



point&pay

BILLPAY MANUAL GUIDE

User Edition

Welcome to point&pay



Point & Pay is one of the fastest growing companies in the payments industry and we welcome you as our newest partner. We are confident that your organization will quickly reap the benefits of doing business with us and promise to provide an unparalleled level of service and support to both your staff and customers.

We are pleased to present you with this BillPay User Training Manual, User Edition. This training manual has been designed by the Point & Pay Customer Support Team and will provide you with information and guidance as you learn to use your online payment portal.

As always, should you have any questions or concerns, please reach out to the Point & Pay Customer Support Team **agencysupport@pointandpay.com**.

Table of Contents



SECTION	PAGE
Logging In / Logging Out	4-6
Customer BillPay	7-12
Turn On & Edit Recurring Payment	13-18
Setting Up Installment Payments.....	19-25
Turn On Paperless Billing	26-29
Setting Up SMS & Text2Pay	30-33

Logging In/Logging Out

Logging In / Logging Out

The screenshot shows a web browser at the URL <https://staging.paydici.com/city-of-point-and-pay/search/landing>. The page features a blue header with a "SIGN IN / REGISTER" link. A green arrow labeled "1" points to the "CITY OF POINT & PAY" logo in the top left. The main content area includes a "Welcome" message, contact information, and search buttons for Taxes, Utilities, and another category. On the right, a "Sign In" form is displayed with fields for "EMAIL ADDRESS" and "PASSWORD", a "Remember Me" checkbox, a "Forgot password?" link, and a "Sign In" button. A green circle labeled "2" points to the "Sign In" button. Below the "Sign In" button, the text "Don't have an account? Create one" is circled in green. At the bottom of the form, there are buttons for "Sign in with Facebook" and "Sign in with Google".

Step 1: To log in, navigate to the BillPay URL created for your organization.

Step 2: Enter your email address and password.

If you do not have an account, you can create one by selecting *either option*: **Create one**, **Sign in with Facebook** or **Sign in with Google** from your billpayer homepage.

The screenshot shows a web browser at the URL <https://staging.paydici.com/city-of-point-and-pay/manager>. The page header includes a welcome message and the user's role: "Manager at City of Point & Pay". A green gear icon in the top right corner is highlighted with a green circle and an arrow pointing to a dropdown menu containing "Account Settings", "Support", and "Log Out". The main content area is titled "Search Accounts" and features a search form with a "Parcel ID" dropdown, a text input field for the parcel number, and a "Search" button. The footer contains links for "Support", "Terms & Conditions", "Accessibility Policy", "Privacy Policy", "Select Language", and "© 2023 Point & Pay".

Step 3: To log out, select the **Gear** icon in the upper right-hand corner of the screen, then select **Log Out**.

Throughout the rest of this manual the information will be presented as logged in.

Paying a Bill

The screenshot displays the City of Point & Pay BillPay website. The URL in the browser is <https://staging.paydici.com/city-of-point-and-pay/search/landing>. The page features a blue header with a search icon and a 'SIGN IN / REGIS' link. The main content area includes a 'Welcome' message, a search bar, and three search options: 'Search for Taxes', 'Search for Utilities', and 'Search for Court Cases'. A red box highlights these three options, with a green arrow labeled '2' pointing to it. A green circle labeled '1' points to the top navigation bar. To the right is a 'Sign In' form with fields for email address and password, and options for social login (Facebook, Google).

Step 1: To view and/or pay your utility or property tax bill, go to the **Web URL** assigned to your organization.

Step 2: You can search which bill you would like to pay, or if you already have an account, you can also sign in to view/pay your bill.

