Automatic Payments

04/11/2025 10:09 am CDT

Overview

Automatic payments are a convenient way to streamline billing by securely charging a customer's saved payment method on a set schedule or upon completion of a service. This helps businesses get paid faster, reduce manual work, and minimize missed or late payments, improving overall cash flow and customer satisfaction.

This article will review:

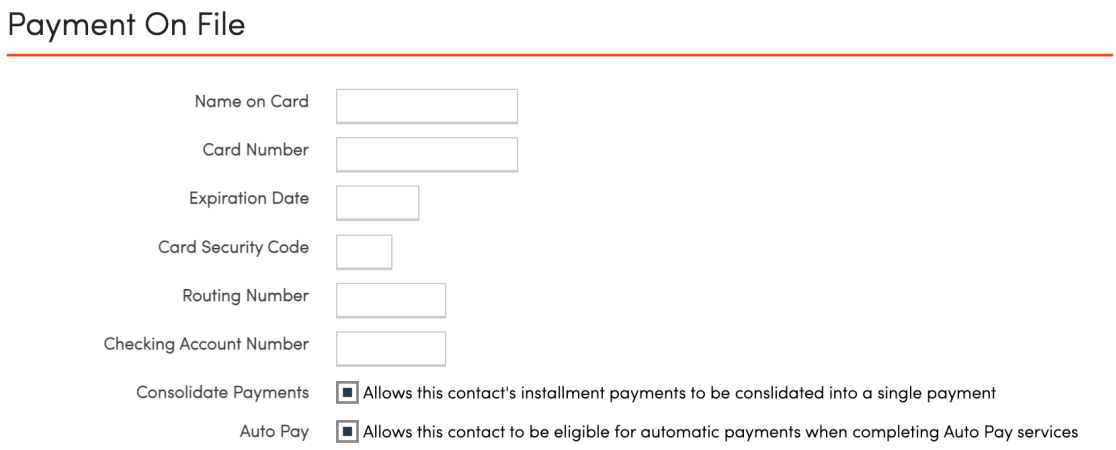
- Settings and Navigation
- Using Auto Pay
- Consolidate Payments
- FAQs

Settings and Navigation

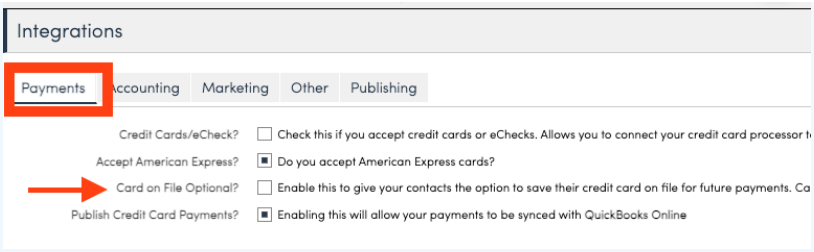
For Automatic Payments to run, the following conditions must be met:

Navigate to **Control Panel > Services**, edit the applicable service(s), and check the **Auto Pay When Complete** box.

Opt the Contact in to Auto Pay by ensuring a card is on file and the **Auto Pay** box is checked. The **Consolidate Payments** box is optional - read more about that feature below.



Review your settings in **Control Panel > Integrations > Payments.**



If **Card on File Optional** is checked, customers are allowed to choose if their card is saved on file. You can always enter their card information manually in the system, but if you want to save it automatically when they enter it themselves, make sure this box is not checked.

Using Auto Pay

If **Auto Pay** is on when the appointment is finished, and the contact has a card on file, we will generate an **Installment Payment** scheduled to run shortly. This will charge the contact's card and apply the payment to the invoice and send them a receipt.

Failed Payments

If the payment fails, the installment payment will be in failed status (listed in the**Failed Payments** snapshot) and will send a notification to the contact that it failed with a link for them to click and update their card on file. When they do this, the charge will try again immediately and the payment will be applied to the invoice.

The installment payment will continue to be tried daily, up to 2 more times, until it is successful or runs out of retry attempts.

If the contact does not have a card on file, we will send them the invoice to prompt for payment and to store the card on file for future services.

