

online-billpay

paperless billing & payment service



Manager Help Guide

This guide covers the basic **Features** and common **Tasks** for Manager and Customer Service Representative (CSR) accounts. Managers will be able to perform all the tasks listed in this guide. CSRs will have more limited capabilities.

Please note: This guide is based on default Online-Billpay settings. Any customizations we’ve created for your company will not appear in this guide. If you have questions about any additional features, please contact our office.


CSRs can use the following pages:

- View / Manage / Pay
- Search Payments
- Custom Payment
- Edit Profile
- Security

Managers can perform all CSR functions, plus:

- Create Accounts
- Download Reports
- Download Payments
- Processor Reports
- Create and Manage Notifications
- Create and Manage Alerts
- Void and Refund Payments

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When you log in to the system, you will see a menu of options on the left side of the screen. This will be your main method of site navigation, and the guide will give a high-level overview of all the features in order.

Next, we’ll show you how to perform the most common day-to-day tasks for both CSRs and Managers.

Features

Profile Options
 Edit Profile
 Change Password
 Security


Profile Options – Edit Profile

This is where you can change your name and email address.
Note: Changes to the email address will not take affect until the new email is verified.

Edit Profile


Email Address *

SampleAdmin1@example.com



Full Name *

CSR



Required fields are marked with * asterisks.

Save Changes

Profile Options – Change Password

Some users may choose to update their password periodically for security purposes. You can do so under this page. If you forget your password, you can request a reset through the log-in page, or by contacting our office.

Change Password

Passwords must meet the following requirements

— At least eight characters in length


— At least one uppercase letter

— At least one lowercase letter


— At least one number

— At least one special character:
!"#\$%&'()*+,-./:;<=>?@[\\]^_`{|}~


Current Password



New Password



Confirm New Password



Change Password

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Customer Accounts

View / Manage / Pay

Create

Account Management – View / Manage / Pay

You can search accounts by using the Account Number, Email, Name, Username, or Service Address using the search field at the top-left corner of the accounts table. You can search using a single criterion by clicking into the text field with the magnifying glass under the column header.

If more than one of your companies is on Online-Billpay, you can filter by the company with which the account is associated by clicking the filter icon.

Note: If you are using a smaller browser window, some columns may be hidden. You can click the column chooser icon in the top-right corner to choose which columns to display.

View Customer Account

Search...

Account Number	ID Number	Company	Name	Service Address	Email	Username
00001	30FE-4C07	ABC SERVICES		N/A		
00900	BD56-B37F	ABC SERVICES	Jane Doe		johndoe123@johndoe.com	JohnDoe123
1	C920-C3F9	SAMPLE COMPANY		N/A		
102528597	F9C7-18AC	ABC SERVICES		N/A	developer@bendmailing.com	testuser1t
111111123	DC58-0122	ABC SERVICES		N/A		
12-03401	1234-ABC01	ABC SERVICES	John Doe	123 SOMEWHERE ST	johndoe123@johndoe.com	JohnDoe123
1221-1111	9BFC-78B0	ABC SERVICES	Joe Everyman	321 Fake st.	joebro@example.com	joebro
1234	C5F7-2E48	ABC SERVICES	john doe			
123-4456	B87A-9FCC	ABC SERVICES	Jeff Evans	N/A		
123453678999	6791-2144	ABC SERVICES		N/A		

102050

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Customer Accounts

View / Manage / Pay

Create

Account Management – View / Manage / Pay

Clicking anywhere on the row for an account will bring up the account details. This page is designed to allow Managers and CSRs to view and update individual customer accounts, and you can perform the most common tasks from this page. The complete page looks like this, and we will look at the individual features below.

Account Details

Account: **12-03401**

Balance: **\$71.14**

Company: **ABC SERVICES**

Store Payment Method Make a Payment

Statements

<input type="checkbox"/>	Bill Date	Download
<input type="checkbox"/>	08/01/2022	Download Statement
<input type="checkbox"/>	07/01/2022	Download Statement
<input type="checkbox"/>	05/01/2022	Download Statement
<input type="checkbox"/>	04/01/2022	Download Statement
<input type="checkbox"/>	03/01/2022	Download Statement
<input type="checkbox"/>	02/01/2022	Download Statement
<input type="checkbox"/>	01/01/2022	Download Statement

10 1 of 1

Send Statement(s)

Customer Details

Name on Statement: John Doe

Service Address: 123 SOMEWHERE ST

Customer Registered

Identification Number: 1234-ABC01

Preferred Name: John Doe

Username: JohnDoe123

Phone Number:

