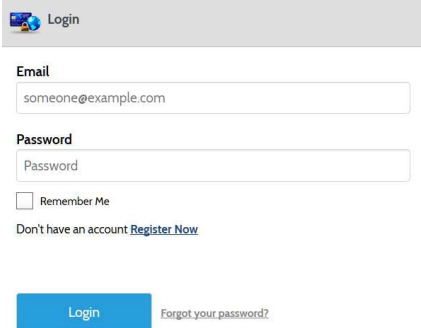


# Using the Customer Portal to Set Up Recurring Payments

## How To Create a New Account in Customer Portal

1. On the Customer Portal home page, select “Register Now”.



The screenshot shows the login interface. At the top is a grey header with a 'Login' button. Below it are two input fields: 'Email' with the placeholder 'someone@example.com' and 'Password' with the placeholder 'Password'. There is a 'Remember Me' checkbox and a link for 'Don't have an account Register Now'. At the bottom, there is a blue 'Login' button and a link for 'Forgot your password?'.

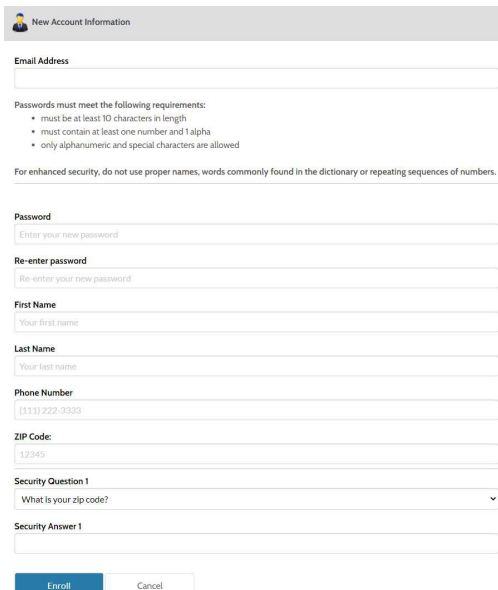
2. Enter all of the required information:

- Email Address
- Password
  - *Note: Ensure that the password created adheres to the requirements on screen.*
- First and Last Name
- Phone Number
- ZIP Code

3. Select a Security Question from the drop-down list.

4. Enter your answer in the Security Answer field.

- *Note: If multiple security questions are required, ensure that all questions are unique and that all are answered.*



The screenshot shows the 'New Account Information' form. It includes fields for 'Email Address', 'Password' (with a note: 'Passwords must meet the following requirements: must be at least 10 characters in length, must contain at least one number and 1 alpha, only alphanumeric and special characters are allowed'), 'Re-enter password', 'First Name', 'Last Name', 'Phone Number' (with a placeholder '(111) 222-3333'), 'ZIP Code' (with a placeholder '12345'), a 'Security Question 1' dropdown menu (with the question 'What is your zip code?'), and a 'Security Answer 1' field. At the bottom, there are 'Enroll' and 'Cancel' buttons.

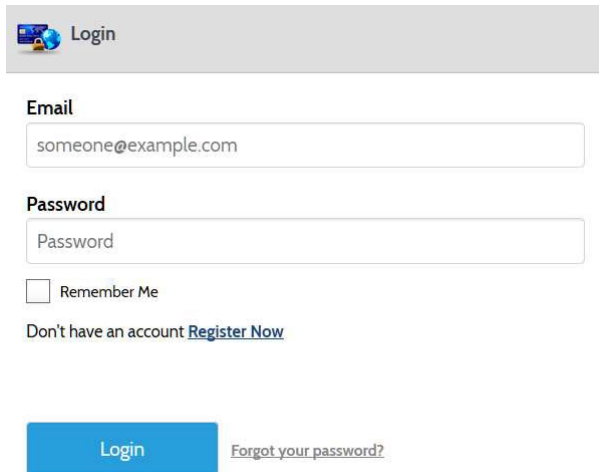
5. Select “Enroll”. You are now registered with a new account for the Customer Portal.

## How To Login to Customer Portal

1. On the Customer Portal home page, enter your Email address and Password.
  - Alternatively, if you do not have an account, select “Register Now” to create a new one.
  - If you have an account and experience issues with logging in, select “Forgot your password?” to recover your login.
2. (Optional) When provided with the option, select “Remember Me” to save your login in the current browser for future use.
3. Select “Login”.