The screenshot displays the City of Point & Pay BillPay interface. At the top right, there is a 'SIGN IN / REC' link. On the left, the City of Point & Pay logo is visible, along with contact information: City of Point & Pay, (888) 891-6064, support@pointandpay.com, Hours: 24/7, and https://www.pointandpay.com/. Below the logo, there are three search options: 'Search for Taxes' (selected), 'Search for Utilities', and 'Search for Court Cases'. A green circle with the number '3' and a downward arrow points to the search input field. The search input field contains 'Parcel ID' and the value '7', with a 'Search' button to its right. Below the search field, the text 'Search results for account id: *7*' is displayed. The search results show 'Parcel #7' with '2023 Taxes' and a 'Download Bill' link. The account holder is 'Prescott Williamson' at '8343 Nec Street Salt Lake City, UT 50202'. There are three payment options: 'Other Amount Due (\$28.67)' (selected), 'Delinquent Amount Due (\$230.02)', and 'Total Amount Due (\$4,851.10)'. A green circle with the number '4' and a leftward arrow points to the 'Add To Cart' button. A 'Register Bill' button is also present.

Step 3: Search for your bill by name, parcel number, or address.

Step 4: Select the amount you would like to pay and then press **'Add To Cart'**.

The screenshot displays the 'PAYMENT' step of the BillPay process. The page title is 'Choose your method of payment'. A green circle with the number '3' points to the 'Pay with Credit Card' option, which is selected. Below this, a red-bordered form contains fields for: FIRST NAME, LAST NAME, CARD NUMBER (with VISA, Mastercard, Discover, and American Express logos), MONTH, YEAR, CVV, BILLING ADDRESS, COUNTRY (USA), ZIP CODE, CITY, STATE, EMAIL ADDRESS, and PHONE. A green circle with the number '4' points to the left sidebar containing contact information for City of Point & Pay. At the bottom of the form, a checkbox labeled 'SAVE MY PAYMENT INFORMATION (OPTIONAL)' is checked, with a green circle and arrow pointing to it. To the right, an 'Order Summary' box shows: Parcel #7 (2023 Taxes) for \$28.67, Processing Fees for \$1.00, and an ESTIMATED TOTAL of \$29.67. A green circle with the number '5' points to the 'Continue' button at the bottom of the summary box.

Step 3: After reviewing your card, you can select a **'Method of Payment'**. *Note:* Services fees will differ depending on method of payment.

Step 4: Fill out all fields.

Note: If the **'Save My Payment Information'** box is checked, this will prompt you to create an account.


Step 5: Once all fields are properly filled, select **'Continue'**.

The screenshot shows the 'REVIEW' step of the BillPay process. The interface includes a navigation bar with 'SIGN IN / REGISTER', a shopping cart icon with '\$28.67', and a 'Clear Cart' button. The main content area has a breadcrumb trail: 'CART' > 'PAYMENT' > 'REVIEW' > 'CONFIRMATION'. The 'REVIEW' step is active, showing 'Review your order details'. A green circle with the number 6 points to this heading. Below the heading, there are sections for 'Parcel #', 'Other Amount Due', 'PAYMENT METHOD', 'CONTACT INFORMATION', and 'PAYMENT DATE'. The 'Other Amount Due' is \$28.67. The 'PAYMENT DATE' section has a checkbox for 'Schedule My Payment For A Later Date', which is highlighted with a green box. On the right, there is an 'Order Summary' table with 'Subtotal' at \$28.67 and 'Processing Fees' at \$1.00, totaling \$29.67. Below the summary is a checkbox for 'I Agree to the Terms & Conditions', which is highlighted with a red box, and a blue 'Submit Payment' button, which is highlighted with a green circle and the number 7.

Step 6: Before submitting your payment, you are able to review your order details.

Note: If desired, you can also schedule your payment for a later date by checking the “schedule my payment for a later date” box.

Step 7: Once you have reviewed your information and agreeing to the terms & conditions, select **‘Submit Payment’**.



City of Point & Pay
(888) 891-6064
support@pointandpay.com
Hours: 24/7
https://www.pointandpay.com/

Point & Pay Support
support@pointandpay.com

SEARCH

→ SIGN IN / REGISTER

CART PAYMENT REVIEW CONFIRMATION

Payment Successful

Confirmation #6340204

jsmith@pointandpay.com
An email confirmation has been sent to apolizer@pointandpay.com

← 8

Print Your Confirmation

PAYMENT DATE Wednesday, November 15, 2023


TOTAL \$29.67

FEES \$1.00

Parcel # Z Other Amount Due \$28.67

8343 Nec Street Salt Lake City, UT 50202

PAYMENT METHOD

 **** * 1111

CONTACT INFORMATION

Annie Polzer
10072 12th Way N.
Saint Petersburg, FL 33716
apolzer@pointandpay.com
(920) 896-3476

Save time and paper

Register to save this account to your favorites and never miss a payment.

