Online Payment System

Documentation

Table of Contents

Sign In

➢ You will be assigned by email a Client ID, Username, and Password to Sign In to the Customer Administration Console (https://app.myonlinebill.com/mob/adminlogin.do). Your password and session expiration are controlled by your assigned Company system administrator.

Virtual Terminal Link

> The "Virtual Terminal" link is used IF entering in the **Customer's payment method**.
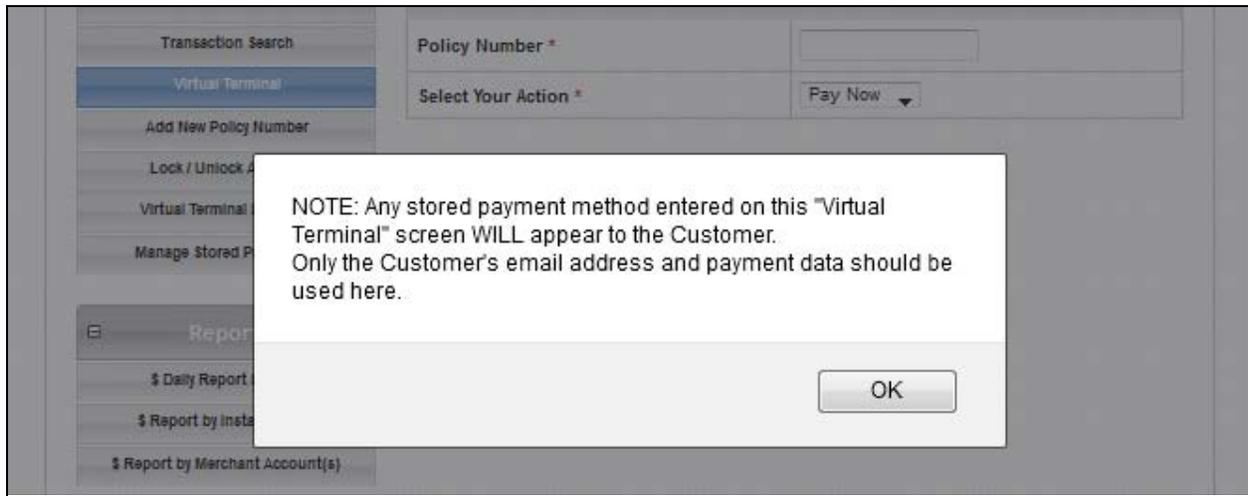
Virtual Terminal

➢ Search a Customer by Account Number, exclude prefixes, and then specify from the "Select Your Action" dropdown menu whether to process a transaction with Pay Now or Auto-Pay.

