Payment Portal
Reference Guide

Otis Payment Portal

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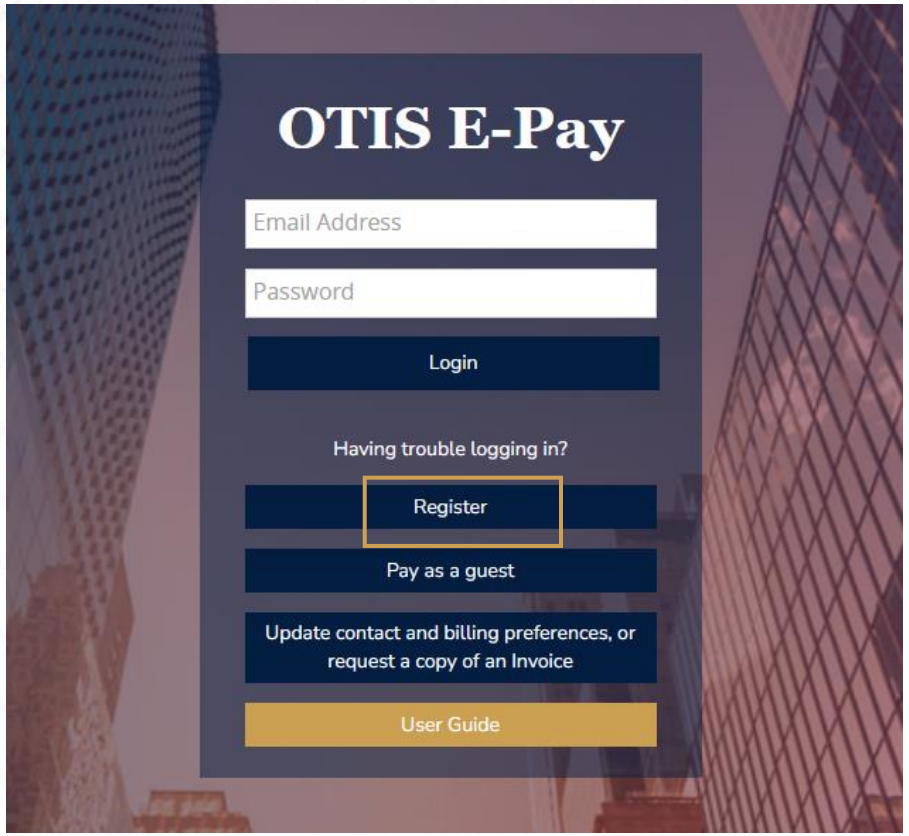
Customer Creates an Account

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 Register



Sample of Invoice Coupon and where to find Customer Number and Invoice Number.

DETACH DOCUMENT ALONG PERFORATION. ENCLOSE AND RETURN THIS COUPON WITH YOUR PAYMENT.

OTIS

5500 Village Blvd, Suite 102 West Palm Beach FL 33407

CUSTOMER NO.:	A	12345678
DATE:		6/15/2020
INVOICE NO.:	B	100400000005
TOTAL SERVICE CONTRACT AMOUNT:		$ 194.98

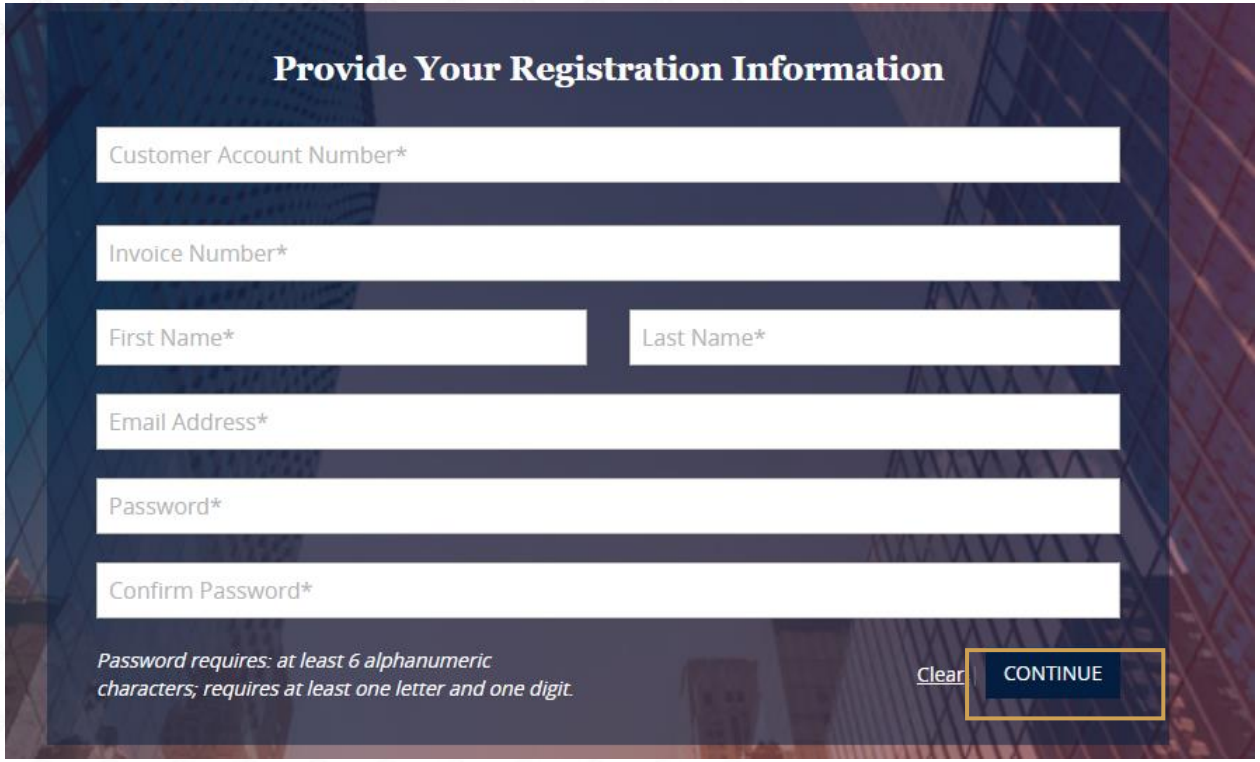
MAKE CHECK PAYABLE TO:

