

Payment Portal Reference Guide

Otis Payment Portal



Table of Contents

- ◆ [How to Create an Account/Register for electronic payments](#)
- ◆ [How to Make a Payment](#)
- ◆ [How to Add Additional Customer Numbers to your Profile](#)
- ◆ [How to Download a Copy of your Invoice](#)
- ◆ [How to sign up for Automatic Recurring Payments \(ACH and Credit Cards\)](#)
- ◆ [Update billing address or invoice delivery method](#)



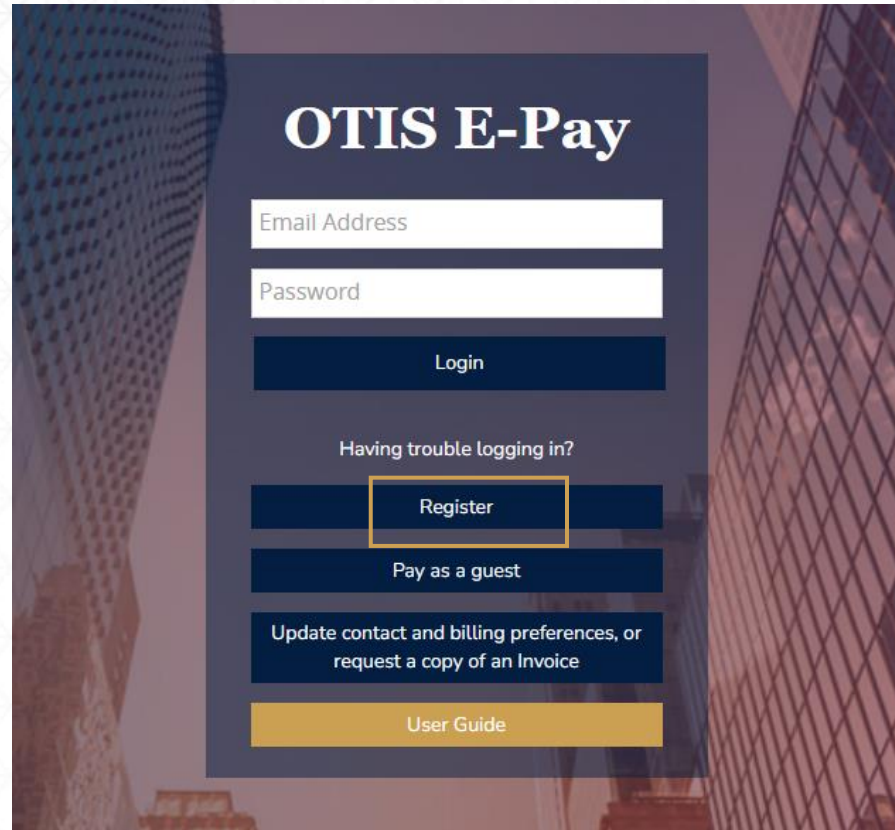
Customer Creates an Account



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



OTIS E-Pay

Email Address

Password

Login

Having trouble logging in?

Register

Pay as a guest

Update contact and billing preferences, or request a copy of an Invoice

User Guide

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

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

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 Elevator Company. 2025



**Signature
Service™**

Fill in all fields and click Continue

Provide Your Registration Information

Customer Account Number*

Invoice Number*

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**

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.

OTIS

420507

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

MENU

View Open Invoices

Exact Search

Invoice Number:

Invoice Date:

Document Type:

All Types

Date Range

From Date:

To Date:

Invoice Number Range

Invoice Number From:

Invoice Number To:

FIND INVOICES

Total of All Open Invoices: \$24,751.95

Invoice Number	Document Type	Invoice Date	Days Past Due	Due Date	Total Amount	Open Amount		Payment Amount	
100401215435	Maintenance Invoice	6/19/2023	707	7/19/2023	\$7,939.29	\$7,939.29	<input type="checkbox"/>	<input type="text"/>	Print
100401018857	Maintenance Invoice	12/19/2022	889	1/18/2023	\$7,765.89	\$772.61	<input type="checkbox"/>	<input type="text"/>	Print
100400920899	Maintenance Invoice	9/12/2022	987	10/12/2022	\$7,765.89	\$126.79	<input checked="" type="checkbox"/>	<input type="text" value="126.79"/>	Print
100400723351	Maintenance Invoice	3/14/2022	1199	3/14/2022	\$7,362.36	\$369.08	<input type="checkbox"/>	<input type="text"/>	Print
100400115784	Maintenance Invoice	9/9/2020	1750	9/9/2020	\$10,191.12	\$10,191.12	<input type="checkbox"/>	<input type="text"/>	Print
100400023959	Maintenance Invoice	6/15/2020	1836	6/15/2020	\$5,353.06	\$5,353.06	<input type="checkbox"/>	<input type="text"/>	Print

