



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 your INTUITY company portal name extension in the web address (URL). Example: “https://pay.waterbill.com/login-universal-utility”, notice the “login-[company]” extension. If the customer wishes to register, they must click the **REGISTER NOW** button at bottom of your 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 in order to create a customer portal logon.

REGISTER NOW option

PAGE 1 – Account Holder Name and Account

SIGN UP REQUEST

TO VIEW AND PAY YOUR BILL:

Please enter your information into the fields below and click **NEXT** to continue creating your account.

Name *

Daisy Flower

Account Number *

11260

BACK

NEXT



PAGE 2 – Authentication

A personal identification number (PIN) can be found in an unregistered customer’s bill ready notification. It’s located toward the bottom of the bill ready notice, example:

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

If the customer did not receive a bill ready notification or doesn’t know their PIN, they may select Last Name or Billing Street Name instead. This is to ensure the customer entered the correct account

number.

SIGN UP REQUEST

TO VIEW AND PAY YOUR BILL:

Please enter your information into the fields below and click NEXT to continue creating your account.

Authentication * 

Last Name 

Last Name

Billing Street Name

PIN

PREVIOUS NEXT



PAGE 3 – Portal Login Information

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

SIGN UP REQUEST

TO VIEW AND PAY YOUR BILL:

Please enter your information into the fields below and click NEXT to continue creating your account.

Login Id or Email * 

dflower

Password *

Confirm Password *

PREVIOUS NEXT



PAGE 4 – Notification Email Address and Mobile Phone Number

If no mobile phone number is available, then the customer may leave that blank.

SIGN UP REQUEST

TO VIEW AND PAY YOUR BILL:

Please enter your information into the fields below and click SUBMIT. You will receive an email confirmation with a link to finish creating your account.

Notification Email * 

smw11260@staging.com

Confirm Notification Email *

smw11260@staging.com

Mobile phone

1  949-200-8100

PREVIOUS

SUBMIT



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

LOGIN TO VIEW OR PAY YOUR BILL



An email has been sent to the notification email you provided. Please follow the instructions in that email to finish activating your account.

Login Id or Email

Password

LOGIN

[I forgot my password](#)

[I forgot my login](#)

This is a fee-based service. A convenience fee will be applied to all credit card and electronic check transactions.

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

In order to activate your account click here:

<https://staging-web.pay.waterbill.com/default/index/confirm-signup>

ACTIVATE ACCOUNT

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

Your account was successfully created!

Login: **dflower**

Password: *******01**

Name: **Daisy Flower**

LOGIN NOW

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

Once activated, they may log into their account.

LOGIN TO VIEW OR PAY YOUR BILL 

Thank you for activating your account. You may now log in.

Login Id or Email

Password

LOGIN

[I forgot my password](#)

[I forgot my login](#)

This is a fee-based service. A convenience fee will be applied to all credit card and electronic check transactions.

MAKE A ONE-TIME PAYMENT option

If your customer does not want to register but would like to make a payment, they will need to enter their full account number and the total balance due on their current bill. They may only pay the full balance due, partial payment is not accepted. Once Intuity retrieves their account information, they must enter a valid email address to send the payment confirmation to.

