



Customer Experience

Overview

This document describes all features of PayStar software. You can use this information to perform various tasks within the PayStar system and to gain an understanding of the software. Detailed below is a comprehensive overview of the functions available to you while using this software.

This is a guide showing you what it is like to use PayStar from the customer's perspective.

The functions available to paying customers include:

- Quickpay
- Customer Portal
 - Dashboard
 - Autopay Enrollment
 - Paperless Enrollment
 - Payment History
 - Bill History
 - Wallet
 - Notifications



QuickPay

This gives the customer the ability to look up their account using their account number to find their balance and make a payment, all with just a few clicks! The process for making a payment via QuickPay is detailed below.

Account Search

Enter your Account Number, then select "Look Up Account".

Let's find your account

View your account balance and make a payment

Welcome to our new payment portal!!

Account #

Look Up Account Already registered? [Login with email >](#)



Account Overview

This includes account number, balance, due date of the bill, as well as any additional fields of information made available by the biller.

To make a payment, select "Make a Payment".

<p>CONNIE BOWEN 0030037503</p> <p>AMOUNT DUE \$190.13</p> <p>Make a Payment</p> <p>Register for Autopay Register for Paperless Billing</p>	<p>Account Information</p> <p>Account #: 0030037503</p> <p>Name: CONNIE BOWEN</p> <p>Balance: \$190.13</p> <p>Due Date: 05/25/24</p> <p>Sync Date: 05/17/24 02:21 PM</p>
--	---

Enter Payment Amount

The customer is presented with the option to pay the full *Account Balance* or to *Pay a Different Amount*.

<p>Make a payment</p> <p>Account Payment Select the amount you'd like to pay</p> <p><input checked="" type="radio"/> Amount Due \$ 190.13</p> <p><input type="radio"/> Pay a Different Amount \$ 0.00</p> <p>Continue</p>	<p>Payment Summary</p> <p>Account details</p> <p>Name: CONNIE BOWEN</p> <p>Account #: 0030037503</p> <p>Balance: \$190.13</p> <p>Due Date: 05/25/24</p> <p>Sync Date: 05/17/24 02:21 PM</p>
--	---

Enter Payment Method

The *Payment Method Page* allows the customer to enter their credit/debit card or eCheck information to make the payment.

Make a payment

Payment Method

Payment Type

Credit / Debit
eCheck





Name on Card

Card Number

Expiration

CVV

Zip Code

Cancel Review

Payment Summary

edit

Account: 0030037503
CONNIE BOWEN

Account Payment **\$190.13**

Make a payment

Payment Method

Payment Type

Credit / Debit
eCheck

Personal

Checking
Savings

Business

Checking
Savings

Account Name

Routing Number

Account Number

Confirm Account Number

Zip Code

Cancel Review

Payment Summary

edit

Account: 0030037503
CONNIE BOWEN

Account Payment **\$190.13**


Review Payment

The *Review Payment* page is the last step in the process. This is where the customer can review their payment information and where they will agree to the service fee and terms of use by clicking "Submit Payment".

Make a payment

Progress indicator: ● — ● — ○

Confirm Payment

Payment Method:	 ****5454
Payment:	\$6.86
Service Fee: ?	\$3.15
Total:	\$10.01

By continuing, I agree to the [TERMS OF USE](#) and authorize Paystar to process this payment, along with the stated online service fee of \$3.15, which will also be charged to the credit/debit card.

[Cancel](#) [Submit Payment](#)




Confirmation

After the payment has been submitted, the customer will be brought to the *Confirmation Page*, where they will be presented with the status of their payment, Reference Number, breakdown of amounts paid, and Payment Date.

Your payment has been processed successfully

Reference #:	Q33QDR-7JJY
Payment Amount:	\$190.13
Service Fee:	\$3.15
Payment Date:	06/05/2024 12:35 pm



Would you like a receipt?

When payment is successful, the customer can email or print a copy of the receipt. The receipt shows the same information as the *Confirmation Page*.

