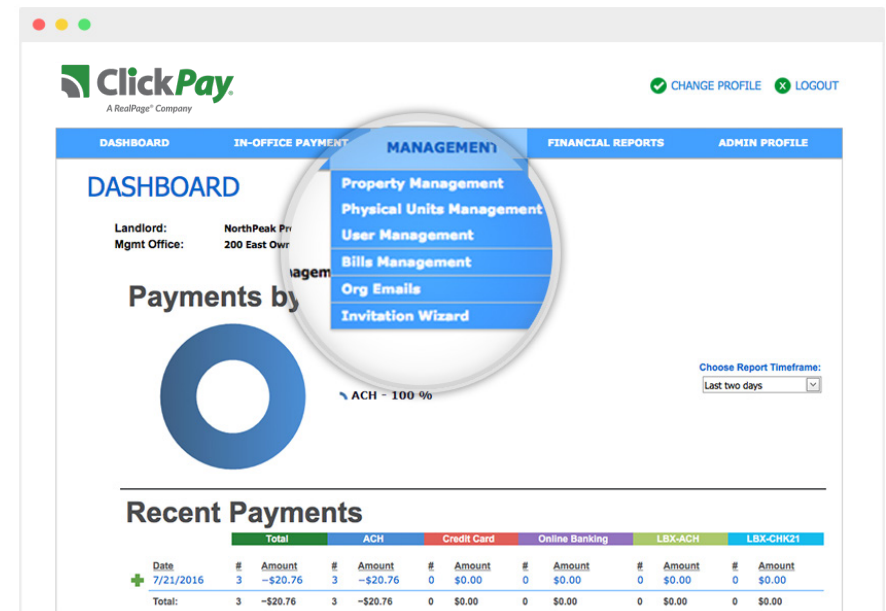# Introducing the Invitation Wizard

Maximize electronic payment adoption through one-click account access & automatic payment setup

Whether a walk-in to the management office or a move-in during the leasing process, the Invitation Wizard gives ClickPay administrators the ability to set up tenant, resident, or club member accounts as well as automatic recurring payments while providing one-click access in just a matter of seconds.

To get started, visit the **Management** tab in your dashboard & select the **Invitation Wizard** on the bottom.

Select a Unit

When locating a unit, you may search by:

- LLC
- Management Site
- Account Number
- Apartment Number

Once you find the correct unit, click the **green arrow** to the left of that unit. If you select the incorrect unit, you will have the option to go back on the next page.

Create a Profile

Complete the user profile and select from the following options:

INVITE ONLY: This option will have a ClickPay account created on behalf of the user. The invitee will receive a confirmation email with one-click access to their new account.

SETUP AUTOPAY: This option will both create a ClickPay account and set up automatic recurring payments on behalf of the user. The invitee will receive a confirmation email with one-click access to their new account.

CASH PAYMENT: Should this product be enabled for your portfolio, select this option to have an email invite sent to the resident with a separate email including specific instructions on how to make a payment by cash via MoneyGram.

When completed, select **CONTINUE**. If you selected **INVITE ONLY**, review the account details and select **SUBMIT** to send an invitation.
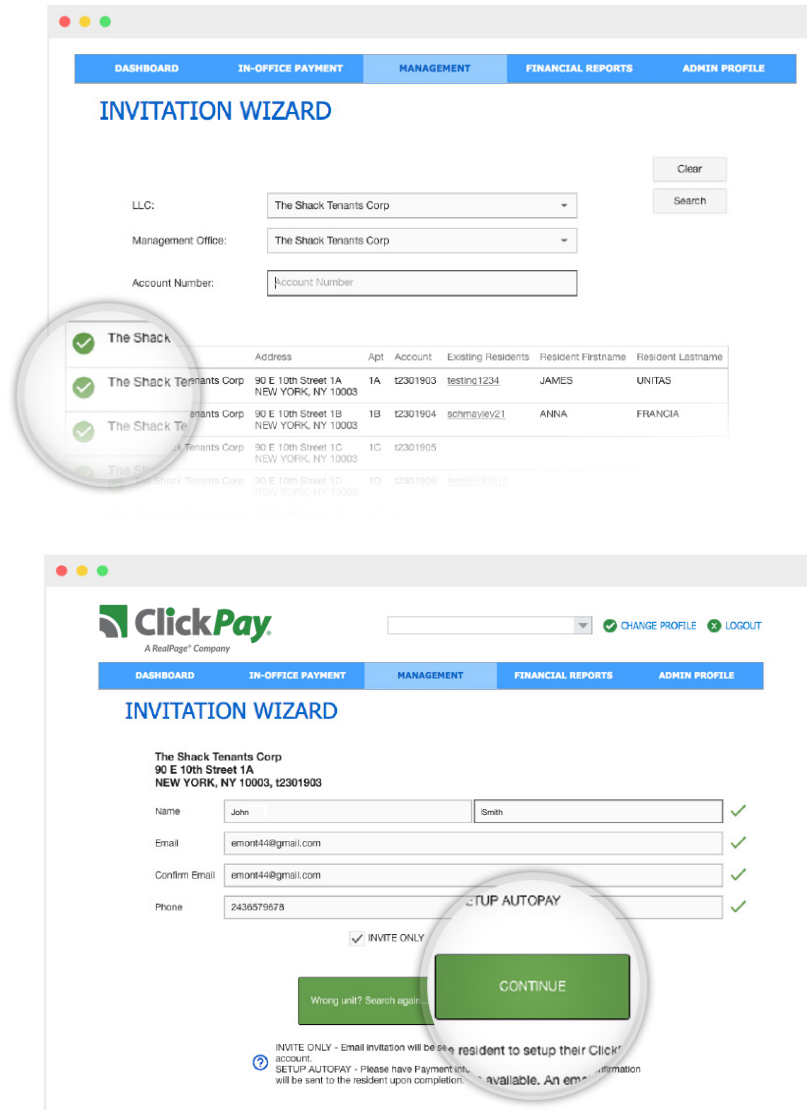
Set Up Automatic Payments

If you chose to set up automatic recurring payments on behalf of the user, you will be brought to the payment selection page.

Select the payment option* & enter the banking information provided. You will then be required to select the following details:

- **Starts on**: Select the date of the first automatic payment

- **Frequency**: How often the automatic payment will run (e.g. Monthly, Quarterly, etc.)

- **End Date:** Select a specific end date, a number of payments, or allow the user to end payments at their request.

- **Amount:** Choose to have the full amount due withdrawn with each payment or withdraw only a fixed amount each time.

- **Notification:** A reminder email sent to the user any number of days before an automatic payment is made.

Once completed, select **PROCEED**. You will then have the option to review the account setup. Once confirmed, select **SUBMIT** to send an invitation.

*Payment options & fees may vary. Any associated fees will be added to the total withdrawn for each payment. Please review applicable fees with the tenant, resident, or member before setting up automatic payments.