

Payment Portal Reference Guide

Otis Payment Portal



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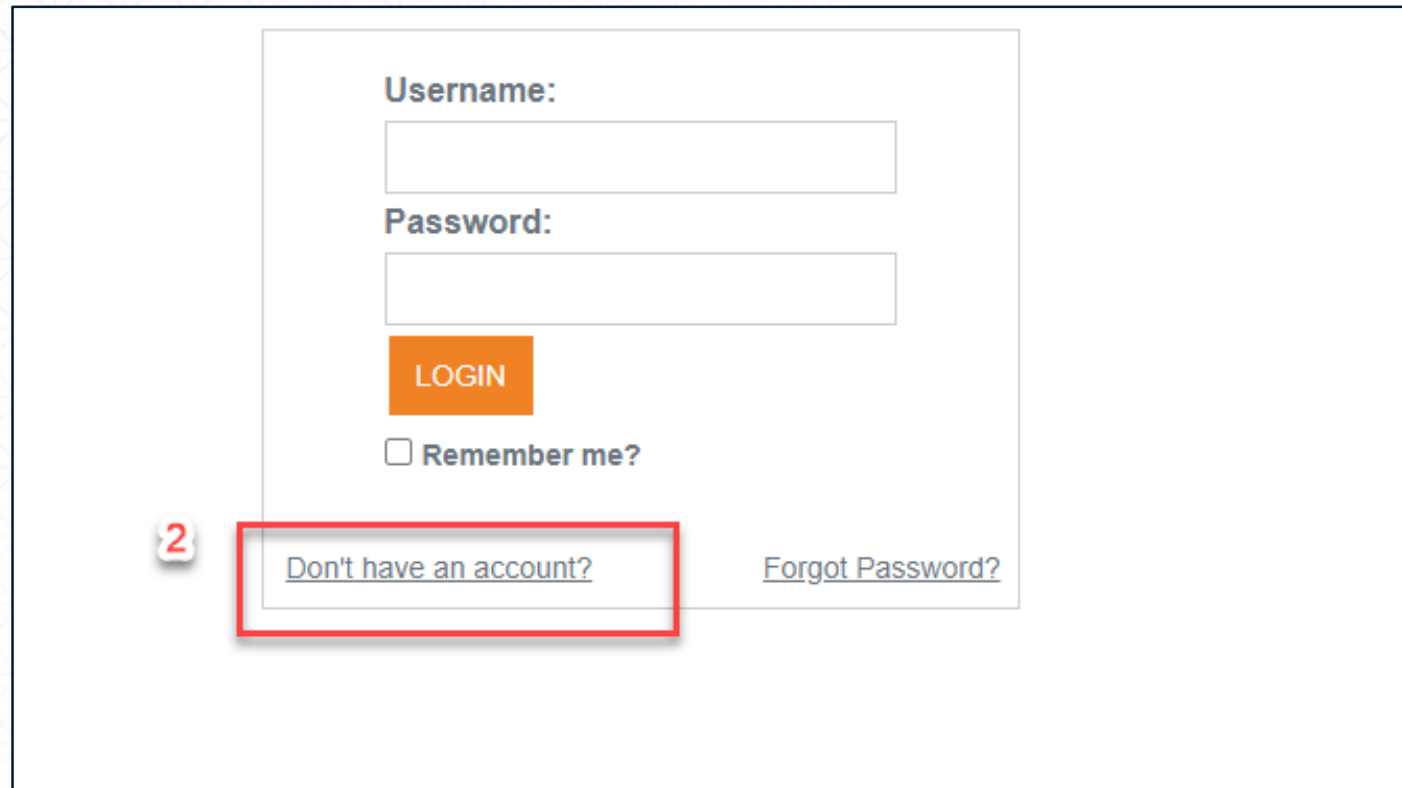
Creating an Account



Creating an Account

Step 1: Click on Link to get to payment portal Login Screen- <https://otis.payinvoicedirect.com/>

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



The screenshot shows a login form with the following elements:

- Username:** A text input field.
- Password:** A text input field.
- LOGIN**: An orange button.
- ☐ **Remember me?**: A checkbox with the label "Remember me?".
- Don't have an account?**: A link highlighted with a red box and a red number 2.
- 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.

