ONLINE INVOICE AND PAYMENT CENTER USER GUIDE

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When logging into the Online Invoice and Payment Center website, you will be directed to a page with two options:

Registered Users - Log in

- Registered Users who have forgotten their User Name can request assistance by clicking on Forgot User Name.
- Registered Users who have forgotten their Password can request assistance by clicking on Forgot Password.

Not Registered? Register Now

• Register for access to the Online Invoice and Payment Center by clicking Register.

NEW USER ACCOUNT REGISTRATION

Complete Registration Form

All sections of the registration	Register for eStatements	
form must be completed, including accepting the terms and conditions of the Online Invoice and Payment Center.	Remit To Code • Enter your biller code as it appears on your bill • Customer Number • Enter your account number as it appears on your bill • User Name • Password • Confirm Password • Password must be at least 7 characters and include a number and an upper case letter	Enrollment Token This appears on the bottom of the first page of your paper bill, for example F2LE1ZGZ Password Question Mother's maiden name Password Answer We will use this to confirm your identity if you forget your password
	Email Address Image: Constraint of the state of th	

• Biller Code - four digit code located on the bottom left corner of your invoice.

Biller: 0000 Token: Y2S4PDNF

• Customer Number - a six-seven digit number located in the Remittance Section on your invoice.

Remittance Section	
Invoice Number:	4123456
Customer Number:	<mark>543210</mark>
Contract Number(s):	001-0123456-103
Past Due Amount:	\$0.00
Total Amount Due:	\$8,336.90

• Enrollment Token - a unique eight digit code located on the bottom left corner of your invoice.

Biller: 0000 Token: Y2S4PDNF

- User Name a user name selected by you. Must be at least three characters.
- Password selected passwords must be at least 7 characters and include a Number and an upper case letter.
- Password Question select a challenge question from the list.
- Password Answer enter your answer to the challenge question from above.
- Email Address enter an email address that will be associated with your account. This must be a valid email address, as a validation email will be sent to this address.
- Terms and Conditions terms and conditions of the site must be accepted prior to registering.

Registered Use	ers - Log	g In
User Name		٦
Password		
Log In		_
Forgot User Name	Forgot F	Password
Not Registered	d? Regis	ter Nov
Registered User Pay your bill online - no 24 hour access to state Go green - save paper	Benefits checks or ments and the env	stamps vironment
Register		

Registration Confirmation

Once you click Register, you will receive an online notification that registration was completed successfully.

Registration Successful
You have successfully registered for eStatements.
You will receive an activation email shortly. The activation email is our way of confirming that we have the correct email address on file
Click on the activation link in the email to complete your enrollment, then log in using your user name and password.
Welcome to eStatements!
Return to Home Page

Activation E-Mail

You will receive an activation e-mail with a link to complete your enrollment process.

You are required to click the link "Click here to activate" from your email. If you do not click the link, your account will not be activated. If you attempt to log in before activating your account, you will get the error message "Invalid Login Attempt".

Account Activity	
You have successfully registered for ABC Company eBill.	
Click here to activate: By activating this online account you are consenting to receive invoices electronically and paper invoices will no longer be mailed to you.	
Your registered username is TestUser01. Please use the password you created in the registration process to log in. Thank you for enrolling in eBill through our Online Invoice and Payment Center.	
ABC Company	
Customer Service Phone: 888.888.8888	

Account Activation

After clicking the link provided in the email, you will receive the following message indicating that your account was successfully activated.



TIP: We recommend clicking "Return to Home Page" and bookmarking the page for future reference.

At any time during the registration process or if you cannot locate the activation email, please contact the Customer Service phone number shown on your invoice.

By registering for this online account you are consenting to receive invoices electronically and paper invoices will no longer be mailed to you.

Logging Into Your Account

To login to your account, simply enter your user name and password at the landing page and click Log In. You will be redirected to the Online Invoice and Payment Center home page with your account summary.

Registered Us	ers - Log In
User Name	
Password	
Log In	
Forgot User Name	Forgot Password

Forgot User Name

If you have forgotten your user name, click the Forgot User Name link below the log in button.

Enter your account number below Biller Code	Enter your account number below Biller Code Account Number	Forgot User Name	
Biller Code	Biller Code	Enter your account nu	mber below
	Account Number	Biller Code	
Account Number		Account Number	

Enter your Biller Code (found on the bottom left corner of your invoice).

Biller: 0000 Token: Y2S4PDNF

Enter your Customer Number (found on the top right corner of your invoice).

