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PeopleSoft

PeopleSoft FSCM 9.2: PeopleSoft eBill Payment

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

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- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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Typographical Convention	*Description*
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)

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- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft FSCM Related Links

Oracle Help Center

Hosted Online Help

PeopleSoft Information Portal

My Oracle Support

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the “Understanding Keyword Search within Components ” (Application Fundamentals) topic.

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

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Chapter 1

Getting Started with PeopleSoft eBill Payment

PeopleSoft eBill Payment Business Processes

PeopleSoft eBill Payment enables customers to initiate these business processes:

- View invoices.
- Edit account information.
- Pay invoices.
- View payment information.
- Create customer conversations.
- Choose invoice delivery options.

PeopleSoft eBill Payment self-service applications, available in the Classic and Fluid user interfaces, enable customers to receive invoices, access supporting information, and make payments using the internet. Self-service applications are an improved alternative to automated telephone prompting systems, and they reduce the workload for internal support staff and customer service representatives.

PeopleSoft Fluid eBill Payment is a complete online payment center where you can pay your bills and keep track of your account – on the go – on a smartphone or any mobile device.

The Fluid eBill Payment keeps and extends Classic eBill Payment functionality, adding Quick Pay and the Message Center.

Note: To implement PeopleSoft eBill Payment, you must first set up the PeopleSoft Billing and PeopleSoft Receivables applications.

Click to watch a short video about PeopleSoft Fluid eBill Payment.

PeopleSoft eBill Payment Integrations

PeopleSoft eBill Payment sits on top of PeopleSoft Billing and PeopleSoft Receivables, so no effort is required to integrate an electronic invoice. PeopleSoft eBill Payment enables faster collection of receivables with less opportunity for errors, and it is easy to implement. Customers need not wait for an invoice, and invoices can be paid anytime, from anywhere. With PeopleSoft eBill Payment integration, you can:

- Facilitate paperless invoicing.

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- Receive invoice information from PeopleSoft Billing.
- Apply payments to PeopleSoft Receivables.
- Enable your customers to view additional information that is not on paper invoices.
- Allow customers to update their contact information, such as billing address, phone number, and credit card.

PeopleSoft eBill Payment Implementation

PeopleSoft eBill Payment does not require implementation steps. In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in *PeopleSoft Application Fundamentals* with information about where to find the most current version of each.

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Chapter 2

Preparing to Implement PeopleSoft Classic or Fluid eBill Payment

Setting Up PeopleSoft eBill Payment Security

The PeopleSoft eBill Payment transactions are set up to secure the information that is accessible to customers. For customers to use the PeopleSoft eBill Payment transactions, you must first grant those customers access to the transactions and set up appropriate row-level security for their user IDs.

To enable customers to access PeopleSoft eBill Payment pages:

1. Set up the user profile for the customer contact that requires access to eBill Payment.

   a. Select Customers, Contact Information and edit the customer contact needing access to eBill Payment (or create a new contact, as appropriate).

   b. Click the **User Profile** link at the bottom of the Contact Information page.

   c. Enter a User ID and Password. The customer contact will use these values to log into the eBill Payment application.

   d. Verify that the **Locked Out?** box is not selected.

   e. Assign the appropriate permission lists and Contact Roles to allow the user to run PeopleSoft eBill Payment processes.

      For example, you could assign the EPEB1000 permission list, which enables the user to run the Email me and Invoice Copy process. The roles that you assign to the contact determine which self-service transactions the contact has access to. You could, for example, assign the *Customer* role to customer contacts. If you are using the *Customer* role and PeopleSoft Billing is not installed, remove permission list EPEB4000 from the *Customer* role to prevent the PeopleSoft Billing links from appearing in PeopleSoft eBill Payment.

   f. Save.

2. Click the **Contact Customer Information** link to access the Contact Customer page.

   Enter the customers that are associated with the contact. The Contact Customer page contains a grid that is used to enter the customers that are associated with the contact.

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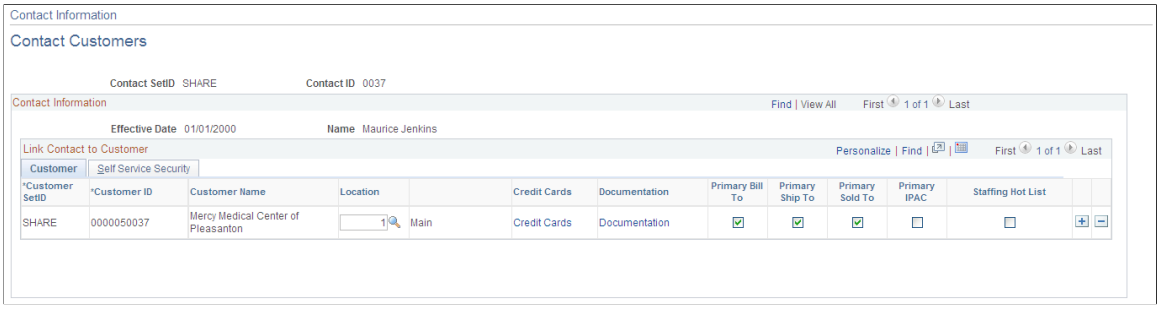
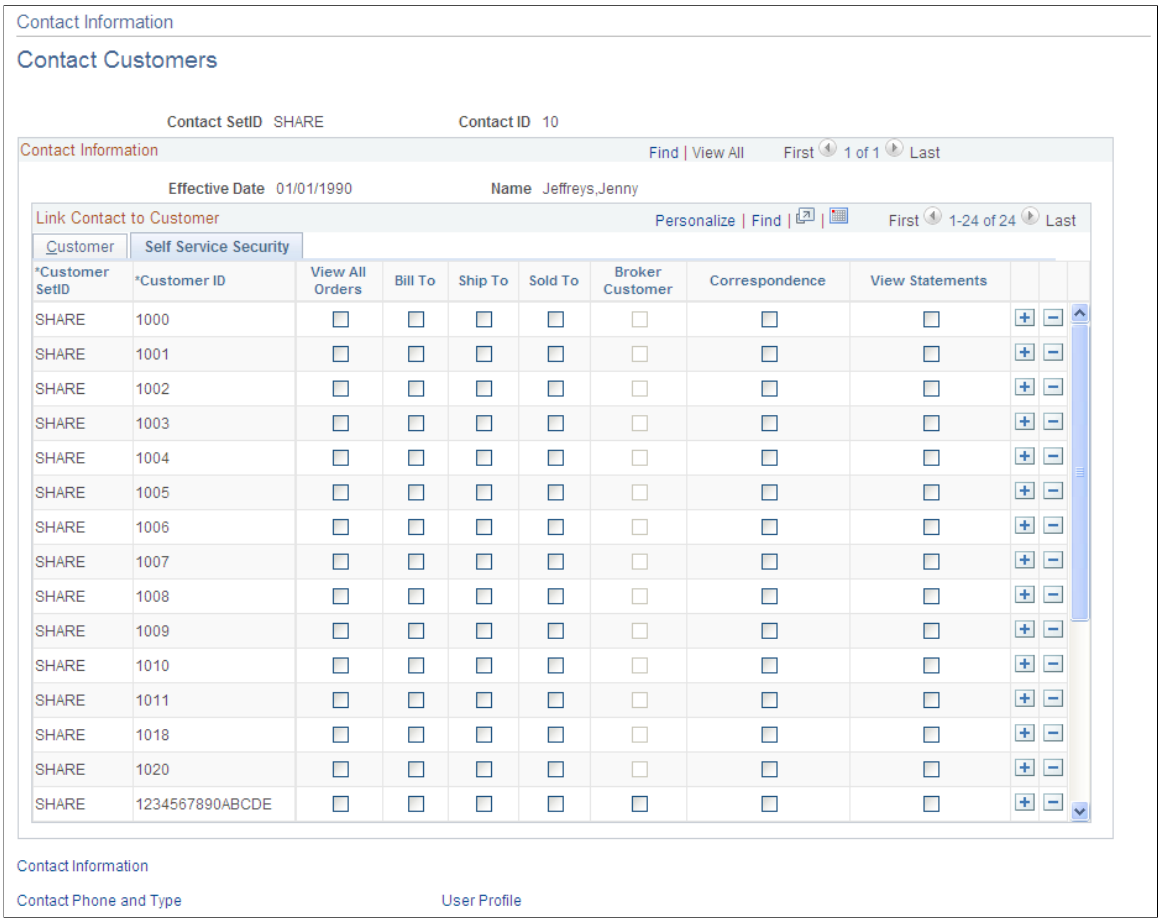
This example illustrates the fields and controls on the Contact Information - Customer tab.



3. Click the Self Service Security tab.

   Select the **Bill To** option to designate which customer data is accessible from PeopleSoft eBill Payment. When a customer contact accesses PeopleSoft eBill Payment, the system displays data for only the customers that have the **Bill To** option selected on the Self Service Security page. Row-level security is maintained in this manner for PeopleSoft eBill Payment users.

   This example illustrates the fields and controls on the Contact Information - Self Service Security tab.



4. To set up invoice delivery and notification options, click the **Documentation** link on the Customer tab for each customer.

   a. Create a row in the **Documentation** grid with a document code of *INVC* (invoice).

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b. Select the preferred communication method for invoices. The value selected will be used to derive the default value of the Invoice Media setting when a new invoice is created online or through the Billing Interface. If you want paperless invoicing, you can select *Email Notification* to have the official invoice notification delivered as an email that contains a link to view the invoice in eBill Payment.

Note: You can create the user profile on the Contact User Profile page, or you can use the PeopleTools User Profiles component. If you use the User Profiles component, select *Customer Contact* for the ID type and then assign the appropriate contact ID to the attribute value.

For additional information, see *PeopleTools: Security Administration*.

Setting Up Notifications

eBill Payment provides notifications that work in conjunction with alert options available on the Installation Options "eBill – General Page" (Application Fundamentals) and My Preferences - eBill Payment Page.

eBill Payment delivers the following notifications:

- EB_INV_DUE_PYMNT - Invoices due for payment
- EB_INV_MISSED_PYMNT - Payments missed for invoices
- EB_PYMNT_PROCESSED - Payments processed
- EB_STMT_NEW - Customer statement generation, new statement notification
- EB_STMT_EMAIL - Customer statement generation, email notification
- EB_STMT_PUSH - Customer statement generation, push notification

For more information on notifications and notifications setup, see:

"Understanding Notification Setup" (Events and Notifications Framework)

"Setting Up the Notification Registry and Override Pages" (Events and Notifications Framework)

Setting Up Paperless Invoicing

In paperless invoicing, a physical invoice is not printed. Instead, an email notification is sent to the customer and the invoice is presented through eBill Payment.

The Invoice Media setting of an invoice determines whether an invoice is printed or transmitted using electronic data interchange (EDI), or whether an email notification is sent. In all cases, the invoice will appear in eBill Payment. The BIIVCEMAIL process will send an email for each finalized invoice with an Invoice Media setting of *Email Notification* for which an email has not been already sent.

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The Invoice Media setting is populated according to the customer contact's communication preference. When a billing contact has a communication preference setting of *Email Notification* for the document code *INVC,* then new invoices created online or through the Billing Interface will be created with an Invoice Media setting of *Email Notification.*

If an invoice contact does not have an email address or does not have access to the eBill Payment application, an error will be noted by the Finalization process and the invoice will not be generated.

Setting Up Conversations and Messages

This topic discusses setting up conversations in PeopleSoft Classic eBill Payment and the Message Center in PeopleSoft Fluid eBill Payment.

You must set up the Role, Action Code, and Action Owner to ensure the proper routing of messages based on the conversation Subject and Sub-Topic.

Go to **Set Up Financials/Supply Chain** > **Common Definitions** > **Customers** > **Customer Conversation Subjects** in the employee portal. If the Action Owner is blank, the assignment hierarchy is followed.

For information about assigning actions that originate in eBill Payment and the assignment hierarchy, see "Assigning Actions That Originate in eBill Payment" (PeopleSoft Receivables).

Related Links

Corresponding with Customers (Classic)

Using the Message Center

Configuring PeopleSoft Classic eBill Payment

Configure the look of PeopleSoft Classic eBill Payment only if you have in-depth knowledge of PeopleTools and Application Designer.

You can set up your classic portal home page by using pagelets as described in Understanding PeopleSoft eBill Payment Pagelets.

Setting Up and Configuring PeopleSoft Fluid eBill Payment

This topic discusses setting up and configuring PeopleSoft Fluid eBill Payment. See also installation documentation for more information.

Related Links

Setting Up Paperless Invoicing

Setting Up PeopleSoft eBill Payment Security

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Setting Up Payment Methods

Credit Card

Your PeopleSoft system must be set up with a credit card system using the hosted model. See the prerequisites for using the hosted model in “Using the Hosted Model for Credit Card Processing” (PeopleSoft Order to Cash Common Information).

To set up a credit card system using the hosted model, see “Setting Up Credit Card Processing for a Hosted Implementation” (Application Fundamentals).

To enable the Credit Card payment method in Fluid eBill Payment, see Setting Up Electronic and Credit Card Payment Options.

Direct Debit

To enable the Direct Debit payment method in Fluid eBill Payment, see Setting Up Electronic and Credit Card Payment Options.

See the Receivables documentation about supporting direct debits: “Prerequisites for Managing Direct Debits” (PeopleSoft Receivables).

Electronic Check

Your PeopleSoft Receivables system must be set up to support ePayments to process payments made by electronic check.

The Electronic Check payment method requires ePayment setup with a third-party payment processor. For setup information, see the documentation for the “Payment Processor Page” (Integration Interfaces).

To set up ePayment profiles, see “Setting Up ePayment Profiles” (PeopleSoft Receivables).

To enable the Electronic Check payment method in Fluid eBill Payment, see Setting Up Electronic and Credit Card Payment Options.

PayPal

The PayPal payment method option requires a PayPal merchant account and Fluid eBill Payment users must establish a PayPal customer account.

To enable the PayPal payment method in Fluid eBill Payment, see Setting Up Electronic and Credit Card Payment Options.

Delivering Customized Fluid eBill Payment

Depending on your business, you may decide to roll out only selected tiles to customers. For more information about managing tiles in PeopleSoft Fluid User Interface, see *PeopleTools: Applications User's Guide*, “Working With PeopleSoft Fluid User Interface,” Working With Fluid Home pages, Managing Tiles.

Other customizations may include hiding the PeopleTools-delivered My Preferences page available through the Actions List menu in the homepage banner. PeopleSoft Fluid eBill Payment delivers an eBill-

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specific My Preferences page available through the Actions List menu when accessed through Fluid eBill Payment pages except for the Payment Cart.

Setting Up the Message Center in Fluid eBill Payment

Billers use installation pages to set up call options displayed in the Message Center in Fluid eBill Payment. For more information about setting up call options, see Setting Up Electronic and Credit Card Payment Options.

For more information about setting up the Message Center, see Setting Up Conversations and Messages.

Setting Up the Electronic Check Payment Method

The Electronic Check payment method is available on systems that have enabled ePayments. Customers using the traditional credit card implementation (Classic eBill Payment) and customers using the hosted credit card model (Classic or Fluid eBill Payment) can support electronic check payments. To set up your PeopleSoft Receivables system for supporting ePayments through eBill Payment, see Setting Up Electronic and Credit Card Payment Options.

Note: PeopleSoft Fluid eBill Payment supports only implementations using the hosted credit card model. The setup for ePayments remains the same for both Classic and Fluid eBill Payment.

Use these high-level steps for setting up electronic checking within PeopleSoft eBill Payment:

Note: The steps may be different depending on the electronic check provider you choose for integration with PeopleSoft eBill Payment. Before you set up electronic check processing options, establish your merchant account with the third-party provider.

---

1. Establish a hosted order page (HOP) security script with the electronic check host. A HOP security script is what some third-party suppliers use to verify that transactions sent through the HOP came from your eBill Payment system.

2. Set up a payment processor URL and Payment Processor ID.

   You must set up a URL identifier on the URL Maintenance page (**PeopleTools** > **Utilities** > **Administration** > **URLs**). The Payment Processor ID should correspond to your account ID with the third-party electronic check provider.

3. Set up the payment processor in Enterprise Components.

   Use the Payment Processor page (**Enterprise Components** > **Component Configurations** > **Credit Card Interface** > **CC Interface-Payment Processor**) to define connection parameters for electronic check and credit card processing calls to a third-party provider. You enter your Payment Processor ID on this page.

   See the documentation for the Payment Processor page in “Setting Up Credit Card Interface Elements” (Integration Interfaces).

4. Enable electronic check payments in eBill Payment.

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Select the **eCheck Payments Accepted** check box and enter the electronic check payment processor on the eBill - Electronic Payments page (**Set Up Financials/Supply Chain** > **Install** > **Installation Options** > **eBill - Electronic Payments**). You must indicate whether PIN entry is required to complete electronic payment transactions.

See the documentation for the eBill - Electronic Payments page in Setting Up Electronic and Credit Card Payment Options .

5. Specify a third-party provider PIN for the self-service contact, if PIN entry is required.

   Use the Contact Information - Maintain Contacts page (**Customers** > **Contact Information** > **Maintain Contacts**) to add a personal identification number (PIN) for this contact. The PIN is mandatory or optional for electronic check payments, depending on setup on the eBill - Electronic Payments installation page. The PIN entered during the transaction must match the customer PIN on the Maintain Contacts page to successfully pay by electronic check. When the PIN is *Optional* on the setup page, but a PIN has been recorded on the Maintain Contact page, keep in mind that PIN entry will still be required to complete electronic check transactions in the Payment Cart. When the PIN is *Optional* on the setup page and no PIN value has been recorded on the Maintain Contact page, the system hides the **PIN** field in the Payment Cart, and bypasses the validation.

   See the documentation for the Contact Information - Maintain Contacts page in “Setting Up and Maintaining Contacts” (PeopleSoft Order to Cash Common Information).

6. Test the integration between the electronic check provider and your PeopleSoft eBill Payment system.

Related Links

“Setting Up Credit Card Interface Elements” (Integration Interfaces)

Setting Up Electronic and Credit Card Payment Options

This topic provides information about setting up installation-level payment options for PeopleSoft eBill Payment. Billers can configure settings available to users as well as enable available payment methods. Setup pages are available on the employee portal in the classic interface.

Related Links

“Setting Up Credit Card Options and Groups” (Application Fundamentals)

“Setting Up Credit Card Processing for a Hosted Implementation” (Application Fundamentals)

“Using the Hosted Model for Credit Card Processing” (PeopleSoft Order to Cash Common Information)

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Pages Used to Set Up Electronic and Credit Card Payment Options

Page Name	*Definition Name*	*Usage*
eBill – General Page	INSTALLATION_EB1	Configure installation-level options that apply to all Fluid eBill Payment users. The installation options here appear in the classic interface and apply to only Fluid eBill Payment.
eBill – Electronic Payments Page	INSTALLATION_EB2	Enable direct debit, credit card, electronic check, and PayPal payment methods in eBill Payment. The installation options on the eBill – Electronic Payments page appear in the classic interface and apply to both Classic and Fluid eBill Payment.

eBill – General Page

Use the eBill - General page to configure installation-level options that apply to all Fluid eBill Payment users.

The installation options here appear in the classic interface and apply to only Fluid eBill Payment.

Navigation:

Set Up Financials/Supply Chain > **Install** > **Installation Options** > **eBill – General**

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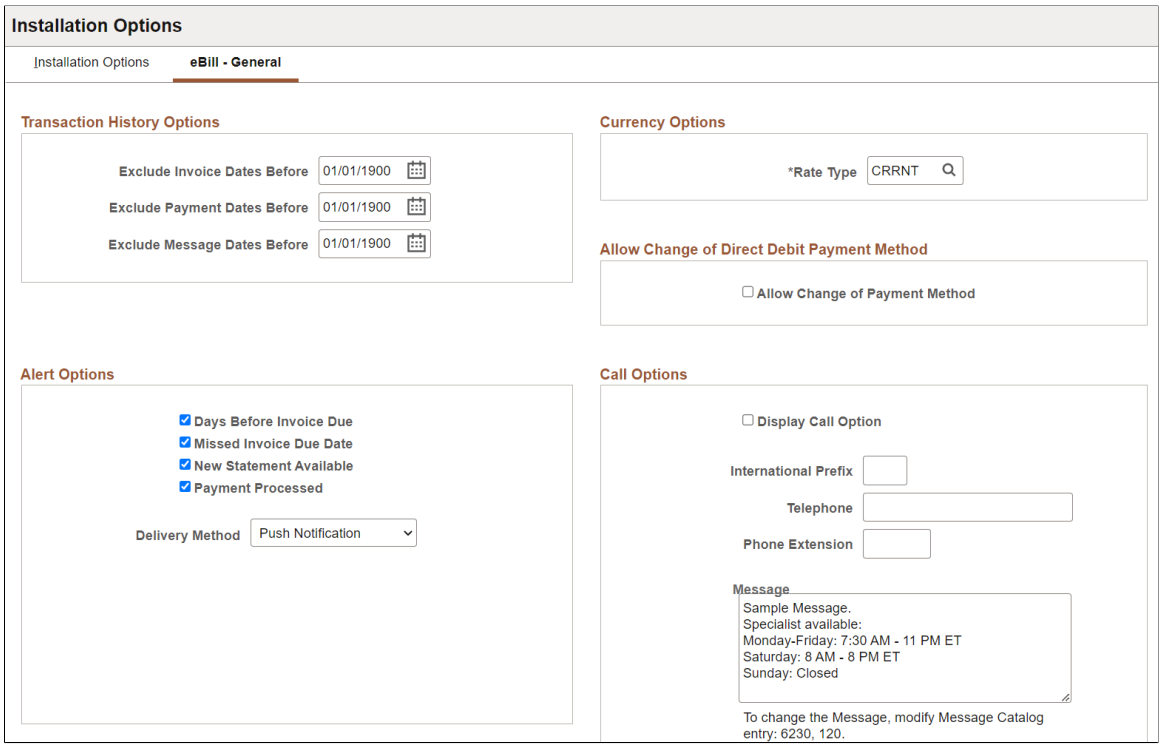
This example illustrates the fields and controls on the Installation Options, eBill – General page. You can find definitions for the fields and controls later on this page.



Transaction History Options

Use fields in the Transaction History Options region to filter the transaction dates available to users. Selections here limit transaction history to increase performance and reduce search results. Users can further filter the transactions shown using filters on specific pages, including Invoices, Payment History, and the Message Center.

Field or Control	*Description*
Exclude Invoice Dates Before	Enter a date to show Fluid eBill Payment users only invoices with an invoice date greater than or equal to the specified date. Excluded invoices are not included in customer balances.
Exclude Payment Dates Before	Enter a date to show Fluid eBill Payment users only payments with a payment date greater than or equal to the specified date.
Exclude Message Dates Before	Enter a date to show users only messages with a message date greater than or equal to the specified date.

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Alert Options

Use these options to enable different types of alerts for Fluid eBill Payment users. Users can choose from the enabled alerts on the My Preferences page. If alert options are not set up for Fluid eBill Payment users, the Alerts section will not appear on the My Preferences page.

Field or Control	*Description*
Days Before Invoice Due	Select to enable alerts that invoices are due in a specified number of days.
Missed Invoice Due Date	Select to enable alerts for late payments.
New Statement Available	Select to enable alerts that new statements are available.
Payment Processed	Select to enable alerts that payments have been successfully processed.
Default Delivery Method	Select from these options: • *Email* - Users receive one email containing an alert for each event or transaction. • *Push Notification* - This is the default setting. Users receive one alert for each event or transaction.

The alerts process must be run on a regular basis.

Currency Options

Field or Control	*Description*
Rate Type	Enter the rate type used to convert invoice balances into the customer's default currency or the user's preferred currency.

Call Options

Field or Control	*Description*
Display Call Option	Select to display the Call option on the Contact Us page. This option is deselected by default. Enter the phone number including an international prefix, phone number, and extension, if applicable.

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Field or Control	*Description*
Message	If **Display Call Option** is enabled, the eBill Payment user sees a message above the phone number on the Call page, which is accessed through the Contact Us tile. The sample message shown is delivered in the message catalog entry indicated and may be modified as desired.

eBill – Electronic Payments Page

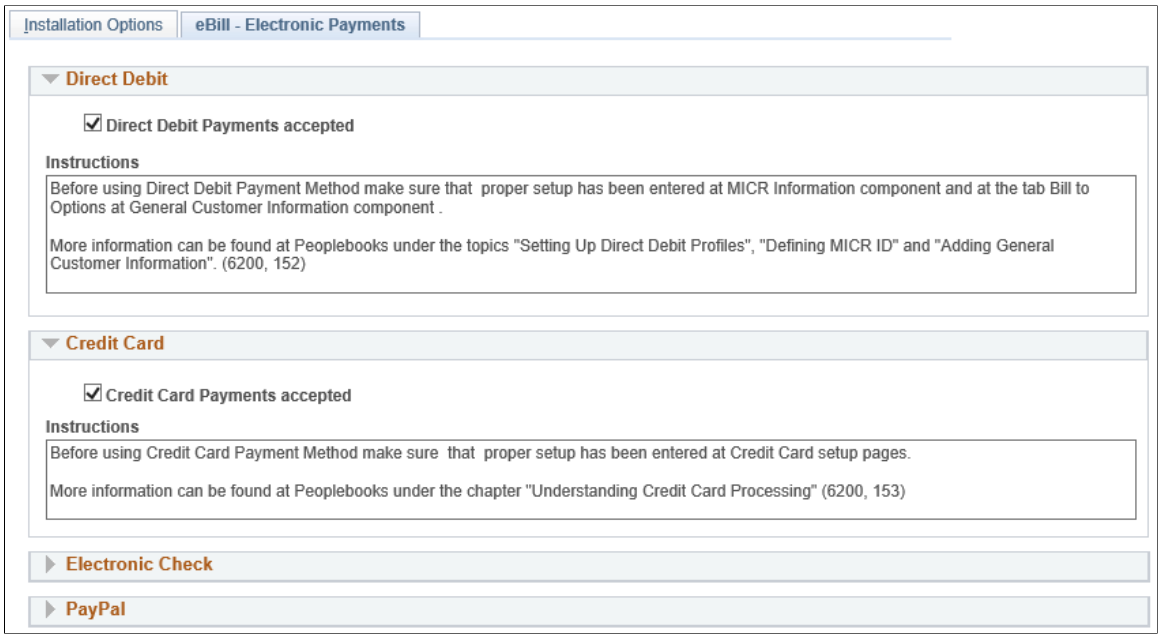
Use the eBill - Electronic Payments page to enable direct debit, credit card, electronic check, and PayPal payment methods in eBill Payment.

The installation options on the eBill – Electronic Payments page appear in the classic interface and apply to both Classic and Fluid eBill Payment.

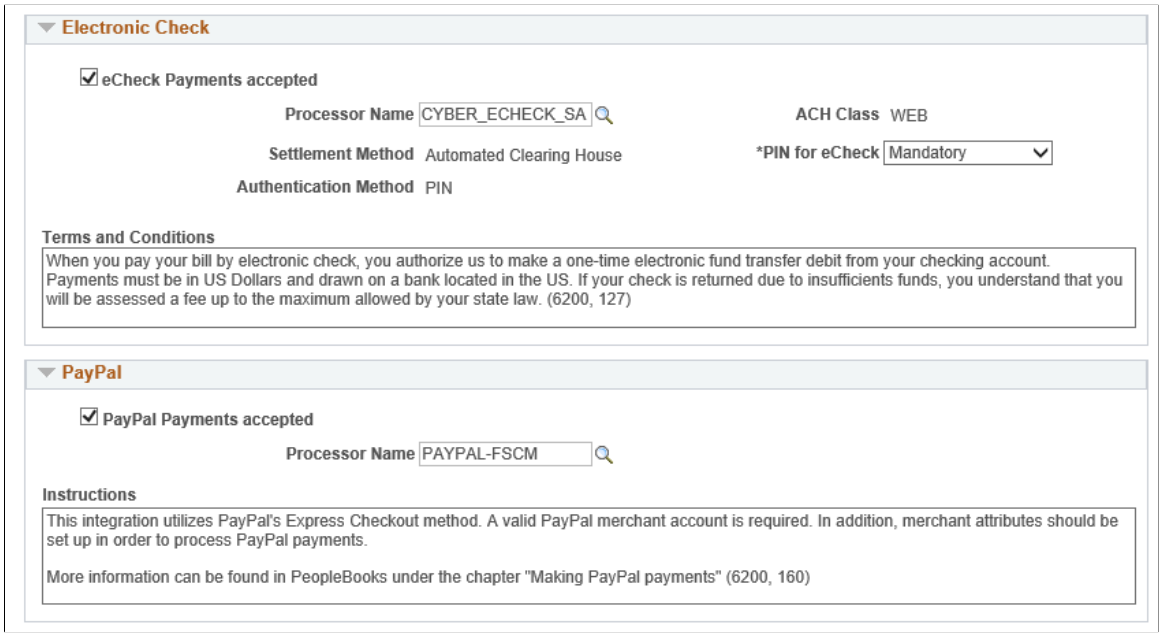
Navigation:

Set Up Financials/Supply Chain > **Install** > **Installation Options** > **eBill - Electronic Payments**

This example illustrates the fields and controls on the Installation Options, eBill - Electronic Payments page (1 of 2), where direct debit and credit card payment methods are enabled. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Installation Options, eBill - Electronic Payments page (2 of 2), where electronic check and PayPal payment methods are enabled. You can find definitions for the fields and controls later on this page.



Direct Debit

Field or Control	*Description*
Direct Debit Payments accepted	Select this check box to enable direct debits as a payment method in the Payment Cart in eBill Payment.
Instructions	Displays the setup instructions for the direct debit payment method, subsequent to enabling it as a self-service payment option. You can modify the message catalog entry (6200, 152) to customize the direct debit setup instructions.

Credit Card

Field or Control	*Description*
Credit Card Payments accepted	Select this check box to enable credit cards as a payment method in the Payment Cart in eBill Payment.
Instructions	Displays the setup instructions for the credit card payment method, subsequent to enabling it as a self-service payment option. You can modify the message catalog entry (6200, 153) to customize the credit card setup instructions.

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Electronic Check

Field or Control	*Description*
eCheck Payments accepted	Select this check box to enable electronic check as a payment method in the Payment Cart in eBill Payment.
Processor Name	Specify the defined name of the electronic check processor. This field is required when you select the electronic check payment method.
Settlement Method	Displays Automated Clearing House to indicate that U.S. transactions are deposited using the Automated Clearing House (ACH) Network.
Authentication Method	Displays PIN (personal identification number). Processing for electronic checks may require a 6-digit value if enabled in the contact profile, to identify the user who initiates an electronic check transaction. See the fields and control definitions on the “Contact Information - Maintain Contacts Page” (PeopleSoft Order to Cash Common Information).
ACH Class	Displays WEB (web-initiated entry) to indicate that electronic authorization occurs through National ACH. See http://www.nationalach.com.
PIN for eCheck	Select *Mandatory* or *Optional*. The system determines PIN requirements for payments by electronic check using this field and the PIN entered on the Maintain Contacts page as follows: • *Mandatory* - A PIN must be designated on the Maintain Contacts page. Self-service users must enter the matching PIN correctly in the Payment Cart to proceed with the electronic check payment. • *Optional* - When a PIN exists on the Maintain Contacts page, the user must enter this PIN in the Payment Cart to proceed with the electronic check payment. When no PIN value exists on the Maintain Contact page, the system hides the **PIN** field in the Payment Cart and bypasses the validation.

