

# InvoiceCloud Customer Portal User Manual

# 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**.

The screenshot shows a web page titled "Pay or View Bills" for "Your Utility". At the top right, there is a "Sign In" link with a yellow arrow pointing to it. Below the title, a message says "Please select an item below to get started." There are two buttons: "Utility Bill" and "Birth Certificates", both with yellow arrows pointing to them. On the right side, there is contact information: "Need help? Contact us at (555) 555-0102", a link "How does it work?", and a "PayPal" logo. Below the buttons, there is a paragraph: "Our Utility office is excited to offer residents an easy and convenient method to view and pay their utility bills online." This is followed by logos for payment methods: eCHECK, VISA, DISCOVER, Mastercard, PayPal, PayPal CREDIT, venmo, Apple Pay, and G Pay. At the bottom, there are three columns of benefits: "Fast and Easy" (with a rabbit icon), "Safe and Secure" (with a lock icon), and "Eco-Friendly" (with a leaf icon). Each column has a short description. At the very bottom, it says "Powered By InvoiceCloud", "Privacy Policy", and "Trustwave Secure Site".

# 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**.


## Register

Please fill out this form to complete your registration. All required fields are marked with a \*.  
[Click here for information on linking accounts together.](#)

**Chris Scharling TEST Account #: \***


<b>Email Address *</b>	<input type="text" value="email@example.com"/>	<b>Confirm Email Address *</b>	<input type="text" value="email@example.com"/>
<b>Create Password *</b>	<input type="password" value="....."/>	<b>Password Strength</b>	<div style="background-color: #28a745; color: white; padding: 2px;">Strong</div>
<b>Confirm Password *</b>	<input type="password" value="....."/>	<b>Password Strength</b>	<div style="background-color: #28a745; color: white; padding: 2px;">Strong</div>

 I would like to sign up for Paperless

I understand that at any time, I can print out my bill and/or decide to receive paper bills by editing my online profile. Please select the Invoice Types on the right you wish to go Paperless for.

In order to complete your enrollment, you must verify receipt of the *Paperless Registration Information* email which will be sent to your email address on record for each Invoice Type selected.

<input checked="" type="checkbox"/> Utility Services
<input checked="" type="checkbox"/> Birth Certificates

Registrant hereby acknowledges that he or she is the valid, authorized signatory for this account, with full responsibility for decisions related to this account, and that the Registrant agrees to the following Terms and Conditions. [Click to view Terms and Conditions](#) .

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.

## Your Account At A Glance

### I Want To...

[Pay My Invoices](#) >

[Manage My Accounts](#) >

- [AutoPay](#)  Not Enrolled >
- [Paperless](#)  Not Enrolled >
- [Pay By Text](#)  Not Enrolled >

### Recent Open Invoices >

Invoice Date	Due On	Balance Due
6/7/2022	7/1/2022	\$143.45

### Recent Closed Invoices >

Invoice Date	Account #
5/9/2022	UTIL-1001
4/10/2022	UTIL-1001
3/23/2022	UTIL-1001

### Recent Payments >

Payment Date	Account #	Amount
5/29/2022	UTIL-1001	\$100.74
4/28/2022	UTIL-1001	\$109.00
4/14/2022	UTIL-1001	\$117.34


### Upcoming Scheduled Payments >

No History Available

# 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**.

Saved Payment Methods		
Manage your Payment Methods		
<a href="#">+ Add New Credit/Debit Card</a>		
<a href="#">+ Add New Bank</a>		
Summary	Date/Time Added (CST)	
 <b>Visa ending in 1111</b> ★ <b>Your Default</b> Expires 12/2025	6/7/2022	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">History</a>

## 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.

Open Invoices

+ Filters

Select	Invoice	Invoice Date	Balance Due	
<input checked="" type="checkbox"/>	<b>Due in 9 days</b> Account #UTIL-1001 Utility Services	6/7/2022	<b>\$143.45</b>	<a href="#">View Invoice</a> <a href="#">Payment History</a> <a href="#">Adjustment History</a> <a href="#">Scheduled Payment History</a> <a href="#">Refresh History</a> <a href="#">Remind Me</a>

