

CITK

Auto Payments in Recurring Templates



Introducing Auto Payments in Recurring Templates: A Streamlined Solution for Billing

Managing customer payments can be a daunting task, especially when it comes to recurring invoices. But worry no more! With the auto payment feature in our recurring templates, you can ensure timely payments without the hassle of waiting for your customers to take action.

This innovative feature allows you to automatically deduct the invoice amount from your customer's credit card on the due date.

What does auto payment in a recurring template mean?

Auto payments in recurring templates mean you don't have to wait for the customer to pay your invoice on time. The setting automatically deducts the invoice amount on the due date using the customer's credit card.

The card which must be used to deduct the auto payments on the invoice due date can be defined as

- **Customer card** - Allows to automatically charge the customer on the same card which is used to make the first payment for the recurring template
- **Saved card** - If any saved cards exist for the end customer, locations can use that card to automatically charge the end customer on every due date for the recurring template
- **New Card** - Locations can also enter new card details to charge the customer on that specific card whenever an invoice is due in the recurring template

How to automatically charge the client?

Auto payments can be enabled on the recurring template while scheduling the template, as shown below.

The screenshot shows a web interface for scheduling an invoice. At the top, a header bar contains a 'Back' button, the text 'iPad invoice for Conor', and a status 'Recurring every 1 months, starting Aug 1, 2022'. To the right of the header are 'Edit', 'Save', and 'Schedule' buttons. A modal window titled 'Schedule Invoice' is open. It has three radio buttons for contact method: 'Email & text' (selected), 'Email', and 'Text'. Below these are fields for 'Email Address: adamjenson711@gmail.com' and 'Mobile Number: +420 845 541 4731', with an 'Additional options' link. On the right side of the modal, there is a toggle for 'Enable auto payment' which is turned on. Below this is a field for 'Amount to be paid' set to '\$ 650'. Further down are three radio buttons for payment method: 'Customer card' (selected), 'Saved cards', and 'New card'. A note states: 'Invoices will be auto-charged using the same credit card which is used to pay for the first invoice', with a 'Learn more about this' link. At the bottom of the modal are 'Cancel' and 'Schedule' buttons. The background shows a partial view of a company card for 'CONGOBONGO' with contact information: '+17066806272', '272 Elan view Lane', 'San Jose, CA', '95035', and a 'miro' logo.

What does Customer Card mean here?

This option allows location users to charge the end customer from the card the customer uses to make the first payment in the recurring template. This will become applicable from the immediate next occurrence of the invoice irrespective of the invoice which is paid (can be the first, second, or n-th invoice)

For reference, if the customer makes the payment for the first time on the 4th invoice without paying the first three invoices, then auto-payment using that card would start from the 5th occurrence of the recurring template(if it exists)

How will I get notified of auto payments?

- Notification will be sent to the location user and the end customer upon every success/failure instance of a child invoice in the recurring template.
- The end customer will also be notified before deducting the charge automatically. This notification will be sent "x" days in advance, defined in the recurring setting frequency.
- The payment will not be processed automatically if any child invoice is updated before deducting the auto-charge. The location user would be informed of the same via mail, and they should share the updated invoice with the end customer to avoid any lost recurring revenue.

Case	Who should receive the email?
Auto payment failed	Receiver
Auto payment failed	Sender
Invoice payment success	Sender
Invoice payment success	Receiver
Auto-payment information	Receiver
Child invoice updated	Receiver

What happens if auto-payment fails?

- In case of auto-payment failure from the defined card, the end customer and invoice sender would be notified via mail.
- Suppose the end customer successfully pays via the same card or a new card upon notification. In that case, the new card will be updated to deduct auto-payment for all future occurrences.
- Else the payment would be retried two more times, after 24 hours gap of each try, for attempting to process the payment for the invoice. If the payment has not been processed, no further attempt would be made for this instance automatically, and the customer would be required to pay the invoice manually.

How many times will payment be retried in case of failure?

In case of failure in deducting the charge automatically from the defined card, two auto retry attempts would be made after 24 hrs each from the first failure. If the payment is still not processed, the end customer must pay manually for the invoice. to pay for the invoice manually

What does automatically charging a saved card mean?

This option allows location users to charge the end customer using one of the saved cards with the location user. Starting from the first occurrence, this would deduct the invoice amount from the selected saved card starting from the first occurrence.

Any failure to charge the amount from the saved card would notify the location user and the end customer. The saved card is not authorized while scheduling the template.

What does automatically charging a new card mean?

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This option allows location users to charge the end customer using new card details entered by the location user. Starting from the first occurrence, this would deduct the invoice amount from the desired card.

Any failure to charge the amount from the selected card would notify the location user and the end customer. Any chosen new card would be authorized with the minimum charge amount in the respective currency while scheduling the template.

Any card successfully added will also be saved for future purposes for the location user.