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Field or Control	*Description*
Terms and Conditions	Enter the payment terms and conditions for electronic check payments. Modify the message catalog entry (6200, 127) to display custom terms and conditions for payments by electronic check on the self-service Make Payment page in eBill Payment.

PayPal

Field or Control	*Description*
PayPal Payments accepted	Select this check box to enable PayPal as a payment method in the Payment Cart in eBill Payment.
Processor Name	Specify the defined name of the PayPal processor. This field is required when the PayPal payment method is selected.
Instructions	Displays the setup instructions for the PayPal payment method, subsequent to enabling it as a self-service payment option. Modify the message catalog entry (6200, 160) to customize the PayPal setup instructions.

Setting Up the Financials Audit Framework for PeopleSoft eBill Payment

This topic presents an overview of Financials Audit Framework (audit logging) for PeopleSoft eBill Payment.

Related Links

“Setting Up Financials Audit Framework (Audit Logging)” (Application Fundamentals)

Understanding the Financials Audit Framework for PeopleSoft eBill Payment

The Financials Audit Framework (audit logging) provides efficient tracking of transaction processing that results in enhanced visibility and detailed audit trails. The framework is a centralized structure that allows you to identify the statuses of transactions to be tracked, including online views to search the audit log results by source, transaction and user. You can also archive and purge the audit logs.

You must enable the document events based on the document name in PeopleSoft eBill Payment for which you want audit logging performed. You can also select the Include Archive check box for each document name to include data archived by the PeopleSoft Data Archive Manager.

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See the product documentation for *PeopleTools: Data Management*.

- Enable Audit Logging
- Search Audit Logs
- Purge Audit Logs

Use the Enable Audit Logging page (FS_AUDITLOG_ENABLE) to enable PeopleSoft eBill document events for audit logging.

Navigation:

Set Up Financials/Supply Chain > **Common Definitions** > **Audit Logging** > **Enable Audit Logging** > **Enable Audit Logging**

Document Name	***Event Name***
Billing Address	Add Billing Address
	Delete Billing Address
	Edit Billing Address
Contact Information	Add Contact Information
	Delete Contact Information
	Edit Contact Information
Credit Cards	Add Credit Cards
	Delete Credit Cards
	Edit Credit Cards

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Chapter 3

PeopleSoft Classic eBill Payment Self-Service Transactions

Understanding PeopleSoft Classic eBill Payment Self-Service Transactions

PeopleSoft eBill Payment consists of several self-service transactions that are designed for the casual, untrained user. These self-service transactions enable customers to view account information and pay invoices online, even if they have very little internet or PeopleSoft application experience. Customers sign in to the PeopleSoft application with a user name that is linked to a contact ID, which in turn links to their customer identification so that only information that is relevant to the contact customer ID is accessible.

Because every organization has its own business needs, these self-service transactions should be considered starter kits that you can configure to meet the organization's specific business requirements. For example, on the Invoices page, an organization may prefer to display the line identifier rather than the line description when displaying invoice line details. Also, depending on the tax solution that the organization implements, you may prefer to display tax code rather than tax authority when displaying line tax details.

The common elements used in the PeopleSoft Classic eBill Payment topics are the following:

Term	*Definition*
As of Date	The last date for which a report or process includes data.
Add to Payment Cart	If the invoice is eligible for payment, a button or link appears to enable customers to add the corresponding invoice to the Payment Cart and to navigate to the Payment Cart page, where they can view the content and update the invoices in the Payment Cart. When a customer adds a consolidated invoice to the Payment Cart, the system displays each of the attached invoices separately on the Payment Cart page. The contents of the Payment Cart will be saved when the user clicks the **Add to Payment Cart** button. Hence, the user can log out and log in again later to continue working with the Payment Cart.
Invoice Search	A customer can click to access the Invoice Search page, where they can enter search criteria to display a specific invoice.

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Term	*Definition*
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Current Balance	The total amount of the invoice reduced by any payments paid toward the invoice. The system calculates the balance by summing the BAL_AMT values in the PS_ITEM table, reduced by any credit card payments that are in process. If the item has not yet been created in PeopleSoft Receivables, the system retrieves the balance from the BI_HDR **Invoice Amount** field.
Description	Descriptive text up to 30 characters.
Due Date	The date on which payment is due. The system calculates due date by taking the minimum due date of all open items from the PS_ITEM table. If the invoice has not yet been created in PeopleSoft Receivables, the system retrieves the date from the BI_HDR due date.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
EmplID (employee ID)	Unique identification code for an individual associated with an organization.
Subtotal	Total line amount before discounts and surcharges.
Invoice Amount	Total amount owed for the invoice.
Invoice Date	Date on which the invoice was invoiced.
Invoice ID	When searching for a specific Invoice ID, customers can search for a specific invoice ID or enter a partial invoice ID to display a list of all possible values.
Invoice Status	If the invoice has a balance of zero, the status is *Closed.* Otherwise, the status is *Open.*

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Term	*Definition*
Language and **Language Code**	The language in which you want the field labels and report headings of reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Net Extended Amt (net extended amount)	The total gross amount, plus all surcharges, reduced by all applicable reductions for the invoice.
Return to Invoice List	From the Invoice Summary page, a customer can click to return to the Invoice List page.
User ID	The system identifier for the individual who generates a transaction.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define an organization's structure and processing options.
Total Discounts	The total discounts associated with the invoice.
Total Surcharges	The total surcharges associated with the invoice.
Type	The invoice type—for example, debit memo, or credit memo.
UOM (unit of measure)	The unit of measure code that represents the unit used to quantify the invoice in the corresponding invoice line.
Unit Price	The price billed for each invoice in the corresponding invoice line.

Accessing PeopleSoft Classic eBill Payment Transactions

When your customers access the PeopleSoft CUSTOMER registry, the system displays a link to the eBill Payment functional area navigation page, also known as the home page. From the home page, your customers can access all PeopleSoft Classic eBill Payment transactions.

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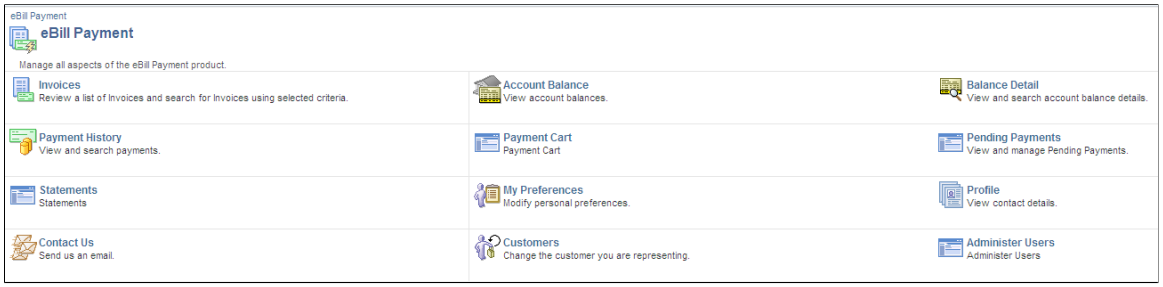
This example illustrates the fields and controls on the PeopleSoft Classic eBill Payment Home page.



Using the PeopleSoft Classic eBill Payment Home Page

Customers can click these links on the PeopleSoft Classic eBill Payment Home page:

Links	*Usage*
Invoices	Access the Invoices - Invoices List page. After selecting an invoice, customers can view summary information pertaining to the invoice and add this invoice to the payment cart. This link appears only if PeopleSoft Billing is installed.
Account Balance	Access the Account Balance page. Customers can view account balance information.
Balance Detail	Access the Balance Detail page. Customers can search and view any invoice in Accounts Receivable.
Payment History	Access the Payment History page. Customers can view this payment information once Receivables Update has processed the worksheet created by credit card or direct debit processing.
Payment Cart	Access the Payment Cart page. Customers can view the invoices that were added to the Payment Cart for payment. Also, customers can initiate the Make Payment process from here.
Pending Payments	Access the Pending Payments page. Customers can search for and view invoices that have been sent for payment by eBill Payment. The system removes the payment from the Pending Payments page upon processing in Receivables.

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Links	*Usage*
Statements	Access the Statements page. This page displays a printable image of the most recent statements. This allows the user to print the statement from the browser. The statements will be displayed only for Customer defined with the Invoice To option and View Statement selected on the Self Service Security tab. Open Balance Statements and Balance Forward Statements will be displayed as a printable image. The Statement page displays the Statement ID, Statement date and an icon to display the Statement rendered image. The user is allowed to select a statement from the Statement page and add all the invoices listed in this statement to the Payment Cart. If the invoice is already in the payment cart, it will not be added again. If the invoice belongs to multiple statements that have been selected to be added, there will be only one line for this invoice in the Payment Cart. If the user wants to have only invoices from that specific statement in the Cart, the user should go the Cart and press Empty button first, and then go the Statement page to add the desired statement. Only the invoices of the customer logged will be listed in the Statement image. The invoices of customers that have the logged customer as their Correspondence Customer will not be displayed.
My Preferences	Access the Preferences page. Customers can modify their preferences to personalize their user experiences with the PeopleSoft eBill Payment transactions.
Profile	Access the Profile - Contact Information page. Customers can review or update information about themselves, update Billing address information, and modify their credit card profiles.
Contact Us	Access the Send us an Email page. Customers can initiate two-way conversations with customer service representatives. If prior conversations were initiated through the Contact Us page, then a **Review Messages** link appears.
Customers	Access the Customers page. Users who represent more than one customer can conduct business on behalf of only one customer at a time in eBill Payment. Representatives can select the active customer on the Customers page.
Administer Users	Access the Administer Users page. External administrator can add or modify/update user profiles.

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Establishing PeopleSoft Classic eBill Payment User Experience

When customers log in to Classic eBill Payment, they can determine how they will interact with the site and which customer transactions to work with while viewing account information. Users can also update information about themselves, such as name, phone number, billing address, and credit card information.

Pages Used to Establish PeopleSoft Classic eBill Payment Preferences

Page Name	*Definition Name*	*Usage*
My Preferences for eBill Payment Page	EB_USER_PREF_SS	Modify default preferences for PeopleSoft Classic eBill Payment. See Selecting Customers.
Profile - Contact Information Page	BI_CONTACT_SS_PHN	Update current effective-dated billing contact information, such as name, email address, phone number, and invoice delivery options.
Profile - Billing Address Page	BI_CUST_ADDRESS_SS	Review all current billing address information that is on file by clicking the **Billing Address** link on the Profile - Contact Information page.
Profile - Edit Address Page	BI_CUST_ADDRCHG_SS	Edit customer billing address information by clicking the **Edit Address** button on the Profile - Billing Address page.
Profile - Add a Billing Address Page	BI_CUST_ADDRCHG_SS	Add a billing address by clicking the **Add a Billing Address** button on the Profile - Billing Address page.
Profile - Credit Card Data Page	BI_CR_CARD_LIST_SS	View all the credit cards on file by clicking the **Credit Card Data** link on the Profile - Contact Information page. Click the **Edit** or **Remove** button to update the credit card information. If your business is using the hosted credit card model, clicking the **Edit** button transfers you to the third-party site.

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Page Name	*Definition Name*	*Usage*
Profile - Add a Credit Card Page	BI_CR_CARD_CHG_SS	Add new credit card information by clicking the **Add a Credit Card** button on the Profile - Credit Card Data page. If your business is using the hosted credit card model, clicking this button transfers you to the third-party site, where you can enter new credit card information.

Note: Depending on whether the system is set up for hosted or non-hosted solutions, the appearance of this page may vary. For more information, see “Understanding Credit Card Processing” (PeopleSoft Order to Cash Common Information).

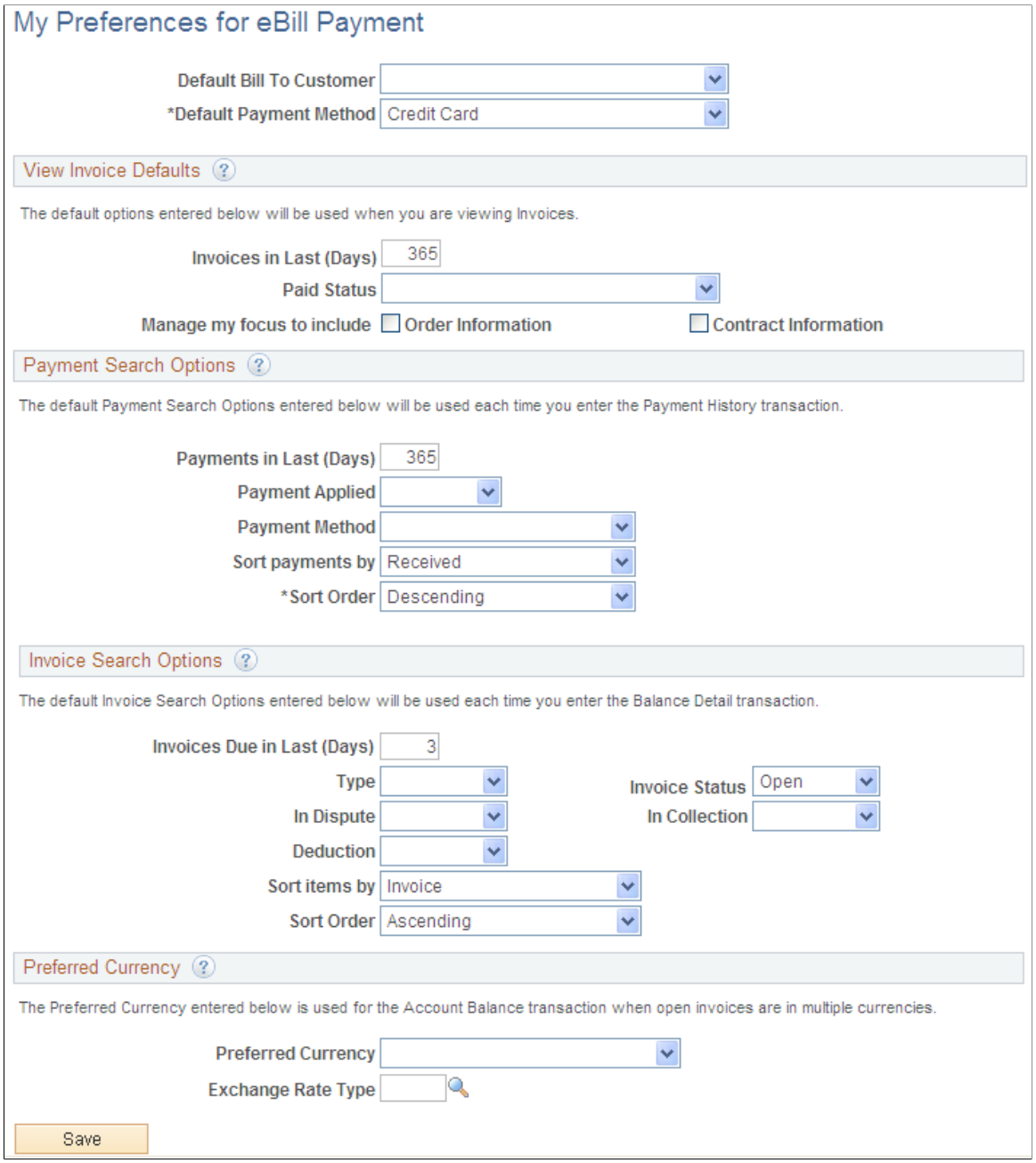
My Preferences for eBill Payment Page

Use the My Preferences for eBill Payment page (EB_USER_PREF_SS) to modify default preferences for PeopleSoft Classic eBill Payment.

Navigation:

Click the **My Preferences** link from the home page or the navigation menu.

This example illustrates the fields and controls on the My Preferences for eBill Payment page (Classic). You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Default Bill To Customer	Appears only for users who represent multiple invoice-to customers. These users can select the default invoice-to customer that they want to represent when they first sign in.

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Field or Control	*Description*
Default Payment Method	Change the default payment method. The available payment methods depend on system setup. The method that the customer selects appears by default on the Payment Cart page. **Note:** If you select *Direct Debit* as the Default Payment Method and the status of the prenote on the Invoice To Options page (**Customers** > **Customer Information** > **Create Customer Information**) is *New, Pending,* or *Rejected,* a warning appears informing the user that direct debit transactions will not be processed until the prenote is confirmed.

View Invoice Defaults

Field or Control	*Description*
Invoices in Last (Days)	View invoices that are generated in a specified time period, such as the last 30 or 60 days on the Invoices - Invoice List page.
Paid Status	Select the default paid status to be used when viewing an invoice. The available options are *Not Yet Paid/Applied* and *Paid/Applied*.
Manage my focus to include	Select the **Order Information** check box to view and search for invoices by order number, contract number, and purchase order number. Customers select the **Contract Information** check box to view and search for invoices by contract number, purchase order number, and project ID. Selecting these options enables customers to view corresponding source-data details at the invoice line level on the Invoices - Invoice Line Details page.

Payment Search Options

Field or Control	*Description*
Payments in Last (Days)	Elect to view payments made in a specified time period, such as the last 30 or 60 days. The default is 365 days.
Payment Applied	Elect to view payments that have been applied on the Account Balance and Payment History page. They can select *Yes* to search only payments that have been applied or leave this field blank to search both.

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Field or Control	*Description*
Sort payments by	Specify a default payment sorting order of *Ascending* or *Descending*.

Invoice Search Options

Customers can specify the default search criteria for the Balance Detail transaction using these fields:

Field or Control	*Description*
Invoices Due in Last (Days)	Enter the number of days that invoices due should be displayed on the Balance Detail page.
Type	Select *Credit Memo, Debit Memo,* or *Invoice.*
Invoice Status	Select *Open* or *Closed.*
In Dispute	Displays invoices that are in dispute only if *Yes* is selected.
In Collection	Displays invoices that are in collection only if *Yes* is selected.
Deduction	Select *Yes* or *No.*
Sort items by	Customer can specify default invoice sorting order as *Ascending* or *Descending.*

Preferred Currency Options

When you enter an invoice into accounts receivable, an entry currency is associated with the amount. By default, the system uses this currency to display the amounts in the Amount Balance transaction. The Account Balance transaction displays total amounts; if the total amount includes invoices with different entry currencies, then the total is meaningless. The Account Balance page displays ****Multiple Currencies**** in the amount and total fields if multiple currencies are used.

Field or Control	*Description*
Preferred Currency	Select preferred currencies into which the system converts all amounts that is displays. The currency selected here is used to display Account Balance transactions only. They must select a corresponding rate type.

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Selecting Customers

Navigation:

Click the **Customers** link from the eBill Payment Home page or the navigation menu.

When a user first accesses the PeopleSoft eBill Payment application, a global customer variable is established that stores the customer ID for the user who is signed in. This global variable is used throughout PeopleSoft eBill Payment transactions to track the customer with whom the user is currently working.

Your customers can use the **Customer** link to change the customer that is currently represented. Users who represent multiple bill-to customers can select only one customer at a time while working with PeopleSoft eBill Payment transactions. When the user first signs in, the initial customer that is represented is the customer that is defined as the default customer on the My Preferences page. Selecting a different customer from the Customer Selection page updates the global variable to the new customer.

If you have not previously set up row-level security for the user ID that the customer specifies when signing in, the system displays a page stating that the customer sign-in is not set up to access the requested transaction. You can modify this message to suit the business procedures that you would like customers to follow in this situation in the Message Catalog Text that is associated with this message.

Profile - Contact Information Page

Your customers can use PeopleSoft eBill Payment Profile pages to update address information; update billing contact information, such as name and email; choose invoice delivery options; and update credit card information. The user has the option to add, edit, or remove a billing address. The user is not allowed to remove an address if only one active billing address is on file. Similarly, the user can add, edit, or remove credit card data. A check box available in the Credit Card Data page allows users to save a new credit card as their primary card.

Navigation:

eBill Payment > **Profile**

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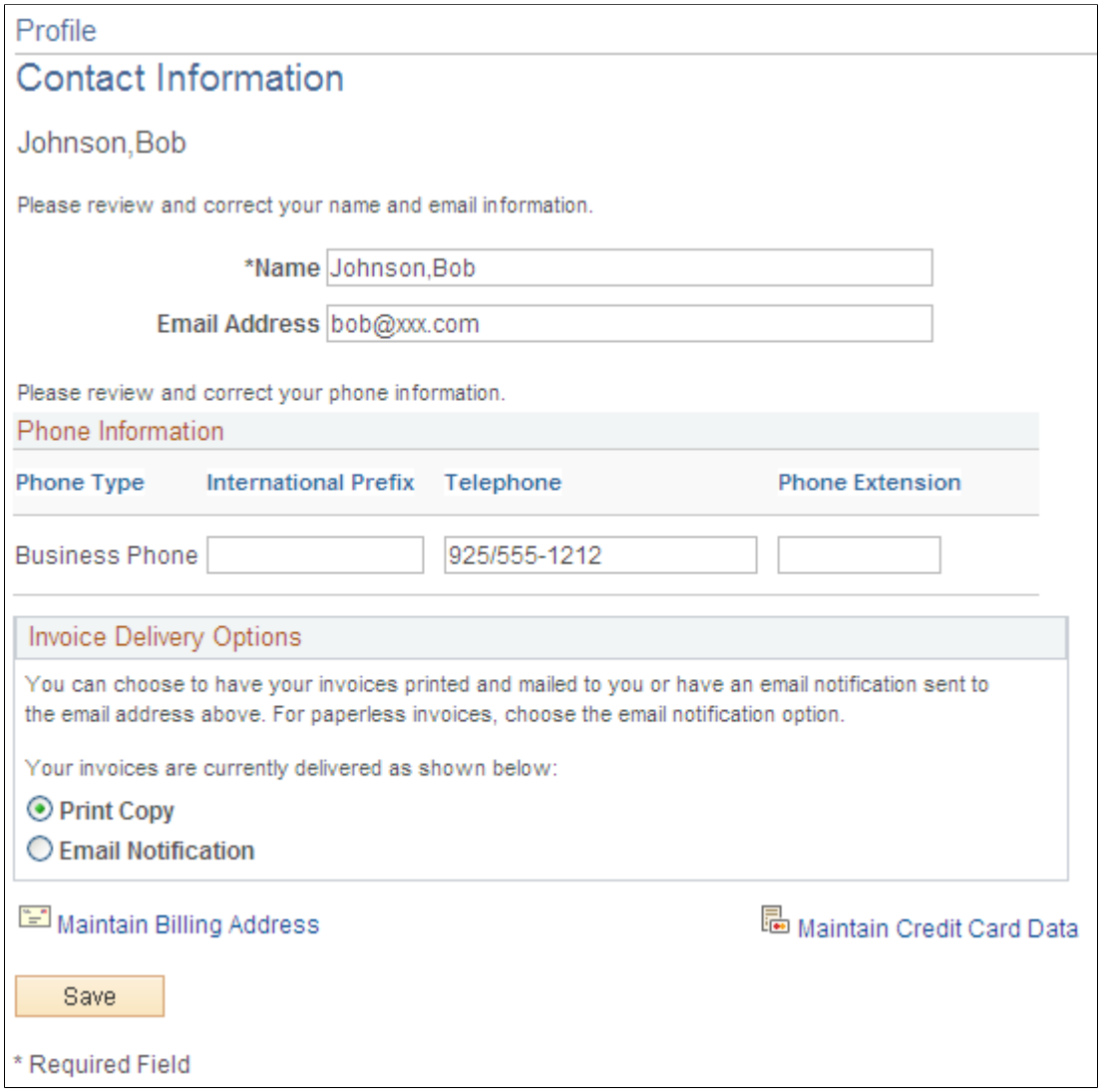
This example illustrates the fields and controls on the Profile page.



Note: If a customer's primary contact address differs from the primary invoice-to address, the system uses the primary contact address as the primary invoice to address when new invoices are created.

Whenever a change is made to the profile of a contact from an eBill Payment page and saved, an email is sent to the contact for security purposes. The following changes will trigger an email notification:

- Update to billing address.
- Update to credit card data.
- Change in contact name.
- Change in contact email address.
- Change in contact telephone number.
- Change in invoice delivery option.

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The text in the email notification (for example, Company information) can be customized by changing the message catalog entry.

The message catalogs entries that needs to be edited for any customization in the email are the following:

- 12505,140 - Change in Customer Profile.
- 12505,141 - Changes required in contact name, contact email address, contact telephone number or invoice delivery option.
- 12505,142 - Changes to the billing address.
- 12505,143 - Change in company name.
- 12505,144 - Change in company phone number.
- 12505,145 - Change in company email address for correspondence.
- 12505,163 - Changes to credit card data.

Invoice Delivery Options

Customer contacts can choose either *Print Copy* or *Email Notification* as their invoice delivery method. When a customer chooses *Print Copy,* the Billing invoice processes generate an invoice for printing. When a customer chooses *Email Notification,* the Billing invoice processes do not print an invoice but instead send an email notification. In both cases, the invoice and supporting information can be viewed in the eBill Payment application. EDI (Electronic Data Interchange) customers cannot change to an alternate invoice delivery method, nor can non-EDI customers choose EDI as the delivery method. Similarly for the Email Invoice as Attachment delivery method, customers cannot choose *Email Invoice as Attachment* from within eBill Payment. They have to choose the *Email Notification* option.

Viewing Invoices (Classic)

This section discusses how to:

- Review invoices.
- Search for invoices.
- Review invoice details.
- View invoice activity and credit card payments in progress.
- Review invoice line details.
- Review discounts and surcharges.
- Review tax details.
- Email an invoice copy.

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Pages Used to View Invoices

Page Name	*Definition Name*	*Usage*
Invoices - Invoice List Page	BI_BILL_LIST_SS	Review the most recent invoices.
Invoice Search Page	BI_SRCH_SS	Display a list of all possible invoices that meet specified search criteria. Leave search criteria fields blank to display all possible values for these fields.
Invoices - Invoice Summary Page	BI_SUMMARY_SS	Review invoice details and add eligible invoices to the payment cart.
Invoices - Invoice Activity Page	AR_EBP_ACT_SEC	Review invoice activity and credit card payments that are in progress.
Invoices - Invoice Line Details Page	BI_LINE_SS	Review details for the corresponding invoice line. The fields that appear on this page are determined by the options that a customer selected on the My Preferences page.
Invoices - Shipping Address	BI_ADDRESS_SS	Review the shipping address.
Invoice Line Discount and Surcharge Details Page	BI_LINE_DS_SS	Review all discounts and surcharges that are associated with a specified invoice line.
Invoice Line Tax Details Page	BI_LINE_TAX_SS	Review all value-added tax and sales or use tax that is associated with a specified invoice line.
Email Invoice Copy Page	BI_EMAIL_DOCS_SS	Email a copy of the invoice in PDF format to the Email address entered.

Invoices - Invoice List Page

Use the Invoices - Invoice List page (BI_BILL_LIST_SS) to review the most recent invoices.

Navigation:

Click the **Invoices** link from the eBill Payment Home page or from the left navigation menu.

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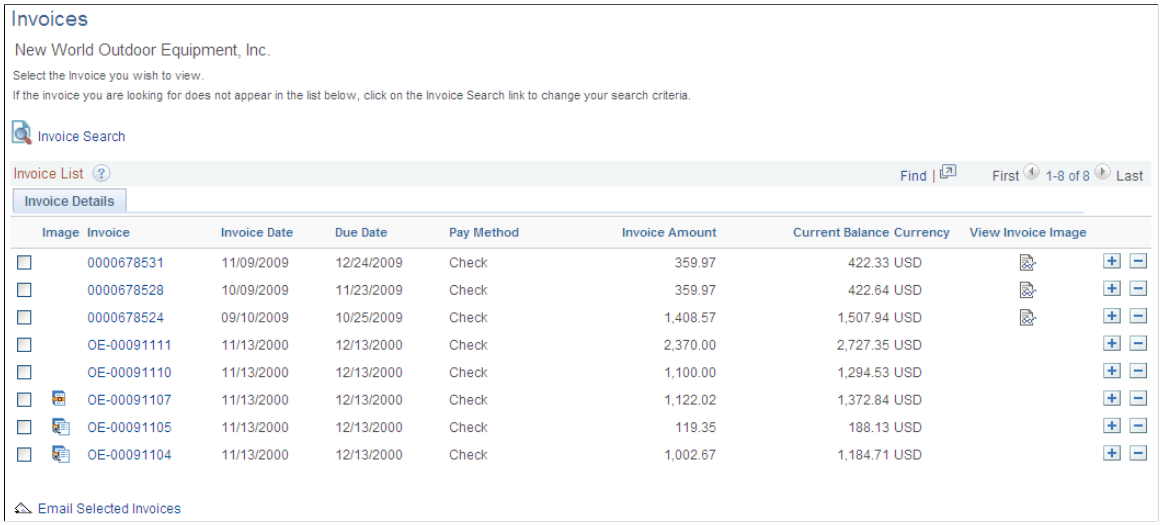
This example illustrates the fields and controls on the Invoices - Invoice List page.



Field or Control	*Description*
Invoice	Displays all invoices for this customer. The system displays invoices by order of invoice date, from the most recent to the oldest. Customers can click an invoice number to access the Invoices - Invoice Summary page, where they can view invoice details and pay invoices.
Invoice Date	Date on which the bill was invoiced.
Due Date	The invoice due date.
Pay Method	Displays the scheduled payment method for the invoice.
View Invoice Image	Click this link to view an image of the invoice. The link will open the invoice image in a separate window. Link is visible only when invoice image is available.
Order Number, Contract Number, and Purchase Order	If the customer selected the **Order Information** check box on the My Preferences page, these fields appear here.
Email Selected Invoices	Click this link to send email for multiple invoices. When the user selects the *Email Selected Invoices* link, they are presented with a page that prompts for the email address to be used. You can send one invoice and its supporting documents (attachments) as one transaction (invoice) at a time.

Invoice Search Page

Use the Invoice Search page (BI_SRCH_SS) to display a list of all possible invoices that meet specified search criteria.