MAKE A ONE-TIME PAYMENT

Account No.
00067

Invoice Amount
\$90.54

Name
DOLLAR, BILL

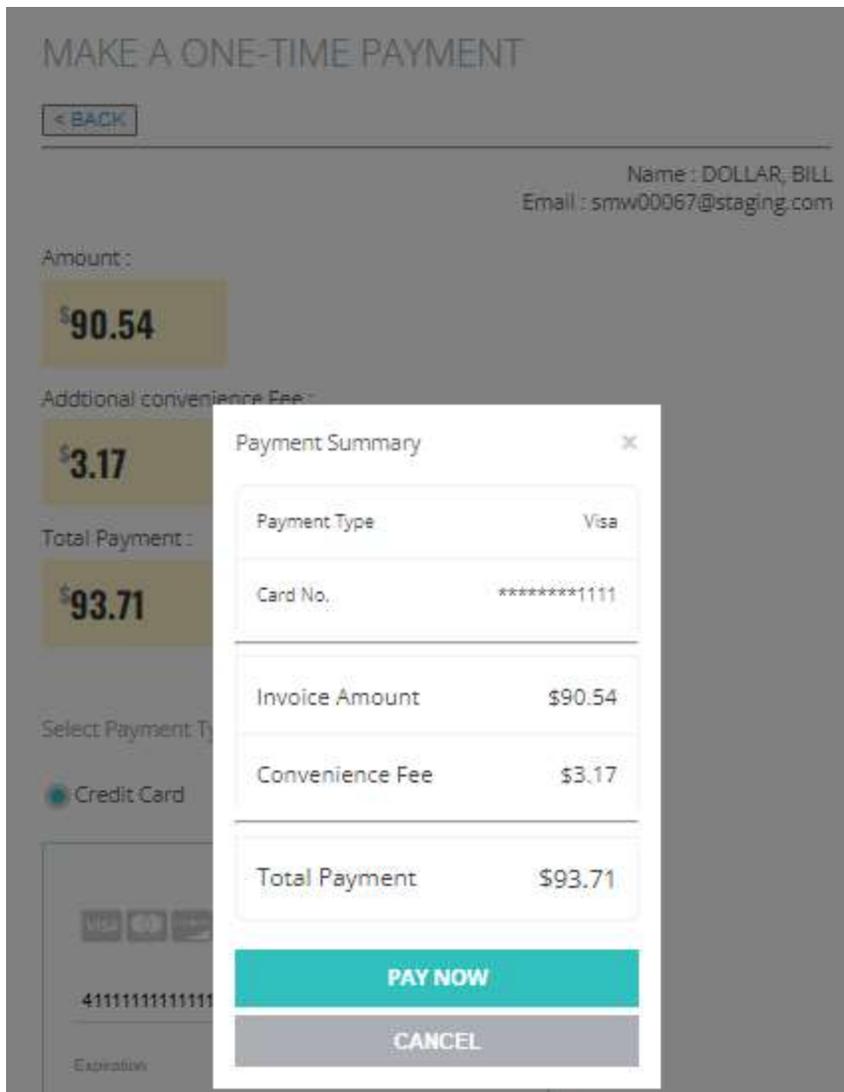
Email
smw00067@staging.com

Due Amount : 90.54 [PREVIEW INVOICE](#)

Amount To Pay
\$90.54

[BACK](#) [ENTER PAYMENT METHOD](#)

Select ENTER PAYMENT METHOD. This examples only allows credit card payment but your might offer credit card and bank account, or just the latter:



They will need to click PAY NOW to process the one-time payment. They will be immediately logged of the payment page without saving any payment method information.

Customer Portal

The DASHBOARD page is the landing page. The customer may scroll down to see previous invoices and any payments made since your utility company started using Intuity. They may use the links at the top to navigate to other pages, such as SETTINGS.

The dashboard displays the following information:

- Account Info:** 00078 CENTS, PENNY. Service Address: 2305 PALOMAR. Billing Address: 2000 PALMARR RD Orange, California 92664. Email: emp00078@intuity.com.
- Navigation:** DASHBOARD, MY BILLING & PAYMENTS, REQUEST SERVICE, MY USAGE, USAGE ALERTS, SETTINGS.
- Payment Options:** Paperless, AutoPay, No-Envelope, Post-Envelope.
- TOTAL BALANCE DUE:** \$71.78 as of Apr 17, 2022. Due date: Apr 18, 2022.
- BILLING DETAILS:** Due by April 18. A gauge chart shows the payment progress.
- BILLED USAGE:** Water and Gallon usage for the current billing date.
- USAGE HISTORY:** A bar chart comparing monthly usage for 2021 and 2022. Usage for 2022 is significantly higher than for 2021.
- PAYMENT & BILLING HISTORY:** A table with columns for Account #, Name, Transaction Type, Date, Amount, and Balance. A 'HIDE FILTER' button is present.

