



Biller Genie – Getting Started

Program: Biller Genie Payment Portal

Description: Setting up payment methods, making payments, viewing invoices and payment history.

Log into Biller Genie

1. You should have received (or will receive shortly) an invitation email from Biller Genie.
 - a. The invitation email is titled **Welcome to the Customer Portal**. Click the **link** in the welcome email to set your password.
2. A **second email** will be sent to confirm your email for your account, and then you may log in to the portal.

NOTE: If you have not received the Welcome Email or the Confirmation Email, please be sure you're checking the same email we have in your customer profile and check your spam folder.



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
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View & Pay Invoices in the Customer Portal


1. In the Customer Portal, you may view your:
 - a. open invoices,
 - b. invoice status,
 - c. balance amount,
 - d. and can also select to make a payment.
2. The date the invoice was created is displayed along with the invoice status. You may view the full invoice by simply clicking on the **invoice number**.





Marlenita's Cafeteria
9999 NE 2nd AVE , 314
Miami Shores, FL 33138

 **Invoices**

 **History**

 **Profile**

 **Vault**

 Invoices

Open ▾

Search Invoices

Inv No.	Display Name	Created	Due	Balance	Status	Amount	Select
1019	Sushi by Katsuyuki	5/30/2019	6/29/2019	\$83.66	93 day(s) late	\$ 83.66	<input type="checkbox"/> No
1018	Sushi by Katsuyuki	5/23/2019	6/22/2019	\$83.66	100 day(s) late	\$ 83.66	<input type="checkbox"/> No

« < 1 > »

2 records total

Payment Method

Payment Method

Nothing selected ▾

+ New card

+ New ACH account

Total

\$

CVV ?

☒ I agree to the Terms & Conditions



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- When an invoice is selected for payment, the total amount will be displayed and can be immediately paid using a saved method of payment or by adding a new one, such as ACH or credit card.



Staging

Marlenita's Cafeteria

9999 NE 2nd AVE , 314
Miami Shores, FL 33138



Invoices



History



Profile



Vault

Invoices

Open

Search Invoices

Search by Invoice Number

Inv No.	Display Name	Created	Due	Balance	Status	Amount	Select
1083	Bill's Windsurf Shop	9/26/2019	10/26/2019	\$28.00	Current	\$ 28.00	<input checked="" type="checkbox"/>
8	Bill's Windsurf Shop	9/9/2019	9/9/2019	\$106.00	21 day(s) late	\$ 106.00	<input checked="" type="checkbox"/>
1075	Bill's Windsurf Shop	9/5/2019	10/5/2019	\$605.00	Current	\$ 605.00	<input checked="" type="checkbox"/>
1052	Bill's Windsurf Shop	8/12/2019	9/11/2019	\$2,500.00	19 day(s) late	\$ 2,500.00	<input type="checkbox"/>

« ‹ 1 › »

4 records total

Payment Method

Payment Method

visa Ends in 1111

+ New card

+ New ACH account

Total

\$ 739.00

Pay Invoices

Add Card

Name

Bill Lucchini

Card Number



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History

1. You may view your payment history under the **history tab**.



Biller Genie Production Sandbox
9999 NE 2nd Avenue , Suite 314
Miami Shores, FL 33138

Invoices

History

Profile

Vault

Transactions

Search Transactions

Search by Id, Account Number, Amount

ID	Type	RespMSG	Amount	Name on Card	Account Number	Processed On	Quick Actions
64972	Sale	Approved	\$315.00	Matteo Christopher	Ends in 1111	8/10/2019 12:03:46 AM	Email receipt View Invoice
60868	Void	Approved	(\$1.00)	MARLENE CABRERA	Ends in 0371	7/29/2019 5:29:47 PM	Email receipt View Invoice
60867	Sale	Approved	\$1.00	MARLENE CABRERA	Ends in 0371	7/29/2019 5:28:39 PM	Email receipt View Invoice
60866	Sale	Decline	\$1.00	MARLENE CABRERA	Ends in 0371	7/29/2019 5:28:26 PM	Email receipt View Invoice
38896	Sale	Approved	\$22.66	Matteo Christopher	Ends in 1111	5/6/2019 9:53:24 AM	Email receipt
4052	Sale	Approved	\$12.00	Matteo Christopher	Ends in 1111	5/13/2018 12:00:50 AM	Email receipt



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Vault

1. The Vault is where you can edit, delete, or add a **payment method**.
 - a. If you choose to submit a signed and approved ACH authorization form, it will be available for INSYTE to download in the Vault (see Authorizing ACH Processing).
2. You may decide if and when to run **auto pay**, either on the Create Date or Due Date of the invoice.

