

Payment Portal Reference Guide



Table of Contents

- ◆ [How to Create an Account/Register for electronic payments](#)
- ◆ [How to Make a Payment](#)
- ◆ [How to Add Additional Customer Numbers to your Profile](#)
- ◆ [How to Download a Copy of your Invoice](#)
- ◆ [How to sign up for Automatic Recurring Payments \(ACH and Credit Card\)](#)
- ◆ [Update billing address or invoice delivery method](#)



Creating an Account



Creating an Account

Step 1: Click on Link to get to payment portal Login Screen- [EASYPay - EASYCommerce \(payinvoicedirect.com\)](https://payinvoicedirect.com)

Step 2: To create an account, click on don't have an account

The image shows a login form with the following elements:

- Username:** A text input field.
- Password:** A text input field.
- LOGIN:** A blue button.
- Remember me?**
- 2** (a small number)
- Don't have an account?** (a link, highlighted with a red box)
- Forgot Password?** (a link)

Sample of Invoice and where to find Customer Number, Invoice Number, and Zip Code . *Use the zip code on the payment coupon.

DETACH DOCUMENT ALONG PERFORATION. ENCLOSE AND RETURN THIS COUPON WITH YOUR PAYMENT.

11760 US HWY 1 Suite W600 Palm Beach Gardens FL 33408

First Otis Buidling
1234 Otis Drive
West Palm Beach, FL 12345

C

CUSTOMER NO.:

A

12345678

DATE:

6/15/2020

INVOICE NO.:

B

100400000005

TOTAL SERVICE CONTRACT AMOUNT:

\$ 194.98

MAKE CHECK PAYABLE TO:

Delta Beckwith
PO Box 13716
Newark NJ 07188-0716

100400012736 0000019498 5

Fill in all fields and click Continue

**Make sure the zip code is from the payment portion of the invoice*

PROVIDE YOUR REGISTRATION INFORMATION

Customer Account Number*

Invoice Number*

Zip Code* (from payment coupon portion of invoice)

First Name* Last Name*

Email Address*

Password*

Confirm Password*

Password requires: at least 6 alphanumeric characters; requires at least one letter and one digit.

[Clear](#) | **CONTINUE**

The first screen you will be taken to is all open invoices on the account.

Making a Payment



Making a Payment

To make a payment, click on the invoices you wish to pay in the box next to the open amount. When you click on the box, the open amount will default into the payment amount field.

395943

MENU ▾

View Open Invoices

Exact Search Date Range Invoice Number Range

Invoice Number: From Date: Invoice Number From:

Invoice Date: To Date: Invoice Number To:

Document Type: ▾

Total of All Open Invoices: \$15,905.35

Invoice Number	Document Type	Invoice Date	Days Past Due	Due Date	Total Amount	Open Amount	<input type="checkbox"/>	Payment Amount	
100401355841	Maintenance Invoice	10/24/2023	0	11/1/2023	\$364.00	\$364.00	<input type="checkbox"/>	<input type="text"/>	Print
SSA15822 001	Open Order Invoice	10/20/2023	10	10/20/2023	\$1,953.00	\$1,953.00	<input type="checkbox"/>	<input type="text"/>	Print
100401340889	Maintenance Invoice	10/17/2023	0	11/1/2023	\$9,797.00	\$9,615.00	<input type="checkbox"/>	<input type="text"/>	Print
100401340902	Maintenance Invoice	10/17/2023	0	11/1/2023	\$414.00	\$414.00	<input type="checkbox"/>	<input type="text"/>	Print
SSA15837 001	Open Order Invoice	10/13/2023	17	10/13/2023	\$695.00	\$695.00	<input type="checkbox"/>	<input type="text"/>	Print
SSA15833 001	Open Order Invoice	10/16/2023	24	10/16/2023	\$480.00	\$480.00	<input type="checkbox"/>	<input type="text"/>	Print

After selecting the invoices for payment, select proceed to payment button in the bottom right corner. (Important to note that if you do not include the full open amount of the invoice in the payment amount field, it will prompt you to enter a reason for not paying the full amount.)