OTIS
5500 Village Blvd, Suite 102 West Palm Beach FL 33407

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

C

CUSTOMER NO.:
DATE:
INVOICE NO.:
TOTAL SERVICE CONTRACT AMOUNT:

A

12345678
6/15/2020

B

100400000005
\$ 194.98

MAKE CHECK PAYABLE TO:

Otis Elevator Company
PO Box 13716
Newark NJ 07188-0716

100400012736 0000019498 5

Fill in all fields and click Continue

HOME | **REGISTRATION**

Registration

PROVIDE YOUR REGISTRATION INFORMATION

Customer Account Number*
12345678

Invoice Number*
1004000005

Zip Code*
12345

First Name*
Joe

Last Name*
Otis

Email Address*
Joe.Otis@Otis.com

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




Otis Elevator Company. 2020



Signature
Service™

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.



759684

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

LOG OUT

ACCOUNT

View Open Invoices

Exact Search

Date Range

Invoice Number Range

Invoice Number:

Invoice Date:

Document Type:

From Date:

To Date:

Invoice Number From:

Invoice Number To:

FIND INVOICES

Total of All Open Invoices: \$110,606

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount	<input type="checkbox"/>	Amount	
100400066085	Maintenance Invoice	5/23/2020	16	5/23/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
100400036477	Maintenance Invoice	4/28/2020	41	4/28/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
100400014200	Maintenance Invoice	3/23/2020	77	3/23/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
CYS20419 001	Open Order Invoice	2/25/2020	104	2/25/2020	\$45,413.88	\$45,413.88	<input type="checkbox"/>		Print
CYS20472 001	Open Order Invoice	2/25/2020	104	2/25/2020	\$19,028.75	\$19,028.75	<input type="checkbox"/>		Print
CYS05595 320	Maintenance Invoice	2/20/2020	109	2/20/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
CYS20349 001	Open Order Invoice	1/28/2020	132	1/28/2020	\$2,096.00	\$2,096.00	<input type="checkbox"/>		Print
CYS05595 220	Maintenance Invoice	1/20/2020	140	1/20/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
101000536163	Credit Memo	8/27/2019	286	8/27/2019	-\$182.44	-\$182.44	<input type="checkbox"/>		Print

<<


<


>

>>

Total record found: 9. Displaying record 1 to 9.

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.)



758884
CHANGE CUSTOMER NUMBER
UPDATE BILLING PREFERENCES


ACCOUNT

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:

FIND INVOICES

Total of All Open Invoices: \$118,606.19

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount		Amount	
100400066085	Maintenance Invoice	5/23/2020	16	5/23/2020	\$8,850.00	\$8,850.00	<input checked="" type="checkbox"/>	8850.00	Print
100400036477	Maintenance Invoice	4/28/2020	41	4/28/2020	\$8,850.00	\$8,850.00	<input checked="" type="checkbox"/>	4850.00	Print
100400014206	Maintenance Invoice	3/23/2020	77	3/23/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
CYS20419 001	Open Order Invoice	2/25/2020	104	2/25/2020	\$45,413.88	\$45,413.88	<input type="checkbox"/>		Print
CYS20472 001	Open Order Invoice	2/25/2020	104	2/25/2020	\$19,028.75	\$19,028.75	<input type="checkbox"/>		Print
CYS05595 330	Maintenance Invoice	2/20/2020	109	2/20/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
CYS20349 001	Open Order Invoice	1/28/2020	132	1/28/2020	\$2,096.00	\$2,096.00	<input type="checkbox"/>		Print
CYS05585 228	Maintenance Invoice	1/20/2020	140	1/20/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
101000536163	Credit Memo	8/27/2019	286	8/27/2019	\$182.44	\$182.44	<input type="checkbox"/>		Print

Total record found: 9
Displaying record 1 to 5

PROCEED TO PAYMENT

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

Invoices

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 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

OTIS

Otis Elevator Company. 2020

 Signature Service™

10

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


The screenshot shows the Signature Service web portal. At the top, there is a header with the Signature Service logo, a customer number dropdown (49275108), and buttons for 'CHANGE CUSTOMER NUMBER' and 'UPDATE BILLING PREFERENCES'. Below the header, there is a navigation bar with 'ACCOUNT' highlighted. A dropdown menu is open under 'ACCOUNT', 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'. On the left side of the page, there are sections for 'View Open Invoices', '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). At the bottom right, there is a 'FIND INVOICES' button.

