

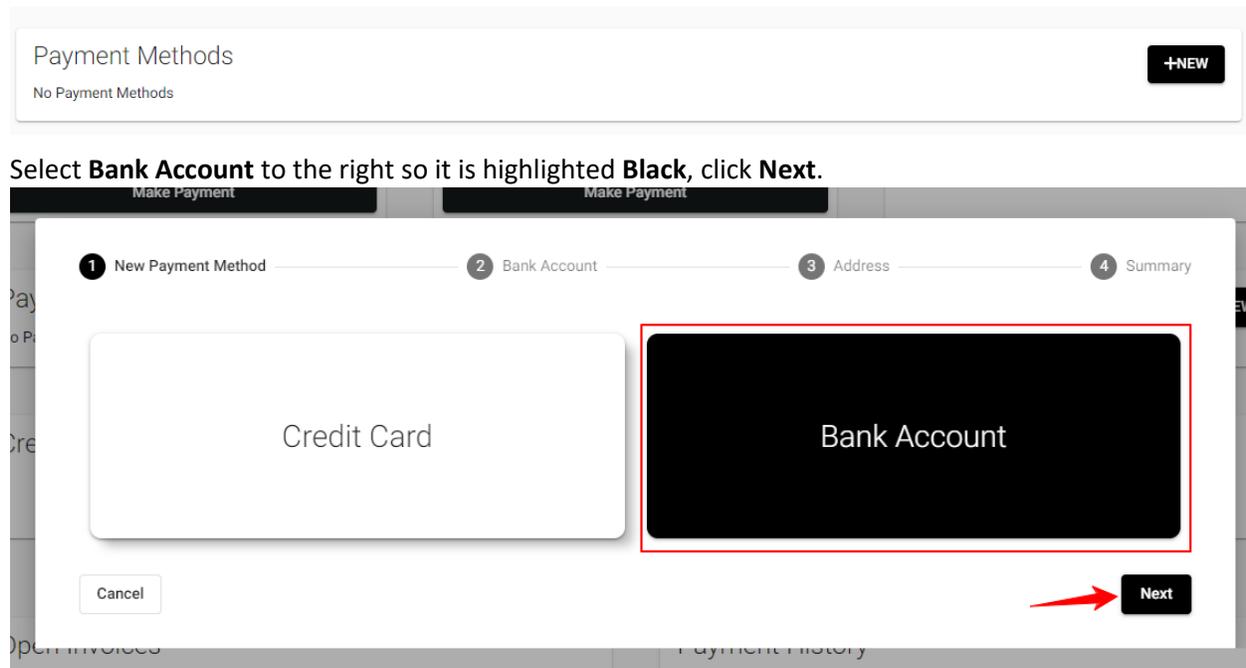
How to add a bank account for ACH payments to our Client Billing Portal

Go to <https://clearcomit.connectboosterportal.com/>

On your page, scroll down to Payment Options.

Set up your Payment Options –

If your bank info is not already listed on your account, click on the “**New +**” button.



The screenshot shows the 'Payment Methods' section of a client billing portal. At the top, there is a header 'Payment Methods' with a '+NEW' button on the right. Below this, it says 'No Payment Methods'. A progress bar indicates four steps: 1. New Payment Method, 2. Bank Account, 3. Address, and 4. Summary. The 'Bank Account' step is currently active. Two options are presented: 'Credit Card' and 'Bank Account'. The 'Bank Account' option is highlighted with a black background and a red border. A red arrow points to the 'Next' button at the bottom right of the selection area. A 'Cancel' button is also visible at the bottom left.

Information you'll need to have on hand:

Bank Name

The name used on the account (Account Name)

Routing Number

Account Number

Fill out the form on the page with the information for your account.

Under “Friendly Name” this is the nickname for you to recognize this bank account as a payment method inside this billing portal (i.e. Company Bank ACH). Choose whatever you'd like. Click **Next**.

Add the routing and account numbers, select the account types (Business/Personal – Checking/Savings). Click the **Next** button.