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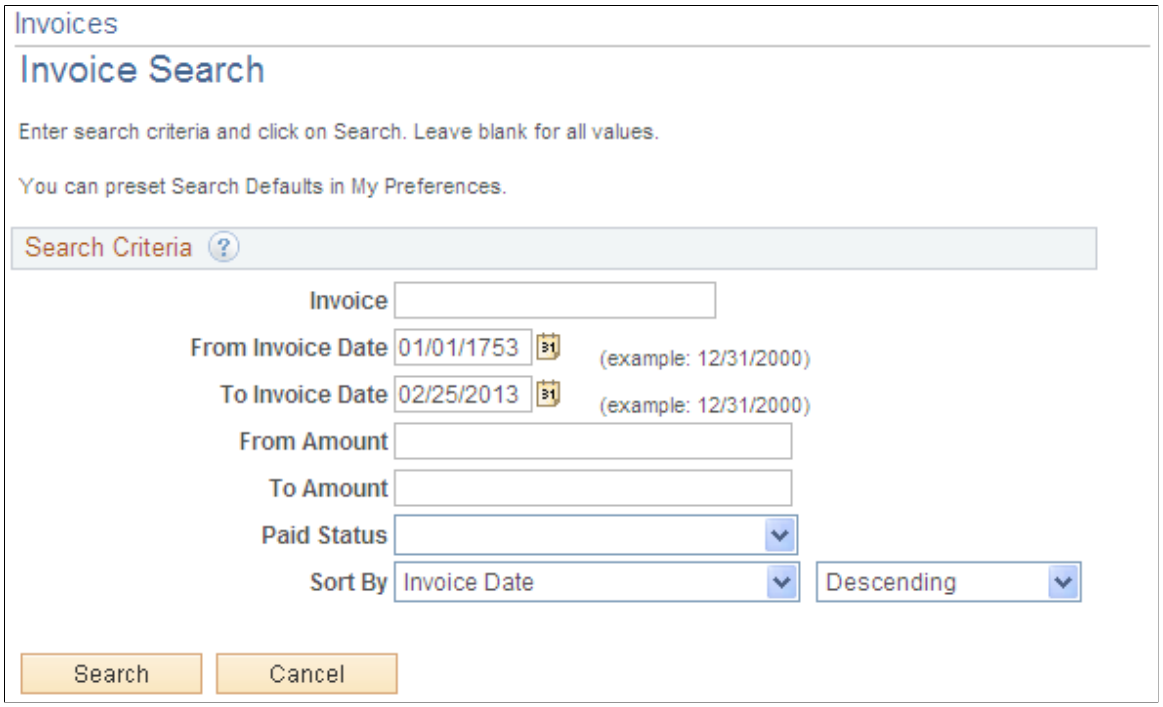
Leave search criteria fields blank to display all possible values for these fields. Customers can search for specific invoices or enter a partial invoice number to display a list of all possible values.

Navigation:

Click the **Invoice Search** link on the Invoices - Invoice List page.

This example illustrates the fields and controls on the Invoice Search page.



Field or Control	*Description*
Invoice	Search for specific invoices or enter a partial invoice number to display a list of all possible values.
From Invoice Date	Enter a date or select a date from the available options to display all invoices that are generated on or after the specified date.
To Invoice Date	Enter a date or select a date from the available options to display all invoices that were generated on or before the date specified.
Calendar	Click the calendar icon to select the month, day, and year parameters by which to filter the **From Invoice Date** or **To Invoice Date** search.
From Amount	Enter search parameters for minimum invoice amounts. The system displays all invoices with total amounts that are greater than or equal to the amount that the customer specifies.

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Field or Control	*Description*
To Amount	Enter search parameters for maximum invoice amounts. The system displays all invoices with total amounts that are less than or equal to the amount that a customer specifies.
Order Number, Contract Number, and Purchase Order	If customers select the **Order Information** check box on the My Preferences page, they can view and search for invoices at the header and line level by order number, contract number, and purchase order number. If customers select the **Contract Information** check box on the My Preferences page, they can view and search for invoices at the header and line level by contract number, purchase order number, and project ID.
Paid Status	Select the paid status for the invoice. The available options are *Not Yet Paid/Applied* and *Paid/Applied*.
Sort By	Select the criteria by which you want to sort the results of your search. Customers can sort results in *Ascending* or *Descending* order. For example, a customer wants to search for all invoices that were generated since December 31, 2000, and view the results with most recent invoices displayed first. The customer enters *12/31/2000* in the **From Invoice Date** field, selects *Invoice Date* as the sort by criteria, and sorts the results in descending order.
Search	Click this button after defining filters to access the Invoices page, where you can view the results of search queries that are sorted in the order specified.
Cancel	Click this button to cancel the search and return to the Invoices - Invoice List page.

Invoices - Invoice Summary Page

Use the Invoices - Invoice Summary page (BI_SUMMARY_SS) to review invoice details and add eligible invoices to the payment cart.

Navigation:

Click an Invoice number value on the Invoices - Invoice List page.

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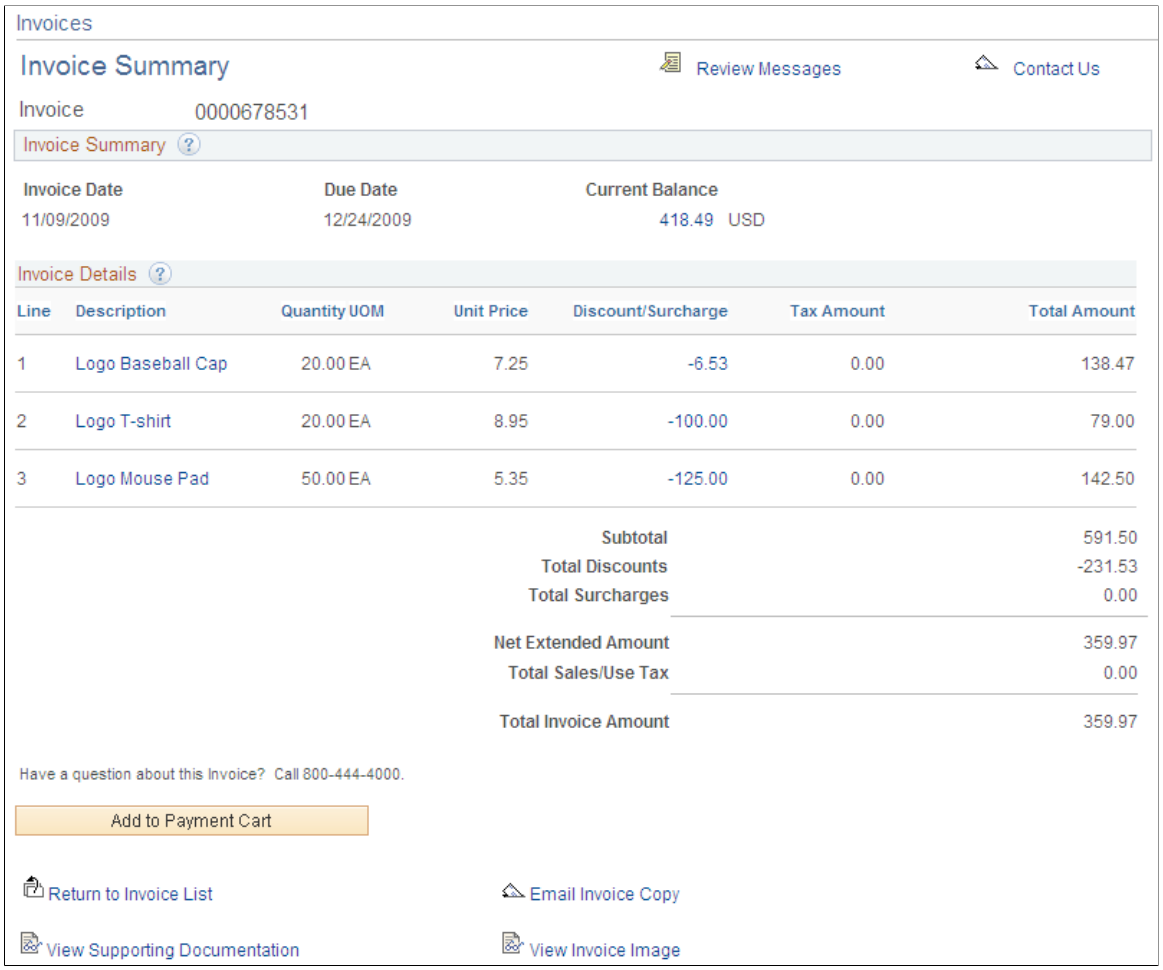
This example illustrates the fields and controls on the Invoices - Invoice Summary page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Review Messages	Click this link to review the existing conversations on the Review Messages page.
Contact Us	Click this link to open the Contact Us page. The invoice field will be prepopulated only if the link is clicked from the Invoice Summary page or the Account Balance – Invoice Detail page.
View Supporting Documentation	Click this link to view a list of supporting documents that are attached to an invoice.
View Invoice Image	Click this link to view an image of the invoice. The link will open the invoice image in a separate window. This link is visible only when invoice image is available.

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Invoice Summary

Field or Control	*Description*
Current Balance	Displays the total amount of the invoice, reduced by any payments that are paid toward the invoice. The system calculates the balance by summing the BAL_AMT value of all invoices for the invoice in the PS_ITEM table, reduced by any credit card payments in process. If the invoice is not created in PeopleSoft Receivables, the balance appears by default from the BI_HDR **Invoice Amount** field. Customers can click any link in this column to access the Invoices - Invoice Activity page, where they can view PeopleSoft Receivables details for the invoice, such as the invoice status, balance, and activity for the specified invoice. If the invoice has not been created in PeopleSoft Receivables, this link is disabled.

Note: If in your business practices you associate prepayments with invoices in PeopleSoft Billing, you should run PeopleSoft Billing and Receivables batch processes in a timely manner to enable the system to calculate the current balance with up-to-date information. If the current balance amount does not reflect a prepayment towards an invoice, you may need to run the Load AR process (BILDAR01), the Receivable Update process (AR_UPDATE), the Payment Predictor process (AR_PREDICT), and the Receivables Update process again to apply the prepayment to the invoice. If you choose to manually apply payments, you need to balance the payment worksheet rather than run the Payment Predictor process.

Field or Control	*Description*
Total Invoice Amount	Displays the total amount of the invoice, equal to the sum of the net extended amount, the total value added tax amount, and the total sales and use tax of the invoice.

Invoice Details

Field or Control	*Description*
Line	Displays an invoice line number that you use to reference specific information that is contained on the corresponding invoice line.
Description	Displays a short description of the invoice that is billed on the corresponding invoice line. Customers can click any link in this column to access the Invoices - Invoice Line Details page, where they can review the source-level details for the corresponding invoice line.

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Field or Control	*Description*
Discount/Surcharge	Displays the combined amount of discounts and surcharges that are applied to the corresponding invoice line. Customers can click any link in this column to access the Invoice Line Discount and Surcharge Details page, where they can view detailed information about the discounts and surcharges that are applied to the specified invoice line.
Tax Amount	Displays the total amount of sales and use tax and value-added tax that is applied to the corresponding invoice line. Customers can click any link in this column to access the Invoice Line Tax Details page, where they can view detailed information about the taxes that are applied to the corresponding invoice line.
Total Amount	Displays the product quantity and unit price minus total discounts and plus surcharges and taxes for the corresponding invoice line.

Invoices - Invoice Activity Page

Use the Invoices - Invoice Activity page (AR_EBP_ACT_SEC) to review invoice activity and credit card payments that are in progress.

Navigation:

Click the **Show Details** link in the Current Balance column on the Invoices - Invoice Summary page or click the **Activities** link from the Balance Detail - Invoice Detail or Payment History - Invoice Detail pages.

Field or Control	*Description*
Customer Balance	Displays the invoice balance.

Invoice Activity

Field or Control	*Description*
Accounting Date	The date of the invoice or payment transaction against the invoice.

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Credit Card Payments In Progress

Field or Control	*Description*
Authorization Date	Displays the date that the credit card payment was authorized.
Authorization Code	Displays the authorization code that the bank assigns to authorize the credit card transaction.
Amount	Displays the authorized transaction amount.

Invoices - Invoice Line Details Page

Use the Invoices - Invoice Line Details page (BI_LINE_SS) to review details for the corresponding invoice line.

The fields that appear on this page are determined by the options that a customer selected on the My Preferences page.

Navigation:

Click the link in the Line Description column on the Invoices - Invoice Summary page.

Field or Control	*Description*
Invoice Number	Displays the identifier for the invoice on which the corresponding line is billed.
Invoice Line	Displays the number of the corresponding invoice line.
Description	Includes a description of the invoice that is billed on the corresponding line.
Order Number	Displays the identifier that is assigned to the order.
Order Date	Displays the date that the sales order is created.
Shipping ID	Displays shipment's unique identification.
RMA Number (return material authorization number)	Displays the order number of the returned material authorization.
Sold To Customer	Displays the name of the customer that ordered the product.
Order Line	Displays the order line number.

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Field or Control	*Description*
Ship Date	Displays the date that the order is shipped.
View Shipping Address	Click this link to navigate to the Invoices - Shipping Address page (BI_ADDRESS_SS), where you can review the ship-to address. This link appears only if the customer has chosen to view order information on the My Preferences page.
RMA Line Number	Displays the line number of the returned material authorization.
Contract Number	Displays the contract number that is associated with the corresponding invoice line.
Purchase Order	Displays the purchase order number that is associated with the corresponding invoice line.
Project ID	Displays the project ID that is associated with the corresponding invoice line.
From Date/Through Date	Indicates the date range of the billing activity for the corresponding invoice line.
Contract Line Number	Provides the specific line of the contract number that is associated with the corresponding invoice line. Contract offerings appear on the contract as distinct contract line numbers.
Purchase Order Line	Displays the specific line of the purchase order that is associated with the corresponding invoice line.
Employee Name	Displays the name of the employee that is associated with the corresponding invoice line for example, the name of the employee that performed the service for which you are billing.
Return to Invoice Summary	Click this link to return to the Invoices - Invoice Summary page.

Invoice Line Discount and Surcharge Details Page

Use the Invoice Line Discount and Surcharge Details page (BI_LINE_DS_SS) to review all discounts and surcharges that are associated with a specified invoice line.

Navigation:

Click the Discount/Surcharge amount link in the **Invoice Details** group box on the Invoices - Invoice Summary page.

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Field or Control	*Description*
Invoice Line	Displays the invoice line number that carries the listed discounts and surcharges. The invoice line number appears by default from the Invoices - Invoice Summary page.
Description	Provides a short description of the invoice. The description appears by default from the Invoices - Invoice Summary page.
Return to Invoice Summary	Click this link to return to the Invoices - Invoice Summary page.

Invoice Line Tax Details Page

Use the Invoice Line Tax Details page (BI_LINE_TAX_SS) to review all value-added tax and sales or use tax that is associated with a specified invoice line.

Navigation:

Click the Tax Amount value link in the **Invoice Details** group box on the Invoices - Invoice Summary page.

Field or Control	*Description*
Invoice Line	Displays the invoice line number that carries the listed taxes. The invoice line number appears by default from the Invoices - Invoice Summary page.
Description	Provides a short description of the invoice. The description appears by default from the Invoices - Invoice Summary page.
Return to Invoice Summary	Click this link to return to the Invoices - Invoice Summary page.

Note: If sales and use taxes are associated with the selected invoice line, the **Sales/Use Taxes** grid displays the tax amount and tax percent for the specified line.

Email Invoice Copy Page

Use the Email Invoice Copy page (BI_EMAIL_DOCS_SS) to email a copy of the invoice in PDF format to the email address entered.

Navigation:

Click the **Email Invoice Copy** link on the Invoices - Invoice Summary page.

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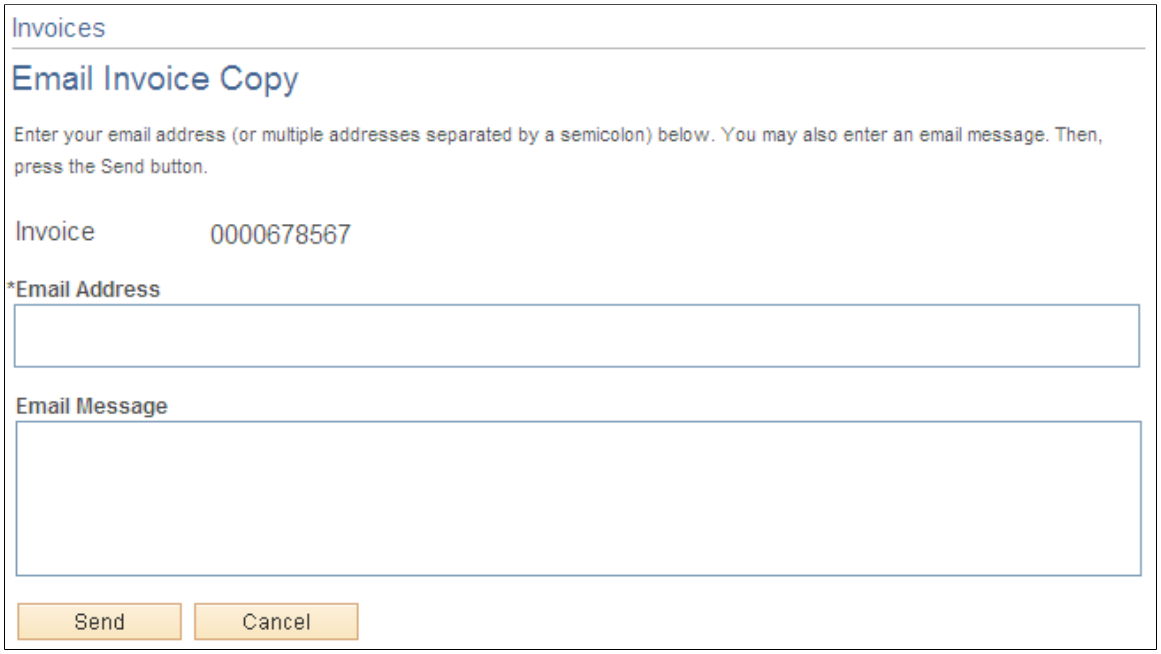
This example illustrates the fields and controls on the Email Invoice Copy page.



Field or Control	*Description*
Email Address	Enter a valid email address and then click the **Send** button to send the copy of the invoice in PDF format. If the message is successfully sent, the system displays the message "Your request for an invoice copy was successful."

Note: If an invoice contains lines that have summarization templates, the system emails a copy in summarized format only.

View Invoice Image Page

Use the View Invoice Image page to view an online rendering of the actual invoice that was mailed to the customer. The user can view the invoice in a PDF format.

Navigation:

- Click the **View Invoice Image** link on the Invoices - Invoice Summary page.
- Click the icon in the View Invoice Image column on the Invoices - Invoice List page.

The **View Invoice Image** link is available only if the **Attach Invoice Image** option was selected for the Business Unit and the invoice image attachment process (BI_XMLPBURST) has been run.

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Viewing Supporting Documentation Attached to an Invoice (Classic)

This topic discusses how customers can view a supporting document. You can attach documents to an invoice header or line using the Billing application.

Page Used to View Supporting Documentation Attached to an Invoice

Page Name	*Definition Name*	*Usage*
View Supporting Documentation Page	BI_ATTACH_SS	View a list of supporting documents that are attached to an invoice.

View Supporting Documentation Page

Use the View Supporting Documentation page (BI_ATTACH_SS) to view a list of supporting documents that are attached to an invoice.

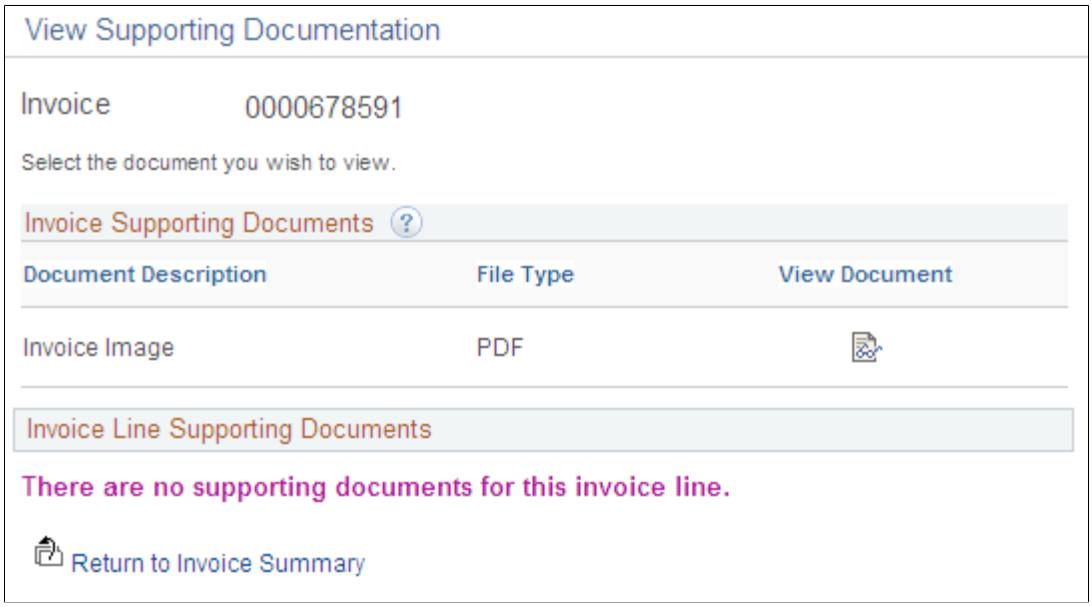
Navigation:

eBill Payment > **Invoices**

Click an invoice number on the Invoice List page and then click the **View Supporting Documentation** link at the bottom of the Invoice Summary page.

Note: The **View Supporting Documentation** link will appear only when documents are attached to the invoice that are not marked as internal only.

This example illustrates the fields and controls on the View Supporting Documentation page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Invoice Documents	Lists documents that are attached at the invoice header level.
Invoice Line Documents	Lists documents that are attached to specific invoice lines.
View	Click to open the document in a browser or associated application.

Note: If the **Attach Invoice Image** option is enabled in Billing, then the invoice image will also be visible from the View Supporting Documentation page.

Viewing Account Information (Classic)

This topic discusses how to review account summary, recent activity, and aging information and view open invoice balance detail.

Pages Used to View Account Summary Information

Page Name	*Definition Name*	*Usage*
Account Balance Page	AR_SUMBAL_SS	Review account summary, recent activity, and aging information.
Account Balance Detail Page	AR_ACCBAL_DET	Review open invoices that make up the balance.

Account Balance Page

Use the Account Balance page (AR_SUMBAL_SS) to review account summary, recent activity, and aging information.

Navigation:

Click the **Account Balance** link from the home page or the side navigation menu.

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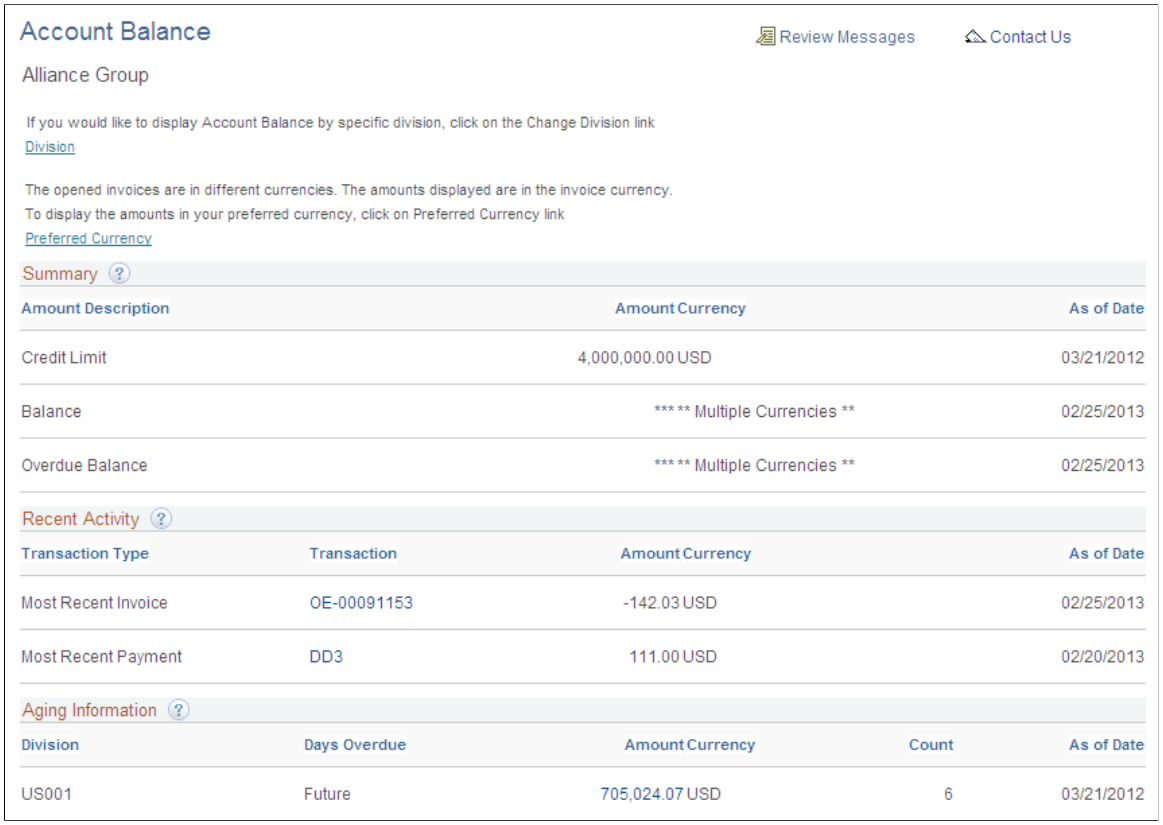
This example illustrates the fields and controls on the Account Balance page.



Field or Control	*Description*
Division	Click this link to access the Division Selection page and select a division, if you have account balance information that is separated by division.
Preferred Currency	Click this link to display the preferred currency that is selected on the My Preferences page in the **Amount** field. The preferred currency appears instead of ***Multiple Currencies***, and the **Preferred Currency** link is replaced by an **Invoice Currency** link. The customer can click the **Invoice Currency** link to display the multiple currencies again.

Summary

The **Summary** group box summarizes the account balance and overdue balance totals. It will display a customer's credit limit if it has been set up.

Field or Control	*Description*
Amount Description	Displays the type of amount in the **Amount** field.

Field or Control	*Description*
Amount	Displays the total balance or overdue balance amount. This field can display multiple currencies. Use the **Amount** link to view open invoices that make up the balance on the Account Balance Detail page. The As of Date is the effective date of the amount.

Note: Total Balance and **Past Due Balance** amounts displayed in PeopleSoft eBill Payment include pending payments (payments submitted but not yet processed by Receivables Update), and therefore may not equal the same amounts as shown in PeopleSoft Receivables.

Recent Activity

The **Recent Activity** group box displays the most recently posted payments or most recent invoice, as well as any credit card payments in progress.

Field or Control	*Description*
Transaction Type	Describes the most recent transactions.
Transaction ID	Identifies the transaction, which can be either an **Invoice ID** or **Payment ID,** depending on the transaction type. The Amount column displays the most recent transaction amount, and the Accounting Date column displays the date of the most recent transaction.

Aging Information

Field or Control	*Description*
Days Overdue	Displays overdue categories, such as *Future, Current, 31-60, 61-90, 91-120,* and *121+* days. These categories may be different, depending on what you define for the aging ID during setup.
Aging Amount	Displays overdue amounts for each overdue aging category; **Aging Count** lists the number of invoices in each aging category. The As of Date is the date that AR_AGING was last run.

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Account Balance Detail Page

Use the Account Balance Detail page (AR_ACCBAL_DET) to review open invoices that make up the balance.

Navigation:

Click the links in the Amount column in the grids on the Account Balance page.

Field or Control	*Description*
Division	Appears if the detail is for a specific division.
Days Overdue	Indicates the category if this detail is for an aging category.
Payment Terms	Displays the time increment for calculating the invoice due date. For example, *Net30.*
In Dispute	Select if the invoice is in dispute.
In Collection	Select if the invoices are in collection.
Add to Cart	Click the **Add to Cart** link to add all eligible invoices on the page to the Payment Cart.
Return to Account Balance	Click to return to the Account Balance page.

Viewing Payment Information (Classic)

This topic discusses how to review pending payments, view payment history information, and view payment history invoice details in PeopleSoft Classic eBill Payment.

Pages Used to View Payment History

Page Name	*Definition Name*	*Usage*
Pending Payments Page	AR_EBP_SCHEDULE	Review payments that have been sent for payment through eBill Payment.
Pending Payment Search Page	AR_EBP_SCHED_SRCH	Search for scheduled payments. See the Pending Payments Page for more information.

Page Name	*Definition Name*	*Usage*
Payment History Page	AR_SSREV_PAYMENTS	Review payments that have been processed in Receivables.
Payment History Search Page	AR_SSSRCH_PAYMENTS	Search for payments that are not listed on the Payment List page. See the Payment History Page for more information.
Payment History - Payment Detail Page	AR_EBP_PAY_SEC	Review payment history information.
Payment History - Invoice Detail Page	AR_EBP_ITEM_SEC	Review payment history details of each invoice.

Pending Payments Page

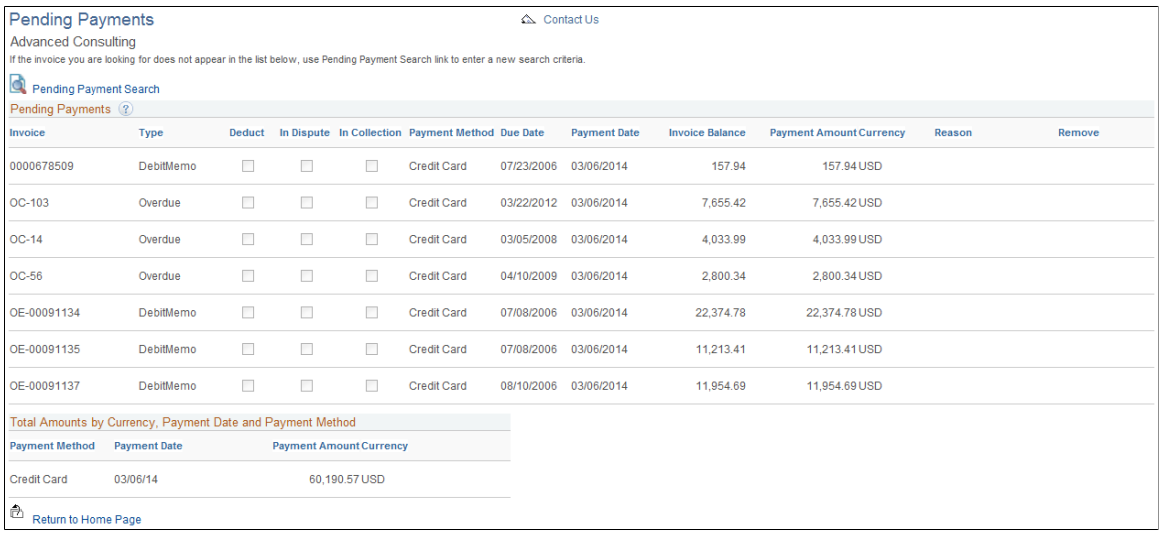
Use the Pending Payments page (AR_EBP_SCHEDULE) to review payments that are pending processing in Receivables.

Customers can view payments that have been received and determine to which invoices the payment was applied. For example, credit, customer service, and sales people can review payment information with a customer while they are on the telephone, essentially looking at the same page for all balance and payment information.

Navigation:

eBill Payment > Pending Payments

This example illustrates the fields and controls on the Pending Payments page.



Pending payments appear on the Pending Payments page until they have been processed by credit card or direct debit processing within Receivables. The system performs validations before removing a pending

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or scheduled payment to make sure that the totals by payment method, currency, and payment date are positive. No longer a scheduled payment, this invoice becomes available again on the Balance Detail page (**eBill Payment** > **Balance Detail**) and the Account Balance page (**eBill Payment** > **Account Balance**). From those pages, you can add the invoice to the Payment Cart again. If you delete a scheduled payment, the invoice is added to the Payment Cart.