We have sent you an activation email. Please check your inbox to complete registration or click below.

Register now

Step 8: After your payment has been made, you will receive an email with your confirmation number.
Note: (Optional) You may also print your confirmation.

Turn On & Edit Recurring Payments

Turn On & Edit Recurring Payments

The screenshot shows a web browser at the URL <https://staging.paydici.com/city-of-point-and-pay/search/landing>. The page features the City of Point & Pay logo, a search bar, and contact information. A 'Welcome' message is displayed, along with buttons for 'Search for Taxes', 'Search for Utilities', and 'Search for'. On the right, a 'Sign In' form is visible, containing fields for 'EMAIL ADDRESS' and 'PASSWORD', a 'Remember Me' checkbox, a 'Forgot password?' link, and a 'Sign In' button. A green circle highlights the 'Create one' link below the 'Sign In' button.

Step 1: To log in, navigate to the URL created for your organization.

Step 2: Enter your email address and password. (This is created for you during the onboarding process)
Note: **Create one**, **Sign in with Facebook** and **Sign in with Google** are only available to create/login.

Turn On & Edit Recurring Payments

The screenshot shows the City of Point & Pay website interface. On the left is a navigation sidebar with the city logo and menu items: DASHBOARD, HISTORY, SEARCH, and ACCOUNT SETTINGS. Below the menu is contact information for the City of Point & Pay and Point & Pay Support. The main content area is titled 'Search for your Taxes using the options below' and features three search buttons: 'Search for Taxes' (selected), 'Search for Utilities', and 'Search for Court Cases'. A green circle with the number '3' and a downward arrow points to the search input field. The search criteria is set to 'Parcel ID' with the value '3'. A blue 'Search' button is to the right. Below the search bar, the results are for account ID '3'. The bill details include: Parcel #3, 2025 Taxes, Suki Pitts, 6282 Imperdiet Road Atlanta, GA 25073-0462, and a 'Download Bill' link. The amount due is \$26.92, with a total amount due of \$2,280.87. A red box highlights the 'Add To Dashboard' button, with a green circle and arrow labeled '4' pointing to it. The 'Add To Cart' button is also visible.

Step 3: Search for your bill by name, parcel number, or address.

Step 4: Select **'Add to Dashboard'**.

Turn On & Edit Recurring Payments

The screenshot displays the City of Point & Pay dashboard. On the left is a navigation sidebar with the following items: a home icon labeled 'DASHBOARD', a clock icon labeled 'HISTORY', a magnifying glass icon labeled 'SEARCH', and a gear icon labeled 'ACCOUNT SETTINGS'. Below these is contact information for the City of Point & Pay, including the phone number (888) 891-6064, email support@pointandpay.com, 24/7 hours, and website URL https://www.pointandpay.com/. At the bottom of the sidebar is 'Point & Pay Support' with email support@pointandpay.com. A green circle with the number '5' and a left-pointing arrow highlights the 'DASHBOARD' link.

The main content area is titled 'Dashboard' and shows details for 'Parcel #7' at '8343 Nec Street Salt Lake City, UT 50202'. Below this is a '2023 Taxes' section with a 'View Payment Options' button. A tax amount of '\$4,851.10' is displayed. At the top right, there are two toggle switches: 'PAPERLESS' (set to 'No') and 'RECURRING PAYMENTS' (set to 'Off'). A red box highlights the 'RECURRING PAYMENTS' toggle, and a green circle with the number '6' and an upward-pointing arrow highlights this toggle.

At the bottom of the dashboard, there are links for 'Support', 'Terms & Conditions', 'Accessibility Policy', and 'Privacy Policy', along with the copyright notice '© 2023 Point & Pay'.

Step 5: Go to your **‘Dashboard’**.