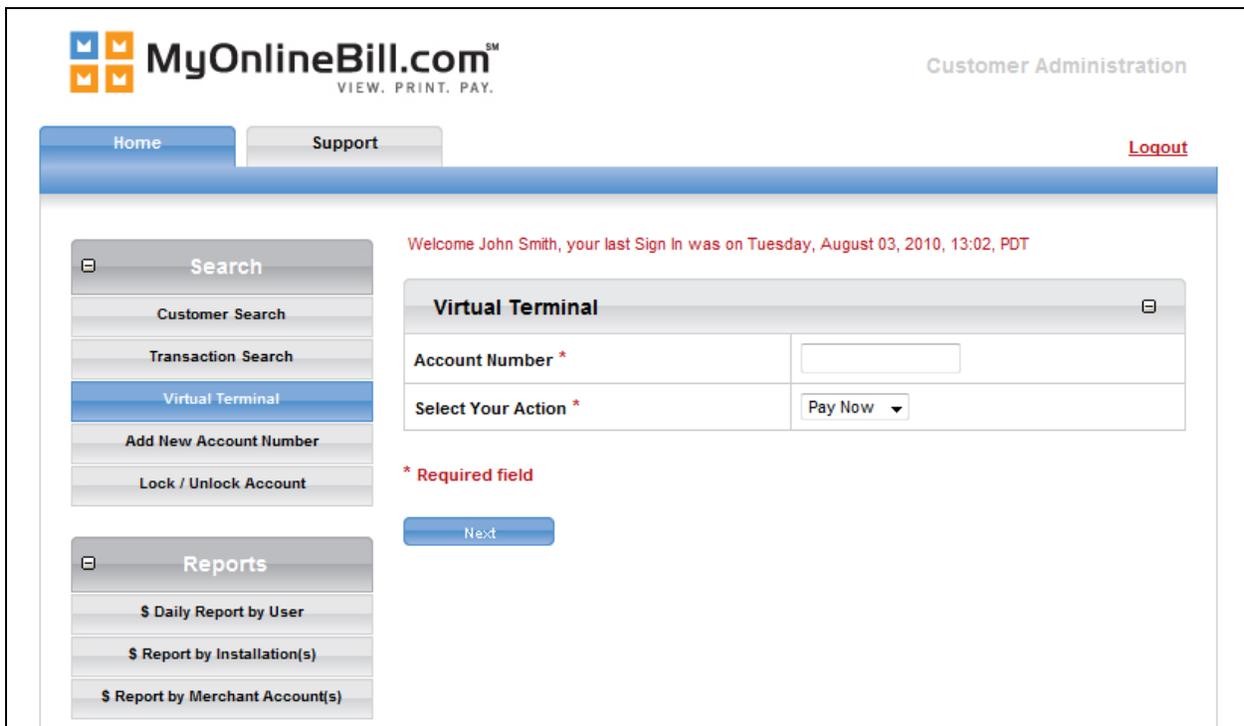➢ Pay Now: Will enable an Agent to process a Customer payment immediately. Pay Now's "Schedule Payment" option will enable an Agent to schedule a Customer payment for a future date as specified by the Customer.

➢ Auto-Pay: Will enable an Agent to set-up and schedule a Customer for automatic payments. Auto-Pay is "Pending" until the next invoice is imported into the system and then becomes "Active" (this is to help avoid duplicate payments). Once activated, the "Scheduled Auto-Pay Date" is Client specific.

➢ For credit cards, no duplicate payment (same $ amount and credit card number) can be "Authorized" within a 5 minute window of one another.

Virtual Terminal > Pay Now

- "Virtual Terminal" will enable an Agent to process/schedule a Customer payment by selecting "Pay Now".
- The "Payment Detail" and "Customer Detail" is auto populated for those Customers included in the import files sent by Client. An Agent can select to "Save" or "Don't Save" the transaction information entered under "Stored Payment Type(s)".
- Select the "Update Stored Payment" check box to update stored payment information.
- The "Email Address Required" field is "Required" for Registered End Users only. To avoid entering an email address (applicable to Non-Registered End Users), select the "Not Required" button.

Last Name	Smith
Billing Address 1 *	6861 E. ORANGETHORPE AVE
Billing Address 2	
City *	CERRITOS
State / Province list *	CA
Zip / Postal Code *	90620
Country *	UNITED STATES
Email Address	samplecustomer@hotmail.com
Email Address Required *	◉ Required ○ Not Required
Phone Number	

* Required field

[Back] [Pay Now]

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ABOUT SSL CERTIFICATES

Virtual Terminal > Auto-Pay

- ➢ "Virtual Terminal" will enable an Agent to set-up automatic payments by selecting "Auto-Pay".
- ➢ The "Payment Detail" and "Customer Detail" is auto populated for those Customers included in the import files sent by Client. An Agent can select to "Save" or "Don't Save" the transaction information entered under "Stored Payment Type(s)".
- ➢ Select the "Update Stored Payment" check box to update stored payment information.
- ➢ The "Email Address Required" field is "Required" for Registered End Users only. To avoid entering an email address (applicable to Non-Registered End Users), select the "Not Required" button.