Field or Control	*Description*
Remove	Click this icon to remove a scheduled payment from the Pending Payments page. When you submit an invoice for payment using the Credit Card payment method, and the Payment Date is the current date, an authorization is received from the credit card provider and the credit card is billed. In this case, the garbage bin icon is hidden because this scheduled invoice cannot be deleted after authorization.
Pending Payment Search	Click this link to open the Pending Payment Search page (AR _EBP_SCHED_SRCH), where you can search for payments that are not listed on the page and sort results.

Note: If a pending short payment is deleted, the system does not delete the corresponding conversation for the short payment.

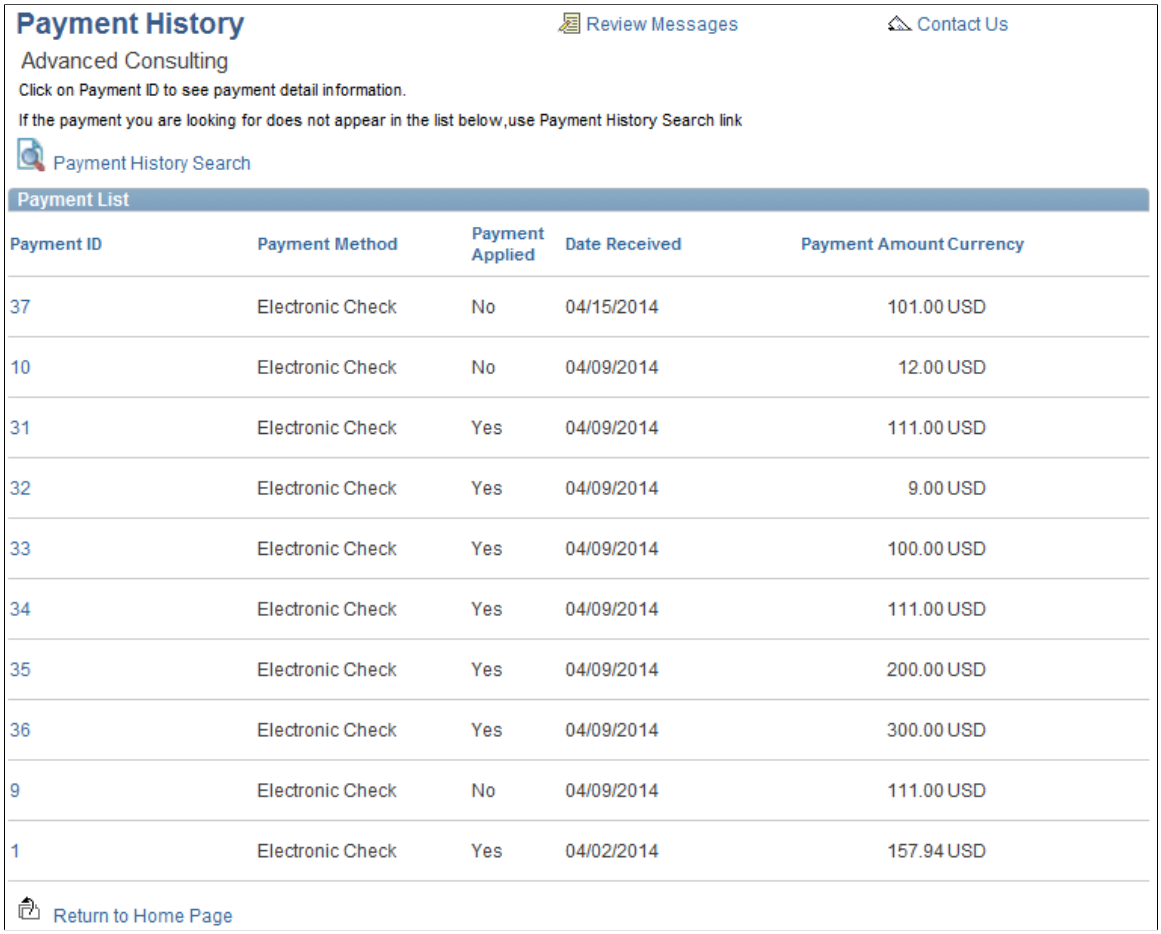
Payment History Page

Use the Payment History page (AR_SSREV_PAYMENTS) to review payments.

Navigation:

- **eBill Payment** > **Payment History**
- Click the **Payment History** link from the home page or the side navigation menu.

This example illustrates the fields and controls on the Payment History page.



Payment ID	Payment Method	Payment Applied	Date Received	Payment Amount Currency
37	Electronic Check	No	04/15/2014	101.00 USD
10	Electronic Check	No	04/09/2014	12.00 USD
31	Electronic Check	Yes	04/09/2014	111.00 USD
32	Electronic Check	Yes	04/09/2014	9.00 USD
33	Electronic Check	Yes	04/09/2014	100.00 USD
34	Electronic Check	Yes	04/09/2014	111.00 USD
35	Electronic Check	Yes	04/09/2014	200.00 USD
36	Electronic Check	Yes	04/09/2014	300.00 USD
9	Electronic Check	No	04/09/2014	111.00 USD
1	Electronic Check	Yes	04/02/2014	157.94 USD

Payment List

Field or Control	*Description*
Payment History Search	Click this link to open the Payment History Search page (AR _SSSRCH_PAYMENTS), where you can search for payments that are not listed on the page and sort results.
Payment ID	Click a **Payment ID** link to view the payment detail on the Payment Detail page. Identifies the payment that is received. The **Payment Applied** field indicates whether the payment has been applied. The date received is the date that the payment is received from the payee, and payment amount indicates the amount that is received.

Payment History - Payment Detail Page

Use the Payment History - Payment Detail page (AR_EBP_PAY_SEC) to review payment detail information.

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Navigation:

Click a **Payment ID** link on the Payment History List page or click the **Transaction ID** link on the Account Balance page.

Payment Detail

Field or Control	*Description*
Payment ID	Identifies the payment. For example, this field may display a check number.
Date Received	Displays the date that the payment is received from the payee.
Payment Applied	Indicates whether the payment is applied.
Date Applied	Displays the date that the payment is posted to the account.
Return to Payment List	Click to return to the Payment List or Account Balance page.

Payment Activity

The **Payment Activity** grid lists the invoices to which the payment is applied.

Field or Control	*Description*
Invoice ID	Click to access the Payment History - Payment Detail page to view payment history details.

Payment History - Invoice Detail Page

Use the Payment History - Invoice Detail page (AR_EBP_ITEM_SEC) to review details of each invoice.

Navigation:

Click an **Invoice** link on the Payment History - Payment Detail page, or anywhere an invoice ID appears as a link in PeopleSoft eBill Payment pages, to view payment history details.

Field or Control	*Description*
Invoice	Displays the invoice ID. If the invoice is loaded from PeopleSoft Billing, this link appears to enable customers to access the Invoice Summary page.

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Field or Control	*Description*
Division	Displays the division, or a cross-section of a business.
Customer	Displays the customer to which the invoice belongs.
Payment Terms	Displays the time increment for calculating the invoice due date and discount terms.
Payment Method	Displays the Payment Method, which can be *CC* (credit card), *DD* (direct debit), or *Check.*
Dispute Reason	Displays the dispute status code that was defined on the Dispute Status page.
Collection Code	Displays the collection status for the invoice that you define on the Invoice Maintenance page.

Viewing Balance Details (Classic)

This topic discusses how to review and pay invoices in PeopleSoft Receivables, schedule to pay on a future date, and search for invoices.

Pages Used to View Balance Details

Page Name	*Definition Name*	*Usage*
Balance Detail Page	AR_EBP_VIEWITEM	Review and pay any invoices in Receivables.
Balance Detail - Invoice Search Page	AR_EBP_ITEM_SRCH	Search for invoices that do not appear in the Balance Detail page list.

Balance Detail Page

Use the Balance Detail page (AR_EBP_VIEWITEM) to review and pay any invoices in Receivables.

Navigation:

eBill Payment > **Balance Detail**

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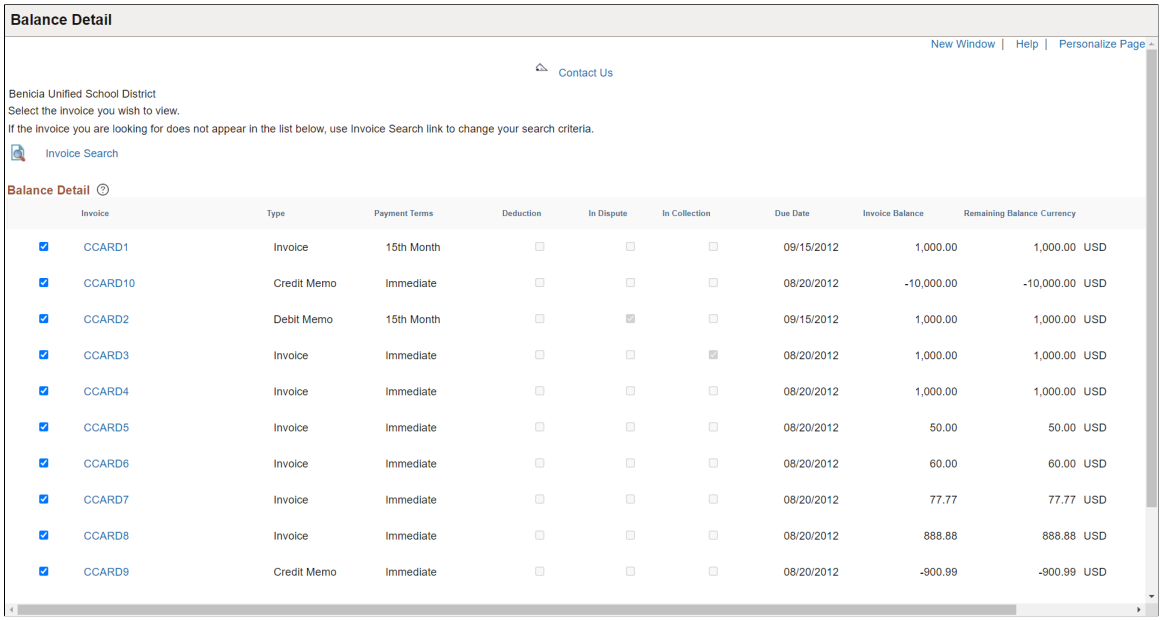
This example illustrates the fields and controls on the Balance Detail page.



Field or Control	***Description***
Invoice	You can click any link in this column to access the Invoice Detail page. If you select the **Allow Change of Payment Method** check box on the “eBill – General Page” (Application Fundamentals), you can select direct debit invoices and change the payment method while making the payment.
Type	Displays the type of invoice.
Payment Terms	Displays the time increment for calculating the invoice due date.
Deduction	Indicates the deduction status of the invoice.
In Dispute	Indicates the dispute status of the invoice.
In Collection	Indicates the collection status of the invoice.
Due Date	Displays the invoice due date.
Invoice Balance	Displays the balance for the invoice.
Remaining Balance Currency	Displays the remaining balance for the invoice, after any payments have been applied.

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Field or Control	*Description*
Add to Cart	Click this button to add the selected invoices to the Payment Cart.

Balance Detail - Invoice Search Page

Use the Balance Detail - Invoice Search page (AR_EBP_ITEM_SRCH) to search for invoices that do not appear on the Balance Detail page.

Navigation:

Click the **Invoice Search** link on the Balance Detail page to view the Balance Detail - Invoice Search page.

Field or Control	*Description*
Type	Specify the type of invoice. For example, Credit Memo or Debit Memo.
In Dispute	Select **Yes** or **No**.
In Collection	Select **Yes** or **No**.
Deduction	Select **Yes** or **No**.
From Due Date	Enter or select a due date from the available options to display all invoices that are generated on or after the specified date. The customer can also enter or select a To Due Date from the available options to display all invoices that are generated on or before the date specified.
Calendar	Click this button to select the month, day, and year parameters by which to filter the From Due Date or To Due Date search.
From Amount	Enter a search parameter for a minimum invoice amount. The system displays all invoices with balance amounts that are greater than or equal to the amount that the customer specifies. In the **To Amount** field, the customer can enter a search parameter for a maximum invoice amount. The system displays all invoices with a total balance that is less than or equal to the amount that the customer specifies.
Currency	Select a currency. The system returns only invoices whose entry currency matches the specified currency.

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Field or Control	*Description*
Sort Invoices by	Sort the search results by the available options in ascending or descending order. For example, the customer wants to search for all invoices that were generated since December 31, 2000, and view the results with the most recent invoices displayed first. The customer enters *12/31/2000* in the **From Due Date** field, selects *Invoice* as the sort by criteria, and sorts the results in descending order.
Search	Click this button after defining the filters to view the results on the Balance Detail page.

Corresponding with Customers (Classic)

A customer can submit messages to service representatives about PeopleSoft Classic eBill Payment issues.

Use the conversations pages to do the following:

- Create and submit conversations.
- View conversation notes.
- Search for conversations.
- Review and respond to customer notes.

Pages Used to Correspond with Customers

Page Name	*Definition Name*	*Usage*
Contact Us Page	SS_CONTACT_US	Create, submit, and review conversations to resolve customer issues.
Review Messages Page	AR_CONVR_LIST_SS	Review a list of messages that are initiated from the Contact Us page.
Review Messages - Messages Search Page	AR_SSSRCH_CONVR	Search for conversations that are older than 90 days.
Review Messages - Message Detail Page	CONVER_DATA4_SS	Review and respond to conversations that customers initiate from the Contact Us page.

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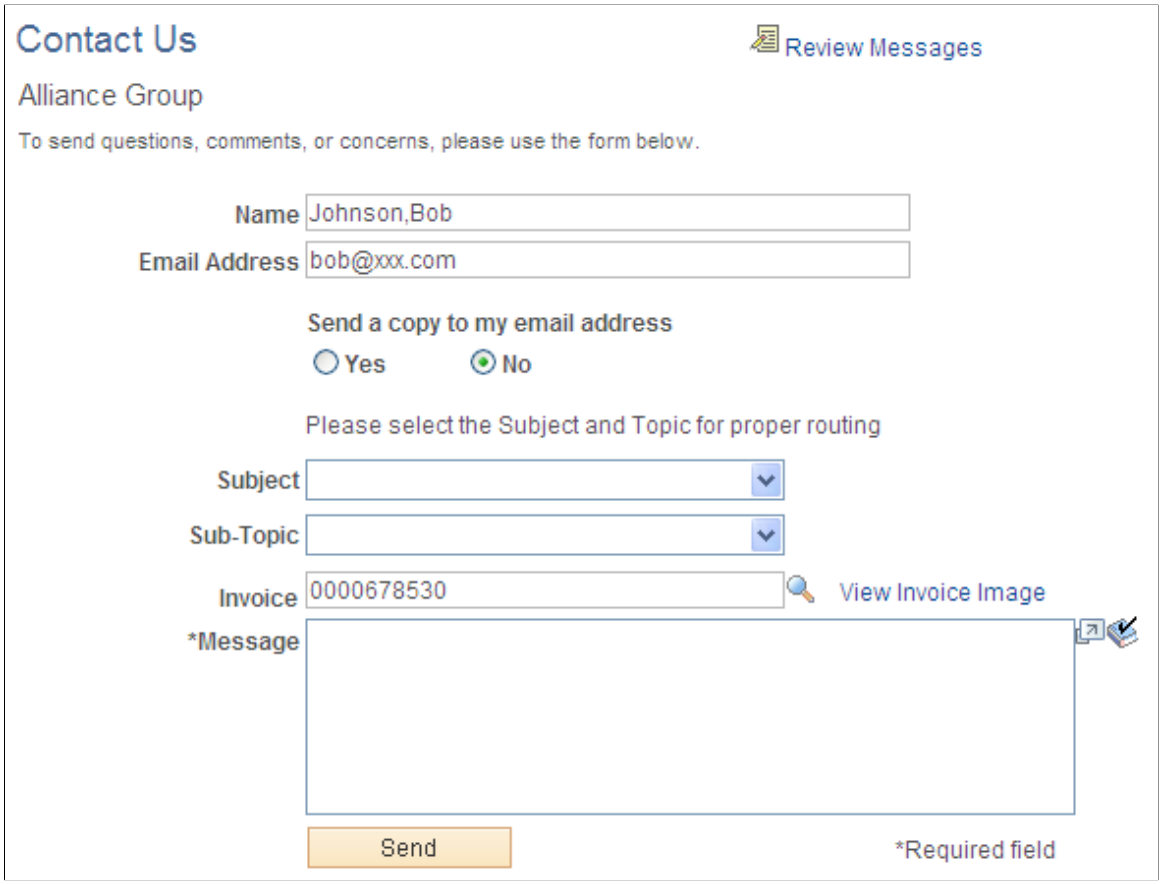
Contact Us Page

Use the Contact Us page (SS_CONTACT_US) to create, submit, and review conversations to resolve customer issues.

Navigation:

Click the **Contact Us** link from the eBill Payment Home page.

This example illustrates the fields and controls on the Contact Us page.



Field or Control	*Description*
Name and **Email Address**	Customers can enter this information if they want to receive confirmation emails. Name and email address values initially appear by default from the Profile page.
Send a copy to my email address	Select **Yes** to send the customer an email copy of the message. The default value is **No**.

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Field or Control	*Description*
Subject and **Sub-Topic**	A customer can select a subject and topic from the available options, which administrators must previously set up on the Conversation Subject page. Both of these fields are used to route notes to the appropriate person in an organization. **Note:** On the Conversation Subject page, select the **Use in eBill Payment** option for the corresponding subject topic.
Invoice	Displays the invoice number.
Message	An open text field in which the customer can enter a message. This field cannot be left blank.
View Invoice Image	Click this link to view an image of the invoice. The link will open the invoice image in a separate window. Link is visible only when invoice image is available.
Review Messages	Click this link to review the existing conversations. If on the Invoice Summary page or Account Balance – Invoice Detail page, messages are filtered by the invoice. Link is hidden if the represented customer does not have any conversation entry.

When a conversation is created, an email is sent to all internal users. The email will contain the conversation URL that will allow the user to navigate directly to the conversation. Email notifications for newly created conversations are sent only if the Role Name is associated with the chosen Subject and Topic and if users exist who are members of that Role. If the selected Subject and Topic combination has an Action Code and Action Owner tied to it, then an action list will be created for the conversation.

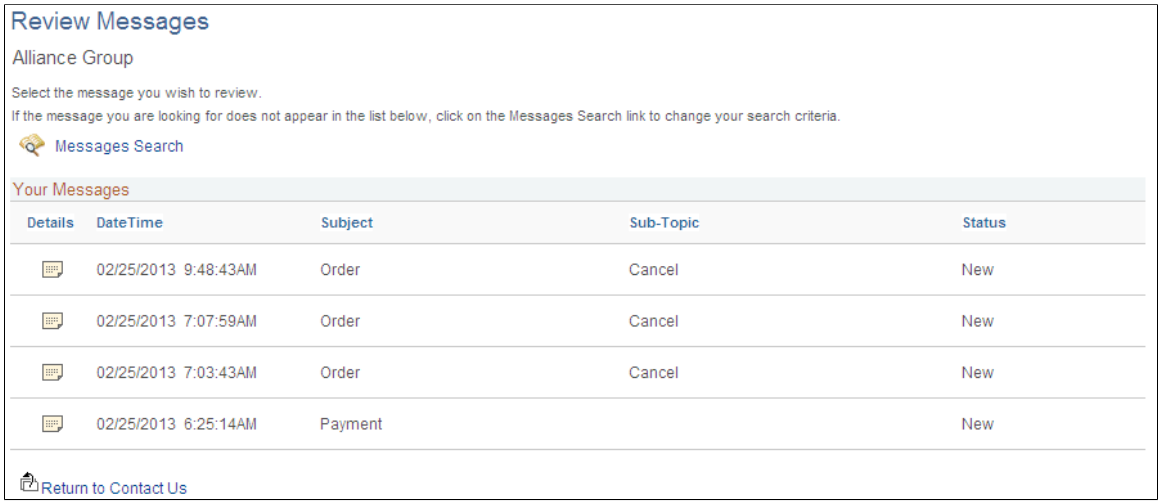
Review Messages Page

Use the Review Messages page (AR_CONVR_LIST_SS) to review a list of messages that is initiated from the Contact Us page.

Navigation:

Click the **Review Messages** button on the Contact Us page.

This example illustrates the fields and controls on the Review Messages page.



Your customers, brokers, and salespersons can review responses from conversations that are initiated from the Contact Us page. The list displays messages that were initiated within the last three months. You can view messages that are older than 90 days by using the **Messages Search** link. Customers can select a message link to review a note and enter a response. Click the **Return to Contact Us** link to open the Contact Us page.

Review Messages - Messages Search Page

Use the Review Messages - Messages Search page (AR_SSSRCH_CONVR) to search for conversations that are older than 90 days.

Navigation:

Click the **Messages Search** link on the Review Messages page.

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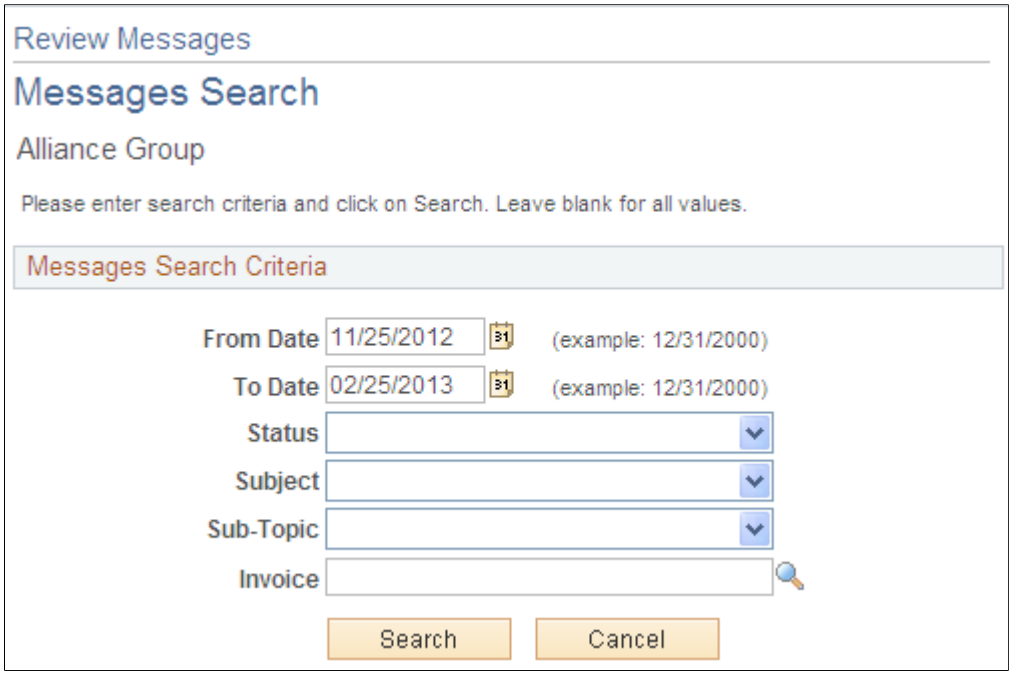
This example illustrates the fields and controls on the Review Messages - Messages Search page.



Customers can use these option to define their searches:

Field or Control	*Description*
From Date	A customer can enter or select a date from the available options to display notes that are generated on or after the specified date.
To Date	A customer can enter or select a date from the available options to display notes that are generated on or after the specified date.
Status	Indicates the conversation status.
Subject	Customers search by subject from the available options, which are set up by the administrator.
Sub-Topic	Customers search by subject topic from the available options, which are set up by the administrator.
Invoice	Customers search by invoice from the invoice list.
Cancel	Click this button to go back to the Messages List.

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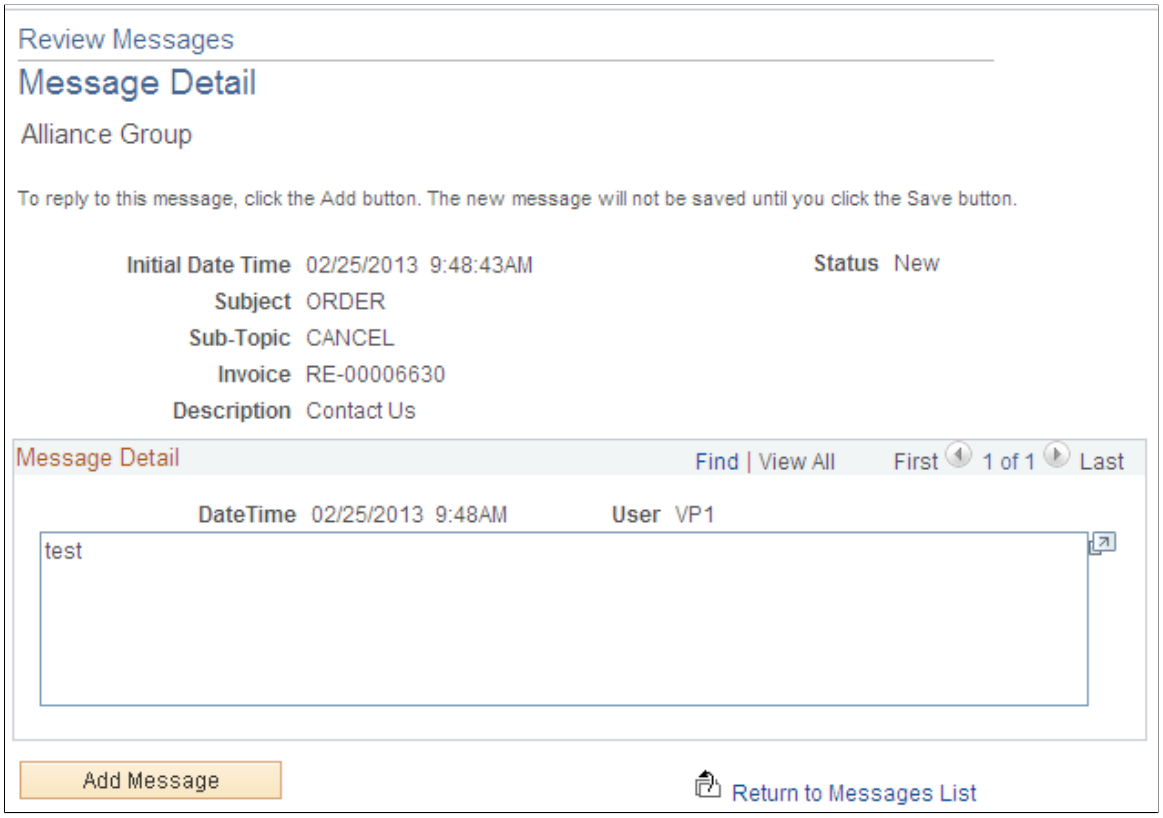
Review Messages - Message Detail Page

Use the Review Messages - Message Detail page (CONVER_DATA4_SS) to review and respond to conversations that customers initiate from the Contact Us page.

Navigation:

Click the **Detail** link from the Review Messages page.

This example illustrates the fields and controls on the Review Messages - Message Detail page.



The routing of the note is based on the role name that is identified within the subject setup table.

Field or Control	*Description*
Subject and **Sub-Topic**	Displays the subject and the sub-topic of the message.
Invoice	Displays the invoice entered on the Contact Us page. May also display the text "Multiple Invoices," indicating that the conversation entry has multiple invoices and was created in the Payment Cart using Short Pay. **Note:** If a pending short payment is deleted, the corresponding conversation will be left as is.
Add Message	Click the **Add Message** button to continue the dialog with the AR agent.

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Field or Control	*Description*
Return to Messages List	Click the **Return to Messages List** link to return to the list of messages.
Save	Enter a value in the **Message Detail** text box and then click this button to save your response. This button initially appears after the**Add Message** button is clicked.

Allowing Self-Service Administrators to Create Additional Users

Pages Used to Create Additional Users

Page Name	*Definition Name*	*Usage*
Permission Lists Page	ACL_GENERAL	Add a permission list to give access to users.
Roles Page	ROLEDEFN	Add a role for a new user and associate the new role with a permission list.
User Profiles - General Tab Page	USER_GENERAL	Add a new user profile. See Creating a Template Profile Using the User Profile Page.
Customer Registration Setup Page	CUST_REG_SETUP	Define the template user ID and default SETID to be used when a customer contact is added.
Administer Users - Select Contact Page	EB_CONTACT_SRCH_SS	Add a new user or update an existing user.

Understanding How Self-Service Administrators Create Additional Users

External administrators can create new user IDs for additional users without having to request AR or BI administrators (internal administrators) to perform the task for them.

The Customer Registration Setup component allows internal administrators to define a template User ID that can be used when external administrators add new users to the system. All properties from the template User ID are copied to the new user added. Any common role security that eBill Payment external users need should be defined in the template User ID definition.

The Administer Users component allows external administrators to add and modify user profiles. Users who are granted security permission can perform various actions (based on their security profile), such as viewing and paying invoices, viewing and paying account balances, and so on.

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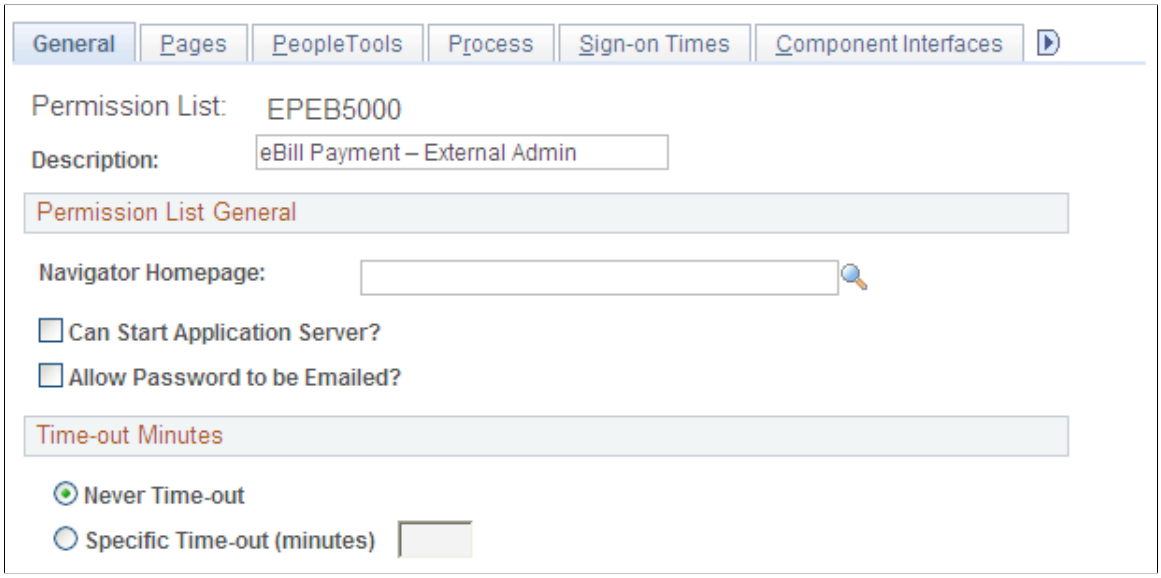
Permission Lists Page

Use the Permission Lists page (ACL_GENERAL) to add a permission list to give access to users.