Step 6: Turn on **‘Recurring Payments’**.

Turn On & Edit Recurring Payments

Step 7: Choose the amount you would like to pay. Next, click **'Add New Payment Method'**.

Step 8: Select when the recurring payments will start. Click in the **'I'd Like My Payments To Start On'** field to open the calendar.

Step 9: Before saving, you must agree to the terms & conditions

The screenshot shows the 'Recurring Payments' configuration page for the City of Point & Pay. The page includes a sidebar with navigation options: DASHBOARD, HISTORY, SEARCH, and ACCOUNT SETTINGS. The main content area is titled 'Recurring Payments' and contains the following sections:

- TOTAL PAYMENT AMOUNT:** Radio buttons for 'Other Amount Due', 'Delinquent Amount Due', 'Total Amount Due', and 'Pay an Exact Amount' (selected). A text input field shows '\$0.00'.
- PAYMENT METHOD:** A green callout '7' points to the '+ Add New Payment Method' button.
- PAYMENT START DATE:** A text input field shows 'Thu Nov 16th 2023'.
- PAYMENT FREQUENCY:** Two dropdown menus are set to 'monthly' and 'every 1 month'.
- REPEAT ON:** A dropdown menu is set to 'The 16th of the month'. A green callout '8' points to this dropdown.
- Preview:** A box titled 'My next four recurring payments will occur on:' lists dates: Thursday, November 16th 2023; Saturday, December 16th 2023; Tuesday, January 16th 2024; and Friday, February 16th 2024.
- Agreement:** A checkbox labeled 'I Agree To The Terms & Conditions' is highlighted with a red box. A green callout '9' points to this checkbox.
- Buttons:** 'Save Recurring Payments' and 'Cancel' buttons are at the bottom.

Turn On & Edit Recurring Payments

The screenshot displays the City of Point & Pay dashboard. On the left is a navigation sidebar with the city logo and menu items: DASHBOARD, HISTORY, SEARCH, and ACCOUNT SETTINGS. The main content area is titled 'Dashboard' and shows details for 'Parcel #7' at 8343 Nec Street Salt Lake City, UT 50202, with an auto-scheduled payment for November 16th, 2023. A '2023 Taxes' summary card shows an amount of \$4,851.10 and a 'View Payment Options' button. At the top right, there are toggle switches for 'PAPERLESS' (set to 'No') and 'RECURRING PAYMENTS' (set to 'On'). On the far right, the account balance is \$4,851.10, and a 'More Actions' dropdown menu is open, with 'Edit recurring payments' highlighted. A red box highlights the 'RECURRING PAYMENTS' toggle, and another red box highlights the 'Edit recurring payments' option in the dropdown menu.

‘Recurring Payments’ has been turned on successfully.

To edit ‘Recurring Payments’ information **click the three dots** and a drop down menu will appear

Setting Up Installment Payments

Setting Up Installment Payments

The screenshot shows a web browser at the URL <https://staging.paydici.com/city-of-point-and-pay/search/landing>. The page features the City of Point & Pay logo, a search bar, and contact information. A 'Welcome' message is displayed, along with buttons for 'Search for Taxes' and 'Search for Utilities'. On the right, a 'Sign In' form is visible, containing fields for 'EMAIL ADDRESS' and 'PASSWORD', a 'Remember Me' checkbox, a 'Forgot password?' link, and a 'Sign In' button. A green circle highlights the 'Create one' link next to the 'Sign In' button.

Step 1: To log in, navigate to the URL created for your organization.

Step 2: Enter your email address and password. (This is created for you during the onboarding process)
Note: **Create one**, **Sign in with Facebook** and **Sign in with Google** are only available to create/login.