Email Address: johndoe123@johndoe.com

Auto-Pay: Yes

Paperless: Yes

Registration Date: 3/2/2022

Failed Emails Change Password Unregister

AutoPay

Account enrolled in AutoPay

Enrollee: John Doe

Payer: john Doe

Card Number: VISA - *****1111

Expiration: 12/22

Enrolled by: sampleadmin1

Sign-up Date: 10/5/2021 10:28:31 AM

Last Edit: 10/14/2022 2:48:51 PM

Last Run: Not Available

AutoPay Failed: Expired card on 10/10/2022

Failed AutoPays Edit AutoPay

Payment History

Pay Date	Total Amount	Trans Type	Payment Type	Payment Method	Settlement Date	Auth Code	Status
08/20/2022	\$72.35	Credit Card	Online	Credit Card	08/20/2022	152398	Approved
05/03/2022	\$65.10	Credit Card	Online	Credit Card	08/20/2022	412418	Approved
03/22/2022	\$18.10	Credit Card	Online	Credit Card	08/20/2022	8524c1	Approved

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Anywhere you see a pencil is an editable area. Simply click the pencil to update the information.

Customer Accounts

View / Manage / Pay

Create

Account Management – View / Manage / Pay (cont.)

Statements

<input type="checkbox"/>	Bill Date	Download
<input type="checkbox"/>	08/01/2022	Download Statement
<input type="checkbox"/>	07/01/2022	Download Statement
<input type="checkbox"/>	05/01/2022	Download Statement
<input type="checkbox"/>	04/01/2022	Download Statement
<input type="checkbox"/>	03/01/2022	Download Statement
<input type="checkbox"/>	02/01/2022	Download Statement
<input type="checkbox"/>	01/01/2022	Download Statement

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< 1 of 1 >

Send Statement(s)

The **Statements** panel on the left is where you can see the statement history for this customer. BMS generally maintains at least two years of statement data for each customer. The files open in PDF format and can be downloaded, emailed, printed, or saved whenever your team requires. This feature will be available even if the customer is not registered for the site.

Related Task Emailing Statements: page 26

The **Account Details** panel displays basic information about the account and has buttons for making a payment or storing payment information.

Account Details

Account:

00900

Balance:

\$100.00

Company:

ABC SERVICES

Store Payment Method

Make a Payment

The **Customer Details** panel allows you to see if a customer is registered for the site, if they have signed up for paperless billing, and other details about their site settings.

Customer Details

Name on Statement:

John Doe

Service Address:

123 SOMEWHERE ST

Customer Registered

Identification Number:

1234-ABC01

Preferred Name:

John Doe

Username:

JohnDoe123

Phone Number:

Email Address:

johnndoe123@johndoe.com

Auto-Pay:

Yes

Paperless:

Yes

Registration Date:

3/2/2022

Failed Emails

Change Password

Unregister

Related Task Register Customer: page 24

Customer Details

Name :

John Doe

Service Address:

N/A

Customer Not Registered

Identification Number:

B87A-9FCC

Register Customer

Account Management – View / Manage / Pay (cont.)

The **AutoPay** panel will show you if a customer is enrolled in AutoPay. If they are enrolled in AutoPay, you will see the available information. Click the **Failed AutoPays** button to view recent failures. Click the **Edit AutoPay** button to remove or update the payment information.

Related Tasks Enroll in AutoPay, Edit AutoPay, View AutoPay

AutoPay

Account enrolled in AutoPay

Enrollee:

John Doe

Payer:

john Doe

Card Number:

VISA - *****1111

Expiration:

12/22

Enrolled by:

sampleadmin1

Sign-up Date:

10/5/2021 10:26:31 AM

Last Edit:

10/14/2022 2:48:51 PM

Last Run:

Not Available

AutoPay Failed:

Expired card on 10/10/2022

Failed AutoPays

Edit AutoPay

If the account is not enrolled in AutoPay, simply click the **Enroll in AutoPay** button to enter the payment information.

AutoPay

Account not enrolled in AutoPay

Enroll in AutoPay

From the **Edit AutoPay** dialog, you can remove an account from AutoPay or update their payment information. You can add either a credit card or e-check account to enroll the customer. This feature works even for accounts that have not registered for online-billpay. If we have an account in our system, they can be added to AutoPay.

Edit AutoPay

Name:	john Doe
Card Number:	VISA - *****1111
Expiration:	12/22
Sign-up Date:	10/5/2021 10:26:31 AM
Last Edit:	10/14/2022 2:48:51 PM
Last Run:	Not Available
AutoPay Failed:	Expired card on 10/10/2022

Cancel

Remove

Update Info

Customer Accounts

View / Manage / Pay

Create

Account Management – View / Manage / Pay (cont.)

The **Payment History** panel will list every payment made on the account through Online-Billpay since the account was created. You can click on the row to see more information about a specific transaction. You can also email or print a receipt and submit refunds by using the buttons on the bottom of the **Payment Details** dialog box.