## How To Reset Your CP Login Password

1. On the Customer Portal home page, select “Forgot your password?” beside the Login button.



The screenshot shows the login interface. At the top, there is a grey header with a globe icon and the word "Login". Below this, there are two input fields: "Email" containing "someone@example.com" and "Password" containing "Password". Under the password field, there is a checkbox labeled "Remember Me" which is unchecked. Below the checkbox, there is a link that says "Don't have an account [Register Now](#)". At the bottom, there is a blue "Login" button and a link for "Forgot your password?".

2. When prompted, enter your Customer Portal login email address and select “Continue”.



The screenshot shows a verification page with a grey header that says "Please enter your e-mail address". Below the header, there is an "Email Address" label and an input field containing "testing@paymentus.com". At the bottom, there is a blue "Continue" button.

3. (Optional) If prompted, enter the answers to your security questions in the fields provided below each question.

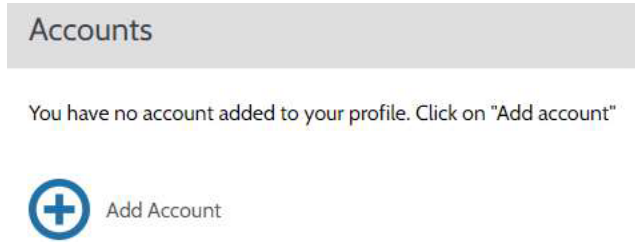


The screenshot shows a security questions page with a grey header that says "Provide answers to security questions". Below the header, there is an "Email Address" label and an input field containing "testing@paymentus.com". There are two more questions with input fields: "What is your zip code?" with the answer "12345" and "What is your first pet name?" with the answer "fido". At the bottom, there is a blue "Reset Password" button.

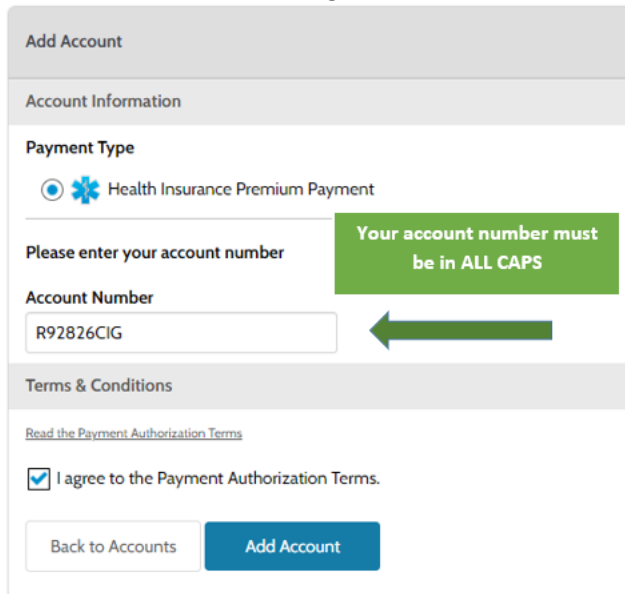
4. Select “Reset Password”. A temporary password will be sent to the email address entered. Follow the instructions provided in the email.

## How To Add a New Account

1. On the Accounts page, select “Add Account” to add an account to your profile.




2. Select a Payment Type and enter your Account Number – Must USE ALL CAPS for Account Number
3. Read and agree to the Payment Authorization Terms by selecting the checkbox next to it.
  - o *Note: You must agree to the terms in order to proceed with adding the account.*



The screenshot shows the 'Add Account' form. The 'Payment Type' section has a radio button selected for 'Health Insurance Premium Payment'. Below this, there is a text input field for the 'Account Number' containing 'R92826CIG'. A green callout box with a white arrow points to the input field, containing the text: 'Your account number must be in ALL CAPS'. Below the input field is a 'Terms & Conditions' section with a link 'Read the Payment Authorization Terms' and a checked checkbox 'I agree to the Payment Authorization Terms.'. At the bottom, there are two buttons: 'Back to Accounts' and 'Add Account'.

4. Select “Add Account”. The Account Created confirmation displays all the relevant account information.



The screenshot shows the 'Account Created' confirmation screen. It displays the following information:

Payment Type	Health Insurance Premium Payment
Account Number	R92826CIG

At the bottom, there is a blue button labeled 'Back to Accounts'.

5. Select Back to Accounts. Your account is now available on the Accounts page.

The screenshot displays the 'Accounts' page with four account cards. Each card includes an account ID, date due, amount due, and buttons for 'Pay Bill', 'AutoPay', and 'Edit'. A 'View All Payments' link is also present at the bottom of each card.

