Task Automations

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 fails** checkbox.

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**.