



## Customer Help Guide



## Welcome Page

Once logged in, the customer will be greeted by this welcome page. The left sidebar displays the site menu for easy navigation. The top bar contains the logout button that will take the customer back to the homepage. There is also a timer built into the site so that after thirty minutes of inactivity, the user will be sent back to the home page and forced to re-login. This helps protect the customer's personal information in the case that they forget to log off.



## Accounts

Clicking the pay accounts button, or any of the company names under it, will bring you to the Accounts Details page. Here you can use the dropdown list to select the account you wish to view. You can see your statement balance, your current balance, and twenty-four months of statement history from this screen. Clicking the download icon will download the customer's statement in PDF form. Clicking statement back will download a copy of the backside of the statement. When the customer is ready to make a payment, they would click the Pay Account button.

**Accounts Details**  
12-03401

**Current Balance**  
**\$72.14**  
**Pay**  
Question about your balance?  
**Due Date**  
08/25/2014

**Statement History**

Bill Date	Download	Insert
8/01/2014		
7/01/2014		
5/01/2014		
4/01/2014		
3/01/2014		
2/01/2014		
1/2		

**Statement Details**

John Doe 123 MAIN ST ANYWHERE, OR 55555	Account Number: 12-03401 Bill Date: 8/01/2014 Due Date: 8/25/2014 Statement Balance: \$72.14
---	---

**Callouts:**

- If a customer has multiple accounts, they can select which account they want to view and pay.
- This balance reflects any payments made on the website.
- Clicking the icon will download a pdf copy of the statement.
- If an invoice has an associate insert, this icon will appear. Clicking this will open a popup to select the insert to view.
- The back of the statement can be downloaded here.
- The due date for their latest invoice.

## Pay Account

The Pay Account page is the primary place a customer goes to make a payment. Here they can select whether to pay their balance with a credit card or e-check account. They are given the option to store the information, in which case they would not need to reenter the same information on the next visit. They also have the option to sign up for autopay, so they do not have to worry about making future payments. If the customer has already made a payment in the last 24 hours, a popup box will remind them of this to prevent double payments on their side.

The screenshot shows the 'Pay Account' interface for 'ABC SERVICE'. The page has a green header with the company logo and contact information. A left sidebar contains navigation links like 'Welcome, John Doe', 'Pay Accounts (1)', 'Account Options', 'Financial Information', 'Profile Options', 'Inserts (1)', 'Notifications', 'Pay History', and a 'Logout' button. The main content area is titled 'Pay Account' and has two tabs: 'Pay with a credit card' (selected) and 'Pay with an e-check'. Below the tabs, it shows the current statement balance of \$72.14. The form includes fields for 'AMOUNT(\$): 72.14', 'CARD HOLDER NAME: John Doe', 'CARD NUMBER', 'EXPIRATION DATE' (01 / 2013), 'CVV2', 'BILLING ADDRESS: 123 MAIN ST', 'CITY: ANYWHERE', 'STATE: Oregon', and 'ZIP CODE: 55555'. There are two radio button questions: 'Would you like to store your information?' and 'Would you like to sign up for auto-pay?'. A 'Pay Now' button is at the bottom. Callouts provide additional context: one points to the payment method tabs, another to the credit card logos (VISA, DISCOVER, MASTERCARD, AMERICAN EXPRESS), a third to the 'store your information' option, and a fourth to the 'sign up for auto-pay' option.

If enabled, customers can select whether to pay with a credit card or e-check account.

The specific credit cards accepted can be adjusted, and only the ones allowed will have their logo here.

By selecting to store their information, customers can avoid entering in their account information each time they make a payment. Customers can store multiple forms of payment this first. They can give the stored information a nickname to help them remember which card or bank account they used.

Signing up for autopay will store this payment information and charge any remaining balance on the next autopay date.