Account ID	Date Due	Amount Due
Health Insurance Premium Payment # R92826CIG	Apr 30, 2023	\$776.04
Health Insurance Premium Payment # C4954CIG	Apr 30, 2023	\$2,328.17
Health Insurance Premium Payment # C6646DDV	Apr 30, 2023	\$114.45
Health Insurance Premium Payment # C90218UHC	Apr 30, 2023	\$193.90

6. From here, you can:

- Edit your account information
- Add additional accounts
- View your payment history
- Remove an Account (through the Edit option)

## How To Pay Your Bill

1. From the navigation panel, select “Pay My Bill”.
2. Select an account from the accounts list.
  - Alternatively, if there are no accounts available in your profile, select Add New.
  - Once added, the account will be displayed in the list

The screenshot shows the 'Pay My Bill' page. It features a 'Select Account(s)' section with a list of accounts, each with a checkbox and a blue asterisk icon. At the bottom, there is an 'Add new' button with a plus sign and a 'Continue' button.

Account ID
Select All
Health Insurance Premium Payment # C12831CIG
Health Insurance Premium Payment # C4954CIG
Health Insurance Premium Payment # C6646DDV

### 3. Select “Continue”

Payment Details

Payments

Add / Remove	Health Insurance Premium Payment	Account Number	Date Due	Amount Due	Payment Amount
	Health Insurance ...	C12831CIG	Apr 30, 2023	\$776.04	776.04

My Wallet

- echeck \*\*5411
- MasterCard \*\*\*\*\*5454 | Exp 05/27
- test+paypal@paymentus.com  
Date added: Apr 18, 2023 - 3:03:44 PM

Add new

Back Continue

### 4. Select a payment method from the available list.

- Alternatively, if there are no payment methods available, select Add new. Then, follow the steps provided in “How to Add a Payment Method to My Wallet.” Once added, the payment method displays in the list.

### 5. Select “Continue”.

### 6. On the Review and Confirm page, ensure that all the information on the page is accurate. To change any information, select “Back” and edit the information, as required.

Review and Confirm

Payment Method \*\*\*\*\*5454

Payments

Health Insurance Premium Payment	Account Number	Payment Amount	Paymentus Fee
Health Insurance Premium Payment	C12831CIG	\$776.04	\$18.24

Payment Amount \$776.04 + Processing Fee \$18.24 = Total Amount \$794.28

By clicking the PAY button, you agree to the service fee charged by Paymentus to be added to this payment and authorize the payment.

Back Pay \$794.28

### 7. Select “Pay” to submit the payment.

- *Note: Paymentus charges a processing fee (For example, \$1.50 for Credit Cards, \$1.00 for Debit Card).*

### 8. The Payment Receipt screen displays confirming that the payment was successful.

- *Note: The payment submission process might take some time. An email notification will be sent to your email address, containing all of the transaction details.*

Payment Receipt

1 of 1 payment(s) have been accepted.

---

Payment 1 of 1

Confirmation #	75111577
Health Insurance Premium Payment	Health Insurance Premium Payment
Account #	C12831CIG
Status	Accepted
Payment Date	Apr 20, 2023 – 4:33:17 PM
Payment Method	MasterCard *****5454
Payment Amount	\$776.04
Processing Fee	\$18.24
Total Amount Charged	\$794.28

---

Combined Payment Amount Charged	\$776.04
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Combined Total Service Fee	\$18.24
----------------------------	---------

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Combined Total Amount Charged	\$794.28
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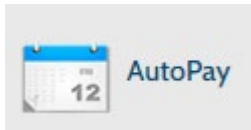
[Print](#) [Make Another Payment](#) [Back to Payment History](#)

9. From here, you can:

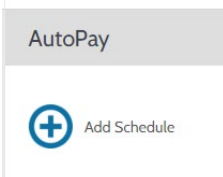
- Make another payment
- Print the page
- View your Payment History

## How to Add an AutoPay Schedule

1. From the navigation panel, select AutoPay.



2. On the AutoPay page, select “Add a Schedule” to create a payment schedule for your account.



3. Select an account for which you want to create a schedule. If one does not exist in the list, select “Add New.”

- *Note: If a schedule already exists for an account, that account is no longer eligible for AutoPay*

Select an Account

- Health Insurance Premium Payment # C12831CIG
- Health Insurance Premium Payment # C4954CIG
- Health Insurance Premium Payment # C6646DDV
- Health Insurance Premium Payment # C90218UHC

Add new

Continue

4. Select “Continue”
5. Select the payment method you want to use for the schedule. This is the payment method that will be charged when the schedule is executed. If one does not exist in the list, select Add new.
6. Select Continue.

