

AutoPay Enrollment Guide

Step-By-Step AutoPay Enrollment Instructions



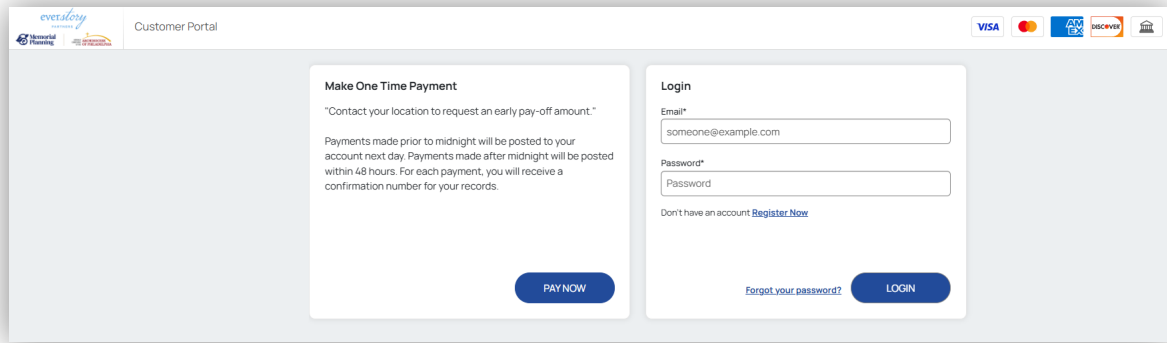
everstory
PARTNERS



AutoPay Enrollment Guide

1

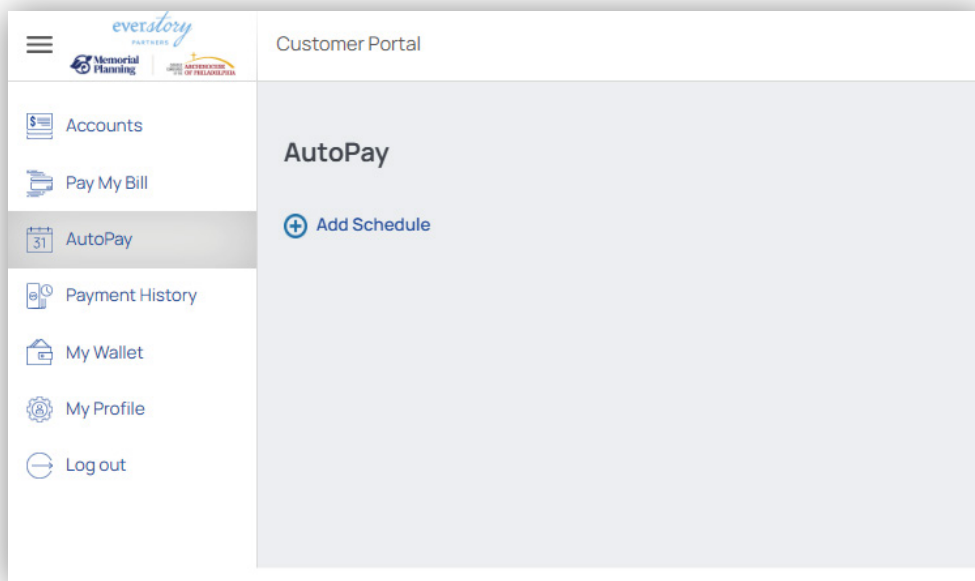
Access the Customer Payment Platform by visiting MemorialPlanning.com or ArchdioceseofPhiladelphia.org and selecting **My Account**.



The screenshot shows the 'Customer Portal' login page. At the top left is the 'everstory' logo with 'PARTNERS' and 'Memorial Planning' below it. At the top right are logos for VISA, Mastercard, American Express, Discover, and a bank icon. The main content area has two columns. The left column is titled 'Make One Time Payment' and contains text about requesting an early pay-off amount and payment posting timelines. It has a 'PAY NOW' button at the bottom. The right column is titled 'Login' and has fields for 'Email*' (with 'someone@example.com' as a placeholder) and 'Password*'. Below these fields are links for 'Forgot your password?' and a 'REGISTER NOW' button. A 'LOGIN' button is at the bottom right of the login section.

2

Click **AutoPay** within the left-hand navigation bar and then click **Add Schedule**.