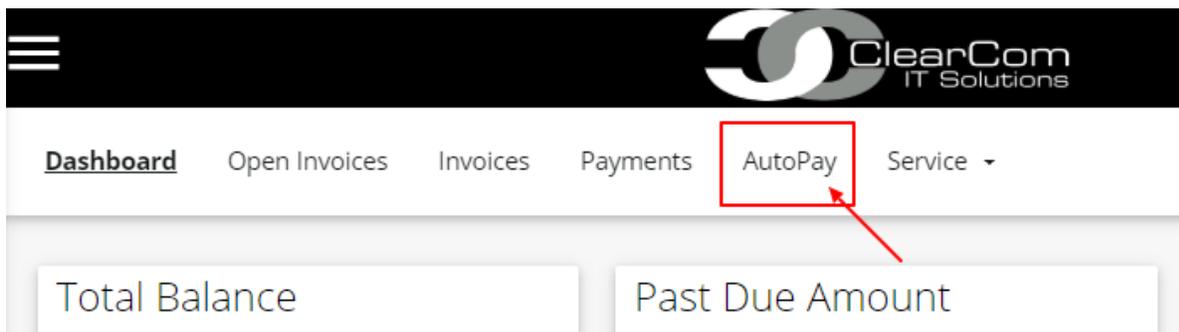
Add the Account Holder (you or your company) address, phone number and email address. Click Next.

On the next page, confirm the information is correct, check the box to authorize this payment method and then click the SUBMIT button.

You can now use this account to easily pay your invoices with just a click of a button. No need to write out paper checks or go to the post office to mail them out.

Save even more time by setting up auto payments for your invoices!

Click on the AutoPay button on your dashboard



Click “CREATE AUTOPAY” or “NEW” button.

Under **Payment Methods** (1), select the Bank Account you just set up.

A screenshot of the 'AutoPay when the balance is more than \$1.00' configuration form. The form contains several fields and buttons. The 'Payment Methods' dropdown menu is highlighted with a red rectangular box, and a red number '1' is placed to its right. Below it, the 'Autopay Type' dropdown is set to 'the balance'. The 'Criteria' dropdown is set to 'is more than'. On the right side, the 'Run AutoPay' dropdown is set to 'On Due Date', and the 'the balance' input field contains '1.00'. At the bottom right, there are two buttons: a red 'Delete' button and a green 'Save' button. A red arrow points to the 'Save' button.

Under **Autopay Type**, If you would like to only pay your monthly contracted amount, select “the term”. In the next field, leave as “is any of the following”. Under **Term**, Select the checkbox next to AUTOPAY.

The screenshot shows the configuration for an AutoPay rule titled "AutoPay when the term is any of the following: 'AUTOPAY'". The "Payment Methods" dropdown is set to "Santander". The "Autopay Type" dropdown is set to "the term". The "Criteria" dropdown is set to "is any of the following:". A list of criteria is shown below, with "AUTOPAY" selected and checked. The "Run AutoPay" dropdown is set to "On Due Date". At the bottom, there are "Advanced" and "Undo Changes" buttons on the left, and "Delete" and "Save" buttons on the right. A red arrow points to the "Save" button.

Click on the “**Save**” button to save your AutoPay settings.

If you would like to auto pay every invoice, select “the balance” under the Autopay Type.

In the next field select “is more than” and in the next field for the balance put 1.00. Any balance greater than \$1 will be auto paid.

The screenshot shows the configuration for an AutoPay rule titled "AutoPay when the balance is more than \$1.00". The "Payment Methods" dropdown is set to "Santander". The "Autopay Type" dropdown is set to "the balance". The "Criteria" dropdown is set to "is more than". The "Run AutoPay" dropdown is set to "On Due Date". The "the balance" field has "1.00" entered. At the bottom, there are "Advanced" and "Undo Changes" buttons on the left, and "Delete" and "Save" buttons on the right. A red arrow points to the "Save" button.

Don't forget to click the **Save** button when done.