## Add Accounts

The Add Accounts feature lets a customer add multiple accounts onto their profile. This is useful for a customer with multiple different accounts as they would now only have to remember one username and password. In addition, the customer only needs to enter their card/account information once in order for it to be used to pay each of those accounts. This also works with multiple companies, so a customer can add both their water bill and garbage bill onto the same profile, with participating utilities.

This will list any accounts that match the customer's name and service address. To add, check the box next to the accounts and click add to profile.

**abc SERVICE** **online-billpay**

Welcome, John Doe

**Pay Accounts (1)**  
ABC SERVICES (1)

**Account Options**  
Add Accounts  
Settings

**Financial Information**  
Payment Profiles  
Manage Autopay

**Profile Options**  
Change personal info  
Change password

**Inserts (1)**

**Notifications**

**Pay History**

**GO PAPERLESS**  
Click for details

**Logout**

### Add Accounts

This feature will allow you to add multiple payment accounts to your profile. With multiple accounts added you will be able to pay multiple bills with a single login.

Would you like to auto-add the following accounts to your profile?

\*Please select the accounts you would like to add

Company	Account #	Service Address
<input type="checkbox"/> ABC SERVICES	12-34572	963 DAWSON CR DR

**Add to Profile**

**Or you can manually add accounts to your profile:**

You will need the following items:

- Unique Identification Number
- Account Number
- Required fields are marked with red asterisks.

\*Account Number:

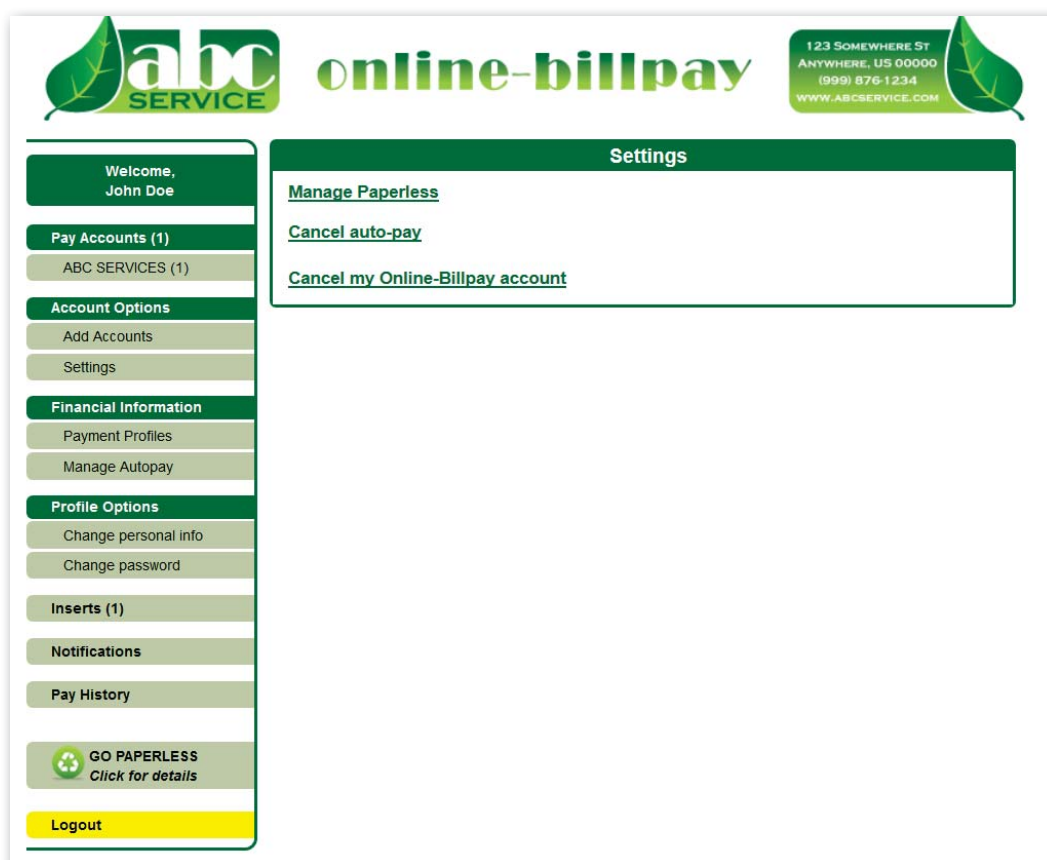
\*Identification Number:

**Add Account**

If an account is not in the list, then the customer can enter in the account information here, using the account number and identification number of the new account.

