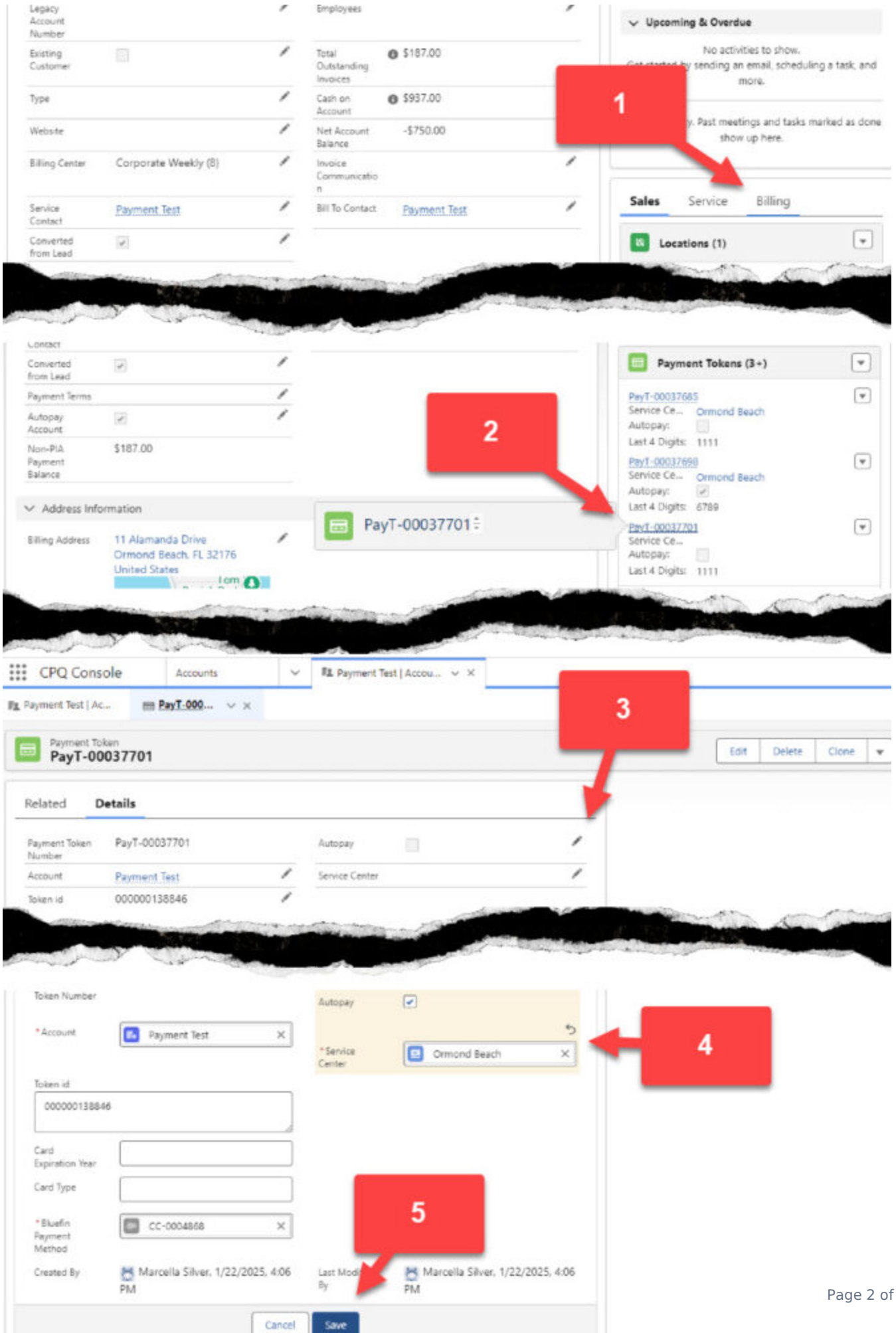
QRG PAY.3 – Adding a Saved Token to Autopay

Quick Reference Guides · https://milo.masseyservices.com/docs/qrg-pay-3-adding-a-saved-token-to-autopay/

Adding a Saved Token to Autopay

1. From the customer's account, select the Billing tab
2. Click on the Payment Token the customer wants to add to autopay
3. Edit the token by clicking on the pencil
4. Check the box next to Autopay and select the Service Center that will be added to autopay.
5. Save the changes.


Legacy Account Number
Existing Customer
Type
Website
Billing Center
Corporate Weekly (8)
Service Contact
Payment Test
Converted from Lead
Employees
Total Outstanding Invoices
$187.00
Cash on Account
$937.00
Net Account Balance
-$750.00
Invoice Communication
Bill To Contact
Payment Test
Upcoming & Overdue
No activities to show.
Past meetings and tasks marked as done show up here.
1
Sales
Service
Billing
Locations (1)
Converted from Lead
Payment Terms
Autopay Account
Non-PIA Payment Balance
$187.00
Address Information
Billing Address
11 Alamanda Drive
Ormond Beach, FL 32176
United States
2
PayT-00037701
Payment Tokens (3+)
PayT-00037685
Service Ce...
Ormond Beach
Autopay:
Last 4 Digits: 1111
PayT-00037690
Service Ce...
Ormond Beach
Autopay:
Last 4 Digits: 6789
PayT-00037701
Service Ce...
Autopay:
Last 4 Digits: 1111
CPQ Console
Accounts
Payment Test | Accou...
Payment Test | Ac...
PayT-000...
3
Payment Token
PayT-00037701
Edit
Delete
Clone
Related
Details
Payment Token Number
PayT-00037701
Account
Payment Test
Token id
000000138846
Autopay
Service Center
Token Number
*Account
Payment Test
Autopay
*Service Center
Ormond Beach
4
Token id
000000138846
Card Expiration Year
Card Type
*Bluefin Payment Method
CC-0004868
5
Created By
Marcella Silver, 1/22/2025, 4:06 PM
Last Modified By
Marcella Silver, 1/22/2025, 4:06 PM
Cancel
Save

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