

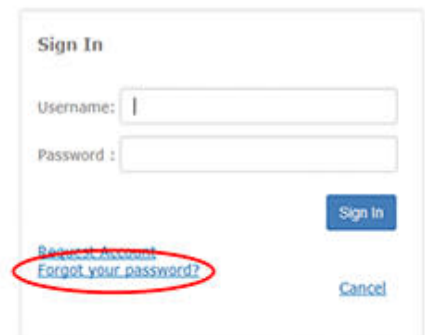
HOW TO SET UP AUTOMATIC DUES PAYMENTS

If you would like your IIABSC association membership to renew automatically (required if you pay in monthly installments) your membership billing contact needs to set up a payment profile for the agency in our system and connect it to your membership using these instructions. Automatic renewal is optional for those who pay annually.

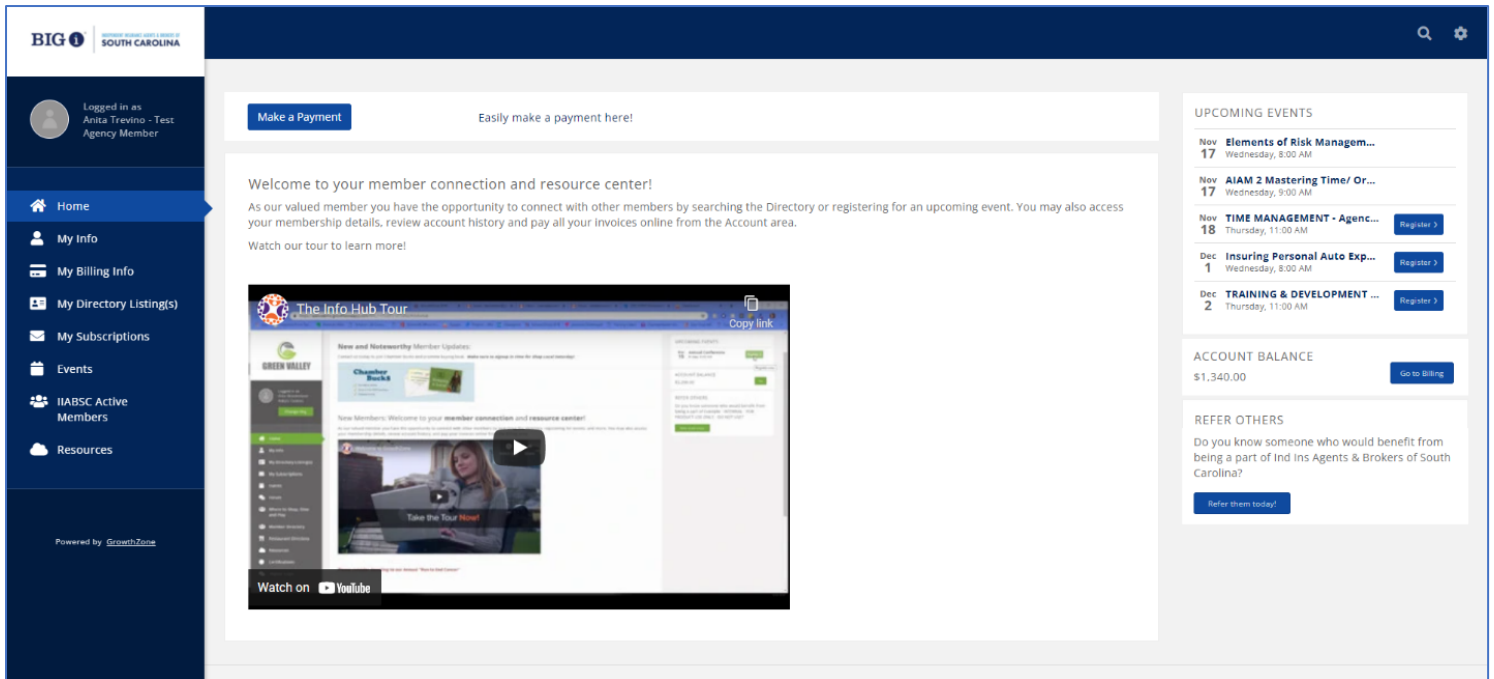
As always we appreciate your membership investments with the SC Big I. If you have any questions about your membership and dues billing or have any trouble accessing or using our system, please contact our Director of Member Services Megan Thomas at mthomas@iiabsc.com or 803-760-1227.