## Settings

On the Settings page you can remove yourself from autopay or cancel your online-billpay account, or adjust your paperless settings. Canceling your online-billpay account will unregister the account, allowing the user to reregister at a later date if they decide to return. If you have multiple accounts under one login, you can choose to only remove specific accounts.





## Payment Profiles

The payment profiles page allows customers to manage their stored payment information. Each payment profile stores a credit card or bank account information, allowing the customer to easily make a payment. Each profile is given a nickname by the customer, to make it easy for them to distinguish the different profiles. When they first reach the page, the customer needs to select which service provider they want to manage the profiles for, and click Search. This will bring up a list of all profiles stored under the selected company

This will allow customers to store a new credit card or bank account.

Clicking Select next to a profile will bring up information and options for the profile.

Customers can delete their profile at any time.

This will allow the customer to update or change the payment information.

When a card is expired or about to expire, this can be used to update a credit card expiration date without entering the full card information.

The profile's nickname can be edited.

This is used to manage which accounts use the selected profile for autopay.

**ABC SERVICES**

Nickname	Account Type	Creation date	Autopay	
My Visa	Credit Card	8/19/2014	No	Select
Checking at ABC Bank	E-Check	8/19/2014	No	Select
Wife's American Express	Credit Card	8/19/2014	No	Select

**Add New Payment Profile**

Nickname: My Visa  
Account Type: Credit Card  
Name: John Doe  
Card Number: 4\*\*\*\*\*1458  
Valid To: 10/19

**Remove Information**  
**Update Information**  
**Update Exp. Date**  
**Change Nickname**  
**Add Autopay**

## Manage Autopay

The Manage Autopay allows customers to select which payment profile is used for autopay. To start, the customer should select which account they wish to manage autopay for, and click Search. This will bring up the list of profiles the customer can use for autopay. To select which profile is being used for autopay, the customer should click the radio button next to the profile, and then click Change Profile. Until the customer selects Change Profile, the change has not been saved.

The screenshot shows the 'Manage Autopay' page for 'ABC SERVICES'. The page has a green header with the 'online-billpay' logo and contact information. A left sidebar contains navigation links: 'Welcome, John Doe', 'Pay Accounts (1)' (with a sub-link 'ABC SERVICES (1)'), 'Account Options' (with sub-links 'Add Accounts' and 'Settings'), 'Financial Information' (with sub-links 'Payment Profiles' and 'Manage Autopay'), 'Profile Options' (with sub-links 'Change personal info' and 'Change password'), 'Inserts (1)', 'Notifications', 'Pay History', 'GO PAPERLESS Click for details', and 'Logout'. The main content area is titled 'Manage Autopay' and displays 'ABC SERVICES' with account number '12-03401' and a status 'Account is not on autopay'. A 'Back' button is present. Below this, a message states: 'To add this account to autopay, select the payment profile you wish to use and click Add to Autopay.' A table lists three payment profiles: 'My Visa' (Credit Card), 'Cheking at ABC Bank' (E-Check), and 'Wife's American Express' (Credit Card), each with an unselected radio button. To the right of the table are buttons for 'Edit Payment Profiles' and 'Add New Profile'. At the bottom of the table is an 'Add to Autopay' button.

