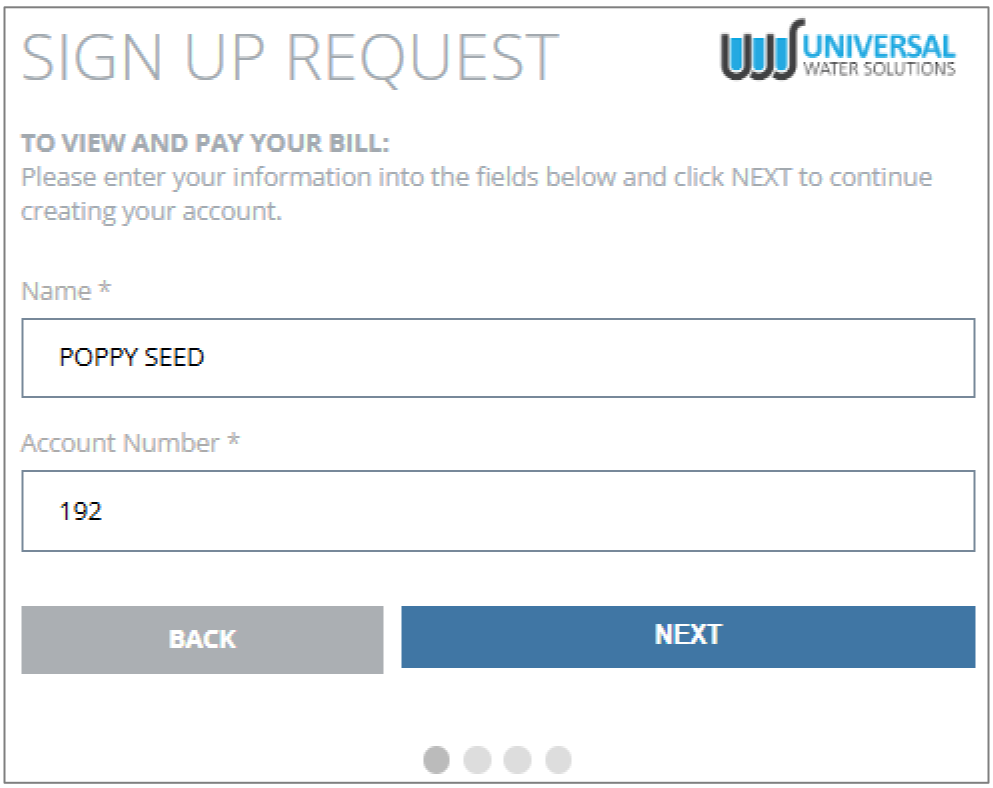
INTUITY CUSTOMER PORTAL

The customer may register or make a one-time payment only if their invoice has been uploaded to Intuity from El Dorado. The web address they use to sign up MUST have the Intuity company portal name extension in the web address (URL). Example: "**https://pay.waterbill.com/login-[company]**", notice the "login-[company]" extension. If the customer wishes to register, they must click the REGISTER NOW at bottom of the Intuity company logon page and fill out the brief SIGN UP REQUEST form then click submit. They must check their email, click the ACTIVATE link/button in order to complete the registration process. All fields are required, except a mobile phone number, in order to create a customer portal logon.

REGISTER NOW option

PAGE 1 – Account Holder Name and Account #

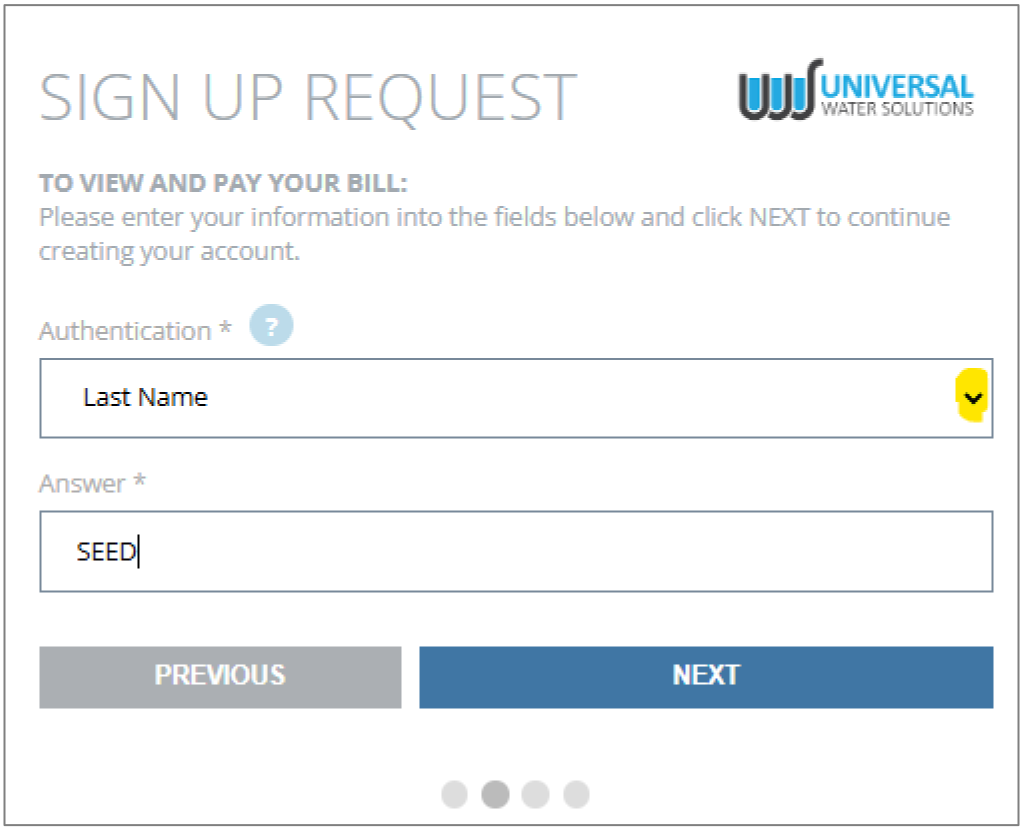


PAGE 2 – Authentication

They are able to authenticate by 'Last Name', 'Billing Street Name' or a PIN (Personal Identification Number) that can be found in an unregistered customer's bill ready notification email. It's located toward the bottom of the bill ready notice. The system will default to verify with last name.

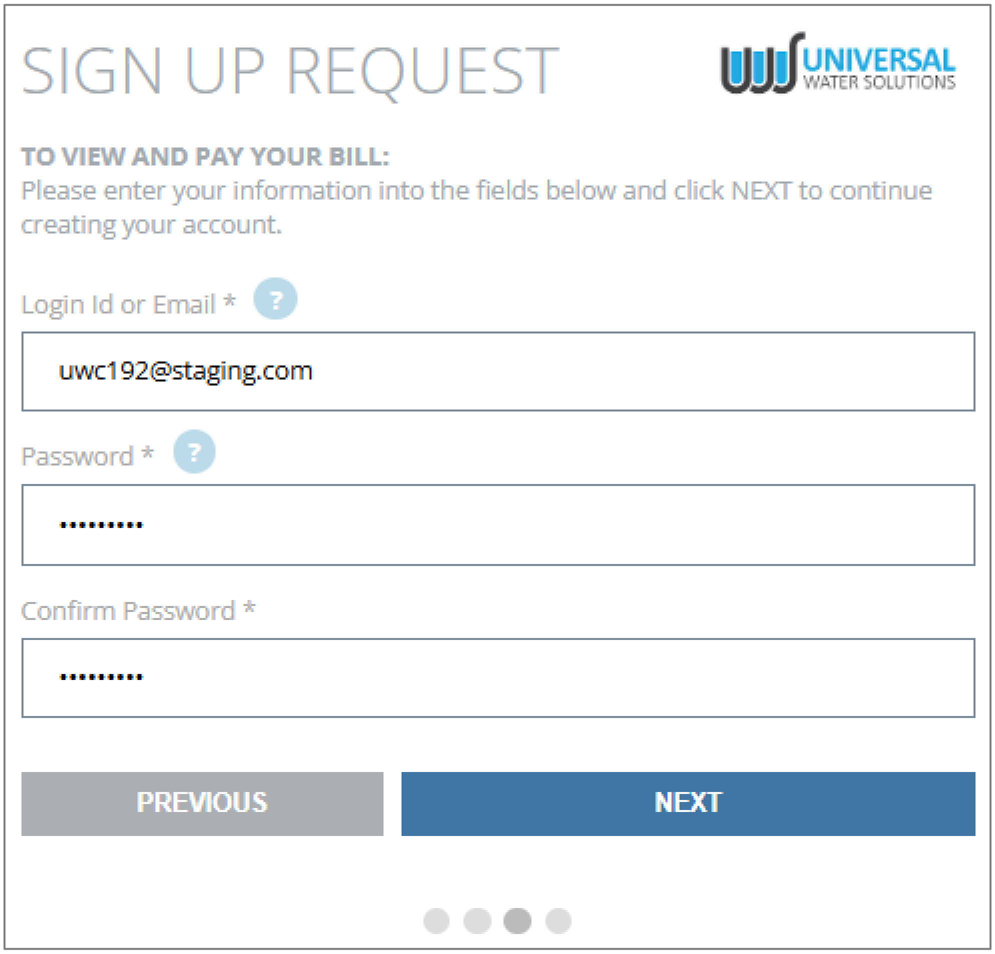
When signing up for a new account, at the prompt please supply the PIN: 2261