Staging

Marlenita's Cafeteria

9999 NE 2nd AVE , 314
Miami Shores, FL 33138

Invoices

History

Profile

Vault

Stored Payment Methods

Search Payment Methods

Search by Account Number

+ Add Payment Method

Name	Type	Card Number	Address	Quick Actions
Bill Lucchini	Card	Ends in 1111	12 Ocean Dr. , Half Moon Bay, CA 94213	Edit Delete

« ‹ 1 › »

1 records total

Auto Pay Settings

Auto Pay Invoices ☐ No

Auto Pay On

Create Date

Payment Method

Nothing selected

+ New card

+ New ACH account

Save

3. When a new card or new ACH account is selected, a drop-down will appear for you to add your selected payment method.



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Invoices

History

Profile

Vault

Stored Payment Methods

Search Payment Methods

Search by Account Number

+ Add Payment Method

Name	Type	Card Number	Address	Quick Actions
Bill Lucchini	Card	Ends in 1111	12 Ocean Dr., Half Moon Bay, CA 94213	Edit Delete

« (1) »

1 records total

Auto Pay Settings

Auto Pay Invoices ☐ No

Auto Pay On

Create Date

Payment Method

Nothing selected

+ New card

+ New ACH account

Save

Add Card

Name

Bill Lucchini

Card Number

Exp Date

01 19

StreetAddress

12 Ocean Dr.

StreetApt

StreetCity

Half Moon Bay

State

California

Zip

94213

Save



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Authorizing ACH Processing

1. You may store ACH accounts as a payment method through the customer portal.
2. After entering your ACH account information and clicking **save**, you will receive the **authorization form** to sign.

A screenshot of a web form titled "Add ACH Account" with a close button (X) in the top right corner. The form contains the following fields: First Name (Biller), Last Name (Genie), Address (801 W Georgia St), City (Vancouver), State (Alabama dropdown), Zip (12345), Phone ((111) 222-3333), Bank Name (Knowledge base bank), Account Type (radio buttons for Personal Checking, Personal Savings, Business Checking), Account Number (123456789999), and Routing Number (111111118). A red arrow points to the "Save" button at the bottom right of the form.

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ACH Authorization Form

Alternative actions ▾

Powered by Adobe Sign

Please sign: ACH Debit Authorization Form

Next required field 1

☒ Open Ended Frequency ☒ Variable Payment Amount

9/25/2019

Date of First Authorization

I hereby authorize the above-named Merchant to Debit the Bank Account referenced herein, via the Automated Clearing House system at regular intervals while this authorization remains in effect. I understand that this authorization will remain in effect until I cancel it in writing, and I agree to notify the Merchant in writing of any changes in my account information or termination of this authorization at least 15 days prior to the next billing date. Furthermore, I authorize First ACH to debit, if the payment is returned for any reason, a rejected/returned item fee of \$25 or the maximum amount allowed by law.

Start

Click here to sign

Signature of Account Holder

Biller Genie

Print Name of Account Holder

9/25/2019

Date

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Get started today at www.biller genie.com

FIRST ACH

3. After clicking on the **start** or **click here to sign** section, a drop-down menu will reveal itself where you type your signature; additionally, you have the option to draw out your signature.

ACH Authorization Form

Alternative actions ▾

Powered by Adobe Sign

Next required field 1

Type Draw

Type your signature here

Close Apply

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FIRST ACH

4. Once applied, the signature in the ACH form reveals a **click to sign button**. Once clicked, an **email address** is required to receive the signed authorization form via email.