Remittance Section	
Invoice Number:	4123456
Customer Number:	<mark>543210</mark>
Contract Number(s):	001-0123456-103
Past Due Amount:	\$0.00
Total Amount Due:	\$8,336.90

You will be presented with a confirmation screen indicating that the User Name has been emailed to the email address on file. You will receive an email providing your User Name.



Forgot Password

If you have forgotten your Password, click the Forgot Password link below the Log In button. Enter your User Name and click Submit.

Forgot Password	
We can reset your pa	ssword once we verify your identity
Disease askession like	- News below
Please enter your Use	er name below
Please enter your use	r Name below
User Name	r name below
User Name	

You will then be presented with your challenge question that you chose when registering to use the site. Enter the answer to your challenge question and click Submit. The system will generate a temporary password that will be emailed to the email address on file.

swer below
me
Return to Home Page

You will receive your temporary password in an email.

Click the link provided in your email and enter your User Name and Temporary Password. Upon logging into the Online Invoice and Payment Center, you will be required to change your password.

ABC COMPANIES
Account Activity
The password for user has been reset. The new password is Password1. You must use this password to access the site. Please log in at
You will be required to change the password the first time you log in.
ABC COMPANIES
Customer Service Phone: XXX-XXX-XXXX

Enter the Temporary Password from the email and setup a new password. Your password must be at least 7 characters and include a Number and an upper case letter.

assword Change Re	quired
You are required to change Password must be at least 7	your password before continuing characters and include a number and an upper case lette
Temporary Password New Password	
ОК	Return to Home Page

Enter a valid new password and click OK. You will receive confirmation of the password change and may now return to the Home Page to login.

Menu Bar

The menu bar is accessible from all pages and is located on the left hand side of the screen.

My Account	Account Summary:	Returns you to the home page
Account Summary	Statement History:	Review your invoices for the past twelve (12) months
Statement History	Settings:	Allows you to update your email address and change what email notifications you get from the Online Invoice and Payment Center
Settings	Make a Payment:	Schedule payments on your account
Change Password	Payment History:	Review payments posted to your account
	Payment Accounts:	Setup a bank account to make payments
\$ Payments	User Guide:	Online Payment Portal user guide
Make a Payment	Change of Address	Change of Address Form is necessary to change your physical, billing
Payment History	гогш;	or equipment addresses
Payment Accounts		
📕 Help	Fach of these areas will be	described more in their sections later in this user guide
User Guide	Lach of these areas will be	e described more in their sections later in this user guide.
Change Of Address Form		
🔒 Log Off		

Account Summary

Upon logging in to the Online Invoice and Payment Center, the site brings you to the Account Summary page by default.

Account Summary

User Name	ABC Customer		Customer Number		Account Name			Invoid	e Number		Autopay		Autopay Enal	bled	URL
Last Payment Total Amount Due	\$1,866.00 on 03-08-2017 \$4.334.40			Ŷ			9			9		Ŷ		9	
		*	123456		ABC COMPANY, INC.			12345	i67		Configure		No	106	View Statement
Make a Payment			Contract#	Descr	ption	Balance as of	Due	Date	Scheduled Paymer	nt	Amount Paid	Amount E	ue		
			001-1234567-000	WIDG	ET	3/12/2017	4/1/2	2017	None		\$0.00	\$602.40			
			001-1234567-000	WIDG	ET	3/13/2017	4/2/2	2017	None		\$0.00	\$3,732.00	D		
		- 0	Sector Filter			0/ 10/ 201/	.,				40100	407702101	<u> </u>		

Account Details

On the Account Details page, you will find the following details about your account:

The Customer Number assigned to your account.
The legal name reflected on your account.
The most recent invoice number generated on your account.
Allows you to setup recurring AutoPay payments that are
automatically scheduled based on your due date.
Yes means AutoPay is enabled; No means AutoPay is not enabled.
Allows you to view your most recent invoice. Additional invoice
history is available on the Statement History page.

Contract Details

By clicking the arrow to left of your Customer Number, you can expand the section to show a list of your active Contracts. For each contract, the site will show:

Contract Number:	The unique contract number assigned to that lease or loan.
Invoice Description:	The description of the equipment as shown on your invoice.
Balance Date:	The date of the last invoice or of the last payment, whichever is more current.
Due Date:	The due date of the balance due on that contract.
Scheduled Payment:	The amount of any scheduled future payments.
Amount Paid:	The amount of previous payments against the last invoice balance.
Amount Due:	The balance due on that contract as of the last invoice or the last payment date, whichever is more current.

Statement History

Storage of all invoices that have been generated on your account for the past twelve (12) months under the Statement History.