This is to ensure the customer entered the correct account number.



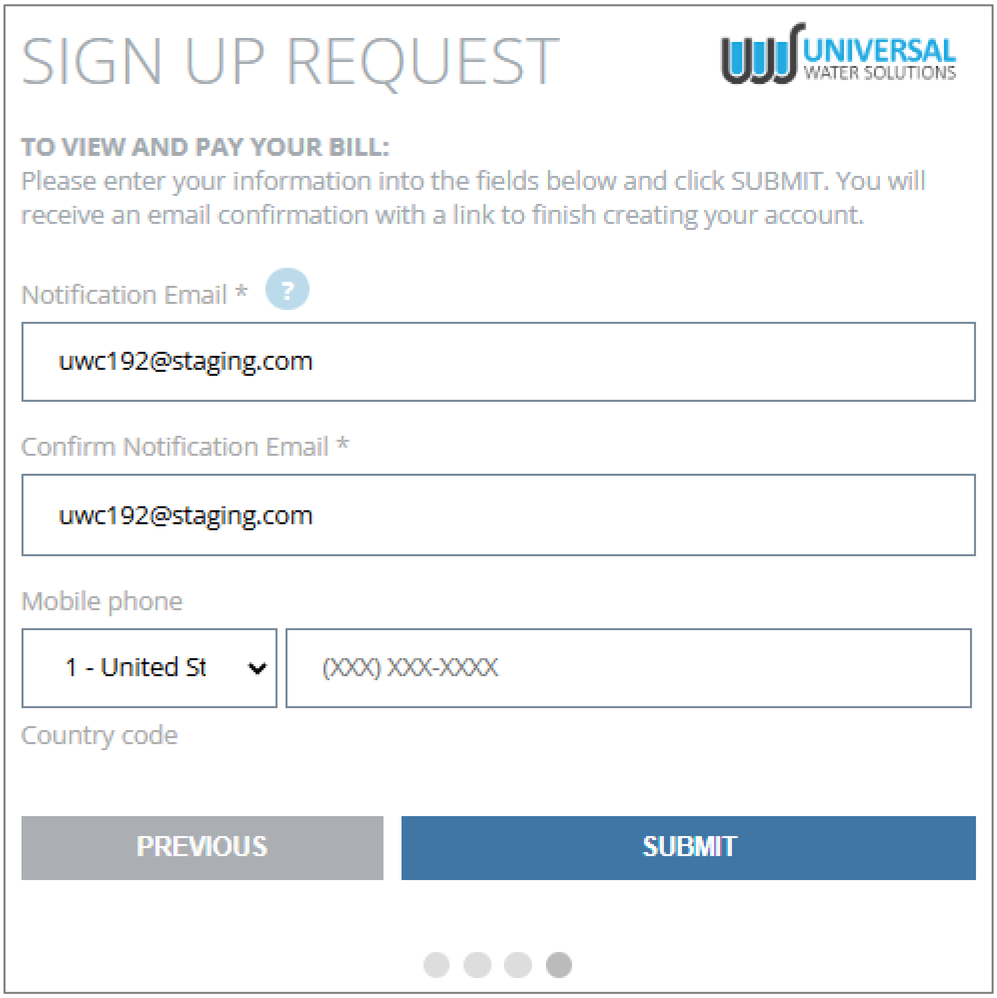
PAGE 3 – Portal Login Information

The customer must enter a login username or they may use their email address as their portal logon name.

