terms and conditions  
When the toggle is on, customers are able switch off automatic invoice payment from the configure page, otherwise your customers will see the below tooltip:



6. Enter into the **BCC Notification email** any email address that you would like to receive the same notifications as customers do. This can be any email and doesn't need to be one on file.

7. Once some customers have setup Auto Invoice Payments, you'll notice the **Customer Accounts** section populates. From which, you can switch off automatic invoice payment collection on behalf of customers, regardless of whether they're able to do it themselves (like in step 5).



Switching off auto invoice payment for a customer and hitting save will trigger the "Auto Invoice Payment Disabled" email to the customer - to give them peace of mind that no more charges will take place.

## Edit Email Templates and Settings (optional)

- **Auto Invoice Payment Reminder** - Sent to customers 3 days before a payment is due, so they know to expect some money to be charged.
- **Auto Invoice Payment Failed Email** - Sent to the customer when an auto invoice payment fails, including the reason for the failure
- **Auto Invoice Payment Successful Email** - Sent when a payment is successful
- **Auto Invoice Payment Disabled Email** - Sent to the customer when the feature is disabled to ensure their peace of mind that no more charges will take place.

Minimum Version Requirements	4.42+
Prerequisites	<ul style="list-style-type: none"> <li>• Braintree</li> <li>• Stored Credit Cards</li> </ul>
Self Configurable	Yes
B2B/B2C/Both	B2B Only

## Related Resources

- [Braintree Payment Settings](#)
- [Customer Token Payments](#)