<< < > >> Total record found: 6. Displaying record 1 to 6.

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.

Invoices Selected for Payment

Invoices

Invoice Number	Invoice Type	Invoice Company	Currency	Amount Applied	Paid Amount	Remaining Amount	
NKL15723 001	Open Order Invoice	00100	USD	24,481.00	0.00	24,481.00	REMOVE

GO BACK

REMOVE ALL UNPAID LINES

Choose a payment method

Your saved payment methods

Pay with new method

Single Use *Credit Card

Program:

Select Program

Email:

Total Summary

Subtotal :

24,481.00

Tax :

0.00

Total :

24,481.00

Remaining Balance :

24,481.00

USD

Use this payment method

Email Receipt To:

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

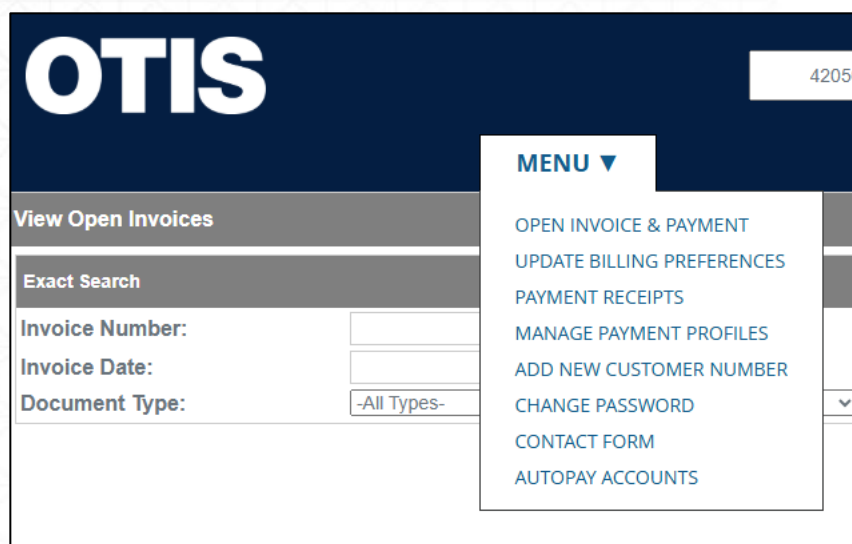
Paid Invoices

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

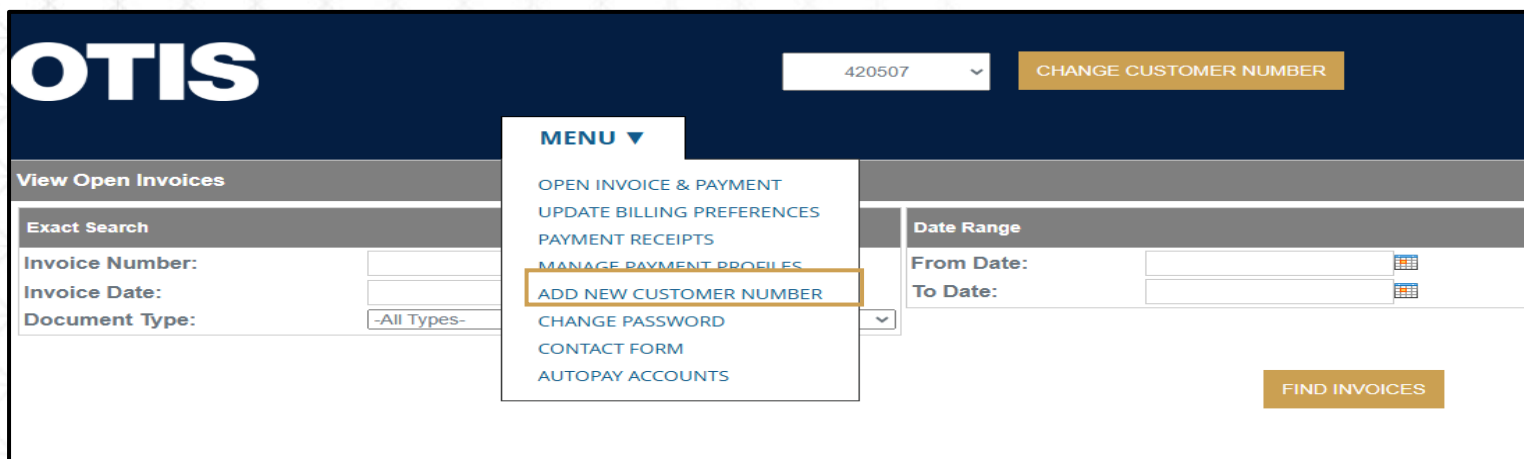


Adding additional customer numbers to your profile

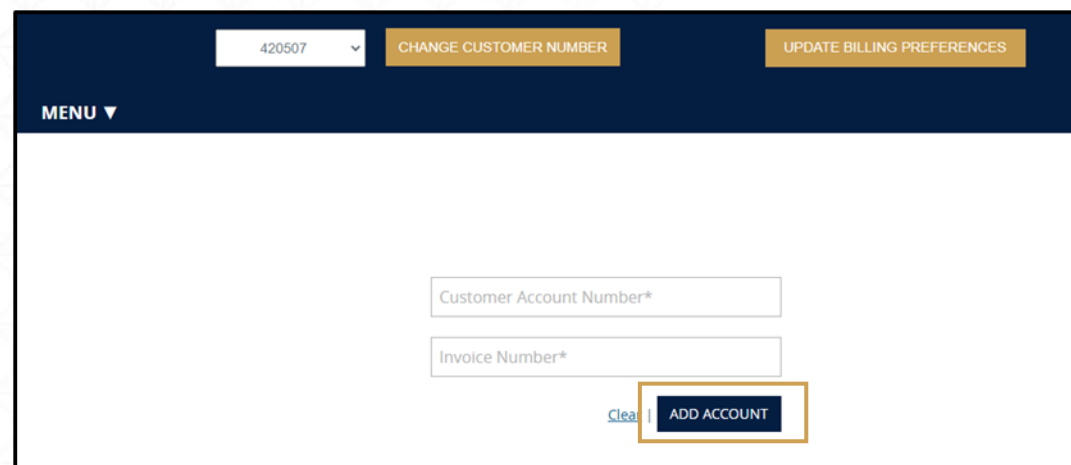


Adding additional customer numbers to your profile

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.