Setting Up Installment Payments

The screenshot shows the Point & Pay user interface. On the left is a navigation sidebar with the City of Point & Pay logo and menu items: DASHBOARD, HISTORY, SEARCH, and ACCOUNT SETTINGS. Below the menu is contact information for the City of Point & Pay. The main content area is titled 'Search for your Taxes using the options below' and features three search options: 'Search for Taxes' (selected), 'Search for Utilities', and 'Search for Court Cases'. A green circle with the number '3' points to the search input field where '3' has been entered. Below the search bar, the results for account id '3' are displayed. A table shows details for Parcel #3, including the owner's name (Suki Pitts) and address. To the right of the table, there are radio buttons for 'Other Amount Due (\$26.92)', 'Delinquent Amount Due (\$135.61)', and 'Total Amount Due (\$2,280.87)'. A dark 'Add To Cart' button is located below these options. A red box highlights the 'Add To Dashboard' button, with a green circle and arrow labeled '4' pointing to it.

Step 3: Search for your bill by name, parcel number, or address.

Step 4: Select 'Add to Dashboard'.

Setting Up Installment Payments

The screenshot shows the Point & Pay dashboard for a user. On the left is a navigation sidebar with links for DASHBOARD, HISTORY, SEARCH, and ACCOUNT SETTINGS. The main content area displays 'Dashboard' for 'Parcel #7' at '8343 Nec Street Salt Lake City, UT 50202'. A '2023 Taxes' section shows an amount of '\$4,851.10' and a 'View Payment Options' button. To the right, there are toggle switches for 'PAPERLESS' (set to 'No') and 'RECURRING PAYMENTS' (set to 'Off'). On the far right, the 'BALANCE' is '\$4,851.10'. A 'More Actions' dropdown menu is open, showing options: 'Set up Installments', 'Remove from Dashboard', and 'View History/Activity'. A red box highlights the 'Set up Installments' option, and a green circle with the number '5' and an arrow points to it.

Step 5: Click the three dots and a drop down menu will appear. Select **'Set up Installments'**.

City of Point & Pay
EST. 1999

DASHBOARD
HISTORY
SEARCH
ACCOUNT SETTINGS

City of Point & Pay
(888) 891-6064
support@pointandpay.com
Hours: 24/7
<https://www.pointandpay.com/>

Point & Pay Support
support@pointandpay.com

Set Up Installments

TOTAL PAYMENT AMOUNT **6**

\$4,851.10

SELECT NUMBER OF PAYMENTS: 2 payments

PAYMENT FREQUENCY: Month

PAYMENT START DATE: Thu Nov 16th 2023

PAYMENT METHOD

Credit card (****1111) **7**

Add New Payment Method

Payments to Schedule

DATE	AMOUNT	FEES
Choose a payment method above to add payments.		

Step 6: Choose the total payment about, number of payments, frequency of payments, and start date.

Step 7: Select a 'Payment Method'.

Note: If you do not have a saved form of payment you will be need to fill out all required fields.

Step 8: Once a 'Payment Method' is selected and/or added, 'Payments to Schedule' will be displayed with the date, amount, and processing fees.

Step 9: After reviewing your information, select 'Schedule 2 Payments'

Note: Number of Payments will differ depending on your selection.

City of Point & Pay
EST. 1999

DASHBOARD
HISTORY
SEARCH
ACCOUNT SETTINGS

City of Point & Pay
(888) 891-6064
support@pointandpay.com
Hours: 24/7
https://www.pointandpay.com/
Point & Pay Support
support@pointandpay.com

Set Up Installments

TOTAL PAYMENT AMOUNT
\$4,851.10

SELECT NUMBER OF PAYMENTS: 2 payments
PAYMENT FREQUENCY: Month

PAYMENT START DATE
Thu Nov 16th 2023

PAYMENT METHOD
 Credit card (****1111)
[Add New Payment Method](#)

Payments to Schedule

	DATE	AMOUNT	FEES	
1	Thu Nov 16th 2023	\$2,425.55	\$53.12	⊗
	Sat Dec 16th 2023	\$2,425.55	\$53.12	⊗

Schedule 2 Payments Cancel

Setting Up Installment Payments

History

Filter by Account #

ACCOUNT ACTIVITY 3 **STATEMENTS** 1

You have until 11:59 PM (Eastern Standard Time) on the day before the scheduled payment date to cancel the payment.