Would you like a receipt?

Email Address

Print Receipt

Pay Faster Next Time

After a customer has submitted a payment, they are prompted to *Create Account*, which allows customers to create a logged in user within Paystar. Creating an account will give the customer access to additional features available through their biller.

Want to pay faster next time?

Customer Portal

Create Account

When a customer selects the *Create Account*, they will be asked to enter their first name, last name and email address. They will need to agree to the *Terms of Use* and select *Create Account*. Once completed, the customer will receive an email to *Finish Account Registration*. This will prompt the customer to create a password.

Customer Information

First Name

Last Name

Email Address

By continuing, I agree to the Paystar [TERMS OF USE](#).

Cancel

Dashboard

The customer dashboard provides an overview of the customer's account(s) and how they access additional information and features available to them through their biller.

My Accounts Wallet Profile [+ Link Account](#)

Enrolled in Autopay by Albert Farley

ALBERT FARLEY
0020074001

AMOUNT DUE
\$0.00

Recent payment: 05/31/24

[Make a Payment](#)

[Manage Autopay >](#) [Manage Paperless >](#)

[View Bill](#)

Account Information ...

Account #: 0020074001

Name: ALBERT FARLEY

Balance: -\$30.00

Due Date: 05/25/24

Sync Date: 05/17/24 02:21 PM

Payment History Bill History

Search

	Date	Amount	Reference #	Payment Method	Status
Sale	05/31/24 11:04 AM	\$15.00	Q2ND67-7JGZ	Unknown ending in 6611	✓

Link Accounts

If a customer owns multiple properties, they may select the "Link Account" option in the top right corner of the tab. This allows them to use their customer portal for multiple accounts via one email address.

Link Account ✕

Enter your account information below to locate the account.

Account #

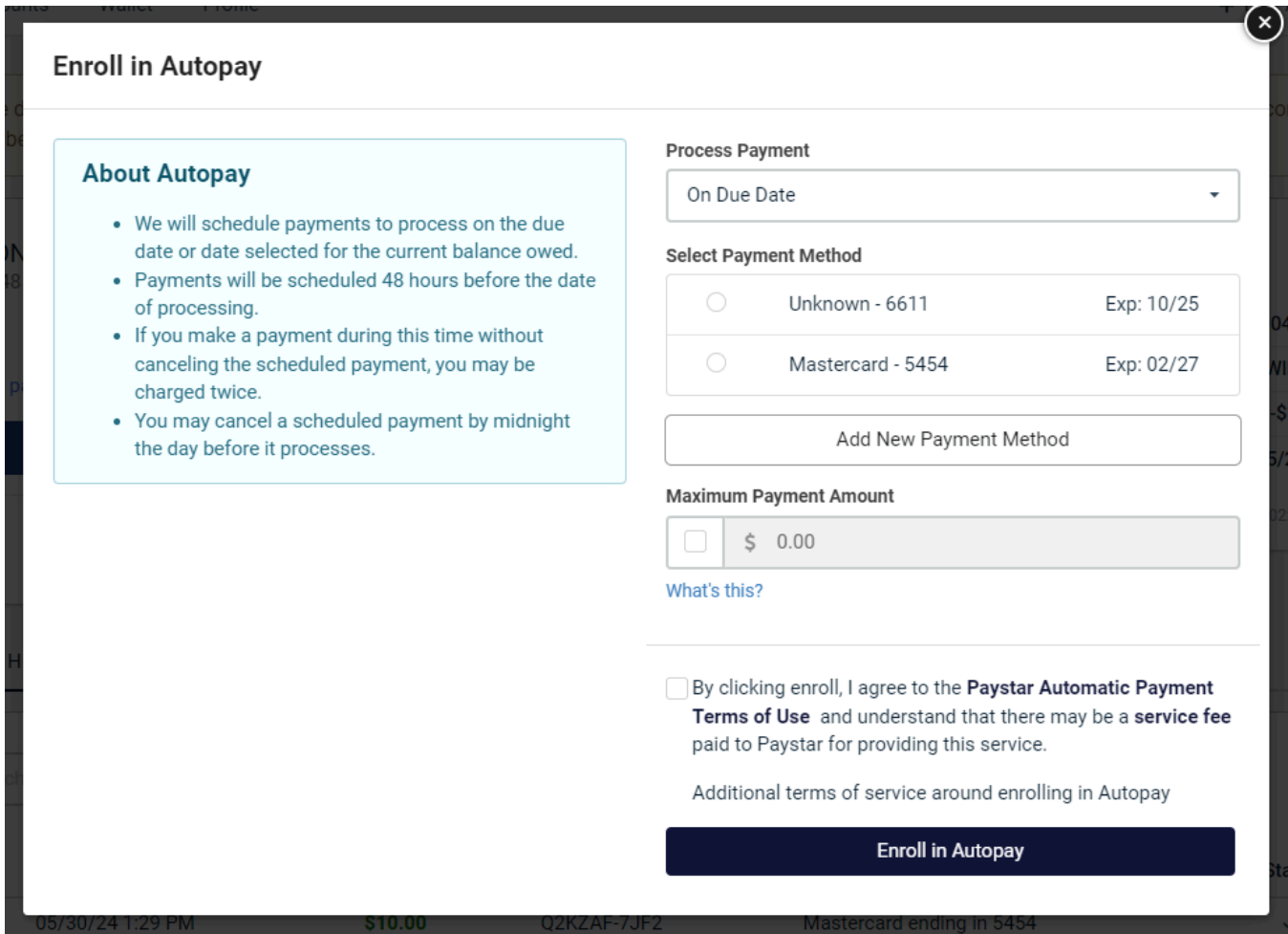
[Search](#)

