

Paperless Sign Up & Management

The Paperless feature will alleviate the need to send out paper bills to your customers signed up for paperless. Instead the customer will receive up to 3 email notifications from which he can click a link and pay his bill. The customer is presented with the paperless option frequently throughout the one-time payment process and can even sign up for paperless without being registered. In addition to electing the paperless option, the customer must confirm via an email from Invoice Cloud.

How to Sign Up for Paperless if Registered:

1. From the Customer Portal the registered user selects the **Edit** button to the right of **Paperless** or from the **My Profile** menu at the top of the screen they can select **Paperless**.

The screenshot shows the 'My Profile' dropdown menu with the following items: Payment Methods, Update Account Info, Update Email Address, AutoPay, Paperless (highlighted), Pay by Text, Recurring Scheduled Payments, Linked Accounts, and Change Password. Below the menu, the 'Paperless' option is highlighted in a red box with an 'EDIT' button next to it.

TRAINING - TEST My Account ▾ My Profile ▾ Support ▾

Your Account at a glance

I want to...

[Pay my invoices >](#)

- View my payment history >
- View my scheduled payment history >
- Manage my AutoPay settings >
- Manage my Paperless settings >
- Update my account information >

Recent Open Invoices >

Due On	Invoice Date
6/30/2019	6/1/2019

Recent Closed Invoices >

Invoice Date	Account #
3/1/2019	15572

Recent Payments >

Payment Date	Account #	Amount
4/9/2019	15572	\$167.28
4/9/2019	15572	\$4.93

Upcoming Scheduled Payments >


No history available

AutoPay EDIT

Paperless EDIT

Pay By Text EDIT

- From the **Paperless** page the user selects, **Yes** and clicks on **Save my changes**.




Paperless

Going Paperless saves time and money by eliminating the need for paper printing and mailing of invoices and payments. [Need help with this feature?](#)

Account #	Type	<div style="display: flex; align-items: center; gap: 5px;"> ✔ ✘ </div>	Status
15572	Real Estate	<div style="display: flex; align-items: center; gap: 5px;"> <input type="radio"/> Yes <input checked="" type="radio"/> No </div>	Not Paperless

✔ Save my changes

- The user receives a message stating *Your changes have been saved*. The user should check their email to complete the process. If they fail to confirm via email the user can return to this page and **Resend** the email to complete registration or they can **Cancel Pending Registration**.



Paperless

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Your changes have been saved.
✕

Account #	Type	<div style="display: flex; align-items: center; gap: 5px;"> ✔ ✘ </div>	Status
15572	Real Estate	<div style="display: flex; align-items: center; gap: 5px;"> <input type="radio"/> Yes <input checked="" type="radio"/> No </div>	Resend Cancel Pending Registration

✔ Save my changes

4. The user will be sent an email to complete the Paperless registration. The paperless registration is not complete until the user opens the email and selects **Complete Registration**. The email notification contains all of the Terms and Conditions, the Electronic Signature Disclosure and a link the user must click on to complete the Paperless registration.

I have read and Agree to Terms and Conditions below.

Complete Registration

Dear MALKIN ANDREW &

Thank you for selecting paperless billing on 4/5/2019 1:43:20 PM, we're glad you'll be benefiting by reducing clutter while you are helping the environment. You will no longer receive paper statements (unless legally required to do so for your bill type). You may reinstate paper invoicing at any time via your account profile.

If you have any questions about your account, please contact us at trainingTest@invoicecloud.com.

If you prefer not to go paperless, simply do not complete registration below or go to Paperless Options in your account profile and click cancel registration.

Please Note: To ensure delivery of account related email notifications, please add no-reply@invoicecloud.net to your safe senders list.

To finalize your enrollment in paperless billing, you must click on the link below to verify that you have received and read this notification.

Sincerely,

Training - TEST

Account Number:
PP-04628

[Online Billing Privacy Policy](#)

I have read and Agree to Terms and Conditions below.

Complete Registration

Paperless Billing Terms and Conditions
You have agreed to receive email notifications telling you that your bill is available to view and pay online. Instead of receiving a paper bill, you will view the same bill online. The bill (available in both pdf and html formats) can be easily printed should you need a paper copy. You understand that:

- Training - TEST will stop mailing you a paper bill each billing period.
- You must provide up-to-date contact information – if your email changes, you must update your online account prior to the next bill in order to receive notice of that bill availability. In the event you do not receive notification, it is your responsibility to sign in and check on the delivery of new bills.
- If emails are returned as undeliverable, we reserve the right to return your billing to paper. You may re-enroll at anytime after correcting any email address errors.
- Access to your current bill and history is available 24x7 through the Training - TEST website.

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Updated 4-10-19

- After clicking on the **Complete Registration** link in the email, the user will be directed to a confirmation page where they can login to the Customer Portal.