Related Task Taking a Manual Payment: page 17

Payment History

Pay Date	Total Amount	Trans Type	Payment Type	Payment Method	Settlement Date	Auth Code	Status
8/20/2022	\$72.35	Credit Card	Online	Credit Card	8/20/2022	152398	Approved
5/3/2022	\$65.10	Credit Card	Online	Credit Card	8/20/2022	412418	Approved
3/22/2022	\$18.10	Credit Card	Online	Credit Card	8/20/2022	8524c1	Approved

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<1>

Payment Details

Pay date:

8/20/2022 10:52:05 AM

Company:

ABC SERVICES

Account Number:

12-03401

Name:

John Doe

Address:

123 MAIN ST

Amount:

\$72.35

Transaction Type:

Credit Card

Payment Type:

Online

Reference Number:

VISA - *****1458

Authorization Code:

152398

Status:

Approved

Refund

Partial Refund

Email Receipt:

johndoe123@johndoe.com

Account Management – Create Account

This page will allow you to create an account between billing cycles. Please note – any account that is included in your data file will automatically be created. This is only for customers who start and want to pay online before the next billing file is processed. Creating an account will not register a customer. It simply makes the account available so that they can register, or so your team can sign them up for AutoPay or take account payments.

Related Task Creating an Account: page 23

Create Account

This will generate an identification number and allow the customer to register and make payments.

Please ensure the **Account Number** is **CORRECT**, or future invoices will not be added to the account.

Please Note: Accounts are automatically created when your statements are created. This optional tool is intended to create accounts for customers that want to signup for online-billpay before they receive their first statement.

Company

ABC SERVICES

Account Number

Customer Name

Service Address

Billing Address 1

Billing Address 2

Billing City

Billing State


Select a State

Billing Zip Code

Amount Due

Create Account


Payments

 Search Payments


 Custom Payment

Payments – Search Payments

This page is useful if you need to look up a payment but don't know the specific details. You can look up by payment amount, date, account number, customer name, payment type, and payment method.

The search box in the top-right corner will search all criteria but you can click into the text box with the magnifying glass under the column header search for values in that column. 

You can also click on the filter icons to filter the search results. 

Note: If you are using a smaller browser window, some columns may be hidden. You can click the column chooser icon to the left of the search box to choose which columns to display. 

Related Task Taking a Manual Payment: page 17

Search Payments

Search...

<div><div></div><div></div></div> Pay Date	Client Name	<div><div></div><div></div></div> Acct #	Name	Total Amount	Type	<div><div></div><div></div></div> Payment Type	Processed Date	Authorization Code	Status
<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>
11/08/2022 3:18:50 PM	ABC SERVICES	13-1234	Doe John Sr.	\$12.70	cc	ONLINE	11/08/2022	123456	Approved
10/05/2022 12:26:26 PM	ABC SERVICES	13-1234	Doe John Sr.	\$2.30	cc	ONLINE	10/05/2022	123456	Approved
08/20/2022 10:52:05 AM	ABC SERVICES	12-03401	John Doe	\$72.35	cc	ONLINE	08/20/2022	152398	Approved
05/03/2022 10:52:05 AM	ABC SERVICES	12-03401	John Doe	\$65.10	cc	ONLINE	08/20/2022	412418	Approved
03/22/2022 10:52:05 AM	ABC SERVICES	12-03401	John Doe	\$18.10	cc	ONLINE	08/20/2022	8524c1	Approved
12/16/2021 1:22:42 PM	ABC SERVICES	12-34571	LARRY MOE	\$1.00	cc	ONLINE	12/16/2021	123456	Approved
12/16/2021 9:46:26 AM	ABC SERVICES	12-34571	LARRY MOE	\$1.00	cc	ONLINE	12/16/2021	123456	Approved
10/27/2021 1:17:30 PM	ABC SERVICES	12-34571	LARRY MOE	\$1.00	cc	ONLINE	10/27/2021	123456	Approved
06/24/2021 11:23:54 AM	ABC SERVICES	12-34572	ALAN SMITHEE	\$1.00	cc	CSR	06/24/2021	123456	Approved
06/10/2021 4:44:45 PM	ABC SERVICES	12-34572	ALAN SMITHEE	\$1.00	cc	CSR	06/10/2021	123456	Approved

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Payments – Custom Payment

The **Custom Payment** page allows you to take payments for a customer who may not yet have an account in our system. You can also use this feature to make a payment that does not affect the customer's online balance. Enter any account number you'd like—either in your normal format or something that will be easily identifiable when you download the payments into your software. For example, if John Smith is making a drop box deposit, you can put JohnSmithDB, or 99999, or anything else that will help you correctly apply the payment.

Related Task Taking a Custom Payment: page 18

Custom Payment







Please Note: If you are processing a payment for a new account, please ensure the **Account Number** is **CORRECT** or the payment will not be added when the account is created in online-billpay.