Making a Payment

Your organization decides whether the following at the time your Intuity portal is setup:

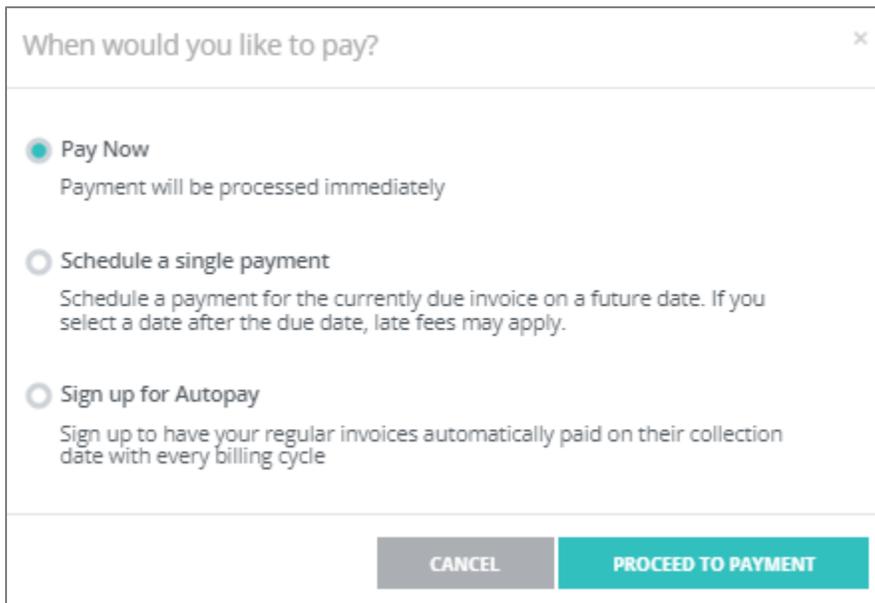
- Whether or not your customers may pay by credit card and/or bank account. Example, some organizations may only allow ACH (payment by bank account) and no credit card or vice versa.
- Whether or not your customers may enroll in Autopay.

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

Your customers may choose to Make the payment immediately, schedule a payment to be paid on a future date, or sign up for Autopay. If your portal does not allow for Autopay, your customers will have 2 options only and will not see the third option, "Sign up for Autopay". The following describes each process separately.

To Access the Payment Options window:

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



When would you like to pay?

Pay Now
Payment will be processed immediately

Schedule a single payment
Schedule a payment for the currently due invoice on a future date. If you select a date after the due date, late fees may apply.

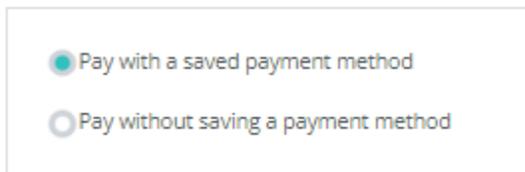
Sign up for Autopay
Sign up to have your regular invoices automatically paid on their collection date with every billing cycle

CANCEL PROCEED TO PAYMENT

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**":

