Automatic Payments

11/20/2025 9:18 am CST

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

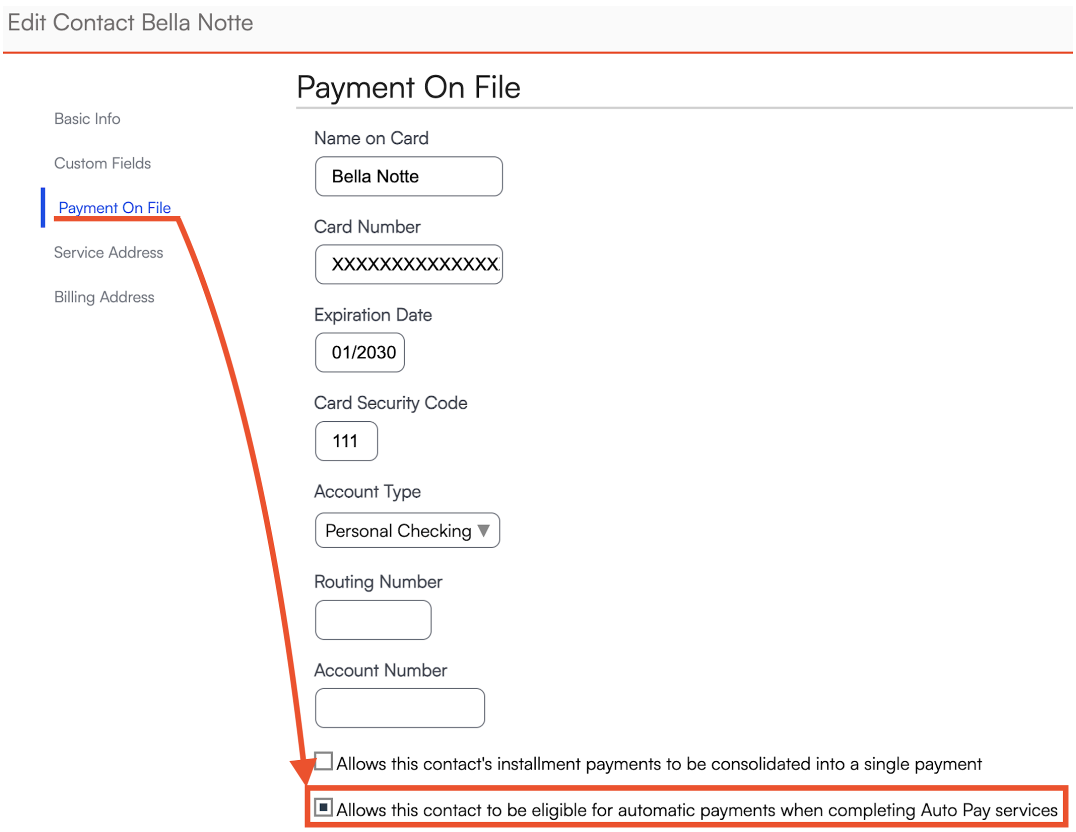
For Automatic Payments to run, the following conditions must be met:

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

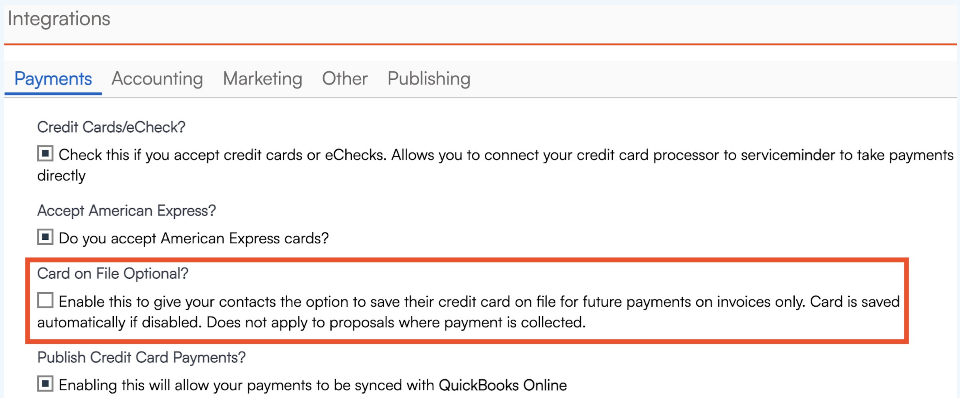
☐ Auto Pay When Complete?

If enabled, invoices will be paid automatically when appointments are completed if the contact has a credit card on file.