Nickname	Account Type	
My Visa	Credit Card	<input type="radio"/>
Cheking at ABC Bank	E-Check	<input type="radio"/>
Wife's American Express	Credit Card	<input type="radio"/>



## Change Personal Info

This page allows the user to change their personal information as presented on the site. Every time they go to make a payment, their name, address, city, state, and zip will auto populate those fields. It is also the place where the user can change the email address that will receive site notifications, such as when a new bill is ready to be viewed online




123 SOMEWHERE ST  
ANYWHERE, US 00000  
(999) 876-1234  
WWW.ABCSERVICE.COM

Welcome,  
John Doe

Pay Accounts (1)  
ABC SERVICES (1)

Account Options  
Add Accounts  
Settings

Financial Information  
Payment Profiles  
Manage Autopay

Profile Options  
Change personal info  
Change password

Inserts (1)

Notifications

Pay History

GO PAPERLESS  
Click for details

Logout

Edit Profile Details

### Edit Profile Details

You may edit contact information here.

- Required fields are marked with red asterisks.
- Once satisfied with your changes press "Save Changes".

This information is used for Online-Billpay only. Please contact your service provider to change any information on your statement.

Name:

Email:

Telephone:

- Billing Address -

Address 1:

Address 2:

City:

State:

Zip:

Save Changes

Cancel

## Change Password

This page provides a simple interface for the customer to change their password. If the user forgets their password and can't login in to use this feature, there is a password recovery on the home screen.

**abc SERVICE** **online-billpay**

123 SOMEWHERE ST  
ANYWHERE, US 00000  
(999) 876-1234  
WWW.ABCSERVICE.COM

Welcome, John Doe

**Pay Accounts (1)**  
ABC SERVICES (1)

**Account Options**  
Add Accounts  
Settings

**Financial Information**  
Payment Profiles  
Manage Autopay

**Profile Options**  
Change personal info  
Change password

**Inserts (1)**

**Notifications**

**Pay History**

**GO PAPERLESS**  
Click for details

**Logout**

### Change Password

You may edit password information here.

- Enter an old password and a new password.
- Required fields are marked with red asterisks.
- Once satisfied press "Change Password".

- Must contain 5 to 10 characters including one number -

\*Old Password:

\*New Password:

\*Confirm Password:

**Change Password**

### Account Login

User Name:

Password:

**Sign in**

Remember Me: ☒

[Forgot User Name or Password?](#)

Customers should click here if they forget their password. This will let them enter their email address to have an email sent to them with their username and a link to a page where they can choose a new password.

