

# Electronic Payments

# Paiements électroniques

## User Guide

## Guide de l'utilisateur

---

Payment Portal  
Portail de paiements



# Table of Contents

# Table des matières

- ◆ [How to Create an Account/Register for electronic payments.](#)  
[Comment créer un compte/s'enregistrer pour les paiements électroniques](#)
- ◆ [How to Make a Payment](#)  
[Comment effectuer un paiement](#)
- ◆ [How to Add Additional Customer Numbers to your Profile](#)  
[Comment ajouter des numéros de client à votre profil](#)
- ◆ [How to Download a Copy of your Invoice](#)  
[Comment télécharger une copie de votre facture](#)
- ◆ [How to sign up for Automatic Recurring Payments \(ACH and Credit Cards\)](#)  
[Comment s'inscrire au prélèvement automatique \(traitement automatique des chèques et cartes de crédit\)](#)



# Creating an Account

## Créer un compte

---





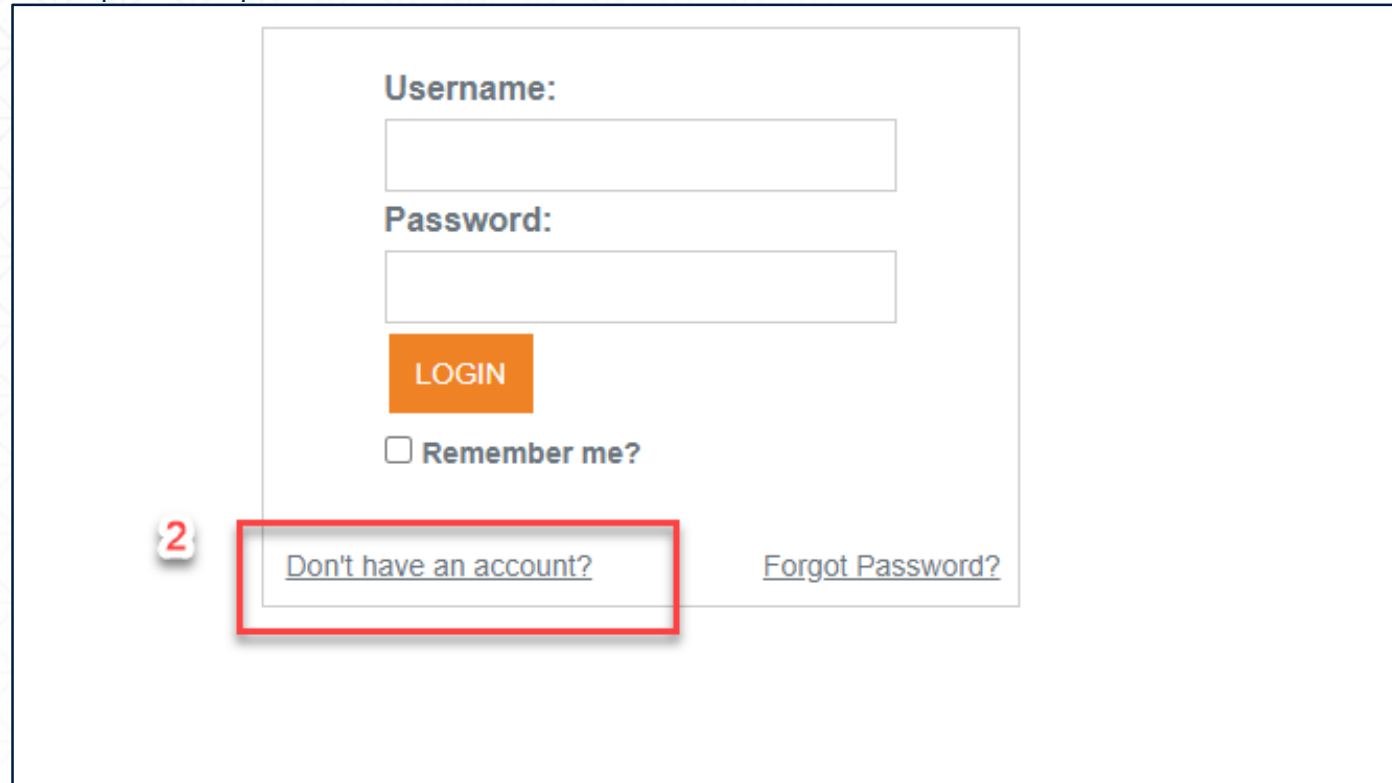
# Creating an Account – Créer un compte

**Step 1:** Click on Link to get to Login Screen- <https://www.payinvoicedirect.com/>

**1re étape :** Cliquez sur le lien menant à l'écran de connexion KRISE - <https://www.payinvoicedirect.com/>

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

**2e étape :** Pour créer un compte, cliquez sur **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?**
- Don't have an account?**: A link highlighted with a red box and a red '2' in a white circle.
- Forgot Password?**: A link.

**Step 3:** Fill in all information in the form below (You will need to have an invoice to reference for the Customer Account Number, Invoice Number, and Zip Code)

**3e étape :** Remplissez le formulaire ci-dessous (consultez une facture pour obtenir votre numéro de compte client, numéro de facture et code postal.

HOME | REGISTRATION

## Registration

PROVIDE YOUR REGISTRATION INFORMATION

See below screenshot of invoice for where to find these fields

Customer Account Number\* **A**

Invoice Number\* **B**

Zip Code\* **C**

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](#)

**\*\*Your password must be at least 6 digits and contain at least one number. Special characters are not allowed\*\***

**\*\*Votre mot de passe doit contenir au moins 6 caractères et un chiffre. Les caractères spéciaux ne sont pas acceptés\*\***

Sample of Invoice and where to find Customer Number, Invoice Number, and Zip Code.  
Exemple de facture comportant (A) le numéro de client, (B) le numéro de facture et (C) le code postal.

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.:**

A

12345678

**DATE:**

6/15/2020

**INVOICE NO.:**

B

100400000005

**TOTAL SERVICE CONTRACT AMOUNT:**

\$ 194.98