395943

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

MENU ▼

View Open Invoices

Exact Search

Invoice Number:

Invoice Date:

Document Type: -All Types-

Date Range

From Date:

To Date:

Invoice Number Range

Invoice Number From:

Invoice Number To:

FIND INVOICES

Total of All Open Invoices: \$15,905.3

Invoice Number	Document Type	Invoice Date	Days Past Due	Due Date	Total Amount	Open Amount	<input type="checkbox"/>	Payment Amount	
100401355841	Maintenance Invoice	10/24/2023	0	11/1/2023	\$364.00	\$364.00	<input checked="" type="checkbox"/>	<input type="text" value="364"/>	Print
SSA15822 001	Open Order Invoice	10/20/2023	10	10/20/2023	\$1,953.00	\$1,953.00	<input checked="" type="checkbox"/>	<input type="text" value="1953"/>	Print
100401340889	Maintenance Invoice	10/17/2023	0	11/1/2023	\$9,797.00	\$9,615.00	<input type="checkbox"/>	<input type="text"/>	Print
100401340902	Maintenance Invoice	10/17/2023	0	11/1/2023	\$414.00	\$414.00	<input type="checkbox"/>	<input type="text"/>	Print
SSA15837 001	Open Order Invoice	10/13/2023	17	10/13/2023	\$695.00	\$695.00	<input type="checkbox"/>	<input type="text"/>	Print
SSA15832 001	Open Order Invoice	10/6/2023	24	10/6/2023	\$480.00	\$480.00	<input type="checkbox"/>	<input type="text"/>	Print
100401147451	Maintenance Invoice	4/17/2023	182	5/1/2023	\$414.00	\$414.00	<input type="checkbox"/>	<input type="text"/>	Print
SSA15573 001	Open Order Invoice	4/14/2023	139	6/13/2023	\$1,970.35	\$1,970.35	<input type="checkbox"/>	<input type="text"/>	Print

After clicking proceed to payment, you will be taken to this screen below where you can choose payment method that you have previously saved, add a new payment method, and also have the option to split the payment between multiple payment methods saved on your account. (We are unable to accept credit card payments of over \$49,999.00, or on new equipment or modernization invoices. There is no limit on the amount accepted by e-check)

Invoices Selected for Payment

Invoice Number	Invoice Type	Invoice Company	Currency	Amount Applied	Paid Amount	Remaining Amount	
200000020130	New Equipment/Mod Invoice	00130	BSD	49,000.00	0.00	63,097.38	REMOVE


GO BACK REMOVE ALL UNPAID LINES

Reason for not paying full invoice amount:

This field is required if total payment amount does not match total open invoice amount

Choose a payment method

Your saved payment methods

+  Pay with new method Credit Card eCheck

Total Summary

Subtotal :	49,000.00
Tax :	0.00
Total :	49,000.00
Remaining Balance :	49,000.00
	BSD

Use this payment method

When payment has been successfully completed, you will receive an email with the below information:

Paid Invoices										
Invoice #	Pay Item	Type	Company	Amount Applied	Discount Taken	Paid Amount	Remaining Amount	Status	Payment Id	Batch Number
110400093819	001	Maintenance Invoice	00110	100.00	0.00	100.00	2,348.12	Complete		

Transaction History								
Account	Transaction Type	Amount	Gateway Transaction Id	Authorization Number	Message	Status	Created	Created By
XXXXXXXXXXXX1111	SALE	100	5ED7C01327F9EB17A99F745A8B8E774F094D53C8		Approved and Completed	APPROVED	2020/06/03 15:22:12	sean.qa@test.com

Hovering over menu as shown below will bring up an option menu to see receipts for past payments, manage payment profiles, and change your settings.

The screenshot displays a web application interface. At the top, there is a search bar with the value '395943' and two buttons: 'CHANGE CUSTOMER NUMBER' and 'UPDATE BILLING PREFERENCES'. A 'Log OUT' button is located in the top right corner. A 'MENU' dropdown is open, showing options: 'OPEN INVOICE & PAYMENT', 'PAID INVOICES/RECEIPTS' (highlighted with a red box), 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER', 'CHANGE PASSWORD', 'CONTACT FORM', 'AUTOPAY ACCOUNTS', and 'UPDATE BILLING PREFERENCES'. Below the menu, there are search filters for 'Date Range' (From Date and To Date) and 'Invoice Number Range' (Invoice Number From and Invoice Number To). A 'FIND INVOICES' button is positioned below these filters. At the bottom right, it states 'Total of All Open Invoices: \$15,905.35'.

Adding additional customer numbers to your profile




Adding additional customer numbers to your profile

Hover over menu and select add new customer number.