The screenshot shows the OTIS user interface. At the top, there is a dark blue header with the OTIS logo on the left, a dropdown menu showing '420507', and a 'CHANGE CUSTOMER NUMBER' button. Below the header, there is a 'View Open Invoices' section. On the left, there is an 'Exact Search' form with fields for 'Invoice Number:', 'Invoice Date:', and 'Document Type:' (with a '-All Types-' dropdown). On the right, there is a 'Date Range' section with 'From Date:' and 'To Date:' fields, each with a calendar icon. A 'FIND INVOICES' button is at the bottom right. A 'MENU' dropdown is open in the center, listing several options: 'OPEN INVOICE & PAYMENT', 'UPDATE BILLING PREFERENCES', 'PAYMENT RECEIPTS', 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER' (highlighted with a yellow border), 'CHANGE PASSWORD', 'CONTACT FORM', and 'AUTOPAY ACCOUNTS'.



The screenshot shows the 'ADD ACCOUNT' screen. At the top, there is a dark blue header with a dropdown menu showing '420507', a 'CHANGE CUSTOMER NUMBER' button, and an 'UPDATE BILLING PREFERENCES' button. Below the header, there is a 'MENU' dropdown. The main content area has two input fields: 'Customer Account Number*' and 'Invoice Number*'. Below these fields, there is a 'Clear' link and an 'ADD ACCOUNT' button, which is highlighted with a yellow border.