Pay Selected >

Payment Options    Payment Information    **Review Payment**

### Review your Information

<b>Your Credit/Debit Card</b> <a href="#">Edit</a> Deana Ada XXXXXXXXXXXX1111 12 / 2025 	<b>Billing Address</b> 7532 State Street boston,ma 02110 malcarez@invoicecloud.com
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Enroll me in AutoPay

Enroll me in Paperless

<b>Account:</b> Deana Ada	<b>Email Address:</b> malcarez@invoicecloud.com	<b>Type:</b> <input checked="" type="checkbox"/> Utility Services
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Enroll me in Pay by Text

**Payment Summary**

Invoice #	Amount
1001-1587 - <a href="#">View</a>	\$143.45
<b>SUBTOTAL</b>	\$143.45
<b>SERVICE FEE *</b>	+ \$4.23
<b>GRAND TOTAL</b>	<b>\$147.68</b>

\*A non-refundable service fee of \$4.23 is included in your total.  
[Fees Disclosure](#)

I agree to the [Invoice Cloud Payer Terms and Conditions](#), for this payment and Paperless Enrollment.

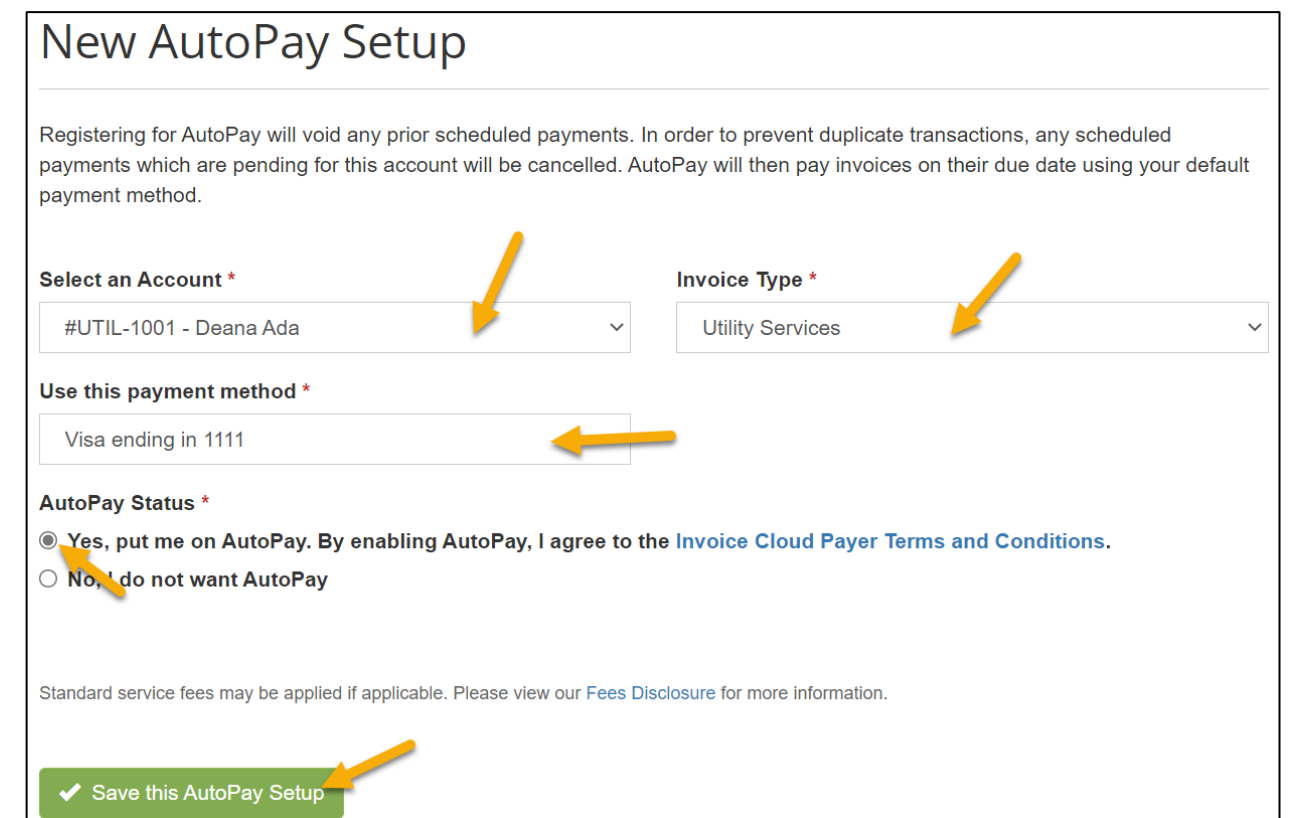
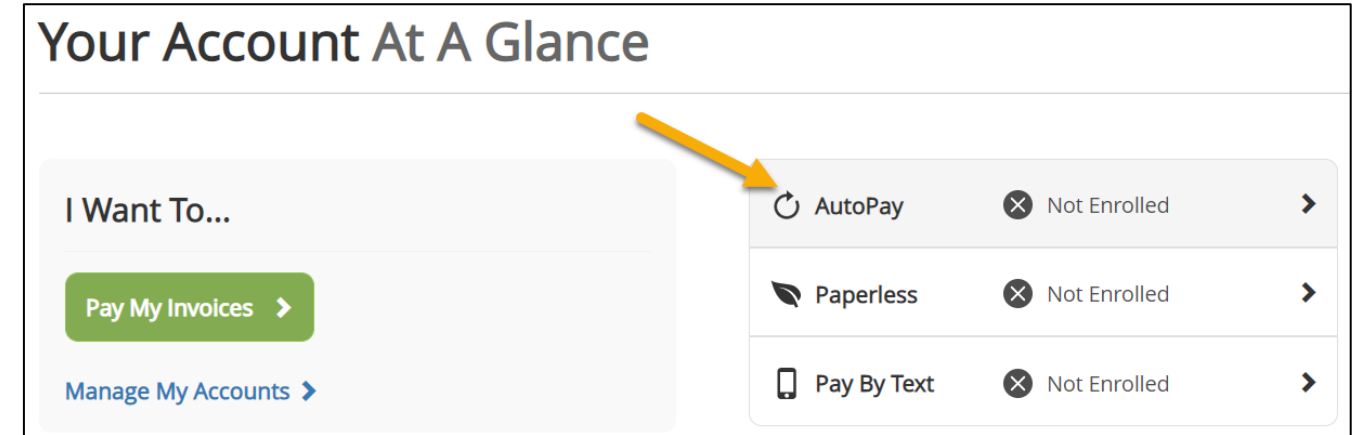
**Process Payment \$147.68**