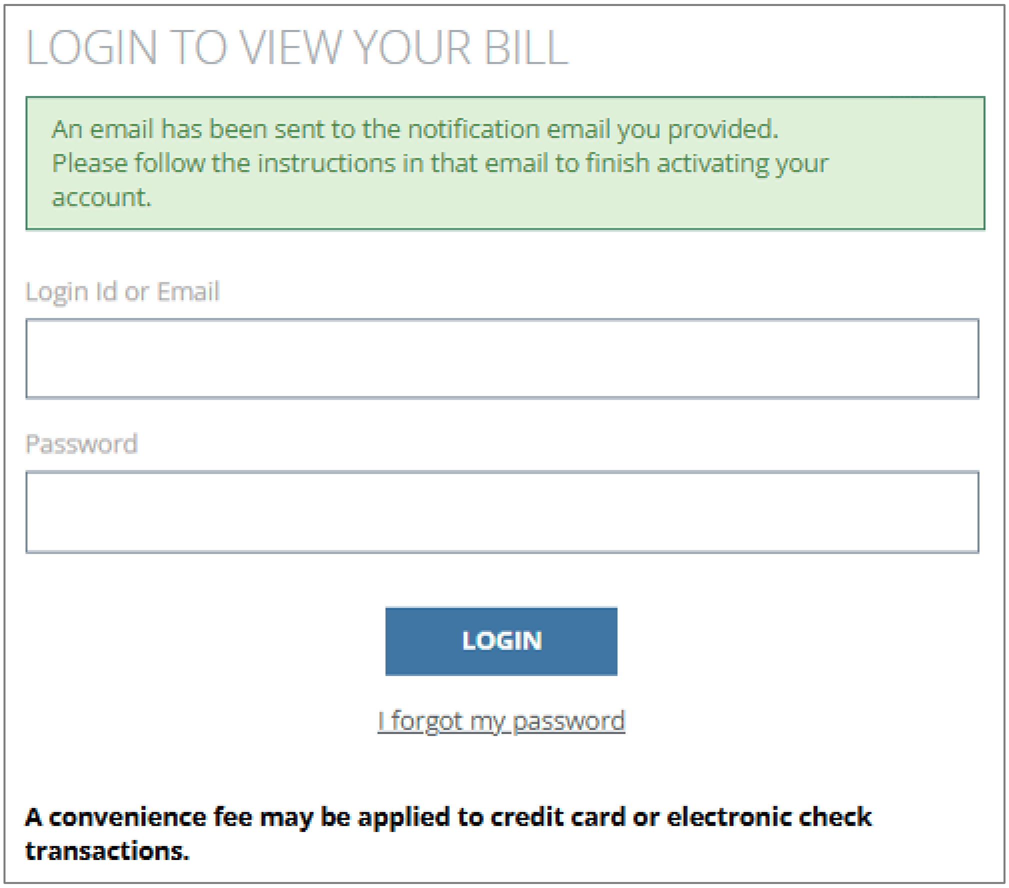


PAGE 4 – Notification Email Address and Mobile Phone Number

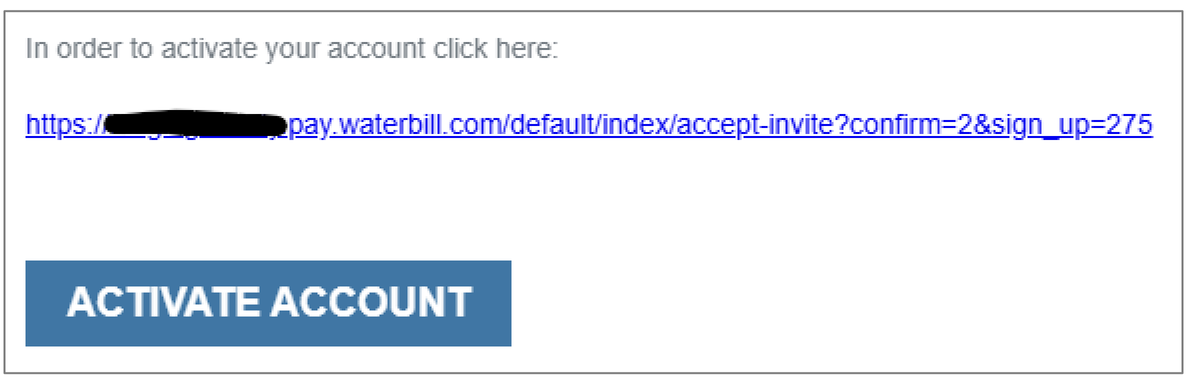
Mobile phone number is optional. They must enter a notification email address and will need to access this after completing the registration process to activate their customer portal.



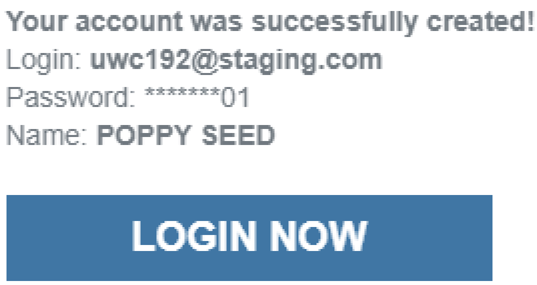
After submitting the Sign-Up Request form, an email is sent to the customer's notification email address they just provided.



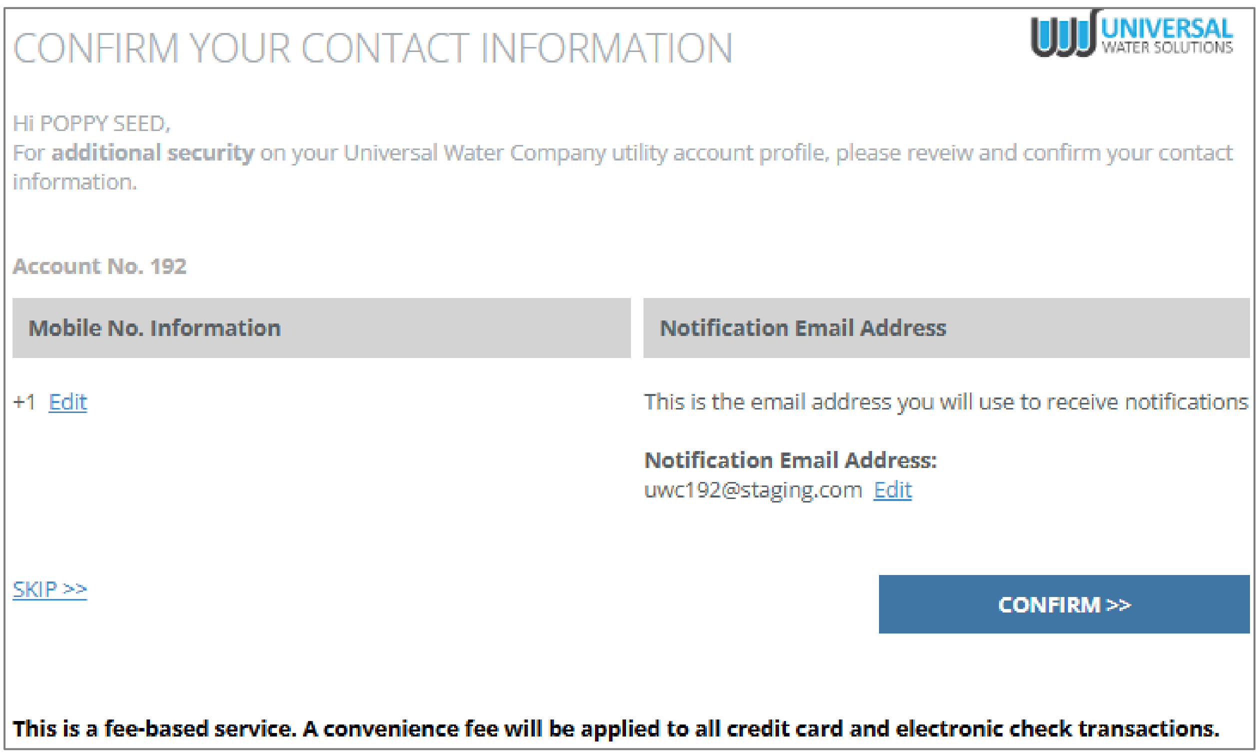
They will need to open their email and click the link to activate their account.



Upon activation, they will receive a second email confirming their account has been successfully created:



Once activated, they may log into their account. Once logged in, a CONFIRM YOUR CONTACT INFORMATION page is displayed. Selecting CONFIRM>> button will acknowledge the information and will not reappear until it hits the next confirmation frequency setting. Biller has access to this setting and the default is usually 120 days.

