

# QRG PAY.2 - Adding an Account to Autopay

## Adding an account to autopay

1. Search and Click on the account you wish to add autopay to from the account screen
2. Edit the customer home screen by clicking on any pencil
3. Check the box next to Autopay Account
4. Click Save

The screenshot shows the CPQ Console interface. At the top, there's a navigation bar with 'CPQ Console' and 'Accounts'. Below that, a 'Recently Viewed' section shows a list of accounts. A red callout '1' points to the first account, 'Payment Test'. Below the list, a detailed view of an account is shown. A red callout '2' points to a pencil icon in the 'Payment Terms' section. A red callout '3' points to the 'Autopay Account' checkbox, which is checked. A red callout '4' points to the 'Save' button at the bottom of the form. The form includes fields for 'Billing Address', 'Billing City', 'Billing State/Province', 'Billing Zip/Postal Code', and 'Billing Country'. The 'Autopay Account' checkbox is checked, and the 'Non-PIA Payment Balance' is \$187.00. The 'Address Information' section is expanded, showing the 'Billing Address' field with '11 Alamanda Drive' entered. The 'Billing City' is 'Ormond Beach', 'Billing State/Province' is 'FL', 'Billing Zip/Postal Code' is '32176', and 'Billing Country' is 'United State'. The 'Save' button is highlighted in blue.

Account Name	Type	Account Record T...	Phone	Account O...	Email
1 Payment Test	Residential	Person Account		msilver@	msilver@masseyservices.com
2 Payment Test 3	Residential	Person Account		msilver@	marceynelijah@gmail.com
3 Payment Test 2	Residential	Person Account		msilver@	marceynelijah@gmail.com
4 Marcella Silver	Residential	Person Account		msilver@	marceynelijah@gmail.com

Payment Terms

Autopay Account

Non-PIA Payment Balance \$187.00

11 Alamanda Drive, Ormond Beach FL

View All

Opportunities (3+)

Autopay Account

Non-PIA Payment Balance \$187.00

Address Information

Billing Address

Search Address

Billing Street 11 Alamanda Drive

Billing City Ormond Beach

Billing State/Province FL

Billing Zip/Postal Code 32176

Billing Country United State

Cancel Save

Quotes (3+)

Q-15509

Net Amount: \$627.00

Status: Accepted

Created By: Marcella Silver

Q-15510

Net Amount: \$858.00

Status: Accepted

Created By: Marcella Silver

Q-15518

Net Amount: \$858.00

Status: Accepted

Created By: Shravanti Patil

Orders (3+)

00128514

Status: Draft