Company

ABC SERVICES

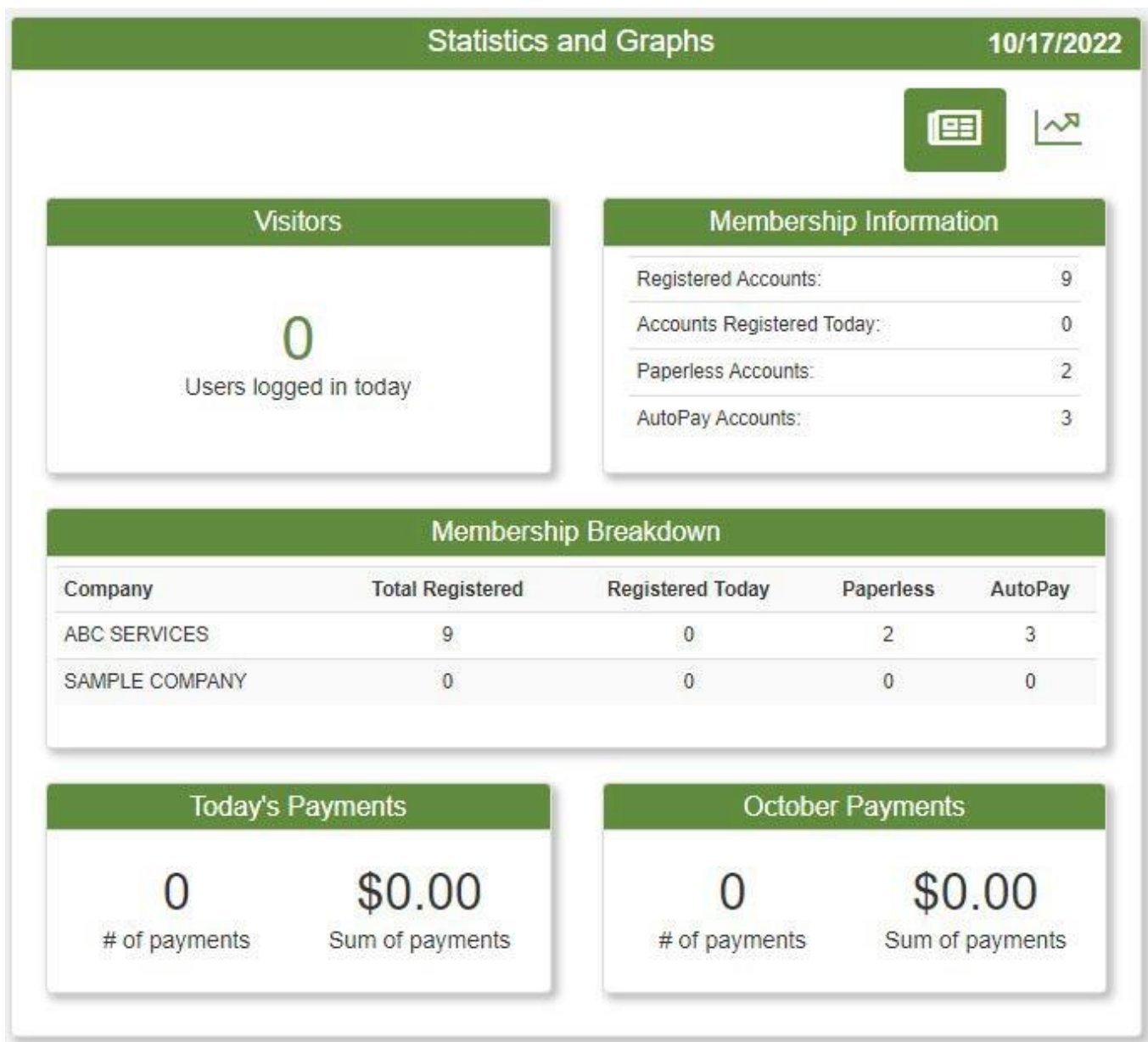
Account Number

Submit

Administration
 Statistics and Graphs
 Download Reports
 Download Payments
 OMEGA Report
 Notifications
 Alerts

Administration— Statistics and Graphs

The **Statistics and Graphs** page will give you a quick high-level view of the site activity.



- Administration
- Statistics and Graphs
- Download Reports**
- Download Payments
- OMEGA Report
- Notifications
- Alerts

Administration—Download Reports

Downloading reports will allow you to dig into specific site statistics. These reports open in excel and can be saved in any format you'd like. If your team needs a report that is not listed, BMS will be happy to work with you to add it!

Download Reports

Report Type

Accounts Registered by CSRs

Company

All Companies

Date Range

-Quick Select Dates-

From

To


View

Download

Accounts Registered by a CSR.

The default list of reports includes:

- Accounts Registered by CSRs
- Accounts Registered by CSRs**
- Accounts With Credit Balance
- ACH Returns
- All Registered Accounts
- Autopay - No Paperless
- Autopay Accounts
- Autopay By CSR
- Autopay Edit History
- Autopay Failed
- Autopay Failed By Date
- Autopay With Balances
- Autopay With Expired Cards
- CSR Autopay Edit History
- Deleted Accounts
- Inactive Accounts
- Only Paperless Accounts (No Autopay)
- Paperless Accounts
- Payments By CSRs
- Refunded Payments
- Register/Autopay Summary

Administration
 Statistics and Graphs
 Download Reports
 Download Payments
 OMEGA Report
 Notifications
 Alerts

Administration—Download Payments

Your team may use this page to download payments from a specific day, or range of dates. We'll format the download file to be compatible with your software, and you'll be able to batch-import payments made each day.