This screenshot shows the top navigation bar with a customer ID dropdown (395943), 'CHANGE CUSTOMER NUMBER', and 'UPDATE BILLING PREFERENCES' buttons, along with a 'LOG OUT' link. The 'MENU' dropdown is open, listing options: 'OPEN INVOICE & PAYMENT', 'PAID INVOICES/RECEIPTS', 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER' (highlighted), 'CHANGE PASSWORD', 'CONTACT FORM', 'AUTOPAY ACCOUNTS', and 'UPDATE BILLING PREFERENCES'. Below the menu is a search section with 'View Open Invoices', 'Exact Search', and filters for 'Invoice Number:', 'Invoice Date:', and 'Document Type:'. There are also 'Date Range' and 'Invoice Number Range' filters with 'From Date' and 'To Date' inputs. A 'FIND INVOICES' button is present, and the total of all open invoices is shown as \$15,905.35.

This screenshot shows the 'PROVIDE YOUR REGISTRATION INFORMATION' form. It includes three input fields: 'Customer Account Number*', 'Invoice Number*', and 'Zip Code*'. At the bottom, there is a 'Clear' link and an 'ADD ACCOUNT' button. The top navigation bar is identical to the previous screenshot.

You will then be able to add additional accounts and toggle between them by clicking on the change customer number and selecting from the drop down.

723946 
723946
49275108

CHANGE CUSTOMER NUMBER

PROVIDE YOUR REGISTRATION INFORMATION

Customer Account Number*

Invoice Number*

Zip Code*

[Clear](#) | ADD ACCOUNT

Paying on Consolidated Invoices

If the invoice is consolidated (multiple contracts with different customer #'s), the payment must be made under each individual customer Number. (Follow steps to add multiple customer #'s)

The example below is of a consolidated invoice, you will see that the invoice number is repeated but under separate customer numbers. Each customer number should be added separately.

Invoice Number	Customer Number	Doc Co	Pay Item	Billing Line Number	Invoice Date	Pay Inst	Gross Amount	Open Amount	G/L Offset	Contract Number
100400001688	416346	00100	001		06/15/2020		1,236.00	1,236.00	0004	96103
100400001688	416349	00100	001		06/15/2020		1,854.00	1,854.00	0004	96130
100400001688	416350	00100	001		06/15/2020		1,854.00	1,854.00	0004	96134
100400001688	416351	00100	001		06/15/2020		1,854.00	1,854.00	0004	96137
100400001688	416346	00100	001		06/15/2020		26,883.00	5,171.40	0004	96715
							33,681.00	11,969.40		

How to Download a copy of your invoice



How to Download a copy of your invoice

If you need a copy of your invoice, you can click on print next to the open amount.

The screenshot shows a web interface for account management. At the top right, there is a customer ID '49275108' with a dropdown arrow, and two orange buttons: 'CHANGE CUSTOMER NUMBER' and 'UPDATE BILLING PREFERENCES'. A 'LOG OUT' button with a shopping bag icon is also present.

The main section is titled 'ACCOUNT' and contains a 'New Open Invoices' section. This section has three search filters: 'Exact Search' (with fields for Invoice Number, Invoice Date, and Document Type), 'Date Range' (with fields for From Date and To Date), and 'Invoice Number Range' (with fields for Invoice Number From and Invoice Number To). A 'FIND INVOICES' button is centered below these filters.

Below the filters, a summary states 'Total of All Open Invoices: \$63,097.38'. A table lists the invoices with columns: Invoice Number, Document Type, Date, Days Past Due, Due Date, Total Amount, Open Amount, a checkbox, and Amount. The first row shows an invoice with an open amount of 49000.00. A 'Print' button is located next to this amount and is highlighted with a red box.

At the bottom right, there is a 'PROCEED TO PAYMENT' button. A footer at the bottom left shows navigation arrows and the text 'Total record found: 1. Displaying record 1 to 1.'

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount	<input checked="" type="checkbox"/>	Amount	Print
200000020130	New Equipment/Mod Invoice	1/31/2020	178	1/31/2020	\$588,908.88	\$63,097.38	<input checked="" type="checkbox"/>	49000.00	Print

Currently, only maintenance and new equipment and modernization invoices billed after 10/15 can be downloaded.

All other invoices will download a reference article that contains pertinent invoice information, but is not an exact copy of the original invoice. If you need a copy of the original invoice, please request it [by clicking here](#). Below is an example of the Reference article you will see.