"Virtual Terminal > Auto-Pay" screenshot continued…

Zip / Postal Code *	90620
Country *	UNITED STATES ▾
Email Address *	samplecustomer@hotmail.com
Email Address Required *	◉ Required ○ Not Required
Phone Number	

* Required field

Back   Save Auto-Pay

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ABOUT SSL CERTIFICATES

Virtual Terminal > Auto-Pay (if "Pending" or "Active")

➢ "Auto-Pay" will enable the Agent to "Cancel Auto-Pay" or "Update/Set-up Auto-Pay Details".
➢ The "Scheduled Auto-Pay Date" is set by Farmers.
➢ Auto-Pay is "Pending" until the next invoice is imported and then becomes "Active" (this is to help avoid duplicate payments). Once activated, the "Scheduled Auto-Pay Date" is set by Farmers.

Virtual Terminal by Admin

➢ The "Virtual Terminal by Admin" link is used IF entering in the **Agent's approved payment method** to process payments for one or multiple Customers at once.
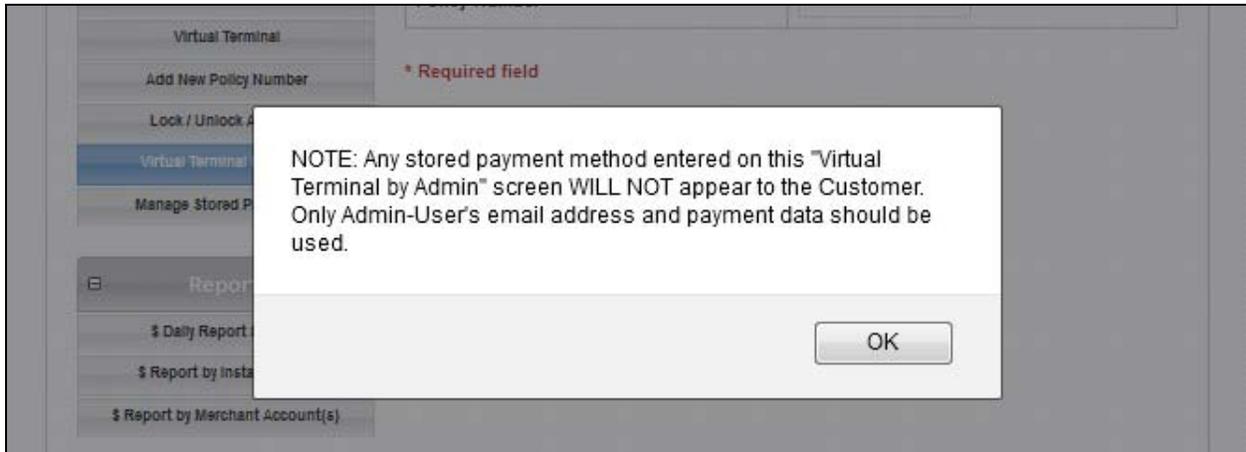
Add Customer(s)

➢ An Agent will first "Add" the Customer(s) and then select "Submit" to verify and locate the Customer(s) entered. Exclude prefixes on policy numbers.

Submit Customer(s)

➢ An Agent will verify and then "Submit" the Customer(s) "Added" OR select "Back" to edit as needed.

➢ An Agent will enter the "Customer's Email Address" and "Amount Due" (this may already be pre-populated). Then enter the Agent's approved "Payment Detail" and select the "Pay Now" button to continue (most of the fields found on this screen will already be pre-populated).

Payment Screen 2 of 3

➢ An Agent will verify the information entered on the previous screen before processing the payment. Once verified, the Agent will then select the "Process" button to continue.

Payment Screen 3 of 3

➢ An Agent will receive a real-time response next to the "Payment Status" field in regards to whether the payment is Authorized (for Credit Card transactions), or Accepted (for ACH transactions), or Declined. The associated Transaction ID will be listed next to the "Payment Status" field.

