

Automated Payment Status

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Overview

The **Automated Payment Status** page gives users the ability to:

- view the automated payment settings across all customers
- update these settings in bulk

The automated payment settings are part of the [automated payments module](#) and are used to decide if our system will act on your customer's account with regard to the automatic taking of a payment and by which payment method.

Viewing Automated Payment Settings

To view the automated payment settings across all customers, go to;

Finance > Accounts Receivable > Automated Payment Status

Home Customers Services Billing Packages and Plans Products Inventory Report Finance Events Commissions Service Desk Integration Admin									
Accounts Receivable Accounts Payable Securities Bulk Import Payment Plans Payment Commissions Manual Payment Batch Payment Imports View Defaults									
Receive Payment Invoice List Unallocated Transactions Pending Cardless Payments Disputes Credit Write off Refund Automated Payment Status									
Automated Payment Methods Status									
Account ID or Name (Partial Match): Search Clear									
Account Status: Select Update to: Enabled									
Payment Method: All Apply									
Payment Status: Select									
☐ Exclude Test Accounts									
213 Results Found									
Account ID	Account Name	Payment Method Modified	Failure Count	Default Payment Method	Credit Card Details Entered	Direct Debit Details Entered	Account Balance	Status	
133440	Joe Bloggs	2019-05-03 11:48:11	0	Direct Debit	No	Yes	16,357.33	Disabled	☐
154152	Emerson Test	2011-03-23 10:44:02	0	No Payment Method Selected	Yes	No	275.50	Disabled	☐
157454	Tilly Bloggs	2019-05-03 11:48:11	0	Direct Debit	No	Yes	1,523.40	Disabled	☐
159153	Test Person1	2018-10-29 14:18:04	0	Direct Debit	No	Yes	111.49	Disabled	☐
216957	Test Customer3	2018-10-29 14:18:04	0	Direct Debit	No	Yes	0.00	Disabled	☐
232038	Test Customer	2018-10-29 14:24:09	0	Direct Debit	No	Yes	561.00	Disabled	☐
276399	Kathy Black	2012-06-20 09:04:10	0	Credit Card	Yes	No	0.00	Disabled	☐
276676	Paul Test	2012-06-20 09:04:10	0	Credit Card	Yes	No	0.00	Disabled	☐
277085	Emma Maryman	2012-06-21 09:10:03	0	Credit Card	Yes	No	0.00	Disabled	☐
278951	Neil Blumby	2019-05-03 11:47:21	0	No Payment Method Selected	Yes	No	242.00	Disabled	☐
427862	Emma Test 123 Ltd	2020-02-25 16:14:12	3	Credit Card	Yes	No	147.00	Enabled	☐
466540	TH Test	2013-10-28 07:47:43	0	No Payment Method Selected	No	No	3,056.00	Disabled	☐
466578	Test Org 1 Pty Ltd	2020-02-25 16:14:13	3	Credit Card	Yes	No	963.99	Enabled	☐
756503	Fred Bloggs	2016-06-23 18:07:20	0	Direct Debit	No	Yes	1,833.00	Disabled	☐
906766	Test Person	2019-05-03 11:48:11	0	Credit Card	No	No	561.36	Disabled	☐
961489	Signup Test User	2014-07-16 16:32:40	0	Credit Card	Yes	No	0.00	Disabled	☐
1031823	Joe Bloggs	2019-05-03 11:50:00	0	Direct Debit	No	No	5,093.70	Suspended	☐
1124540		2014-11-26 11:11:05	0	No Payment Method Selected	No	No	0.00	Disabled	☐
1124765	Agent Smarts	2014-11-26 15:03:23	0	No Payment Method Selected	No	No	308.00	Disabled	☐
1126054		2014-12-01 09:21:55	0	No Payment Method Selected	No	No	0.00	Disabled	☐
1 2 3 4 5 ... 11 >									
50 100 150 200 500 1000									

Update Customer Payment Settings in Bulk

Use the search filters up the top of the screen to find the customers whose automated payment settings are to be updated.

On the right column of the cumulus list, is a column with tick boxes.

Select each record independently, or tick the header to select them all.

In the **Update To** field, choose which action to take.

Receive Payment Invoice List Unallocated Transactions Pending Cardless Payments Disputes Credit Write off Refund Automated Payment Status									
Automated Payment Methods Status									
Account ID or Name (Partial Match): Search Clear									
Account Status: Select									
Payment Method: All									
Payment Status: Select									
☐ Exclude Test Accounts									
213 Results Found									
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1 2 3 4 5 ... 11 >									
50 100 150 200 500 1000									

When you are ready, press **Apply**.

Confirm the change or cancel.

Related Pages

- [Configure a Payment Method](#)
- [Automated Payment Status](#)
- [AusPost Scan and Pay](#)
- [Show Pay by Cheque](#)
- [Payment Methods](#)
- [Virtual Bank Account](#)
- [Event: Manual Payment Received](#)
- [Emersion Payment Import](#)
- [Bulk Import Payment ABA File](#)
- [Show Due Date when Direct Debit Enabled](#)
- [Event: Payment Plan Completed](#)
- [Event: Payment Plan Cancelled](#)
- [Event: Payment Plan Created](#)
- [Event: Payment Plan Transaction Failed](#)
- [Setup Netsuite Payment Accounts](#)