



Invoiced Payment Plans

Converting an Invoice Payment Plan to an Automatic Plan

Customers can convert an Active or Pending invoice payment plan to an automatic plan online through their user account. Institution users and FACTS users cannot convert the agreement on the customer's behalf. Customers will not be able to convert an automatic plan to an invoice plan even if their plan was originally set up as invoice.

Finding the link

The customer will begin by clicking the link in the Financial Account section of their user account. This link is also available from the Make a Payment screen.

Home | My Profile | Financial Accounts | Sign Out

Home > Sample Academy Summary

Sample Academy 2014-2015 LIVE HELP

Payment Plan & Billing - For Bart Smith FACTS Returned Payment Fee Policy

Amount Due: \$3,093.00 Make a Payment Mail in Payment Customer # 603621 - Bart Smith

Status	Term	Activity	Financial Account	Remaining Amount Due
Active Past Due	2014-2015	Payment Plan (101 028 837)	Set up Automatic Payments	\$3,093.00

Activity Details

Schedule | Balance | Payments | Transactions | Correspondence | Changes | Deposits

Expand All | Collapse All

	Due Date	Term	Status	Description	Remaining Amount Due
<input type="checkbox"/>	01/20/2015	2014-2015	Open	Budgeted Invoice (53256)	\$365.80
<input type="checkbox"/>	02/20/2015	2014-2015	Open	Budgeted Invoice (56069)	\$909.10
<input type="checkbox"/>	03/20/2015	2014-2015	Scheduled	Budgeted Invoice	\$909.10
<input type="checkbox"/>	04/20/2015	2014-2015	Scheduled	Budgeted Invoice	\$909.00
Total					\$3,093.00

Adding a Financial Account

The options for adding an account are determined by what the institution offers – bank account or credit card. If the user had financial accounts stored they would be listed in the drop down menu.

Home | My Profile | Financial Accounts | Sign Out

Home > Sample Academy Summary > Set Up Automatic Payments 2014-2015

Sample Academy

Set Up Automatic Payments

1 Select Account
 2 Review & Authorize
 3 Confirmation

By converting your invoices to an automatic payment plan, your payments will be processed automatically for the remainder of your payment schedule.

Payment Method

Financial Account: -- Select -- ?

- Select --
- Add Credit Card --
- Add Bank Account --

Next
Cancel

A convenience fee may be assessed for payments made by credit card. The convenience fee amount will be disclosed once you select a payment method. Select your payment method to continue.

Past Due Payments and Future Payments

If there are past due payments, the user will need to select whether to pay the past due amount now or pay them later. If they select **Pay Later**, they are instructed to contact the institution to make arrangements for the past due amount. If the FACTS enrollment fee has not been paid, it will be processed as part of the conversion.

The future payments sections shows them when the remaining scheduled payments will be processed.

Home | My Profile | Financial Accounts | Sign Out

Home > Sample Academy Summary > Set Up Automatic Payments 2014-2015

Sample Academy

Set Up Automatic Payments

1 Select Account
 2 Review & Authorize
 3 Confirmation

By converting your invoices to an automatic payment plan, your payments will be processed automatically for the remainder of your payment schedule.

Payment Method

Financial Account: Wells Fargo - 0324 ?

Past Due Payments

Payment Date	Description	Amount
Tuesday, January 20, 2015	Past Due Payment	\$365.80
	Past Due Total	\$365.80

Please make a selection:

Pay Now - Your past due payments will be paid today

Pay Later - Your past due payments will be placed on hold

Selecting **Pay Later** will place the past due payments on hold. You will need to contact your institution to make arrangements for the payments on hold.

Future Payments

Payment Date	Description	Amount
Friday, February 20, 2015	Payment	\$909.10
Friday, March 20, 2015	Payment	\$909.10
Monday, April 20, 2015	Payment	\$909.00

Next
Cancel

Review and Authorize

The customer is given a chance to review the information and make changes as

needed. They must accept the terms & conditions and click Authorize to complete the conversion.

Home
My Profile
Financial Accounts
Sign Out

Home > Sample Academy Summary > Set Up Automatic Payments 2014-2015

Sample Academy

Set Up Automatic Payments

1 Select Account
2 Review & Authorize
3 Confirmation

By converting your invoices to an automatic payment plan, your payments will be processed automatically for the remainder of your payment schedule.