Payment Method

My Wallet

- echeck \*\*5411
- MasterCard \*\*\*\*\*5454 | Exp 05/27
- PayPal test+paypal@paymentus.com  
Date added: Apr 18, 2023 - 3:03:44 PM

Add new

Back Continue

7. Select Monthly-fixed amount
  - *Note: Depending on the frequency selected, you must also select a Schedule Day.*

8. (Optional) For frequencies that require a date, select the End Date (Optional) field or select the Calendar icon to select a future date from the Date Picker. The schedule will no longer execute after this date.


Payment Details

**Frequency**

Monthly - fixed amount


---

**Schedule Day**

01 

Please note that a payment scheduled for the current calendar day will be processed next month, if schedule day is greater than the last day of the schedule month then the last day of the month is used for the schedule day.

**End Date (Optional)**

Select end date 

**Payment Amount**

776.04

**Total Amount**

776.04

**Payment Type**

Checking Account

**Routing Number**

\*\*\*\*2161

**Account Number**

\*\*5411

[View Authorization Agreement for direct debit payment \(ACH Debit\).](#)

I authorize ACH direct debit payment (ACH Debit).

By selecting the box, you authorize the above scheduled payments from the account shown. This authorization is valid until you cancel it through the customer portal or by calling your biller's customer service number. Cancellation requests must be received at least 3 business days before the next scheduled payment due date.

[Back](#) [Create AutoPay](#)

9. Read and agree to the Schedule Payment Authorization Terms by selecting the checkbox next to it.
10. Then, select Create AutoPay. The Schedule Created confirmation displays all the relevant schedule information. Your schedule will now be available on the main AutoPay page along with all other schedules.
- From here, you can:
  - Print your schedule confirmation
  - Go back to the AutoPay main page

## How to Edit an AutoPay Schedule


1. From the navigation panel, select “AutoPay.”

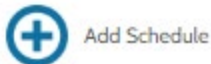


Schedule # 2964053 [Edit](#)

Frequency	Next Payment
Monthly - fixed amount	May 4, 2023
Created By	Start Date
You	Apr 20, 2023

Payment Details [Edit](#)

Payment Method	Payment Amount
 **5411	\$776.04



2. On the AutoPay page, select “Edit” here you can:
  - The schedule details (e.g. Schedule Day, End Date)
  - Remove the Schedule

Schedule Details ×

Frequency


Monthly - fixed amount

Schedule Day

04 ▼

Please note that a payment scheduled for the current calendar day will be processed next month, if schedule day is greater than the last day of the schedule month then the last day of the month is used for the schedule day.

End Date (Optional)

05/05/2023 

Payment Amount

776.04

By selecting the box, you authorize the above scheduled payments from the account shown. This authorization is valid until you cancel it through the customer portal or by calling your biller's customer service number. Cancellation requests must be received at least 3 business days before the next scheduled payment due date.

[Cancel](#) [Confirm](#) [Remove Schedule](#)

## How to View Your Payment History

1. From the navigation panel, select Payment History.
2. On the Payment History page, you can
  - View (all payment made and individually)
  - See the status (Accepted, Failed, etc.)
  - Search
  - Download History

Account	Amount	Processing Fee	Date	Method	Action
Health Insurance Premium Payment # C12831CIG	\$776.04	\$18.24	Apr 20, 2023 - 4:33:17 PM	MasterCard	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$16.47	Apr 18, 2023 - 5:18:48 PM	VISA	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$0.00	Apr 18, 2023 - 5:13:24 PM	achexD	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$16.47	Apr 18, 2023 - 5:12:17 PM	PayPal	View
Health Insurance Premium Payment # C90218UHC	\$700.82	\$16.47	Apr 18, 2023 - 5:10:52 PM	MasterCard	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$0.00	Apr 18, 2023 - 5:10:13 PM	achexD	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$16.47	Apr 18, 2023 - 5:07:46 PM	PayPal	View

## How to Download Your Payment History

1. From the navigation panel, select “Payment History”
2. On the Payment History page, you can view a list of all payments made to different accounts from your profile.

Payment History

Download History Search 1-24 of 24

Account	Amount	Processing Fee	Date	Method	Action
Health Insurance Premium Payment # C12831CIG	\$776.04	\$18.24	Apr 20, 2023 - 4:33:17 PM	MasterCard	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$16.47	Apr 18, 2023 - 5:18:48 PM	VISA	View