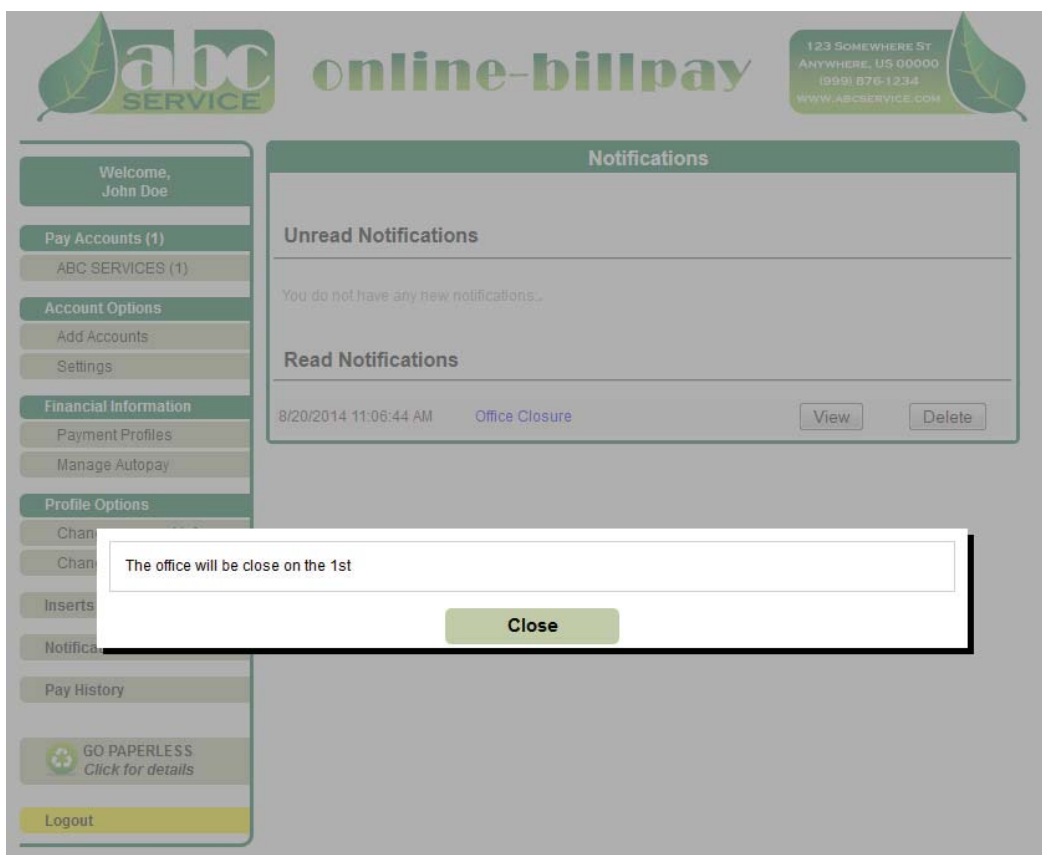
## Inserts

Inserts let customers view pages that would regularly be included on their bill as an insert online. This is especially useful for customers who are paperless as they would not otherwise receive the insert. The inserts are displayed in PDF format and the customer is required to have Adobe Reader to view them.

The screenshot displays the 'online-billpay' web application interface. At the top, the 'abc SERVICE' logo is on the left, the 'online-billpay' text is in the center, and a green box on the right contains the address '123 SOMEWHERE ST ANYWHERE, US 00000', phone number '(999) 876-1234', and website 'WWW.ABCSERVICE.COM'. A left-hand navigation menu lists various options: 'Welcome, John Doe', 'Pay Accounts (1)' (with a sub-item 'ABC SERVICES (1)'), 'Account Options' (with sub-items 'Add Accounts' and 'Settings'), 'Financial Information' (with sub-items 'Payment Profiles' and 'Manage Autopay'), 'Profile Options' (with sub-items 'Change personal info' and 'Change password'), 'Inserts (1)', 'Notifications', 'Pay History', 'GO PAPERLESS Click for details' (with a recycling icon), and a yellow 'Logout' button. The main content area, titled 'Inserts', shows a section for 'ABC SERVICES' with a PDF icon and the text 'Collection Day Checklist'.

