


Manage Payment Automation Status

† Modified on 10/07/2025 1:57 pm EDT

 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.

1. Select **Customer Setup > Customization > Payment Automation**.
2. Click the **Edit** button.

Inactivate a Payment Automation

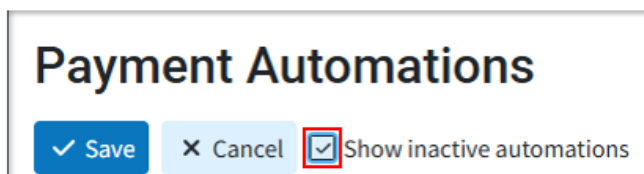
In the event a Payment Automation is no longer in use, you can inactivate it to prevent the rule from being applied within an ERA. Please note that there is no way to permanently delete a Payment Automation.

1. Find the payment automation you want to inactivate within your list.
2. Place a check in the **Inactive** box (right side column) for the payment automation you want to inactivate.

Reactivate a Payment Automation



If an inactive Payment Automation needs to be reactivated.

1. Place a check in the **Show inactive automations** box (top of the screen).



The screenshot shows a header titled "Payment Automations". Below the header are three buttons: "Save" (blue with a checkmark), "Cancel" (light blue with an 'x'), and "Show inactive automations" (light blue with a checked checkbox). The checkbox is highlighted with a red square.

2. Find the payment automation you want to reactivate within your list.
3. Uncheck the **Inactive** box (right side column) for the payment automation you want to reactivate.

 You can also change the order of the payment automations by clicking the 2 lines to the left of the automation  then dragging and dropping it to the desired position.

3. Click **Save**. Otherwise, click **Cancel** if no changes were made.