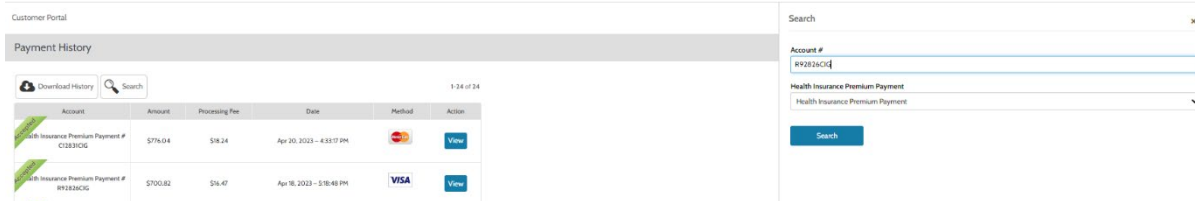
3. Select “Download History” to download your payment history as a CSV file to your computer.
  - *Note: A payment-report.csv file will be downloaded to your computer which you can then open using any software that opens such file formats (e.g. Excel).*

payment-report (32) - Excel

Confirmation Number	Payment Amount	Processing Fee	Total Amount	Payment Type	Account Number	Payment Date/Time	Payment Method Type	Payment Method	Channel	Originator	Status
7511577	776.04	18.24	794.28	Health Insurance Premium Payment	C12831CIG	4/20/2023 16:33	MasterCard	*****5454	Web Channel	appusr	Accepted
75117983	700.82	16.47	717.29	Health Insurance Premium Payment	R92826CIG	4/18/2023 17:18	Visa	*****4448	Web Channel	CONSUMER	Accepted
75117981	700.82	0	700.82	Health Insurance Premium Payment	R92826CIG	4/18/2023 17:13	Savings Account	*****1122	Web Channel	CONSUMER	Accepted
75117938	700.82	16.47	717.29	Health Insurance Premium Payment	R92826CIG	4/18/2023 17:12	PayPal	test-paypal@paymentus.com	Web Channel	CONSUMER	Accepted
75117937	700.82	16.47	717.29	Health Insurance Premium Payment	R92826CIG	4/18/2023 17:10	MasterCard	*****5454	Web Channel	CONSUMER	Accepted

## How to Search/Filter Your Payment History

1. From the navigation panel, select “Payment History”.
2. On the Payment History page, you can view a list of all payments made to different accounts from your profile.
3. Select “Search” to narrow down your payment history list, and search for a specific Account Number.



4. Select “Search” again. The search results will be updated to display only the payments that fit your search Criteria.

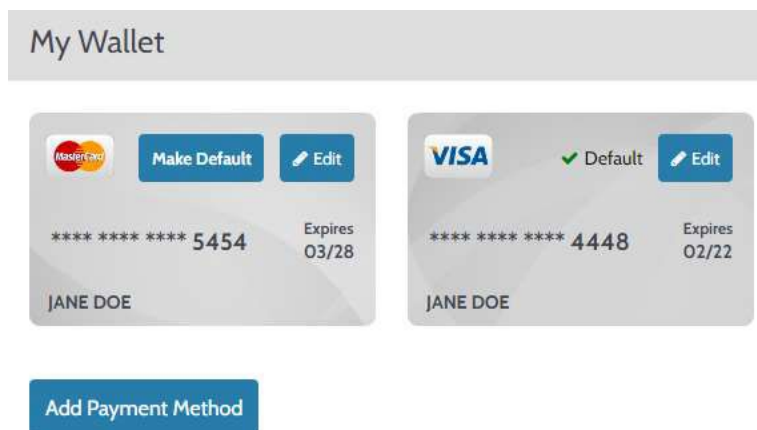
The screenshot shows the 'Customer Portal' interface with the 'Payment History' section. The search filter is applied to the 'Account' column, showing 'R92826CIG'. The search results are filtered to show only payments for 'Health Insurance Premium Payment and Account Number R92826CIG'. The table displays six payment entries.

Account	Amount	Processing Fee	Date	Method	Action
Health Insurance Premium Payment # R92826CIG	\$700.82	\$16.47	Apr 18, 2023 - 5:18:48 PM	VISA	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$0.00	Apr 18, 2023 - 5:13:24 PM	eches	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$16.47	Apr 18, 2023 - 5:12:17 PM	Paycom	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$16.47	Apr 18, 2023 - 5:10:52 PM	MasterCard	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$0.00	Apr 18, 2023 - 5:10:13 PM	eches	View
Health Insurance Premium Payment # R92826CIG	\$700.82	\$16.47	Apr 18, 2023 - 5:07:46 PM	Paycom	View

5. From here, you can select “View” to view more details

## How to Add a Payment Method to My Wallet

1. From the navigation panel, select “My Wallet”
  - o *Note: If you do not currently have any saved payment methods to your wallet, the wallet displays as empty.*