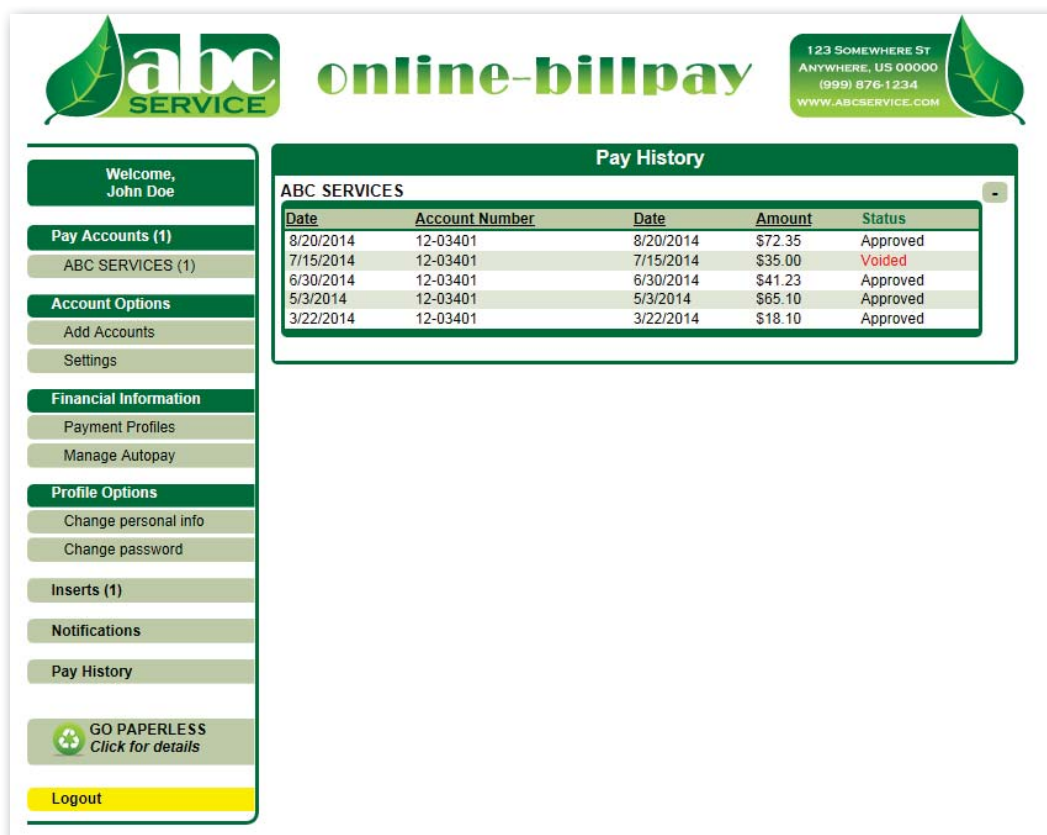
## Notifications

This page will contain all the notifications created for this particular customer. Once a customer reads a notification, it moves from the Read to the Unread section. The customer can then choose to store the message or delete it. The notifications are created though the admin login.



## Pay History

Pay History gives an overview of all payments made on the site. It will also display the status of the payment, whether it's been approved, refunded or voided.



The screenshot shows the 'online-billpay' interface for 'ABC SERVICE'. The left sidebar contains navigation links: 'Welcome, John Doe', 'Pay Accounts (1)' (with a sub-link for 'ABC SERVICES (1)'), 'Account Options' (Add Accounts, Settings), 'Financial Information' (Payment Profiles, Manage Autopay), 'Profile Options' (Change personal info, Change password), 'Inserts (1)', 'Notifications', 'Pay History', 'GO PAPERLESS Click for details', and 'Logout'. The main content area is titled 'Pay History' and displays a table for 'ABC SERVICES'.

Date	Account Number	Date	Amount	Status
8/20/2014	12-03401	8/20/2014	\$72.35	Approved
7/15/2014	12-03401	7/15/2014	\$35.00	Voided
6/30/2014	12-03401	6/30/2014	\$41.23	Approved
5/3/2014	12-03401	5/3/2014	\$65.10	Approved
3/22/2014	12-03401	3/22/2014	\$18.10	Approved

## Paperless

On the bottom of the left menu the paperless button is displayed. Paperless billing allows the customer to stop receiving a paper bill. This saves you money since you no longer have to send out a paper bill, as well as saves the environment by reducing paper waste. The customer can remove themselves from paperless by unchecking the box at any time. Customers can reach this page from the settings page.

**online-billpay**

123 SOMEWHERE ST  
ANYWHERE, US 00000  
(999) 876-1234  
WWW.ABCSERVICE.COM

Welcome, John Doe

**Pay Accounts (1)**

ABC SERVICES (1)

**Account Options**

Add Accounts

Settings

**Financial Information**

Payment Profiles

Manage Autopay

**Profile Options**

Change personal info

Change password

**Inserts (1)**

**Notifications**

**Pay History**

**GO PAPERLESS**  
Click for details

Logout

**Go Paperless**

**Why Go Paperless?**

- Participate in the movement to lower paper waste.
- View your bill and make payments online at anytime from anywhere.
- Save a trip to the mailbox.

**Disclaimer**  
By checking the box(es) below you agree that you will stop receiving paper bills starting from the next billing cycle unless you change the paperless option before the end of your current billing cycle. Any changes made during your current billing cycle may not take effect until the next billing cycle.

Account Number	Company Name	Paperless
12-03401	ABC SERVICES	<input checked="" type="checkbox"/>

Save