

Setup Scheduled Payments

- **Setup Scheduled Payments** will walk users through setting up a scheduled payment based on a frequency of choice.
- If there are no properties or payment methods established for the profile, users can add them by clicking on the links shown below.

Payment

Select a Property:

Please add a Property First ▼

[+ Add a Property](#)

Select a Payment Method:

Please add a Payment Method First ▼

[+ Add a Payment Method](#)

- The payment type will automatically default to the **Scheduled Payment** tab, however, users may toggle between **Scheduled Payment** and **One Time Payment**. Users can make a scheduled payment on a monthly, quarterly, semi-annual or annual basis.
- The **End Date** defaults to *No End Date*, however, users have the ability to establish an end date.

The screenshot shows a web form for setting up a scheduled payment. At the top, there are two tabs: "One Time Payment" and "Scheduled Payment", with "Scheduled Payment" being the active tab. Below the tabs, there is a radio button labeled "Fixed Amount \$" which is selected. To its right is a text input field containing "\$0.00". Below this field is a paragraph of text: "Specify the dollar amount you authorize on the date selected. You acknowledge and agree that, your Association may update, however, is not required to update your payment amount when a new assessment fee is assigned by the Association. You are solely responsible for verifying and ensuring the payment amount is sufficient to keep your Property Account current." Below this text are two more input fields: "Fee per payment:" with a value of "\$0.00" and "Payment Total:" with a value of "\$0.00". Further down is a "Frequency:" dropdown menu currently set to "Monthly". At the bottom, there are two date pickers: "Date of First Payment:" set to "10/17/2018" and "End Date of Scheduled Payment (Optional):" set to "No end date". At the very bottom of the form are two buttons: "Cancel" and "Review Payment".

- Management Companies can set a predefined value for the following fields when a user is setting up a Scheduled Payment
 - Payment Amount
 - Payment Frequency
 - Date of First Payment
- If the Management Company charges an eCheck fee for Scheduled Payments, it will be displayed as "Fee Per Payment" under the Fixed Amount and is included in the Payment Total. This fee will be charged each time a payment is processed in the schedule.

- If the Payment Amount and/or Payment Frequency is predefined, the use will not be able to edit these field

Fixed Amount \$

Specify the dollar amount you authorize on the date selected. You acknowledge and agree that, your Association may update, however, is not required to update your payment amount when a new assessment fee is assigned by the Association. You are solely responsible for verifying and ensuring the payment amount is sufficient to keep your Property Account current.

Payment Total:

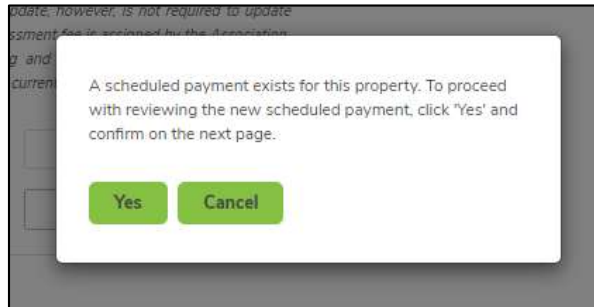
 Frequency:

- If the Date of First Payment is predefined, the user will only be able to start their payment on the predefined date

Payment Total:

 End Date of Scheduled Payment (Optional):

- If a recurring payment already exists for the chosen Property, a popup is displayed warning the user that completing the action may result in a duplicate payment. The user can either click *Cancel* and be routed back to the dashboard, or click *Yes* and proceed with the payment.



- Once the payment is reviewed and confirmed, it will be presented under **Scheduled Payments** on the **User Dashboard**.

Scheduled Payments				
Property	Next Payment Date	Frequency	Amount	
No Scheduled Payments				
Recent Payments				
Payment Date	Property	Amount	Status	Transaction #
No Recent Payments				
				All Payments History >