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

Otis Elevator Company
PO Box 13716
Newark NJ 07188-0716

100400012736 0000019498 5

Fill in all fields and click Continue

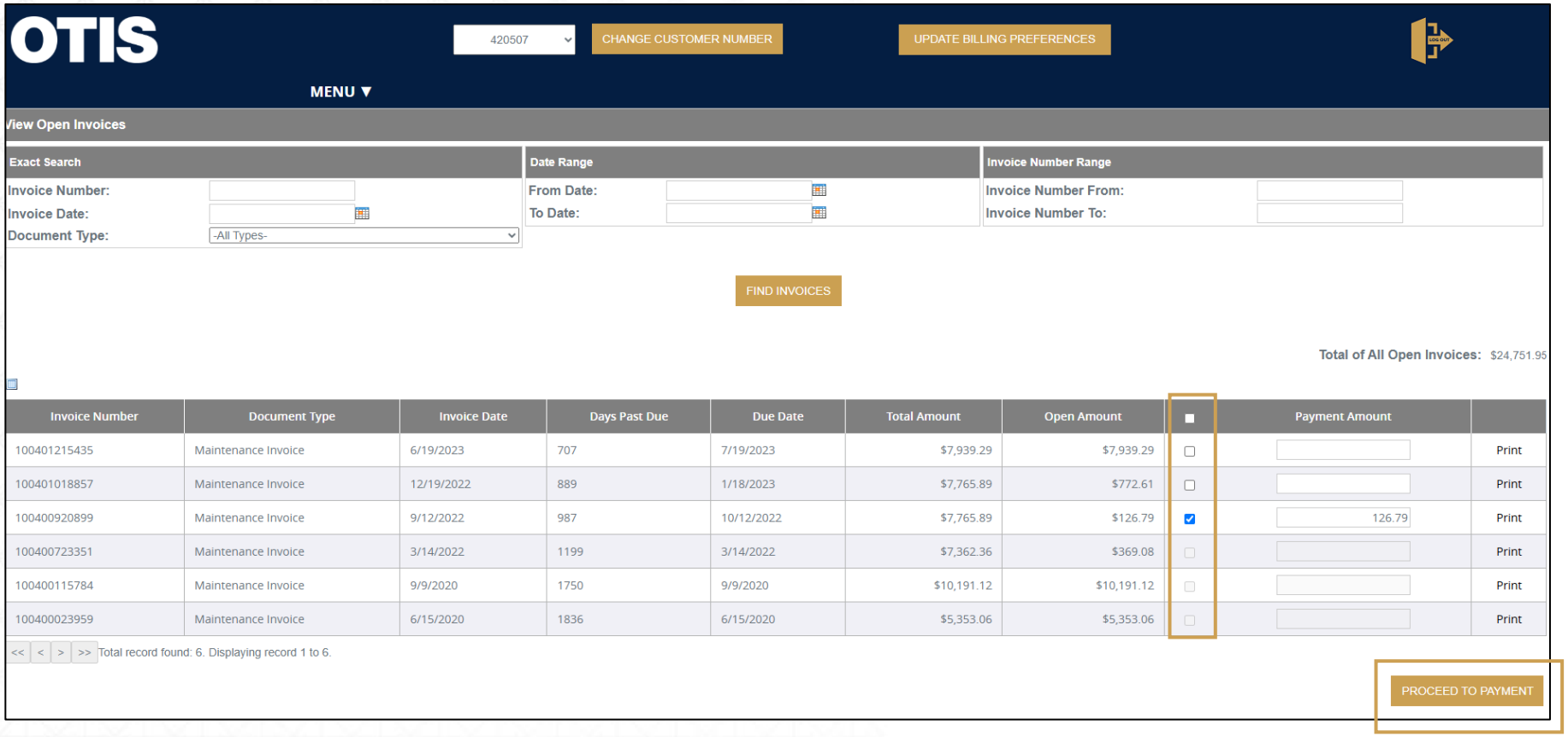


The first screen you will be taken to is all open invoices on the account. *Email address entered, will be the Log In ID.

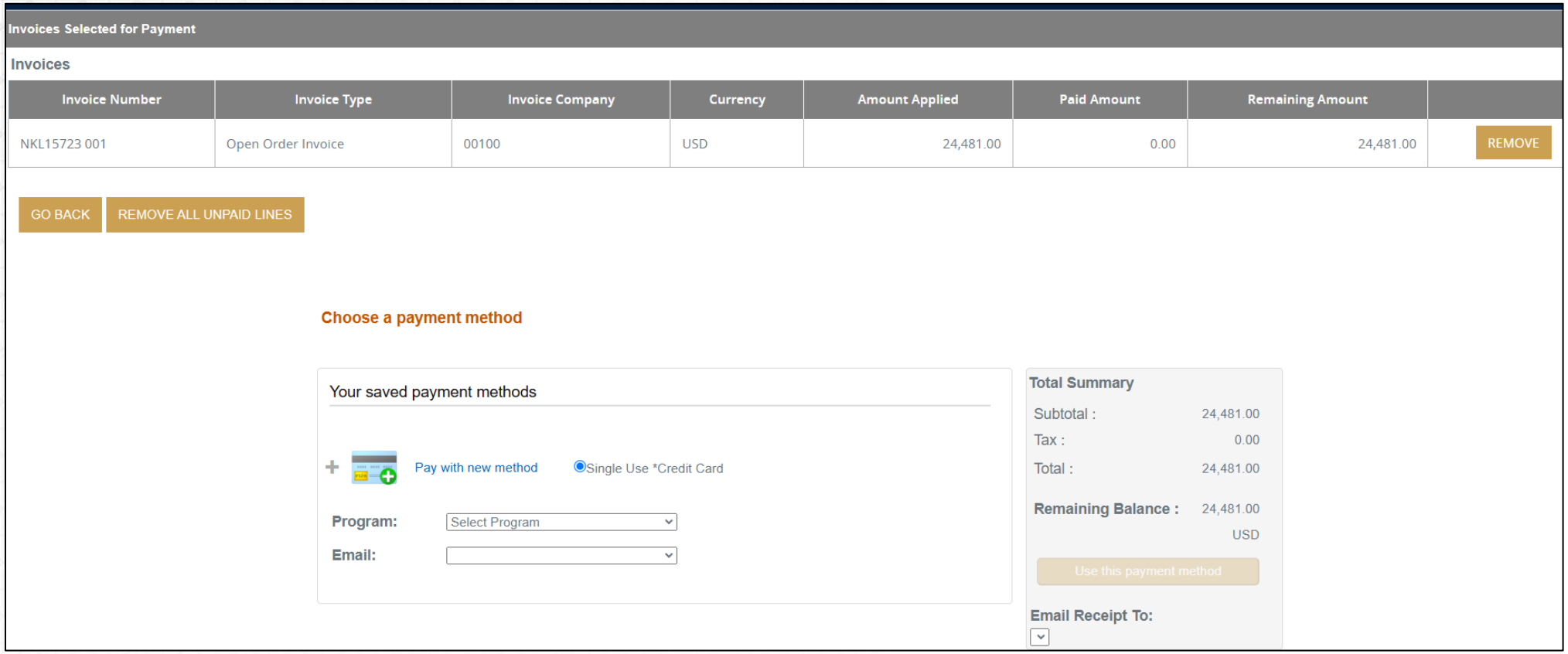
Making a Payment

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. Once invoices are selected click proceed to payment button in bottom corner.



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.



