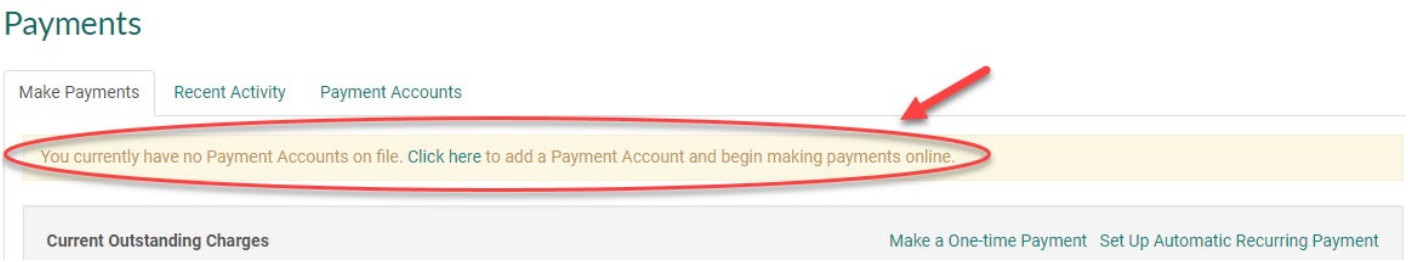
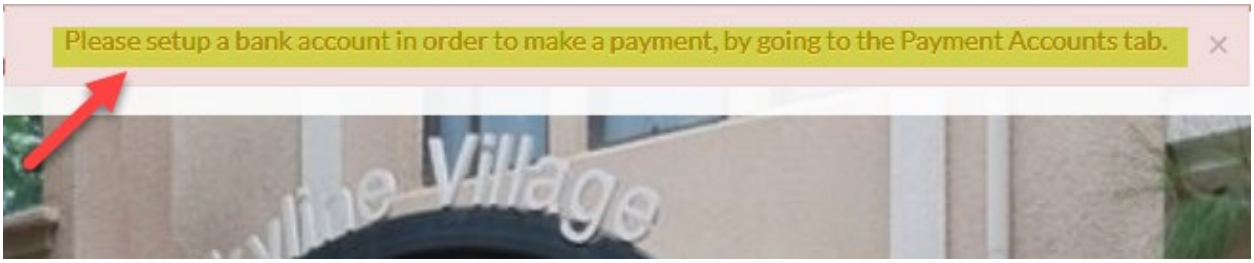
Resident Portal Payments How To Guide

RESIDENT PORTAL PAYMENTS:

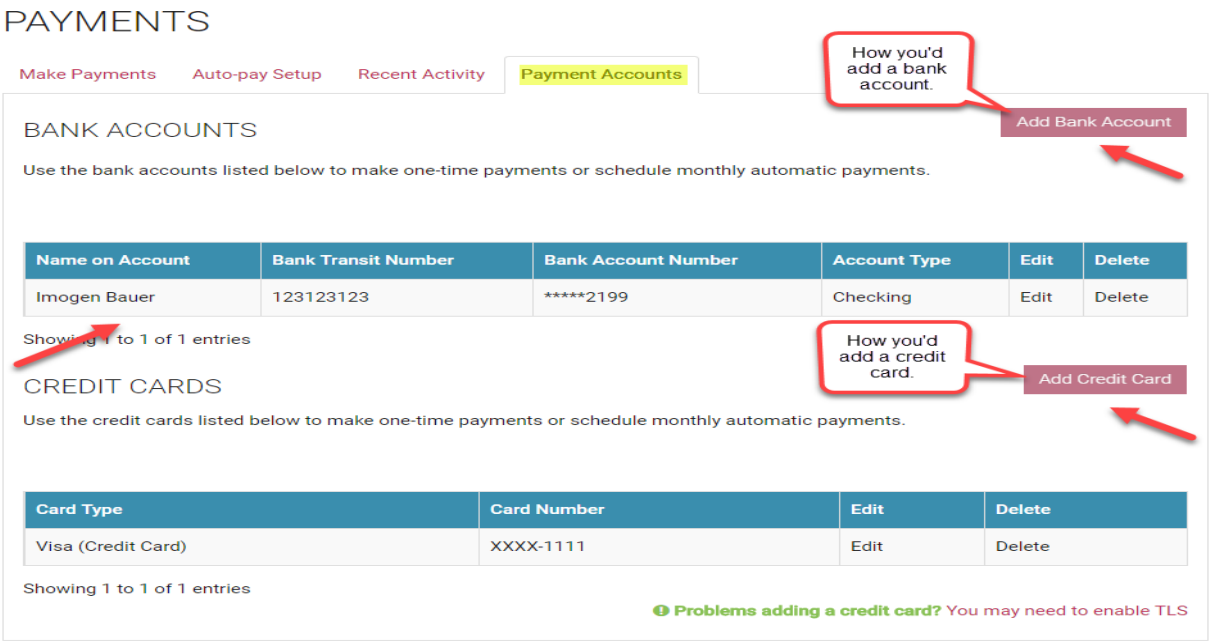
If a resident has not added a Payment Account in the past to either Setup Auto-Pay or make One-Time Payments then the resident will see this note once they log into the Payments section of the Resident Portal:



If the resident tries to click the “Make a One-time Payment or Set Up Automatic Recurring Payment” link and disregards the note without clicking the “click here” link within the note, it’ll generate an error message that will remind them to set up a bank account to proceed with a payment:

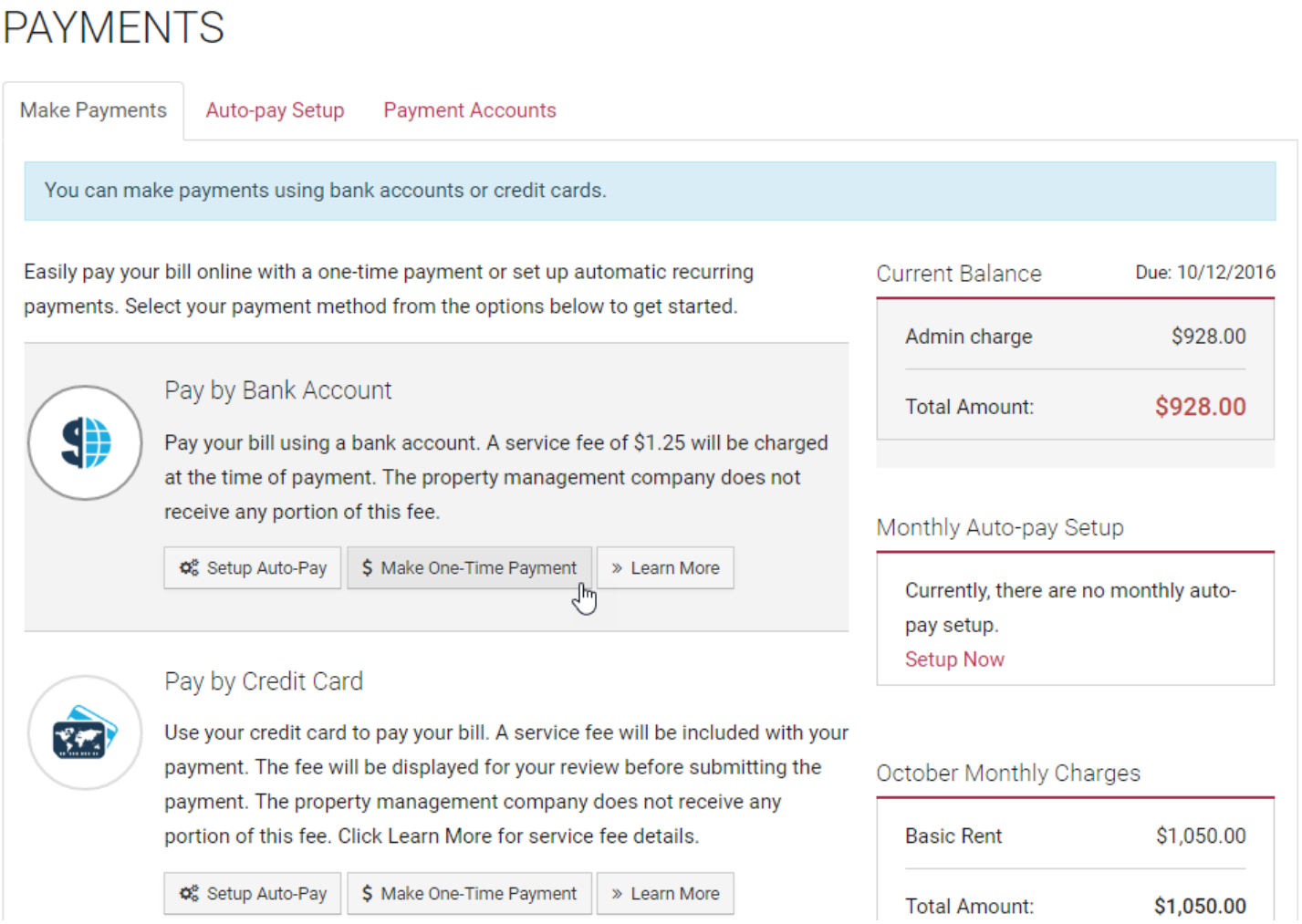


When the resident is setting up their Bank Account, they can either click the “Click here” link within the note or click on the “Payment Accounts” tab and click on the Add Bank Account or Add Credit Card button. From this screen the resident can view all bank accounts and credit cards they have set up as payment accounts:



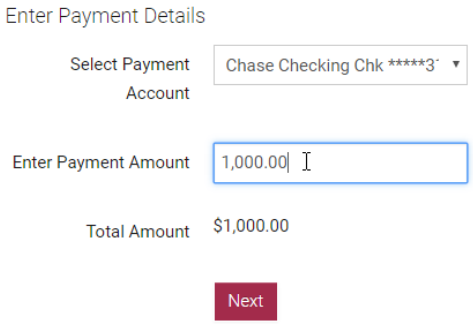
Make Payments tab:

Once on the Payments page in the Resident Portal, the “Make Payments” tab will be the default tab you see. Here you can view your Current Balance and Monthly Auto-Pay Setup/Charges. There will also be two buttons/links on this page for Setup Auto-Pay and Make One-Time Payment:

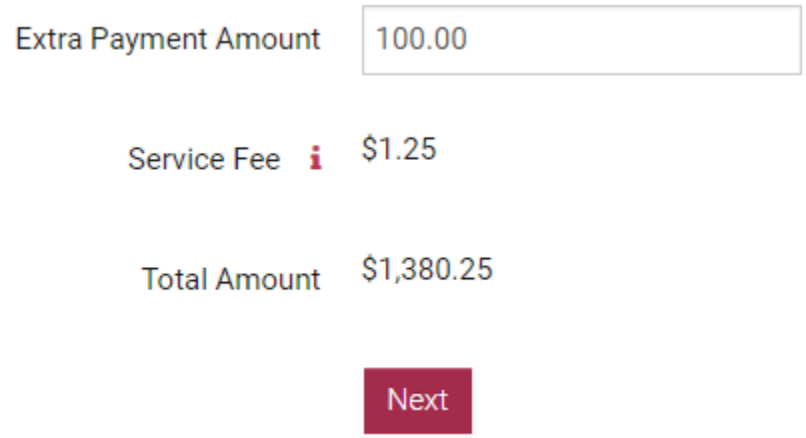


- <u>One-Time Payment:</u>
  If you're making a one-time bank account or credit card payment, you will click the one-time payment option and be prompted to select the Payment Account and enter the amount you're paying in Payment Details:

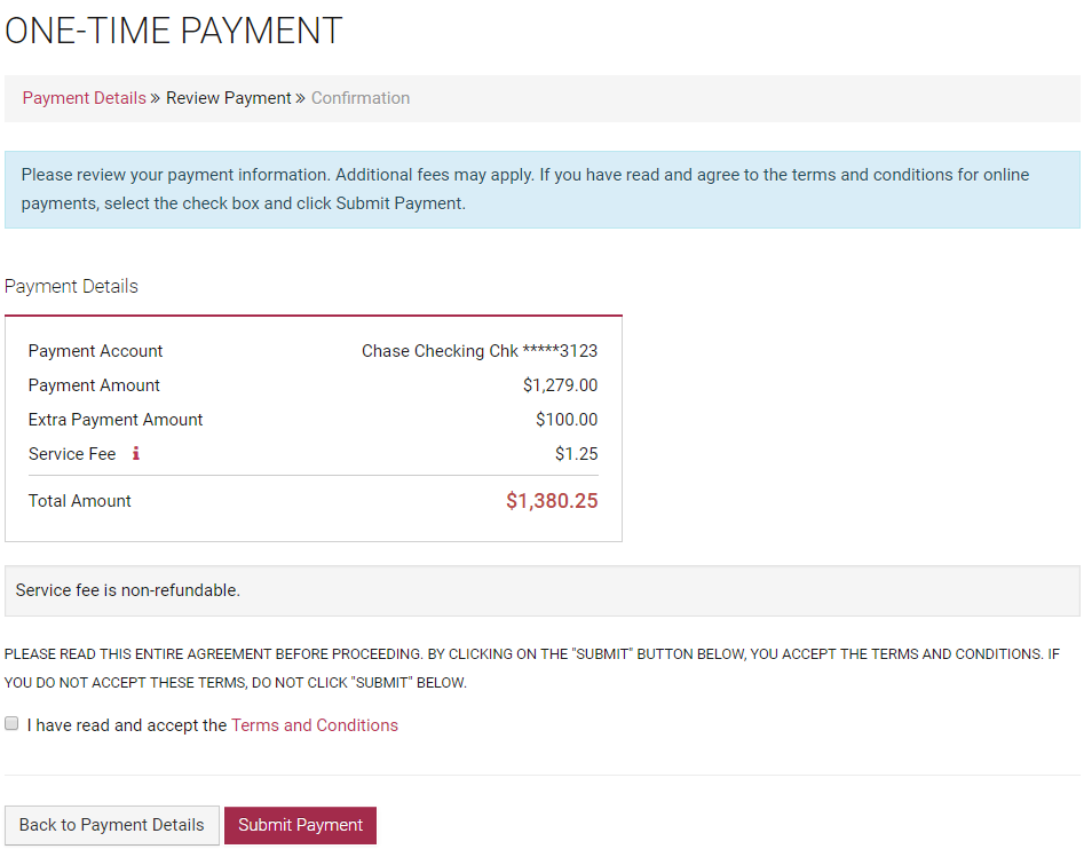
Date	Description	Amount
5/7/2015	Deposit	$200.00
5/7/2015	Rent for 30 days	$1,006.00
5/7/2015	Storage Unit for 30 days	$24.00
5/7/2015	Additional Parking Spot for 30 days	$34.00
5/7/2015	Air Conditioning	$15.00
	Account Balance	$1,279.00



