

# Payments > Autopay Batch

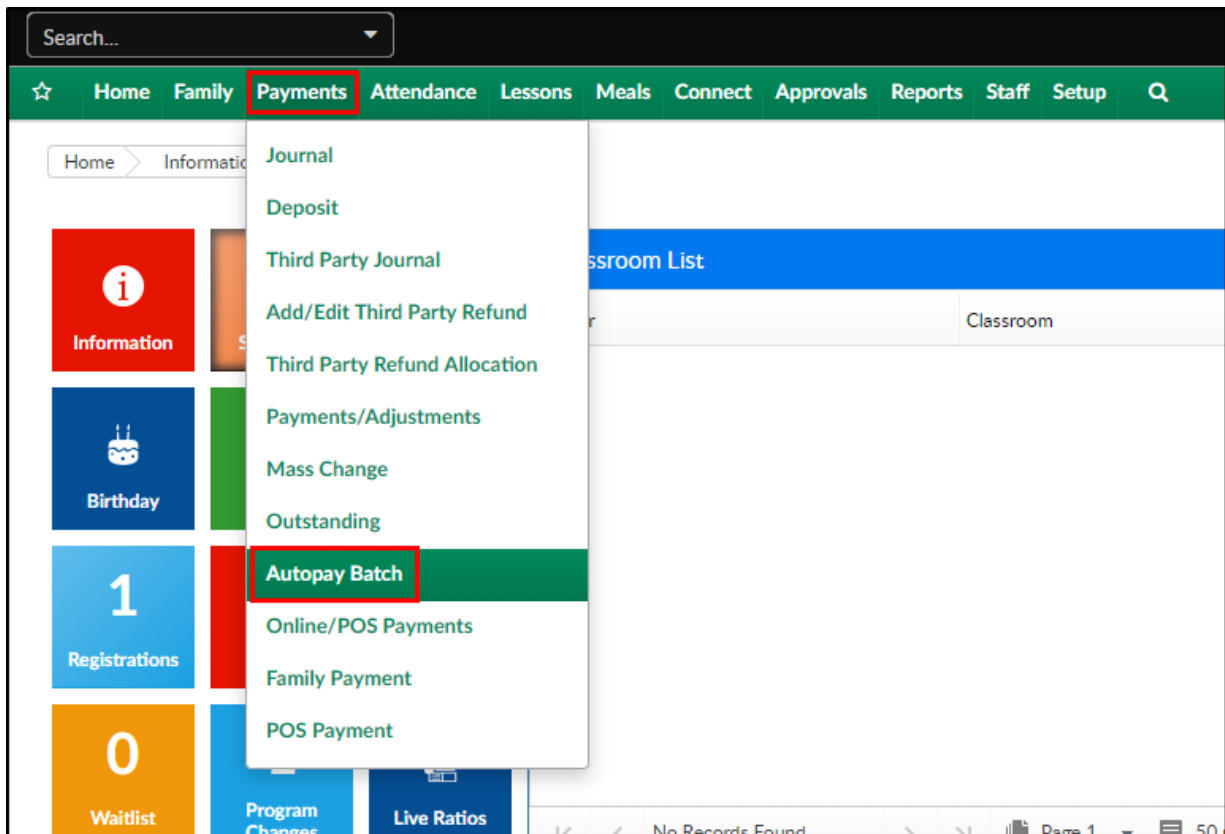
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Processing auto payments in the system allows administrators the ability to charge and collect money from parents that have an auto payment setup. Parents can add auto-pay information from the parent portal or administrators can add a payment method from the Auto-pay tab on the family record.

For auto payments to be processed, a payment gateway must be setup within the system (the site must be setup for credit card and/or ACH processing).

There are two ways the system processes auto-pays:

- Automated basis - the system will pickup and pay open balances according to the schedule setup/selected by parents or administrators (**Please note:** the autopay batch needs to be enabled on the back end, please contact [scwsupport@procaresoftware.com](mailto:scwsupport@procaresoftware.com) if you would like to setup automatic autopay)
- Variable/full amount basis - an administrator would go to the Payments > Autopay Batch screen to batch out payments



The Payments > Autopay Batch screen will only be used if a center manually batches out autopay payments.

1. Click the Search Criteria button to select search criteria

**Search Criteria** 🔍

Center:

Category:  Classroom:

Semester:

Reporting Group:  Balance Type:  Outstanding  Credit  Any

Statement ID:  Assigned Invoice Nbr:

Past Due:  Amount:

**View**

- Center
- Category
- Classroom
- Semester
- Reporting Group
- Balance Type
- Statement ID
- Assigned Invoice Nbr
- Past Due
- Amount

2. Click View

3. All families that match the selected search criteria with open balances will display. Check or Uncheck boxes to include or exclude them from the batch

- To edit the payment amount, double click the Charge Amount text and enter the value. Then push Tab

Outstanding Batch List			
<input type="checkbox"/>	Family	Balance Due	Charge Amount
<input checked="" type="checkbox"/>		186.00	186.00 <input type="text"/>
Total:		\$186.00	

4. Once families are selected, click Pay All Selected to charge the parent's auto-pay accounts on file

5. A confirmation box will display when the batch is completed

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## Reports

Reports can be pulled from the following screens:

- [Payments > Online/POS Payments](#)
- [Reports > Payment](#) - Select AutoPay Status Report, then click the blue number to open an Excel report

**Please Note:** this will trigger the auto-pay success or auto-pay failure templates to send. These templates can be edited by going to [Setup > System Config](#), then select the email option

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