[Cancel Payment](#)

[Need Help?](#)

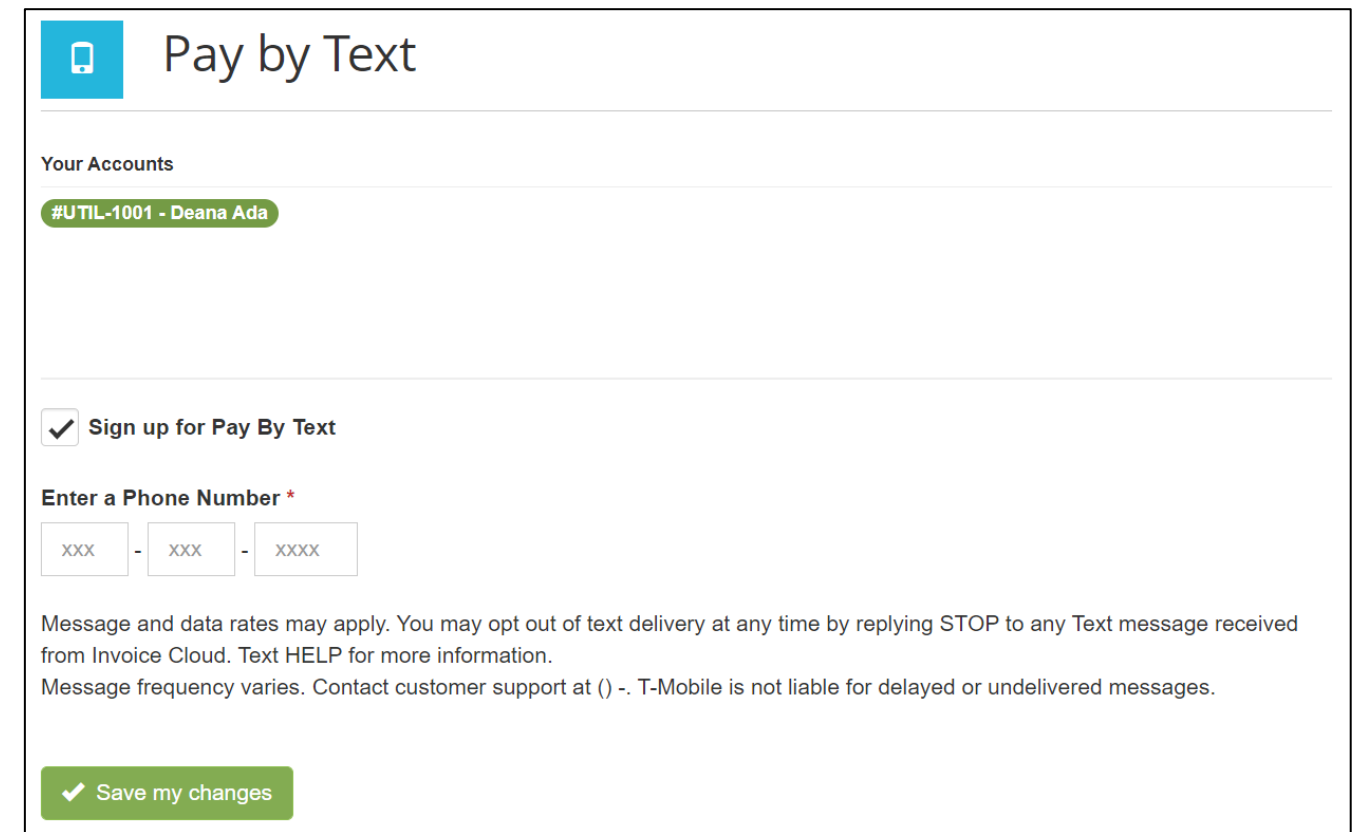
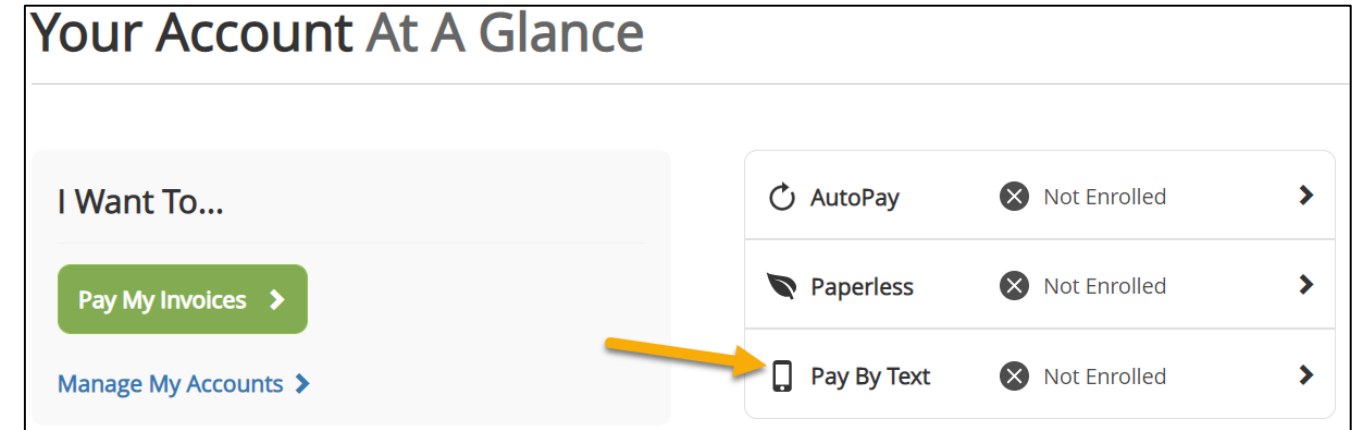
# AutoPay

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**.