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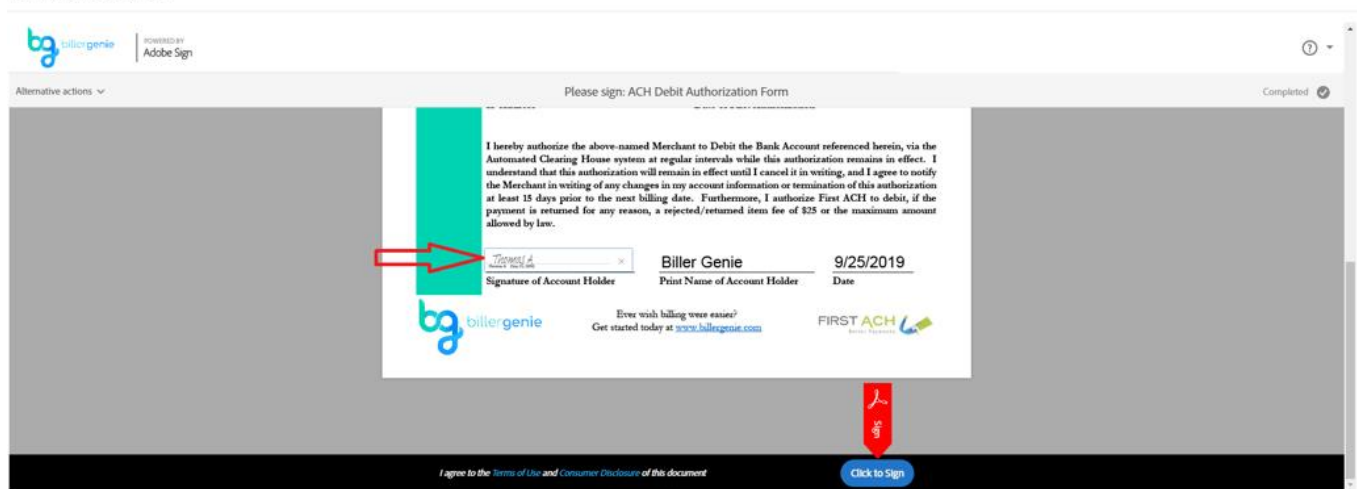
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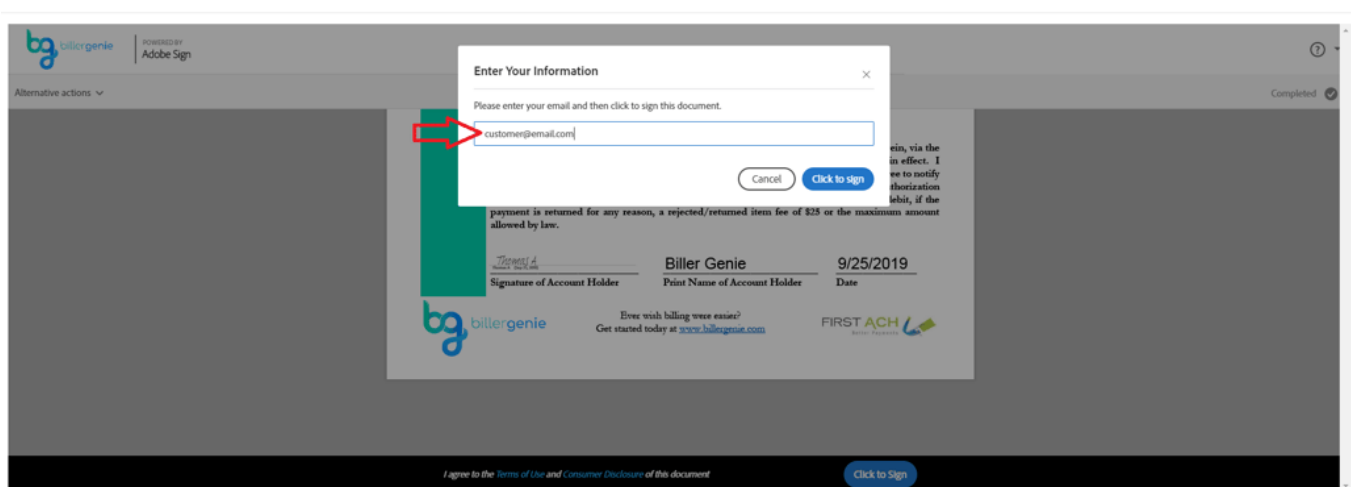
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ACH Authorization Form



ACH Authorization Form



- Once the authorization form has been signed and approved, the ACH account will be stored in the **Vault** of the customer portal.



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NOTE: If you missed the auto e-sign prompt, you may simply click on the **Vault** and "Authorize" the saved ACH payment on file.

Switch Job/Sub-Customer: Bruce Test Hello Bruce Test (Company B) <<17043>>



Edward's Bakery
11243 NW 3RD ST
Hollandale Beach, FL 11236

Invoices

History

Profile

Vault

Stored Payment Methods

Search Payment Methods
Search by Account Number

+ Add Payment Method +

Name	Type	Card Number	Address	Quick Actions
Biller Genie	Ach	Ends in 9999	801 W Georgia St , Vancouver, AL 12345	Authorize
Bruce Test	Card	Ends in 1111	801 W Georgia St , Vancouver, 33009	Not Available
Bruce Test	Card	Ends in 1111	801 W Georgia St , Vancouver, V6C 1P7	Not Available

3 records total

Auto Pay Settings

Auto Pay Invoices ☒ Yes

Auto Pay On
Due Date

Payment Method
Ends in 1111

+ New card

+ New ACH account

Save



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Once the ACH authorization is stored on file, both you and INSYTE will have access to process all future transactions on the ACH account without having to request subsequent authorization forms.

Customer Portal



 Vault

Auto Pay Settings


Auto Pay Invoices ☒

Auto Pay On
Due Date

Payment Method
Ends in 9999

VISA Ends in 1111

VISA Ends in 1111


 Ends in 9999


Save



Merchant View




Create Transaction 

Stored Payment Methods 

VISA (Ends in 1111)

VISA (Ends in 1111)

 (Ends in 9999)

+ Add a Stored Card

+ Add an ACH Account



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