

EPlay Tutorial

EPay

EPay allows your customers to pay online without having a Customer Account Access account. When you email Statement or Invoices, you can include an EPay link that allows your customers to go to a secure website and make payments on Invoices and Renewals.

Please note that you must already be using the Customer Account Access Module and must use Element for your credit card processor in order to use EPay.

Ace Pest Control

Company | Customer | Appointment

Company Setup

Lookup Tables

Printer Setup

Sales Assistant Setup

Backup Database

Download Add-Ons

Generate Service Orders

Generate Programs

Generate Finance Charges

Consolidate Invoices

Release Credit Card Billing

Release GL Batch

Close Period

Review Timesheets

PestPac Answers

System Date

You can turn ePay on in your Company Setup under Printer options.

Printer Setup

Show All

Save

Exit

Defaults

Service Order :: Invoice :: Statement :: Renewal :: Report :: Letter :: Label :: Post Card :: Collection :: Consolidated Invoice ::
Inspection Report :: Credit Card Receipts

Invoice Defaults

Invoice Form

Standard Non-Chemical Preprinted Custom

Print On Invoices

- | | |
|---|---|
| <input checked="" type="checkbox"/> Work Time | <input checked="" type="checkbox"/> Balance |
| <input checked="" type="checkbox"/> Terms | <input checked="" type="checkbox"/> Attributes |
| <input checked="" type="checkbox"/> Location Directions | <input checked="" type="checkbox"/> Time In/Out |
| <input type="checkbox"/> Billing Message | <input checked="" type="checkbox"/> Tech Name/License |
| <input checked="" type="checkbox"/> Bar Code | <input checked="" type="checkbox"/> Company Header |
| <input checked="" type="checkbox"/> Marketing Text | <input checked="" type="checkbox"/> Use Branch Information |
| | <input checked="" type="checkbox"/> Company Logo |
| | <input checked="" type="checkbox"/> Prices on Production Orders |

Print On E-Mail Invoices

- HTML Format
- EPay Link
- Company Header
- Use Branch Information

Subject Line:

Under the Invoice section, check the EPay Link checkbox to add the EPay link to Invoices that are emailed to customers. Please note that the “Email” checkbox must be checked in the Bill-To detail screen under Invoices for the customer in order for them to get emailed Invoices. Make sure to Save your changes when finished.

Printer Setup

Show All

Save

Exit

Defaults

Service Order :: Invoice :: **Statement** :: Renewal :: Report :: Letter :: Label :: Post Card :: Collection :: Consolidated Invoice ::
Inspection Report :: Credit Card Receipts

Statement Defaults


Statement Form

Standard Custom

Print On Statements

- Bar Code
- Company Header
 - Use Branch Information
- Company Logo
- Service Address

Print On E-Mail Statements

- HTML Format
- EPay Link 
- Company Header
 - Use Branch Information
- Billing Message

Subject Line:

Under the Statement section, check the EPay Link checkbox to add the EPay link to Statements that are emailed to customers. Please note that the “Email” checkbox must be checked in the Bill-To detail screen under Statements for the customer in order for them to get emailed Statements. Make sure to Save your changes when finished.

STATEMENT

Statement Date: 08/31/10

Main Branch Company Name
10 Kenneth Court
Jamesburg, NJ 08831
800-222-2222

Bill To [100205]
Kaylee Frye
3824 Main Street
NEPTUNE, NJ 07753

Date	Invoice	Description	Amount	Balance
Service Address: Frye, Kaylee 3824 Main Street, NEPTUNE, NJ 07753				
08/12/10	11347	Carpenter Ants	159.00	159.00
08/12/10	11348	Residential Monthly Service	159.00	159.00
08/12/10	11349	Gold Service	53.00	53.00
08/12/10	11350	Carpenter Ants	53.00	53.00
08/12/10	11351	Residential Monthly Service	159.00	159.00
08/12/10	11353	Carpenter Ants	53.00	53.00
08/12/10	10487	Carpenter Ants	50.00	50.00
08/12/10	11355	Carpenter Ants	53.00	53.00
08/12/10	11356	Residential Monthly Service	159.00	159.00
08/19/10	11374	Residential Monthly Service	58.30	58.30
Current	30 Days	60 Days	Over 90 Days	Total
956.30	0.00	0.00	0.00	956.30

Click this link <http://devcaa.pestpac.net/myaccount/ePay.asp?Token=FKECFDGLDFCEDDFDI> to pay your bill online.