The screenshot shows the 'Your Account At A Glance' page. On the left, under 'I Want To...', there are three options: 'Pay My Invoices' (a green button with a right arrow), 'Manage My Accounts' (a blue link with a right arrow), and 'Paperless' (highlighted with a yellow arrow). On the right, there are three rows of service status: 'AutoPay' (Not Enrolled), 'Paperless' (Not Enrolled), and 'Pay By Text' (Not Enrolled). Each row has a right arrow.

The screenshot shows the 'Paperless' settings page. At the top, there is a blue header with a leaf icon and the text 'Paperless'. Below the header, there is a paragraph: 'Going Paperless saves time and money by eliminating the need for paper printing and mailing of invoices and payments.' Below this is a table with the following data:

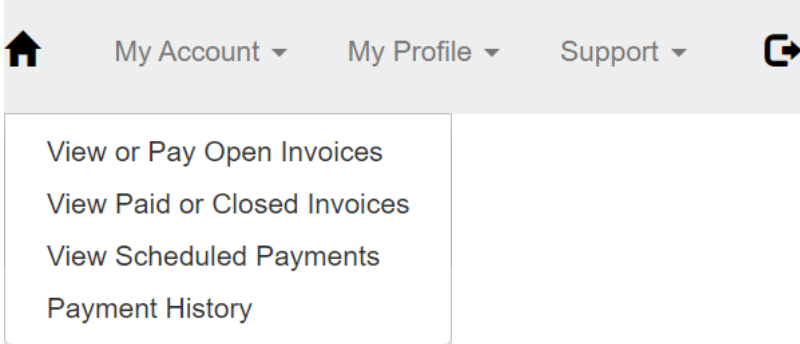
Account #	Type			Status
UTIL-1001	Utility Services	<input checked="" type="radio"/> Yes	<input type="radio"/> No	Not Paperless

Below the table, there is a checked checkbox followed by the text: 'By enabling Paperless, I agree to the [Invoice Cloud Payer Terms and Conditions](#).' At the bottom, there is a green button with a checkmark and the text 'Save my changes'.

# My Account

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

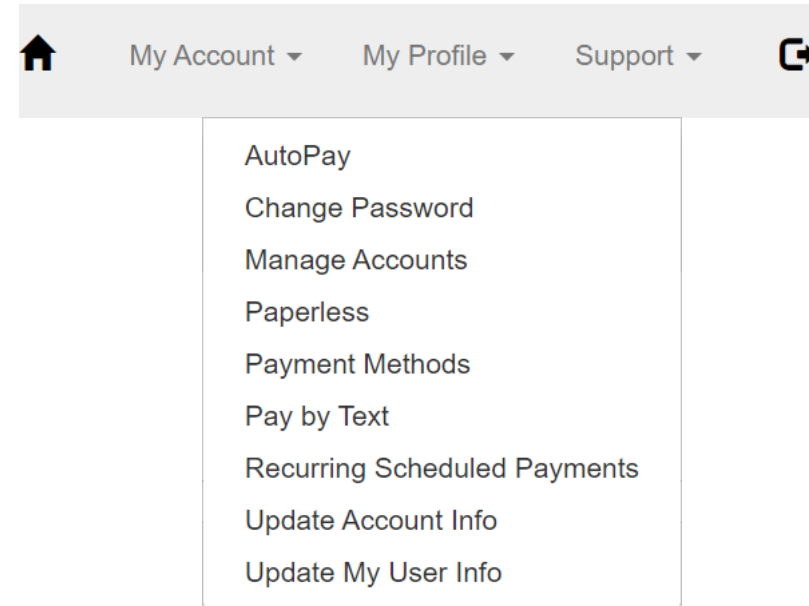
- View or Pay Open Invoices
- View Paid or Closed Invoices
- View Scheduled Payments
- View your Payment History.