Adding additional customer numbers to your profile



Adding additional customer numbers to your profile

Hover over account and select add new customer number.



723946

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

ACCOUNT

View Open Invoices

Exact Search

Invoice Number:

Invoice Date:

Document Type:

-All Types-

OPEN INVOICE & PAYMENT

PAID INVOICES/RECEIPTS

MANAGE PAYMENT PROFILES

ADD NEW CUSTOMER NUMBER

CHANGE PASSWORD

CONTACT FORM

Date Range

From Date:


To Date:

Invoice Number Range

Invoice Number From:

Invoice Number To:

FIND INVOICES



723946

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

ACCOUNT

PROVIDE YOUR REGISTRATION INFORMATION

Customer Account Number*

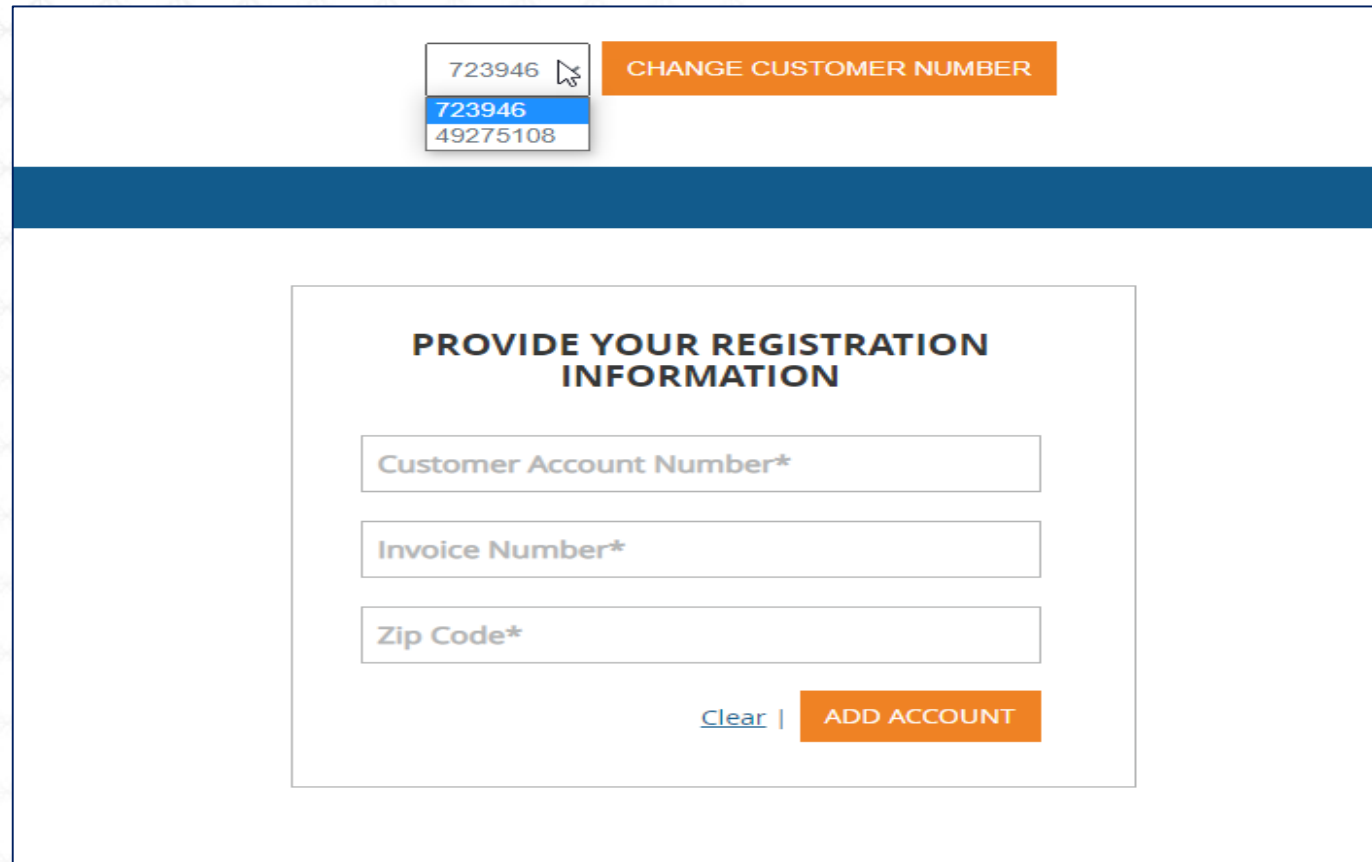
Invoice Number*

Zip Code*

Clear

ADD ACCOUNT

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.



The screenshot displays a web interface for account management. At the top, there is a dropdown menu showing three customer numbers: 723946 (selected), 723946, and 49275108. To the right of the dropdown is an orange button labeled "CHANGE CUSTOMER NUMBER". Below this is a dark blue horizontal bar. Underneath the bar is a white box with the heading "PROVIDE YOUR REGISTRATION INFORMATION". Inside this box are three input fields: "Customer Account Number*", "Invoice Number*", and "Zip Code*". At the bottom right of the box are a "Clear" link and an orange "ADD ACCOUNT" button.

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.



4927510E

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

LOG OUT

ACCOUNT

ew 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:

FIND INVOICES


Total of All Open Invoices: \$63,097.38

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount	<input checked="" type="checkbox"/>	Amount	
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

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

PROCEED TO PAYMENT

That 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 contact NSAA.collections@otis.com. Below is an example of the Reference article you will see.



Signature
Service