**MAKE CHECK PAYABLE TO:**

Otis Elevator Company  
PO Box 13716  
Newark NJ 07188-0716

100400012736 0000019498 5

# OTIS

Otis Elevator Company. 2020



Signature  
Service™

Fill in all fields and click Continue  
Remplissez tous les champs et cliquez sur **CONTINUE.**

HOME | REGISTRATION

## Registration

### PROVIDE YOUR REGISTRATION INFORMATION

-Customer Account Number\*  
12345678

-Invoice Number\*  
10040000005

-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.  
Ceci vous mènera à l'écran des factures impayées de votre compte.



# Making a Payment

## Effectuer un paiement

---





# Making a Payment – Effectuer un paiement

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.

Pour effectuer un paiement, cliquez sur la case correspondant à la facture que vous désirez payer et le montant impayé s'affichera par défaut dans le champ **Amount**.

The screenshot displays the 'ACCOUNT' section of the Otis Signature Service portal. At the top, there is a search bar with the customer number '759684' and a 'CHANGE CUSTOMER NUMBER' button. Below this is a 'View Open Invoices' section with search filters for 'Exact Search' (Invoice Number, Invoice Date, Document Type), 'Date Range' (From Date, To Date), and 'Invoice Number Range' (Invoice Number From, Invoice Number To). A 'FIND INVOICES' button is located below the filters. The total of all open invoices is \$110,600. The main table lists the following invoices:

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

Navigation: << < > >> 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.)

Une fois les factures sélectionnées, cliquez sur **PROCEED TO PAYMENT** dans le coin inférieur droit. Veuillez noter que si vous modifiez le montant affiché dans le champ **Amount**, vous serez tenu de préciser la raison pour laquelle vous ne payez pas le montant total.

The screenshot displays the 'ACCOUNT' section of the Otis Signature Service portal. At the top, there is a customer number '758884' and a 'CHANGE CUSTOMER NUMBER' button. Below this is a 'View Open Invoices' section with search filters for 'Exact Search' (Invoice Number, Invoice Date, Document Type), 'Date Range' (From Date, To Date), and 'Invoice Number Range' (Invoice Number From, Invoice Number To). A 'FIND INVOICES' button is centered below the filters. On the right, it states 'Total of All Open Invoices: \$116,906.19'. The main area contains a table of invoices with columns for Invoice Number, Document Type, Date, Days Past Due, Due Date, Total Amount, Open Amount, a checkbox for selection, and an 'Amount' field for payment. The bottom right corner features a 'PROCEED TO PAYMENT' button.