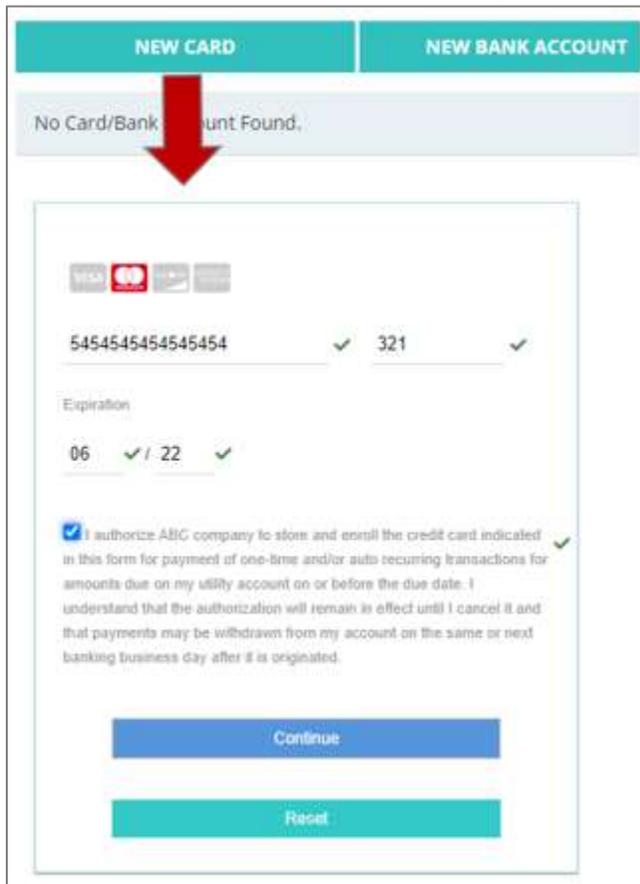


Pay with a saved payment method

Pay without saving a payment method

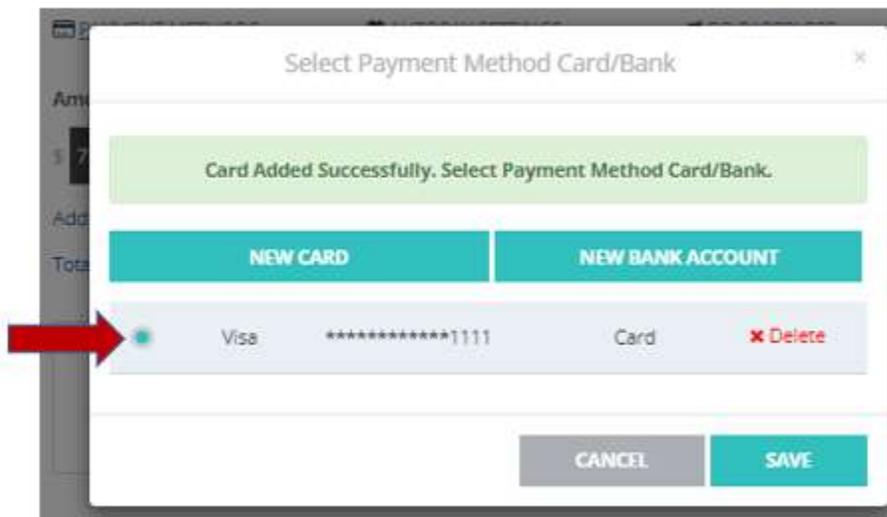
3. The PAYMENT DETAILS page is displayed. Click the PAYMENT METHODS link at top.

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



The screenshot shows a form titled "NEW CARD" with a sub-header "NEW BANK ACCOUNT". A red arrow points to a message: "No Card/Bank Account Found." Below this is a form for entering card details. It includes a Visa logo, a card number "5454545454545454" with a checkmark, a CVV "321" with a checkmark, and an expiration date "06 / 22" with checkmarks. Below the form is a checked checkbox and an authorization clause: "I authorize ABC company to store and enroll the credit card indicated in this form for payment of one-time and/or auto recurring transactions for amounts due on my utility account on or before the due date. I understand that the authorization will remain in effect until I cancel it and that payments may be withdrawn from my account on the same or next banking business day after it is originated." At the bottom are "Continue" and "Reset" buttons.

- 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**.



The screenshot shows a dialog box titled "Select Payment Method Card/Bank". A green message box at the top says "Card Added Successfully. Select Payment Method Card/Bank." Below this are two buttons: "NEW CARD" and "NEW BANK ACCOUNT". A red arrow points to a radio button next to a card entry: "Visa *****1111 Card" with a "Delete" button. At the bottom are "CANCEL" and "SAVE" buttons.

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

Default payment method? ✕

Do you want to save this as your default payment method?