Statement History

Customer Number	Date 🔫					Name	Address	
	· · · · · · ·	<u>ې</u>	Ŷ	Ψ.	φ			Ŷ
1234567	03-26-2017	Statement	\$2,168.30	04-15-2017	1234567	ABC COMPANY NAME	ATTN: ACCOUNTS PAYABLE	View
1234567	03-12-2017	Statement	\$1,512.37	04-01-2017	1234567	ABC COMPANY NAME	ATTN: ACCOUNTS PAYABLE	View
1234567	02-23-2017	STATEMENT	\$2,168.30	03-15-2017	1234567	ABC COMPANY NAME	ATTN: ACCOUNTS PAYABLE	View
1234567	02-09-2017	STATEMENT	\$1,512.37	03-01-2017	1234567	ABC COMPANY NAME	ATTN: ACCOUNTS PAYABLE	View
1234567	01-26-2017	STATEMENT	\$2,168.30	02-15-2017	1234567	ABC COMPANY NAME	ATTN: ACCOUNTS PAYABLE	View
1234567	01-12-2017	STATEMENT	\$1,512.37	02-01-2017	1234567	ABC COMPANY NAME	ATTN: ACCOUNTS PAYABLE	View

On the Statement History Page, the following details are provided:

Customer Number:	The customer number assigned to your account.
Invoice Date:	The date the invoice was generated.
Amount:	The amount of the invoice at the time it was generated.
Due Date:	The due date of the invoice.
Invoice Number:	The unique invoice number of the invoice.
Account Name:	The legal name reflected on your account.
Billing Address:	The address that invoice would be mailed to if electronic invoice was not enabled.
View:	The link to access a PDF copy of the invoice.

The Statement History page allows for filtering to quickly locate the information you are seeking. In any of the filter boxes, you can enter data to filter the results. For example, if you know the exact invoice number you are looking for, you can simply enter that invoice number into the box under Invoice Number to filter the results to that specific invoice.

Settings

The Settings page allows you to update your Online Invoice and Payment Center account settings.

Contact Information	Notifications					
Email Address email@email.com	Account Details Changed By Em Payment Account Changed By Em Payment Made By Em Payment Failed By Em Payment Cancelled By Em Paperlers Settion Changed By Em					
Paperless	Autopay Setting Changed	By Emai				
Send Paper Bill No	Edit Notifications					

Update Email Address

To update your email address, click on Edit Contact Information.

Address
nail address below
ns you must also enter your passwor

Enter your new email address, enter your account password, and hit submit.

Change Email Address

Your emai	l address change is pending
You will rec	eive an activation email at the new email address
Your email	address will be updated when you click on the activation link in the email
Return to S	ettings

You will receive a Change Email Address confirmation.

This activity will generate an email confirmation to the new email address on the account. You are **<u>required</u>** to click the link "Click here to activate" in the email sent to your account. If this is not clicked, any future email notifications will not be successfully sent to the new email address.

	DMFANIES
Accour	nt Activity
We hav on your comple address	re received a request to update the email address account. Please click on the link below to te the change and activate your new email s.
Click he	ere to activate
ABC CO	OMPANIES
Custon	ner Service Phone: XXX-XXX-XXXX

This activity will also generate an email confirmation to the previous email address on your account to ensure no one is fraudulently accessing your account information.

ABC	COMPANIES
Acco	unt Activity
A req	uest was submitted to change the email address for ABC COMPANIES account to:
newe	mailaddress@xyz.com
An ac chang email	ctivation email has been sent to that address. The ge will become effective when the activation link in the is clicked.
If you	did not make this change, please call us immediately
ABC	COMPANIES
Cust	omer Service Phone: XXX-XXX-XXXX

Paperless Billing Settings

By registering for your online account, **you have agreed to receive your invoices electronically.** In the event that you want to receive paper invoices, select the radio button next to Send Paper Bills and click update.

Paperless Billing		
Oon't send paper bills	Go Greenl	Go Paperless! It's easy, convenient and absolutely FREE! We'll notify you by email each month when your bill is ready to view online. No more stamps to worry about and you'll have easy access to past bills.
	Save the environment!	Benefits of Paperless Billing with eStatements
🔘 Send paper bills	Kccp getting paper	Safe & Secure All transactions are processed immediately on our secure servers Flexible: Choose automatic monthly payments or a one-time payment Acrossibility View past bills and payment activity (up to 12 months) Aways FREE – We do not charge for this service
Update	Cancel	Concerned about identity theft? One of the ways to steal your identity is for someone to break into your mail box or go through your trash and steal your mail. By going paperless, you eliminate the paper bills and you gain more control of your sensitive documents.