Agent's Email Receipt (Optional)

➢ An Agent can enter the their Email Address on Screen 1 of 3 to send a payment receipt automatically via email. A list of the individual payments by Customer will be attached ("Payment Summary.csv").

```
Email Subject: Payment Receipt

Bob Smith,

Thank you for your online payment. Please print or file this electronic
receipt for your records.

---------------------------------------------

Payor: Bob Smith
Payment Date: 02-06-2012 17:10:36 MST
Payment Amount: $350.00 USD
Source Account Type: ACH/Electronic Check
Source Account ID: XXXXX6789

The attached file contains the individual Transaction Detail(s).

---------------------------------------------

Thank you,
Sample Company


PLEASE DO NOT RESPOND TO THIS EMAIL. This email box is not monitored.
```

➢ Sample CSV attachment ("Payment Summary.csv")…

	A	B	C	D
1	Reference ID	Amount	Transaction ID	Transaction Status
2	12345678	200	45238242	ACCEPTED
3	12345679	150	45238243	ACCEPTED

Customer's Email Receipt (Optional)

➢ An Agent can enter the Customer's Email Address on Screen 1 of 3 to send a payment receipt automatically via email.

➢ An Email Receipt can also be sent at any time from the "Individual Transaction Detail Report" screen.

```
Email Subject: Payment Receipt

ABC Company,

Thank you for your online payment. Please print or file this electronic
receipt for your records.

-----------------------------------------------

Payor: John Doe
Policy Number: 12345678
Account Name: ABC Company
Payment Date: 02-06-2012 16:47:52 MST
Payment Amount: $100.98.00 USD
Payment Status: ACCEPTED
Payment Reference ID: 45238162
Source Account Type: ACH/Electronic Check
Source Account ID: XXXXX6789


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Thank you,
Sample Company


PLEASE DO NOT RESPOND TO THIS EMAIL. This email box is not monitored.
```
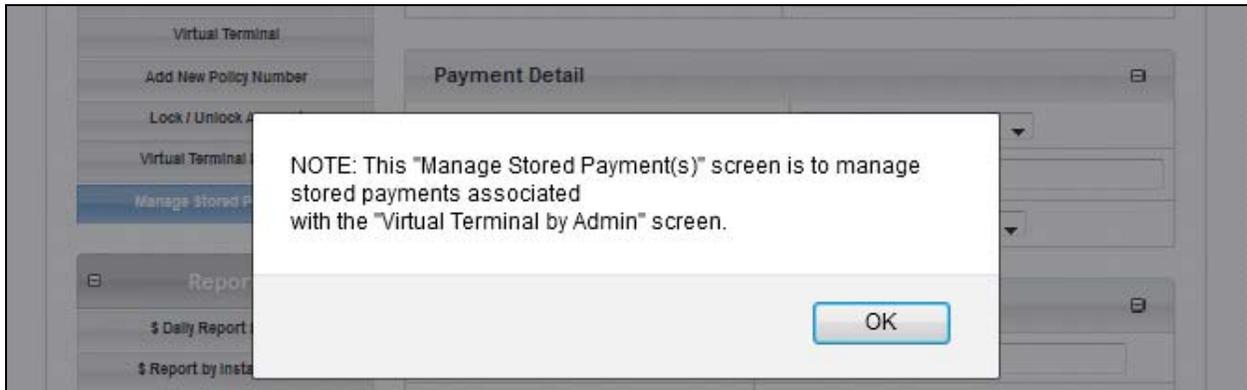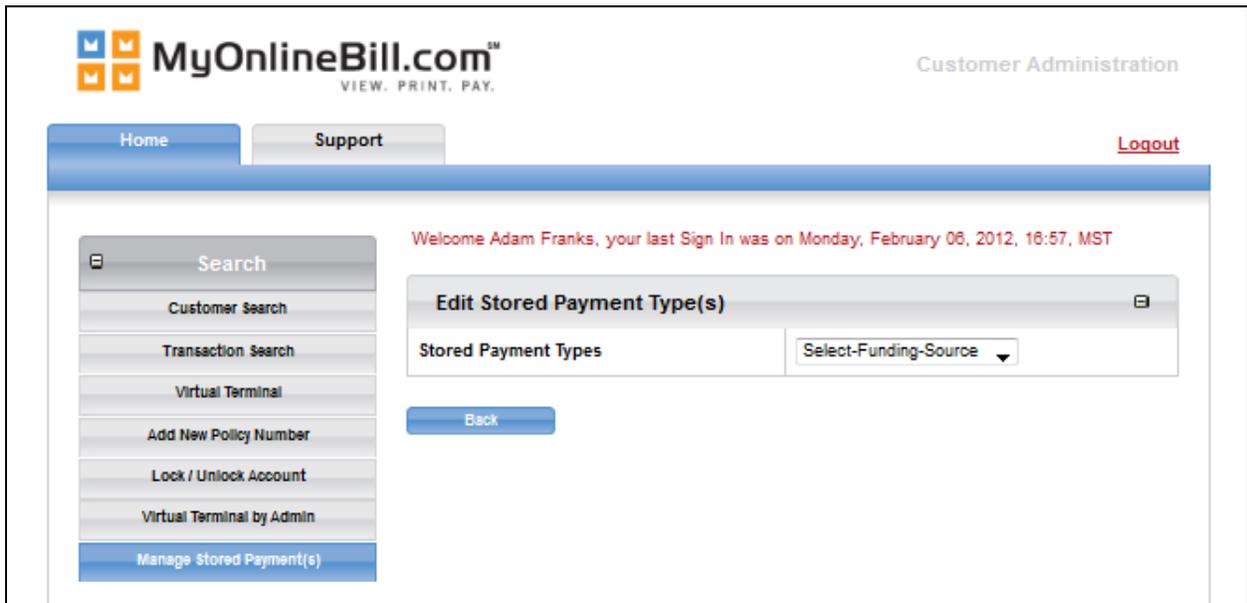
Manage Stored Payment(s)