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

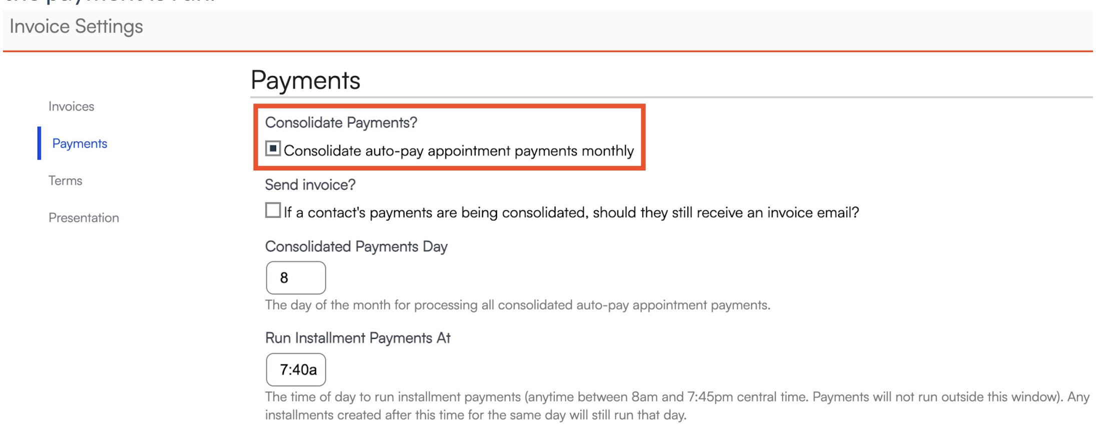
If you have **Consolidate Payments** enabled, Auto Pay will still create the installment payment but it won't run the card. All Auto Pay generated installment payments will instead run on the configured day and time.

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 run 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.

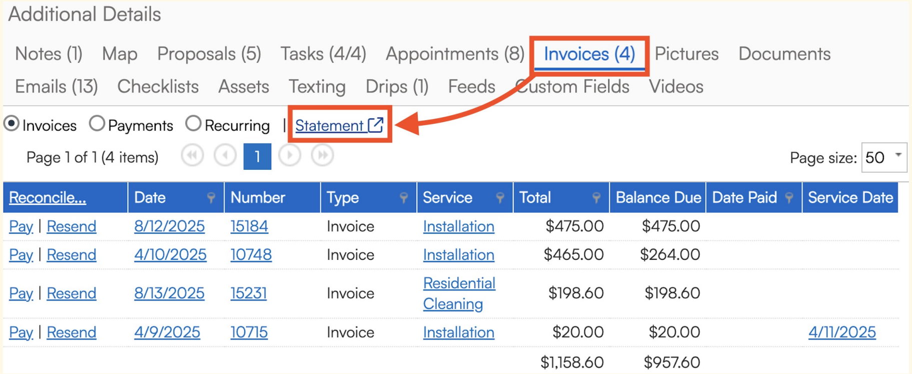
3. When adding or editing a contact, check the boxes for **Consolidate Payments** and **Auto Pay** to opt them in.

   Note: When adding a new contact, Consolidate Payments will default to the organization-level setting. This means it will automatically default to "On" for all new added contacts if it is enabled for your organization and you must turn it off for any new contacts that you wish to exclude.

- [x] Allows this contact's installment payments to be consolidated into a single payment
- [x] Allows this contact to be eligible for automatic payments when completing Auto Pay services

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**.

Consolidated payments will **not** run if there is no payment on file (credit card or ACH). If you do not have a payment on file for a customer, but they want to pay multiple invoices at once with one payment, you can send them their **Statement Link** instead. Find the Statement Link via **Contact Details Page > Invoices Tab.**



Reconcile...	Date	Number	Type	Service	Total	Balance Due	Date Paid	Service Date
Pay | Resend	8/12/2025	15184	Invoice	Installation	$475.00	$475.00		
Pay | Resend	4/10/2025	10748	Invoice	Installation	$465.00	$264.00		
Pay | Resend	8/13/2025	15231	Invoice	Residential Cleaning	$198.60	$198.60		
Pay | Resend	4/9/2025	10715	Invoice	Installation	$20.00	$20.00		4/11/2025
					$1,158.60	$957.60		

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.

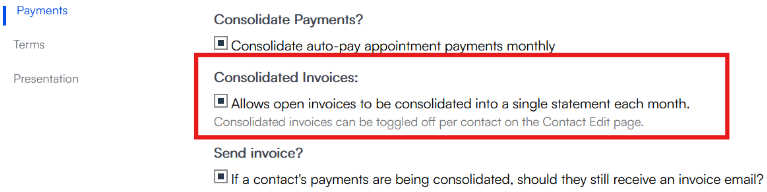
Schedule

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.

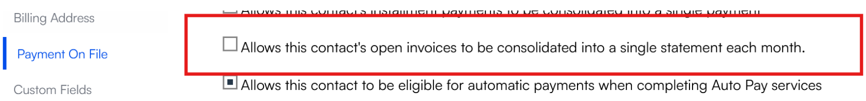
Consolidated Invoice Statements

When Consolidated Payments is enabled, you can choose to send clients**one consolidated invoice per billing cycle** instead of an individual invoice for each appointment.

- **Enable at the organization level:** Go to **Control Panel > Invoice Settings > Payments**and select the **Consolidated Invoices** checkbox (requires Consolidate Payments to be enabled).



