ask Automations

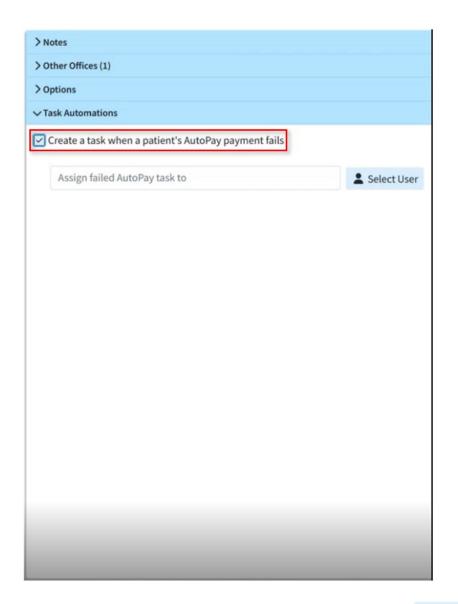
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ask Automations allow an office to set up an automated action based on the parameter selected.

Our "Create a task when a patient's AutoPay payment fails" automation will automatically generate a new task for any payment failures during the daily AutoPay process. This task will be linked to the patient and assigned to a pre-selected user or group.

ollow the steps below to set your Task Automations for a specific office:

- 1. Select Customer Setup > Practices.
- 2. Use the Show All button to view all practices. Or use the Search field to further drill down your search.
- 3. Select the Practice.
- 4. Locate and click on the **Task Automations** tab within the right-hand side panel.
- 5. Check the Create a task when a patient's AutoPay payment failscheckbox.



- 6. Enter the username you would like to assign this task to, or click Select Users and choose the individual user or group from the list to assign the failed autopay tasks.
- 7. Click Save.