[FACTS Returned Payment Fee Policy](#)

<p style="margin: 0;">Remaining Amount</p> <p style="margin: 0; font-size: 1.2em; color: green;">\$3,093.00</p> <p style="margin: 0; font-size: x-small;">Payment Plan 101 028 837</p> <p style="margin: 0; font-size: x-small;">Payment Method Wells Fargo - 0324 (Change)</p>	<p style="margin: 0;"><input checked="" type="checkbox"/> I have read and accept the terms and conditions of this payment plan.</p> <p style="margin: 0; text-align: center;"> Back Authorize Cancel </p>
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Customer Information

Name/Address	Bart Smith 987 W Elk St Lincoln, NE 68501 USA	To provide you the best customer service possible, FACTS may contact you by any phone number associated with you, including cellular and mobile numbers. We may also contact you using automatic dialing systems, artificial or pre-recorded messages, text messages, or e-mails.
Phone	(402)476-1111	

Future Payments

Payment Date	Description	Amount
Friday, February 20, 2015	Payment	\$909.10
Friday, March 20, 2015	Payment	\$909.10
Monday, April 20, 2015	Payment	\$909.00

On Hold Payments

Payment Date	Description	Amount
Tuesday, January 20, 2015	On Hold Payment	\$365.80

Selecting **Pay Later** will place the past due payments on hold. You will need to contact your institution to make arrangements for the payments on hold. [Change](#)

Terms & Conditions

Full Terms & Conditions removed for display purposes

I have read and accept the terms and conditions of this payment plan.

Back
Authorize
Cancel

Confirmation

A confirmation page is displayed that can be printed. Institution users can view a copy of this page through the transaction history in the Customer Profile.

Sample Academy

Set Up Automatic Payments

- 1 Select Account 2 Review & Authorize 3 Confirmation

Your payment plan will be processed automatically for the remainder of your payment schedule. Any further changes will need to be authorized by your institution.

Payments will be automatically processed from the account below. Please print a copy of this page for your records.

<p>Payment Plan 101 028 837</p> <p>Remaining Amount \$3,093.00</p> <p>Wells Fargo - 0324</p>	<p><input checked="" type="checkbox"/> I have read and accept the terms and conditions of this payment plan. (Signed on 02/16/2015)</p> <p style="text-align: right;">Done Print</p>
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Customer Information

<p>Name/Address Bart Smith 987 W Elk St Lincoln, NE 68501 USA</p> <p>Phone (402)476-1111</p>	<p>To provide you the best customer service possible, FACTS may contact you by any phone number associated with you, including cellular and mobile numbers. We may also contact you using automatic dialing systems, artificial or pre-recorded messages, text messages, or e-mails.</p>
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Future Payments

Payment Date	Description	Amount
Friday, February 20, 2015	Payment	\$909.10
Friday, March 20, 2015	Payment	\$909.10
Monday, April 20, 2015	Payment	\$909.00

On Hold Payments

Payment Date	Description	Amount
Tuesday, January 20, 2015	On Hold Payment	\$365.80

You selected **Pay Later** to place the past due payments on hold. You will need to contact your institution to make arrangements for the payments on hold.

Terms & Conditions

Full Terms & Conditions removed for display purposes

I have read and accept the terms and conditions of this payment plan. (Signed on 02/16/2015)

Done **Print**

Viewing the Automatic Schedule

If the customer had past due payments and chose to Pay Later, their account will continue to show as past due. The past due payments will show as On Hold in their scheduled.

Home
My Profile
Financial Accounts
Sign Out

Home > Sample Academy Summary

Sample Academy 2014-2015

Payment Plan & Billing - For Bart Smith

FACTS Returned Payment Fee Policy

Amount Due: \$3,093.00

Make a Payment

Customer # 603621 - Bart Smith

Status	Term	Activity	Financial Account	Remaining Amount Due
! Active Past Due	2014-2015	Payment Plan (101 028 837)	Wells Fargo - 0324 Change	\$3,093.00

Activity Details

Schedule

Balance

Payments

Transactions

Correspondence

Changes

Deposits

[Expand All](#) | [Collapse All](#)

	Due Date	Term	Status	Description	Remaining Amount Due
<input type="checkbox"/>	01/20/2015	2014-2015	On Hold	Payment	\$365.80
<input type="checkbox"/>	02/20/2015	2014-2015	Scheduled	Payment	\$909.10
<input type="checkbox"/>	03/20/2015	2014-2015	Scheduled	Payment	\$909.10
<input type="checkbox"/>	04/20/2015	2014-2015	Scheduled	Payment	\$909.00
Total					\$3,093.00

Troubleshooting: Link Not Available

There are a few reasons why the ability to convert an invoice agreement to automatic may not be allowed.

1. The option is turned off at the term level, so no one will have access to the link
2. The customer is restricted from using ACH or Credit Card as a payment option
3. The institution is using all paper for sign up, no online options allowed
4. The payment plan status is Inactive, Terminated, or Completed
5. There are no scheduled payments left in the plan

Contact Us: 1-866-412-4637

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