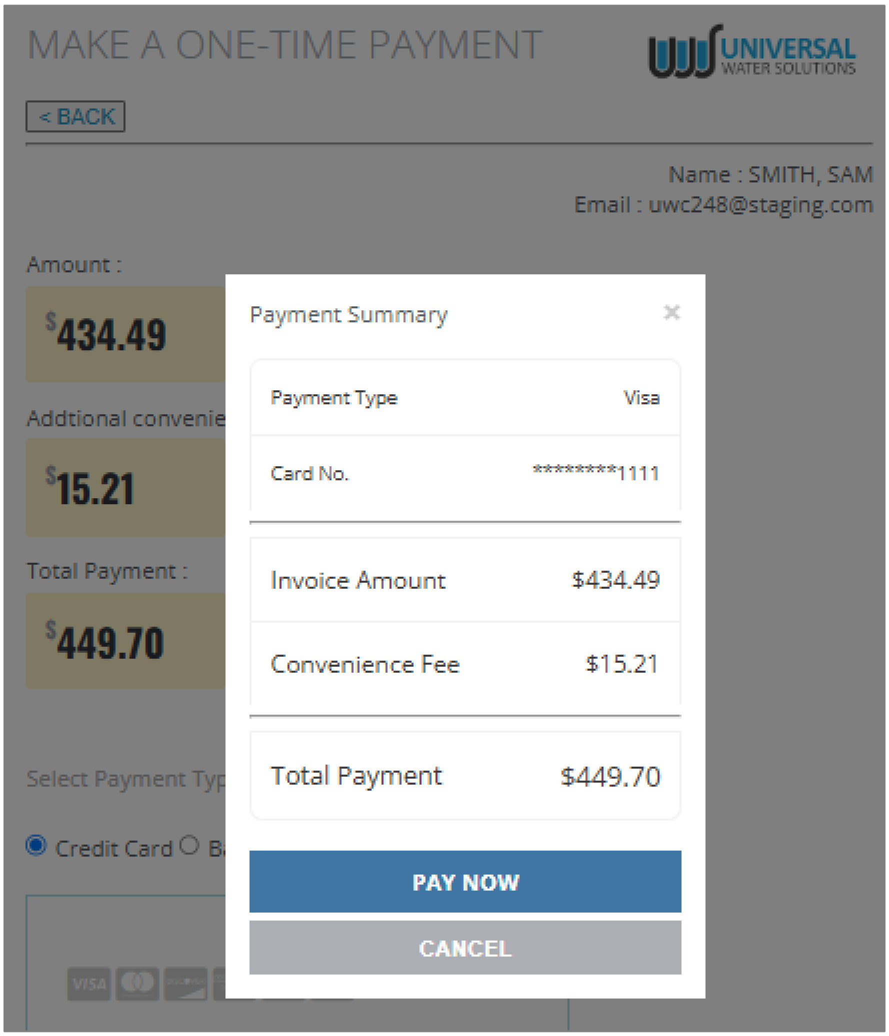


PAY NOW option

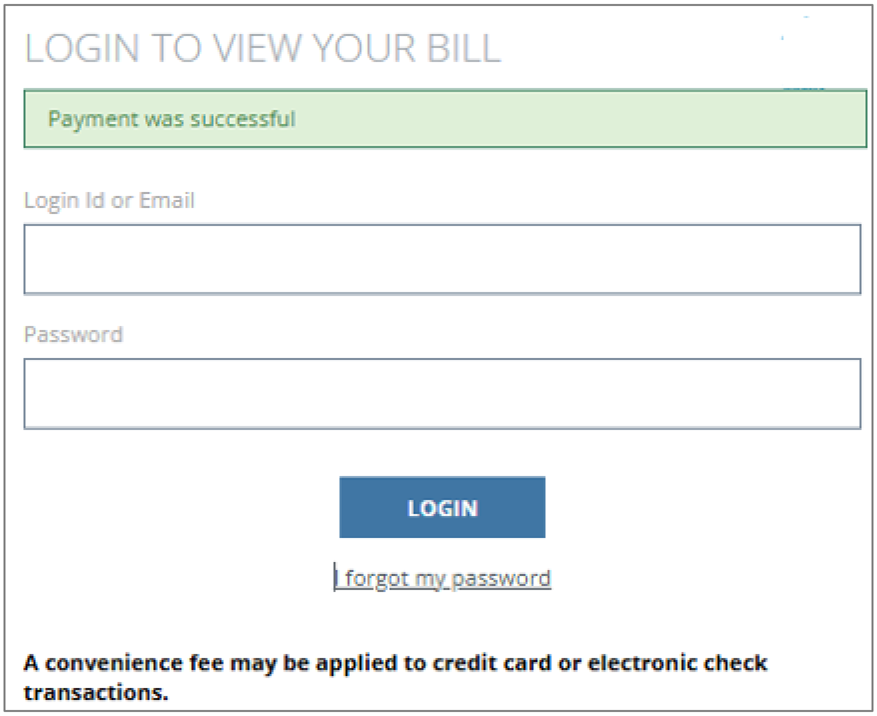
If the customer does not want to register but would like to make a payment as a guest, they will need to enter their full account number and the total, original balance due on their current period bill. Once Intuity retrieves the customer account information, <u>the payer must enter a valid email address to proceed with making a guest payment</u>.

Partial payment and Overpayment payment options are dependent on your Intuity portal setup options, which was part of the setup questionnaire provided to the biller by their Creative Technologies onboarding specialist.

Select ENTER PAYMENT METHOD.

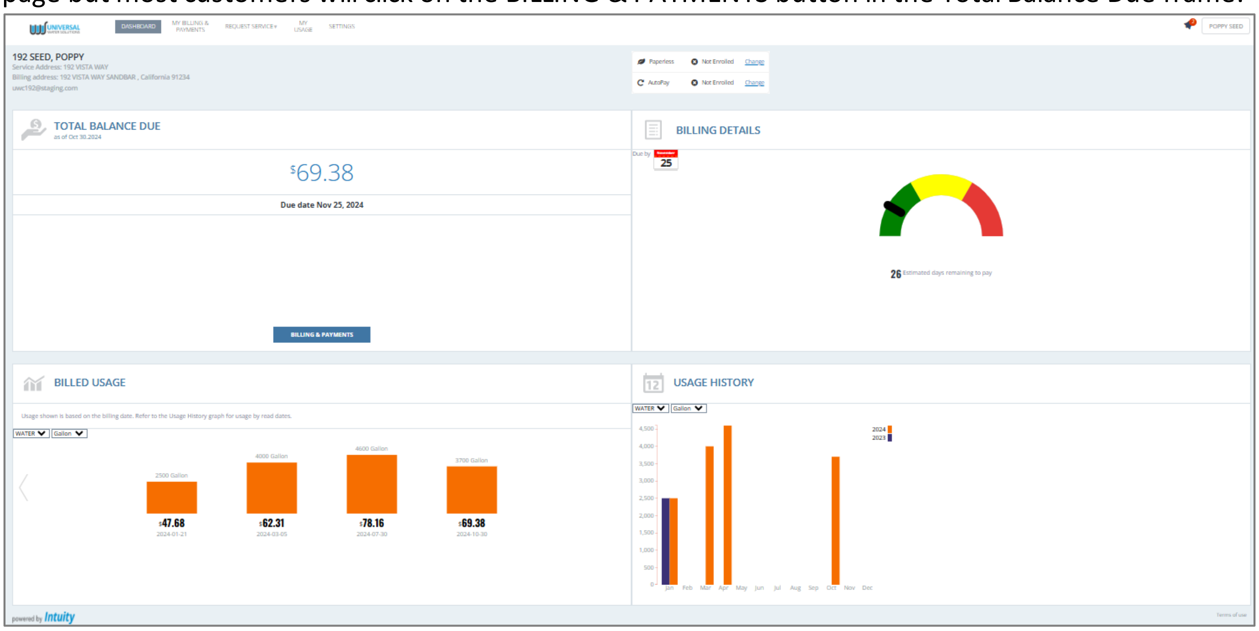


Click PAY NOW to process the one-time payment. Next a green banner is displayed indicating the payment status. The payer will receive a payment confirmation email.



Customer Portal

The Intuity DASHBOARD is displayed upon the customer logging in. Links are provided at the top of the page but most customers will click on the BILLING & PAYMENTS button in the Total Balance Due frame.



Making a Payment

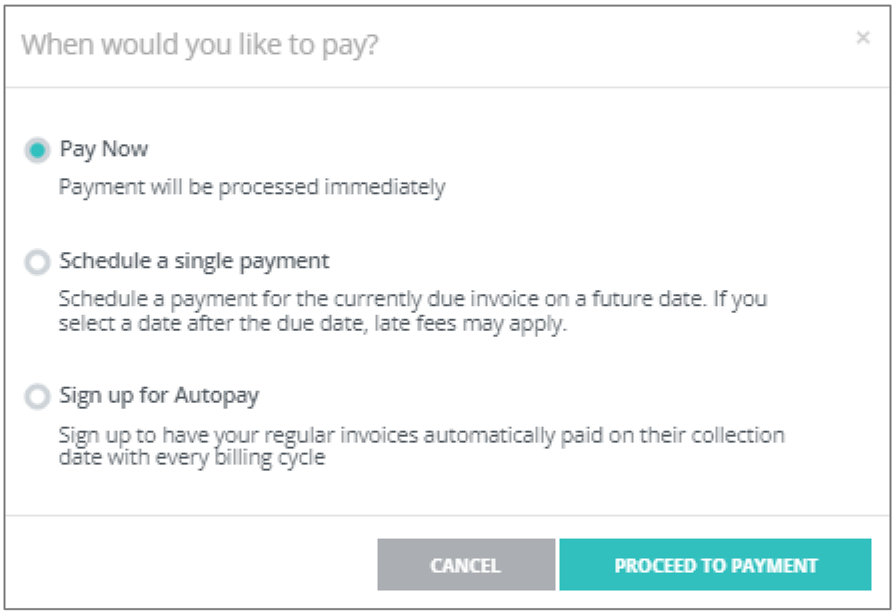
A registered customer has more payment options. Your company decides whether to allow credit card and ach (electronic bank check) when onboarding with our online payment processing company. They also have the option whether or not to offer autopay, where the full invoiced amount is drafted from the customer's bank on the customer's portal due date.

This guide assumes that customer may pay using a credit card or bank account. It also assumes that autopay is enabled.

The following describes each payment option separately.

To Access the Payment Options window:

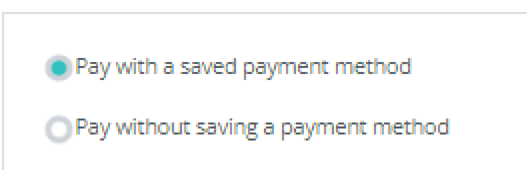
1. From DASHBOARD select BILLING & PAYMENTS button.
2. Select MAKE A PAYMENT button.