➢ An Agent will manage here their approved stored payment(s).

➢ Then selecting the applicable stored payment to Edit or Delete.

Delete or Save/Update Stored Payment

➢ An Agent can select to "Delete" or "Save/Update" an Agent's approved stored payment.

Customer Search (Home)

➢ Search a Customer by: Account Number, Account Name, Email Address, or Username.

Customer Search > Customer Search Result(s)

➢ Search Result(s) after searching by Customer. Click "View" to view "Customer Detail".

Customer Search > Customer Search Result(s) > Customer Detail

➢ "Customer Detail" will provide all of the Customer's system information at a glance to answer questions, modify settings, and make payments. An Agent (on behalf of the customer) can manage stored payments, set-up Auto-Pay, process one-time payment, and more…

Account - Auto-Pay Status	Pending
Account - Paperless Status	Active
Scheduled Payments	

* Required field

[Back]   [Update]

Billing History - Account 1091 ⊟

Date	Number	View Bill	Amount Due	Payment
07-27-2010		View Bill	$45.00	Pay Now

View All

Payment History - Account 1091 ⊟

Date	Amount	Payment Type	Payment ID	Transaction ID	Receipt
07-27-2010 09:50:33 PDT	$45.00	ACH/Electronic Check	x6789	40280646	Print Receipt

View All

User History - Account 1091 ⊟

Date	User	Item	Description
08-03-2010 12:41:11 PDT	blake123	LOG_IN	blake123 log...
07-30-2010 09:44:33 PDT	blake123	LOG_IN	blake123 log...
07-29-2010 11:55:14 PDT	blake123	PASSWORD_RECOVERY	blake123 req...

View All

Admin History - Account 1091 ⊟

No Admin History Exists for Account.

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Customer Search > Customer Search Result(s) > Customer Detail > Manage Stored Payment Type(s)

➢ "Manage Stored Payment Type(s)" will enable the Agent to "Update" or "Delete" a Customer's stored payment type. NOTE: All stored payment types are stored securely by our PCI Compliant merchant processing Partner. If updating, the "Account Number" will need to be re-entered for both stored ACH and credit cards payment types.