- **Opt-out at the contact level:** From the **Contact Detail > Payment on File** section, you can turn off consolidated invoices for specific accounts.

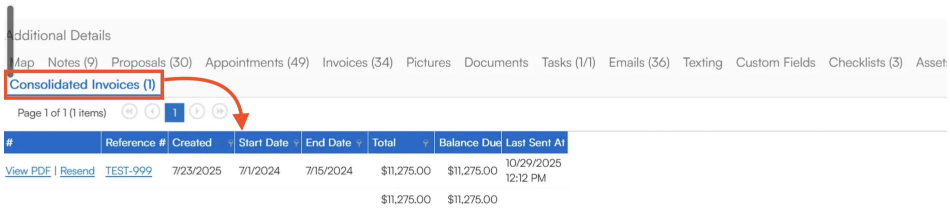


Each consolidated invoice is generated on the scheduled payment date. It includes all open invoices for the billing period with:

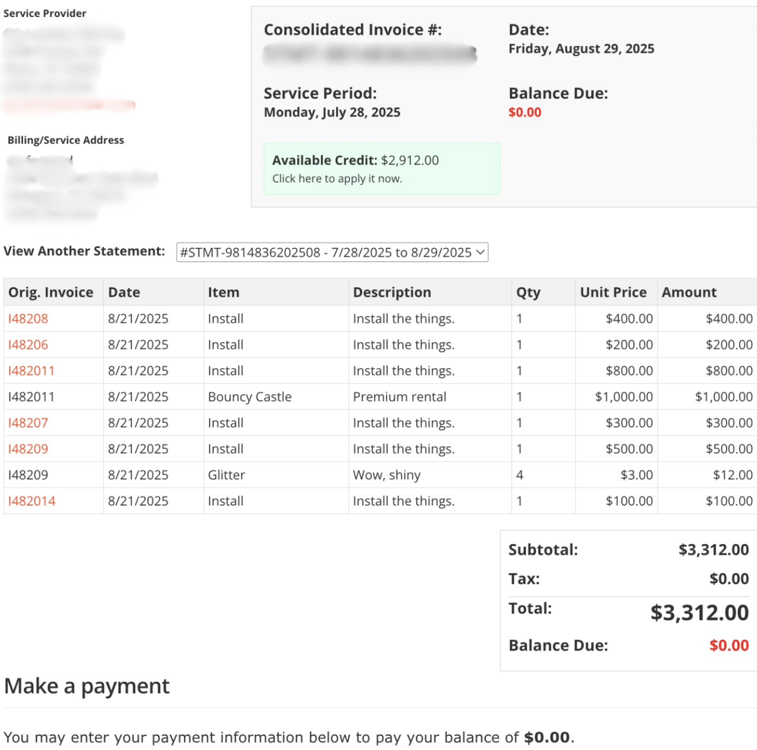
- Original invoice numbers, services, descriptions, and dates
- Full itemized breakdown and credits applied
- Account total due, payment status, and terms

Statements are:

- **Emailed automatically** to the primary contact and any CCs using the automated email template titled "Statement Ready Notification"
  - They will be emailed on the day of the month that is entered into the Consolidated Payments Day.
  - If Consolidated Payments are not set up, no payment will be charged but the invoice statement will still be sent.
  - Emails will include a link to view the statement on the web as well as a PDF copy of the statement for download.
- **Stored in the contact record** under the **Additional Details** section in the **Consolidated Statements tab.** for re-download or resend by period (MM/YYYY)



  - When viewing a statement, select a different date range using the "View Another Statement" dropdown menu to quickly navigate between statements.


Service Provider

Billing/Service Address

Consolidated Invoice #:

Date:
Friday, August 29, 2025

Service Period:
Monday, July 28, 2025

Balance Due:
$0.00

Available Credit: $2,912.00
Click here to apply it now.

View Another Statement: #STMT-9814836202508 - 7/28/2025 to 8/29/2025

Orig. Invoice	Date	Item	Description	Qty	Unit Price	Amount
I48208	8/21/2025	Install	Install the things.	1	$400.00	$400.00
I48206	8/21/2025	Install	Install the things.	1	$200.00	$200.00
I482011	8/21/2025	Install	Install the things.	1	$800.00	$800.00
I482011	8/21/2025	Bouncy Castle	Premium rental	1	$1,000.00	$1,000.00
I48207	8/21/2025	Install	Install the things.	1	$300.00	$300.00
I48209	8/21/2025	Install	Install the things.	1	$500.00	$500.00
I48209	8/21/2025	Glitter	Wow, shiny	4	$3.00	$12.00
I482014	8/21/2025	Install	Install the things.	1	$100.00	$100.00

Subtotal:	$3,312.00
Tax:	$0.00
Total:	$3,312.00
Balance Due:	$0.00

Make a payment

You may enter your payment information below to pay your balance of **$0.00**.

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.

Will historical invoices be backfilled into statements with Consolidated Invoicing?

No. Consolidated invoicing begins after your organization enables it. Past invoices remain as-is.