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.

OTIS

420507

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

LOG-OUT

MENU

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: \$24,751.95

Invoice Number	Document Type	Invoice Date	Days Past Due	Due Date	Total Amount	Open Amount		Payment Amount	
100401215435	Maintenance Invoice	6/19/2023	594	7/19/2023	\$7,939.29	\$7,939.29	<input type="checkbox"/>		Print
100401018857	Maintenance Invoice	12/19/2022	776	1/18/2023	\$7,765.89	\$772.61	<input type="checkbox"/>		Print
100400920899	Maintenance Invoice	9/12/2022	874	10/12/2022	\$7,765.89	\$126.79	<input checked="" type="checkbox"/>	126.79	Print
100400723351	Maintenance Invoice	3/14/2022	1086	3/14/2022	\$7,362.36	\$369.08	<input type="checkbox"/>		Print
100400115784	Maintenance Invoice	9/9/2020	1637	9/9/2020	\$10,191.12	\$10,191.12	<input type="checkbox"/>		Print
100400023959	Maintenance Invoice	6/15/2020	1723	6/15/2020	\$5,353.06	\$5,353.06	<input type="checkbox"/>		Print

Total record found: 6. Displaying record 1 to 6.

How to Download a copy of your invoice

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



CUSTOMER NO.:

420507

DATE:

9/12/2022

INVOICE NO.:

100400920899

PO NO.:

4501953305

Joel Y, Ledbetter Revenue Bldg

Net 30 Days

PLEASE PAY PROMPTLY

Service Contract

INVOICE

Page 1 of 1

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

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.

OTIS

420507

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

LOG OUT

View Open Invoices

Exact Search

Invoice Number:

Invoice Date:

Document Type:

-All Types-

MENU

OPEN INVOICE & PAYMENT

UPDATE BILLING PREFERENCES

PAYMENT 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 Invoic

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

OTIS

420507

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

LOG OUT

MENU ▼

Payment Profile	Payment On	Invoices To Pay	Contract	Customer Number	
Mastercard ending in 5295	1	All Invoices		569920	DELETE
ECP ending in 6667	1	Only Maintenance Invoices	10239	331083	DELETE

<< < > >> Total records found: 2. Displaying record 1 to 2.

ADD NEW AUTOPAY ACCOUNT

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

Auto Payment - EASYCommerce

Please select which invoice types you would like to set up for recurring auto-payment

☐ Maintenance Invoices Only

☐ Non-Maintenance Invoices Only

☐ All Invoices on account

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

Auto Payment - EASYCommerce

Please select which invoice types you would like to set up for recurring auto-payment

☒ Maintenance Invoices Only
☐ Non-Maintenance Invoices Only
☐ All Invoices on account

Contracts:

☒ 96475

Would you like to process payment now on any open invoices? (Payment will be processed today and then scheduled going forward)

☒ I would like to pay invoices currently open on my account
☐ I do not want to pay any open invoices today

Please select invoices to be paid today

☐ Select All
☐ 100401215435 - \$7,939.29
☐ 100401018857 - \$772.61

Example – No Open Invoice

Auto Payment - EASYCommerce

Please select which invoice types you would like to set up for recurring auto-payment

☒ Maintenance Invoices Only
☐ Non-Maintenance Invoices Only
☐ All Invoices on account

Contracts:

☒ 96475

What day of the month would you like to set for your recurring payment?

1

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

Auto Payment - EASYCommerce

Please select which invoice types you would like to set up for recurring auto-payment

☐Maintenance Invoices Only

☒Non-Maintenance Invoices Only

☐All Invoices on account

Would you like to process payment now on any open invoices? (Payment will be procesed today and then scheduled going forward)

☒I would like to pay invoices currently open on my account

☐I do not want to pay any open invoices today

Please select invoices to be paid today

☐Select All

☐100401215435 - \$7,939.29

☐100401018857 - \$772.61

Example – All Invoices on account

Auto Payment - EASYCommerce

Please select which invoice types you would like to set up for recurring auto-payment

☐Maintenance Invoices Only

☐Non-Maintenance Invoices Only

☒All Invoices on account

Would you like to process payment now on any open invoices? (Payment will be procesed today and then scheduled going forward)

☒I would like to pay invoices currently open on my account

☐I do not want to pay any open invoices today

Please select invoices to be paid today

☐Select All

☐100401215435 - \$7,939.29

☐100401018857 - \$772.61

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.