Download Payments

Company

ABC SERVICES

-Quick Select Dates-

Start Date

10/12/2022







End Date

10/12/2022

View All

View CC

View ACH

Administration
 Statistics and Graphs
 Download Reports
 Download Payments
 OMEGA Report
 Notifications
 Alerts

Administration—Processor Reports

Additional reporting may be available from your processor, and the level of integration will depend on your agreement with that specific company. If additional reporting is available, you'll find it here. Of course, if you can't find what you're looking for, we're happy to work with the processor to find the answer.





Date:

Type:

Administration—Notifications

This is just one more way to communicate with your customers. Your team can create custom notifications to show up when a customer logs into Online-Billpay. You can select recipients based on categories like Paperless and AutoPay enrollment or target specific account numbers.

Related Task Creating Notifications: page 27

Notifications

Create Notification

Filter by Company: All Companies

Company	Title	Date	
ABC SERVICES	Late Notice	10/27/2021 1:23:26 PM	Clone Delete
ABC SERVICES	WIN A NEW IPAD	5/6/2021 12:53:00 PM	Clone Delete
ABC SERVICES	Rate Change NOTICE	4/7/2021 9:32:30 AM	Clone Delete
ABC SERVICES	Get on Paperless!	7/24/2019 2:39:24 PM	Clone Delete
ABC SERVICES	Sign Up for Autopay!	12/31/2018 10:00:34 AM	Clone Delete
ABC SERVICES	LATE! PAY NOW	10/3/2018 11:52:43 AM	Clone Delete
ABC SERVICES	Sign Up For Paperless!	9/19/2018 3:40:59 PM	Clone Delete
ABC SERVICES	Paperless and Autopay	6/29/2018 10:57:12 AM	Clone Delete
ABC SERVICES	Paperless and Autopay	5/17/2018 9:45:49 AM	Clone Delete
ABC SERVICES	Paperless	2/27/2018 11:15:55 AM	Clone Delete
ABC SERVICES	Autopay	2/27/2018 11:14:59 AM	Clone Delete
ABC SERVICES	Please pay your bill	10/19/2017 11:44:39 AM	Clone Delete

Showing 1 to 12 of 12 entries

Administration—Alerts

Your team can create custom alerts to show up when a customer logs into Online-Billpay. You can select recipients based on categories like Paperless and AutoPay enrollment or target specific account numbers.

Create Alert

Company

ABC SERVICES

Recipient Group(s)

Registered Accounts

Include Account(s)

Select...

Exclude Account(s)

13-1235

Title

Our office will be closed for Thanksgiving

Alert Type

Info

Start Time

12:00 AM

All day

End Time

12:00 AM

Our office will be closed on November 24-25 for the Thanksgiving holiday!

Save and Continue

Cancel

Common Tasks

Taking an Account Payment

- 1) Navigate to the **View / Manage / Pay** page and lookup the account.
- 2) Click on the **Make a Payment** button.
- 3) You will receive a pop-up dialog with two tabs—one for Credit Card payments and another for E-Check (or ACH) payments. Click the appropriate tab.
- 4) Confirm the payment amount in the **Amount** field and complete all other fields on the form. The form will automatically fill in the total currently balance due for the account, but this can be changed to take a partial payment.
- 5) At the bottom of the form, you have the option to sign this customer up for AutoPay using the same payment information. The payment profile will be stored for future reference.
- 6) Click the **Pay** button. If the payment is successful, you'll receive a message confirming the payment.

Account Payment 102528597

Credit Card | E-Check

Credit Card Info

Amount: 50.00 | Card Number: [Field] | Name on Card: [Field] | Expiration: 10/2022 | Security Code: [Field]

Billing Address

Address: [Field] | City: [Field] | State: Oregon | Zip Code: [Field] | Email (Optional): [Field]

☐ Save this payment information? ☐ Sign this customer up for AutoPay?

Pay \$50.00

Summary

Account: 102528597 | Balance: \$50.00

Account Payment 102528597

Credit Card | **E-Check**

Account Info

Amount: 50.00 | Bank Account Number: [Field] | Confirm Bank Account: [Field] | Routing Number: [Field] | Account Type: Checking | Check Type: Personal

Billing Address

Full Name: [Field] | Address: [Field] | City: [Field] | State: Oregon | Zip Code: [Field] | Email (Optional): [Field]

☐ Save this payment information? ☐ Sign this customer up for AutoPay?

Pay \$50.00

Summary

Account: 102528597 | Balance: \$50.00

Taking a Custom Payment

- 1) Navigate to the **Custom Payment** page.
- 2) Enter an account number. This can be anything you want to reference later—a customer name, a regular account number, a series of random numbers. This will be the account number included on the payment download file, so please make it something you'll remember.
- 3) You will receive a pop-up window with two tabs—one for Credit Card payments and one for E-Check (or ACH) payments. Please select the appropriate tab.
- 4) Complete all fields on the form, including the amount due.
- 5) Click **Pay**.