At the bottom of the emailed statement, the customer can click on the embedded EPay link. This link has information about which Bill-To the statement belongs to and will automatically display the invoices connected to this Bill-To when clicked.



pay for a service

Account #: 100205

Please select the invoices you would like to pay:

Pay Date	Invoice	Description	Balance
<input checked="" type="checkbox"/> 08/12/2010	10487	Carpenter Ants	50.00
<input checked="" type="checkbox"/> 08/12/2010	11347	Carpenter Ants	159.00
<input type="checkbox"/> 08/12/2010	11348	Residential Monthly Service	159.00
<input type="checkbox"/> 08/12/2010	11349	Gold Service	53.00
<input type="checkbox"/> 08/12/2010	11350	Carpenter Ants	53.00
<input type="checkbox"/> 08/12/2010	11351	Residential Monthly Service	159.00
<input type="checkbox"/> 08/12/2010	11353	Carpenter Ants	53.00
<input type="checkbox"/> 08/12/2010	11355	Carpenter Ants	53.00
<input type="checkbox"/> 08/12/2010	11356	Residential Monthly Service	159.00
<input type="checkbox"/> 08/12/2010	11355	Carpenter Ants	53.00
<input type="checkbox"/> 08/12/2010	11356	Residential Monthly Service	159.00
<input type="checkbox"/> 08/19/2010	11374	Residential Monthly Service	58.30

Payment Amount: \$209.00

Name on Card:

Card Type:



SPECIAL OFFER

Try our rats & mice service!

[Click here](#) to have a sales representative contact you about this special offer

The customer can check the boxes next to the invoice(s) they want to pay. They must pay the full amount of each invoice selected. They then need to fill out the Name on Card and select a Card Type. Click on Next to continue.

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My Account



pay for a service

Card Information	* Denotes a required field
*Card Number:	<input type="text" value="4111111111111111"/>
*Expiration:	<input type="text" value="02"/> / <input type="text" value="2011"/>
CVV:	<input type="text" value="123"/>
Transaction Information	
Amount:	\$209.00

Submit

[Cancel Transaction](#)

Powered and Secured by Element Payment Services

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In this screen, the customer can enter in their credit card number, expiration date and CVV number into a secure Element window. Click on Submit when finished.

Ace Pest Control

My Account

Thank You

Your card was **APPROVED** for 209.00.

Your account balance will be updated upon review of this transaction by a member of our staff.

Receipt:

Date: 9/1/2010 11:00:30 AM
Customer: 100205
Transaction ID: 2000152425
Auth Code: 000000
Card Type: Visa
Card Number: *****1111
Amount: \$209.00

[Print Receipt](#)

[Email Receipt](#)

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Once the transaction is complete, the customer can print a receipt (see next slide for an example) or email themselves and receipt. The email will go to the Bill-To email address.

Credit Card Receipt

Company Information:

Main Branch Company Name
10 Kenneth Court
Jamesburg, NJ 08831
800-222-2222

Customer Information:

Bill-To Account: 100205
Kaylee Frye
3824 Main Street
NEPTUNE, NJ 07753
800-762-0301

Payment Date 09/01/2010

Amount \$209.00

Cardholder Name Kaylee Frye

Authorization Code 000000

Card Number *****1111

Card Type Visa

Expiration Date 2/11

Invoice Number	Description	Amount
10487	Carpenter Ants	\$50.00
11347	Carpenter Ants	\$159.00
Total		\$209.00

Custom Receipt Message for Ace Pest Control

This is the receipt that customers can print out for themselves after the credit card payment has been processed.