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 checked="" type="checkbox"/>	8850.00	Print
100400036477	Maintenance Invoice	4/26/2020	41	4/26/2020	\$8,850.00	\$8,850.00	<input checked="" type="checkbox"/>	4850.00	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
CYS0595 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
CYS0595 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

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, there is no limit on the amount accepted by e-check).

Dans cet écran, vous devez soit sélectionner le mode de paiement précédemment sauvegardé ou ajouter un nouveau mode de paiement. Il vous est également possible de répartir le montant sur les modes de paiement sauvegardés à votre compte (limite de 49 999,00 \$ pour les paiements par carte de crédit, aucune limite pour les paiements par eCheck).

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 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
<b>Remaining Balance :</b>	49,000.00
	BSD

Use this payment method

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

Une fois le paiement effectué, vous recevrez un courriel contenant les renseignements suivants :

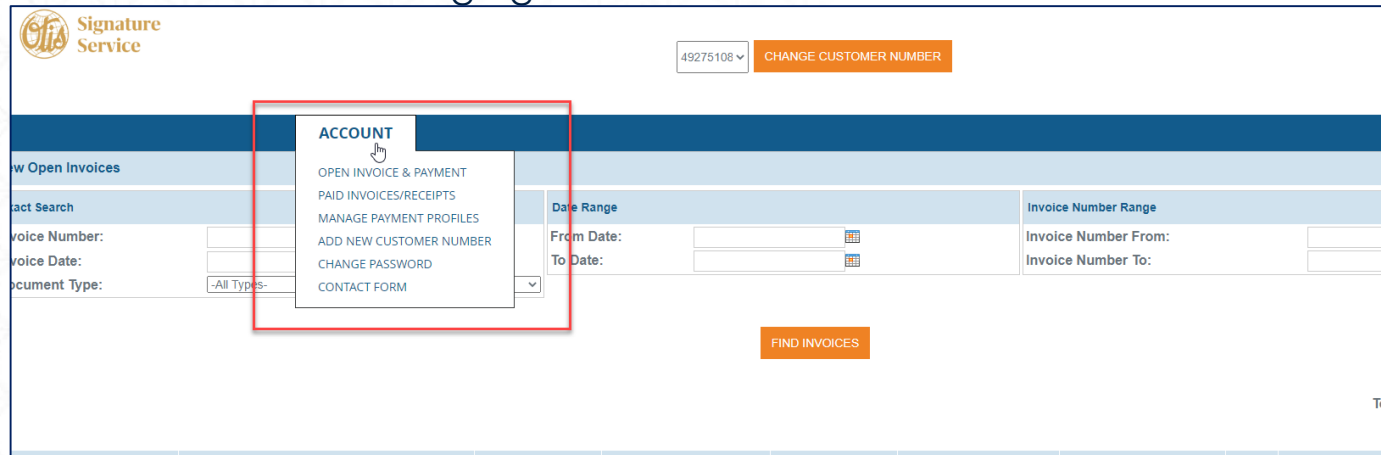
Paid Invoices										
Invoice #	Pay Item	Type	Company	Amount Applied	Discount Taken	Paid Amount	Remaining Amount	Status	Payment Id	Batch Number
110400093819	001	Maintenance Invoice	00110	100.00	0.00	100.00	2,348.12	Complete		

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	<a href="mailto:sean.qa@test.com">sean.qa@test.com</a>

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.

Passez le curseur sur ACCOUNT pour afficher le menu vous permettant de consulter les reçus de vos paiements antérieurs, gérer vos profils de paiement et modifier vos réglages.