## 2. Select “Add Payment Method”

**Add Payment Method** ✕

Credit Debit E-Check Digital Wallets

VISA MasterCard AMERICAN EXPRESS DISCOVER

Card Number CVV ⓘ

Card number CVV

Expiration Date

MM YYYY

Card Holder Name

Card holder name

[Click to read the Payment Authorization Terms](#)

I authorize payment and agree to the Payment Authorization Terms

Set as default payment method

Back Add

3. Enter all of the required payment method information (e.g. Card Number, CVV, Expiration Date, Card HolderName, Routing Number, etc.)
4. Read and agree to the Payment Authorization Terms by selecting the checkbox next to it.
5. (Optional) Select “Set as default payment” method to use it as the default payment method for all future payments.
6. Alternatively, for all Digital Wallets such as PayPal, PayPal Credit, Venmo, GPay, Apple Pay select the corresponding button. You will be redirected to the third party's website.

**Add Payment Method** ✕

E-Check Debit Credit **Digital Wallets**

PayPal

PayPal CREDIT


V

Want to pay with Venmo? Add your Venmo account to your wallet with your mobile device to pay on any device after ⓘ

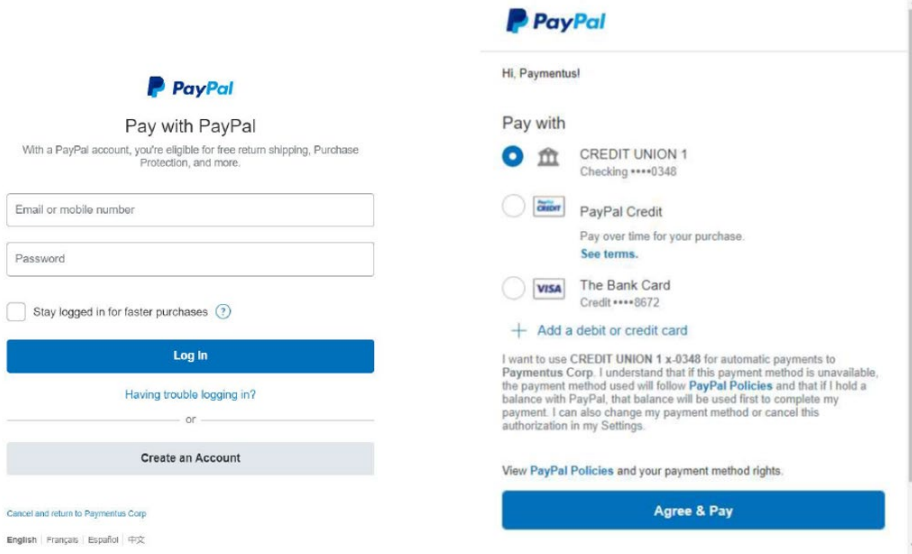
G Pay

Set as default payment method

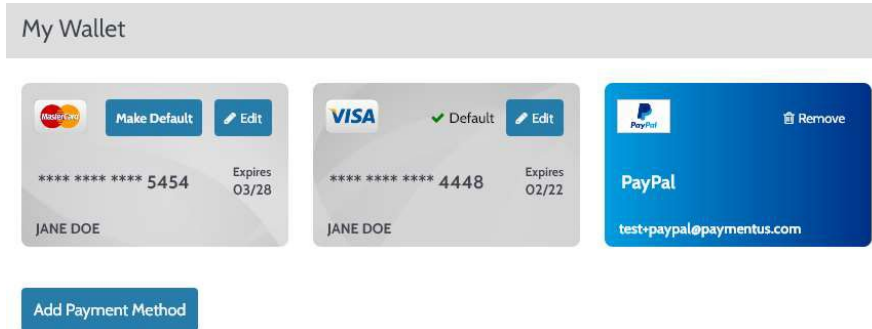
Back

 Want to use Apple Pay? Sign in from Safari on your iPhone, iPad, or Mac.

7. In the pop-up window that opens, log in using your credentials and select the payment method of your choice, for example PayPal.