REFERENCE ARTICLE				
INVOICE NO. 20000002 U5		PAGE 1 of 1		
DATE 1/31/2020	ORDER #			
CUST NO. 49275108				
TAX I.D.	TAX CERTIFICATE			

BILL TO:
 First Otis Building
 1234 Otis Boulevard
 West Palm Beach, FL 12345

*Customer payment portal is being upgraded to display our newly formatted invoices. While we go through this process, you will be able to access your invoice information here, through this reference article. The customer information, bill to address, and invoice # and amount due shown here matches the information in the invoice mailed to you. Please reach out to NSAA.Collections@otis.com if you have any questions.

CURRENCY	ORDER DATE	CUSTOMER P.O.	TRANSPORT	
BSD				
SHIPPING INSTRUCTIONS				
LINE	DESCRIPTION / ITEM NUMBER	QTY SHIPPED	PRICE	EXTENDED PRICE
001		1	588908.88	588908.88

Recurring Payment Set Up (Credit Card or ACH)



How to set up Automatic Payments on Your Account

Make sure you have a payment profile saved first.

From your home screen when you login, click on Menu and select Autopay Accounts from the dropdown list.

The screenshot shows a web application interface. At the top, there is a header with a customer number '395943' in a dropdown, and two orange buttons: 'CHANGE CUSTOMER NUMBER' and 'UPDATE BILLING PREFERENCES'. A 'LOG OUT' button with a shopping bag icon is on the right. Below the header is a dark blue navigation bar with 'MENU' and a dropdown arrow. A mouse cursor is pointing at the dropdown arrow. A dropdown menu is open, listing several options: 'OPEN INVOICE & PAYMENT', 'PAID INVOICES/RECEIPTS', 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER', 'CHANGE PASSWORD', 'CONTACT FORM', 'AUTOPAY ACCOUNTS' (highlighted with a red box), and 'UPDATE BILLING PREFERENCES'. Below the menu is a search section with 'Exact Search' and fields for 'Invoice Number:', 'Invoice Date:', and 'Document Type:'. To the right of these fields are 'Date Range' and 'Invoice Number Range' sections, each with 'From Date:' and 'To Date:' fields and calendar icons. An orange 'FIND INVOICES' button is centered below the search fields. At the bottom right, it says 'Total of All Open Invoices: \$15,905.'. Below this is a table with columns: Invoice Number, Document Type, Invoice Date, Days Past Due, Due Date, Total Amount, Open Amount, a checkbox, Payment Amount, and a 'Print' link.

Invoice Number	Document Type	Invoice Date	Days Past Due	Due Date	Total Amount	Open Amount	<input type="checkbox"/>	Payment Amount	
100401355841	Maintenance Invoice	10/24/2023	0	11/1/2023	\$364.00	\$364.00	<input type="checkbox"/>	<input type="text"/>	Print
SSA15822.001	Open Order Invoice	10/20/2023	10	10/20/2023	\$1,953.00	\$1,953.00	<input type="checkbox"/>	<input type="text"/>	Print
100401340889	Maintenance Invoice	10/17/2023	0	11/1/2023	\$9,797.00	\$9,615.00	<input type="checkbox"/>	<input type="text"/>	Print

On the next screen click Add New Autopay Account as shown below:

