



## Online Payments Portal AutoPay Setup Instructions

### 1. Log in to Pristine Pools, Inc.'s Online Payments Portal.

Visit our website at [www.pristine-pools.com](http://www.pristine-pools.com), and select the 'Online Payment Option' link found on the right side of the web page. You will then be redirected to the Online Payments Portal login page. If this is your first time accessing the Portal, please click "REQUEST ACCOUNT" on the bottom left of the login page (if you don't have an account there is no need to enter in your Email and Password).

Email

DO NOT COMPLETE THIS SECTION...YET!


Password

LOG IN

REQUEST ACCOUNT

RESET LOGIN/PASSWORD

2. If you clicked “REQUEST ACCOUNT,” the box below should pop up. **Please complete the requested fields with your contact information; you may enter ‘Pristine Pools, Inc.’ as the Company. Click “REQUEST ACCOUNT” when done and the Pristine Pools office will be notified of your request.** Once the office has received and processed your request, **you will be sent a Welcome Email containing a link to set a password for account access and create an account.** This email will be sent from ‘info@pristine-pools.com’.




Name  
YOUR NAME

Company  
Pristine Pools, Inc.

Phone  
YOUR PHONE NUMBER

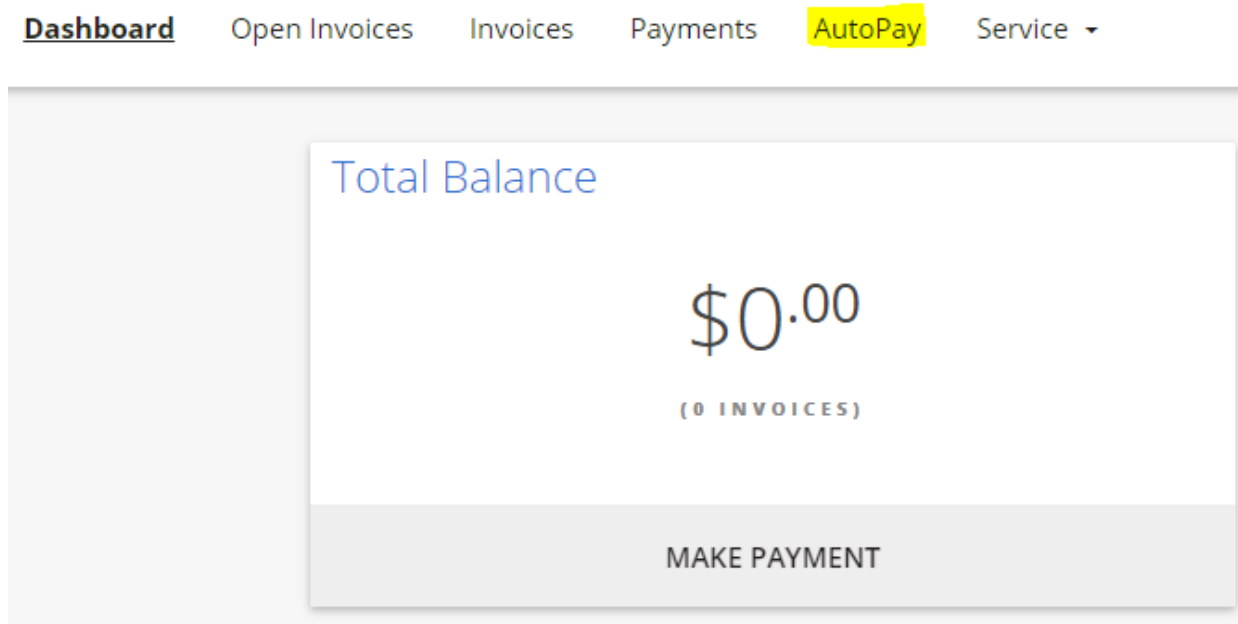
Email  
YOUR EMAIL ADDRESS

I'm not a robot   
reCAPTCHA  
Privacy - Terms

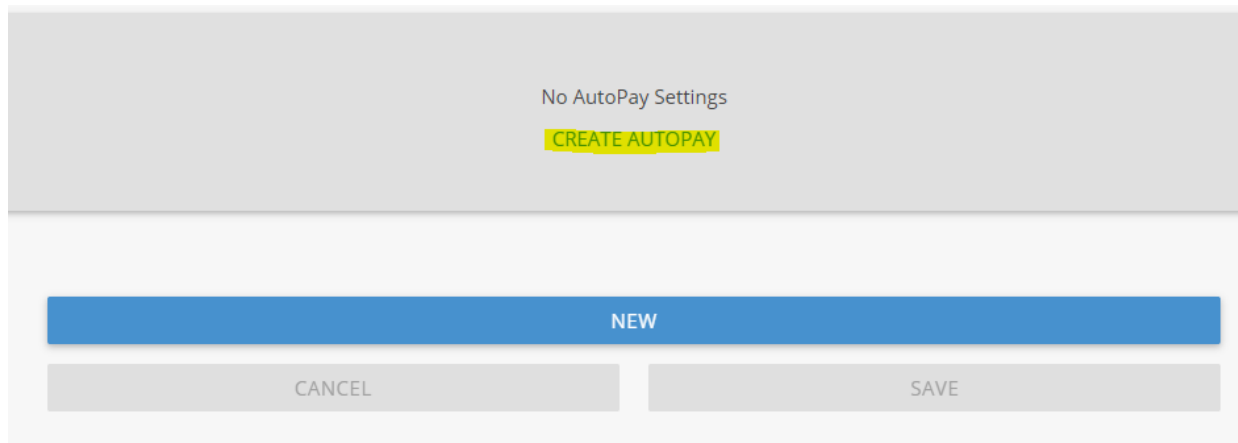
REQUEST ACCOUNT

← BACK