No Yes

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

 **PAYMENT DETAILS**

Name/Email For Payment Receipt

[PAYMENT METHODS](#) [AUTOPAY SETTINGS](#) [GO PAPERLESS](#)

Name: CENTS, PENNY

Email: smp00078@staging.com

Amount to pay: \$ 71.78

Additional convenience Fee: \$2.51

Total Payment: \$74.29

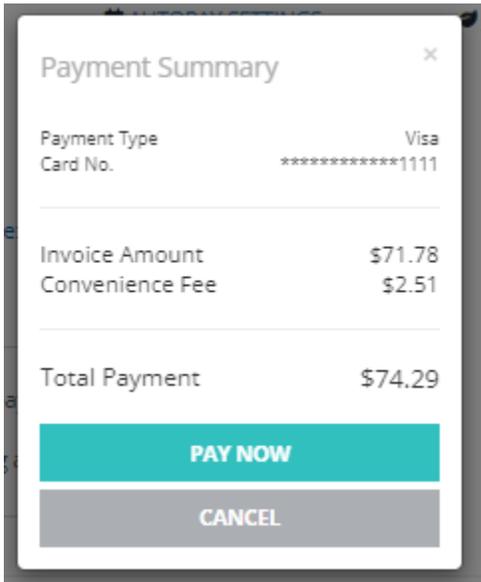
Pay with a saved payment method

Pay without saving a payment method

Visa *****1111 Card

 **CONFIRM PAYMENT**

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.

PAYMENT DETAILS

Name/Email For Payment Receipt

Name
AL ANDERSON

Email
smp00064@staging.com

PAYMENT METHODS

Amount to pay
\$ 100.00

Additional convenience Fee: \$2.95

Total Payment: \$102.95

AUTOPAY SETTINGS

Date to pay
04/18/2022

Due Date
Apr 24, 2022

Personal Checking *****9456

CONFIRM PAYMENT

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

Payment Summary ✕

Payment Type: Personal Checking
Account No.: *****9456

Invoice Amount: \$100.00
Convenience Fee: \$2.95

Total Payment: \$102.95
Date To Pay: 04/18/2022

SCHEDULE PAYMENT

CANCEL

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

DASHBOARD MY BILLING & PAYMENTS REQUEST SERVICE+ MY USAGE USAGE ALERTS SETTINGS

ANDERSON, AL
Address: 3476 PALCMAR RD
Address: P.O. BOX 1234 c/o Marta Anderson Orange, California 91334
al@staging.com

Paperless: Enrolled [Cancel](#)

AutoPay: Not Enrolled [Cancel](#)

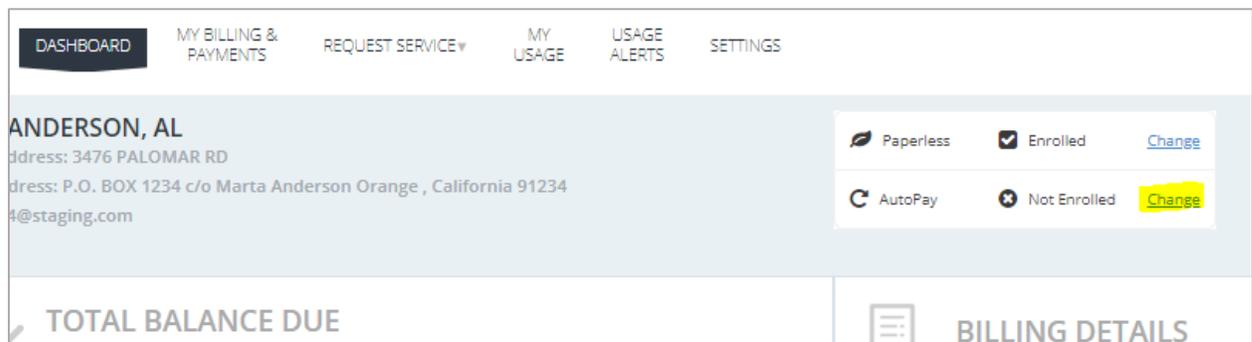
Your payment for \$100.00 + \$2.95 in trans fees is scheduled for Apr 18, 2022

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.