Notification Settings

In this section, you can enable or disable email notifications based on the type of notification.

Notifications Status

Account Details Changed	🔽 Email
Payment Account Changed	d 📝 Email
Payment Made	🗹 Email
Payment Failed	🗹 Email
Payment Cancelled	🗹 Email
Paperless Setting Changed	Email
Autopay Setting Changed	Email

Account Details Changed: This notification is sent anytime a change is made to your accounts through the Online Invoice and Payment Center.

Payment Account This notification is sent anytime a payment change is made to your account, such as adding or **Changed:** deleting an account from your Payment Accounts.

A notification is sent anytime a payment is made or scheduled. It is important to recognize **Payment Made:** that if your account is on AutoPay, you will receive a confirmation on the date that the payment is scheduled by the AutoPay system.

This notification is sent anytime a payment fails verification through the system.

Payment Failed: This notification is sent anytime a payment is cancelled, either by the user or by the system.

Payment Cancelled: The system may cancel a scheduled payment because the amount due has already been paid. This notification is sent anytime a change is made to the Paperless Billing Settings to your

Paperless Setting Changed: account.

AutoPay Setting Changed: This notification is sent anytime a change is made to your AutoPay configuration.

Change Password

Change Password

In this section, you can change your password. To complete this request, you will need to enter your current password and enter a **new password**. Passwords must be **at least 7 characters** and **include a number and an upper case letter**.

racters and include a number and an upper case letter	
	Password must be at least
	Current Password
1	New Password
	New Password

The make a payment function can be reached either by selecting the tab on the left menu bar or by clicking the button on the Account Summary screen.

Payment Account Setup

In order to make a payment, you must have a Payment Account setup in the Online Invoice and Payment Center. Add a bank account on the payment account tab.

Make a Pay	ment
Payment Account	Select a Payment Account
	Click here to manage your Payment Accounts
Payment Date	4/13/2017 👻
Total Payments	\$0.00
Next	Cancel
Transactions subm	itted after 2:00 pm EST will be processed on the next business day.

Otherwise, you will get a warning indicating "No payment accounts are available". You can reach the Payment Accounts setup functionality either by selecting that tab on the left menu bar or by clicking the "Click here to manage your Payment Accounts" hyperlink provided.

Scheduling a Payment

Once you have a Payment Account setup, you will have the option to make a same day payment or to schedule a payment for a future date.

Make a Pay	ment										
Payment Account	🕮 Checking (***2964)	Select	Invoices To Pay								
Payment Date	4/10/2017 *	Sel	ect All Clear All								
Total Payments	\$0.00	Pay			Invoice Number	-	Contract Number		Due Date	Amount Due	Amount To Pay
Next	Cancel			Ŷ		Ŷ		Ŷ		9	
			12345677		1234567		111-1234567-999		4/1/2017	\$1,512.37	
		177	12345677		1234567		111-1234567-999		4/15/2017	\$2,168,30	\$0.00

1. Select the Payment Account that you wish to utilize to make the payment.

2. Select the Payment Date that you wish to make the payment on. This date can be any date from today into the future.

Note: No payments are processed on weekends or banking holidays. Additionally, all payments submitted after 2:00 PM EST will be processed on the next business day.

elect	Invoices To Pay					
Sel	ect All Clear All					
Pay	Customer Number 🔺	Invoice Number 🔺	Contract Number 🔺	Due Date	Amount Due	Amount To Pay
	Ŷ	Ŷ	Ý	· •		
1	12345677	1234567	111-1234567-999	4/1/2017	\$1,512.37	\$1,512.37
7	12345677	1234567	111-1234567-999	4/15/2017	\$2,168,30	\$2,168.30

- 3. Select the contract(s) to remit payment to by using the radio buttons in the first column.
- **4. Confirm the Amount to Pay** in the amount to pay box on the right. Please note that you cannot enter an amount greater than the amount due for each specific invoice, but you can select an amount less than the amount due.
- **5. Confirm the Total Payments Amount** that results from the contracts selected. This is the amount of the total payment you are entering.



- **6.** Click Next. If any amount is past the due date, a notice indicating that a late fee may incur by making the selected payment after its due date.
- 7. Acknowledge the potential for late fees or change your payment date for your scheduled payment. Click Next.
- 8. Acknowledge your agreement with the Payment Terms and Conditions and then click Confirm.
- **9. Payment Confirmation** is provided to confirm the same day payment. If this payment was a scheduled payment for a future date, no confirmation number would appear.