3. Once you've created and logged in to your account, you will arrive on the Dashboard page. Select 'AutoPay' from the menu options.



4. Select 'CREATE AUTOPAY' to begin setting up a new AutoPay rule.



5. **Here is where you create a new AutoPay rule by manipulating various fields such as the Payment Method, AutoPay Run Date, and Amount settings.**

We will go over how to set up these individual fields together. The following information automatically appears by default and will need to be updated based on your individual AutoPay preferences:


☰ 🔒 AutoPay when Invoice Amount Is less than 1.00

<u>Payment Methods</u> Choose Your Option ▼	<u>Run AutoPay</u> On Due Date	Unlock Changes <input type="checkbox"/>
<u>Autopay Type</u> Amount ▼	Less Than	<u>Amount</u> 1

6. **AUTOPAY RULE CREATION: Payment Method Setup – select ‘Choose Your Option’ under the Payment Methods field to add a new payment method to your account or to select a pre-existing payment method you would like to use for AutoPay.**

Payment Methods

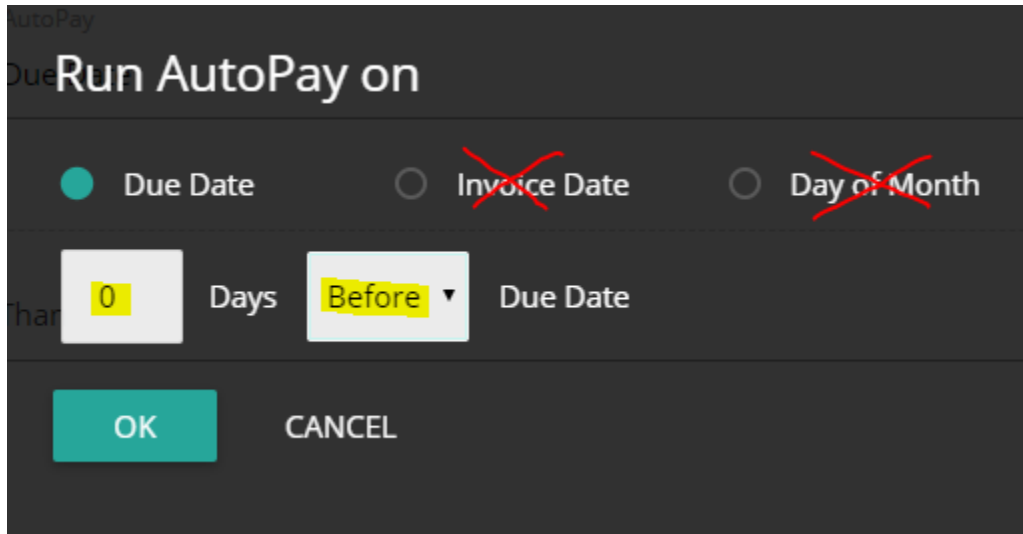
Choose Your Option

 VISA 1234

Add New Payment Method

**\*\*If adding a new payment method, click on the type of payment method (Credit Card or Bank Account) and follow the prompts using the ‘NEXT’ button located on the bottom right of the screen, and enter in all required information. Once this new payment information has been saved, it will appear as a payment option when setting up AutoPay or making a manual payment.**