275917 CHANGE CUSTOMER NUMBER UPDATE BILLING PREFERENCES LOG OUT

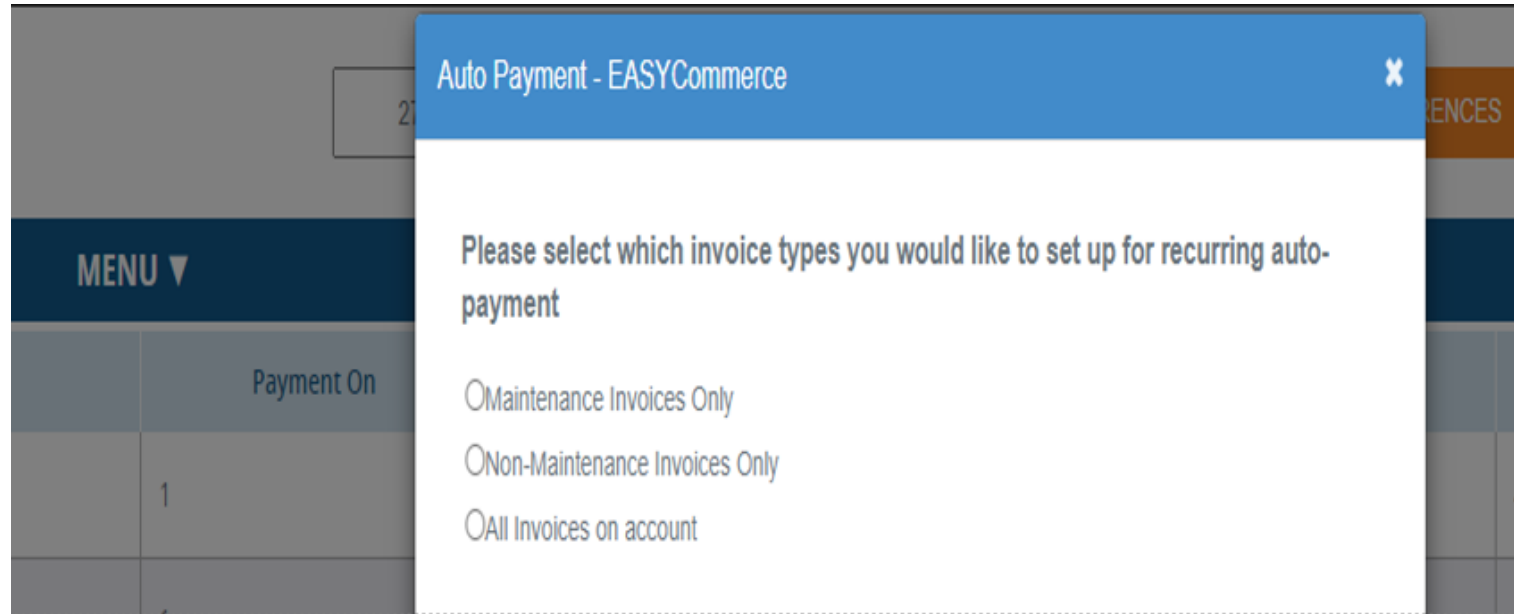
ACCOUNT				
Payment Profile	Payment On	Contract	Customer Number	
Visa ending in 6785	27	16414	314085	DELETE
Visa ending in 6785	27	16407	314085	DELETE
EB ending in 5236	31		98467477	DELETE

<< < > >> Total records found: 3. Displaying record 1 to 3.

ADD NEW AUTOPAY ACCOUNT

Select the invoice type that you would like to set up for recurring payment:

- **Maintenance Invoices Only** – invoices billed per the service contract
- **Non-Maintenance Invoices Only** – invoices for services outside the scope of the service contract including modernization and/or new construction
- **All Invoices on account** – both maintenance and non-maintenance invoices



If **Maintenance Invoices Only** is selected the following screen will open and the contract #(s) will display.

- Click the box next to the contract(s) # that you would like to set up for recurring payments.
- If there are open invoices, you will see the question shown below under Contracts. You will need to choose one of the options to move forward. (if you select to pay you will have the choice to select the invoice(s) to pay or all invoices)
- If there are no open invoices on the account, that question will not appear.

Example - Open Invoices

The screenshot shows a window titled "Auto Payment - EASYCommerce". The main heading is "Please select which invoice types you would like to set up for recurring auto-payment". There are three radio button options: "Maintenance Invoices Only" (selected), "Non-Maintenance Invoices Only", and "All Invoices on account". Below this is a "Contracts:" section with a checked checkbox for "31077". A question follows: "Would you like to process payment now on any open invoices? (Payment will be processed today and then scheduled going forward)". There are two radio button options: "I would like to pay invoices currently open on my account" (selected) and "I do not want to pay any open invoices today". At the bottom, there is a section "Please select invoices to be paid today" with a "Select All" checkbox and two individual invoice checkboxes: "L10000023597 - \$1,424.17" and "100401262077 - \$39.20".

Example – No Open Invoices

The screenshot shows a window titled "Auto Payment - EASYCommerce". The main heading is "Please select which invoice types you would like to set up for recurring auto-payment". There are three radio button options: "Maintenance Invoices Only" (selected), "Non-Maintenance Invoices Only", and "All Invoices on account". Below this is a "Contracts:" section with a checked checkbox for "23620". The question "Would you like to process payment now on any open invoices?" is absent. Instead, there is a question: "What day of the month would you like to set for your recurring payment?" with a dropdown menu showing "1". At the bottom, there is a section "Please select payment profile for your recurring payment" with a dropdown menu showing "Visa ending in 3929".