Consolidate Payments

If you have **Consolidate Payments** enabled, Auto Pay will still create the installment payment but it won't run the card. All Auto Pay generated installment payments will instead run on the configured day and time.

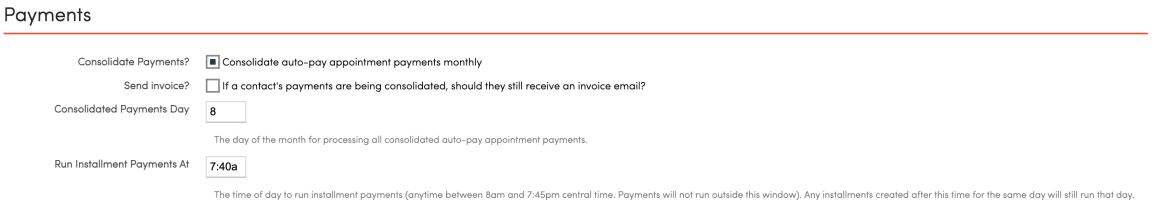
When consolidated payments run, it will group all pending installment payments from prior appointments, charge the contact's card for the total amount of those payments and then apply that payment to the corresponding invoices.

Consolidating payments does not affect the original invoices. If you have 4 appointments that each generated a $25 invoice and consolidated payments are used, we will run a single charge for $100 and apply that payment to all 4 invoices.

Enable Consolidated Payments

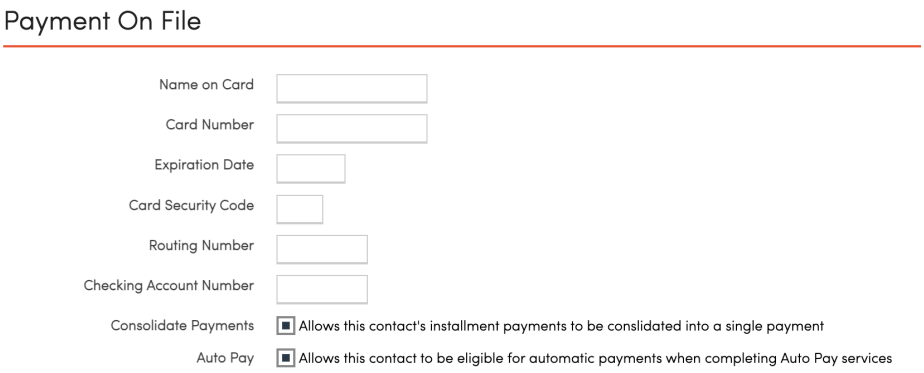
1. Go to **Control Panel > Invoicing,** navigate to the **Payments** section and check the box **Consolidate Payments**.
    - Select a date and time to fun payments each month and choose whether or not to send separate invoice emails. The invoice emails are separate from the receipt email, which will be sent once per month when

the payment is run.



2. Navigate to **Control Panel > Services**, edit the applicable service(s), and check the **Auto Pay When Complete** box.

3. When adding or editing a contact, check the boxes for **Consolidate Payments** and **Auto Pay** to opt them in.



If contacts are in a "Managed By" relationship, Consolidated Payments will apply as long as **both parent and child** are opted in to **Consolidate Payments** and **Auto Pay** AND the parent contact (manager) has a **card on file**.

Transaction Error

If that transaction fails, we will send a notification to the contact and retry over the next two days. If the contact updates their card on file from the notification, we will run a single consolidated payment and apply to the open invoices.

Schedule

The auto-payments function only process payments between 8 a.m. and 8 p.m. in your timezone. This is intended to be a client-friendly favor so they aren't getting payment notifications on their phones at odd hours.

FAQs

If we want consolidated payments to happen on the last day of the month, should we put 31? Or would putting 31 cause all the months that end in 30 or Feb to miss?

Setting the consolidated pay date for 31 will run on the last day of each month (i.e., June 30 or February 28).

How do I know if someone has their card on file?

You will see it on their Contact Details Page. There is a **Card on File** section that appears with a blue pencil and an X next to it in case their cc information needs to be updated or you want to remove that cc completely.