Filter by Order Status

DATE	ACCOUNT #	PAYMENT	TOTAL	STATUS
Dec 16, 2023	7	**** 1111 by Annie Polzer	\$2,478.67	SCHEDULED
Nov 16, 2023	7	**** 1111 by Annie Polzer	\$2,478.67	SCHEDULED

Support Terms & Conditions Accessibility Policy Privacy Policy Select Language ▼ © 2023 Point & Pay

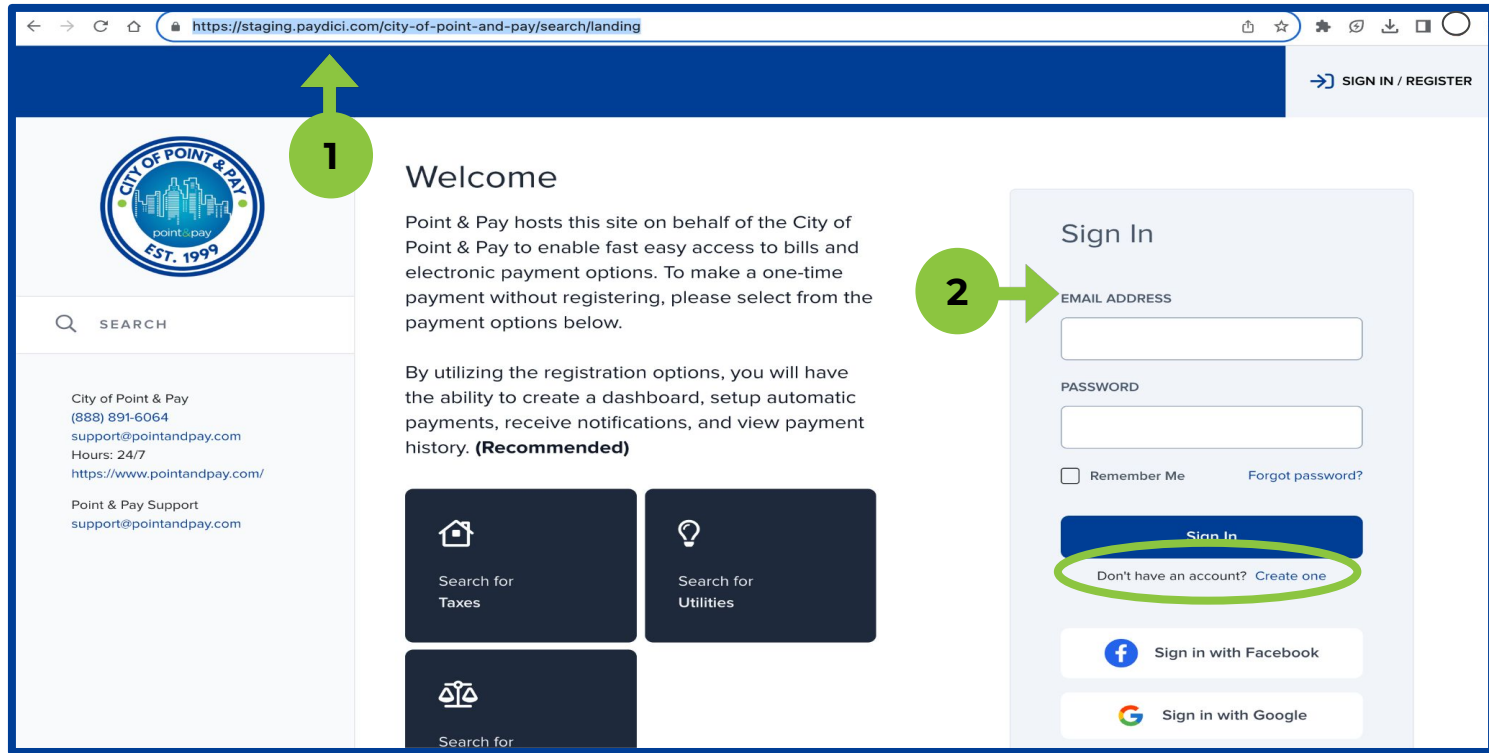
Installment Payments can be viewed and canceled under your **'Account History'**.