If selecting **Non - Maintenance Invoices Only** or **All Invoices on account**

- If there are open invoices, you will see the question shown below. You will need to choose one of the options to move forward. (if you select to pay you will have the choice to select the invoice(s) to pay or all invoices)
- If no open invoices that question will not appear.

Example - Non- Maintenance

Auto Payment - EASYCommerce

Note: Only ACH/ECP accounts can be selected for AutoPayment with this customer number

Please select which invoice types you would like to set up for recurring auto-payment

Maintenance Invoices Only

Non-Maintenance Invoices Only

All Invoices on account

Would you like to process payment now on any open invoices? (Payment will be processed today and then scheduled going forward)

I would like to pay invoices currently open on my account

I do not want to pay any open invoices today

Please select invoices to be paid today

Select All

L10000026242 - \$8,728.57

220243840100 - \$557.00

Example – All Invoices on account

Auto Payment - EASYCommerce

Maintenance Invoices Only

Non-Maintenance Invoices Only

All Invoices on account

Would you like to process payment now on any open invoices? (Payment will be processed today and then scheduled going forward)

I would like to pay invoices currently open on my account

I do not want to pay any open invoices today

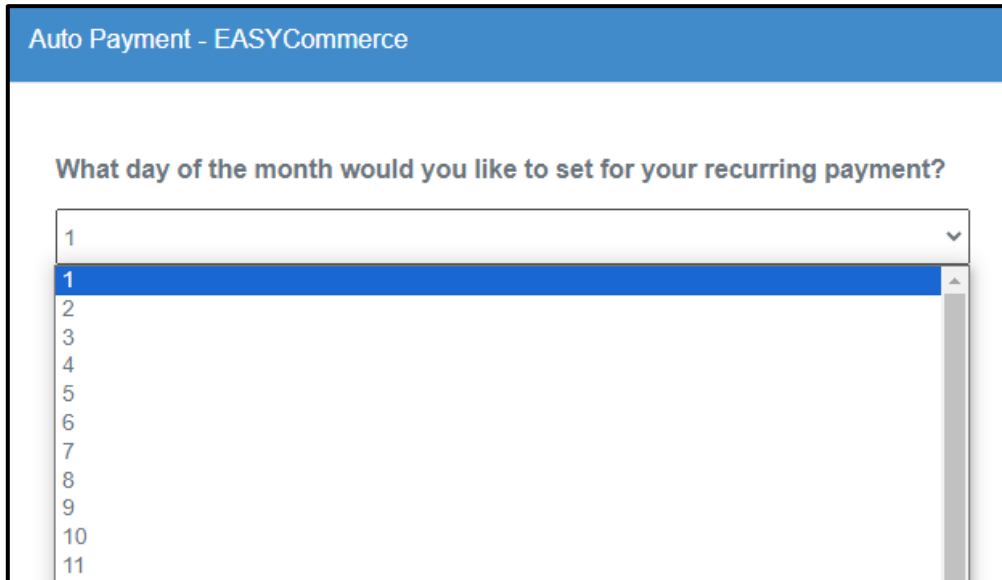
Please select invoices to be paid today

Select All

L10000026242 - \$8,728.57

220243840100 - \$557.00

Select the day of the month that you want to have your payment withdrawn or charged to your credit card. Then choose the payment profile that you want to use for the recurring payments. then choose one of the Referred by options and click Add Autopay Account.



Auto Payment - EASYCommerce

What day of the month would you like to set for your recurring payment?