**Adding additional  
customer numbers  
to your profile**  
**Ajouter des  
numéros de client  
à votre profil**

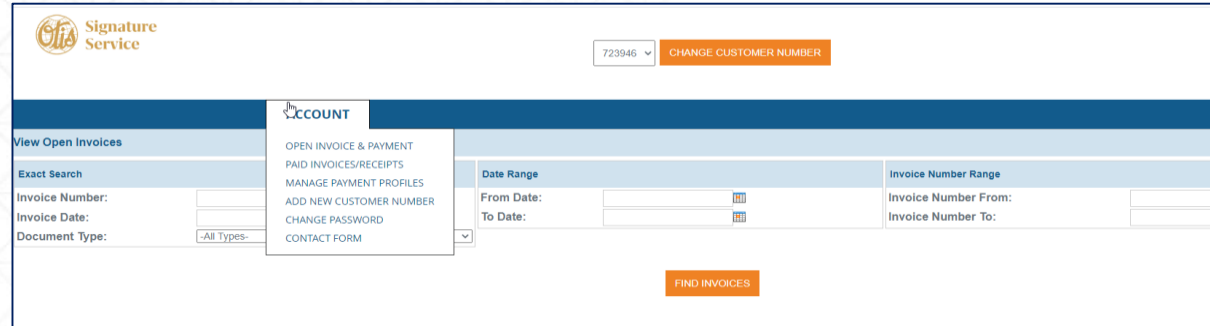


# Adding additional customer numbers to your profile

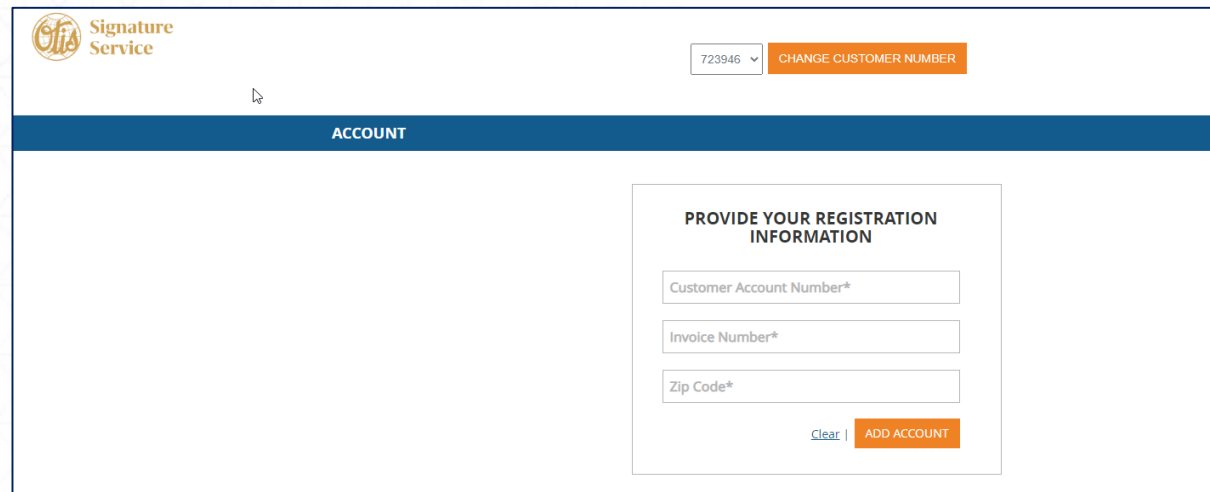
## Ajouter des numéros de client à votre profil

Hover over account and select add new customer number.

Passez le curseur sur **ACCOUNT** et sélectionnez **ADD NEW CUSTOMER NUMBER**.