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

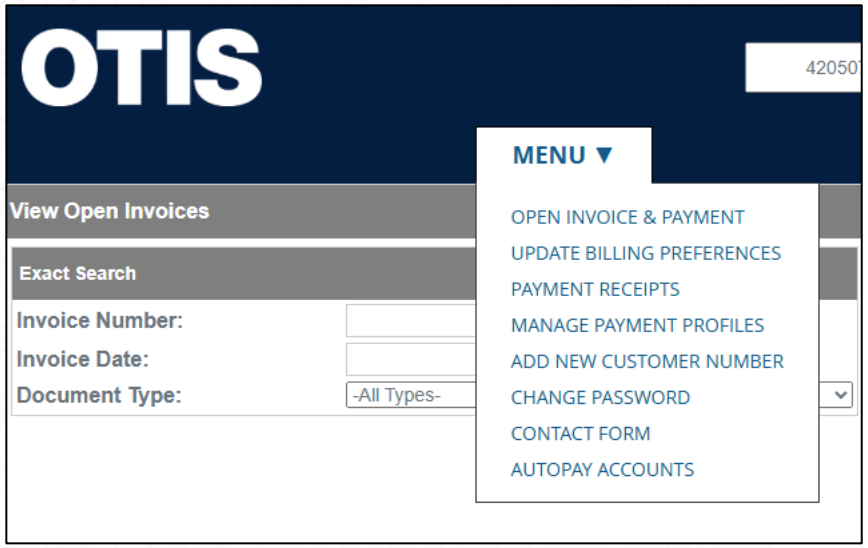
Paid Invoices

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
XXXXXXXXXXX1111	SALE	100	5ED7C01327F9EB17A99F745A8B8E774F094D53C8		Approved and Completed	APPROVED	2020/06/03 15:22:12	sean.qa@test.com

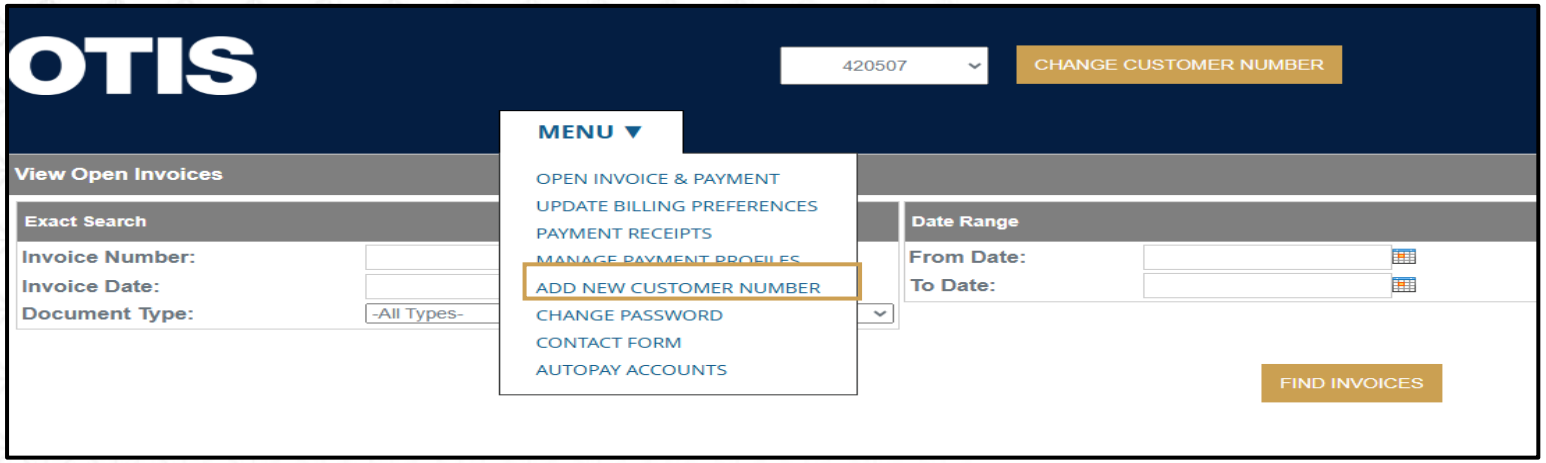
Hovering over Menu as shown below will bring up an option menu to see receipts for past payments, manage payment profiles, and change your settings, etc.

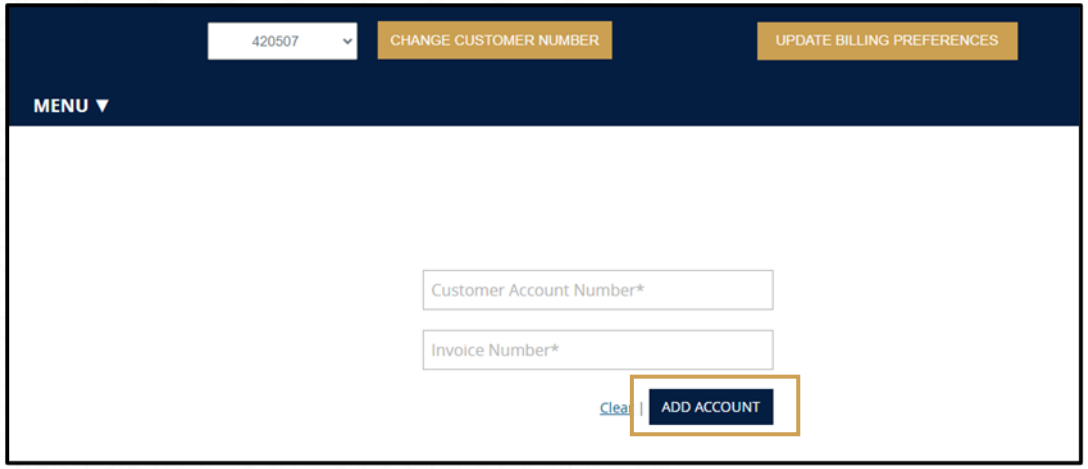


Adding additional customer numbers to your profile

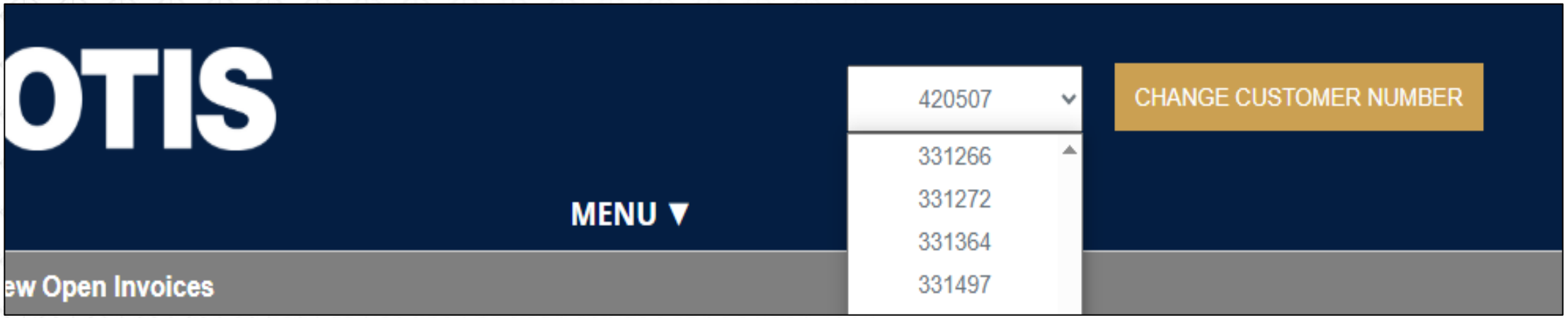
Adding additional customer numbers to your profile

Hover over menu and select add new customer number. In the next screen, enter the Customer Number and Invoice Number for the account you want to add, then click 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.