Note: To view more information, click the '

25

Turn On Paperless Billing

Turn On Paperless Billing



Step 1: To log in, navigate to the URL created for your organization.

Step 2: Enter your email address and password. (This is created for you during the onboarding process)
Note: **Create one**, **Sign in with Facebook** and **Sign in with Google** are only available to create/login.

Turn On Paperless Billing

The screenshot shows the City of Point & Pay website interface. On the left is a navigation sidebar with the city logo and menu items: DASHBOARD, HISTORY, SEARCH, and ACCOUNT SETTINGS. The main content area is titled 'Search for your Taxes using the options below' and features three search options: 'Search for Taxes' (selected), 'Search for Utilities', and 'Search for Court Cases'. Below these is a 'SEARCH BY' section with a dropdown menu set to 'Parcel ID' and an input field containing the number '3'. A blue 'Search' button is to the right. The search results for account ID '3' are displayed, including parcel information for Suki Pitts and a list of amounts due: 'Other Amount Due (\$26.92)', 'Delinquent Amount Due (\$135.61)', and 'Total Amount Due (\$2,280.87)'. A red box highlights the 'Add to Dashboard' button next to the total amount due.

Step 3: Search for your bill by name, parcel number, or address.

Step 4: Select **'Add to Dashboard'**.

Turn On Paperless Billing

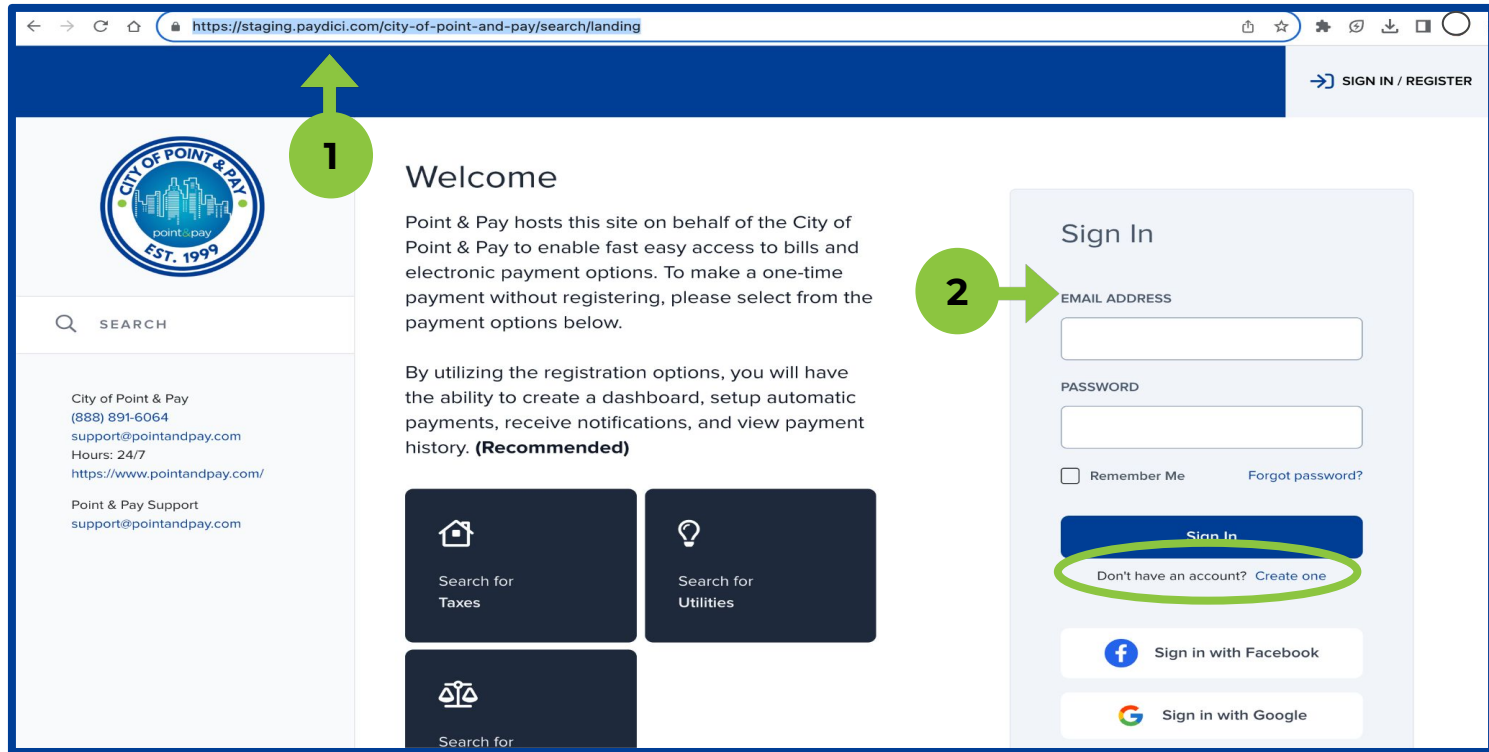
The screenshot shows the Point & Pay dashboard for a user. On the left is a navigation menu with options: DASHBOARD, HISTORY, SEARCH, and ACCOUNT SETTINGS. The main content area is titled 'Dashboard' and displays information for 'Parcel #7' at 8343 Nec Street Salt Lake City, UT 50202. It shows '2023 Taxes' with an amount of '\$4,851.10' and a 'View Payment Options' button. On the right, there are controls for 'RECURRING PAYMENTS' (set to 'off') and 'PAPERLESS' (set to 'Yes'). The 'PAPERLESS' toggle is highlighted with a red box, and a green arrow with the number '5' points to it. Below the arrow is a green circle containing the number '5'. At the top right, there is a 'More Actions' dropdown and a 'BALANCE \$4,851.10' section with 'Installments ON'.