Manage Autopay

The Manage Autopay Option allows a customer to enroll in Autopay (recurring monthly payments) via the customer portal. Customers can manage their settings and make updates to their preferences at any time.

Enroll in AutoPay

On the Dashboard, the customer will see *Manage AutoPay* under the *Amount Due*. To enroll, the customer will click *Manage Autopay*. If the customer does not have a Payment Source saved to their wallet, the modal will ask them to add a Payment Method before enrolling. The enrollment modal will ask the customer to choose a payment processing date, a payment method, and a maximum payment amount.



Enroll in Autopay

About Autopay

- We will schedule payments to process on the due date or date selected for the current balance owed.
- Payments will be scheduled 48 hours before the date of processing.
- If you make a payment during this time without canceling the scheduled payment, you may be charged twice.
- You may cancel a scheduled payment by midnight the day before it processes.

Process Payment

On Due Date

Select Payment Method

<input type="radio"/>	Unknown - 6611	Exp: 10/25
<input type="radio"/>	Mastercard - 5454	Exp: 02/27

Add New Payment Method

Maximum Payment Amount

\$ 0.00

[What's this?](#)

By clicking enroll, I agree to the **Paystar Automatic Payment Terms of Use** and understand that there may be a **service fee** paid to Paystar for providing this service.

Additional terms of service around enrolling in Autopay

Enroll in Autopay

05/30/24 1:29 PM \$10.00 Q2KZAF-7JF2 Mastercard ending in 5454



Process Payment

The customer can choose to process their AutoPay payment up to 5 days before the due date. They can choose multiple options for processing payment date:

- On Due Date
- 1 Day Before Due Date
- 2 Days Before Due Date
- 3 Days Before Due Date
- 4 Days Before Due Date
- 5 Days Before Due Date

Select Payment Method

If the customer has a payment method saved in their wallet, it will appear under *Select Payment Method*. They can choose to use a saved payment method or they may add a new one. The chosen method will be the one used to process automatic payments.

NOTE: A customer cannot remove a payment method from their wallet if it is being used for AutoPay. They must update their AutoPay payment method to a different payment method before removing the one that is currently in use.