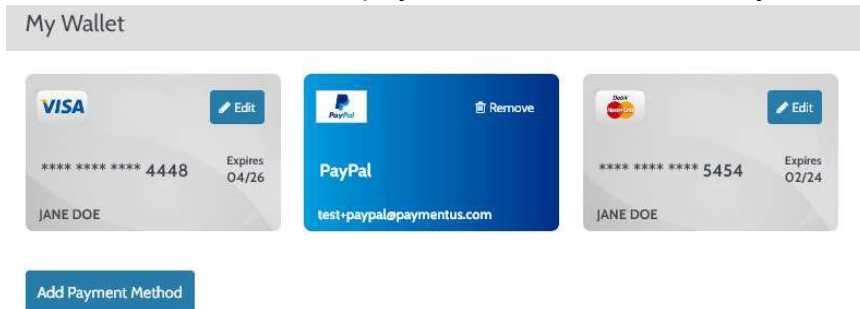


8. The My Wallet page will be updated with your newly added payment methods.

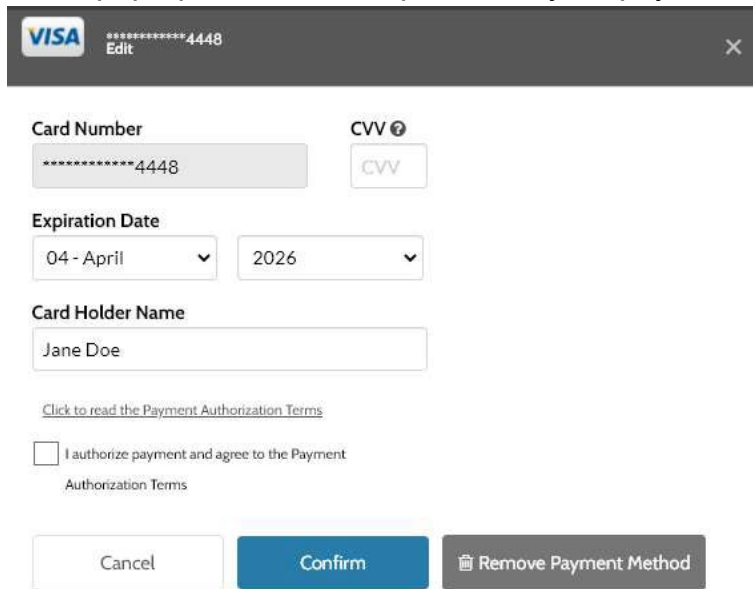


## How to Edit an Existing Payment Method

1. From the navigation panel, select "My Wallet"
  - o *Note: If you do not currently have any saved payment methods to your wallet, the wallet displays as empty.*
2. From the list of available payment methods saved to your wallet, select "Edit"



3. In the pop-up window that opens, edit your payment method information as required.



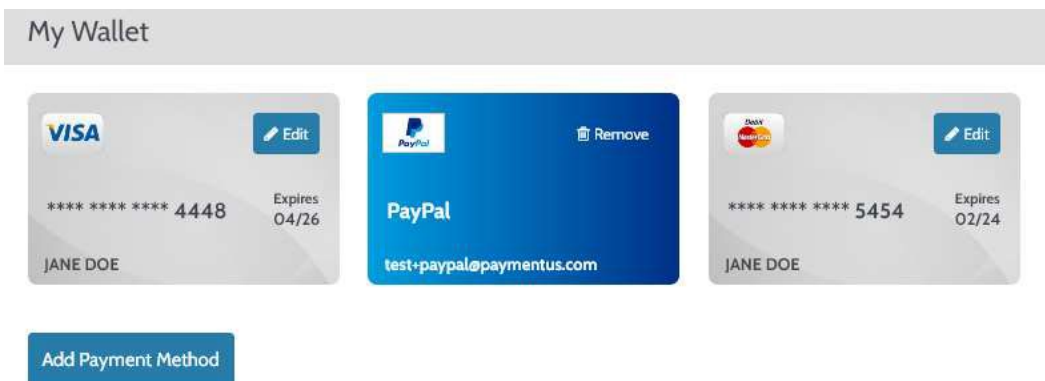
The screenshot shows a dark-themed pop-up window titled "VISA" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Card Number:** A text input field containing "\*\*\*\*\*4448".
- CVV:** A text input field containing "CVV".
- Expiration Date:** Two dropdown menus. The first is set to "04 - April" and the second to "2026".
- Card Holder Name:** A text input field containing "Jane Doe".
- Authorization Terms:** A checkbox labeled "I authorize payment and agree to the Payment Authorization Terms" is currently unchecked. A link "Click to read the Payment Authorization Terms" is positioned above the checkbox.
- Buttons:** Three buttons are located at the bottom: "Cancel" (white), "Confirm" (blue), and "Remove Payment Method" (grey with a trash icon).

4. Read and agree to the Payment Authorization Terms by selecting the checkbox next to it.
5. Select "Confirm." Your payment method will be updated with the latest edits.

## How to Remove a Payment Method

1. From the navigation panel, select "My Wallet"
  - *Note: If you do not currently have any saved payment methods to your wallet, the wallet displays as empty.*
2. From the list of available payment methods saved to your wallet, select "Edit"
  - Alternatively, select Remove directly on the saved wallet entry to remove the payment method from the list.