Paperless Registration Completed

You have successfully completed the Paperless Registration Confirmation process. Please Note: it may take more than one billing cycle for the paperless process to take effect.

You may close this window at any time and return to what you were doing.

[Sign In >](#)

- The Customer Portal dashboard appears showing the green check confirming the user's Paperless sign up.

Your Account at a glance

I want to...

[Pay my invoices >](#)

- [- View my payment history >](#)
- [- View my scheduled payment history >](#)
- [- Manage my AutoPay settings >](#)
- [- Manage my Paperless settings >](#)
- [- Update my account information >](#)

Services

C
AutoPay
EDIT

P
Paperless
✔

M
Pay By Text
EDIT

Recent Open Invoices >

Due On	Invoice Date
7/25/2019	6/1/2019

Recent Closed Invoices >

Invoice Date	Account #
4/12/2019	PP-04628

Recent Payments >

Payment Date	Account #	Amount
4/5/2019	PP-04628	\$220.32
4/5/2019	PP-04628	\$0.40

Upcoming Scheduled Payments >

No history available

Paperless Registration for Unregistered Customers

1. When users are making a one-time payment, on the final step they have the opportunity to continue with the paperless registration. Based upon your configuration settings, the check mark is proactively placed in the box to initiate the **Paperless** registration.

Payment Options
Payment Information
Review Payment

Review your Information

Your Credit Card [✎ Edit](#)

RUZICKA ROBERT A & ARLENE H
XXXXXXXXXXXX1111
4 / 2019

Billing Address

30 ERMINE STREET
FAIRFIELD, CT
06824-5109
training@invoicecloud.com

Send me Pay by Text messages for future invoices

I would like to sign up for Paperless

Yes, I want to reduce clutter and save paper. I understand that at any time, I can print out my bill and/or decide to receive paper bills by editing my online profile. Please select the Invoice Types you wish to go Paperless for.

Account	Email Address	Go Paperless?
RUZICKA ROBERT A & ARLENE H	<input type="text" value="training@invoicecloud.com"/>	<input checked="" type="checkbox"/> Real Estate

In order to complete your enrollment, you must verify receipt of the Paperless Registration Information email which will be sent to your email address on record for each Invoice Type selected.

Payment Summary

Invoice #	Amount
2016080015572-1 - View	\$167.28
SUBTOTAL	\$167.28
SERVICE FEE *	+ \$4.93
GRAND TOTAL	\$172.21

Process Payment \$172.21

Payer agrees to the Invoice Cloud Payer Terms and Conditions [🔗](#)

* If you have a question on the bill, please contact us at (901) 737-8686.
Service fees are non-refundable. If you think there is an error on the Credit Card, ACH or Service Fee charge, please contact Invoice Cloud Customer Service at 877-256-8330, Option 2.

2. The user receives an email to complete the paperless registration. The user should check their email to complete the process. If they fail to confirm via email, the user will not be registered for Paperless.

Manage Paperless Settings

1. From the Customer Portal dashboard, the user can select, **Manage my Paperless settings** or select **Paperless** from the **My Profile** menu at the top of the page.

TRAINING - TEST My Account ▾ My Profile ▾ Support ▾

Your Account at a glance

I want to...

- Pay my invoices >
- View my payment history >
- View my scheduled payment history >
- Manage my AutoPay settings >
- **Manage my Paperless settings >**
- Update my account information >

Recent Open Invoices >

Due On	Invoice Date
7/25/2019	6/1/2019

Recent Payments >

Payment Date	Account #	Amount
4/5/2019	PP-04628	\$220.32
4/5/2019	PP-04628	\$0.40

My Profile ▾

- Payment Methods
- Update Account Info
- Update Email Address
- AutoPay
- Paperless**
- Pay by Text
- Recurring Scheduled Payments
- Linked Accounts
- Change Password

AutoPay EDIT

Paperless ✓

Pay By Text EDIT

Recent Closed Invoices >

Invoice Date	Account #
4/12/2019	PP-04628

Upcoming Scheduled Payments >

No history available

- From the **Paperless** page the user has the option to turn off paperless by selecting **No** and clicking on **Save my changes**.

Paperless

Going Paperless saves time and money by eliminating the need for paper printing and mailing of invoices and payments. [Need help with this feature?](#)

Account #	Type		Status
PP-04628	Personal Property	<input checked="" type="radio"/> Yes <input type="radio"/> No	Paperless

✓ Save my changes

- The user receives a message stating *Your changes have been saved*. The indicator changes to **No** and the status indicates *Not Paperless*.

Paperless

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Your changes have been saved. ✕

Account #	Type		Status
PP-04628	Personal Property	<input type="radio"/> Yes <input checked="" type="radio"/> No	Not Paperless

✓ Save my changes