7. **AUTOPAY RULE CREATION: AutoPay Run Date Setup** – **select 'Run AutoPay'** and the following window will appear:



*\*\*For accurate AutoPay processing, **we strongly recommend setting your AutoPay to run based on the Due Date** (not the Invoice Date or Day of Month). You may select your AutoPay to run on the due date, or to run 'x' number of days before the due date or after the due date. Click 'OK' to save your selection.*

- 8. **AUTOPAY RULE CREATION: AutoPay Type (Amount) Setup** – These fields (*highlighted in yellow*) need to be updated in order to instruct the AutoPay system on what open invoices to automatically pay on your account, based on the terms (*less than, greater than, etc.*) and dollar amount set by you.

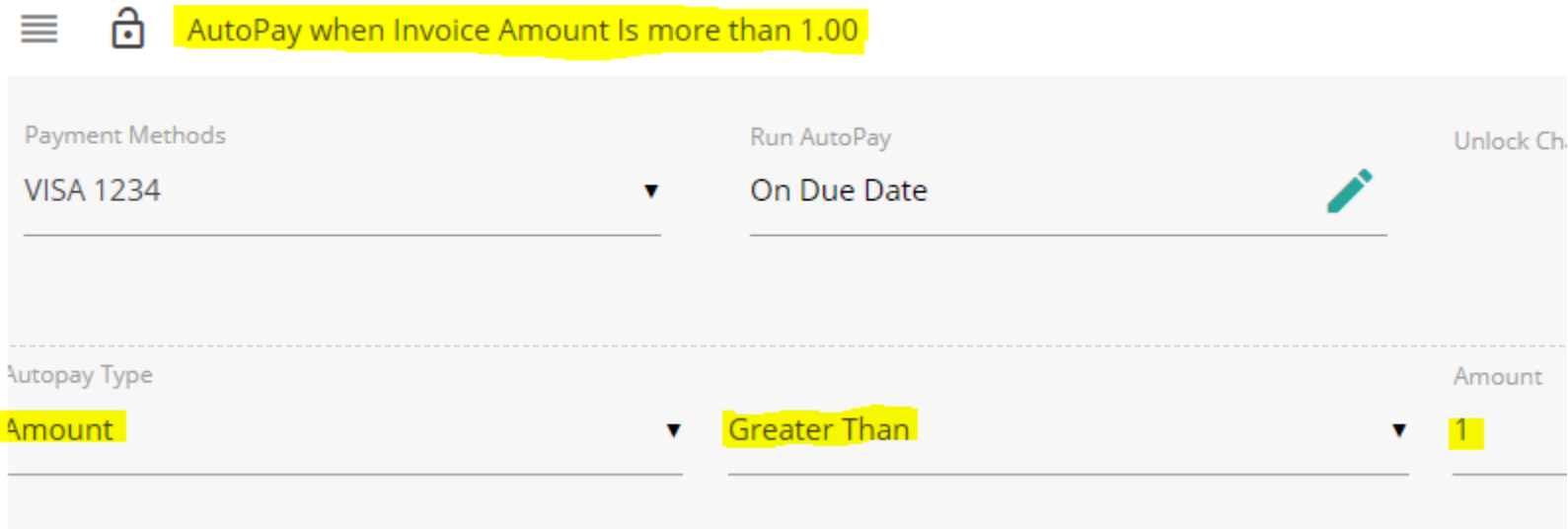
**AutoPay will analyze each open invoice on your account to determine what invoice(s) meet the AutoPay criteria, and only automatically process payment for those invoices.** Any open invoices that fall outside of the AutoPay criteria will require the customer to process a separate payment.

The screenshot shows a form for setting up an AutoPay rule. On the left, there is a dropdown menu labeled 'Autopay Type' with 'Amount' selected. Below it is a text input field for 'Amount' containing the number '1'. To the right of the input field is a dropdown menu labeled 'Choose Your Option' with four options: 'Less Than', 'Greater Than', 'Equals', and 'Does Not Equal'. Below the input fields is a button labeled 'ADVANCED'.

