

How to Setup or Update Auto Draft:

Sign into the account. If the account is not already scheduled to auto draft the total for the year will appear under **Unscheduled Dues**. If they are already scheduled, this amount will be \$0.00.

Christ Church
Active, First Joined: 1/31/16 @12:00pm
Last Reactivated: 8/17/20 @6:55am
\$ 186.00 / quarterly on 04/01/2022 by Invoice
Discounts: NONE
Web User: [Redacted] (Reset Password)
(Assign Web User)

Current Due: 0.00
Unscheduled Dues: 670.00

Invoices | **Methods** | Programs | Donations | Journal | Add Fee / Credit

TO SETUP A NEW AUTO DRAFT

1. Click on the Methods Tab
2. Click +Add New Payment Method

Association Wide - Two Plus UID: 807793

Account | Invoices | **Payment Methods** | Programs | Unpaid | Journal | Scheduling

+ Add New Method

3. Enter the Name and Billing Address for the payment method and select the payment method

New Payment Method ✕

First Name * Last Name *

Billing Address *

City * State * Zip *

Payment Method *

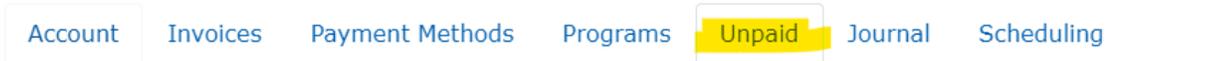
Please select a payment method

Use for membership auto draft
 Update scheduled program payments to draft from this method

*Choose one of the following:

- **Credit Card** (any major credit card or debit card)
- **e-Check / EFT / ACH** (personal checking account – must enter routing and account number- will be drafted as an Electronic Funds Transfer (EFT))
- **SAS Payment (FSA / Dependent Care Included)** – Preferred for all SAS payments. But **MUST** be used if drafting from a dependent care card or FSA account.

4. Check the box "Update scheduled program payments to draft from this method"
5. SAVE
6. Click on the Unpaid Tab



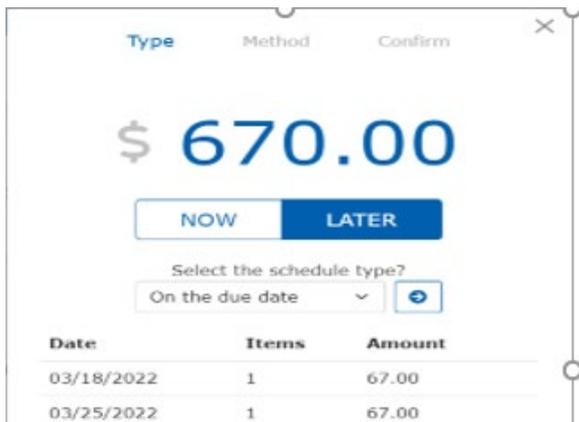
7. Under the Unpaid Items, click on boxes next to the session dates to be scheduled to draft, or click on the box next to All, this will select All sessions.



8. Click on Pay Selected



9. The draft scheduler will appear:

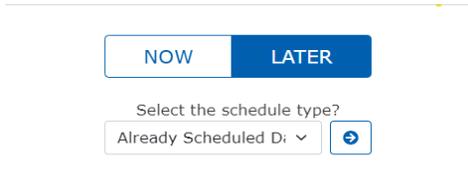


10. The default will be "on the due date" – to draft on the due date click on the 

11. For other options - Click the down arrow next to "on the due date". Choose from:

- a. **Already Scheduled Date** (**choose this when updating the card or payment method**)
- b. **Weekly payment** (allow to select day of week to draft)
- c. **Bi-weekly** (every other week)
- d. **Monthly payments** (will draft on the 1st of every month)

12. Once the draft frequency has been selected click on the 



13. Select the payment method to be set up on auto draft by clicking on the down arrow



14. Click Continue

15. A summary will appear. Verify the payment method and the draft frequency. If all is correct, Click Submit

\$ 670.00

Make sure the information is correct before submitting

- Payment method will be **Visa *8004**
- Payments will be scheduled **on due date** per the schedule below

Submit

Date	Items	Amount
03/18/2022	1	67.00
03/25/2022	1	67.00
04/01/2022	1	67.00
04/08/2022	1	67.00

TO UPDATE YOUR EXISITING DRAFT ON A NEW PAYMENT METHOD

Sign into the account. If already scheduled, this amount will be \$0.00.

Unit Info (UID: 6161006) Unit Actions

Non Member ⓘ

📍 Clarksville Area **Current Due**
0.00

😊 Active. First Joined: 6/7/24 @7:16pm

💰 \$ 0.00 / monthly on 07/01/2024 by **Invoice**

— Discounts: NONE

🔑 Web User: [redacted]@gmail.com (Reset Password) **Unscheduled Dues**
0.00

Invoices

Methods

Programs

Donations

Journal

Add Fee / Credit

TO UPDATE AUTO WITH A NEW PAYMENT METHOD

- 16. Click on the Methods Tab
- 17. Click +Add New Payment Method

Association Wide - Two Plus UID: 807793

Account Invoices **Payment Methods** Programs Unpaid Journal Scheduling

+ Add New Method

18. Enter the Name and Billing Address for the payment method and select the payment method

New Payment Method ✕

First Name * Last Name *

Billing Address *

City * State * Zip *

Payment Method *

Please select a payment method

Use for membership auto draft

Update scheduled program payments to draft from this method

Close Save

*Choose one of the following:

- **Credit Card** (any major credit card or debit card)
- **e-Check / EFT / ACH** (personal checking account – must enter routing and account number- will be drafted as an Electronic Funds Transfer (EFT))
- **SAS Payment (FSA / Dependent Care Included)** – Preferred for all SAS payments. But **MUST** be used if drafting from a dependent care card or FSA account.

19. **Check the box "Update scheduled program payments to draft from this method ***Failure to check this box will result in old account continuing to draft***"**

20. SAVE