ACCESS OUR SYSTEM

1. Log in to our website. See [WEBSITE HELP](#) page on our website if you don't know your login or need to be added to the system.

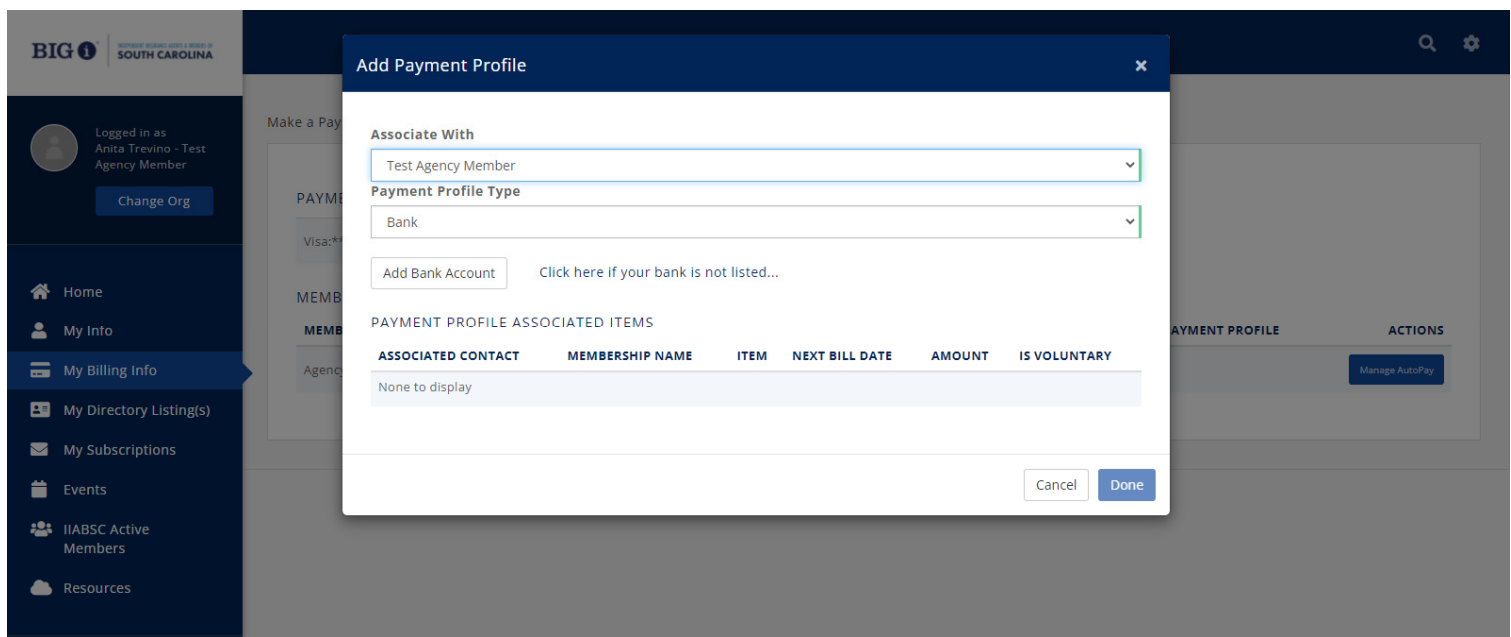


Click on your name in the member login area, then click "MEMBER INFOHUB" and you will be directed to your individual profile in the directory. *Those with appropriate permissions will be able to view agency information in the "Related Businesses," "Related Contacts" and in applicable "Related Branches" tabs of the "My Info" section.*