Below are some examples to help explain how this works and assist you in the AutoPay Amount setup:

**AutoPay Goal #1: I want to “set it and forget it”, having all my monthly open invoices automatically paid.**

AutoPay Settings: Select payment terms of ‘Greater Than’ and select amount as ‘1’. Your settings should look like this:



The screenshot shows the AutoPay settings interface. At the top, there is a menu icon, a lock icon, and a highlighted text box that reads "AutoPay when Invoice Amount Is more than 1.00". Below this, there are two main sections. The first section is titled "Payment Methods" and shows "VISA 1234" with a dropdown arrow. To the right of this section is "Run AutoPay" set to "On Due Date" with a pencil icon and a "Unlock Ch" button. The second section is titled "Autopay Type" and shows "Amount" with a dropdown arrow, "Greater Than" with a dropdown arrow, and "1" with a dropdown arrow.

What Invoices will be paid via AutoPay? All of them! Your AutoPay will process and pay all open invoices that have an amount due of more than \$1.

What Invoices will I have to manually process payment for? None! That’s the beauty of ‘set it and forget it’!

**AutoPay Goal #2: I want to have most invoices automatically paid for me but want to first review any larger invoices, greater than \$500, prior to making my payment.**

AutoPay Settings: Select payment terms of 'Less Than' and select amount as '500'. Your settings should look like this:

The screenshot shows the AutoPay settings interface. At the top, there is a lock icon and a text label "AutoPay when Invoice Amount Is less than 500.00" which is highlighted in yellow. Below this, there are two main sections. The first section, "Payment Methods", includes a dropdown menu labeled "Choose Your Option" and a "Run AutoPay" section set to "On Due Date" with an edit icon. The second section, "Autopay Type", includes a dropdown menu labeled "Amount" (highlighted in yellow), a dropdown menu set to "Less Than" (highlighted in yellow), and a text input field labeled "Amount" containing the value "500" (highlighted in yellow). There is also an "Unlock Ch" option visible on the right side.

What Invoices will be paid via AutoPay? Your AutoPay will process and pay all open invoices that have an amount due that is less than \$500.

What Invoices will I have to manually process payment for? Any open invoices that have an amount due of \$500 or more. You may make a manual payment by logging into your account on Pristine Pools, Inc.'s Online Payments Portal, and selecting 'Make Payment' on the home screen.



**AutoPay Goal #3: I want to have *only* my monthly Basic-Plus routine service invoice (for \$110) automatically paid each month and will make manual online payments for all other invoices open on my account.**

Unfortunately, AutoPay cannot be set up to automatically pay only 1 *specific* invoice each month however can be set up to pay all open invoice(s) that equal a specific dollar amount. The AutoPay rule will analyze all open invoices on the account, based on the dollar amount and terms set, and automatically process payment on all open invoices that meet the AutoPay criteria.

AutoPay Settings: Select payment terms of 'Equals' and select amount as '110'. Your settings should look like this:


The screenshot shows the AutoPay settings interface. At the top, there is a menu icon, a lock icon, and the text "AutoPay when Invoice Amount Is 110.00" which is highlighted in yellow. Below this, there are two main sections. The first section is titled "Payment Methods" and "Run AutoPay". Under "Payment Methods", it shows "VISA 1234" with a dropdown arrow. Under "Run AutoPay", it shows "On Due Date" with a dropdown arrow and a pencil icon. To the right of this section is a "Unlock Ch" button. The second section is titled "Autopay Type" and "Amount". Under "Autopay Type", it shows "Amount" with a dropdown arrow. Under "Amount", it shows "Equals" with a dropdown arrow and "110.00" with a dropdown arrow. The "Amount" and "110.00" text are highlighted in yellow.

What Invoices will be paid via AutoPay? Only invoices that equal exactly \$110.

What Invoices will I have to manually process payment for? All open invoices on your account that do not equal \$110. You may make a manual payment by logging into your account on Pristine Pools, Inc.'s Online Payments Portal, and selecting 'Make Payment' on the home screen.

9. **Once you've updated all AutoPay fields, you will want to save this new AutoPay rule**, and go lay poolside because it's lovely out, you have a pool and just checked one more item off your to-do list.

☰ 🔒 AutoPay when Invoice Amount Is more than 1.00

Payment Methods	Run AutoPay	Unlock Chan
VISA 1234 ▼	On Due Date 	

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Autopay Type	Amount
Amount ▼	Greater Than ▼
	1

ADVANCED

\*By saving, you are authorizing all of the above payments according to their criterion.

**NEW**

**CANCEL** **SAVE**

Have any questions or comments on setting up AutoPay? We are here to help! Reach us by phone at (925) 777-1297 or email at [info@pristine-pools.com](mailto:info@pristine-pools.com).