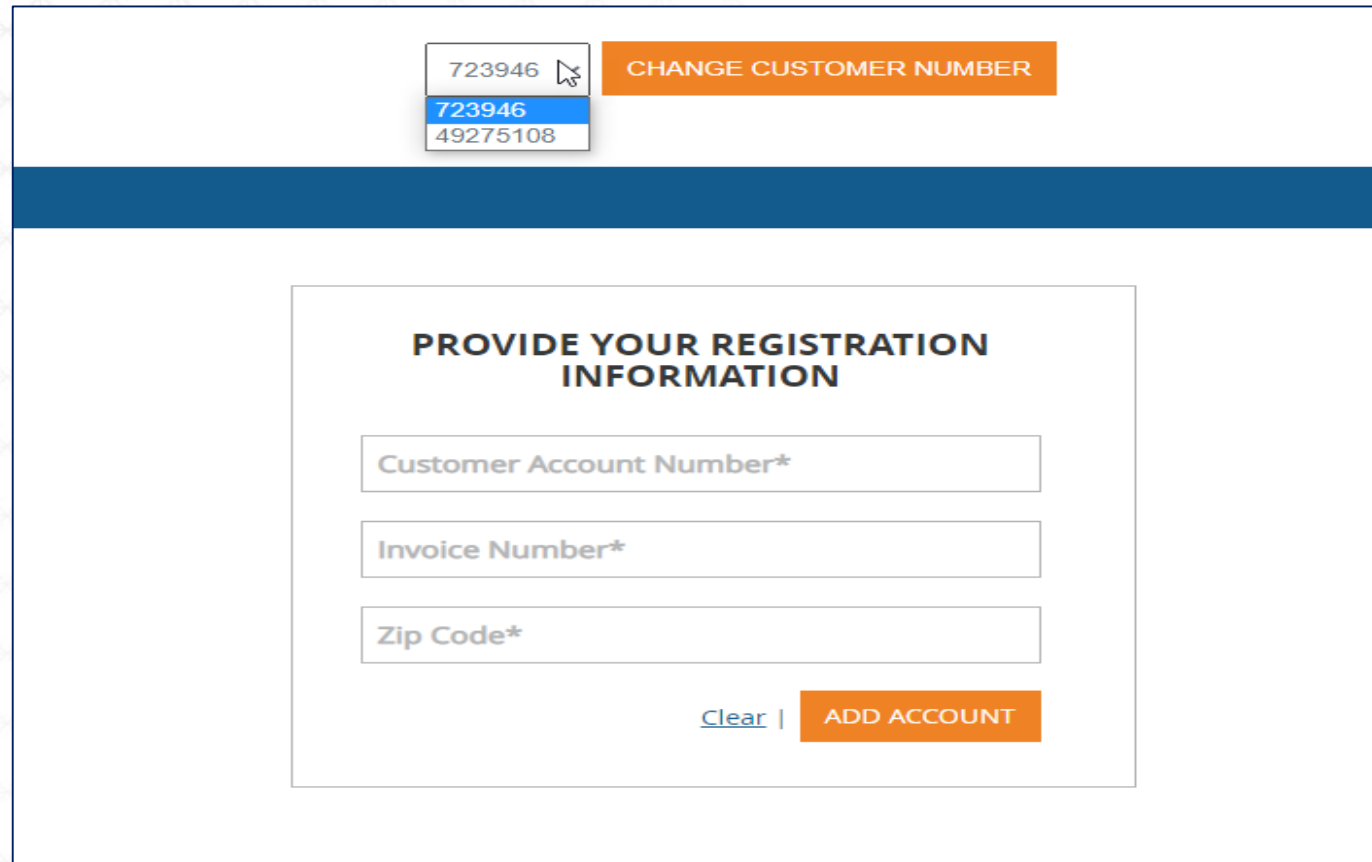
The screenshot shows the Otis Signature Service dashboard. At the top right, there is a dropdown menu with the value '723946' and a 'CHANGE CUSTOMER NUMBER' button. Below this is a dark blue header bar with the word 'ACCOUNT' in white. A dropdown menu is open from the 'ACCOUNT' header, listing several options: 'OPEN INVOICE & PAYMENT', 'PAID INVOICES/RECEIPTS', 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER' (which is highlighted), 'CHANGE PASSWORD', and 'CONTACT FORM'. To the left of the dropdown, there are search filters for 'View Open Invoices', 'Exact Search', 'Invoice Number', 'Invoice Date', and 'Document Type'. To the right, there are 'Date Range' and 'Invoice Number Range' filters. At the bottom center, there is a 'FIND INVOICES' button.



The screenshot shows the Otis Signature Service dashboard with the 'ACCOUNT' header. A mouse cursor is hovering over the 'ACCOUNT' header. Below the header, there is a form titled 'PROVIDE YOUR REGISTRATION INFORMATION'. The form contains three input fields: 'Customer Account Number\*', 'Invoice Number\*', and 'Zip Code\*'. At the bottom right of the form, there is a 'Clear' link and an 'ADD ACCOUNT' button.

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.

Ajoutez des comptes additionnels ou basculez entre ceux-ci en cliquant sur CHANGE CUSTOMER NUMBER et en sélectionnant le compte du menu déroulant.