Add Bank Account

Routing Number _____

Account Number _____

Account Type
Select ▾

I authorize ABC company to store and enroll the bank account indicated in this form for payment of one-time and/or auto recurring transactions for amounts due on my utility account on or before the due date. I understand that the authorization will remain in effect until I cancel it and that payments may be withdrawn from my account on the same or next banking business day after it is originated.

CONTINUE

RESET

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

Select Autopay Card/Bank ×

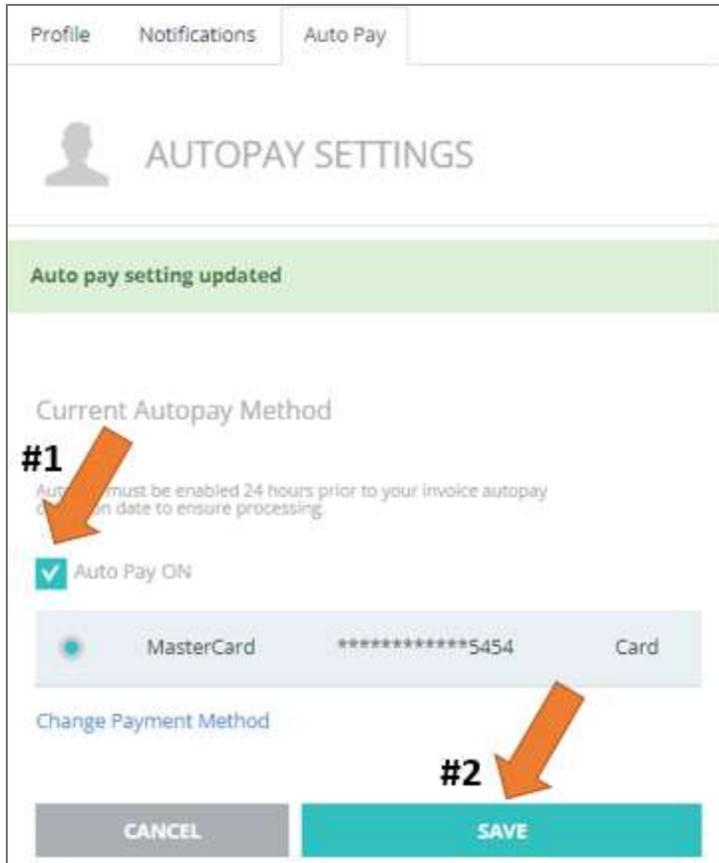
Bank account added successfully. Select Autopay Card/Bank

NEW CARD | **NEW BANK ACCOUNT**

Checking *****6789 Bank Account

SAVE

5. Next, turn 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:



- The customer may return to the Dashboard. If the invoice due date is in the future, then they will see a message indicating that “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]”.

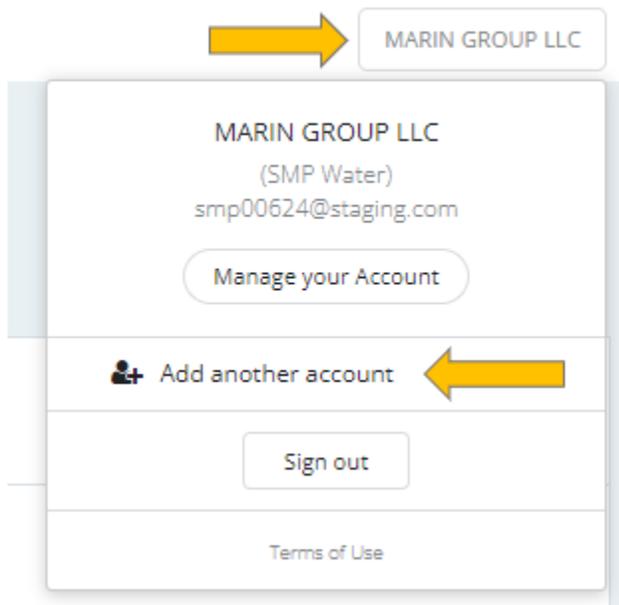


Ability for a Customer to Link Accounts

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.