Step 5: Click the ‘Paperless’ option.

Note: After selecting the option, you will be directed to an ‘Authorization and Agreement’ page. Once confirmed, ‘Paperless Billing’ will be activated.

Setting Up SMS & Text2Pay

Setting Up SMS & Text2Pay



Step 1: To log in, navigate to the URL created for your organization.

Step 2: Enter your email address and password. (This is created for you during the onboarding process)
Note: **Create one**, **Sign in with Facebook** and **Sign in with Google** are only available to create/login.

The screenshot shows the Point & Pay dashboard. On the left is a sidebar with navigation options: DASHBOARD, HISTORY, SEARCH, and ACCOUNT SETTINGS. Below these are contact details for the City of Point & Pay. The main content area is titled 'Dashboard' and contains the text 'You have no claimed accounts. Claim an account here.' At the bottom of the main area are links for Support, Terms & Conditions, Accessibility Policy, Privacy Policy, and a copyright notice for 2023 Point & Pay. On the right side of the dashboard, a dropdown menu is open, showing 'More Actions' at the top, 'Add a phone number for SMS', and 'Account Search'. A green circle with the number '3' and an arrow points to the 'Add a phone number for SMS' option. The 'More Actions' button is highlighted with a red box.

Step 3: Once on your account **'Dashboard'**, click **'More Actions'** and select **'Add a phone number for SMS'**.
Note: To successfully add a phone number you are required to agree to the terms and conditions.

The screenshot shows the Point & Pay dashboard interface. On the left is a navigation sidebar with the City of Point & Pay logo and menu items: DASHBOARD, HISTORY, SEARCH, and ACCOUNT SETTINGS. The main content area is titled 'Dashboard' and contains the text 'You have no claimed accounts. Claim an account here.' Below this are links for Support, Terms & Conditions, Accessibility Policy, Privacy Policy, and a copyright notice for 2023 Point & Pay. On the right side, there is a 'More Actions' dropdown menu with options for 'Add a phone number for SMS' and 'Account Search'. A modal window titled 'SMS and Text2Pay Notifications' is open in the center, prompting the user to 'Enter your mobile number for SMS notifications.' The modal contains a 'MOBILE NUMBER' label, a text input field with the value '(800)867-5309', a green circle with the number '4' and a green arrow pointing to a blue 'Submit' button, and a 'Cancel' link below the button.

Step 4: Enter a mobile phone number and click **'Submit'**.



**Thank
You!**

point&pay