SET UP A PAYMENT PROFILE (BANK DRAFT)

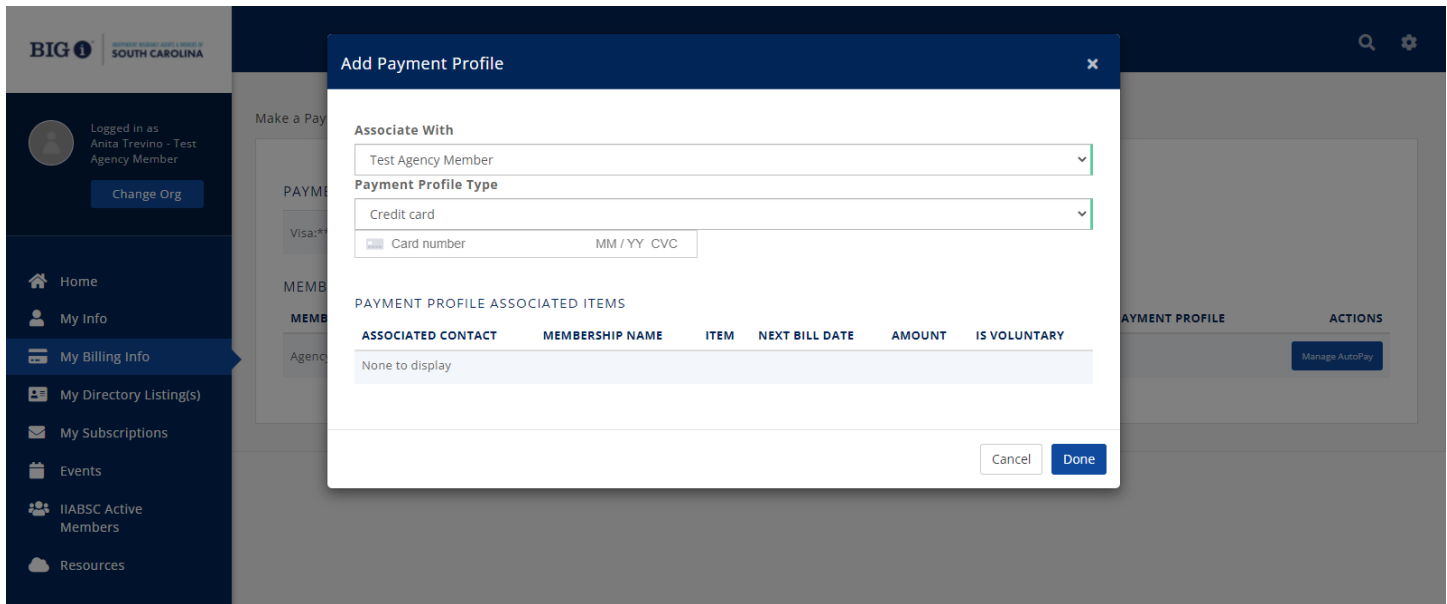
1. Access existing Payment Profiles associated with your account in the MemberHub using the **"Autopay & Billing"** tab of the **"My Billing Info"** section.
2. To add a new payment profile, click the blue "+" button on the top right of the **"PAYMENT PROFILES"** list on the **"Autopay & Billing"** page of the **"My Billing Info"** section.