1

1

2

3

4

5

6

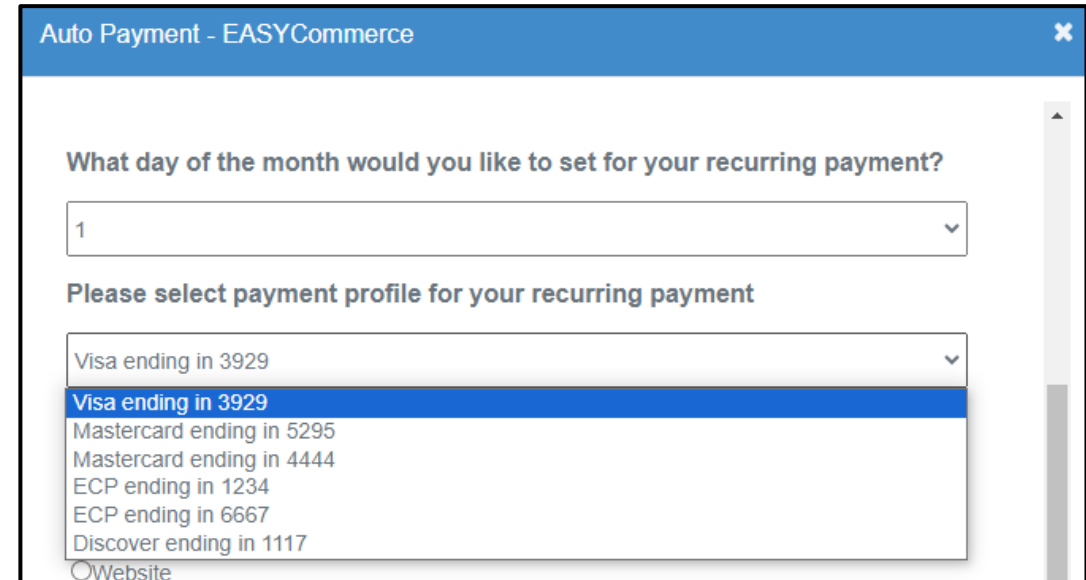
7

8

9

10

11



Auto Payment - EASYCommerce

What day of the month would you like to set for your recurring payment?

1

Please select payment profile for your recurring payment

Visa ending in 3929

Visa ending in 3929

Mastercard ending in 5295

Mastercard ending in 4444

ECP ending in 1234

ECP ending in 6667

Discover ending in 1117

Website

Make sure to select an option under Referred by, click the add autopay account and you will receive a message stating AutoPay account created successfully.

Auto Payment - EASYCommerce

What day of the month would you like to set for your recurring payment?

1

Please select payment profile for your recurring payment

Visa ending in 3929

Referred By

- Sales Representative
- Accounts Receivable Specialist
- Website
- Other

ADD AUTOPAY ACCOUNT

Auto Payment - EASYCommerce

AutoPay account created successfully

OK

All Invoices on account

Updating Billing Preferences



Click on the orange button or from the drop down menu

395943 LOG OUT

MENU ▼

- OPEN INVOICE & PAYMENT
- PAID INVOICES/RECEIPTS
- MANAGE PAYMENT PROFILES
- ADD NEW CUSTOMER NUMBER
- CHANGE PASSWORD
- CONTACT FORM
- AUTORAY ACCOUNTS
-

View Open Invoices

Exact Search

Invoice Number:

Invoice Date:

Document Type:

Date Range

From Date:

To Date:

Invoice Number Range

Invoice Number From:

Invoice Number To:

Total of All Open Invoices: \$15,905.00

Invoice Number	Document Type	Invoice Date	Days Past Due	Due Date	Total Amount	Open Amount	<input type="checkbox"/>	Payment Amount	
100401355841	Maintenance Invoice	10/24/2023	0	11/1/2023	\$364.00	\$364.00	<input type="checkbox"/>	<input type="text"/>	Print
SSA15822 001	Open Order Invoice	10/20/2023	10	10/20/2023	\$1,953.00	\$1,953.00	<input type="checkbox"/>	<input type="text"/>	Print
100401340889	Maintenance Invoice	10/17/2023	0	11/1/2023	\$9,797.00	\$9,615.00	<input type="checkbox"/>	<input type="text"/>	Print

From there, you can switch to paperless invoicing, change your billing address, update contact information or request invoice copies. (Please allow 1 week for billing changes to take effect)

Invoice Request and Contact Update

First name *	Last name *
<input type="text"/>	<input type="text"/>
Email *	Customer Number *
<input type="text"/>	<input type="text"/>

If you need a copy of your invoices, please select from the options below.
You can request up to 10 specific invoices. If you need more than 10, please select ALL.

All open invoices
 Specific invoices

If you would like to make changes to your Accounts Payable contact, please select from the options below.

I would like to add an additional Accounts Payable contact.
 I would like to replace the existing Accounts Payable contact.

Check this box if you would like a copy of your current statement. Receive email communication from Otis on product information and offers/discounts

To set-up email invoice delivery or update your billing address, [please click here](#).



Thank You