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)

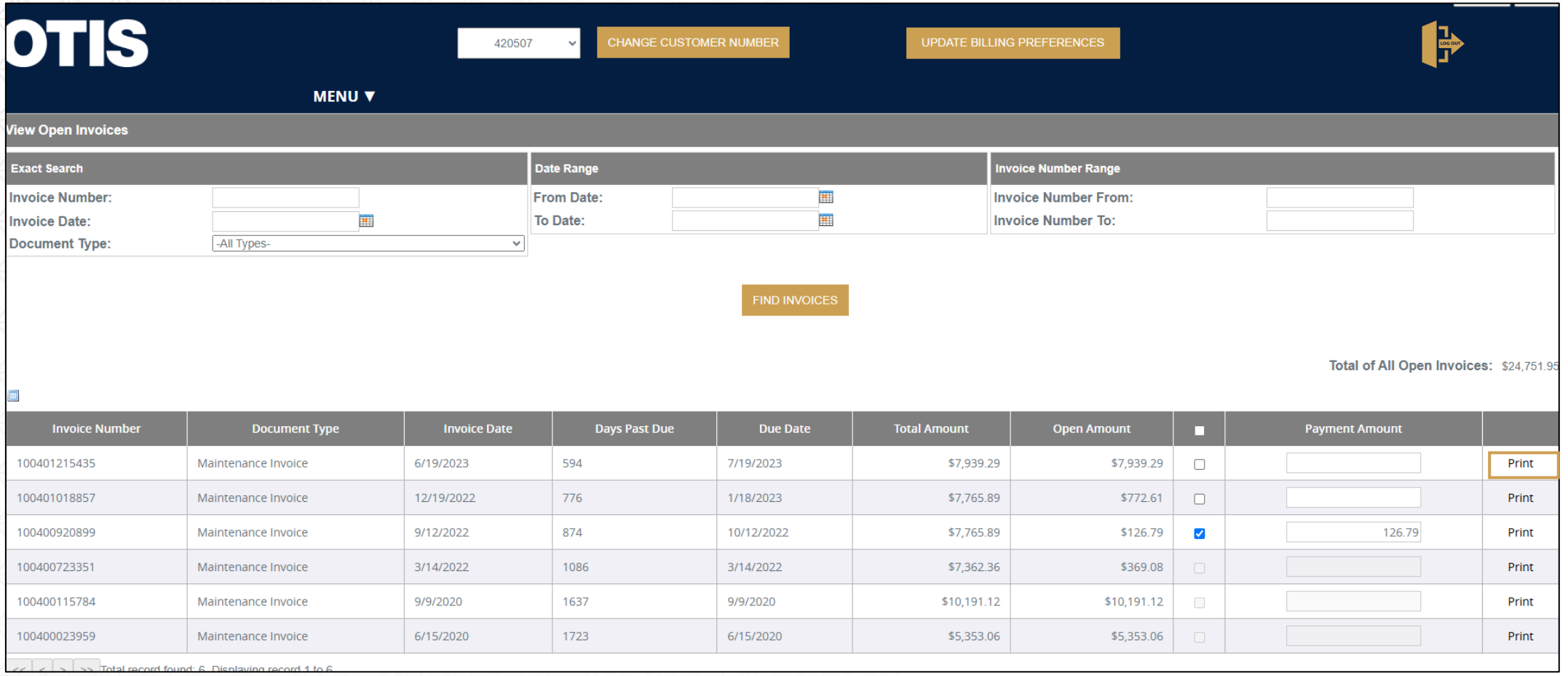
The example below is of a consolidated invoice, you will see that the invoice number is repeated but under separate customer numbers. Each customer number should be added separately.

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

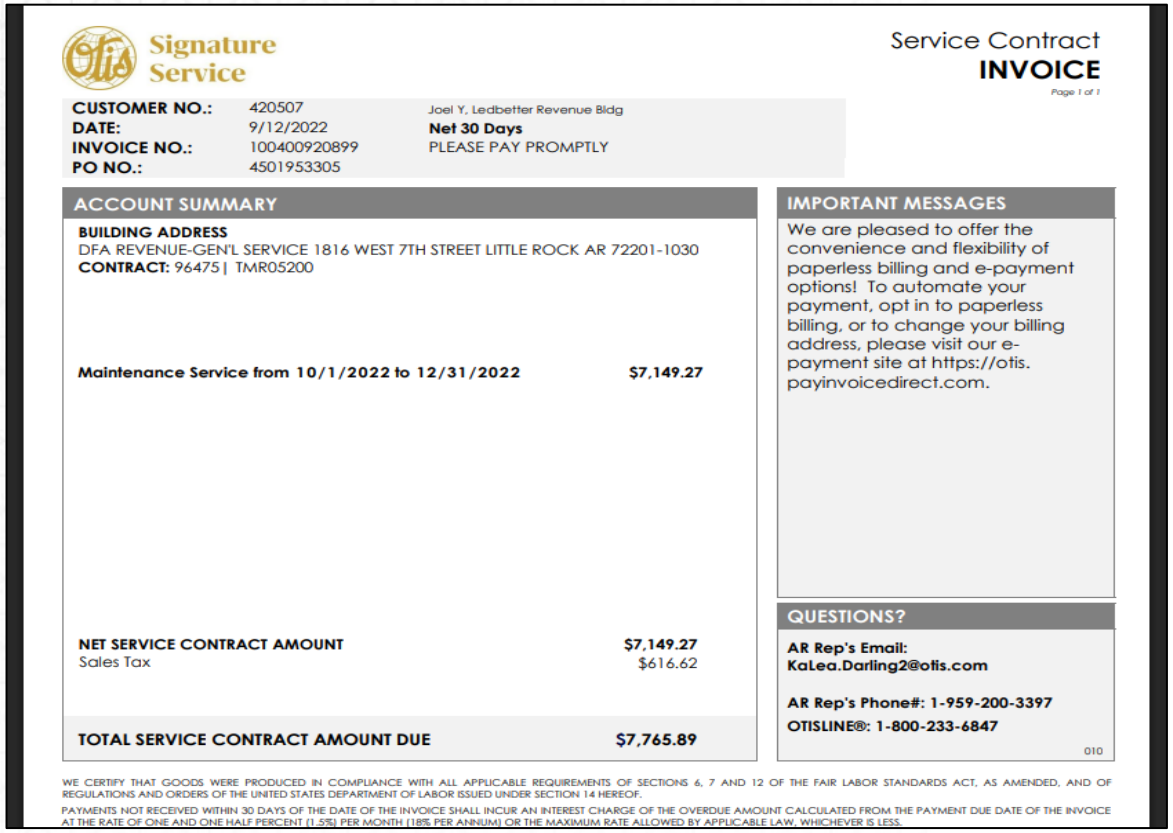
How to Download a copy of your invoice

If you need a copy of your invoice, you can click on print next to the open amount.



How to Download a copy of your invoice

The invoice copy will then open for you to download and save.