➢ NOTE: The stored payment type is associated by User and NOT by Account. For example, a User with 2 different account numbers (associated with their single username) will see the same stored payment(s) under each account number. The payment being made is associated by Account and NOT by User. For example, a User with 2 different account numbers and 2 different stored payment types (associated with their single username) can set-up each Auto-Pay account (2 in this example) with a different stored payment type (2 in this example), if desired.

Customer Search > Customer Search Result(s) > Customer Detail > View Bill

➢ "View Bill" will enable the Agent to view a customer's bill to answer any billing questions as needed. The bill is viewable as a PDF file.

Transaction Search

➢ Search a Transaction by: Transaction ID, Account Number, Transaction Amount, or Transaction Date.

Transaction Search > Transaction Search Result(s)

➢ Search Result(s) after searching by Transaction. Click individual "Transaction ID" link(s) to view "Individual Transaction Detail Report".

Transaction Search > Transaction Search Result(s) > Individual Transaction Detail Report

➢ "Individual Transaction Detail Report" will enable an Agent to "View" individual transactions.
➢ Credit Card Transactions: fund next business day (Settlement time is 12am merchant time zone).
➢ ACH Transactions: typically fund within 2-3 business days (Settlement time is 3:30pm, business days).

$ Daily Report by User

➢ "$ Daily Report by User" will enable an Agent to quickly generate a Daily Report of payments processed by the Agent.

Update Password

➢ "Update Password" will enable an Agent to update their associated Password and Agent Details as needed.

Support

- ➢ "Support" will enable an Agent to generate support requests as needed. This Support email is sent to the Company System Administrator/point-of-contact.

Online Payment System

Virtual Terminal Real-time Link - Application
Payments Processed from SCIPS Agent Rating Module

➢ An Agent will automatically link to this Virtual Terminal after selecting the applicable integrated payment link from the SCIPS Rating Module (most of the fields found on this screen will already be pre-populated). The payment amount will default to the first installment due. An Agent will then enter the "Payment Detail" and select the "Pay Now" button to continue.

➢ An Agent will verify the information entered on the previous screen before processing the payment. Once verified, the Agent will then enter the "Process" button to continue.

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Customer Administration

Logout

Welcome Adam Franks, your last Sign In was on Monday, February 06, 2012, 16:34, MST

Virtual Terminal

Customer Policy Number	12345678
Comments	

Account Detail

Payment Amount	$100.98
Funding Source	ACH x6789
Payment Type	ACH/Electronic Check
Bank Routing Number	123456780
ACH Bank Account Number	XXXXX6789
Account Type	Business Checking

Customer Detail

Billing Name	John Doe
Billing Address 1	12345 Somewhere Road
Billing Address 2	
City	Anywhere
State / Province	NJ
Zip / Postal Code	90620
Country	UNITED STATES
Email Address	john.doe@website.com
Phone Number	

Back   Process

- An Agent will receive a real-time response next to the "Payment Status" field in regards to whether the payment is Authorized (for Credit Card transactions), or Accepted (for ACH transactions), or Declined. The associated Transaction ID will be listed within the pop-up box that automatically appears.