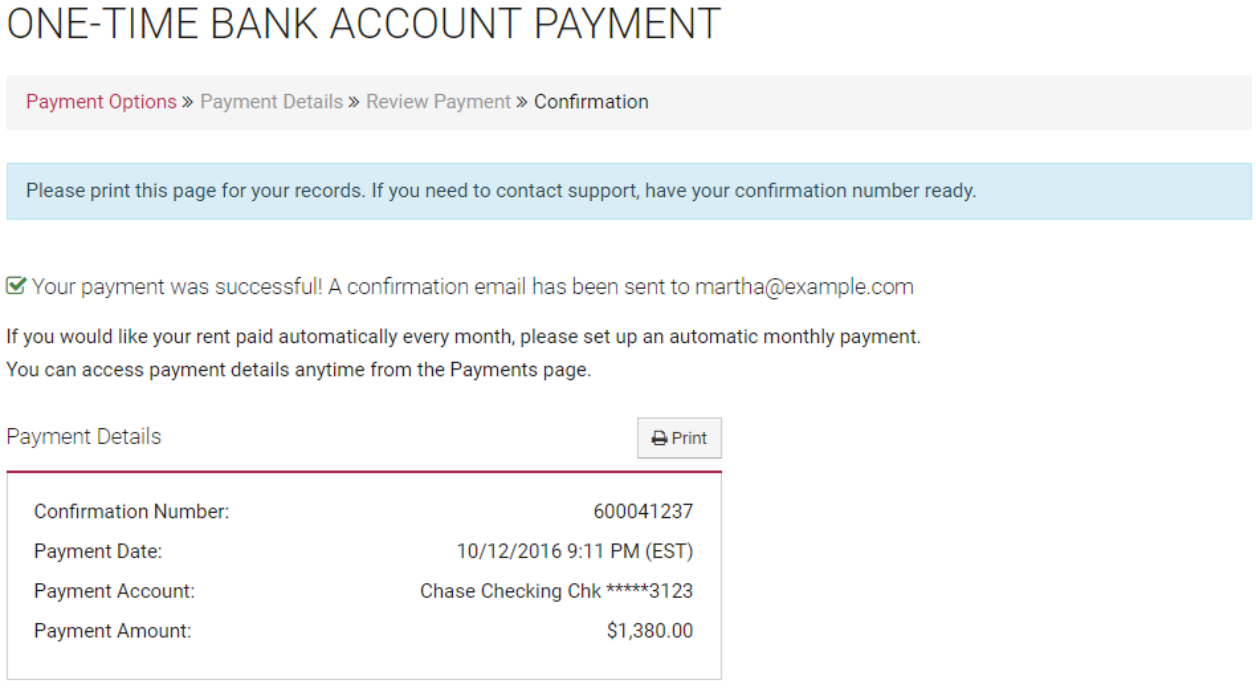
If there's a Service Fee applied to the payment, the fee amount is displayed and added to the **Total Amount**:



The next page is where the resident Reviews Payment. Here they review their payment details and accepts the terms and conditions for online payments before submitting their payment. A message that the service fee is non-refundable appears below the payment details.