PAY NOW option

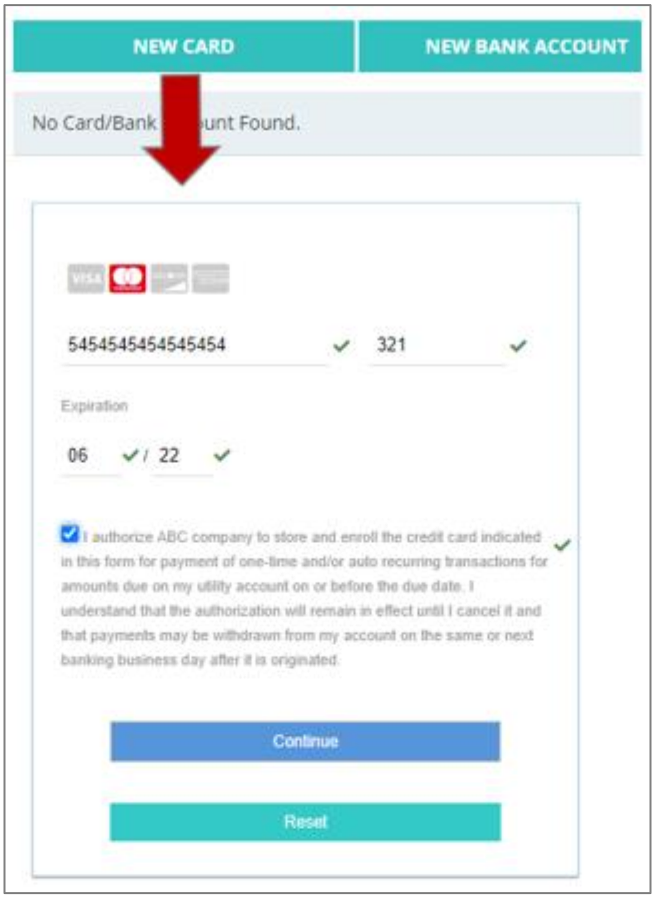
Once the customer is on the PAYMENT DETAILS page, they will have the option to "Pay with a saved method" or "Pay without saving a payment method".

1. Select the **Pay Now** option, then **PROCEED TO PAYMENT** button.
2. Decide if you want to "**Pay with a saved payment method**" or "**Pay without saving a payment method**":



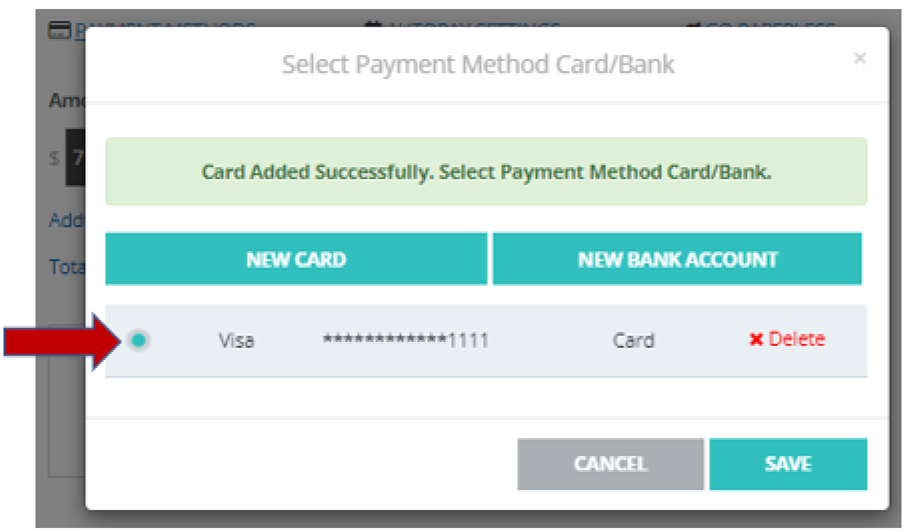
3. The PAYMENT DETAILS page is displayed. Click the PAYMENT METHODS link at top.

4. Enter credit card information, acknowledge the enrollment clause, then click **Continue**.

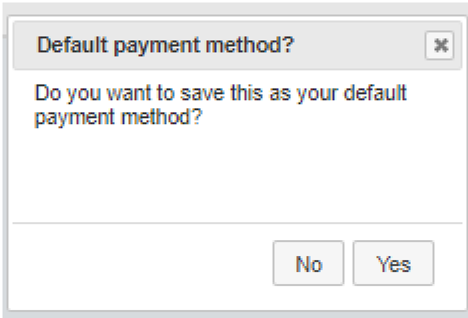


   a. A message will appear indicating the card was successfully added.

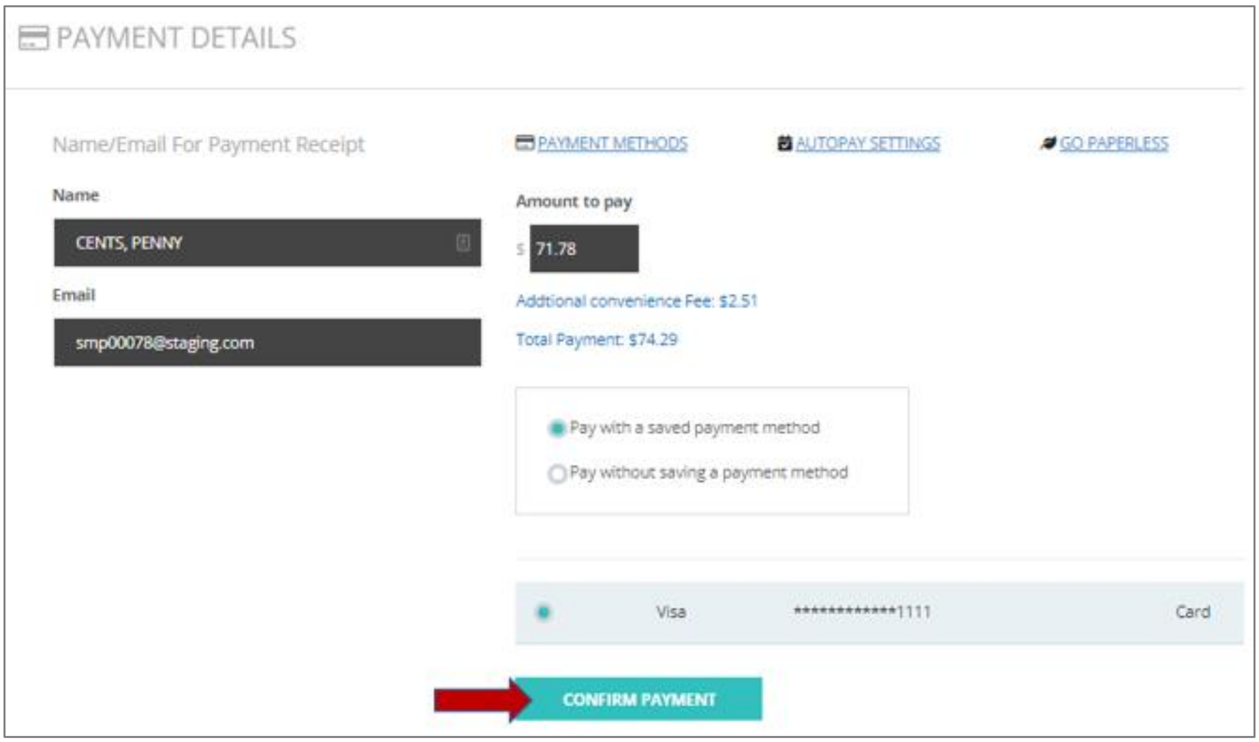
5. Ensure you select the appropriate payment method, even if it's the only available. Click SAVE.