Signature Service

Service Contract
INVOICE

Page 1 of 1

CUSTOMER NO.:	420507	Joel Y. Ledbetter Revenue Bldg
DATE:	9/12/2022	**Net 30 Days**
INVOICE NO.:	100400920899	PLEASE PAY PROMPTLY
PO NO.:	4501953305	

ACCOUNT SUMMARY

BUILDING ADDRESS
DFA REVENUE-GEN'L SERVICE 1816 WEST 7TH STREET LITTLE ROCK AR 72201-1030
CONTRACT: 96475 | TMR05200

Maintenance Service from 10/1/2022 to 12/31/2022	**$7,149.27**
NET SERVICE CONTRACT AMOUNT	**$7,149.27**
Sales Tax	$616.62
TOTAL SERVICE CONTRACT AMOUNT DUE	**$7,765.89**

IMPORTANT MESSAGES

We are pleased to offer the convenience and flexibility of paperless billing and e-payment options! To automate your payment, opt in to paperless billing, or to change your billing address, please visit our e-payment site at https://otis.payinvoicedirect.com.

QUESTIONS?

AR Rep's Email:
KaLea.Darling2@otis.com

AR Rep's Phone#: 1-959-200-3397
OTISLINE®: 1-800-233-6847

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WE CERTIFY THAT GOODS WERE PRODUCED IN COMPLIANCE WITH ALL APPLICABLE REQUIREMENTS OF SECTIONS 6, 7 AND 12 OF THE FAIR LABOR STANDARDS ACT, AS AMENDED, AND OF REGULATIONS AND ORDERS OF THE UNITED STATES DEPARTMENT OF LABOR ISSUED UNDER SECTION 14 HEREOF.

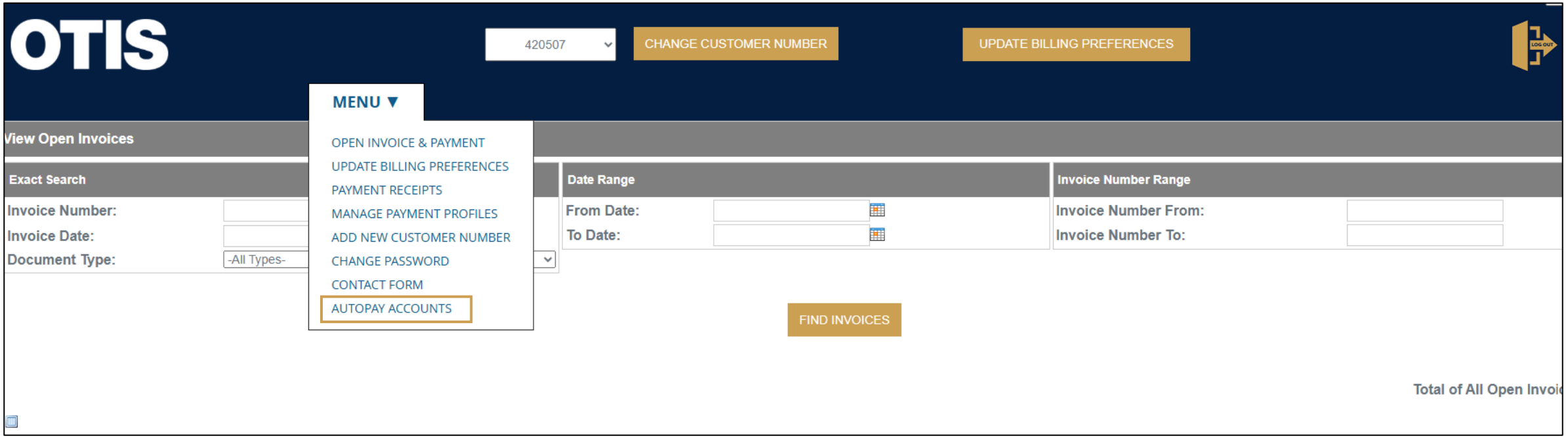
PAYMENTS NOT RECEIVED WITHIN 30 DAYS OF THE DATE OF THE INVOICE SHALL INCUR AN INTEREST CHARGE OF THE OVERDUE AMOUNT CALCULATED FROM THE PAYMENT DUE DATE OF THE INVOICE AT THE RATE OF ONE AND ONE HALF PERCENT (1.5%) PER MONTH (18% PER ANNUM) OR THE MAXIMUM RATE ALLOWED BY APPLICABLE LAW, WHICHEVER IS LESS.

Recurring Payment Set Up (Credit Card or ACH)

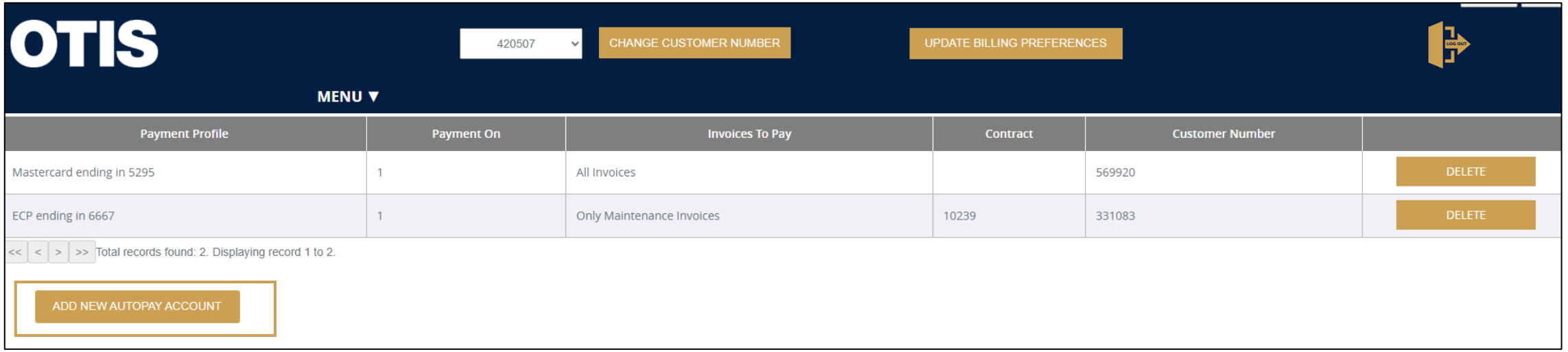
How to set up Automatic Payments on Your Account

Make sure you have a payment profile saved first.

From your home screen when you login, click on Menu and select Autopay Accounts from the dropdown list.