Auto Payment - EASYCommerce

What day of the month would you like to set for your recurring payment?

1

Please select payment profile for your recurring payment (*2.8% surcharge will be applied to each credit card payment)

Visa ending in 1111 (Credit Card)

Referred By

☐Sales Representative

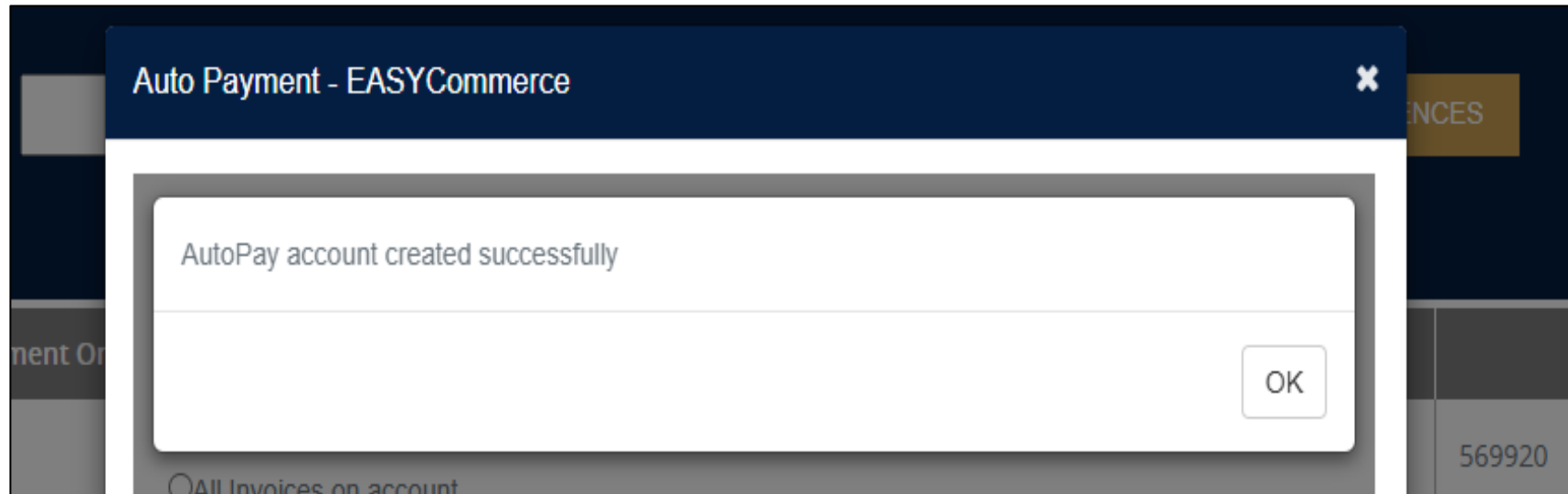
☐Accounts Receivable Specialist

☐Website

☒Other

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.

OTIS

420507

CHANGE CUSTOMER NUMBER

UPDATE BILLING PREFERENCES

MENU ▼

VIEW OPEN INVOICES

EXACT SEARCH

INVOICE NUMBER:

INVOICE DATE:

DOCUMENT TYPE:

-All Types-

OPEN INVOICE & PAYMENT

UPDATE BILLING PREFERENCES

PAYMENT RECEIPTS

MANAGE PAYMENT PROFILES

ADD NEW CUSTOMER NUMBER

CHANGE PASSWORD

CONTACT FORM

AUTOPAY ACCOUNTS

DATE RANGE

INVOICE NUMBER RANGE

FROM DATE:

TO DATE:

INVOICE NUMBER FROM:

INVOICE NUMBER TO:

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)

OTIS

Billing Preferences

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

To request invoice copies or update your accounts payable contact, [please click here.](#)

Submit

A blurred background image showing two people, a man and a woman, in a professional setting. The man is on the right, wearing a suit and tie, and the woman is on the left, wearing a dark top. They appear to be in a meeting or discussion. The image is overlaid with a dark blue gradient.

OTIS