Custom Payment

Please Note: If you are processing a payment for a new account, please ensure the **Account Number** is **CORRECT** or the payment will not be added when the account is created in online-billpay.

Company

ABC SERVICES

Account Number

Submit

Account Payment 102528597

Credit Card

E-Check

Credit Card Info

Amount

50.00

Card Number

VISA

MasterCard

Discover

Name on Card

Expiration

10

2022

Security Code [?]

Billing Address

Address

City

State

Oregon

Zip Code

Email (Optional):

☐ Save this payment information?

☐ Sign this customer up for AutoPay?

Pay \$50.00

Account Payment 102528597

Credit Card

E-Check

Account Info

Amount

50.00

Bank Account Number

Confirm Bank Account

Routing Number

Account Type

Checking

Check Type

Personal

Billing Address

Full Name

Address

City

State

Oregon

Zip Code

Email (Optional):

☐ Save this payment information?

☐ Sign this customer up for AutoPay?

Pay \$50.00

Summary

Account	102528597
Balance	\$50.00

Issue a Refund

- 1) Locate the payment via the **View / Manage / Pay** or **Search Payments** page and click on the row.
- 2) Click the **Refund** or **Partial Refund** button.
- 3) If you choose to issue a partial refund, you will enter the amount in the next window that pops up. Then click **Issue Refund**.

Note: Payments can be voided on the same day they were made. The **void** button will appear instead of the **refund** buttons. Voiding a payment will prevent the money from being taken out of the customer's account.

Payment History								
↓	Pay Date	Total Amount	Trans Type	Payment Type	Payment Method	Settlement Date	Auth Code	Status
	8/20/2022	\$72.35	Credit Card	Online	Credit Card	8/20/2022	152398	Approved
	5/3/2022	\$65.10	Credit Card	Online	Credit Card	8/20/2022	412418	Approved
	3/22/2022	\$18.10	Credit Card	Online	Credit Card	8/20/2022	8524c1	Approved

Payment Details

Pay date: 8/20/2022 10:52:05 AM

Company: ABC SERVICES

Account Number: 12-03401

Name: John Doe

Address: 123 MAIN ST

Amount: \$72.35

Transaction Type: Credit Card



Payment Type: Online


Reference Number: VISA - *****1458

Authorization Code: 152398

Status: Approved

Refund Partial Refund

Email Receipt: johndoe123@johndoe.com  



Partial Refund

Issue Partial Refund

Account Number 12-03401
Transaction ID xx_612243444
Transaction Type CC
Amount Paid \$72.35

Amount to Refund

\$

Issue Refund

Enrolling a Customer in AutoPay

- 1) Navigate to the **View / Manage / Pay** page and lookup the account.
- 2) Under the **AutoPay** section, click the **Enroll in AutoPay** button.
- 3) Select the appropriate tab, either for a Credit Card or ACH (E-Check) profile.
- 4) Enter all payment information and click **Save**.

The screenshot shows the 'Enroll in AutoPay' form with the 'Credit Card' tab selected. The form includes the following fields and options:


- Card Number:** A text input field with a card icon on the right.
- Card Type:** Logos for American Express, VISA, MasterCard, and DISCOVER.
- Name on Card:** A text input field.
- Expiration:** Two dropdown menus for month (showing '11') and year (showing '2022').
- CVV2:** A text input field.
- Billing Address:** A text input field containing '123 MAIN ST' with a card icon on the right.
- City:** A text input field containing 'ANYWH'.
- State:** A dropdown menu showing 'Oregon'.
- Zip Code:** A text input field containing '55555'.
- Buttons:** A 'Cancel' button at the bottom right.


The screenshot shows the 'Enroll in AutoPay' form with the 'ACH' tab selected. The form includes the following fields and options:

- Full Name *:** A text input field.
- Bank Account Number *:** A text input field with a card icon on the right.
- Confirm Bank Account Number *:** A text input field with a card icon on the right.
- Routing Number *:** A text input field with a card icon on the right.
- Check Type *:** A dropdown menu showing 'Personal'.
- Account Type *:** A dropdown menu showing 'Checking'.
- Billing Address *:** A text input field containing '123 MAIN ST' with a card icon on the right.
- City *:** A text input field containing 'ANYWHERE' with a card icon on the right.
- State *:** A dropdown menu showing 'Oregon'.
- Zip Code *:** A text input field containing '55555' with a card icon on the right.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.


Edit AutoPay


- 1) Navigate to the **View / Manage / Pay** page and lookup the account.
- 2) In the **AutoPay** section click the **Edit AutoPay** button.
- 3) Click the **Update Info** button.
- 4) Update the information, then click **Save**.