The screenshot displays a web interface with a dropdown menu and a registration form. The dropdown menu is open, showing three options: 723946 (with a mouse cursor), 723946 (highlighted in blue), 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 is a white box with a blue border containing the text "PROVIDE YOUR REGISTRATION INFORMATION". Inside this box are three input fields: "Customer Account Number\*", "Invoice Number\*", and "Zip Code\*". At the bottom of the box are a "Clear" link and an orange "ADD ACCOUNT" button.

**How to Download  
a copy of your  
invoice**

**Télécharger une  
copie de votre  
facture**

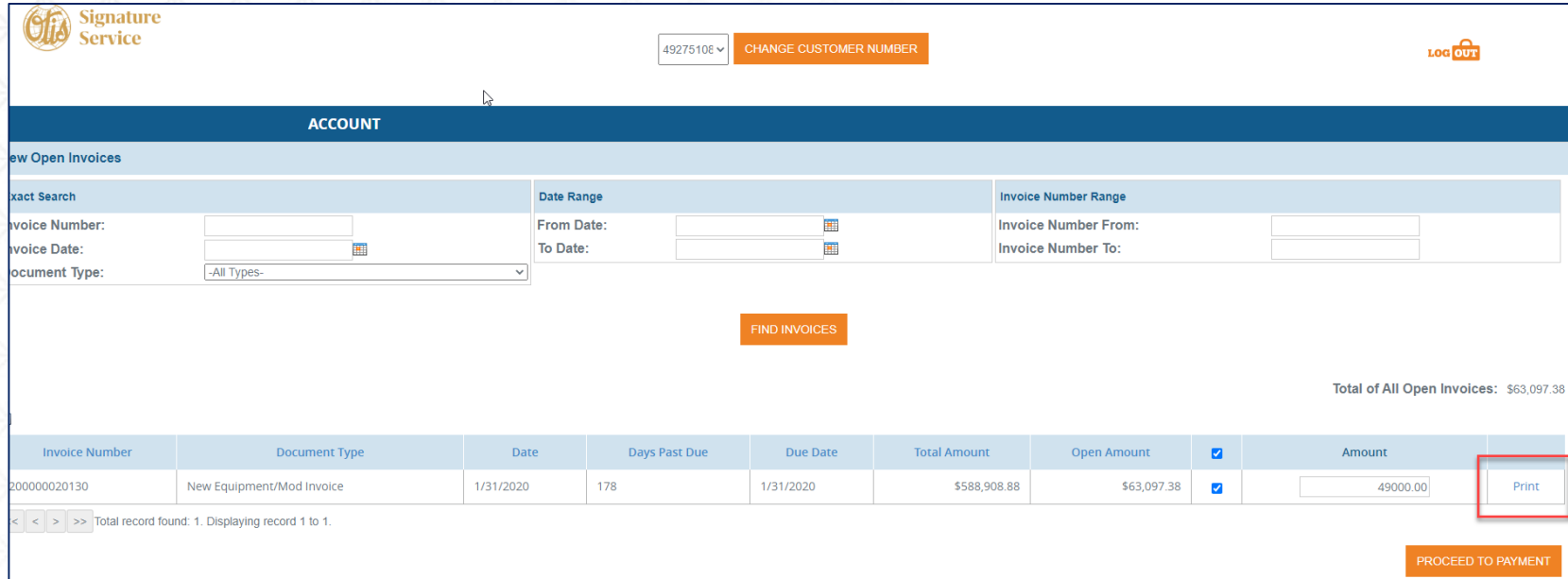




# How to Download a copy of your invoice

## Télécharger une copie de votre facture

If you need a copy of your invoice, you can click on print next to the open amount.  
Pour obtenir une copie de facture, cliquez sur PRINT.




The screenshot shows the Otis Signature Service account portal. At the top, there is a header with the Otis logo and 'Signature Service' text. A dropdown menu shows '4927510E' and a 'CHANGE CUSTOMER NUMBER' button. A 'Log OUT' button is in the top right. Below the header is a blue bar labeled 'ACCOUNT'. Underneath, there is a section for 'New Open Invoices' with search filters for 'Exact Search', 'Date Range', and 'Invoice Number Range'. A 'FIND INVOICES' button is centered below the filters. To the right, it says 'Total of All Open Invoices: \$63,097.38'. Below this is a table 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 \$63,097.38 and a 'Print' button next to it, which is highlighted with a red box. At the bottom right, there is a 'PROCEED TO PAYMENT' button.