Maximum Payment Method

A customer can set a maximum amount that can be charged to their payment method. If the balance due is above the maximum amount set, the payment method will not be charged at all. The customer will need to pay their bill or amount owed by other means.

Terms of Use

To enroll in AutoPay a customer must review the *Paystar Automatic Payment Terms of Use*. Once the checkbox is clicked, they will be able to click "Enroll".

Autopay Updates

If the Account was enrolled in Autopay via the Customer Portal by the Customer, Customers can manage their AutoPay settings from the Customer Portal Dashboard by clicking *Manage Autopay* on the Account Details. Customers can change their payment processing date, payment method, and maximum payment amount. To save updated Autopay settings, the customer must re-review the *Paystar Automatic Payment Terms of Use*. Once the checkbox is clicked, they will be able to click "Update Settings".

If the Account was enrolled in AutoPay by the Organization via the Back Office Portal the customer will need to contact the organization to manage the Customer's autopay elections. The organization can also unenroll the customer in Back Office Autopay so that the customer can manage their elections moving forward.



Customers can unenroll from AutoPay from the Customer Portal Dashboard by clicking “Manage Autopay”. A pop-up will appear that is similar to the Enroll modal. At the bottom-left of the AutoPay modal, there will be *Unenroll from AutoPay* in red text.

NOTE: Any payments already scheduled to be processed must be canceled manually. Unenrolling will not cancel previously scheduled payments.

Cancel a Scheduled Payment

An automatic payment is scheduled *to be processed* two days before the processing date. Once scheduled, the customer has until midnight the day before processing to cancel the scheduled payment.

Autopay Notifications

Customers who are enrolled in AutoPay will receive email notifications regarding their AutoPay settings and payments.

AutoPay Enrolled - You have enrolled in AutoPay.

Upcoming AutoPay Payment - Your payment has been scheduled.

AutoPay Scheduling Issue - Your payment has not been scheduled.

AutoPay Updated - Your AutoPay settings have been updated.

AutoPay Payment Canceled - Your scheduled payment has been canceled.

AutoPay Canceled - You have unenrolled from AutoPay.

Manage Paperless

The *Manage Paperless* option allows for the customer to enroll in paperless billing. By enrolling in this feature, customers are opting to no longer receive a physical bill in the mail. The customer also has the ability to unenroll from this feature at any time.

Manage Paperless Billing

About Paperless Billing

- Enrolling in Paperless Billing will remove you from your Organization's mailing list. By doing so, you will no longer receive a physical bill in the mail.
- Enrolling does not affect Due Dates, Late Fees, Balances, etc.

Email Address

test@gmail.com

I understand that by enrolling in Paperless Billing I will no longer receive a physical copy of my bill in the mail.

Update Settings

Unenroll from Paperless Billing


Wallet

The *Wallet* function allows the customer to save payment methods for convenience by automatically inputting the information instead of manually for every payment. It is also possible to store multiple payment methods. To edit, simply delete and add a new payment method.

My Accounts **Wallet** Profile [+ Link Account](#)

Manage Wallet

Saved Payment Sources

- Credit Card** Autopay ⓘ
60XXXXXXXXXX6611
Albert Farley 10 / 25
- Credit Card** Autopay ⓘ 
54XXXXXXXXXX5454
Diane Deslatte 02 / 27


Add Payment Method

Payment Type

Credit / Debit eCheck

Name on Card

Card Number

Expiration

Zip Code

[Cancel](#) [Save Payment Source](#)



Notifications

Upcoming Payment Notifications give the customers the ability to receive email and text reminders when a payment is getting close to the due date. Customers have the ability to select to receive these emails and texts up to five (5) days before or on the due date.

New Bill Notifications give the customers the ability to receive email and text notifications when a new bill is available online. Notifications go out at 6:00 PM the day bills are added to the Customer's Account.

Notifications

	Email	SMS	
<input type="checkbox"/> ? Upcoming Payment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Days Before ▾
<input type="checkbox"/> ? New Bill	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

I agree to the [Messaging Terms of Service](#)

[Update Preferences](#)