Make a Payment	
Payment Confirma	ation
Tour payment was successio	ny processed
Transaction Amount	\$3,047.79
Payment Date	02-28-2017
Payment Account	Checking (***0000)
Confirmation Number	510322408
Return to Account Summary	

Payment History

The Payment History section provides a list of all payments remitted on your account. This list includes payments that were processed through the Online Invoice and Payment Center, as well as other direct payment methods.

	Customer	Number	Payment I	Date 🔻	Amount		Payment Account	Status	Authorization Code	Mode	Actio
*	1234567		03-10-20	17	\$1,234.56	[*****		Approved		Import	
	Invoice#	Contrac	:t#	Amour	nt Custo	mer N	umber				
	12345678	000-012	34567-333	\$2,477	7.58 12345	6					
>	1234567	01-10-20		1-10-2017				Approved		Import	
>	1234567	34567 0		17	\$1,234.56	(Second		Approved		Import	

Customer Number: The Customer Number assigned to your account.

Payment Date: The date the payment was posted to your account.

- Amount: The amount of the payment.
- **Payment Account:** The account used to make payment with. This is only available if the payment was made on the Online Invoice and Payment Center.

Status: The shows if a payment was approved or rejected for any reason after it was submitted.

- Authorization Code: The system generated information relating to your payment. This is only available if the payment was made on the Online Invoice and Payment Center.
 - **Mode:** This indicates whether the payment was processed through the Online Invoice and Payment Portal (User) or if it was processed via an outside system or any other payment directly remitted to your finance company (Import).

Clicking on the arrow to the left of the customer number on each payment allows you to see which invoices and/or contracts the payment was applied to.

Additionally, the Payment History section allows you to export all payments to Excel. To do this, click the Export button on the bottom left of the Payment History box. This will open up the payments in Excel.



Payment Accounts

The payment accounts section provides for entry of your bank account information, which is necessary in order to make or schedule a payment or to configure AutoPay.

уре	Nick Name	Account Holder	Last 4	Expires
Vo	u don't have	any navment acco	unte ava	ilablo
10	u uon t nave i	any payment acco		liable.
lick "	Add Payment	Account" to add a	a paymer	nt account

Adding a Payment Account

To add a new payment account, click Add Payment Account. This will generate a pop-up window within your browser to add a bank account.

Nickname			
Your description for this account, for	example "Personal Checking"		
Accountholder Name		0	
Account Type	Checking 💟		
Routing/Transit Number 🤇			
Account Number 🞱	9		

Nickname: Name you choose that assists you in remembering which bank account you have registered. Note: The bank account number will be hidden once you add the account, so the Nickname is

helpful in allowing you to remember what account you are utilizing.

Account Holder Name: Enter the exact name as it appears on your bank account.

Account Type: Select whether the account is a checking or savings account.

Routing / Transit Number: Enter the nine (9) digit routing number for your bank.

Account Number: Enter the account number for your bank account that you are registering to make payments with.

JAME LASTNAME			001
Dity, State 00000-0000			554487-099
AY TO THE		\$:
		DOLLARS	free to the test
FOR			sic
11210428821: 9687421684	00483		
	******	****	** * \$ 1000 ** * 4 100 \$ * * 8 100 \$ * * 4 100

After inputting the information, click Add Payment Account. The system will attempt to verify that the information you entered is valid. You will receive a confirmation indicating that the payment account has been added.

When you close the Add Payment Account pop-up, the system will take you to the Payment Accounts screen. You will now see the account that was just added.

You can now either return to Make a Payment or add additional accounts. They system allows you to have multiple payment accounts. Each time you schedule a payment or setup AutoPay, you will need to select the corresponding payment account.

Editing a Payment Account

In order to make changes to the payment account, you must delete the existing account information and then Add Payment Account with the correct information.

Туре	Nick Name	Account Holder	Last 4	Expires	
 Checking Account	Checking	ABC Company	1234		Delete

To delete your payment account, choose the payment account from the list and select the Delete hyperlink next to that account. You will be presented with a confirmation screen confirming that you want to delete the requested payment account.

elete Payment Account		
Please confirm that yo	u want to delete this payment account	
Payment Account Account Type	Checking Bank Account - Checking	
Delete	Cancel	

By clicking Delete, the account will be deleted from the Online Invoice and Payment Center. The account will no longer appear on the Payment Accounts page.

CHANGE OF ADDRESS

To change the billing, shipping or equipment location address, fill out the Change of Address form located here. The form must be signed by the authorized signor on your account prior to returning it to customer service.

For assistance with the Change of Address Form, please contact Customer Service.

For assistance with your account or with the site, please contact Customer Service.