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

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

REFERENCE ARTICLE

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

*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.

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, select Autopay Accounts from the Account Dropdown.

The screenshot shows the Otis Signature Service web portal. At the top, there is a header with the Otis logo and 'Signature Service' text. Below the header, there is a navigation bar with a dropdown menu labeled 'ACCOUNT'. The dropdown menu is open, showing several options: 'OPEN INVOICE & PAYMENT', 'PAID INVOICES/RECEIPTS', 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER', 'CHANGE PASSWORD', 'CONTACT FORM', and 'AUTOPAY ACCOUNTS'. The 'AUTOPAY ACCOUNTS' option is highlighted with a red box. To the right of the dropdown menu, there are search filters for 'Date Range' (From Date, To Date) and 'Invoice Number Range' (Invoice Number From, Invoice Number To). Below these filters is a 'FIND INVOICES' button. At the bottom of the page, there is a table of open invoices with columns for Invoice Number, Document Type, Date, Days Past Due, Due Date, Total Amount, Open Amount, and a checkbox for each row. The table shows several maintenance invoices and one open order invoice.

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount		Amount	
100400000729	Maintenance Invoice	6/15/2020	77	6/15/2020	\$3,007.98	\$3,007.98	<input type="checkbox"/>		Print
100400003516	Maintenance Invoice	6/15/2020	77	6/15/2020	\$1,503.99	\$1,503.99	<input type="checkbox"/>		Print
100400003517	Maintenance Invoice	6/15/2020	77	6/15/2020	\$752.01	\$752.01	<input type="checkbox"/>		Print
100400003519	Maintenance Invoice	6/15/2020	77	6/15/2020	\$2,255.97	\$2,255.97	<input type="checkbox"/>		Print
101000526320	Maintenance Invoice	6/6/2019	452	6/6/2019	\$21.38	\$21.38	<input type="checkbox"/>		Print
101000526321	Maintenance Invoice	6/6/2019	452	6/6/2019	\$21.38	\$21.38	<input type="checkbox"/>		Print
CA 15611 001	Open Order Invoice	2/25/2019	553	2/25/2019	\$11,110.13	\$851.78	<input type="checkbox"/>		Print