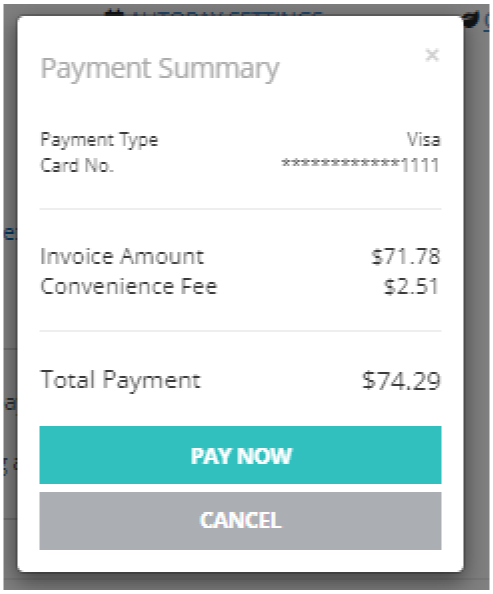
6. A pop-up message appears asking if you want to save this as your default payment method. Click Yes, or No.



7. To process the payment using the selected payment option, click **CONFIRM PAYMENT button**.

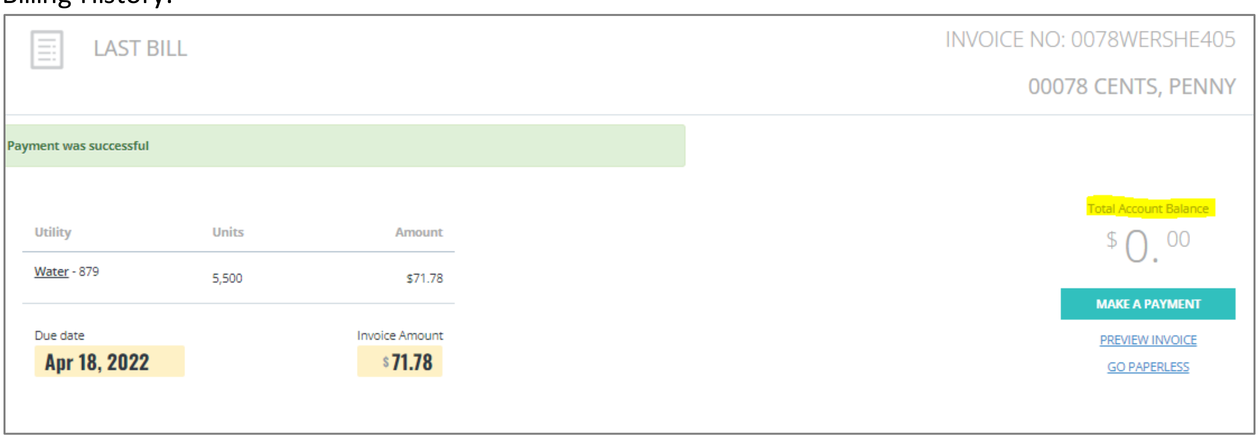


8. A **Payment Summary** pop-up appears with a PAY NOW button. Click the PAY NOW button, only once.

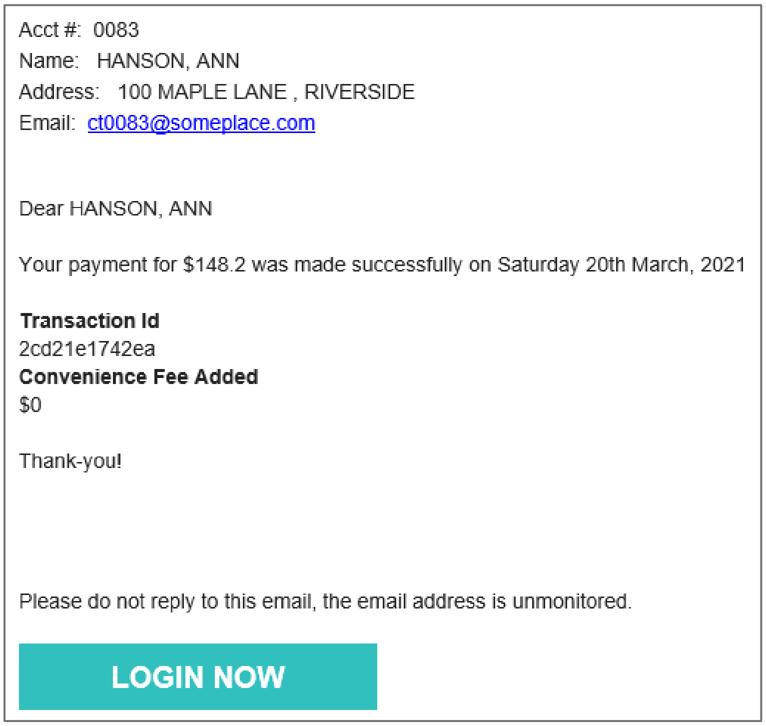


9. A message will appear confirming your payment. Click **OK**.
Customers need to be patient, depending on their internet speed, some may take longer to process.

10. After the payment processes, the customer will return to the LAST BILL page and the Total Account Balance will be immediately updated. They may also scroll down the page to review Payment & Billing History.



11. A payment receipt will be emailed to the payee.



Acct #: 0083
Name: HANSON, ANN
Address: 100 MAPLE LANE , RIVERSIDE
Email: ct0083@someplace.com

Dear HANSON, ANN

Your payment for $148.2 was made successfully on Saturday 20th March, 2021

Transaction Id
2cd21e1742ea
Convenience Fee Added
$0

Thank-you!

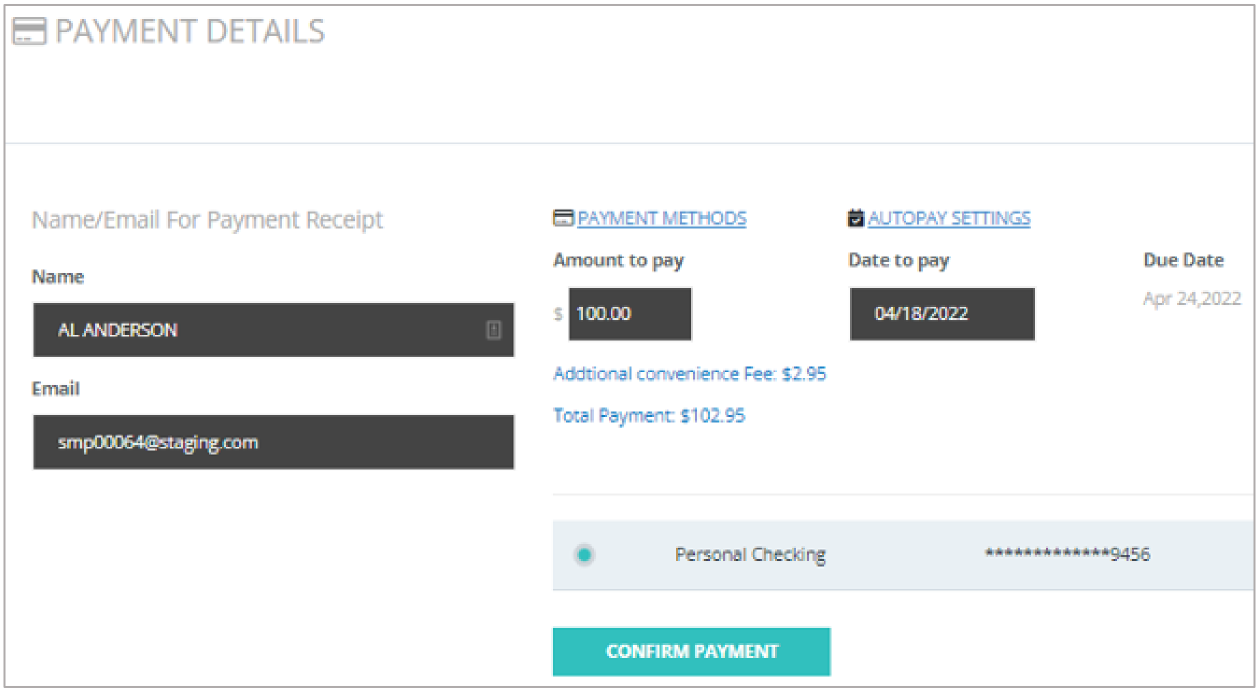
Please do not reply to this email, the email address is unmonitored.