3. In the pop-up window that opens, select “Remove Payment Method”.

A dark-themed pop-up window with a Visa logo and a close button (X). The window contains the following fields and controls:

- Card Number:** A text input field containing "\*\*\*\*\*4448".
- CVV:** A text input field containing "CVV".
- Expiration Date:** Two dropdown menus, the first showing "04 - April" and the second showing "2026".
- Card Holder Name:** A text input field containing "Jane Doe".
- Terms:** A link "Click to read the Payment Authorization Terms" and a checkbox "I authorize payment and agree to the Payment Authorization Terms".
- Buttons:** Three buttons at the bottom: "Cancel", "Confirm", and "Remove Payment Method".

4. When prompted, select “Confirm” to proceed with the payment method removal. The payment method is no longer available on the My Wallet page, in the list of available wallet entries.

A light-themed confirmation dialog with a Visa logo and a close button (X). The dialog contains the following text and controls:

- Text:** "Please confirm removal of this payment method." and "Please note all AutoPay schedules associated with this payment method will be removed as well."
- Buttons:** Two buttons at the bottom: "Cancel" and "Confirm".

## How to Change Your Login Password

1. From the navigation panel, select “My Profile”
2. In the Login Details section, enter your current password and then enter your new password.
  - o *Note: Ensure that the new password adheres to the requirements on screen.*

The screenshot shows a user profile page with two main sections:

- General Details:** Fields for First Name (jane), Last Name (Doe), Email Address (jd@paymentus.com), Phone Number ((555) 555-555x5), Mobile Number, ZIP Code (12345), and Attachment Password.
- Login Details:** Fields for User ID, Current password, New password, and Re-enter new password. Below these fields are password requirements: must be at least 10 characters in length, must contain at least one number and 1 alpha, and only alphanumeric and special characters are allowed. A note at the bottom states: "For enhanced security, do not use proper names, words commonly found in the dictionary or repeating sequences of numbers."

At the bottom of the page, there is a "Security Questions" section with a question "What is your zip code?" and a "Save Changes" button.

3. Select “Save Changes”. The Details confirmation page displays all your profile information.

Details

User Id

First Name Jane

Last Name Doe

Email Address jdoe@paymentus.com

Phone Number (555) 555-5555

ZIP Code: 12345

Security Question 1 What is your zip code?

Security Answer 1 \*\*\*\*\*

[Back to My Profile](#)

## How to Edit Your Contact Details

1. From the navigation panel, select “My Profile”.
2. In the General Details section, edit your contact information as required

General Details

First Name  
Jane

Last Name  
Doe

Email Address  
jdoe@paymentus.com

Phone Number  
(555) 343-7777

Mobile Number

ZIP Code:  
12345

Attachment Password  
Attachment Password

This password is used for opening bill summary email attachments.

3. Once you are done, select “Save Changes”. The Details confirmation page displays all your profile information.

## How to Change Your User ID

1. From the navigation panel, select “My Profile”
2. In the Login Details section, select “click here”
  - *Note: The User ID field, which was previously grayed out, is now unlocked and can be edited.*

Login Details

User ID:

Your User Id has to be alphanumeric or dash, underscore or a valid email address.

If you want to change your user id [click here](#)

3. Enter a new User ID.
  - *Note: The new User ID must be alphanumeric and may contain a dash or an underscore, or it can be a valid email address.*
4. Enter your Current password.
  - *Note: You must enter your current password to change your ID.*
5. Select Save Changes. The Details confirmation page displays all your profile information.

Details

User Id

First Name Jane

Last Name Doe

Email Address jdoe@paymentus.com

Phone Number (555) 555-5555

ZIP Code: 12345

Security Question 1 What is your zip code?

Security Answer 1 \*\*\*\*\*

[Back to My Profile](#)

## How to Edit Your Security Questions

1. From the navigation panel, select “My Profile”
2. In the Security Questions section, select “Edit”

Security Questions Edit

**Security Question 1**  
What is your zip code?

**Security Answer 1**  
●●●●●●●●

3. In the Security Questions pop-up window that opens, enter your Current Password.
4. Select a Security Question from the drop-down list.
5. Enter your Security Answer to the selected question.
6. Select “Save Changes” to save the edits made to the profile.
7. The Details confirmation page displays all your profile information.

Details

User Id ██████████

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First Name Jane

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Last Name Doe

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Email Address jdoe@paymentus.com

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Phone Number (555) 555-5555

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ZIP Code: 12345

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Security Question 1 What is your zip code?

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Security Answer 1 \*\*\*\*\*

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