 AutoPay



Account enrolled in AutoPay

Enrollee:	John Doe
Payer:	john Doe
Card Number:	VISA - *****1111
Expiration:	12/22 
Enrolled by:	sampleadmin1
Sign-up Date:	10/5/2021 10:26:31 AM
Last Edit:	10/14/2022 2:48:51 PM
Last Run:	Not Available
AutoPay Failed:	Expired card on 10/10/2022

 Failed AutoPays

 Edit AutoPay

View AutoPay Failures

- 1) Navigate to the **View / Manage / Pay** page and find the account using the **View Customer Account** search panel.
- 2) Under the **AutoPay** section, click the **Failed AutoPays** button.
- 3) This will bring up a dialog box with the most recent AutoPay failures.


Failed Autopay		Reason
Date		
10/10/2022		Expired card

Customer Accounts

View / Manage / Pay


Create

Enroll a Customer in Paperless Billing


- 1) Navigate to the **View / Manage / Pay** page and lookup the account
- 2) Under the **Customer Details** section, click the **Pencil Icon**. **Customer Registered** 
- 3) Toggle to the **Paperless Statements** switch to Yes.
- 4) Click **Save Changes**.


Customer Details

Name on Statement:

John Doe 

Service Address:

123 SOMEWHERE ST 

Customer Registered 

Identification Number:

1234-ABC01

Preferred Name:

John Doe

Username:

JohnDoe123

Phone Number:

Email Address:

johndoe123@johndoe.com

Auto-Pay:

No

Paperless:

Yes

Registration Date:

3/2/2022

Failed Emails

Change Password

Unregister

Manually Edit Balance Due

- 1) Navigate to the **View / Manage / Pay** page and lookup the account.
- 2) Under the **Account Details** section, click the **Pencil Icon** next to the balance.
- 3) Enter the new balance.
- 4) Click **Save**.

Account Details

Account:

12-03401

Balance:

\$71.14 

Company:

ABC SERVICES

Store Payment Method

Make a Payment

Edit Balance

Current Balance:

\$71.14

New Balance:

\$

Save

Create an Account

- 1) Navigate to the **Create Account** page by clicking **Create** in the menu.
- 2) Fill out the form. The only fields required are the **Account Number** and **Customer Name**. If the **Amount Due** field is left blank, the customer will have a \$0 balance.
- 3) Click the **Create Account** button.
- 4) You'll be given an **Identification Number**. The customer will need this to register. If they are not ready to register yet, the **Identification Number** will be shown on their **View Customer Account** page.

Create Account

This will generate an identification number and allow the customer to register and make payments.

Please ensure the **Account Number** is **CORRECT**, or future invoices will not be added to the account.

Please Note: Accounts are automatically created when your statements are created. This optional tool is intended to create accounts for customers that want to signup for online-billpay before they receive their first statement.

Company

ABC SERVICES

Account Number

Customer Name

Service Address

Billing Address 1

Billing Address 2

Billing City

Billing State

Select a State

Billing Zip Code

Amount Due

Create Account

✓ Success!

Account Created.

Identification Number: 7DAE-FA02

Register a Customer

Customers can register themselves for the site using their Account Number and Identification Number which appear on their billing statement. If they'd like to register before they receive their first statement, first create the account, then help them register using the steps below.

- 1) Once the account is created, navigate to the **View / Manage / Pay** page and lookup the account.
- 2) Under the **Customer Details** section, click the **Register Customer** button.
- 3) Complete all fields in the form.
- 4) Click **Create**.

Note: The customer will be assigned a temporary password and will be required to change it the first time they log in.

Customer Details

Name :

Service Address:

N/A

Customer Not Registered

Identification Number: DC58-0122

Register Customer

Register New Account

Add to Existing Account

Full Name *

Jane Doe

Email Address *

Confirm Email *

Phone Number (optional)

Temporary Password *

Kind.Porcupine.89

Cancel

Create

Register an Account to an Existing User

Some customers may already be registered for Online-Billpay through another service provider. They do not need to create another user to view their account with your company. Multiple accounts can be managed by a single user, and you can do this on behalf of the customer by following these steps. The customer is also able to add accounts; the directions for that process are included in the Customer Help Guide

- 1) Once the Account is created, navigate to the **View / Manage / Pay** page and lookup the account.
- 2) Under the **Customer Details** section, click the **Register Customer** button.
- 3) Click the **Add to Existing Account** tab at the top of the dialog box.
- 4) Enter either the customer's existing username or email address. Click **Search**.
- 5) Click the **Select** link next to the customer. They will now be able to see the account on their existing user. They can log in with their normal username and password.

Customer Details

Name :

Service Address:

N/A

Customer Not Registered

Identification Number: DC58-0122

Register Customer

Register New Account

Add to Existing Account

Search By:

Email

Cancel

Search

Register New Account

Add to Existing Account

Search By:

User Name

JohnDoe123

Name	User Name	Email	
John Doe	JohnDoe123	johndoe123@johndoe.com	Select

Cancel

Search

Emailing Statements

- 1) Navigate to the **View / Manage / Pay** page and lookup the account.
- 2) Check the boxes next to the bill dates for the statements you want to send.
- 3) Click the **Send Statement(s)** button.
- 4) If the customer is registered, their email address will automatically be filled in. You can change the email address or enter one for a customer that isn't registered.
- 5) Click **Send Email**.