LOGIN NOW

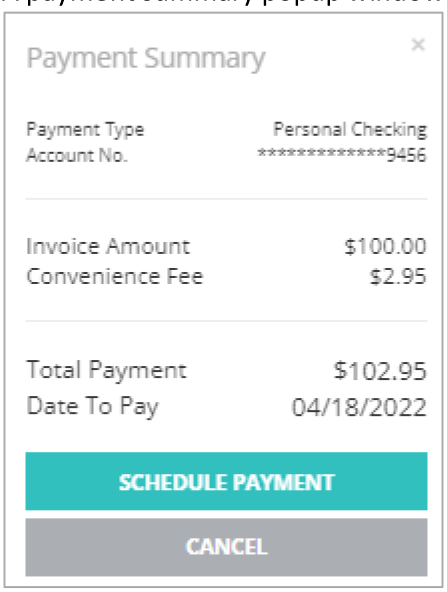
SCHEDULE A SINGLE PAYMENT option

Allows customer to schedule a future payment for the current invoice. They may opt to pay the full amount due or a partial payment. Once the customer is on the PAYMENT DETAILS page, they will have the option to "Pay with a saved method" or "Pay without saving a payment method".

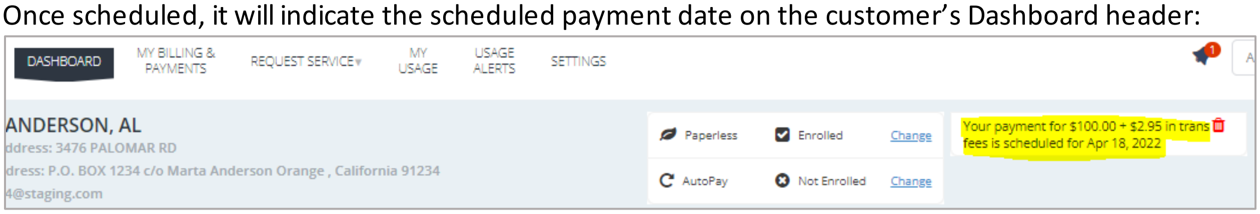
1. Select the **Schedule a single payment** option, then **PROCEED TO PAYMENT** button.
2. On the PAYMENT DETAILS screen, they may enter an amount to pay other than the full balance due by simply keying in the amount in the **Amount to pay** field.
3. Click the **Date to pay** box to select a future payment date.
4. Payee must have a payment method selected in order to complete the scheduling process, if not they must click the PAYMENT METHODS link.
5. Once the payment method is selected, amount to pay is correct and a future date to pay is selected, click the CONFIRM PAYMENT button.



6. A payment summary popup window appears. Select SCHEDULE PAYMENT button.



Once scheduled, it will indicate the scheduled payment date on the customer's Dashboard header:

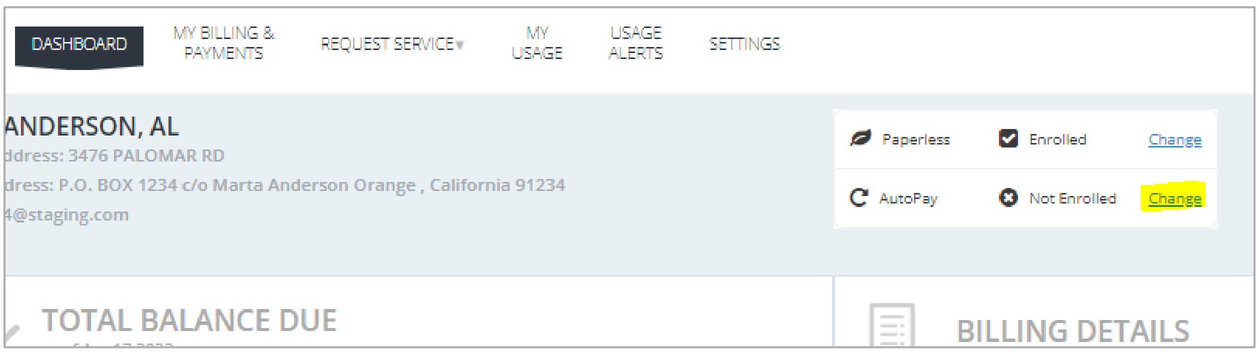


SIGN UP FOR AUTOPAY option

Customers may set up an automatic payment plan to deduct payments from their preferred payment source. They may use either a credit card or bank account. The utility statement's autopay collection date will be reflected on the customer's online Intuity portal. The TOTAL BALANCE DUE displayed on the customer portal dashboard is the amount that will be withdrawn from their selected payment source. It will draft on the due date displayed on the customer's portal. The customer may NOT specify the amount to be withdrawn, such as a partial payment of the total amount owed. Please encourage your customers to sign up at least 24 hours in advance of their auto pay date to ensure their balance gets drafted. The auto pay is scheduled to kick off at 3 AM CT on the customer's portal due date.

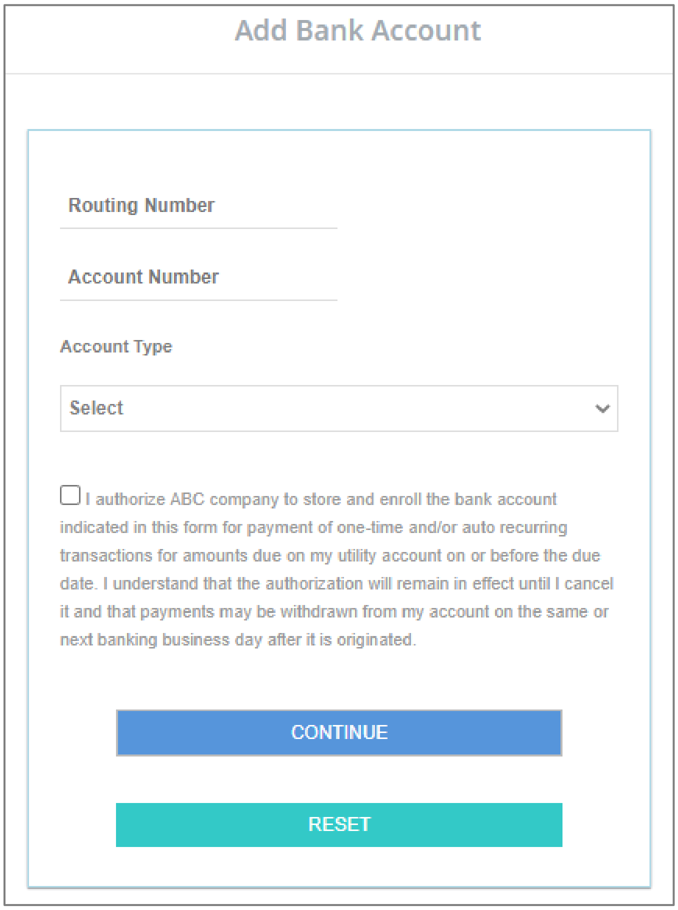
Setting up Auto Pay:

1. Upon logging in, From the DASHBOARD section, click the Autopay's blue **Change** link, located on the customer's banner:

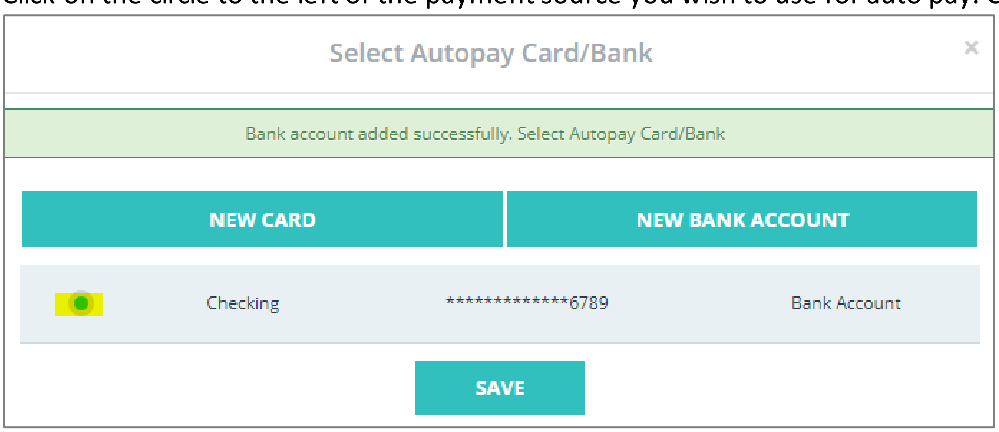


2. Click Select Payment Method link.
3. If no payment source is available, add a payment source by selecting either NEW CARD or NEW BANK ACCOUNT. This example uses a bank account to draft from. Enter the appropriate information

