

## ePay Portal – Quick Reference

### Step-By-Step-Quick Pay

#### Quick Pay

1. Navigate to the provided URL address. The business to you which you are making a payment may also have a website with a link to the address.
2. Select the **Pay Now** option. This may read differently for each business website.



3. Complete the required fields. Click Continue when completed.

The screenshot shows a payment form with the following fields: "Service:" (dropdown menu), "Pay This Amount:" (text input with "Required" below it), "Description:" (text input), "Reference Number:" (text input), "Payment Type:" (dropdown menu), "Account Type:" (dropdown menu), "Name On Account:" (text input with "Name on account is required" below it), "Is Business Account:" (checkbox), "Address:" (text input with "ADDRESS IS REQUIRED" below it), "Suite/Apt #:" (text input), "City, State, Zip:" (text input with a dropdown menu for "State" and "Zip" below it), "Country:" (text input with "US" below it), "Email Address:" (text input with "Email address is required" below it), and "Confirm Email Address:" (text input with "Confirm Email Address is required" below it). At the bottom are checkboxes for "Register and Save Payment Information" and buttons for "CANCEL" and "CONTINUE".

4. The **Payment Confirmation** page gives you the opportunity to verify the data and authorize the debit from your account. You may also go back to make any necessary changes by selecting the **Back** option.
5. Read the **Check Authorization Agreement** and, if acceptable, select the check box next to **I accept this agreement**.
6. Select Agree and Submit.

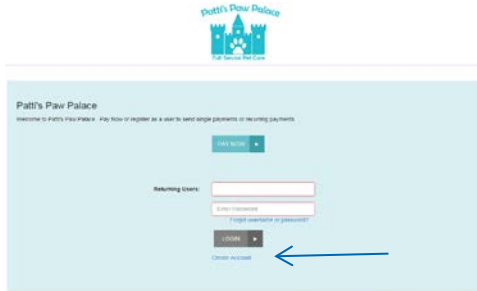


7. Click **Print Receipt** to get a paper copy of the transaction or **Save Receipt** to save a copy.

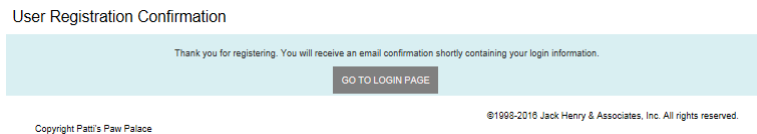


## Registering as a User

1. Navigate to the provided URL address. The business to which you are making a payment may also have a website with a link to the address.
2. Select **Create Account** to register your information. This option may read differently on the website itself.



3. The **User Registration** page appears. Complete all the required fields. Select **Register** when finished.
4. A **User Registration** confirmation window will appear, and an email will be sent to the indicated address. Select **Go to Login Page**.



## Payment Accounts

### Adding a Payment Account

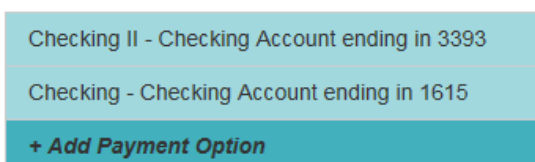
1. Select **Edit payment Options** and then **Add Payment Options** at the bottom of the page to create accounts (checking or credit card) that you may want to debit for a payment/donation.
2. Complete the required fields.
3. Click **Add Payment**.
4. An **Add Account** confirmation window will display.

Payment Options

Payment option added successfully.

### Edit a Payment Account

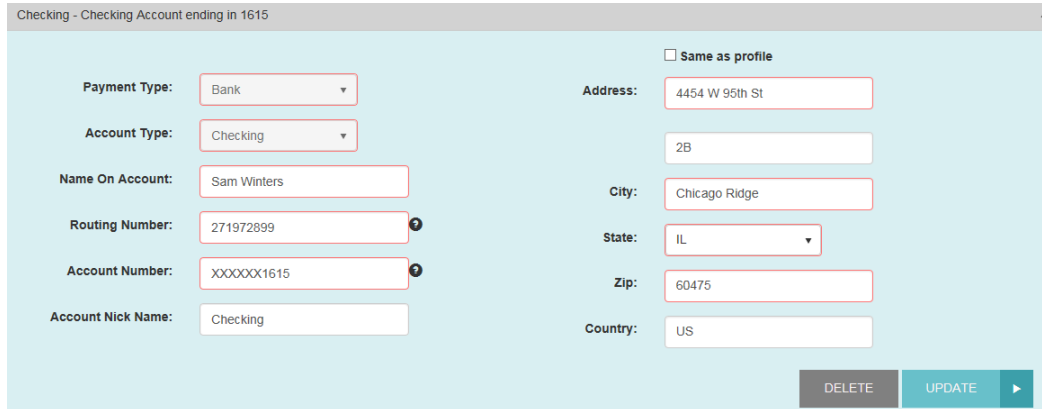
1. From the navigational links on the top, select **Edit Payment Options**.
2. The **Payment Options** will appear at the bottom of the page. To view and/or make changes to an account, select the account name.