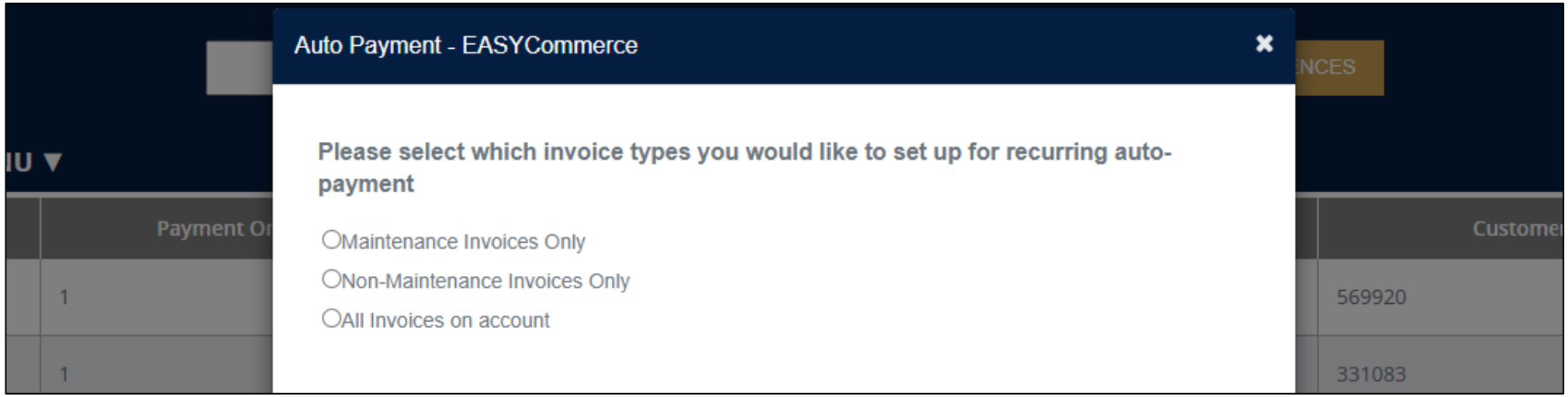


On the next screen click Add New Autopay Account as shown below:



Select the invoice type that you would like to set up for recurring payment:

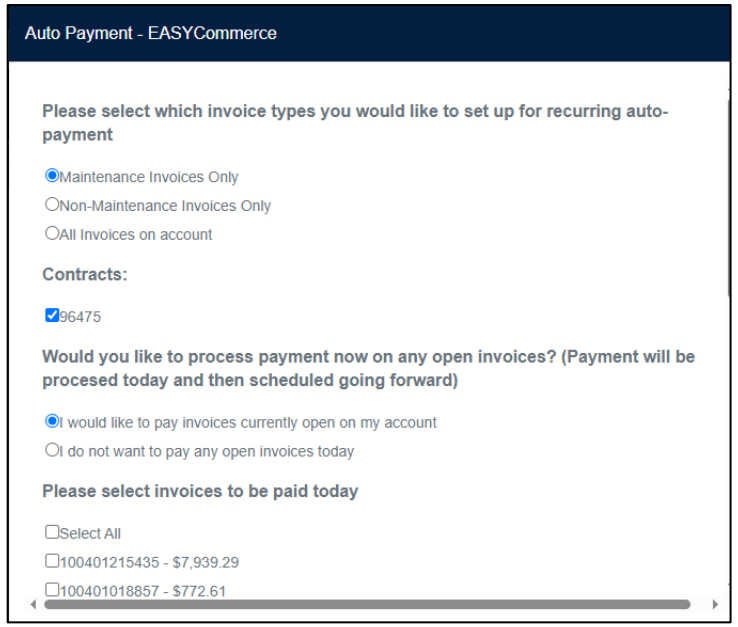
- **Maintenance Invoices Only** – invoices billed per the service contract
- **Non-Maintenance Invoices Only** – invoices for services outside the scope of the service contract including modernization and/or new construction
- **All Invoices on account** – both maintenance and non-maintenance invoices



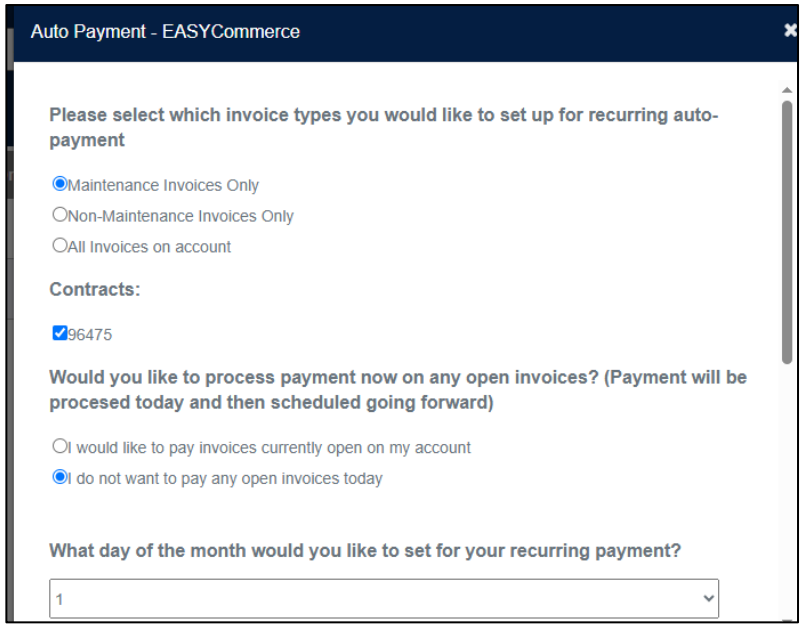
If **Maintenance Invoices Only** is selected the following screen will open and the contract #(s) will display.

- Click the box next to the contract(s) # that you would like to set up for recurring payments.
- If there are open invoices, you will see the question shown below under Contracts. You will need to choose one of the options to move forward. (if you select to pay you will have the choice to select the invoice(s) to pay or all invoices)
- If there are no open invoices on the account, that question will not appear.