3. "Add Payment Profile" window will pop up. Be sure to select that you want to associate the payments with your business profile and that it is a BANK account for draft payments in the Payment Profile Type field.
4. Once you successfully select BANK payment type, "Add Bank Account" button will appear. What is required of you next depends on your banking institution.
5. The quickest way to add a bank account is to click "Add Bank Account" button, and you will be directed to **Plaid** application. If your banking institution is listed for use then you simply need to select it from the list and enter your account username and password.
6. If you do not want to use Plaid, or your banking institution is not listed, then you can add it manually by clicking the "[Click here if your bank is not listed...](#)" link and you must enter the Account Type, Account Holder Name, Account Number, Routing Number, Country and Currency type as well as check the box to authorize us to electronically debit your account and correct errors. *Using this method requires the account to be verified, meaning two small deposits will be made to and then debited from your bank account and you will need to later go back into your profile to enter those amounts into the Payment Profile form to verify the account.*
7. In setting up the new payment profile you also have the option to select billing type items you would like to be automatically charged to the account when that type of invoice is generated, for example member dues renewals or event registrations.
8. Save and create payment profile account by clicking the blue "Done" button.

SET UP A PAYMENT PROFILE (CREDIT CARD)

1. Access existing Payment Profiles associated with your account in the MemberHub using the "**Autopay & Billing**" tab of the "**My Billing Info**" section.
2. To add a new payment profile, click the blue "+" button on the top right of the "PAYMENT PROFILES" list on the "Autopay & Billing" page of the "My Billing Info" section.



3. Add Payment Profile window will pop up. Be sure to select whether you want to associate the payments with your individual or business profiles and that it is a CREDIT CARD in the Payment Profile Type.
4. Enter card details including credit card number, expiration date and CVC number.
5. You have the option to select billing items you would like the card to automatically pay when that type of invoice is generated, for example member dues renewals and event registrations.
6. Save and create payment profile by clicking the blue "Done" button.

ACCESS YOUR AGENCY MEMBERSHIP INFO & CONNECT PAYMENT PROFILE

Access membership info from the "**Autopay & Billing**" tab of the "**My Billing Info**" section.

1. Your current membership level will display in the Membership Billing list. *Contact Member Services Director Megan Thomas (mthomas@iiabsc.com, 803-760-1227) if membership level or billing contact needs to be updated.*
2. If the Payment Profile field of the Membership Billing table is blank or needs to be updated, click blue "Manage AutoPay" button.

Big 1 IIABSC SOUTH CAROLINA

Logged in as Anita Trevino - Test Agency Member

Home My Info My Billing Info My Directory Listing(s) My Subscriptions Events IIABSC Active Members Resources

Make a Payment Autopay & Billing Billing History

PAYMENT PROFILES

Visa:*****4408-2/2023 - Test Agency Member

MEMBERSHIP BILLING

MEMBERSHIP NAME	NEXT BILL DATE	NEXT BILL AMOUNT	VOLUNTARY AMOUNT	BILL CONTACT NAME	PAYMENT-PROFILE	ACTIONS
Agency - 8 Employees	1/1/2022	\$1,340.00	\$0.00	Anita Trevino		Manage AutoPay

If payment profile in MEMBERSHIP BILLING is empty, click blue "Manage AutoPay" button. From there you can connect existing PAYMENT PROFILES or add new ones.

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3. Select "All membership items" under the "AUTOMATIC PAYMENTS" section, and select the payment profile you want to pay dues with from the "Payment Profile" dropdown.
4. Click blue "Done" button to save and apply changes.

ABOUT DUES RENEWAL INVOICES

Your invoice will be generated with annual dues renewals with a payment scheduled for Jan. 15 of the dues year. If your annual or monthly payment for the new dues year changes, you will be notified in December. If your employee counts change at any time, contact our Member Services Director (mthomas@iiabsc.com, 803-760-1227) to update your account. Your payment amount will not change until January of the next dues year.

Monthly payer dues invoices will be generated and automatically paid on a monthly basis. The invoice will be generated on the first of the month and charged to the payment profile of record on the 15th.

Members with proper agency permissions are able to retrieve open and paid invoices from the system at any time from the "Make a payment" (open invoices) and "Billing history" (paid invoices) tabs of the "My Billing Info" section.

If you need assistance, contact:

Megan Thomas, IIABSC Director of Member Services
mthomas@iiabsc.com, 803-760-1227