Find/Edit a Payment Automation

⚠ You can edit custom payment automations you create, but you cannot change or reorder the default payment automations provided by the CollaborateMD software (the bottom four entries listed). You can only deactivate these default automations to disable them if needed.

🪄 Automations are evaluated from top to bottom in the list. If you have multiple automations that can apply to the same scenario, the top one on the list will be applied. You can use the drag handle ═ to reorder automations by dragging and dropping them to the desired position.

1. Select **Customer Setup** > **Customization** > **Payment Automation**.

2. Select (click) the Automation you want to edit from your Payment Automations list.

3. Make any applicable changes or edits to your criteria, adjustment, processing, or additional actions within your payment automation.

4. Click **Save**. Otherwise, click **Close** if no changes were made.

   🪄 For more info on payment automation fields or for adding/creating a new payment automation, visit our Add a Payment AutomationHelp Article.