Navigation:

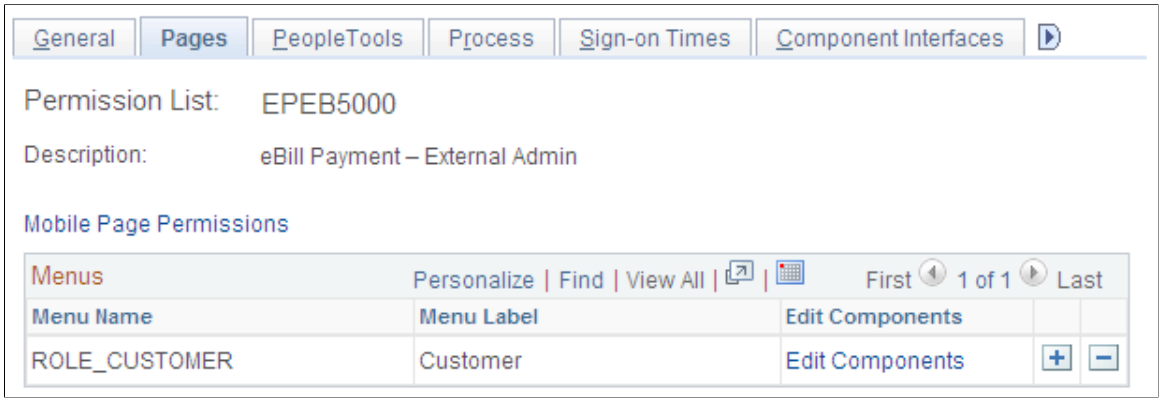
PeopleTools > **Security** > **Permissions & Roles** > **Permission Lists**

This example illustrates the fields and controls on the Permission Lists - General tab for the (EPEB5000) permission list.



Add a permission list to give access to Administer Users (EB_CNCT_USER_ADMIN) component pages in the Customer (ROLE_CUSTOMER) menu. The new permission list must have full access to CONTACT_INFO, CUSTOMER_CONTACT, and USER_PROFILE component interfaces.

This example illustrates the fields and controls on the Permission Lists - Pages tab.



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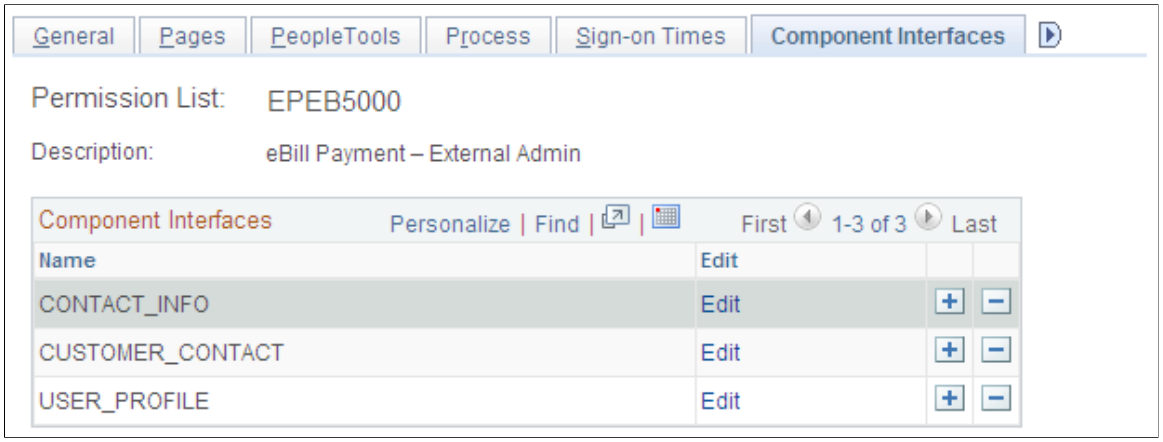
This example illustrates the fields and controls on the Permission Lists - Component Interfaces tab.



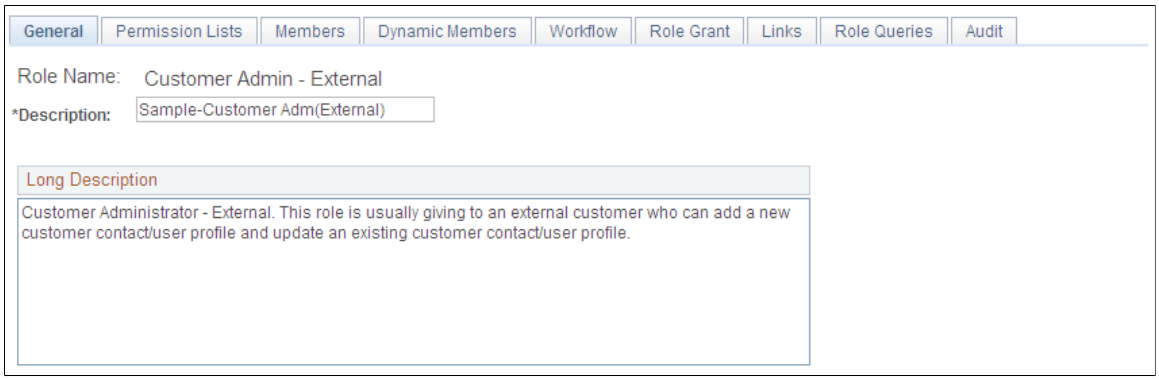
Roles Page

Use the Roles page (ROLEDEFN) to add a role for the new user and associate the new role with a permission list.

Navigation:

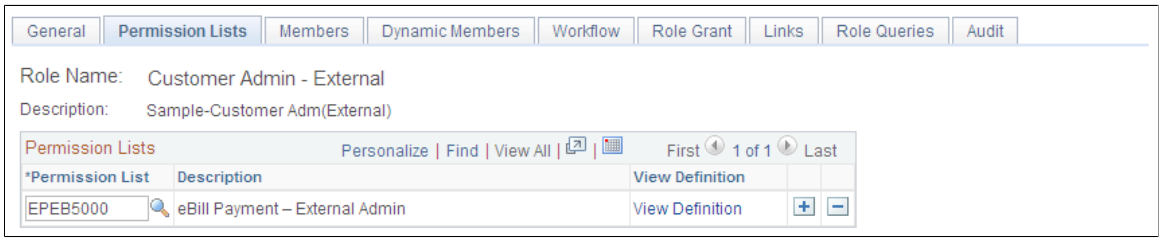
PeopleTools > **Security** > **Permissions & Roles** > **Roles**

This example illustrates the fields and controls on the Roles - General tab.



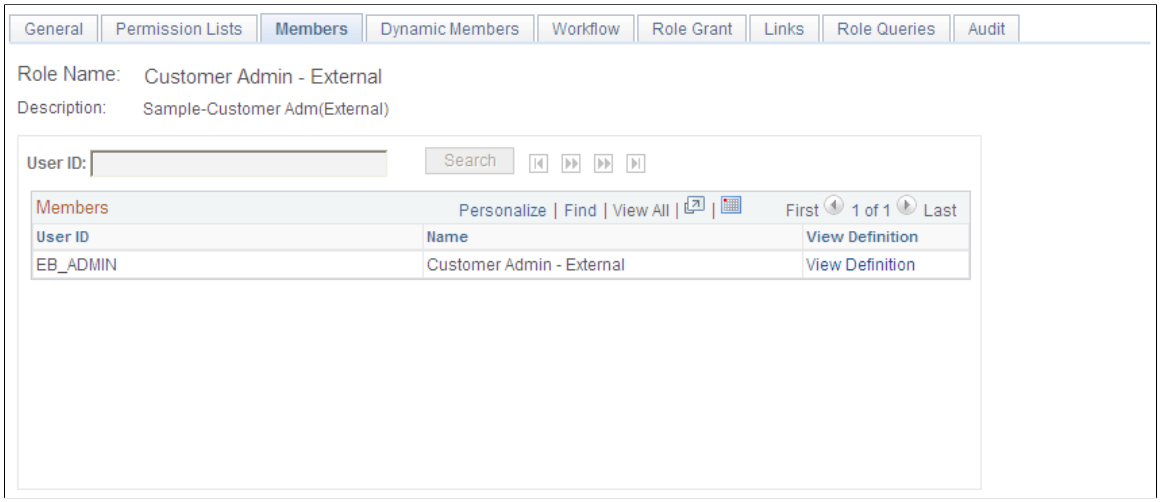
Use the Permission Lists tab to link the new role to the permission list created for the external administrator.

This example illustrates the fields and controls on the Roles - Permission Lists tab.



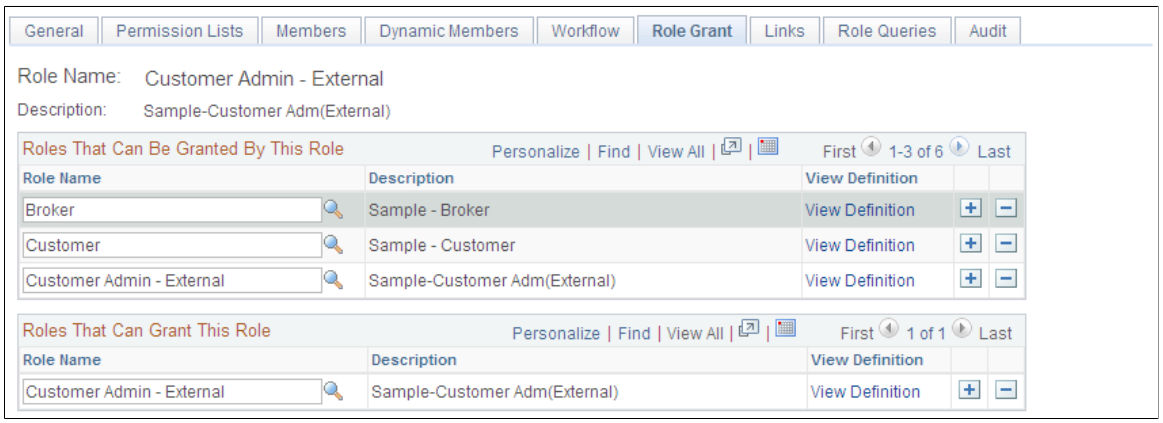
The Members list will be populated automatically when the user profile is associated with the role.

This example illustrates the fields and controls on the Roles - Members tab.



Associate the new role with other roles that can be granted by this role and the role that can grant this new role.

This example illustrates the fields and controls on the Roles - Role Grant tab.



User Profiles - General Tab Page

Use the User Profiles page (USER_GENERAL) to add a new user profile.

Navigation:

PeopleTools > **Security** > **User Profiles** > **User Profiles**

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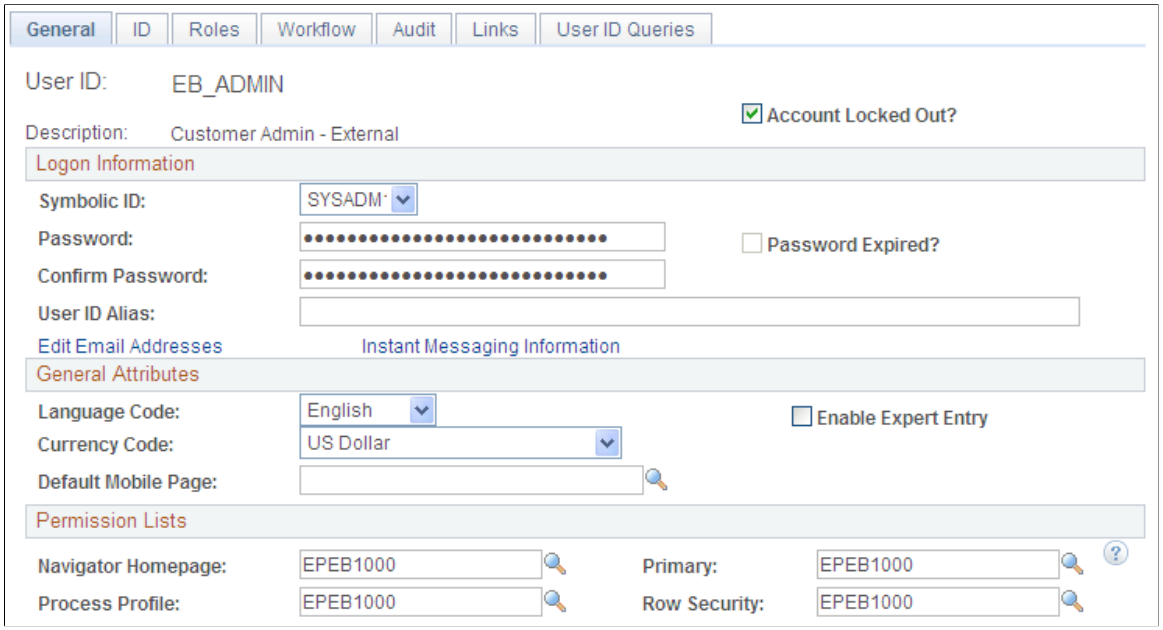
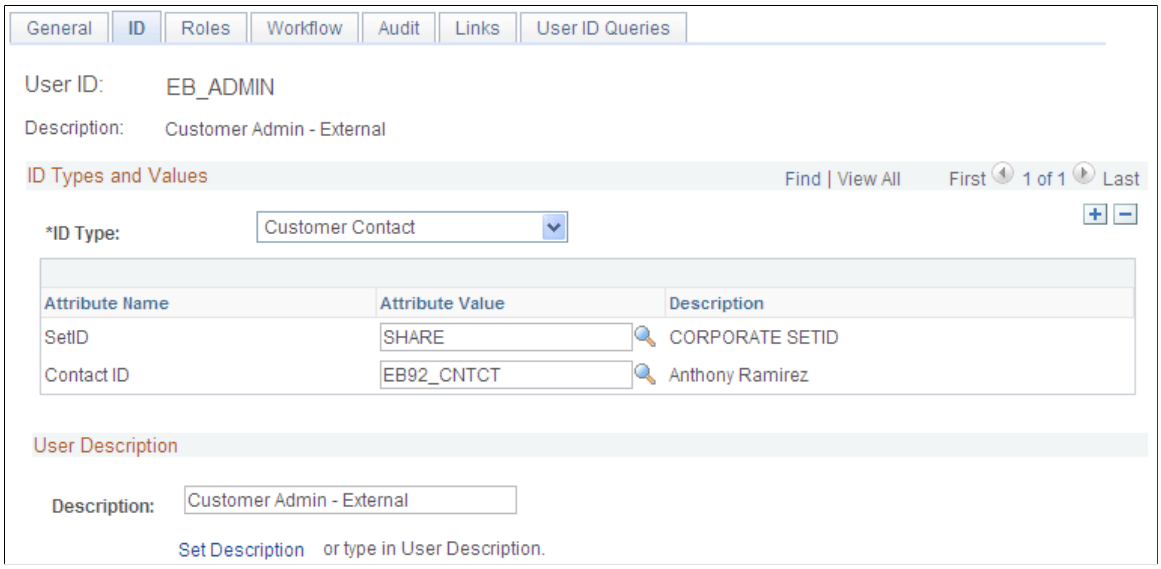
This example illustrates the fields and controls on the User Profiles - General tab.



Assign permission list to the user profile and the ID Type Customer Contact. Also, associate the new user with a customer contact.

This example illustrates the fields and controls on the User Profiles - ID tab.



Use the Roles tab to assign roles to the new user.

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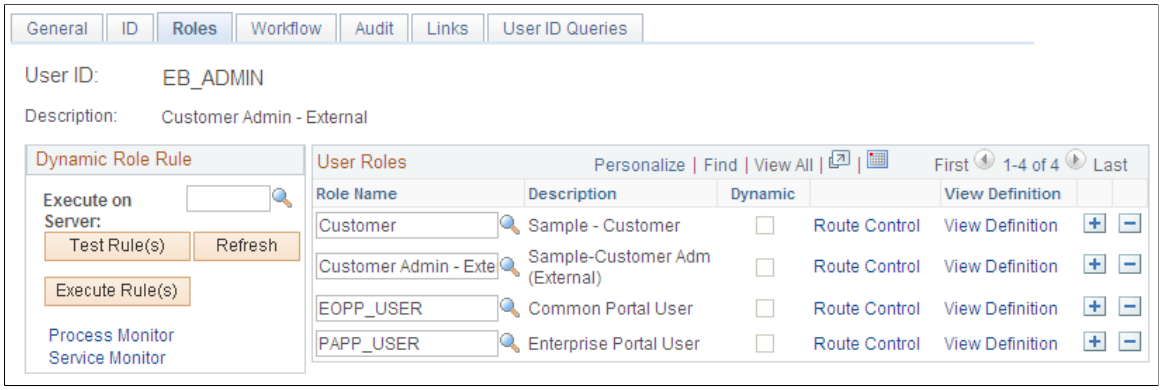
This example illustrates the fields and controls on the User Profile - Roles tab.



Creating a Template Profile Using the User Profile Page

Use the User Profile page to add a user profile to be used as a template profile.

Navigation:

PeopleTools > **Security** > **User Profiles** > **User Profiles**

All properties of this template user profile will be copied to the new user/contact that the external administrator creates.

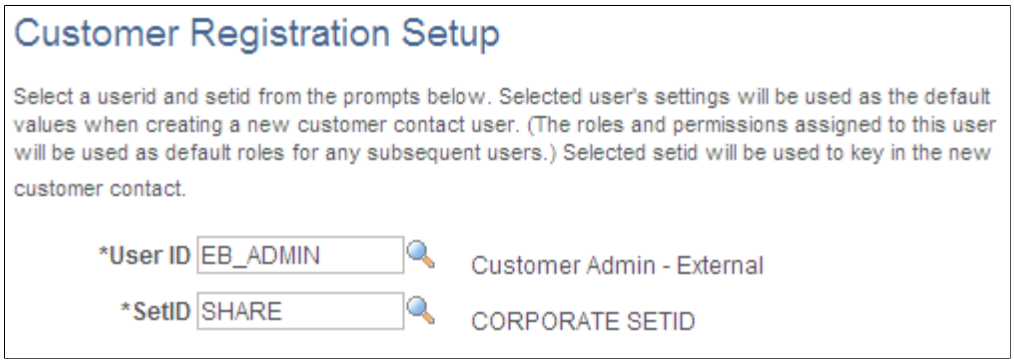
Customer Registration Setup Page

Use the Customer Registration Setup page (CUST_REG_SETUP) to define the template user ID and default SetID to be used when a customer contact is added.

Navigation:

Set Up Financials/Supply Chain > **Common Definitions** > **Customers** > **Customer Registration Setup**

This example illustrates the fields and controls on the Customer Registration Setup page.



Define the template User ID and default SetID to be used when the external administrator creates a customer contact/user.

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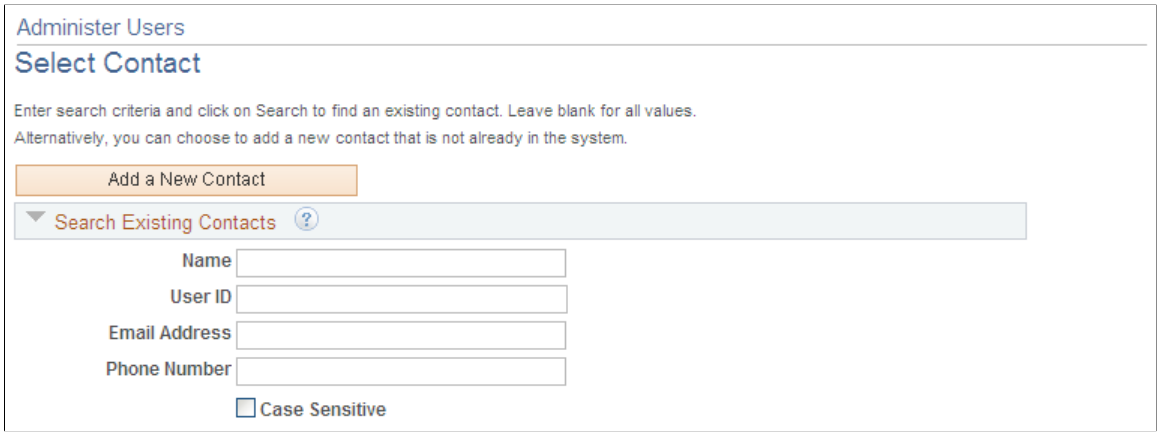
Administer Users - Select Contact Page

Use the Administer Users - Select Contact page (EB_CONTACT_SRCH_SS) to add a new user or update an existing user.

Navigation:

eBill Payment > **Administer Users**,

This example illustrates the fields and controls on the Administer Users - Select Contact page.



The Administer User page allows external administrators to add new user accounts. The administrator has the option to either add a new contact or perform a search to see if the contact is already defined in the system.

If the administrator chooses to add a new customer contact/user, the system will display a page where the administrator can populate the contact information and the security roles for the new customer contact/user. A grid will appear that shows all invoice-to customers for whom the administrator has security. The administrator selects the customer ID for which the new contact should be able to access data. The prompt on role will only display roles the external administrator is allowed to grant.

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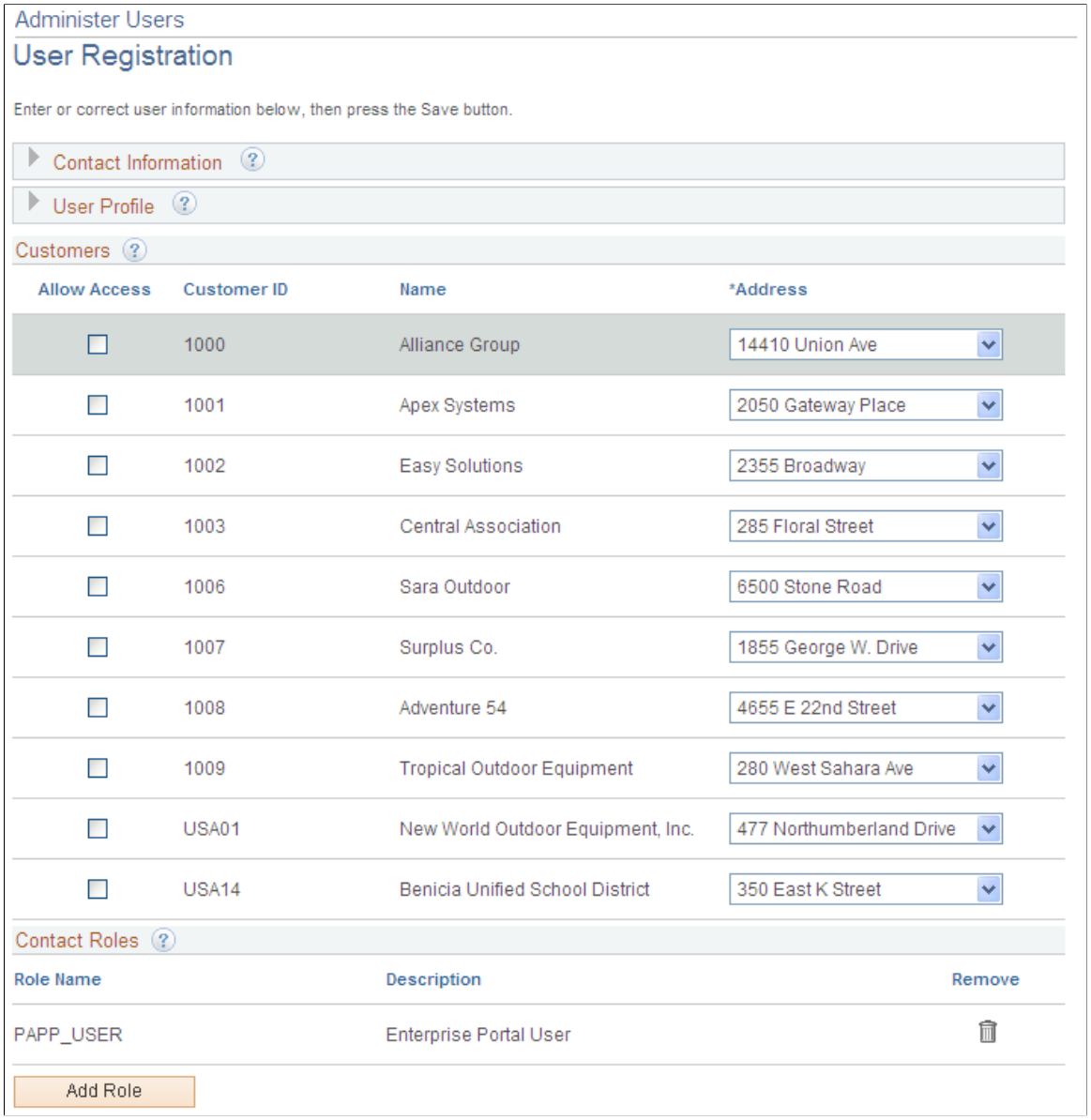
This example illustrates the fields and controls on the Administer Users - User Registration page.



If the customer contact/user already exists in the system, then the system will display the Manage User Profile page with the fields filled out in update mode. The administrator can make updates if required. Select the **Inactivate Contact** check box to inactivate the customer's contact. The **User ID** field is display-only and cannot be updated. Select the **Lock Out User ID** check box to lock the user profile. This check box corresponds to the locked out check box on the Tools User Profile page. Selecting this check box will prevent the user from logging into the system.

Using the Customer Hierarchy (Classic)

Use the Customer Hierarchy page to view the hierarchy chart in PeopleSoft Classic eBill Payment only.

Note: This feature is no longer supported. However, a fluid version of the Customer Hierarchy functionality is supported on the eBill Payment Home Page. See Using the Customer Hierarchy (Fluid).

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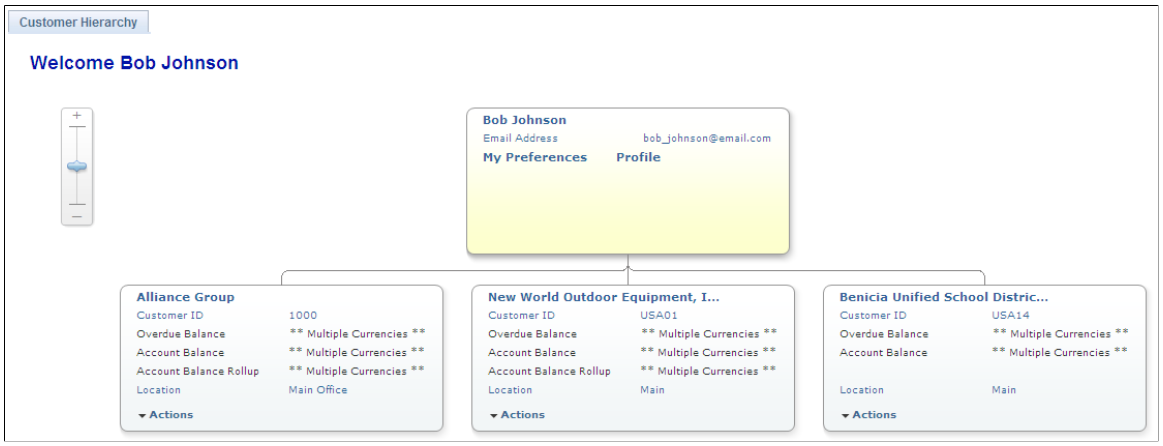
Navigation:

eBill Payment > Customer Hierarchy

The Customer Hierarchy can also be launched from a link located on the PeopleSoft Classic eBill Payment Quick Links pagelet.

This example illustrates the fields and controls on the Customer Hierarchy page.



The Customer Hierarchy chart, once initiated, allows users to navigate to each customer to view current balances, related information, and to perform certain actions for that customer.

Click the Customer Hierarchy folder to display the customer hierarchy chart. The customer hierarchy chart will be built based on the broker that is signed on. All customers that do not have parent customers represented by the broker will appear as child nodes of the broker in the chart. All customers represented by the broker that have a parent represented by the broker will appear as a child node of the represented parent.

The customer hierarchy chart is built using row-level security for the broker. Customers set up to be represented by the broker will only appear in the chart. A break in the hierarchy chain would be caused if the broker does not have row-level security for the child that is represented but does have row-level security for a grandchild. In this case, the system displays the grandchild as a child node of the broker.

A drop-down list of related actions is defined to enable users to navigate to different Classic eBill Payment components to perform actions for a customer. Users will not be restricted to selecting actions for the chart in focus. A user may select an action from any node on the chart, thus enabling the user to process payments for any customer in the hierarchy. The drop-down list options for related actions are Invoices, Account Balance, Payment Cart, and Statements. Click any of the options in the drop-down list to navigate to the corresponding Classic eBill Payment component.

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Chapter 4

Making Payments in PeopleSoft eBill Payment

Understanding Payments in PeopleSoft Classic eBill Payment

This topic provides an overview of the payment process in PeopleSoft Classic eBill Payment and common elements used in the Classic Payment Cart.

Understanding the PeopleSoft Classic eBill Payment Process

PeopleSoft Classic eBill Payment enables customers to pay invoices over the Internet using the Classic Payment Cart. The Payment Cart integrates specifically with PeopleSoft Receivables. You cannot use this application with a generic accounts receivable subsystem.

Invoices eligible for payment can be selected from various eBill pages such as the Balance Detail page and the Invoice Summary page (click the **Invoice** link on the Invoice List page). To add an invoice to the payment cart, the invoice must have:

- A status of Open.
- A current balance not equal to 0.00 USD.

Note: When you select the **Allow Change of Payment Method** check box on the "eBill – General Page" (Application Fundamentals), you can select direct debit invoices and change the payment method while making the payment.
Check items in the Payment Cart can be changed to direct debit within the cart.

The customer can use the Payment Cart to accumulate invoices before making a payment. The Payment Cart holds only invoices belonging to one customer at a time. When the customer attempts to add invoices for a second customer, the system prompts the customer that the invoices in the cart belonging to the first customer will be replaced.

Invoices in the cart can be paid in full (pay entire balance) or short pay (pay a partial amount of the invoice). Depending on the system setup, you can choose from these payment methods:

- Credit card
- Direct debit
- Electronic check
- PayPal

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The credit card payment method is available in either the traditional model (systems that store, process, and maintain credit card data) or the hosted model (systems that use third-party payment processing and storage).

The electronic check payment method is supported in systems set up to support ePayments. After selecting the Electronic Check payment method, the user is transferred to the hosted payment supplier's site for payment completion. (The ePayment processing system does not support future or scheduled payments.)

To short pay an invoice, the user must provide a short pay reason and comments.

After a payment is successfully processed, the system removes fully paid invoices from the Payment Cart. The invoice is retained in the cart for short payments.

When the customer chooses to short pay an invoice and adds comments, the system generates a conversation containing the reason and comments that are provided. The customer can review the conversation on the Review Messages page.

Prerequisites

The Electronic Check payment option requires ePayment setup with a third-party payment processor. The PayPal payment method option requires a PayPal merchant account. See the product documentation for *PeopleSoft Integration Interfaces*.

You must also set up your PeopleSoft Receivables system to support ePayments through the self-service component, eBill Payment:

- See "Setting Up ePayment Profiles" (PeopleSoft Receivables).
- See Setting Up Electronic and Credit Card Payment Options.