3. The **Edit Account** page appears. Make any changes necessary, and select **Save**.

### Deleting a Payment Account

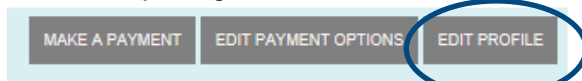
1. From the navigational links on the top, select **Edit Payment Options**.
2. From the **Payment Option** section, select the account name and click **Delete** next to the account you want to erase.



3. The system will prompt you to confirm deleting an account. Select **Yes** to continue.
4. The system will confirm the deletion of the account. Select **Close**.

### Updating Your Profile

1. From the top navigational bar, select the **Edit Profile** option.



2. The **User Profile** page appears. This page contains three sections of information you may update:
  - **User profile information** – Personal contact information for the profile.
  - **Password information** – Password information for the profile.
  - **Secret question/answer information** – Secret question and answer setup for security purposes in the event you have keyed in login information incorrectly at least five times.
3. Update the necessary information in each section and select the Update option when completed.

## Payments

### Create a Single Payment

1. Select **Make a Payment** from the navigational bar on the left. The **Make Payment** page will appear.

Pay This Amount: Required

Service: --Select--  Remember this selection

Pay From Account: --Select--

Description:

Reference Number:

Payment Date: 12/20/2018

[Click here if you would like to make this a recurring payment](#)

2. Fill in the required fields.
3. Select **Continue**.
4. The **Payment Confirmation** page will display with the opportunity to verify the data and authorize the debit/charge, or to go back for any necessary changes. The figure below illustrates a payment confirmation for a payment made using a check.

#### Confirmation

Amount: \$102.00

Service: Walking & Watching

From Account: Checking

Notes: Week1

Authorization Agreement:

I, **Sam Wonters**, authorize **Patti's Paw Palace** to electronically debit my account for the amount indicated above.

I agree to have sufficient funds in my account for the transaction above, and understand that my financial institution may assess fees if there are insufficient funds in my account. I acknowledge that it will not be the responsibility of **Patti's Paw Palace** to pay any transaction fees that may be assessed by my financial institution.

In the case of a returned transaction, I authorize the resubmission of the entry and, as applicable, an additional debit of the above account up to the state maximum return fee amount.

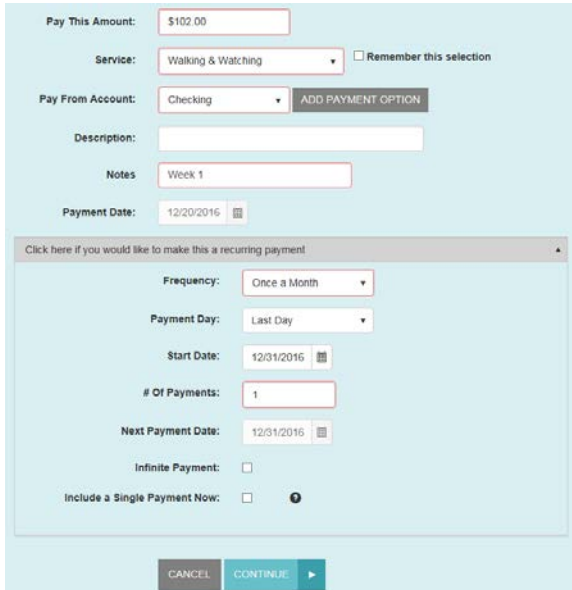
My entry of the information above and the acceptance of this agreement shall be my signature to execute this transaction.

The acceptance of this agreement may be revoked, prior to the processing of this transaction, by contacting us at 800-894-6900.

5. Read the **Check Authorization Agreement** or **Credit Card Charge Authorization Agreement**. If acceptable, select the check box next to **I accept this agreement**.
6. Click **Submit**.
7. A **Transaction Receipt** window appears. Select **Print Receipt** to print a copy for your records or **Save Receipt** to save a copy to your device.