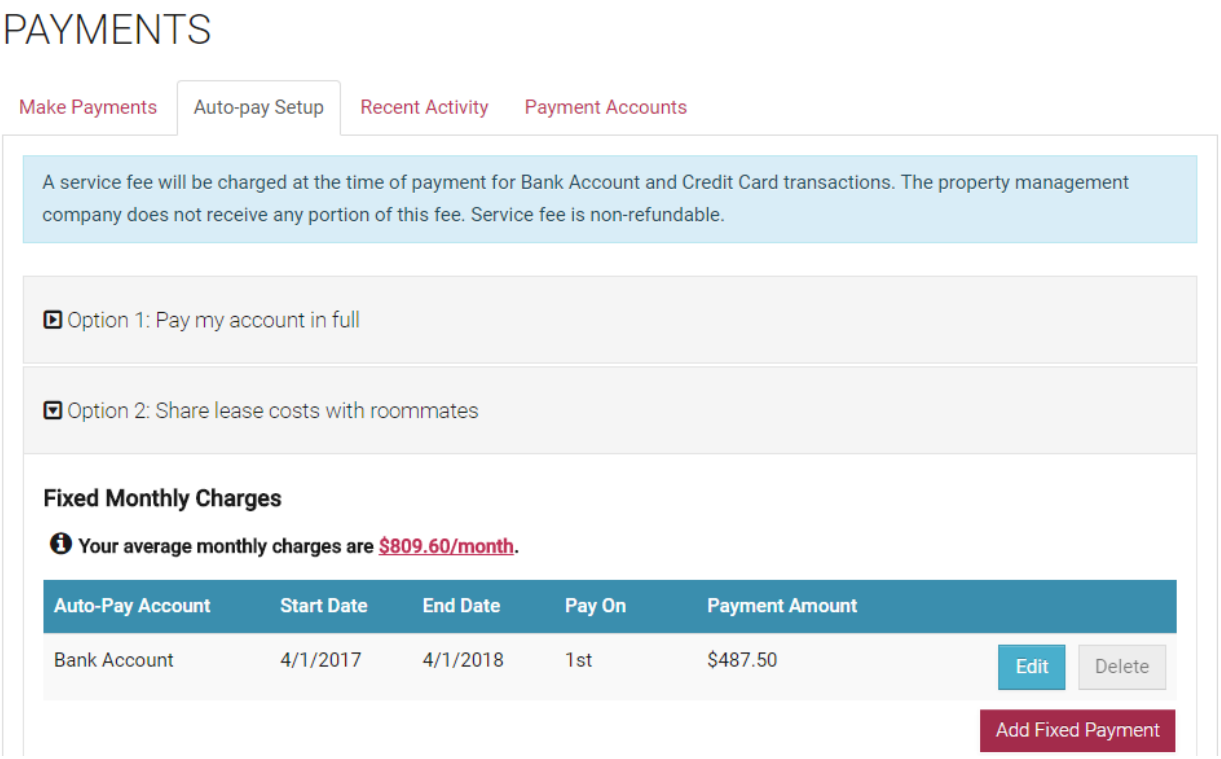


The next page is the Confirmation that the resident receives if their payment was successful and it also displays the payment details again. They will receive a confirmation e-mail to their e-mail address. If they would like to print the Payment Details, there is a printer icon that they can click:

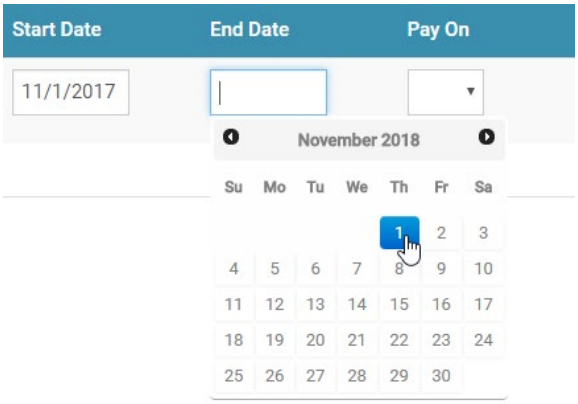


<u>Setup Auto-Pay:</u>

Auto-Pay is for recurring payments of monthly charges that have the same amount each month such as monthly rent. In the Fixed Monthly Charges section, the resident can enter in detail about their payments or fix these details by clicking Edit:

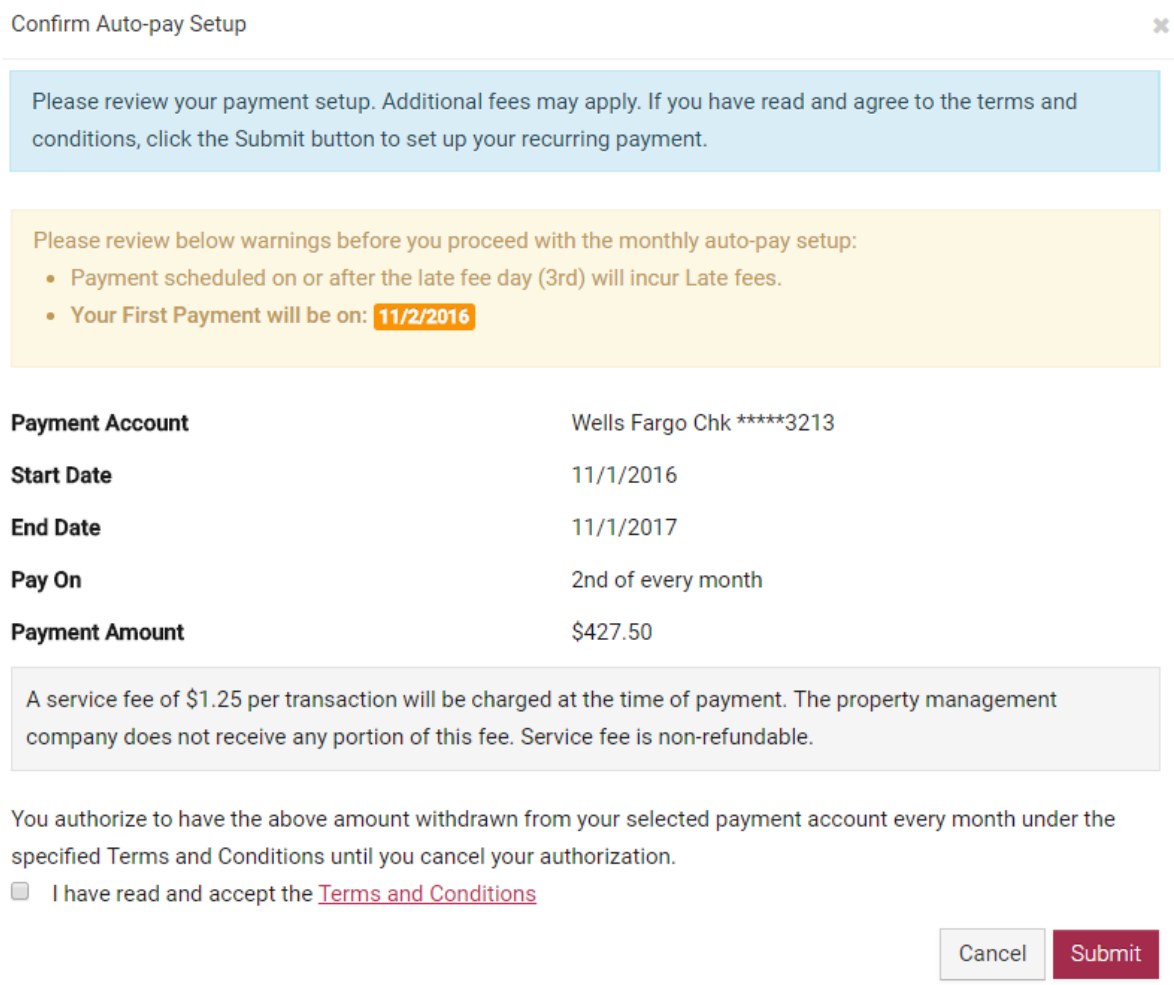


- Details include the resident choosing what payment account they would like to use for the Auto-Pay account.
- The Start and End Dates define when the payment will be active.



- The Pay on Day is the day of the month that the resident wants RENT*Café* to process the payment.

The resident can then review their payment details and accept the terms and conditions for online payments before setting up their payment:



- Late Payment - If the payment will be late, a message appears informing the resident that they might incur late fees on the payment with the current payment day. To avoid incurring late fees on the payment, the resident should click **Cancel** and set up an earlier payment day
- If the resident changes their mind about setting up payment, they can press the Cancel button and their details will be discarded
- The Auto-Pay Setup Confirmation page is where the resident will receive confirmation that their setup was successful and a confirmation e-mail has been sent to their e-mail address.

Auto-pay Setup Confirmation

MONTHLY AUTO-PAY SETUP FOR LEASE CHARGES CONFIRMED

You have successfully set up a recurring payment for your fixed monthly charges. The amount that you entered will automatically be paid every month. You can edit the amount any time before the scheduled payment date.

Thank you for setting up your automatic monthly payment!

Your first payment will be on 11/2/2016. Please note that any outstanding balances prior to this date must be paid using the one-time payment option.

You can access your payment details anytime from Payment Menu.

A confirmation email has been sent to martha@example.com.

Recent Activity tab:

Here a resident can review their ledger.

PAYMENTS

Make Payments | Auto-pay Setup | Recent Activity | Payment Accounts

Online payments are reflected as Pending until they are fully processed.

10 records per page

Search:

Date	Payments and Charges	Charge	Payments	Balance
2/28/2017	gas bill	$30.00	$0.00	$0.00
2/24/2017	Online Payment - EFT Payment. [Payment Pending]	$0.00	$600.00	-$30.00
2/21/2017	Online Payment - EFT Payment. [Payment Pending]	$0.00	$30.00	$570.00
2/13/2017	Online Payment - EFT Payment Paid by roommate SeanGarcia (r0002660) [Payment Pending]	$0.00	$600.00	$600.00
2/2/2017	Rent- Residential	$1,200.00	$0.00	$1,200.00
1/18/2017	Rent- Residential	$750.00	$0.00	$0.00
1/18/2017	Administration Fee	$25.00	$0.00	-$750.00
1/18/2017	Online Payment - EFT Payment. [Payment Pending]	$0.00	$750.00	-$775.00
1/12/2017	Online Payment - EFT Payment.	$0.00	$25.00	-$25.00

Showing 1 to 9 of 9 entries

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