Common Elements in the Payment Cart

Field or Control	*Description*
Exit	Click this button to leave the Payment Cart page.
Save	Click this button to save your work.
Next	Click this button to go to the next step. The label for this button changes programmatically based on which step in the horizontal navigation the user is on; it could change to **Pay All**, **Submit Payment**, or **Payment Cart**.
Previous	Click this button to return to the previous step.
Review Messages	Click to view customer messages. This link is visible when customer messages exist.
Contact Us	Click to create a Contact Us note for the transaction.

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Field or Control	*Description*
Select All	Click the **Select All** button to select all of the invoices in the cart for payment.
Deselect All	Click the **Deselect All** button to deselect all of the selection check boxes in the payment cart. These invoices remain in the payment cart.
Clear Cart	Click to remove all of the invoices from the Payment Cart. The system prompts the customer for confirmation before removing the invoices. The system then changes the Payment Method to the default value and saves the Payment Cart.
Invoice Attachments	Click to view or add supporting documentation as attachments.

Making Traditional Credit Card Payments (Classic)

This topic discusses how to make credit card payments in Classic eBill Payment systems using a traditional credit card implementation. A horizontal navigation guides you through each step in the payment process.

Pages Used to Make Traditional Credit Card Payments

Page Name	*Definition Name*	*Usage*
Payment Cart - Step 1 of 4	AR_EBP_PAYCART_WZ1	Displays the contents of the payment cart and initiates the payment process. A horizontal navigation is provided for each step in the payment process.
Short Pay Reason Page	SH_PAY_RSN_TBL	Set up valid reason options that a customer can select when they elect to short pay. The options that you define here are available to customers on the Payment Cart page. See the “Short Pay Reason Page” (PeopleSoft Receivables) for more information.
Credit Card Partial Payments Page	AR_EBP_PPCC_SEC	View a list of partial credit card payments for the invoice (available in both hosted and traditional credit card models). See Payment Cart - Step 1 of 4 for more information.

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Page Name	*Definition Name*	*Usage*
Make Payment - Step 2 of 4	AR_EBP_PAYCARD_WZ2	Initiate the payment process.
Payment Amount Detail Page	AR_EBP_PITM_SEC	Review details about the invoices for the corresponding amount.
Payment Confirmation: Enter Credit Card Info - Step 3 of 4	AR_EBP_PAY_CRCARD	Enter credit card information to pay an invoice.
Credit Card Selection Page	AR_CC_SELECT_SS	Displays the credit cards on file for the customer contact and allows the customer to select one. See Payment Confirmation: Enter Credit Card Info - Step 3 of 4 for more information.
Payment Confirmation: Verify Credit Card Info - Step 3 of 4	AR_EBP_PAY_VERF_CC	Review credit card information before submitting for payment.
Payment Results - Step 4 of 4	AR_EBP_PAY_CONF_CC	Review the transaction results, and if the results are successful, receive a credit card authorization number.

Understanding How to Make Traditional Credit Card Payments

The Payment Cart displays the following steps for payments made using a credit card on systems using the traditional credit card model:

1. Payment Cart
2. Make Payment
3. Payment Confirmation

   Note: Credit card confirmation includes two sub-steps: 1. Enter Credit Card Information and 2. Verify Credit Card Information.

4. Payment Results

Note: When the system detects an error in any step, the subsequent steps are locked until the error is fixed.

The Payment Cart and Make Payment steps are the same for credit card payments in both hosted credit card and traditional credit card systems. However, if you are using the *Credit Card* payment method in a hosted credit card implementation, you will see less credit card information on the Payment Confirmation step and the Payment Results step is different. See Making Hosted Credit Card Payments (Classic).

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Payment Cart - Step 1 of 4

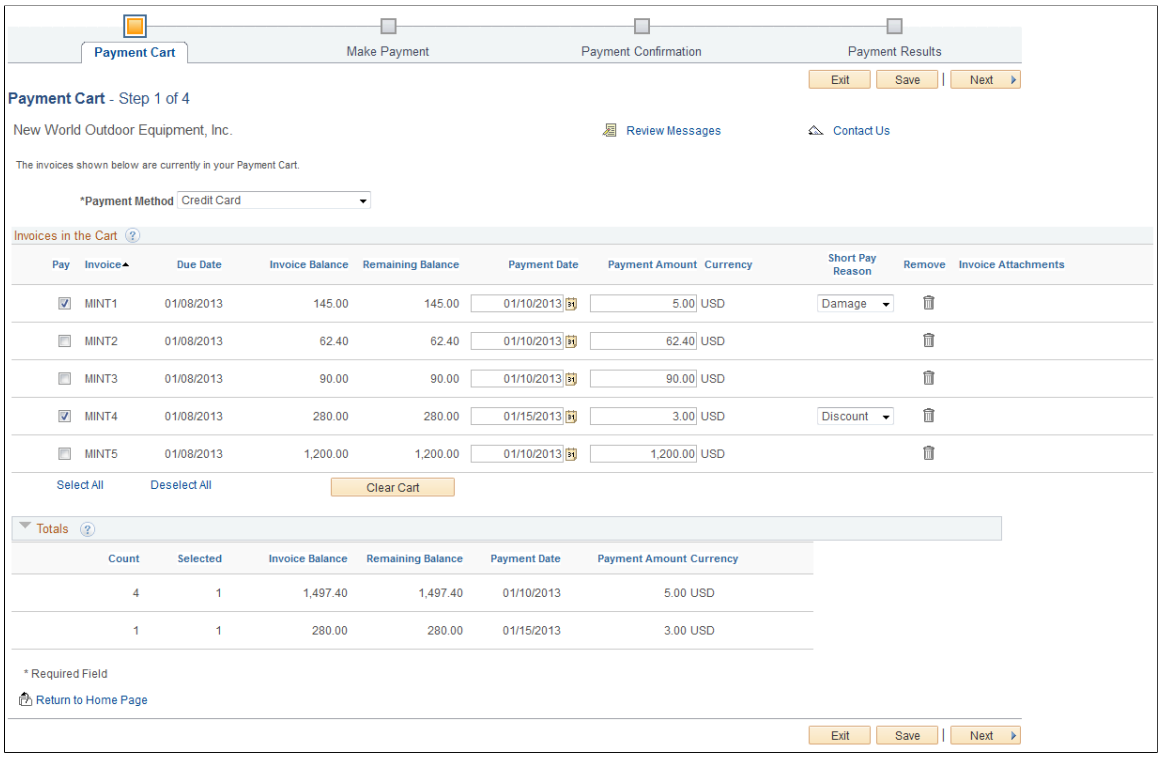
Use the Payment Cart page (AR_EBP_PAYCART_WZ1) to display the contents of the payment cart and initiate the payment process.

This page is the same for credit card payments in both the hosted and traditional models.

Navigation:

- Click the **Add to Cart** button that is located on pages displaying invoices.
- Click the **Payment Cart** link from the Menu.

This example illustrates the fields and controls on the Payment Cart - Step 1 of 4 for a credit card payment (traditional model).



Field or Control	*Description*
Payment Method	Select *Credit Card* from the available options. The system uses the payment method that is defined on the My Preferences for eBill Payment page as the default value.

Invoices in the Cart

Customers can select the corresponding check box for the invoices they want to pay.

Field or Control	*Description*
Payment Date	The current system date is the default. Enter a future date for scheduled payments.
Payment Amount	The system uses the value in the **Customer Balance** field as the default for this field. However, the customer can use the PeopleSoft eBill Payment Short Pay feature by overriding this value with an amount that is less than the customer balance. If Customers choose to short pay the invoice, they must select a short pay reason. You set up the short pay reasons on the Short Pay Reason page. The system displays an error message and marks the payment line in error if a customer does not provide a short pay reason. **Note:** Invoices with negative amounts can be added to the payment cart, but the total Payment Amount cannot be negative. An error message appears if the total Payment Amount for a currency in the cart is negative.
Currency	The payments are grouped by currency. The customer can make a payment in a currency only if the total payment amount is greater than 0.00 USD.
	Click to access the Credit Card Partial Payments page (AR_EBP_PPCC_SEC), where you can view the partial payments done by credit card for that specific invoice.

Note: The **Invoice Balance** and **Payment Amount** fields will reflect the partial payment that has been made. An invoice will be removed from the Payment Cart only if the payment is fully paid.

Make Payment - Step 2 of 4

Use the Make Payment - Step 2 of 4 page (AR_EBP_PAYCARD_WZ2) to initiate the payment process.

Navigation:

Click the **Next** button on the Payment Cart - Step 1 of 4 page.

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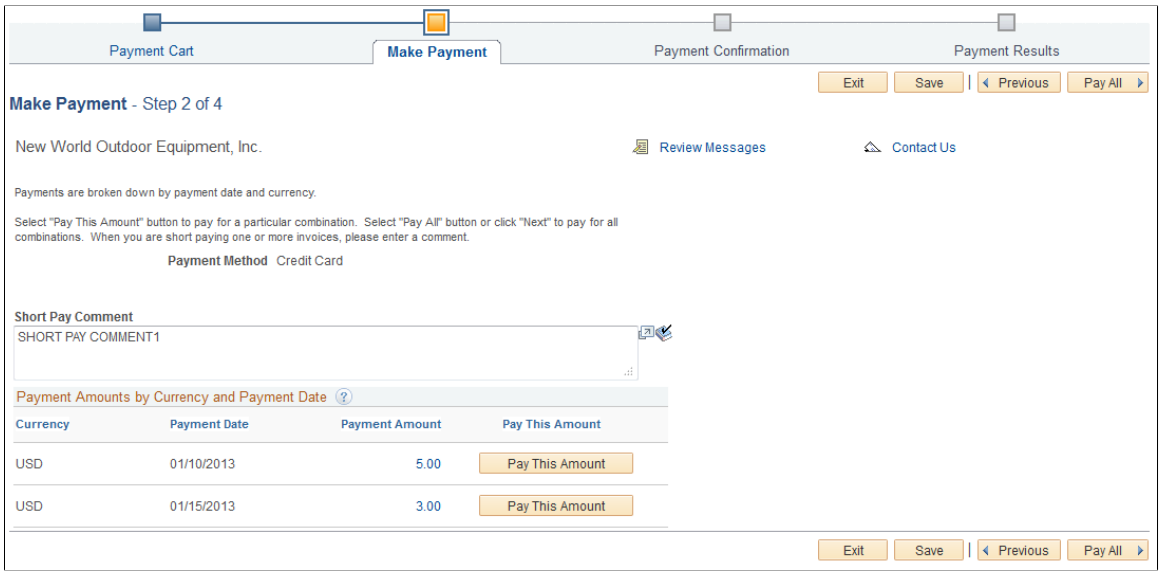
This example illustrates the fields and controls on the Make Payment - Step 2 of 4 for a credit card payment (traditional model).



Field or Control	*Description*
Payment Method	Displays the Payment Method used.
Short Pay Comment	Enter or modify the text in this field when short paying an invoice. If customers short pay an invoice and enter nothing in this field, the system generates an error message when they attempt to go to the next step.
Pay All	Click this button to pay all payments using one click. This button appears for multiple credit card or direct debit payments per currency and payment date.

Payment Amounts by Currency and Payment Date

Field or Control	*Description*
Currency	Displays payments grouped by currency.
Payment Date	Displays the payment date or the default date entered on the Payment Cart page.

Field or Control	*Description*
Pay This Amount	Appears as a button next to each payment amount when customers select multiple payments. The customer can click the button to initiate a payment for a particular currency or click **Pay All** to make payments for all currencies. When customers select *Credit Card* as the payment method and click either of these buttons, they navigate to the Payment Confirmation page, where they can enter the credit card information that is needed to pay the invoice. The system creates separate credit card transactions for each currency to be paid.
Payment Amount	Click a payment amount link to navigate to the Make Payment - Payment Amount Detail page, where customers can review details about invoices for the corresponding amount.

Payment Amount Detail Page

Use the Payment Amount Detail page (AR_EBP_PITM_SEC) to review details about the invoices for the corresponding amount.

Navigation:

Click the **Payment Amount** link on the Make Payment page.

Field or Control	*Description*
Payment Amount	Displays the sum of all invoices in the Payment Cart for the corresponding currency and date. The details of each invoice that is included in the payment amount total for the corresponding currency and date appear in the **Invoices in the Cart** group box.

Payment Confirmation: Enter Credit Card Info - Step 3 of 4

Use the Payment Confirmation: Enter Credit Card Info page (AR_EBP_PAY_CRCARD) to enter credit card information to pay an invoice.

Navigation:

Click **Next** or **Pay All** or **Pay This Amount** on the Make Payment - Step 2 of 4 page

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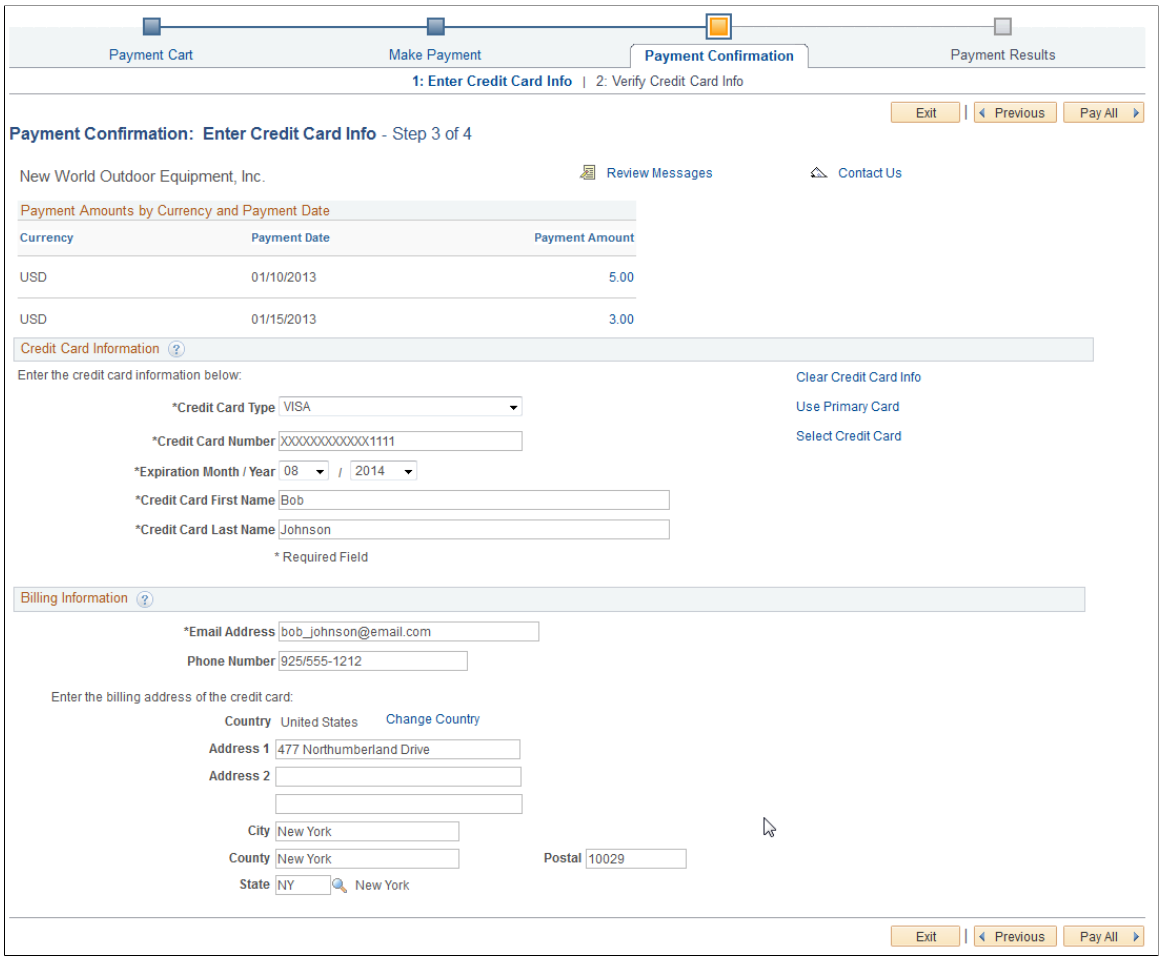
This example illustrates the fields and controls on the Payment Confirmation: Enter Credit Card Info - Step 3 of 4 page (traditional model).



Payment Amounts by Currency and Payment Date

Field or Control	*Description*
Payment Amount	Click a payment amount link in this column to navigate to the Make Payment - Payment Amount Details page, where a customer can review the invoice details for the corresponding currency.
Payment Date	Displays the payment date entered in the Make Payment page.

Note: When a customer chooses to pay invoices with a credit card, the system creates a separate credit card transaction and separate payments for each currency and date.

Credit Card Information

Field or Control	*Description*
Credit Card Information	This group box contains fields that are generally required by third-party credit-card software suppliers. All of the information in this group box is required. The system retrieves default values for all credit card information from the primary credit card that is defined on the Contact Addl Info (contact additional information) page for the contact that is currently signed in. If the system does not find default credit card information, the customer must supply values for the required fields.

Note: The customer can overwrite any information that appears by default in the **Credit Card Information** and **Billing Information** group boxes. However, the system does not write back to the contact's credit card profile on the Contact Addl Info page any credit card data that is entered in either of these group boxes. The system uses the information that the customer enters on this page for the current transaction only.

Field or Control	*Description*
Credit Card Type	Select a credit card type. You set up these codes on the Credit Card Type page. Card types are available to customers if you designated them as active when you set them up.
Credit Card Number	If customers enter a value that does not match the parameters that you set up for the card type on the Credit Card Type page, an error message appears, and they cannot proceed until correcting the error. The validation is against the following: • Number of digits. For example, a customer cannot enter a card number of 17 digits for a card type that requires 16. • Prefix of the credit card number. For example, a customer cannot enter a card number with a prefix of 1234 for a card type that requires a prefix of 5678. **Note:** This field appears only in systems that use the traditional credit card model. The credit card number is masked and only the last four digits are shown.

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Field or Control	*Description*
Select Credit Card	Click this link to access the Credit Card Selection page (AR_CC_SELECT_SS) that displays the credit cards on file for the customer contact and allows the customer to select one.
Clear Credit Card Info	Click to clear all the credit card and billing information shown on the page.
Use Primary Card	Click to have the system provide the default primary credit card of the primary contact of the represented customer.

Note: The **Card Expiration Year** field (CR_CARD_EXPYR) contains translate values for valid expiration years. You must periodically review and update this field with valid expiration year values.

Billing Information

Field or Control	*Description*
Your Email Address and **Phone Number**	Both fields are required.
Country	If the country that corresponds to the credit card's billing address is incorrect, the customer can click **Change Country** to access the Lookup Country Basic Search page and search for a billing address country by name or by three-character country code.
Address 1, Address 2, and **Address 3**	The customer can use these fields to enter the billing address for the credit card that is specified.

Note: The **Billing Information** group box displays fields that are specifically required for the third-party credit-card software suppliers. If the installation integrates with a different third-party software, you may need to configure this page to contain only those fields that are necessary for the third-party software integration. Additionally, you may need to configure the **Billing Information** group box such that the fields that are required by the third-party credit card software supplier are marked with an asterisk.

See the product documentation for *PeopleTools: Integration Broker Service Operations Monitor*.

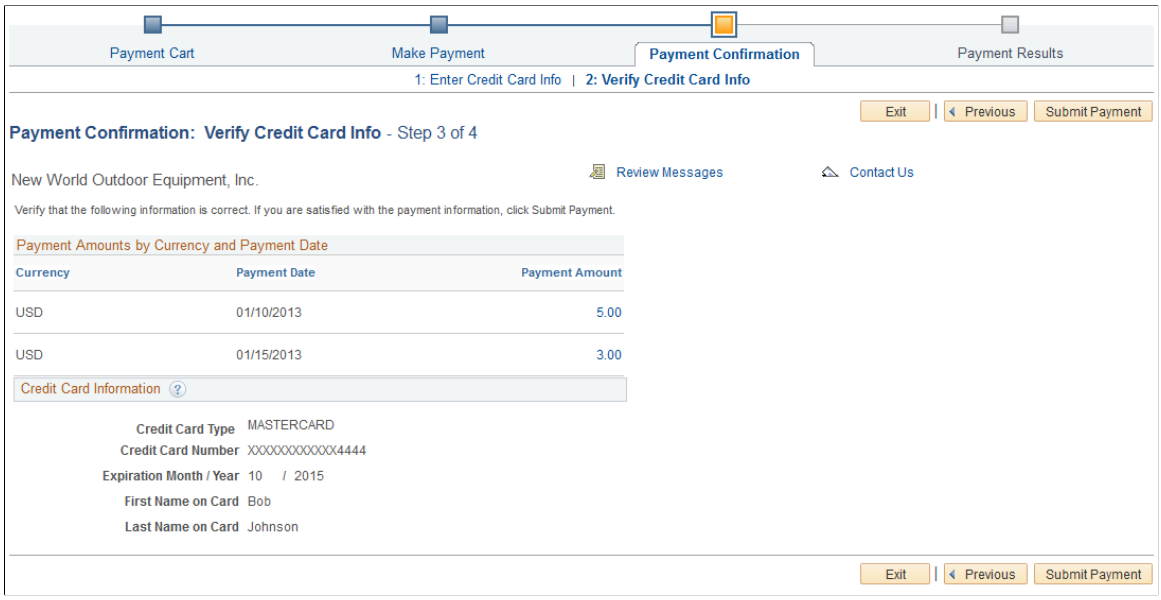
Payment Confirmation: Verify Credit Card Info - Step 3 of 4

Use the Payment Confirmation: Verify Credit Card Info page (AR_EBP_PAY_VERF_CC) to review credit card information before submitting for payment.

Navigation:

Click the **Next** button on the Payment Confirmation: Enter Credit Card Info page.

This example illustrates the fields and controls on the Payment Confirmation: Verify Credit Card Info - Step 3 of 4 page (traditional model).



Payment Amounts by Currency and Payment Date

Field or Control	*Description*
Payment Amount	Click a payment amount link in this column to navigate to the Make Payment - Payment Amount Detail page and review the invoice details for the corresponding currency.
Payment Date	Displays the payment date entered on the Payment Confirmation: Enter Credit Card Info page or the default.

Verification Information

Verify the credit card information.

Field or Control	*Description*
Submit Payment	Click this button to proceed with the payment transaction if the verification information is correct. The system connects to the credit card interface that sends the credit card transaction to the third-party credit card authorization and payment application.

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Receiving a Successful Credit Card Authorization

If the credit card authorization is successful:

1. The system changes the payment method for all open invoices that are in the Payment Cart to credit card.

   The system enters a row for the credit card transmission into the PeopleSoft Receivables Credit Card History table (PS_CRCARD_AR_HST).

2. The system enters a row into the Credit Card Payments table (PS_CRCARD_PAYMENT) for each invoice that is successfully paid. The system inserts a row into the eBill Pending Payments table (PS_AR_EBP_SCHEDULE) for each future-dated payment.

   PeopleSoft Receivables uses the Credit Card Payments table for payment processing.

3. The Payment Results page appears and displays results.

Note: The system enters one row into the Credit Card Payments table for each invoice in the payment cart. However, only one transmission per currency is made to the third-party credit card authorization and payment application.

Receiving an Unsuccessful Credit Card Authorization

If the credit card authorization was not successful:

1. The system enters a row for the credit card transmission into the PeopleSoft Receivables Credit Card History table (PS_CRCARD_AR_HST).

   Only errors that are found during a transmission are written to the history table. Errors that are detected prior to transmission are not logged to the history table.

2. The Payment Results page appears with a description of the failure.

Payment Results - Step 4 of 4

Use the Payment Results page (AR_EBP_PAY_CONF_CC) to review the transaction results and, if the results are successful, to receive a credit card authorization number.

Navigation:

Click the **Submit Payment** button on the Payment Confirmation: Verify Credit Card Info - Step 3 of 4 page (traditional credit card model).

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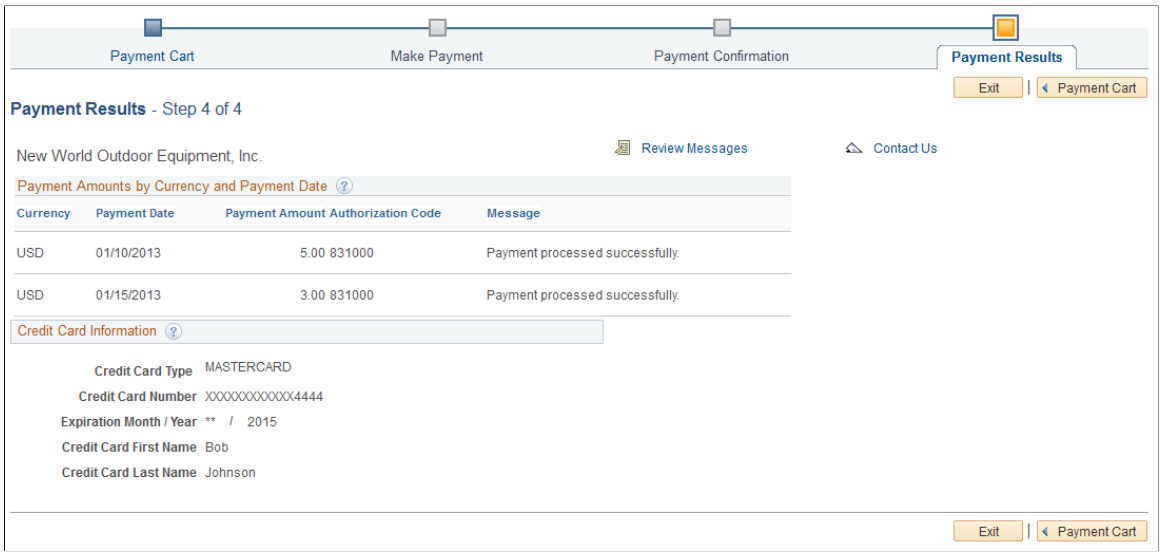
This example illustrates the fields and controls on the Payment Results - Step 4 of 4 page (traditional credit card model).



Payment Amounts by Currency and Payment Date

Field or Control	*Description*
Currency	Review the payment process transaction results for the corresponding currency.
Payment Date	Displays the entered payment date or the default.
Authorization Code	Displays the approval code that is assigned to this transaction upon authorization and appears automatically after a successful processing call to the third-party credit card authorization and payment application. Available only for *Credit Card* payment method.
Message	Displays messages returned by the payment processor.

Note: If all of the payment transactions fail, the **Make Payment** button appears so that the customer can return to the Make Payment page for changes.

Field or Control	*Description*
Make Payment	Click this button to return to the Make Payment page. The customer may, for example, want to return to this page to process any remaining currencies.

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Field or Control	*Description*
Payment Cart	Click this button to return to the first step in the payment process.

Making Direct Debit Payments (Classic)

This topic discusses how to make direct debit payments using Classic eBill Payment.

Pages Used to Make Direct Debit Payments (Classic)

Page Name	*Definition Name*	*Usage*
Payment Cart - Step 1 of 4	AR_EBP_PAYCART_WZ1	Displays the contents of the payment cart and initiates the payment process. A horizontal navigation is provided for each step in the payment process.
Short Pay Reason Page	SH_PAY_RSN_TBL	Set up valid reason options that a customer can select when they elect to short pay. The options that you define here are available to customers on the Payment Cart page. See the “Short Pay Reason Page” (PeopleSoft Receivables) for more information.
Make Payment - Step 2 of 4	AR_EBP_PAYCARD_WZ2	Initiate the payment process.
Payment Amount Detail Page	AR_EBP_PITM_SEC	Review details about the invoices for the corresponding amount. See the Payment Amount Detail Pagefor more information.
Payment Confirmation - Step 3 of 4	AR_EBY_PAY_VERF_DD	Review direct debit account information before submitting for payment.
Payment Results - Step 4 of 4	AR_EBP_PAY_CONF_DD	Confirm that the payment transaction was successful.

Understanding How to Make Direct Debit Payments

Before you begin, set up all direct debit account information with a customer service representative. Customers cannot modify direct debit bank account information through PeopleSoft eBill Payment.

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The Payment Cart displays the following steps for payments made by direct debit:

- Payment Cart
- Make Payment
- Payment Confirmation
- Payment Results

Note: When the system detects an error in any step, the subsequent steps are locked until the error is fixed.

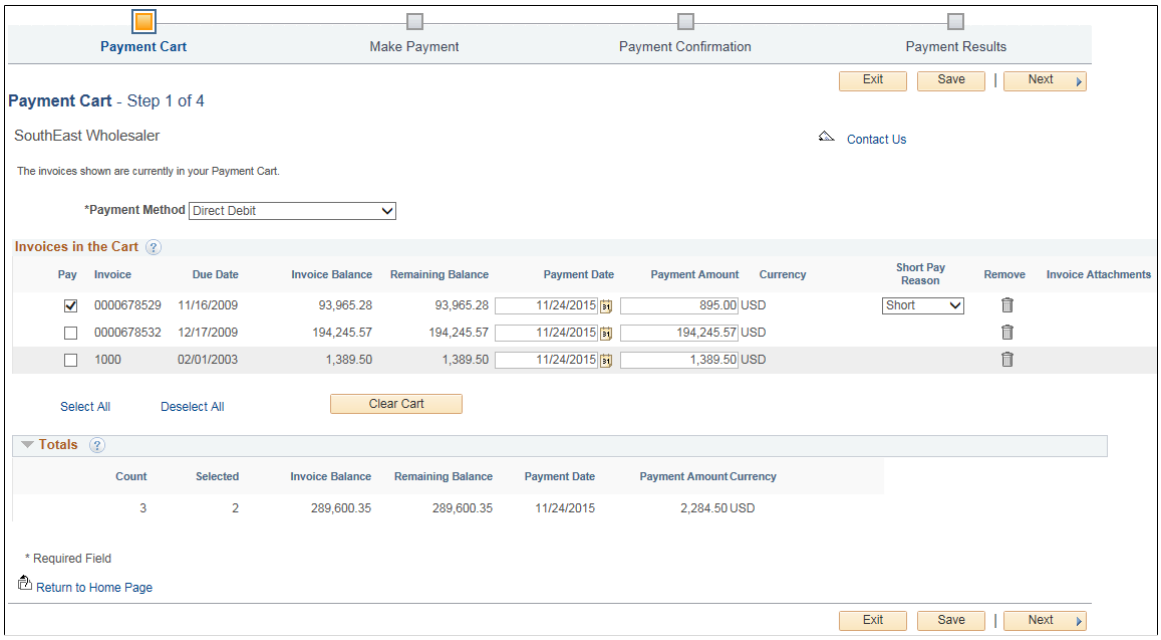
Payment Cart - Step 1 of 4

Use the Payment Cart page (AR_EBP_PAYCART_WZ1) to display the contents of the payment cart and initiate the payment process.

Navigation:

- Click the **Add to Cart** button that is located on pages displaying invoices.
- Click the **Payment Cart** link from the Menu.

This example illustrates the fields and controls on the Payment Cart - Step 1 of 4 for a direct debit payment. In this case, the customer selected a single invoice in the Payment Cart.



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Field or Control	*Description*
Payment Method	Select *Direct Debit* from the available options. An error message displays if direct debit is not set up for the customer. The system uses the payment method that is defined on the My Preference page as the default value.

Note: The **Invoice Balance** and **Payment Amount** fields will reflect the partial payment that has been made. An invoice will be removed from the Payment Cart only if the payment is fully paid.