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

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](mailto:NSAA.collections@otis.com). Below is an example of the Reference article you will see.

Ceci téléchargera un article de référence (voir exemple ci-dessous) contenant des renseignements de facturation pertinents, mais qui n'est pas une copie exacte de la facture. Si vous désirez obtenir une copie exacte de la facture, veuillez envoyer une demande à [NSAA.collections@otis.com](mailto:NSAA.collections@otis.com)

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

**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				
<b>SHIPPING INSTRUCTIONS</b>				
LINE	DESCRIPTION / ITEM NUMBER	QTY SHIPPED	PRICE	EXTENDED PRICE
001		1	588908.88	588908.88

# Recurring Payment Set Up (Credit Card or ACH) S'inscrire au prélèvement automatique (traitement automatique des chèques et cartes de crédit)

---



# How to set up Automatic Payments on Your Account

## S'inscrire au prélèvement automatique

Make sure you have a payment profile saved first. From your home screen when you login, select Autopay Accounts from the Account Dropdown.

Assurez-vous d'abord d'avoir sauvegardé un profil de paiement. Depuis la page d'accueil, sélectionnez **AUTOPAY ACCOUNTS** dans le menu **ACCOUNT**.

The screenshot shows the Otis Signature Service account management interface. At the top, there is a customer number '275917' and a 'CHANGE CUSTOMER NUMBER' button. A 'LOG OUT' button is also visible. The 'ACCOUNT' dropdown menu is open, showing options: 'OPEN INVOICE & PAYMENT', 'PAID INVOICES/RECEIPTS', 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER', 'CHANGE PASSWORD', 'CONTACT FORM', and 'AUTOPAY ACCOUNTS' (highlighted with a red box). The main page features a search area with 'Exact Search' and 'View Open Invoices' sections. The 'Exact Search' section includes fields for 'Invoice Number:', 'Invoice Date:', and 'Document Type:'. The 'View Open Invoices' section includes 'Date Range' (From Date: and To Date:), 'Invoice Number Range' (Invoice Number From: and Invoice Number To:), and a 'FIND INVOICES' button. Below the search area, there is a table of open invoices with columns: Invoice Number, Document Type, Date, Days Past Due, Due Date, Total Amount, Open Amount, a checkbox, and Amount. The total of all open invoices is \$8,414.49.

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount	<input type="checkbox"/>	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:  
Dans cet écran, cliquez sur **ADD NEW AUTOPAY ACCOUNT**.

The screenshot displays the Otis Signature Service account management interface. At the top left is the Otis Signature Service logo. To the right, there is a dropdown menu showing '275917' and a 'CHANGE CUSTOMER NUMBER' button. Further right is a 'LOG OUT' button. Below this is a blue header bar labeled 'ACCOUNT'. Underneath is a table with the following columns: Payment Profile, Payment On, Contract, and Customer Number. The table contains three rows of data, each with a 'DELETE' button in the fifth column. Below the table, there are navigation controls and the text 'Total records found: 3. Displaying record 1 to 3.' At the bottom left, an 'ADD NEW AUTOPAY ACCOUNT' button is highlighted with a red rectangular box.

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

Select the day of the month that you want to have your payment withdrawn or charged to your credit card:  
Sélectionnez ensuite le jour du mois auquel le paiement sera retiré de votre compte ou porté à votre carte de crédit.

The screenshot displays the 'Auto Payment - EASYCommerce' window. The 'Auto Payment Frequency' is set to 'Monthly'. The 'Payment On:' dropdown menu is open, showing a list of days from 1 to 20. A red box highlights the '1' option, which is also highlighted in blue in the dropdown. The background shows a table of payment profiles with columns for 'Payment Profile' and 'Day'.

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

Select the payment method that you want to use for the recurring payments:  
Sélectionnez le mode de paiement qui sera utilisé pour les paiements répétitifs.

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

Payment Profile	Customer Number	DELETE
Visa ending in 6785	27	DELETE
Visa ending in 6785	27	DELETE
Visa ending in 5236	31	DELETE

Select the contract that you want to use for the recurring payments:  
Sélectionnez le contrat associé aux paiements répétitifs.