### Create a Recurring Payment

1. Select **Make a Payment** from the navigation bar to the left.
2. The **Make a Payment** page appears.



Pay This Amount:

Service:   Remember this selection

Pay From Account:

Description:

Notes:

Payment Date:

Click here if you would like to make this a recurring payment

Frequency:

Payment Day:

Start Date:

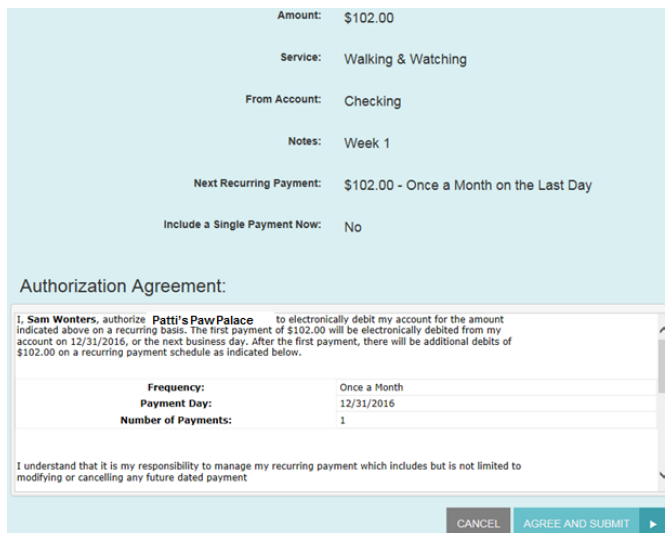
# Of Payments:

Next Payment Date:

Infinite Payment:

Include a Single Payment Now:

3. Fill in the following required fields.
4. Click **Continue** at the bottom of the page.
5. The **Recurring/Future Dated Payment** Confirmation page displays with the opportunity to verify the data and authorize the payment(s), or to go back for any necessary changes.



Amount: \$102.00

Service: Walking & Watching

From Account: Checking

Notes: Week 1

Next Recurring Payment: \$102.00 - Once a Month on the Last Day

Include a Single Payment Now: No

Authorization Agreement:

I, **Sam Wonters**, authorize **Patti's PawPalace** to electronically debit my account for the amount indicated above on a recurring basis. The first payment of \$102.00 will be electronically debited from my account on 12/31/2016, or the next business day. After the first payment, there will be additional debits of \$102.00 on a recurring payment schedule as indicated below.

Frequency:	Once a Month
Payment Day:	12/31/2016
Number of Payments:	1

I understand that it is my responsibility to manage my recurring payment which includes but is not limited to modifying or cancelling any future dated payment

6. Click **Submit** at the bottom of the page. A window will appear confirming the payment(s) to be made.

Response: Successfully created recurring payment.

Amount: \$102.00

Service: Walking & Watching

Account #: Checking

Transaction Date: 12/20/2016 3:01 PM

Notes: Week 1

## Manage a Recurring Payment

1. To make changes to a recurring payment, go back to the **Welcome** page and double-click on the recurring payment.

Next Payment Date	Amount	Location	
In 9 Days	\$102.00	Walking & Watching	Enabled
In 11 Days	\$102.00	Walking & Watching	Enabled

Amount:  Service:  Select Account:

Frequency:  Payment Day:  Start Date:

# Of Payments:  # Payments Made:  Next Recurrence:

Infinite Payment  Enabled  Delete Payment

2. The **Edit Recurring** page appears. Make any changes necessary, and select **Submit**.

## Deleting a Recurring Payment

From the **Edit Recurring** page, select the **Delete Payment** box to permanently remove the recurring payment, and select **Submit**.

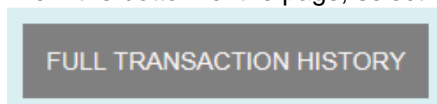
## Disable a Recurring Payment

From the **Edit Recurring** page, uncheck the **Enabled** box to suspend the recurring payment, and select **Submit**.

## Reports

### Payment History

3. From the bottom of the page, select **Full Transaction History**.



4. The **Payment History** page appears.
5. Enter the date range you want to view and select Run Report.
6. The payment history can also be exported to Excel or a PDF file.



### Transaction History

From Date: 12/20/2016  
To Date: 12/21/2016  
RUN REPORT  
Excel EXPORT

Transaction Date	Amount	Payment Type	Status	Name On Account	Location	Description	Reference Number	Reference Number
Year: 2016								
12/20/2016 03:05 PM	\$50.00	Checking	Approved	Sam Winters	Walking & Watching		Week2	9C43FBLGSA2