The screenshot shows a table with bill dates from 8/1/2022 to 1/1/2022. Each row has a checkbox and a 'Download Statement' button. The checkbox for 1/1/2022 is checked. Below the table is a 'Send Statement(s)' button.

Statements	
<input type="checkbox"/> 8/1/2022	Download Statement
<input type="checkbox"/> 7/1/2022	Download Statement
<input type="checkbox"/> 5/1/2022	Download Statement
<input type="checkbox"/> 4/1/2022	Download Statement
<input type="checkbox"/> 3/1/2022	Download Statement
<input type="checkbox"/> 2/1/2022	Download Statement
<input checked="" type="checkbox"/> 1/1/2022	Download Statement

Send Statement(s)

Note—Once sent, the email cannot be recalled.

The modal form has a title 'Email Statement(s)' and a close button. It contains an 'Email' label and a text input field with the value 'johndoe123@johndoe.com'. There is a 'Send Email' button.

Email Statement(s)

Email

johndoe123@johndoe.com

Send Email

Edit Customer Details

- 1) Navigate to the **View / Manage / Pay** page and lookup the account.
- 2) Under the **Customer Details** section, click **Pencil Icon**. **Customer Registered**
- 3) You can update the preferred name, email address, phone number, and Paperless setting.

The screenshot shows a form with various customer details. The 'Customer Registered' status is highlighted in green. At the bottom are buttons for 'Failed Emails', 'Change Password', and 'Unregister'.

Customer Details

Name on Statement: John Doe

Service Address: 123 SOMEWHERE ST

Customer Registered

Identification Number: 1234-ABC01

Preferred Name: John Doe

Username: JohnDoe123

Phone Number:

Email Address: johndoe123@johndoe.com

Auto-Pay: No

Paperless: Yes

Registration Date: 3/2/2022

Failed Emails Change Password Unregister

The modal form has a title 'Edit Customer Information' and a close button. It contains fields for Preferred Name, New Preferred Name, Current Phone #, New Phone Number, Current Email, New Email Address, and Paperless Statements (Yes/No). There is a 'Save Changes' button.

Edit Customer Information

Preferred Name John Doe

New Preferred Name

Current Phone #

New Phone Number

Current Email johndoe123@johndoe.com

New Email Address

Paperless Statements Yes

Save Changes

Note: updating this information will not update it in your billing software system

Creating Notifications

You can create notifications for specific or all your customer base. Customers will see these when they log into the system. Many clients use this feature as another way to announce things like holiday closures and route schedule changes.

- 1) Navigate to the **Notifications** tab. This page will show a history of previous notifications. The history will be available until you delete the notification.
- 2) Click **Create Notification**.
- 3) Select the appropriate company using the dropdown menu.

Notifications

Create Notification

Filter by Company:
All Companies

Company	Title	Date	
ABC SERVICES	Late Notice	10/27/2021 1:23:26 PM	<div>CloneDelete</div>
ABC SERVICES	WIN A NEW IPAD	5/6/2021 12:53:00 PM	<div>CloneDelete</div>
ABC SERVICES	Rate Change NOTICE	4/7/2021 9:32:30 AM	<div>CloneDelete</div>
ABC SERVICES	Test Message	11/2/2020 2:11:36 PM	<div>CloneDelete</div>
ABC SERVICES	Get on Paperless!	7/24/2019 2:39:24 PM	<div>CloneDelete</div>
ABC SERVICES	Sign Up for Autopay!	12/31/2018 10:00:34 AM	<div>CloneDelete</div>
ABC SERVICES	LATE! PAY NOW	10/3/2018 11:52:43 AM	<div>CloneDelete</div>
ABC SERVICES	Sign Up For Paperless!	9/19/2018 3:40:59 PM	<div>CloneDelete</div>
ABC SERVICES	Paperless and Autopay	6/29/2018 10:57:12 AM	<div>CloneDelete</div>
ABC SERVICES	Paperless and Autopay	5/17/2018 9:45:49 AM	<div>CloneDelete</div>
ABC SERVICES	Paperless	2/27/2018 11:15:55 AM	<div>CloneDelete</div>
ABC SERVICES	Autopay	2/27/2018 11:14:59 AM	<div>CloneDelete</div>
ABC SERVICES	Please pay your bill	10/19/2017 11:44:39 AM	<div>CloneDelete</div>
ABC SERVICES	Your LATE!	10/12/2017 1:44:52 PM	<div>CloneDelete</div>

Showing 1 to 14 of 14 entries

Create Notification

Company

Select Company

Save and ContinueCancel

Notifications continued next page.