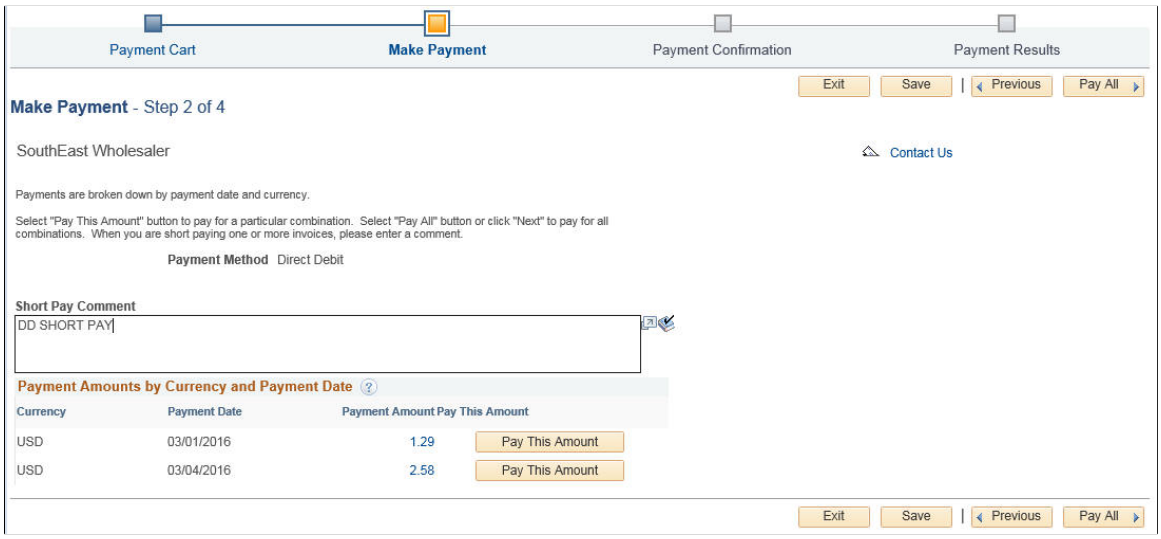
Make Payment - Step 2 of 4

Use the Make Payment page (AR_EBP_PAYCARD_WZ2) to initiate the payment process.

Navigation:

Click the **Next** button on the Payment Cart - Step 1 of 4 page.

This example illustrates the fields and controls on the Make Payment - Step 2 of 4 for a direct debit payment. In this case, the customer selected multiple invoices in the Payment Cart.



Field or Control	*Description*
Payment Method	Displays the Payment Method used.

Payment Amounts by Currency and Payment Date

Field or Control	*Description*
Currency	Displays payments grouped by currency.
Payment Date	Displays the payment date or the default date entered on the Payment Cart page.
Pay This Amount	Appears as a button next to each payment amount when customers select multiple payments. Click this button to initiate a payment for a particular currency or click **Pay All** to make payments for all currencies. When customers select *Direct Debit* as the payment method and click either of these buttons, they navigate to the Make Payment - Direct Debit Payment Verification page, where they can verify that the direct debit and banking information is correct.
Payment Amount	Click a payment amount link to navigate to the Payment Amount Detail page, where customers can review details about invoices for the corresponding amount.

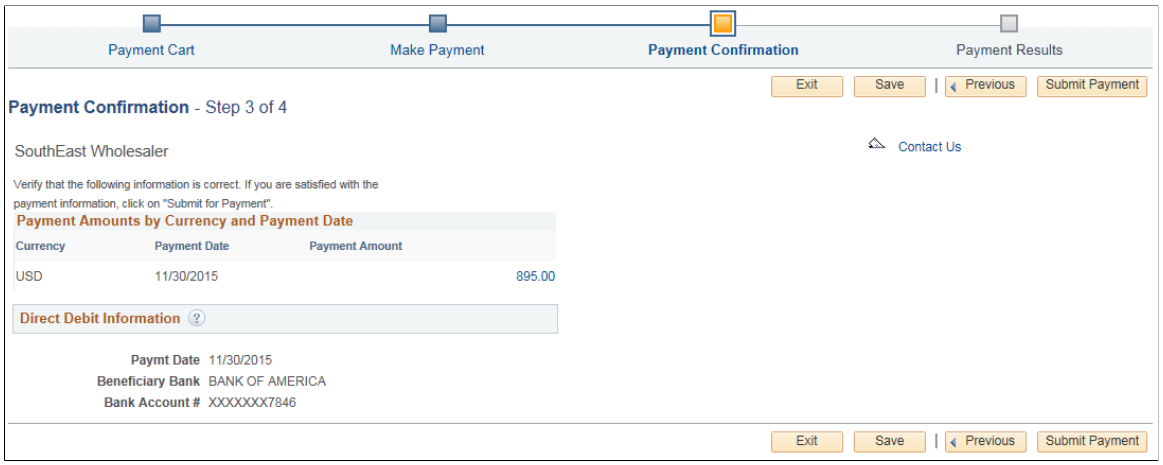
Payment Confirmation - Step 3 of 4

Use the Payment Confirmation page (AR_EBY_PAY_VERF_DD) to review direct debit account information before submitting for payment.

Navigation:

Click the **Next** button on the Make Payment - Step 2 of 4 page.

This example illustrates the fields and controls on the Payment Confirmation - Step 3 of 4 for a direct debit payment.



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Field or Control	*Description*
Pay This Amount	Appears as a button next to each payment amount when customers select multiple payments with different payment dates. Click this button to initiate a payment for a particular date or click **Pay All** to make payments for all dates.
Submit Payment	Click this button to proceed with the payment transaction, if the verification information is correct, and to view the Payment Results page (AR_EBP_PAY_CONF_DD). The system changes the payment method for all open invoices in the Payment Cart to direct debit and sets the direct debit profile ID to the customer's profile ID.

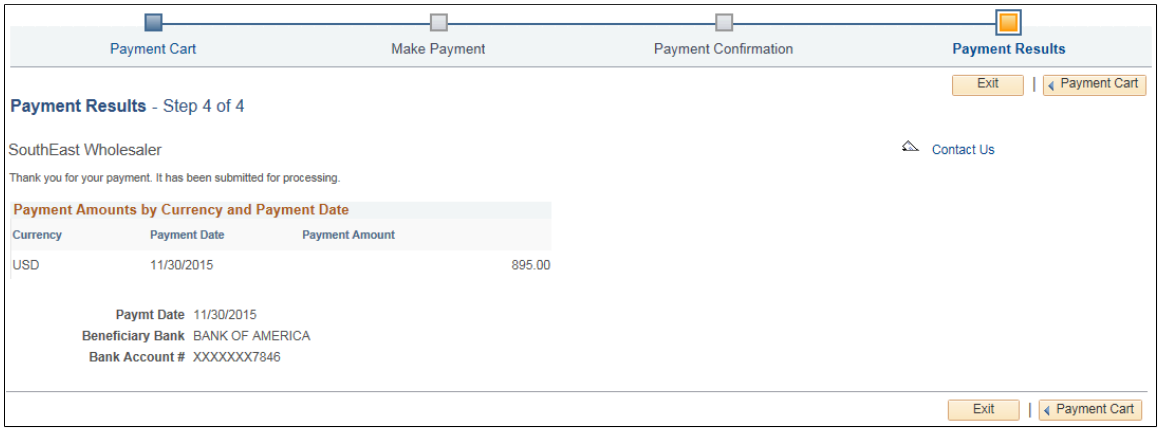
Direct Debit Information

The system displays bank details and account information when the payment method selected is *Direct Debit*.

Payment Results - Step 4 of 4

Use the Payment Results page (AR_EBP_PAY_CONF_DD) to confirm that the direct debit payment transaction was successful.

This example illustrates the fields and controls on the Payment Results - Step 4 of 4 for a direct debit payment.



Making Hosted Credit Card Payments (Classic)

This topic discusses paying invoices using a credit card in a Classic eBill Payment system using the hosted credit card model.

Pages Used to Make Hosted Credit Card Payments (Classic)

Page Name	*Definition Name*	*Usage*
Payment Cart - Step 1 of 4	AR_EBP_PAYCART_WZ1	Displays the contents of the payment cart and initiates the payment process. A horizontal navigation is provided for each step in the payment process.
Short Pay Reason Page	SH_PAY_RSN_TBL	Set up valid reason options that a customer can select when they elect to short pay. The options that you define here are available to customers on the Payment Cart page. See the “Short Pay Reason Page” (PeopleSoft Receivables) for more information.
Make Payment - Step 2 of 4	AR_EBP_PAYCARD_WZ2	Initiate the payment process.
Payment Amount Detail Page	AR_EBP_PITM_SEC	Review details about the invoices for the corresponding amount. See the Payment Amount Detail Pagefor more information.
Payment Confirmation: Enter Credit Card Info - Step 3 of 4	AR_EBP_PAY_CRCARD	Accept the default credit card, select another card, or add a new temporary profile before submitting payment.
Payment Results - Step 4 of 4	AR_EBP_PAY_CONF	Review payment results for credit card payment.
Credit Card Partial Payments Page	AR_EBP_PPCC_SEC	View a list of partial credit card payments for the invoice (available in both hosted and traditional credit card models). See Adding a Credit Card Profile for more information.

Understanding Hosted Credit Card Payments

You can make credit card payments in eBill Payment on systems using a hosted credit card implementation.

The Payment Cart displays the following steps for payments made using a credit card on systems using a hosted credit card implementation:

1. Payment Cart

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2. Make Payment
3. Payment Confirmation
4. Payment Results

The Payment Cart and Make Payment steps are the same for the *Credit Card* payment method in both hosted credit card and traditional credit card systems. However, if you are using the *Credit Card* payment method in a traditional credit card implementation, you see added information in the Payment Confirmation steps, and the Payment Results step is different.

Compare to the steps for paying by credit card in a traditional credit card system here: Making Traditional Credit Card Payments (Classic).

Note: When the system detects an error in any step, the subsequent steps are locked until the error is fixed.

Payment Cart - Step 1 of 4

Use the Payment Cart page (AR_EBP_PAYCART_WZ1) to display and select invoices for payment.

Navigation:

Click the **Add to Cart** button that is located on pages displaying invoices or click the **Payment Cart** link from the Menu.

This page is the same for credit card payments in both the hosted and traditional models. See Payment Cart - Step 1 of 4 for the traditional credit card model.

Field or Control	*Description*
Payment Method	Select *Credit Card* from the available options. The system uses the payment method that is defined on the My Preferences for eBill Payment page as the default value.

Invoices in the Cart

Customers can select the corresponding check box for the invoices they want to pay.

Field or Control	*Description*
Payment Date	The current system date is the default.

Field or Control	*Description*
Payment Amount	The system uses the value in the **Customer Balance** field as the default for this field. However, the customer can use the PeopleSoft eBill Payment Short Pay feature by overriding this value with an amount that is less than the customer balance. If Customers choose to short pay the invoice, they must select a short pay reason. You set up the short pay reasons on the Short Pay Reason page (SH_PAY_RSN_TBL). The system displays an error message and marks the payment line in error if a customer does not provide a short pay reason. **Note:** Invoices with negative amounts can be added to the payment cart, but the total Payment Amount cannot be negative. An error message appears if the total Payment Amount for a currency in the cart is negative.
Currency	The payments are grouped by currency.
	Click the **Partial Payment** icon to access the Credit Card Partial Payments page (AR_EBP_PPCC_SEC) to view the partial payments done by credit card for that specific invoice. This page is available in both hosted and traditional credit card models. See Making Traditional Credit Card Payments (Classic).
Invoice Attachments	Click to view or add supporting documentation as attachments.

Note: The fields **Invoice Balance** and **Payment Amount** reflect that a partial payment has been made. An invoice is removed from the Payment Cart only when the payment is fully paid.

Make Payment - Step 2 of 4

Use the Make Payment page (AR_EBP_PAYCARD_WZ2) to initiate the payment process.

Navigation:

Click the **Next** button on the Payment Cart page.

This page is the same for credit card payments in both the hosted and traditional models. See Make Payment - Step 2 of 4 in the traditional credit card model.

Field or Control	*Description*
Payment Method	Displays the **Payment Method** used.

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Field or Control	*Description*
Short Pay Comment	Enter or modify the text in this field when short paying an invoice. If customers short pay an invoice and enter nothing in this field, the system generates an error message when they attempt to go to the next step.
Payment Amount	Click the amount link in this column to access the Make Payment - Payment Amount Detail page (AR_EBP_PITM_SEC), where you can review details about the invoices for the corresponding amount.
Submit Payment	Click this button to submit a single payment. To cancel a payment while in the third-party site, click the Cancel button. If a Cancel button is not available on the third-party payment page, return to the PeopleSoft site using the top navigation.

Payment Amounts by Currency and Payment Date

Field or Control	*Description*
Currency	Displays payments grouped by currency.
Payment Date	Displays the payment date or the default date entered on the Payment Cart page.
Payment Amount	Click a payment amount link to navigate to the Payment Amount Detail page, where customers can review details about the invoices for the corresponding amount.

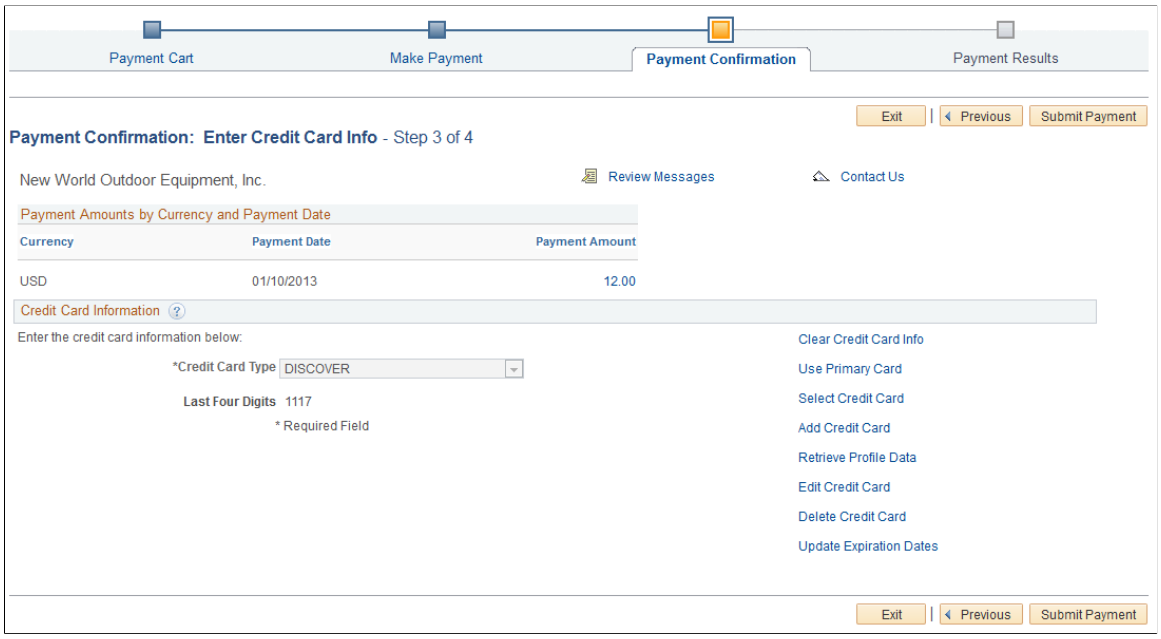
Payment Confirmation: Enter Credit Card Info - Step 3 of 4

Use the Payment Confirmation page (AR_EBP_PAY_CRCARD) to accept the default credit card, select another card, or add a new temporary profile before submitting payment.

Navigation:

Click the **Next** button on the Make Payment - Step 2 of 4 page.

This example illustrates the fields and controls on the Payment Confirmation: Enter Credit Card Info - Step 3 of 4 for a payment using a credit card in a hosted system.



The system uses the default credit card profile. If multiple profiles exist, you can change the profile by clicking the **Select Credit Card** link to access the Credit Card Selection page (AR_CC_SELECT_SS).

For more information about the **Credit Card Information** action links, see “Managing Credit Card Data Using Action Links” (PeopleSoft Order to Cash Common Information).

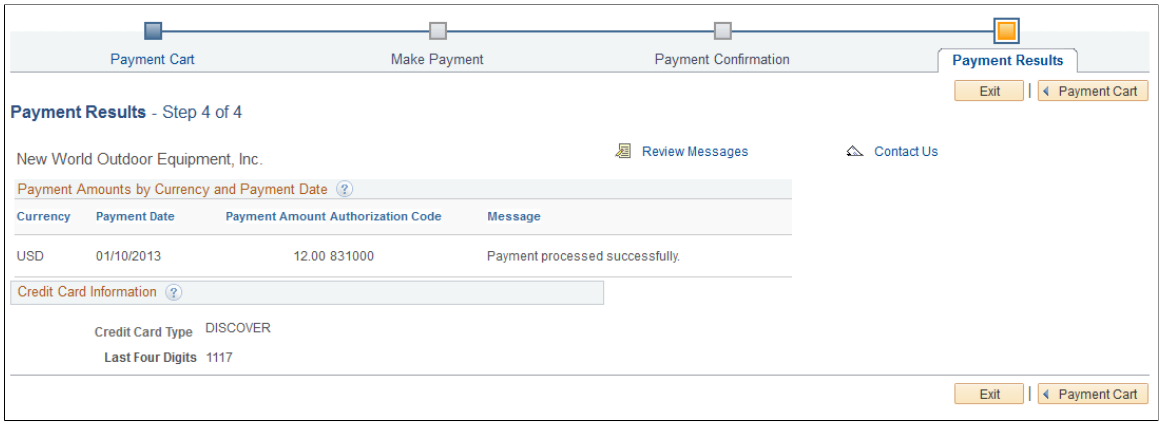
Payment Results - Step 4 of 4

Use the Payment Results page (AR_EBP_PAY_CONF) to review payment results for credit card payments.

Navigation:

Click the **Submit Payment** button on the Make Payment page.

This example illustrates the fields and controls on the Payment Results page - Step 4 of 4 for a payment using a credit card in a hosted system.



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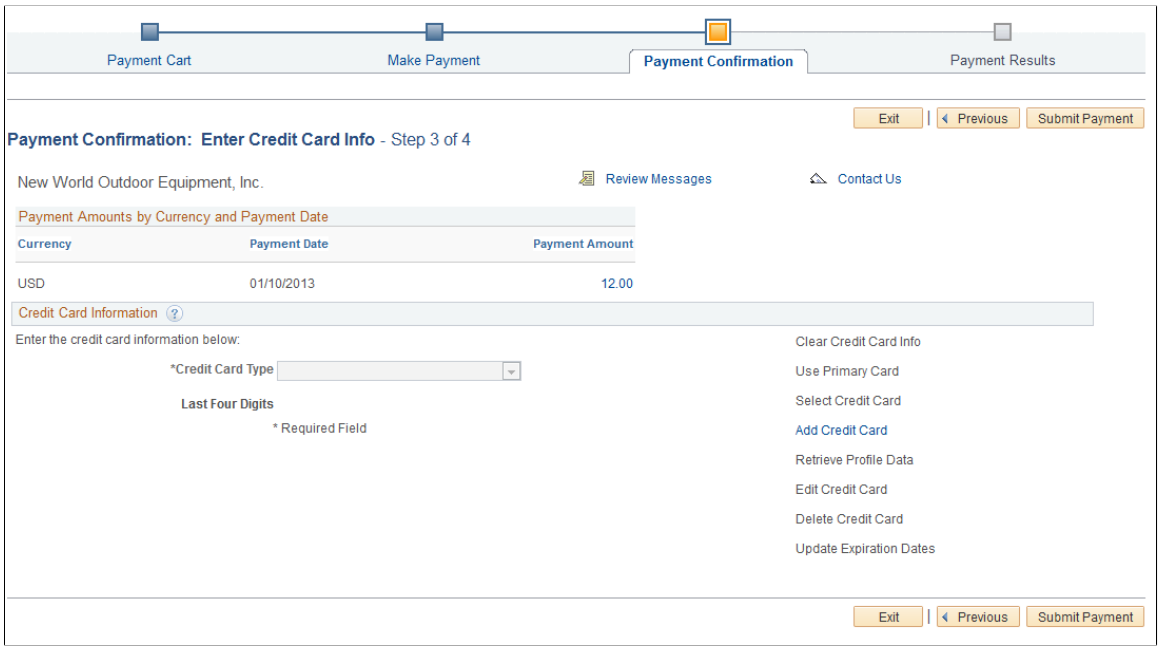
Important! Upon returning to the PeopleSoft application from the hosted credit card website, you must *always* click the **Save** button to save the payment data.

Adding a Credit Card Profile

You may need to add a credit card profile in a hosted credit card system that creates a temporary profile before submitting an online credit card transaction. In this case, you must add a credit card profile if none exists in order to complete payment. If the hosted credit card system is set up to create temporary profiles *after* online credit card transactions, the system creates the temporary profile after a successful credit card transaction.

For more information, see “Setting Up Credit Card Options and Groups” (Application Fundamentals).

This example illustrates the fields and controls on the Payment Confirmation page with no default credit card profile.



On the Payment Confirmation page, click the **Add Credit Card** link to transfer to the hosted credit card website to enter credit card information.

The hosted credit card website stores the complete credit card information for payments and sends profile data to the PeopleSoft system.

Important! You must click the **Save** button on the Payment Confirmation page to commit the profile information to the PeopleSoft system.

Related Links

“Managing Credit Card Data Using Action Links” (PeopleSoft Order to Cash Common Information)

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Making Electronic Check Payments (Classic)

This topic discusses how to pay invoices by electronic check using PeopleSoft Classic eBill Payment.

Pages Used to Make Electronic Check Payments (Classic)

Page Name	*Definition Name*	*Usage*
Payment Cart - Step 1 of 3	AR_EBP_PAYCART_WZ1	View the contents of the Payment Cart to begin the payment process. A horizontal navigation provides each step in the payment process.
Short Pay Reason Page	SH_PAY_RSN_TBL	Set up valid reason options that a customer can select when they elect to short pay. The options that you define here are available to customers on the Payment Cart page. See the “Short Pay Reason Page” (PeopleSoft Receivables) for more information.
ePay Partial Payments Page	AR_EBP_PPEP_SEC	View a list of partial electronic check payments for the invoice.
Make Payment - Step 2 of 3	AR_EBP_PAYCARD_WZ2	Initiate the payment process.
Payment Amount Detail Page	AR_EBP_PITM_SEC	Review details about the invoices for the corresponding amount. See Make Payment - Step 2 of 3 for more information.
Payment Results - Step 3 of 3	AR_EBP_PAY_RSLT_EP	Review payment results for electronic check payments.

Understanding Electronic Check Payments

The Electronic Check payment option requires ePayment integration with a third-party payment processor. See the product documentation for *PeopleSoft Integration Interfaces*.

You must also set up your Receivables system to support ePayments through the self-service component, eBill Payment. See “Setting Up Electronic Payment Options” (Application Fundamentals) and “Setting Up ePayment Profiles” (PeopleSoft Receivables).

The Payment Cart displays the following steps for payments using electronic checks:

1. Payment Cart

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2. Make Payment
3. Payment Results

After selecting the Electronic Check payment method, the user is transferred to the hosted payment supplier's site for payment completion.

Note: When the system detects an error in any step, the subsequent steps are locked until the error is fixed.

The electronic check payment option supports only USD payments and real-time transactions; you cannot make future or scheduled payments. The system displays an error message and marks the payment line in error if a customer enters a future payment date.

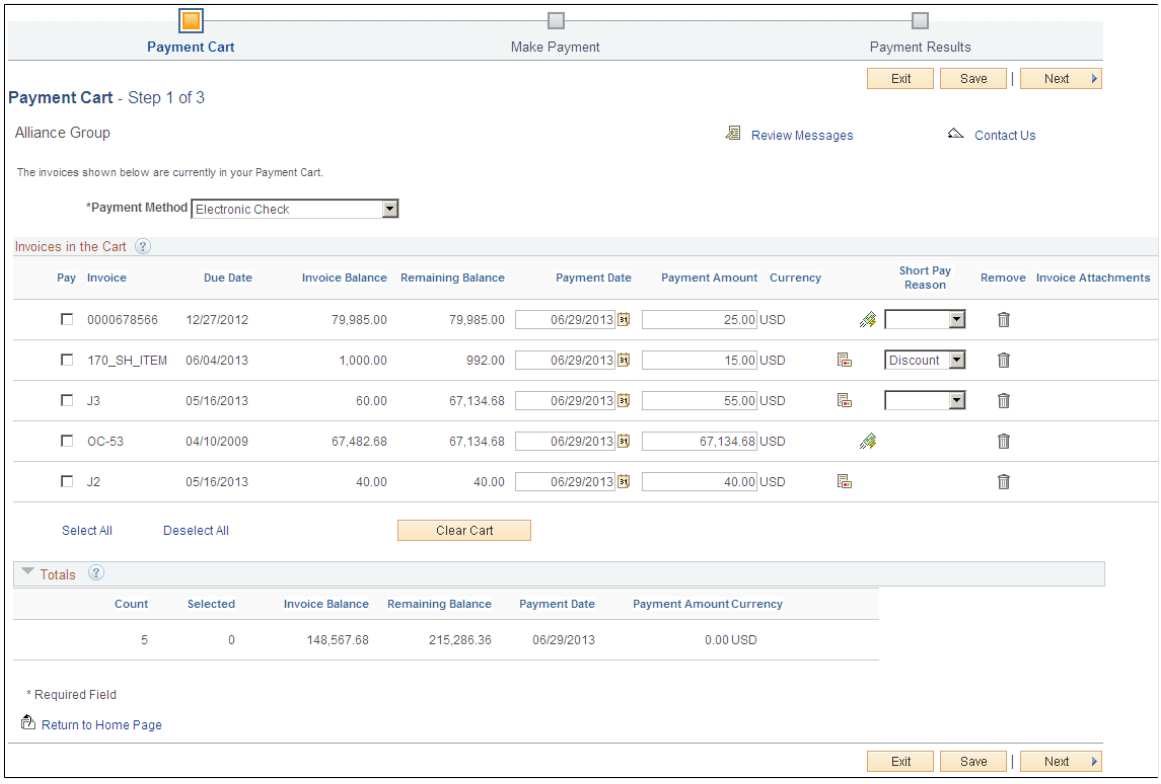
Payment Cart - Step 1 of 3

Use the Payment Cart page (AR_EBP_PAYCART_WZ1) to display and select invoices for payment.

Navigation:

Click the **Add to Cart** button that is located on pages displaying invoices or click the **Payment Cart** link from the Menu.

This example illustrates the fields and controls on the Payment Cart (Step 1 of 3) for an electronic check payment.



Field or Control	*Description*
Payment Method	Select *Electronic Check* from the available options. The system uses the payment method that is defined on the My Preferences for eBill Payment page as the default value.

Invoices in the Cart

Customers can select the corresponding check box for the invoices they want to pay.

Field or Control	*Description*
Payment Date	The current system date is the default. Electronic Check payment methods do not support scheduled payments. The system displays an error message and marks the payment line in error if a customer enters a future payment date.
Payment Amount	The system uses the value in the **Customer Balance** field as the default for this field. However, the customer can use the PeopleSoft eBill Payment Short Pay feature by overriding this value with an amount that is less than the customer balance. If Customers choose to short pay the invoice, they must select a short pay reason. You set up the short pay reasons on the Short Pay Reason page (SH_PAY_RSN_TBL). The system displays an error message and marks the payment line in error if a customer does not provide a short pay reason. **Note:** Invoices with negative amounts can be added to the payment cart, but the total Payment Amount cannot be negative. An error message appears if the total Payment Amount for a currency in the cart is negative.
Currency	The payments are grouped by currency.
	Click the **ePay Partial Payment** icon to open the ePay Partial Payments page (AR_EBP_PPEP_SEC), where you can view the partial payments done by electronic check for that specific invoice.
Invoice Attachments	Click to view or add supporting documentation as attachments.

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Note: The fields Invoice Balance and Payment Amount reflect that a partial payment has been made. An invoice is removed from the Payment Cart only when the payment is fully paid.

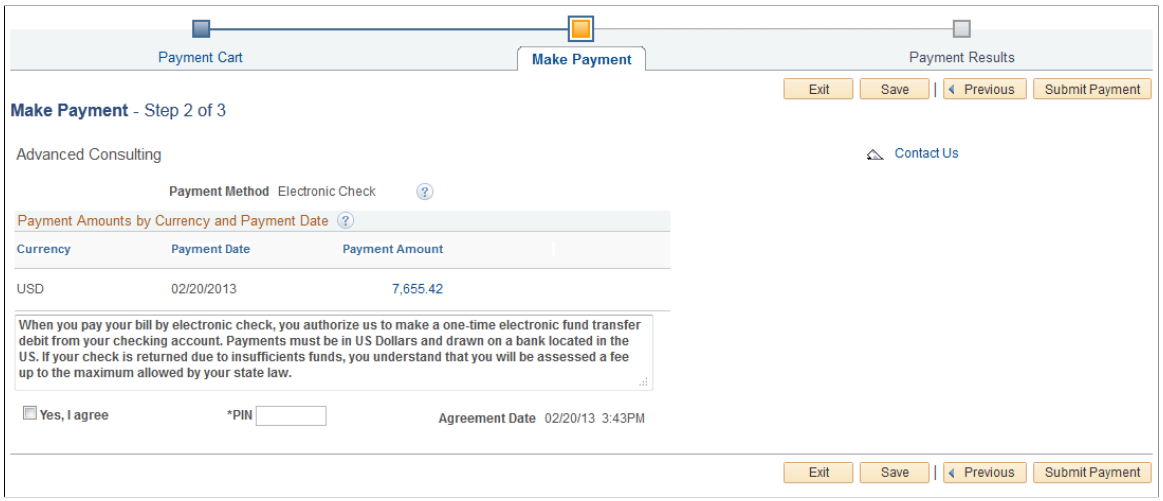
Make Payment - Step 2 of 3

Use the Make Payment page (AR_EBP_PAYCARD_WZ2) to initiate the payment process.

Navigation:

Click the **Next** button on the Payment Cart - Step 1 of 2 page.

This example illustrates the fields and controls on the Make Payment (Step 2 of 3) for an electronic check payment.



Field or Control	*Description*
Payment Method	Displays the **Payment Method** used, in this case *Electronic Check*.
Short Pay Comment	Enter or modify the text in this field when short paying an invoice. If customers short pay an invoice and enter nothing in this field, the system generates an error message when they attempt to go to the next step.
Payment Amount	Click the amount link in this column to access the Make Payment - Payment Amount Detail page (AR_EBP_PITM_SEC), where you can review details about the invoices for the corresponding amount.
Submit Payment	Click this button to submit a single payment and transfer to the third-party site where you enter check information. To cancel a payment while in the third-party site, click the Cancel button. If a **Cancel** button is not available on the third-party payment page, return to the PeopleSoft site using the top navigation.

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Payment Amounts by Currency and Payment Date

Field or Control	*Description*
Currency	Displays payments grouped by currency.
Payment Date	Displays the payment date or the default date entered on the Payment Cart page.
Payment Amount	Click a payment amount link to navigate to the Make Payment - Payment Amount Detail page, where customers can review details about the invoices for the corresponding amount.