# My Profile

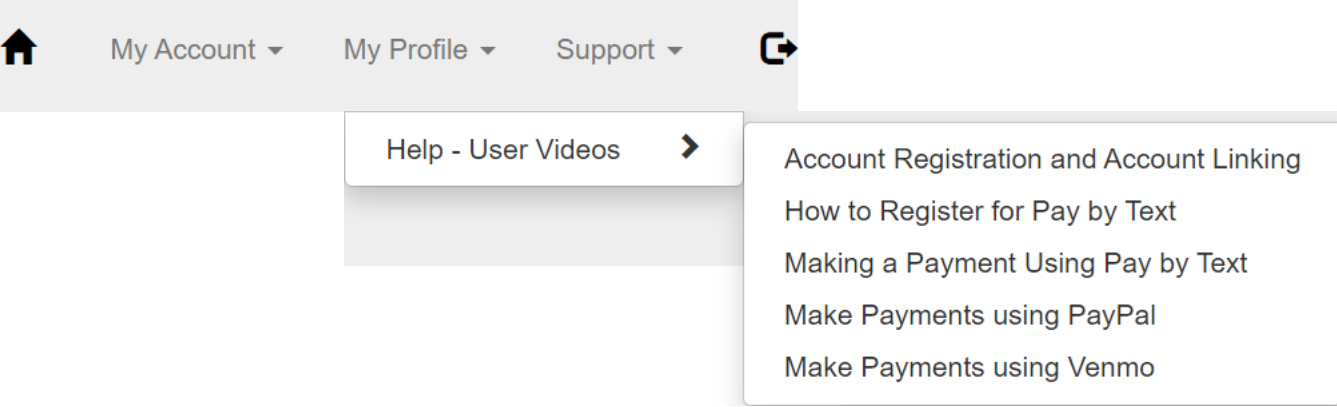
Use the **My Profile** menu at the top of the screen to:

- 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

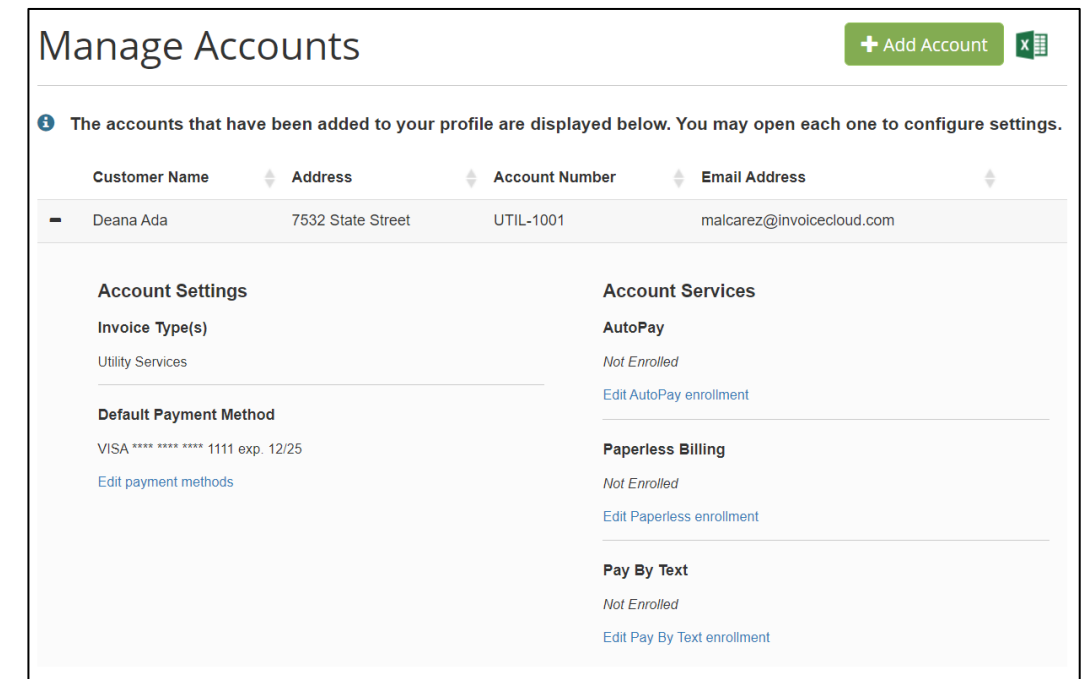
1. From the top menu, click **My Profile**.
2. Click **Manage Accounts**.

## 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. 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**.