The screenshot shows the 'Customer Portal' with the 'AutoPay' section selected in the left-hand navigation bar. The navigation bar includes links for Accounts, Pay My Bill, AutoPay (highlighted), Payment History, My Wallet, My Profile, and Log out. The main content area is titled 'AutoPay' and features a large blue button with a plus icon and the text 'Add Schedule'.

AutoPay Enrollment Guide

3

Select or add your Account, and select **Continue**.

The screenshot shows the 'Create New AutoPay' screen in the Customer Portal. On the left is a sidebar with navigation links: Accounts, Pay My Bill, AutoPay (highlighted), Payment History, My Wallet, My Profile, and Log out. The main content area has a header 'Create New AutoPay' and a section 'Select an Account' with a radio button selected for '201-Tricities Memorial Garden # 201-1885' and an 'Add new' button. A 'CONTINUE' button is at the bottom right. To the right is a 'How to set up AutoPay' box with five steps: 1. Select the account, 2. Choose your preferred payment method, 3. Determine the frequency of payment, 4. Configure the payment details, and 5. Choose how and when to be notified of upcoming payment.

4

Follow the screen and select '**Add New**' to input your desired payment method (choose from eCheck/ACH, Credit, or Debit card), and then click **Continue**.

The first screenshot shows the 'Add new' button in the 'Payment Method' section of the 'Create New AutoPay' screen. The second screenshot is a modal titled 'Add Payment Method' with tabs for 'E-Check / ACH', 'Debit', and 'Credit'. It includes a bank icon and a question 'Where can I find my routing and account number?' with a visual guide to a check number line. Below this, it states 'All fields are required unless labeled as optional.' and provides input fields for 'Account Type' (Checking selected, Savings optional), 'Routing Number' (122000247), 'Account Number' (1234567890), 'Bank Name' (WELLS FARGO BANK NA), and 'Name on Account' (John Smith). There is a checkbox for 'Set as default payment method' and 'BACK' and 'ADD' buttons at the bottom.

AutoPay Enrollment Guide

5

Select **Frequency**, and fill out the required details, then click **Create AutoPay**.

The screenshot shows the 'Create New AutoPay' form for '201-Tricities Memorial Garden # 201-1885'. The left sidebar contains navigation links: Accounts, Pay My Bill, AutoPay (selected), Payment History, My Wallet, My Profile, and Log out. The main content area is titled 'Create New AutoPay > 201-Tricities Memorial Garden # 201-1885'. It features a 'Payment Details' section with the following fields: Frequency (radio buttons for 'Monthly - fixed amount' and 'Bill amount on the due date', with the latter selected), Payment Amount (a text box with 'Bill Amount' entered), Total Amount (a text box with 'Bill Amount' entered), Payment Type (a dropdown menu with 'Checking Account' selected), Routing Number (a text box with '*****0247' entered), and Account Number (a text box with '*****7890' entered). To the right of these fields is a 'How to set up AutoPay' section with a numbered list of five steps. At the bottom of the form, there are two checkboxes: 'I authorize ACH direct debit payment (ACH Debit)' and 'By selecting the box, you authorize the above scheduled payments from', both of which are checked. A link for 'View Authorization Agreement for direct debit payment (ACH Debit)' is also present. The footer of the page includes 'Powered by Paymentus', a privacy notice, and a last login timestamp of 'Jun 23, 2026, 10:22:26 AM'.

Your AutoPay set up is complete. Your **Schedule Created** information will now appear.

The screenshot shows the 'AutoPay' confirmation page in the Customer Portal. The left sidebar is identical to the previous screenshot, with 'AutoPay' selected. The main content area is titled 'AutoPay' and displays the following information: '201-Tricities Memorial Garden # 201-1885' with a list icon, 'Schedule # 6826539' with an 'EDIT' button, 'Frequency' set to 'Bill amount on the due date', 'Created By' set to 'You', 'Start Date' set to 'Jun 23, 2026', 'Payment Details' with an 'EDIT' button, 'Payment Method' showing a bank icon and '*****7890', and 'Payment Amount' set to 'Bill Amount'. The footer of the page is the same as the previous screenshot.

AutoPay Enrollment Guide

You will also receive an email confirming that you are now enrolled in AutoPay.