Auto Payment - EASYCommerce

Auto Payment Frequency: Monthly

Payment On: 1

Payment Profile: Visa ending in 4115

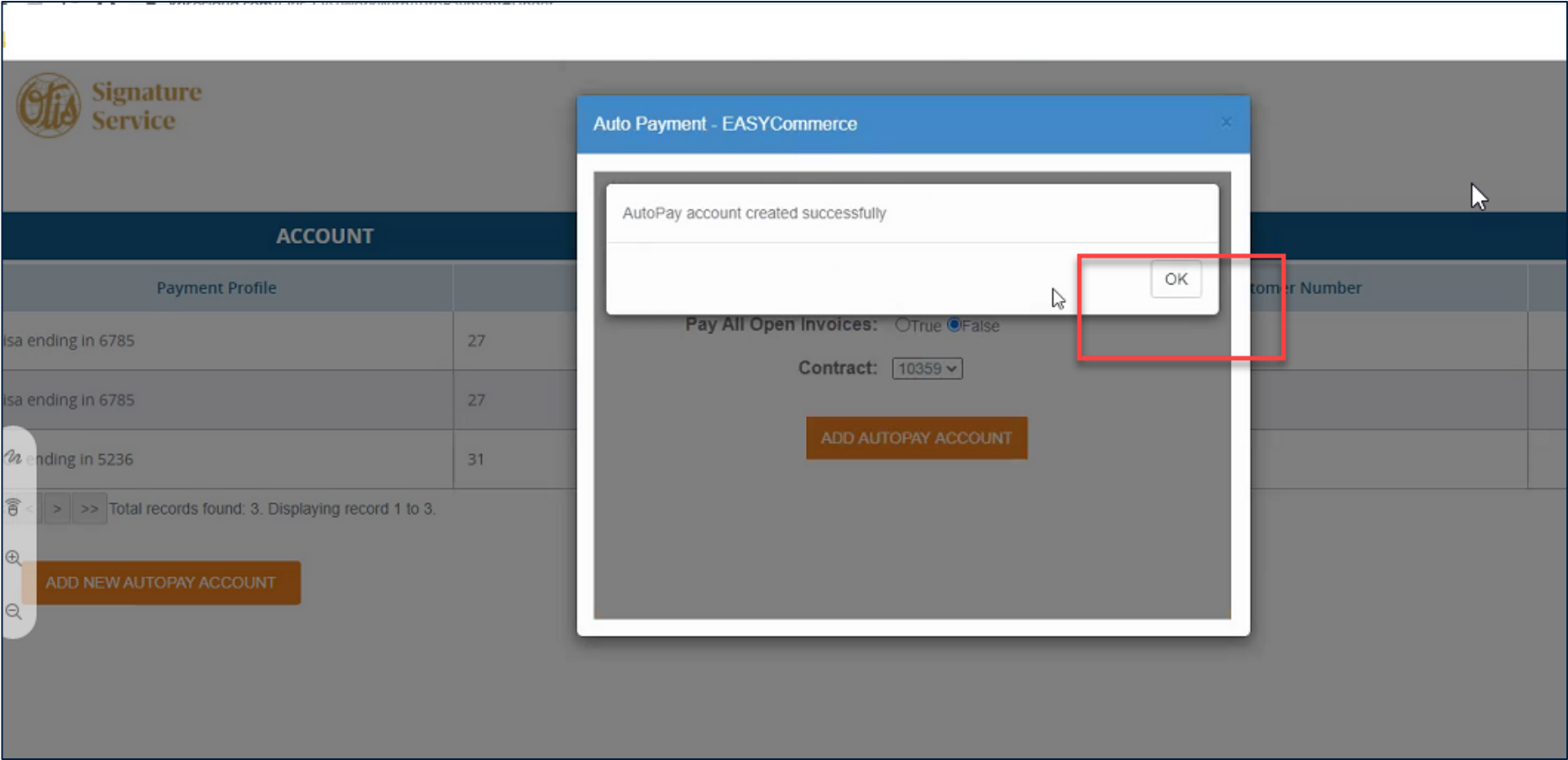
Pay All Open Invoices:  True  False

Contract: 10349  
10349  
10359  
10373  
10390

ADD AUTO COUNT



You will see a message that the Autopay account has been created separately.  
Un message s'affichera vous indiquant que le compte Autopay a été créé avec succès.



**OTIS**