You will then see the next screen and 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
EC ending in 5236	31		98467477	DELETE

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

ADD NEW AUTOPAY ACCOUNT

Select the day of the month that you want to have your payment withdrawn or charged to your credit card:

Signature
Service

ACCOUNT

Payment Profile	
Visa ending in 6785	27
Visa ending in 6785	27
Ending in 5236	31

<< > >>

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

+

ADD NEW AUTOPAY ACCOUNT

Auto Payment - EASYCommerce

Auto Payment Frequency: Monthly

Payment On:

1

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

Payment Profile:

ending in 4113

Pay All Open Invoices:

False

Contract:

ADD AUT

ACCOUNT

Select the payment method that you want to use for the recurring payments:

Signature
Service

ACCOUNT

Payment Profile	
Visa ending in 6785	27
Visa ending in 6785	27
Visa ending in 5236	31

<>>>

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

ADD NEW AUTOPAY ACCOUNT

Auto Payment - EASYCommerce

Auto Payment Frequency: Monthly

Payment On: 31

Payment Profile: Visa ending in 4115

Pay All Open Invoices: ☐ True ☒ False

Contract: 10349

ADD AUTOPAY ACCOUNT

Customer Number

DELETE

DELETE

DELETE

Select the contract that you want to use for the recurring payments.

*In order to set up Autopay, there must be a new (within the last 30 days) invoice open on your account. If there is not, you will not see a contract available to select.

Auto Payment - EASYCommerce

Auto Payment Frequency: Monthly

Payment On: 1

Payment Profile: Visa ending in 4115

Pay All Open Invoices: ☐ True ☒ False

Contract:

10349

10349

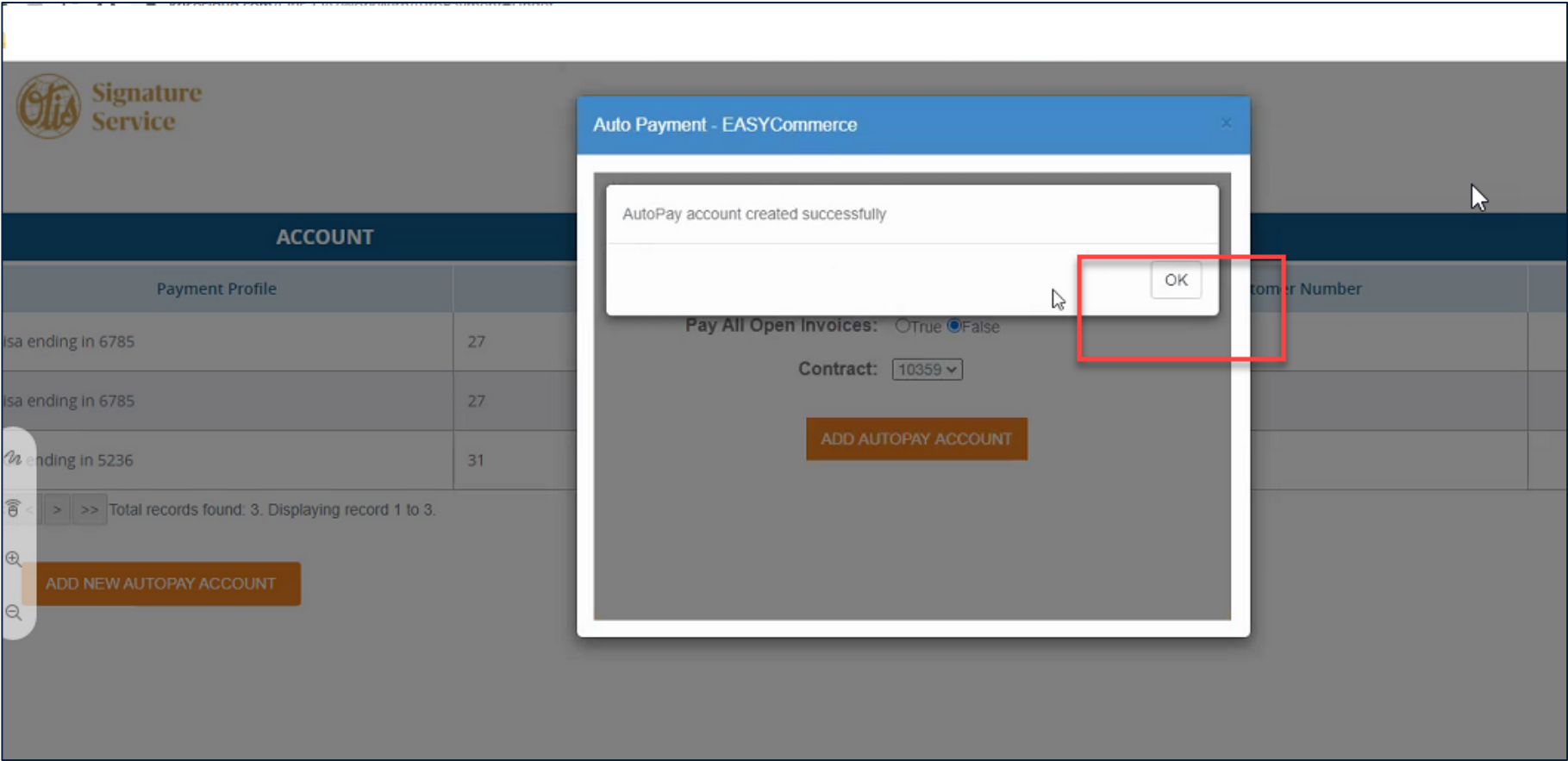
10359

10373

10390

ADD AUTO COUNT

You will see a message that the Autopay account has been created separately.



Updating Billing Preferences



Click on the orange button or from the drop down menu

Signature Service

275917

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

LOG OUT

ACCOUNT

View Open Invoices

Exact Search

Invoice Number:

Invoice Date:

Document Type:

OPEN INVOICE & PAYMENT

PAID INVOICES/RECEIPTS

MANAGE PAYMENT PROFILES

ADD NEW CUSTOMER NUMBER

CHANGE PASSWORD

CONTACT FORM

AUTOPAY ACCOUNTS

Date Range

From Date:

To Date:

Invoice Number Range

Invoice Number From:

Invoice Number To:

FIND INVOICES

Total of All Open Invoices:

\$8,414.49

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount		Amount	
100400000729	Maintenance Invoice	6/15/2020	77	6/15/2020	\$3,007.98	\$3,007.98	<input type="checkbox"/>	<input type="text"/>	Print
100400003516	Maintenance Invoice	6/15/2020	77	6/15/2020	\$1,503.99	\$1,503.99	<input type="checkbox"/>	<input type="text"/>	Print
100400003517	Maintenance Invoice	6/15/2020	77	6/15/2020	\$752.01	\$752.01	<input type="checkbox"/>	<input type="text"/>	Print
100400003519	Maintenance Invoice	6/15/2020	77	6/15/2020	\$2,255.97	\$2,255.97	<input type="checkbox"/>	<input type="text"/>	Print
101000526320	Maintenance Invoice	6/6/2019	452	6/6/2019	\$21.38	\$21.38	<input type="checkbox"/>	<input type="text"/>	Print
101000526321	Maintenance Invoice	6/6/2019	452	6/6/2019	\$21.38	\$21.38	<input type="checkbox"/>	<input type="text"/>	Print
CA 15611 001	Open Order Invoice	2/25/2019	553	2/25/2019	\$11,110.13	\$851.78	<input type="checkbox"/>	<input type="text"/>	Print

From there you can switch to paperless invoicing, change billing address and/or update the email address that your certificate is sent upon renewal. (Please allow 1 week for changes to take effect)

First name *

Last name *

Email *

Company name *

Customer Number *

What changes would you like to make?

☐ Receive email communication from Otis on product information and offers/discounts

☐ Switch to paperless

☐ Billing Address Change

☐ Paperless Certificate of Insurance

Submit

A dark blue background featuring a faint, semi-transparent image of two people in a meeting. On the left, a person with glasses is looking down at a laptop. On the right, another person is looking towards the first person. The overall tone is professional and collaborative.

OTIS