Example - Open Invoices



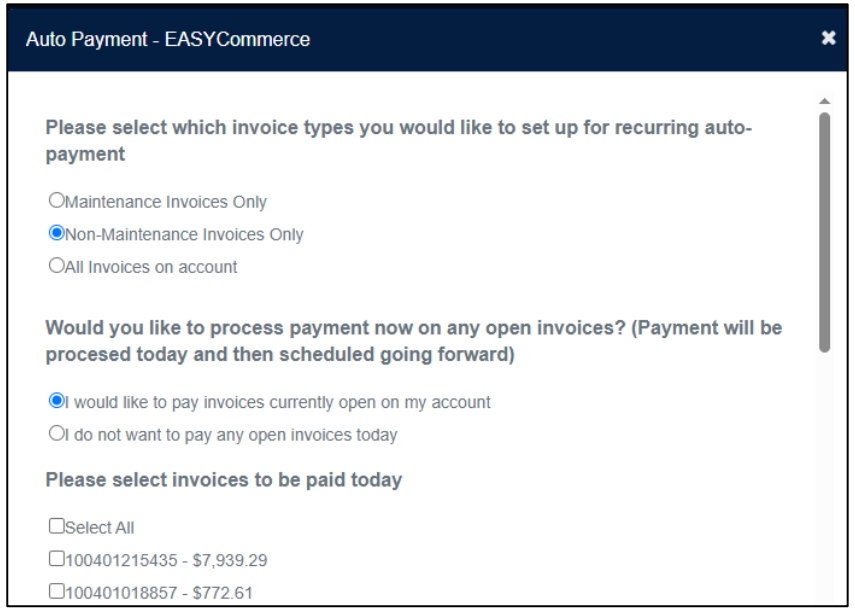
Example – No Open Invoice



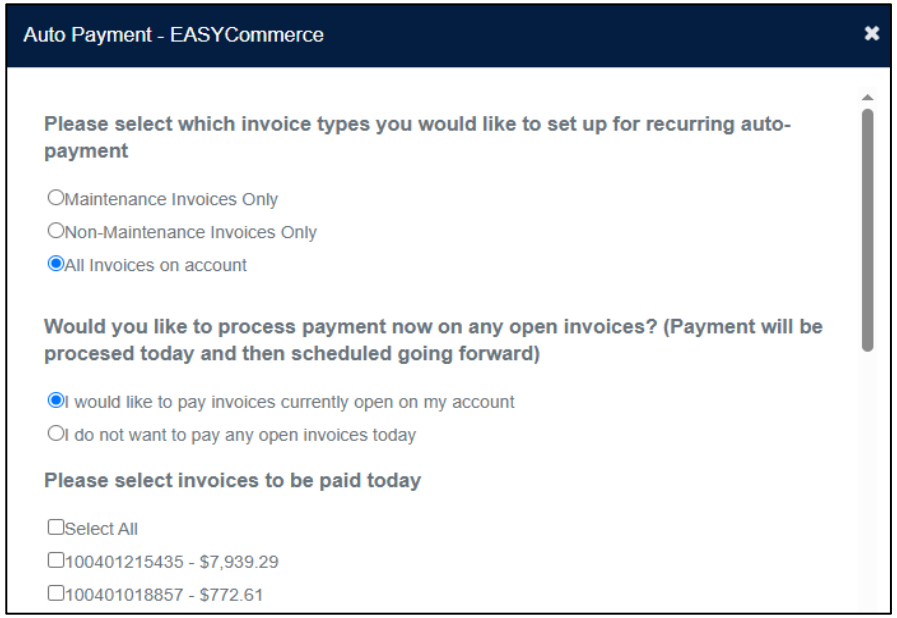
If selecting **Non - Maintenance Invoices Only or All Invoices on account**

- If there are open invoices, you will see the question shown below. You will need to choose one of the options to move forward. (if you select to pay you will have the choice to select the invoice(s) to pay or all invoices)
- If no open invoices that question will not appear.

Example - Non- Maintenance

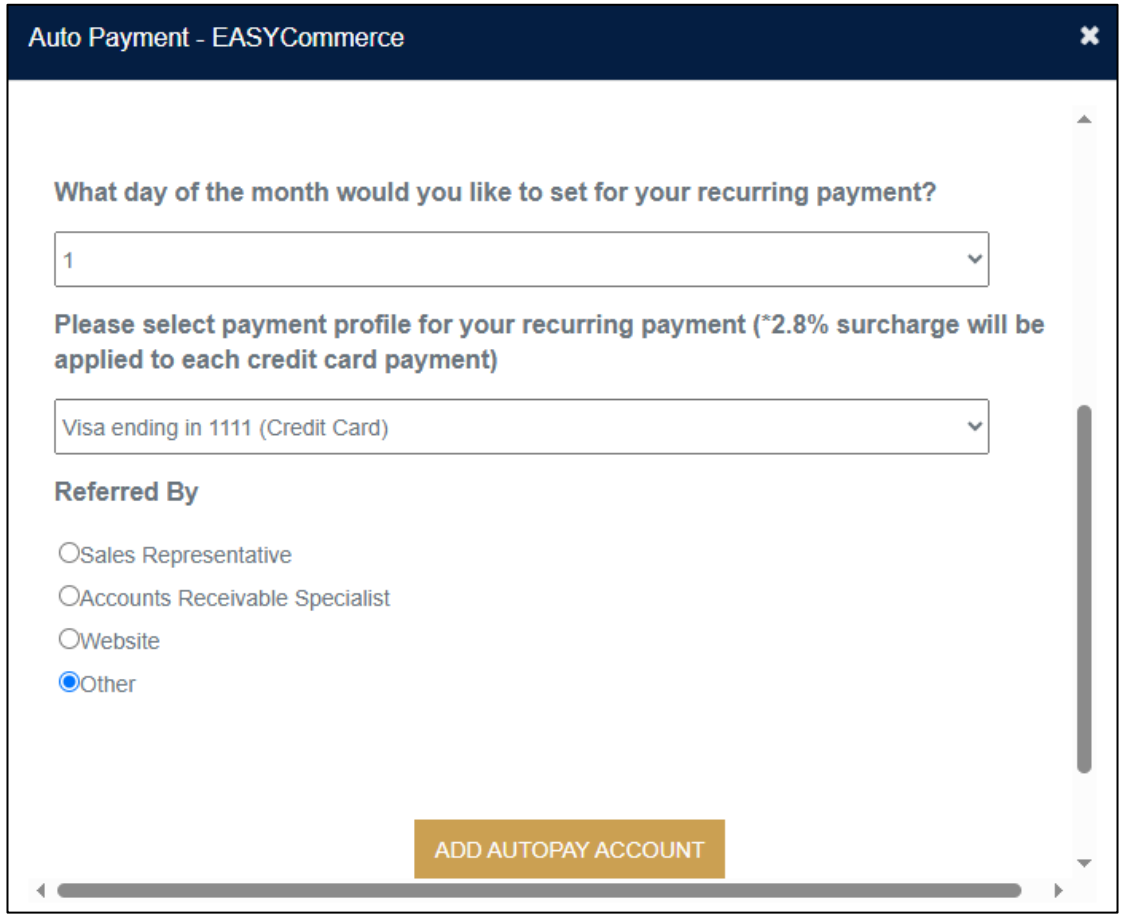


Example – All Invoices on account

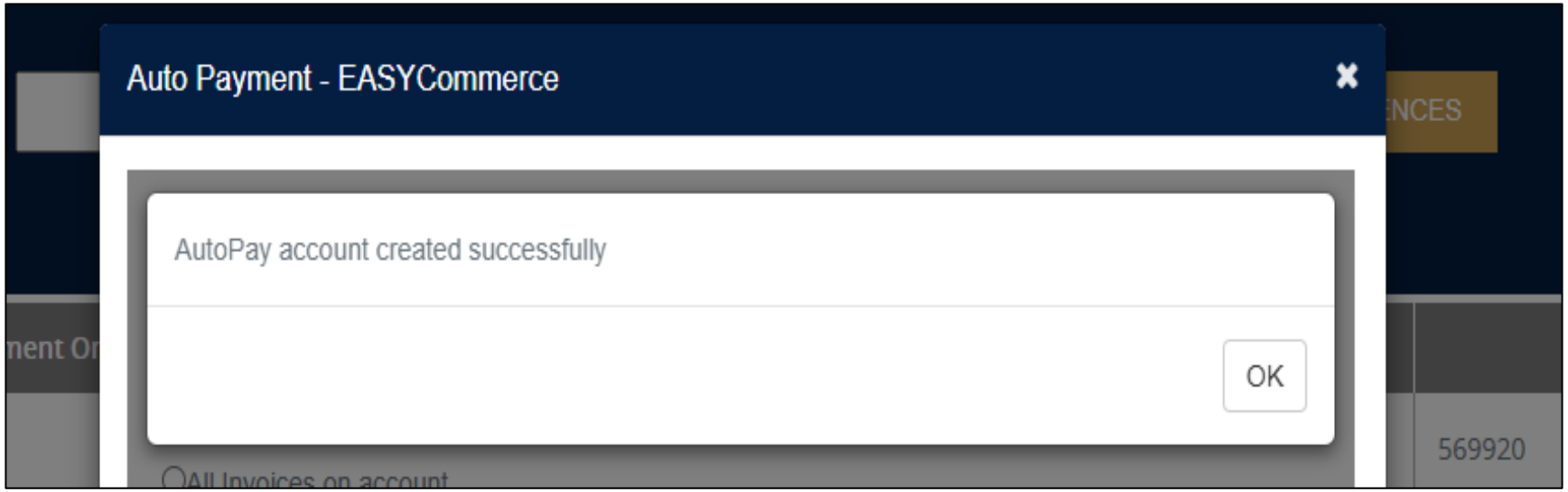


Select the day of the month that you want to have your payment withdrawn or charged to your credit card.