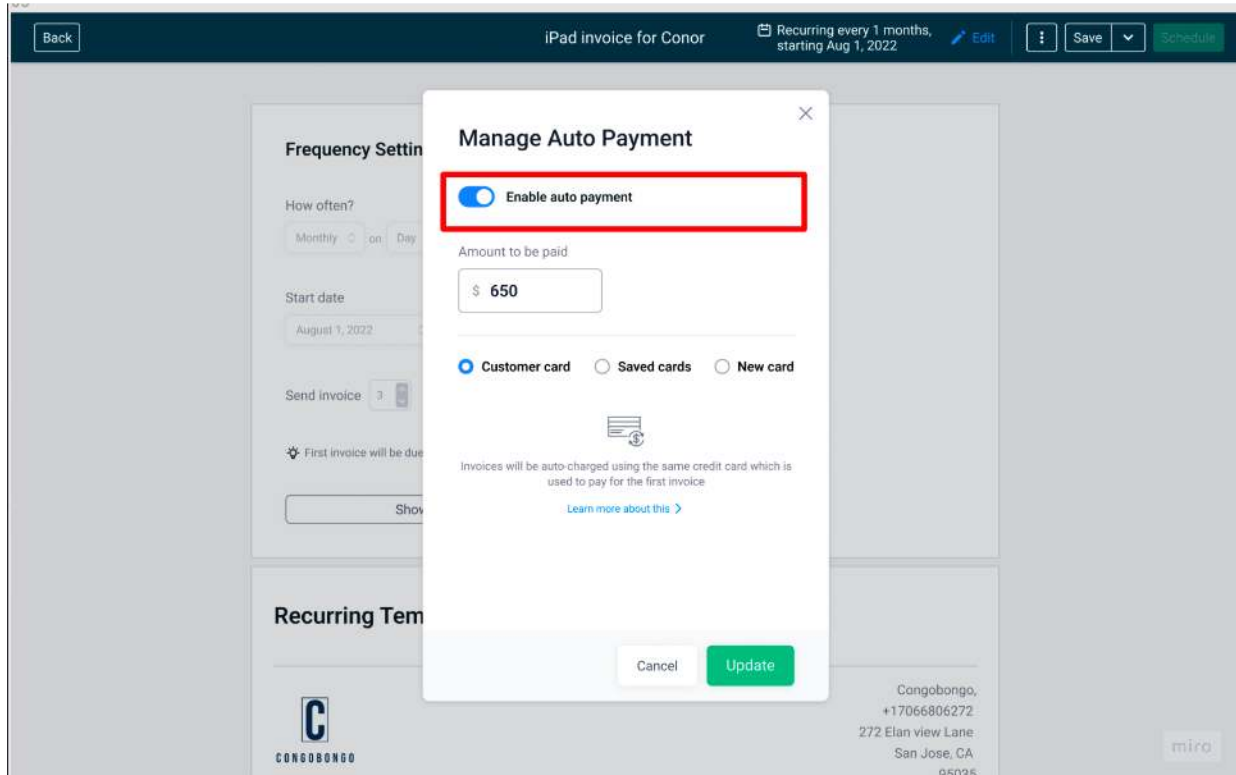
How to end auto-payments on a recurring template?

Auto-payments can be ended on an ongoing recurring template by selecting the Manage Auto-payments option from the invoice builder, as shown below.

The screenshot shows the iPad invoice builder interface. At the top, there's a header bar with a 'Back' button, the title 'iPad invoice for Conor', and a status 'Recurring every 1 months, starting Aug 1, 2022'. There are also 'Edit', 'Save', and 'Schedule' buttons. The main content area is divided into two sections: 'Frequency Settings' and 'Recurring Template'. The 'Frequency Settings' section includes fields for 'How often?' (Monthly, on Day 1st, of every 1 month(s)), 'Start date' (August 1, 2022), 'End date' (Never ends), and 'Send invoice' (3 Days in advance). A note states: 'First invoice will be due on August 1, 2022 and will be sent on July 29, 2022'. There is a 'Show invoice history' button. The 'Recurring Template' section shows the Congobongo logo and contact information: Congobongo, +17066806272, 272 Elan view Lane, San Jose, CA, 95035. A dropdown menu is open from the top right, showing three options: 'Preview' (Get a preview of the invoice), 'Manage Auto Payment' (Manage auto payments and card info on this template), and 'End Recurring Invoice' (Stop future recurring and end this invoice). The 'Manage Auto Payment' option is highlighted with a red box.

This will open the Auto-payment scheduling modal with the toggle turned ON and the payment option selected. The location user can turn the toggle off to disable auto-payments from the next occurrence.

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Can I turn on auto payments in an ongoing recurring template?

Yes, auto-payments can be turned ON on an ongoing recurring template using the manage auto-payments option in the builder.

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The screenshot shows the 'iPad invoice for Conor' interface. At the top, it indicates 'Recurring every 1 months, starting Aug 1, 2022'. The main section is titled 'Frequency Settings' and includes fields for 'How often?' (Monthly on Day 1st of every 1 month(s)), 'Start date' (August 1, 2022), 'End date' (Never ends), and 'Send invoice' (3 Days in advance). A note states: 'First invoice will be due on August 1, 2022 and will be sent on July 29, 2022'. Below this is a 'Show invoice history' button. The bottom section is titled 'Recurring Template' and displays the Congobongo logo and contact information: Congobongo, +17066806272, 272 Elan view Lane, San Jose, CA 95035. A menu is open on the right with three options: 'Preview' (Get a preview of the invoice), 'Manage Auto Payment' (Manage auto payments and card info on this template), and 'End Recurring Invoice' (Stop future recurring and end this invoice). The 'Manage Auto Payment' option is highlighted with a red box.

This will open the auto-payment modal with the toggle turned off. The location user can turn the toggle on and select the desired payment option from the customer, saved or new card.