- In Internet Explorer, the browser window and session will automatically close after selecting "OK" or "Cancel" within the pop-up box. However, in Firefox, the browser window and session expiration may not automatically close unless the following is "True"… 1. Enter "about:config " into your FireFox address bar and press enter; 2. Make sure your "dom.allow_scripts_to_close_windows" is set as "True".
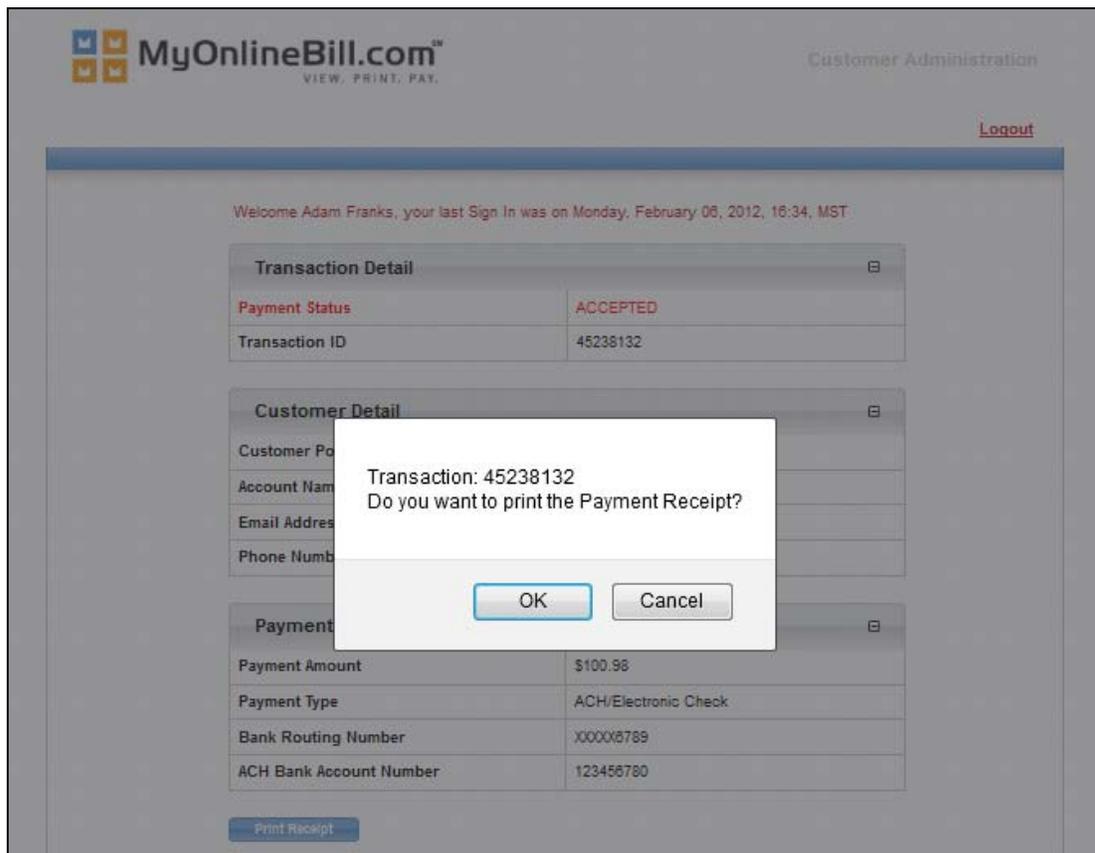
Payment Receipt (Optional)

➢ Select "OK" to view and/or print the associated transaction's Payment Receipt.

Date: 02-23-2012
Transaction ID: 45387300
Type Of Transaction: ACH/Electronic Check
Transaction Status: ACCEPTED

REF: 1122
Comments:
Tender Account: ACH x6789
Tender Amount: $100.98 USD

Signature:

_____

I agree to pay the above amount according to
the card issuer agreement.
(Merchant agreement if credit voucher)

Thank You!

Email Receipt (Optional)

- ➢ An Agent can enter the Email Address on Screen 1 of 3 to send a payment receipt automatically via email.

- ➢ An Email Receipt can also be sent at any time from the "Individual Transaction Detail Report" screen.

```
Email Subject: Payment Receipt

Sample Policy 1,

Thank you for your online payment. Please print or file this electronic
receipt for your records.

----------------------------------------------

Payor: John Doe
Policy Number: 12345678
Account Name: Sample Policy 1
Payment Date: 02-06-2012 16:47:52 MST
Payment Amount: $100.98.00 USD
Payment Status: ACCEPTED
Payment Reference ID: 45238162
Source Account Type: ACH/Electronic Check
Source Account ID: XXXXX6789


----------------------------------------------

Thank you,
Sample Company


PLEASE DO NOT RESPOND TO THIS EMAIL. This email box is not monitored.
```