Payment Entry

Exit

Invoice: ... Bill-To: Payment Date: Frye, Kaylee
Method: Reference: Amount: Bill-To Balance: \$956.30
Unapplied: [Service:](#) GL Code:
Batch Amount: Batch completely applied. [Training for this Screen](#)

Credit Cards
(No Credit Cards on file)
[Use a New Card](#)

Credit Card Successfully Processed. [View Receipt](#) [Email Receipt](#)

Advance Renewal Date
 Renewal Prepayments
 Prepayments

Existing Payments in Batch# 1330:

Bill-To Invoice	Name	Method	Reference	Service Date	Amount Unapplied						
100205	MULTIPLE	Frye, Kaylee	VISA	*****1111	09/01/2010	\$209.00	\$0.00	[Edit]	[Delete]	[View Receipt]	[Email Receipt]
						\$209.00	\$0.00				

In PestPac, the payment will show as a Web Payment and will be applied to the invoices the customer specified within the EPay system.

Ace Pest Control

My Account

Wednesday, September 1, 20



pay for a service

Account #: 100204

Please select the invoices you would like to pay:

Pay Date	Invoice	Description	Balance
<input type="checkbox"/> 09/01/2010	11430	RATS & MICE	51.00

Please select the renewals you would like to pay:

Pay Date	Description	Amount
<input checked="" type="checkbox"/> 09/01/2010	Residential Monthly Service	636.00

Payment Amount: \$636.00

Name on Card:

Jayne Cobb

Card Type:

Visa

NEXT



SPECIAL OFFER

Try our rats & mice service!

[Click here](#) to have a sales representative contact you about this special offer

If a customer has any Renewals due, they can also pay for these using EPay. Currently, you can not send customers an EPay notice if they only have a Renewal due, but if they do have a Renewal due and received an EPay notice for an Invoice due, the Renewal will display on the same screen as shown above.

Payment Entry Exit

Invoice: ... Bill-To: 100204 Payment Date: 09/01/2010 Cobb, Jayne
 Method: VISA Reference: *****1111 Amount: 636.00 Bill-To Balance: \$51.00
 Unapplied: 636.00 Service: GL Code: DEFAULT Last Payment: 09/01/2010 \$1,499.16
 Batch Amount: 0.00 \$-636.00 over entered batch amount. Save Cancel
[Training for this Screen](#)

Credit Cards
(No Credit Cards on file)
[Use a New Card](#)

Credit Card Successfully Processed. [View Receipt](#) [Email Receipt](#)

Advance Renewal Date
 Renewal Prepayments

Pay	Location	Service	Description	Renewal Date	Expiration Date	Cancel Date	Total
<input checked="" type="radio"/>	100204	RESIDENTIAL	Residential Monthly Service	09/01/2010			636.00

Advance Renewal Date 12 Months
 Create Invoice
 Invoice Date: 9/1/2010
 Create Service Order
 Order Type: Production
 Work Date:
 Work Time: AM
 Duration: 00:00
 Time Range:
 Color:

	Bonus	Share	None
Tech1:	0.00	1.000	<input type="checkbox"/>
Tech2:	0.00	0.000	<input type="checkbox"/>
Tech3:	0.00	1.000	<input type="checkbox"/>
Sales1:	0.00	1.000	<input type="checkbox"/>
Sales2:	0.00	1.000	<input type="checkbox"/>

Prepayments

Existing Payments in Batch# 1332:

Bill-To	Invoice Name	Method	Reference	Service Date	Amount Unapplied	
100204	Cobb, Jayne	VISA	*****1111	09/01/2010	\$636.00 \$0.00	[Edit] [Delete] [View Receipt] [Email Receipt]
					\$636.00 \$0.00	

After the payment has been processed, the payment will be in a batch indicating it is a Web Payment and a Renewal PrePayment. You may edit the Renewal payment as normal and advance the renewal date and/or create the service order for the Renewal.

EPay

This concludes the EPay Tutorial. If you have additional questions, please contact the office at 800-762-0301 or use the support options within the software.