Then choose the payment profile to use for the recurring payments, select an option under Referred by and click add autopay account.

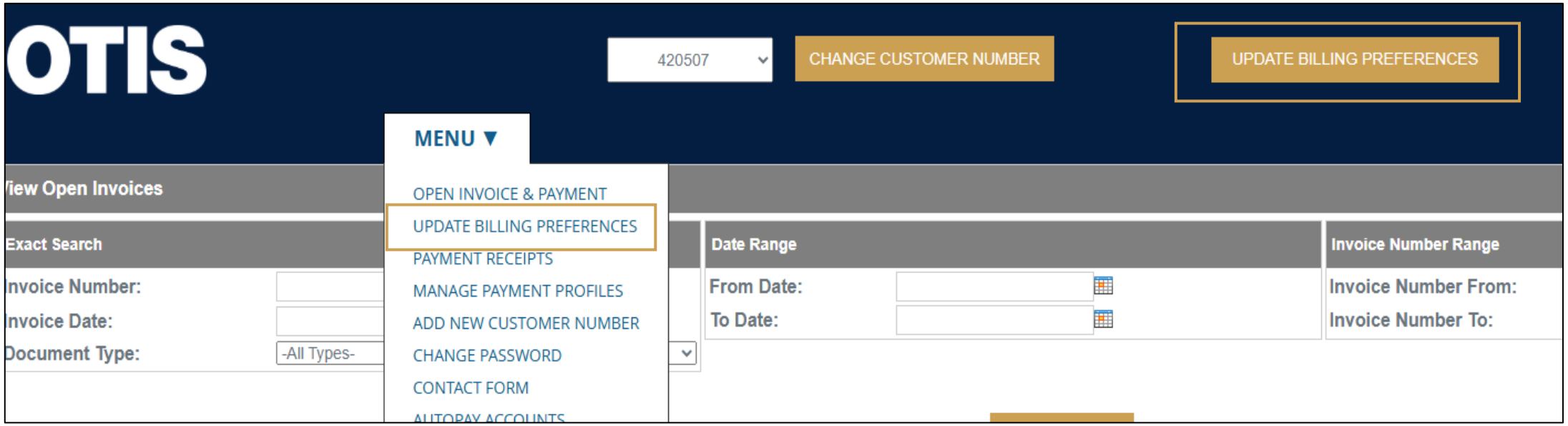


You will see a message that the Autopay account has been created separately.

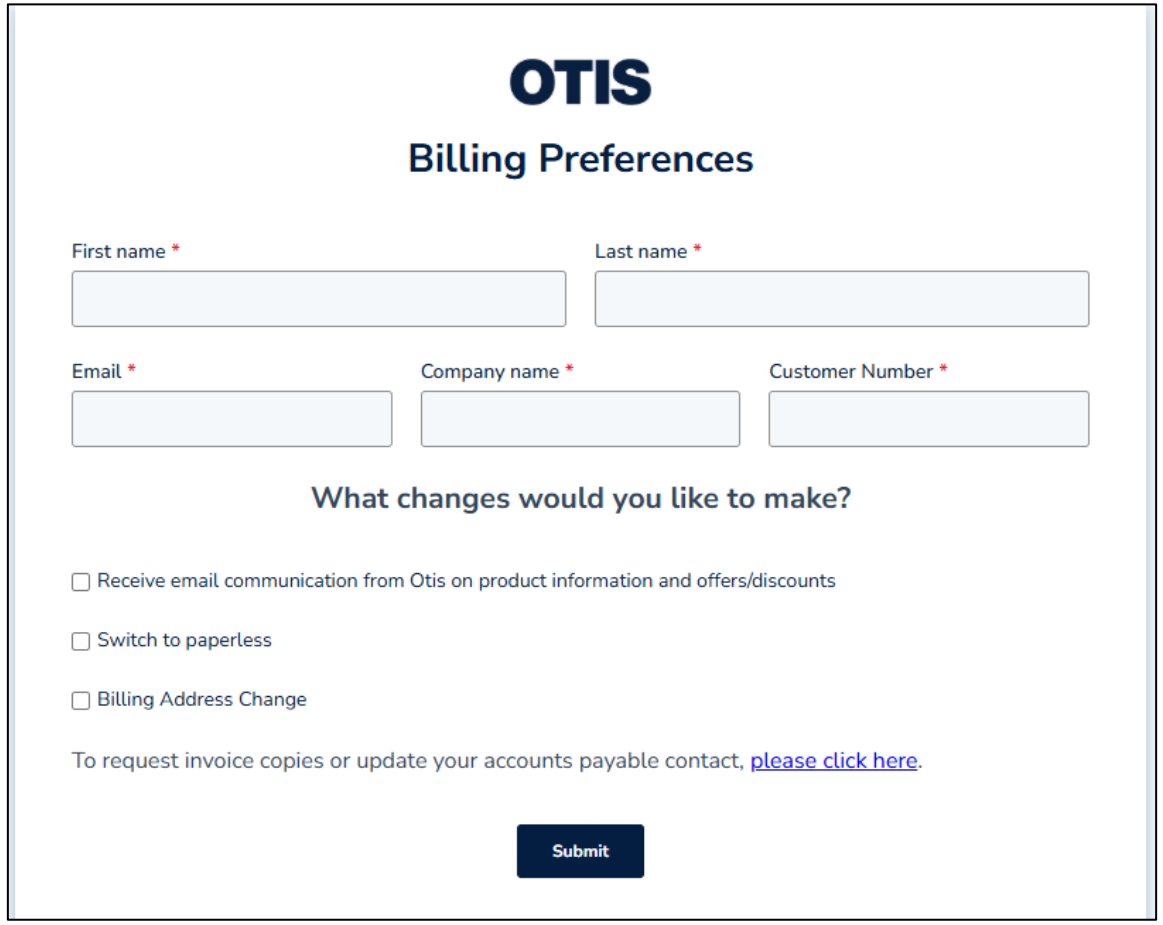


Updating Billing Preferences

To update your Billing preferences, Click on the button at the top right corner or from the drop-down menu.



From there, you can switch to paperless invoicing, change your billing address, update contact information or request invoice copies. (Please allow 1 week for billing changes to take effect)



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