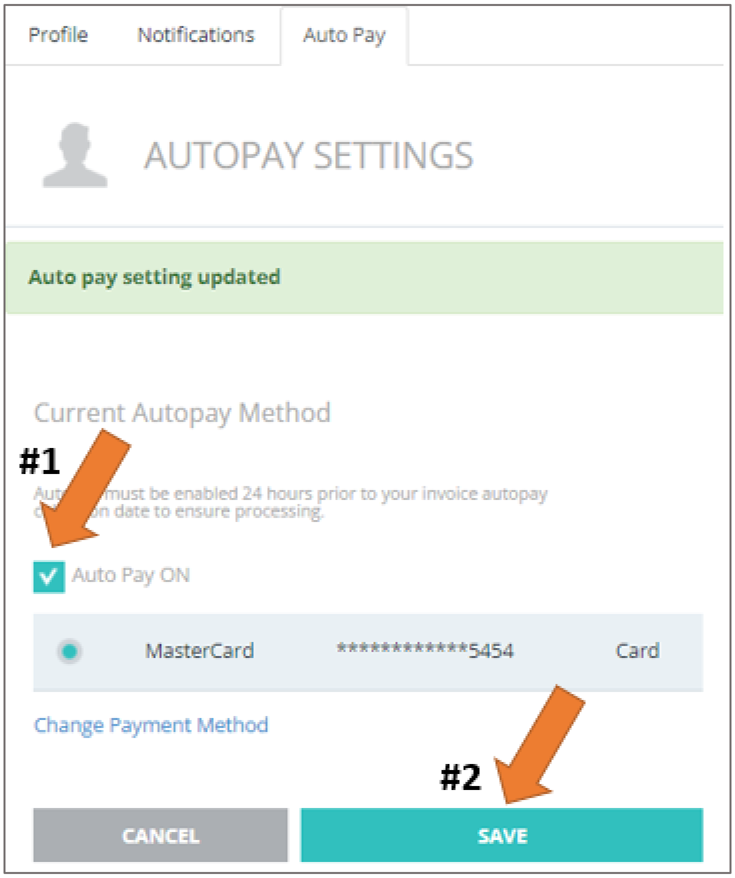
and click the authorization box to enroll in payment process then select the CONTINUE button.



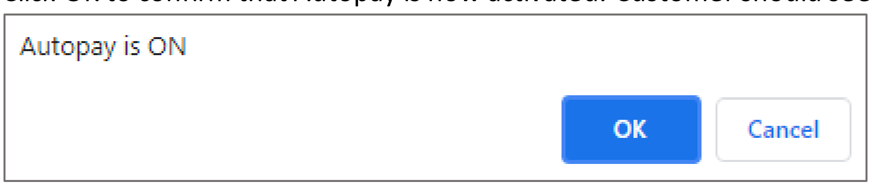
4. Click on the circle to the left of the payment source you wish to use for auto pay. Click SAVE.



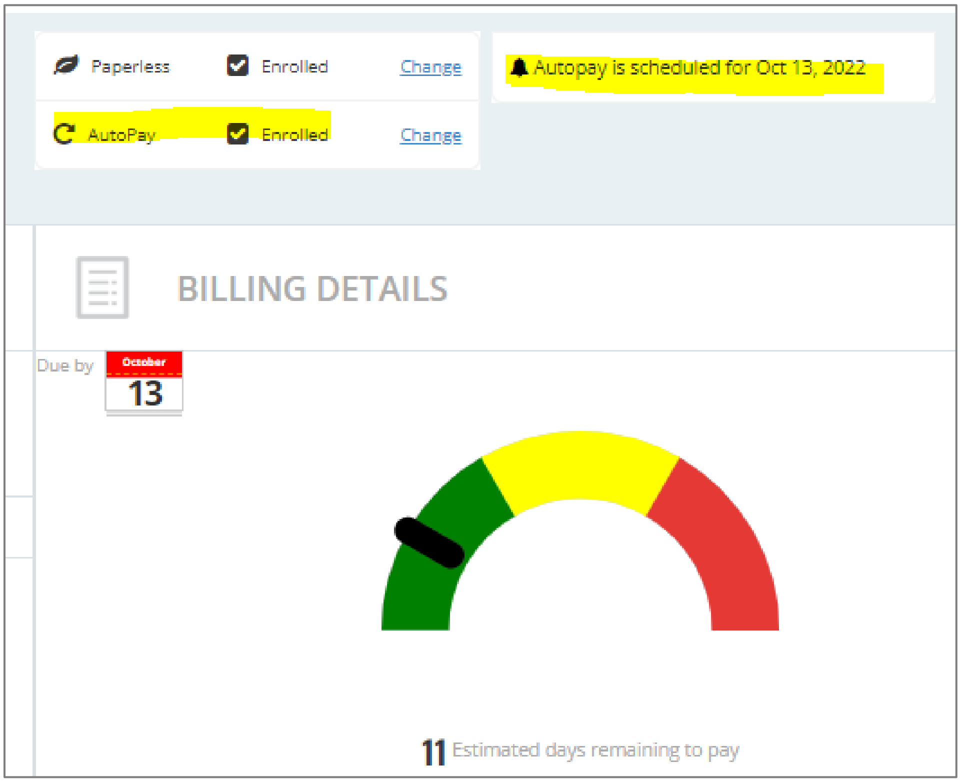
5. Next, activate the Auto Pay ON by putting a check mark in the "Auto Pay ON" check box.
THIS MUST BE DONE IN ORDER TO ACTIVATE AUTO PAY AND CLICK THE SAVE button.



Click OK to confirm that Autopay is now activated. Customer should see this message:



6. The customer may return to the Dashboard. If the invoice due date is in the future, a message appears on the Dashboard's status banner indicating "Autopay is scheduled for [due date]". If they signed up AFTER the current bill's due date and have an outstanding balance due, it will still show the message "Autopay is scheduled for [due date]".

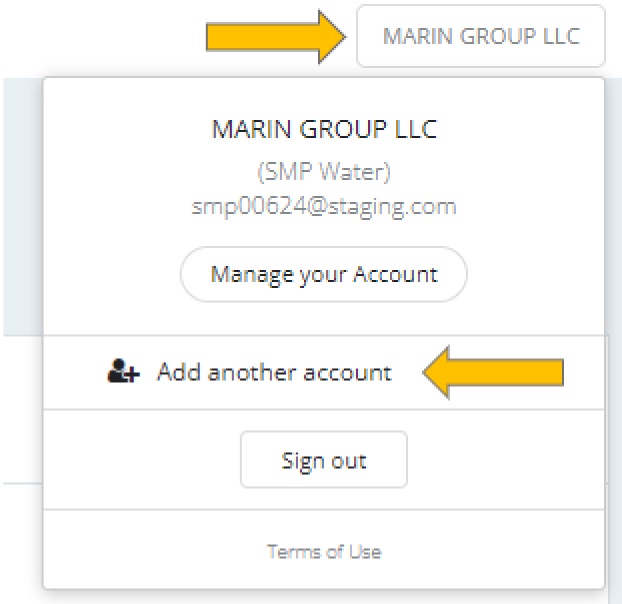


Ability for a Customer to Link Accounts

Some customers are responsible for more than one utility account. They have the ability to add a new account to their list and switch between account and remove accounts. This will enable the customer to just logon one time to the portal. Using their account name menu option to the right, they may easily add another account. The invoice from the other account must be uploaded to Intuity in order for the customer to add the account.

To Link another account

1. Select the **Account Name** menu, located on the far right of the screen.



2. Select Add another account option.
3. Add the account number. To ensure the correct account was entered, the customer is required to verify this by either entering the PIN they received from an email notification, enter their last name, or billing street name.

When a payment source is stored, it may be used for the linked accounts as well.