InvoiceCloud Customer Portal Manual

Last verified by Chris Scharling on 06-28-2022

InvoiceCloud Customer Portal Manual.pptx

Login

To login without an account, click the **button** that corresponds to the invoice type you need to pay.

If you have registered for an account, click **Sign In**.

If you need help signing in, click **Forgot your Password?** on the **Sign In** screen. Enter your **Email Address** then click **Recover My Password**.

Registering for an Account

1. After selecting the invoice to pay, use the search tools to search by your **account number** or **last name.**
2. Click **Search Invoices**.
3. In the **Search Results** screen, check the box for **your account**.
4. Click **Register Customer**.
5. Enter your **email address** in the **Email Address** field, then enter it again in the **Confirm Email Address** field.
6. Enter a **password** and confirm it in the **Confirm Password** field.
7. Check the **box** if you'd like to sign up for Paperless billing.
8. If more than one account type is available, choose the service you'd like to be notified for.
9. Click **Complete Registration.**

Your Account At A Glance

This screen displays a variety of account options.

From here you can **Pay Invoices**, **Manage Your Accounts,** view **Recent Open Invoices**, **Recent Closed Invoices**, **Recent Payments**, **Upcoming Scheduled Payments**, and your status regarding **AutoPay**, **Paperless**, and **Pay By Text**.

Click the home icon (🏠) any time to return to this page.

Payment Methods

From any screen, you can add, edit, or view history for your Payment Methods. Your information is always double
encrypted.

1. Click the **My Profile** link at the top of the screen.
2. Tap **Payment Methods**.

ADD A PAYMENT METHOD:

1. Click either **+ Add New Credit/Debit Card** or **+ Add New Bank**.
2. Confirm the details using the available fields.
3. Click **Save**

EDIT A PAYMENT METHOD:

1. Click **Edit** in the table.
2. Confirm the new details for the payment method.
3. Click Save

Delete a Payment Method:

1. Click **Delete** in the table.
2. Confirm that you want to delete the Payment Method.

View Payment Method History:

1. Click **History** in the table.
2. Review the details

Pay My Invoice

1. From **Your Account At A Glance**, click **Pay My Invoices**.
2. **Select** the invoice you need to pay, then click **Pay Selected**.
3. Choose whether you'd like to **Pay Today** or **Schedule a Payment**, then click **Proceed to Payment.**
4. Confirm your payment method and choose the payment amount if available, then click **Continue to Payment Information**.

5. Review your **Payment Information.** Choose whether to enroll in **AutoPay**, **Paperless**, or **Pay By Text**
.
6. Confirm the **invoice type**, then check the box to agree to terms and conditions.
7. Click **Process Payment**

AutoPay

1. From **Your Account At A Glance**, click **AutoPay**.
2. Click **+ New AutoPay Setup**.
3. Select the **Account** and **Invoice Type** you'd like to set up for AutoPay.
4. Choose a Payment Method, then click **Yes, put me on AutoPay. By enabling AutoPay, I agree to the InvoiceCloud**
Payer Terms and Conditions.
5. Click **Save this AutoPay Setup.**

Pay by Text

1. From **Your Account At A Glance**, click **Pay By Text**.
2. Check the **Sign up for Pay By Text** box.
3. Enter your **phone number,** including the area code.
4. Click **Save my changes.**
5. You will have **60 minutes** to complete the signup process from your mobile phone.
6. If you don't complete it in time, simply repeat these steps.

Paperless

1. From **Your Account At A Glance**, click **Paperless**.
2. Select **Yes** for the account you'd like to receive Paperless statements for.
3. Agree to the InvoiceCloud Payer Terms and Conditions by **checking** the box.
4. Click **Save my Changes.**

My Account

Use the **My Account** menu at the top of the screen to:

- View or Pay Open Invoices
- View Paid or Closed Invoices
- View Scheduled Payments

- View your Payment History.

My Profile

Use the **My Profile** menu at the top of the screen to:

- Set up **AutoPay**
- Change Your **Password**
- Manage other **accounts** associated with your profile or email address
- Set up **Paperless**
- Configure **Payment Methods**
- Set up **Pay By Text**
- View **Recurring Scheduled Payments**
- Update **Account Information**
- Update Your **User Information**

Support

Use the **Support** menu at the top of the screen to access a series of helpful videos.

Managing Accounts

1. From the top menu, click **My Profile**.
2. Click **Manage Accounts**.

Reviewing Your Account Details

1. Click **+** by your name to view additional details.

Adding an Account:

1. Click **+ Add Account**
2. Select the Invoice Type to find accounts.
3. Enter an **Account Number** or **Last Name**, then click **Search Accounts**.
4. Select the **box** for the customer account you'd like to link.
5. Click **Add to my profile**.
6. If prompted, enter the password for the linked account.
7. Click Add Account.

Removing an Account:

1. Click **+** next to the name of the account you wish to remove.
2. Click **Remove this account from my profile**.
3. Enter your **Password**.
4. Click **Remove this Account**.