Electronic Check Fields

Field or Control	*Description*
Terms and Conditions text	Displays the terms and conditions set up for the Electronic Check payment method on the “eBill – Electronic Payments Page” (Application Fundamentals).
Yes, I agree and **Agreement Date**	Click the check box to indicate agreement with the terms and conditions. The system records the date and time in the **Agreement Date** field.
PIN	Enter the personal identification number (PIN). PIN entry depends on electronic check setup on the Electronic Payment Options for Self Service page and a customer PIN on the Maintain Contacts page. The PIN field appears when the setup for PIN entry is *Mandatory*. The PIN value must match the customer PIN on the Maintain Contacts page to pay successfully by electronic check. When the setup for PIN entry is *Optional*, the system hides the **PIN** field. See also the “Contact Information - Maintain Contacts Page” (PeopleSoft Order to Cash Common Information).

See also “Setting Up Electronic Payment Options” (Application Fundamentals).

Payment Results - Step 3 of 3

Use the Payment Results page (AR_EBP_PAY_RSLT_EP) to review payment results for electronic check payments.

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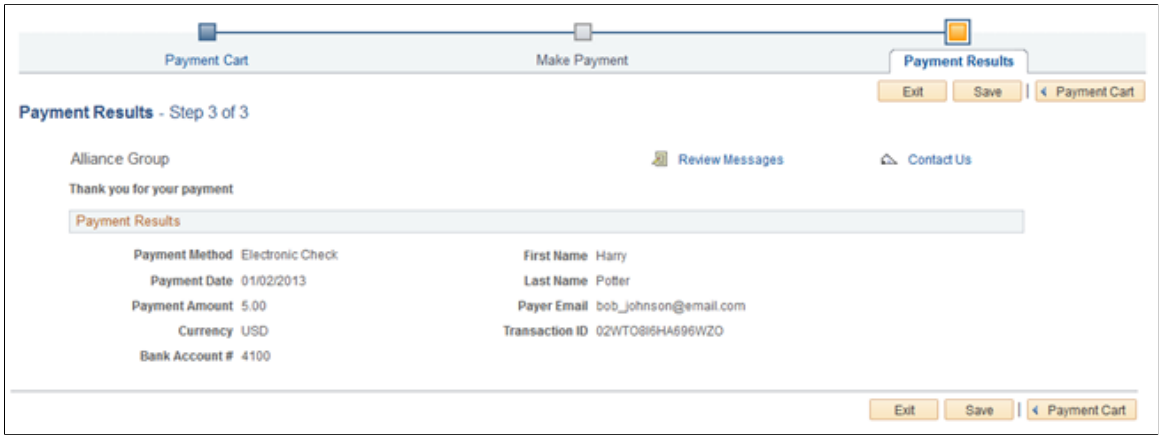
Navigation:

Click the **Submit Payment** button on the Make Payment - Step 2 of 3 page.

This example illustrates the fields and controls on the Payment Results page (Step 3 of 3) for an electronic check payment.



To complete the electronic check transaction, you must do one of the following on the Payment Results page:

- Click the **Save** button to record the electronic check charges.
- Click the **Payment Cart** button to record the transaction and return to the Payment Cart page.
- Click the **Exit** button to record the transaction and exit the Payment Cart.

Posting Partial Payments for Electronic Payments

Use the ePay Partial Payments page (AR_EBP_PPEP_SEC) to view a list of partial payments for the invoice.

Navigation:

Click the **Payment Cart** button on the Payment Results page to return to the Payment Cart page.

Click the **ePay Partial Payment** icon on Payment Cart invoice line.

This example illustrates the fields and controls on the ePay Partial Payments page.

Making PayPal Payments (Classic)

This topic discusses how to pay invoices using PayPal in PeopleSoft Classic eBill Payment. A horizontal navigation guides you through each step in the payment process.

Pages Used to Make PayPal Payments (Classic)

Page Name	*Definition Name*	*Usage*
Payment Cart - Step 1 of 4	AR_EBP_PAYCART_WZ1	View the contents of the Payment Cart and select invoices for payment to begin the payment process.
Short Pay Reason Page	SH_PAY_RSN_TBL	Set up valid reason options that a customer can select when they elect to short pay. The options that you define here are available to customers on the Payment Cart page. See the “Short Pay Reason Page” (PeopleSoft Receivables) for more information.
Make Payment - Step 2 of 4	AR_EBP_PAYCARD_WZ2	Initiate the payment process. Upon completing this page, the system transfers you to PayPal to authorize the payment.
Payment Amount Detail Page	AR_EBP_PITM_SEC	Review details about the invoices for the corresponding amount.
Payment Confirmation - Step 3 of 4	AR_EBP_PAY_VERF_PL	Finalize the payment, which has been authorized in PayPal.
Payment Results - Step 4 of 4	AR_EBP_PAY_RSLT_EP	Review and save payment results in the PeopleSoft system for PayPal payments.

Understanding PayPal Payments

PeopleSoft eBill Payment integrates with PayPal to enable payments through PayPal Express Checkout. Merchants must create or use an established PayPal business account for receiving payments. Their customers must also set up a PayPal account appropriate for their business use.

This diagram shows how a payment is processed using PayPal Express Checkout:

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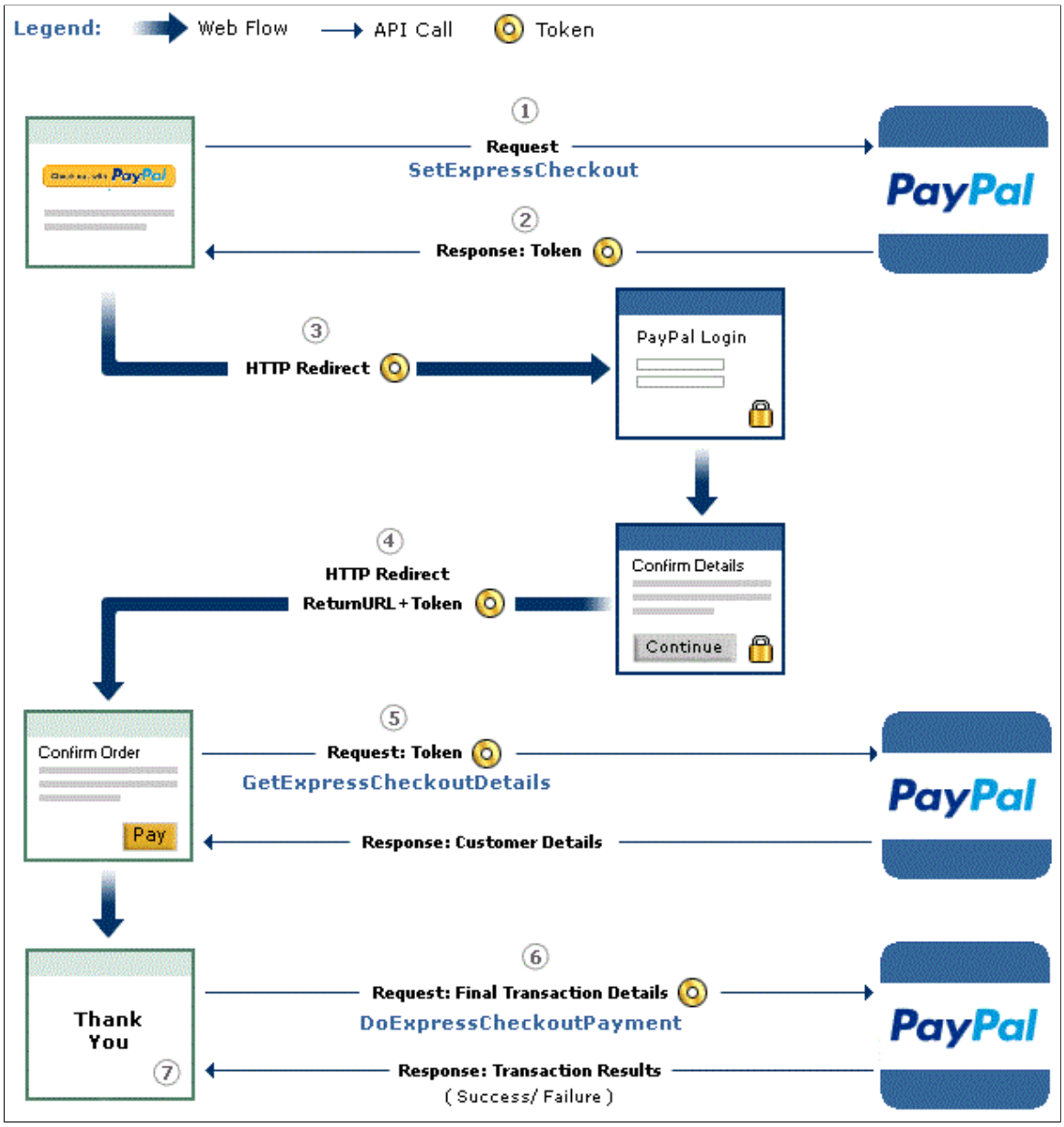
This diagram illustrates the process flow of the PayPal integration with eBill Payment, using PayPal Express Checkout. (Copyright 2016, PayPal. Used by permission.)



The Payment Cart displays the following steps for payments made through PayPal:

1. Payment Cart
2. Make Payment
3. Payment Confirmation
4. Payment Results

The PayPal payment option supports only USD and real-time payments; you cannot make future or scheduled payments.

Prerequisites

The PayPal payment option requires ePayment integration in PeopleSoft with a third-party payment processor, which you set up using Enterprise Components. See the product documentation for *PeopleSoft Integration Interfaces*.

You must also set up your PeopleSoft Receivables system to support ePayments through the self-service component, eBill Payment. See “Setting Up Electronic Payment Options” (Application Fundamentals) and “Setting Up ePayment Profiles” (PeopleSoft Receivables).

Paying Invoices Using PayPal in eBill Payment

The steps for paying an invoice in PeopleSoft eBill Payment using the PayPal payment method are:

1. Select invoices and enter payment information in the Payment Cart - Step 1 of 4.
2. Review the PayPal payment amount on the Make Payment - Step 2 of 4 page. You must enter short pay comments for any short pay transactions.
3. When you click **Next** on the Make Payment - Step 2 of 4 page, the PayPal log in page appears. Log in to your PayPal account.

   Or click the link to **Cancel and return to PeopleSoft** to exit PayPal without saving and return to your Payment Cart.
4. Click the **Continue** button on the PayPal payment page to authorize the payment. The system returns to PeopleSoft.
5. On the Payment Confirmation - Step 3 of 4 page in PeopleSoft, click the **Complete Payment** button to finalize the transaction.
6. Save your payment on the Payment Results - Step 4 of 4 page.

Note: When the system detects an error in any step, the subsequent steps are locked until the error is fixed.

Payment Cart - Step 1 of 4

Use the Payment Cart page (AR_EBP_PAYCART_WZ1) to display and select invoices for payment to begin the payment process.

Navigation:

Click the **Add to Cart** button that is located on pages displaying invoices or click the **Payment Cart** link from the Menu.

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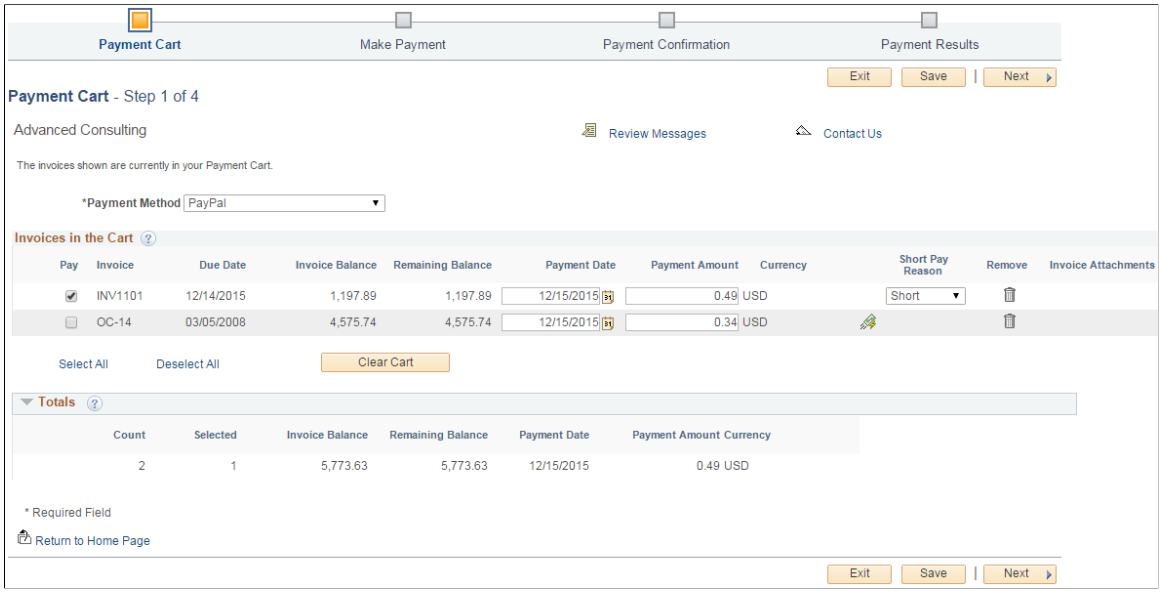
This example illustrates the fields and controls on the Payment Cart (Step 1 of 4) for a PayPal payment.



Field or Control	*Description*
Payment Method	Select *PayPal* from the available options. The system uses the payment method that is defined on the My Preferences for eBill Payment page as the default value.

Invoices in the Cart

Select the corresponding **Pay** check box for the invoices you want to pay.

Field or Control	*Description*
Payment Date	Enter the desired payment date. The current system date is the default. PayPal payments are real-time and do not support scheduled payments. The system displays an error message and marks the payment line in error if a customer enters a future payment date.

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Field or Control	*Description*
Payment Amount	Enter the desired payment amount. The system uses the value in the **Customer Balance** field as the default for this field. However, the customer can use the PeopleSoft eBill Payment Short Pay feature by overriding this value with an amount that is less than the invoice balance. If you choose to short pay the invoice, you must select a short pay reason. Set up short pay reasons on the Short Pay Reason page (SH_PAY_RSN_TBL). The system displays an error message and marks the payment line in error if a customer does not provide a short pay reason. **Note:** Invoices with negative amounts can be added to the Payment Cart, but the total payment amount must be positive. An error message appears if the total payment amount for a currency in the cart is negative.
Currency	Displays the currency. The payments are grouped by currency.
	Click the **ePay Partial Payment** icon to open the ePay Partial Payments page (AR_EBP_PPEP_SEC), where you can review the partial payments for that specific invoice.

Note: The fields **Invoice Balance** and **Payment Amount** reflect that a partial payment has been made. An invoice is removed from the Payment Cart only when the payment is fully paid.

Make Payment - Step 2 of 4

Use the Make Payment page (AR_EBP_PAYCARD_WZ2) to initiate the payment process.

Upon completing this page, the system transfers you to PayPal to authorize the payment.

Navigation:

Click the **Next** button on the Payment Cart - Step 1 of 4 page.

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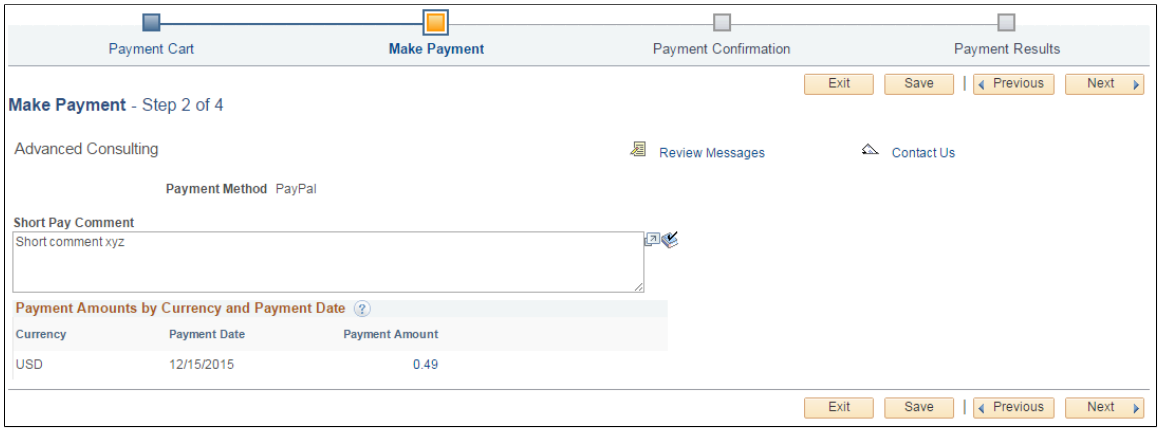
This example illustrates the fields and controls on the Make Payment (Step 2 of 4) for a PayPal payment.



Field or Control	*Description*
Payment Method	Displays the **Payment Method** used, in this case *PayPal*.
Short Pay Comment	Enter or modify the text in this field when short paying an invoice. If customers short pay an invoice and enter nothing in this field, the system generates an error message when they attempt to go to the next step.
Payment Amount	Click the amount link in this column to access the Make Payment - Payment Amount Detail page (AR_EBP_PITM_SEC), where you can review details about the invoices for the corresponding amount.
Next	Click this button to submit a payment. When you submit a PayPal payment, the PeopleSoft system transfers you to the PayPal login page for PayPal Express Checkout. To cancel the payment while in PayPal, click the **Cancel and return to PeopleSoft** link to exit PayPal and return to your Payment Cart.

Note: Click the **Next** button to submit the payment. When you submit a PayPal payment, the PeopleSoft system transfers you to PayPal to authorize the transaction.

Payment Amounts by Currency and Payment Date

Field or Control	*Description*
Currency	Displays payments grouped by currency.
Payment Date	Displays the payment date or the default date entered on the Payment Cart page.

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Field or Control	*Description*
Payment Amount	Click a payment amount link to navigate to the Payment Amount Detail page (AR_EBP_PITM_SEC), where customers can review details about the invoices for the corresponding amount.

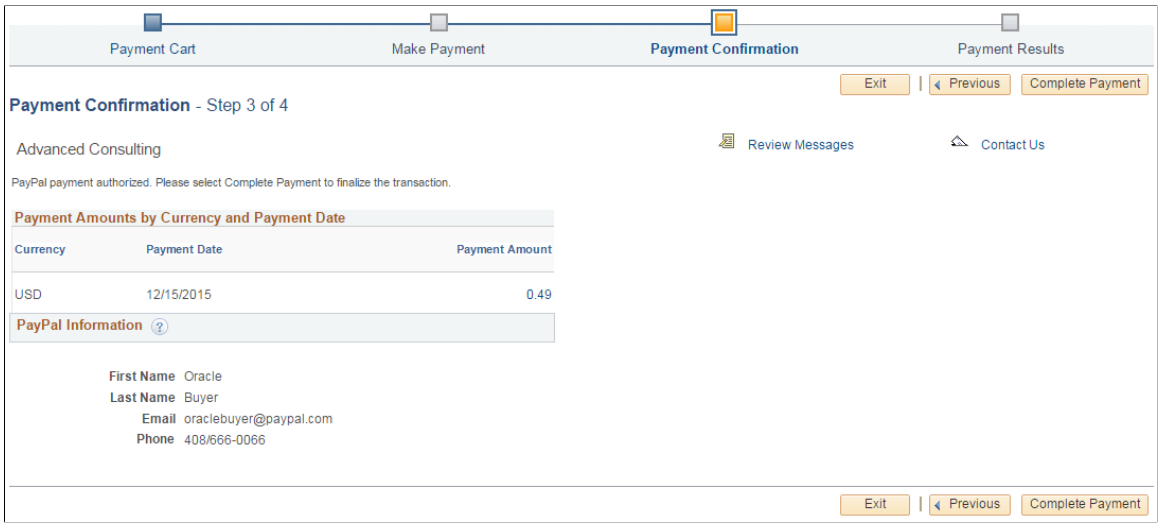
Payment Confirmation - Step 3 of 4

Use the Payment Confirmation (AR_EBP_PAY_VERF_PL) page to finalize the payment, which has been authorized in PayPal.

Navigation:

Click the **Continue** button in PayPal.

This example illustrates the fields and controls on the Payment Confirmation (Step 3 of 4) for a PayPal payment.



PayPal returns the following information into the PeopleSoft system:

- Currency, payment date, and payment amount.
- Customer's name and contact information as set up in the PayPal system.

After reviewing the amount and PayPal information, proceed by clicking one of the following buttons:

Field or Control	*Description*
Exit	Click to exit the transaction. If you click the **Exit** button, or do not click **Complete Payment**, the transaction is considered incomplete and is not processed.

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Field or Control	*Description*
Previous	Click to return to the Make Payment step. Because the PayPal authorization has a time limit, you may need to reauthorize the payment in your PayPal account and click the **Confirm Payment** button on the Make Payment page.
Complete Payment	Click to finalize and settle the PayPal payment.

Important! You must click the **Complete Payment** button to finalize and settle the PayPal payment, otherwise the transaction is incomplete.

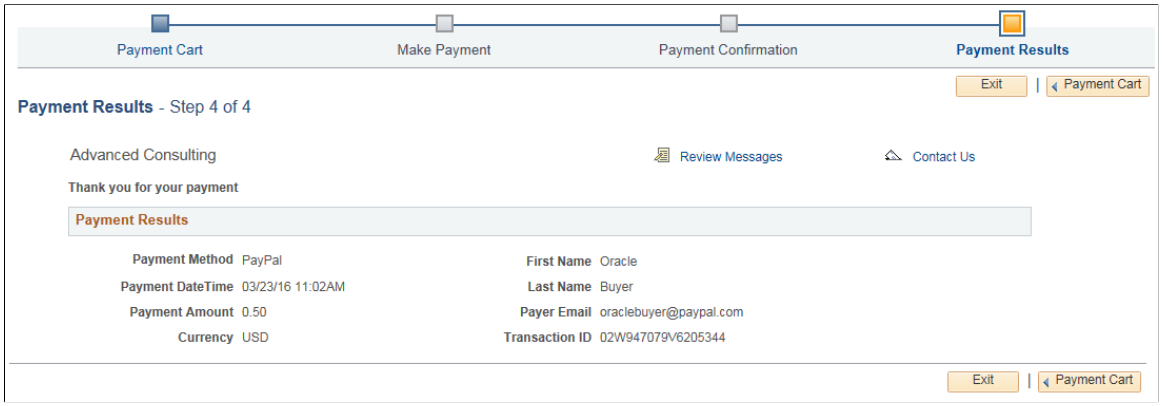
Payment Results - Step 4 of 4

Use the Payment Results (AR_EBP_PAY_RSLT_EP) page to review and save payment results in the PeopleSoft system for PayPal payments.

Navigation:

Click the **Complete Payment** button on the Payment Confirmation - Step 3 of 4 page.

This example illustrates the fields and controls on the Payment Results (Step 4 of 4) for a PayPal payment.



To complete the PayPal transaction, you must do one of the following on the Payment Results page in PeopleSoft:

Field or Control	*Description*
Exit	Click the button to exit the Payment Cart. This action records the transaction in PeopleSoft Receivables.
Payment Cart	Click the button to return to the Payment Cart train stop. This action records the transaction in PeopleSoft Receivables.

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Warning! You may lose the payment data if you do not record the PayPal payment in PeopleSoft. To record the data, you must click one of the following buttons on the Payment Results page: **Payment Cart** or **Exit**.

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Chapter 5

Using PeopleSoft Classic eBill Payment Pagelets

Understanding PeopleSoft eBill Payment Pagelets

PeopleSoft eBill Payment provides portal pagelets for corporate intranet or extranet home pages. These pagelets provide access to key data and transactions within PeopleSoft eBill Payment for use in customer portal registries.

You can personalize the portal home page by adding the pagelets that users need. Standard PeopleSoft role-based security ensures that users can access only the pagelets appropriate to their roles.

You can configure the portal home page with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. When you see two object names for a pagelet, the first one refers to the narrow version.

Some pagelets support personalization; the **Personalize** button in the pagelet title bar alerts you to this capability. Click the button to access the personalization page.

You can also design your own pagelets when your installation includes PeopleSoft Applications Portal.

Pagelet Security

Similar to page access, you control pagelet security at the component level by associating it with a permission list (which is then associated with a role); each pagelet has its own component to enable more granular access. (You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to the page's system, or object name.)

PeopleSoft groups pagelets into functional roles as an example of how to organize access. You must create the proper permission lists and associate them with actual role definitions before users can access them, or use the permission list definitions that PeopleSoft provides its delivered sample data. PeopleSoft delivers sample data security objects (roles and permission lists) that you can use as an example of how to set up pagelet access.

Sample Pagelet Organization

Role groupings provide examples of how to organize pagelet access by function.

PeopleSoft eBill Payment organizes pagelets by these sample roles:

- Broker
- Customer
- Customer service representative

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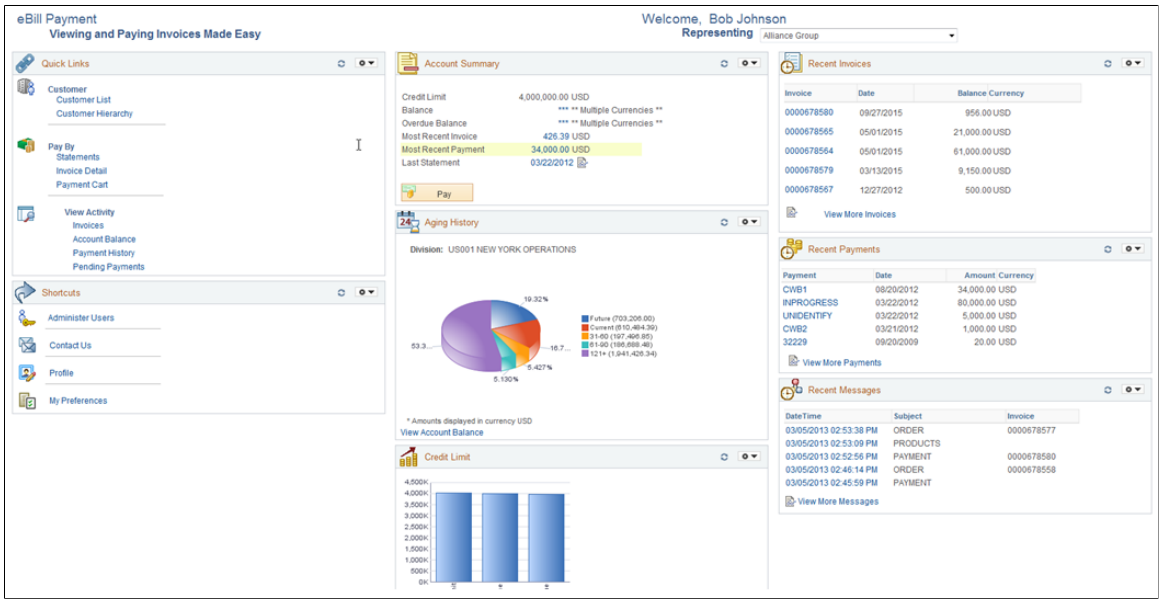
- Customer service manager
- Salesperson

Viewing PeopleSoft eBill Payment Pagelets

This topic lists the PeopleSoft eBill Payment pagelets that your customers can use to view billing and account information. You can customize your landing page with any or all of the pagelets, which are delivered as system data in eBill Payment.

To configure your landing page, click the **Personalize Content** link under the banner on the home page to open the Personalize Content page. Select the items you want to appear on your home page. To arrange layout, click the **Personalize Layout** link.

This example illustrates the fields and controls on the eBill Payment landing page.



Pagelets Used to View Billing and Account Information

This table lists the PeopleSoft eBill Payment pagelets that you can use to review the billing and account information to which your role or user ID has access or permission.

Pagelet Name	*Usage*	*For More Information*
Account Summary	Review the amounts of the balance, overdue balance, most recent invoice, and most recent payment and the date of the last statement. For more details, click the value links for each field. Click the **Pay** button to view the Balance Detail page, where you can select invoices to add to the Payment Cart.	See Viewing Balance Details (Classic).

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Pagelet Name	*Usage*	*For More Information*
Aging History	Review aging history in a graphical representation, such as a pie chart or graph. Click the **View Account Balance** link to access the Account Balance page (AR_SUMBAL_SS).	See “Generating Aging Reports” (PeopleSoft Receivables).
Credit Limit	Review credit limit information.	See “Adding General Customer Information” (PeopleSoft Order to Cash Common Information).
Recent Invoices	Review the invoice number, balance, and currency of the most recently generated invoices. For more details about a specific invoice, click the invoice number link. Click **View More Invoices** to access the Invoice page (BI_BILL_LIST_SS), where you can review details of the most recent invoices.	See the product documentation for *PeopleSoft Billing*.
Recent Messages	Review recent messages by datetime, subject, and invoice number. For more details about a specific message, click the datetime link. Click the **View More Messages** link to access the Review Messages page (AR_CONVR_LIST_SS).	See “Entering and Reviewing Conversations” (PeopleSoft Receivables).
Recent Payments	Review the most recent payments by payment ID, date, amount, and currency. For more details about a specific payment, click the payment ID link. Click the **View More Payments** link to access the Payment History page (AR_SSREV_PAYMENTS).	See Viewing Payment Information (Classic).

You can also add a Shortcuts pagelet and a Quicklinks pagelet.

Account Summary Pagelet

Use the Account Summary pagelet to review the amounts of the balance, overdue balance, most recent invoice, and most recent payment, and the date of the last statement. For more details, click the value links for each field.

Click the **Pay** button to view the Balance Detail page, where you can select invoices to add to the Payment Cart.

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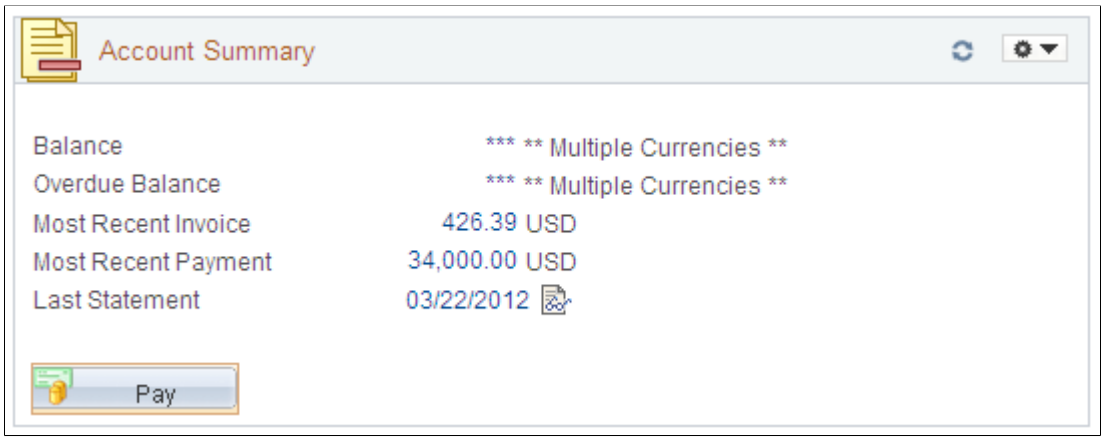
This example illustrates the fields and controls on the Account Summary pagelet.

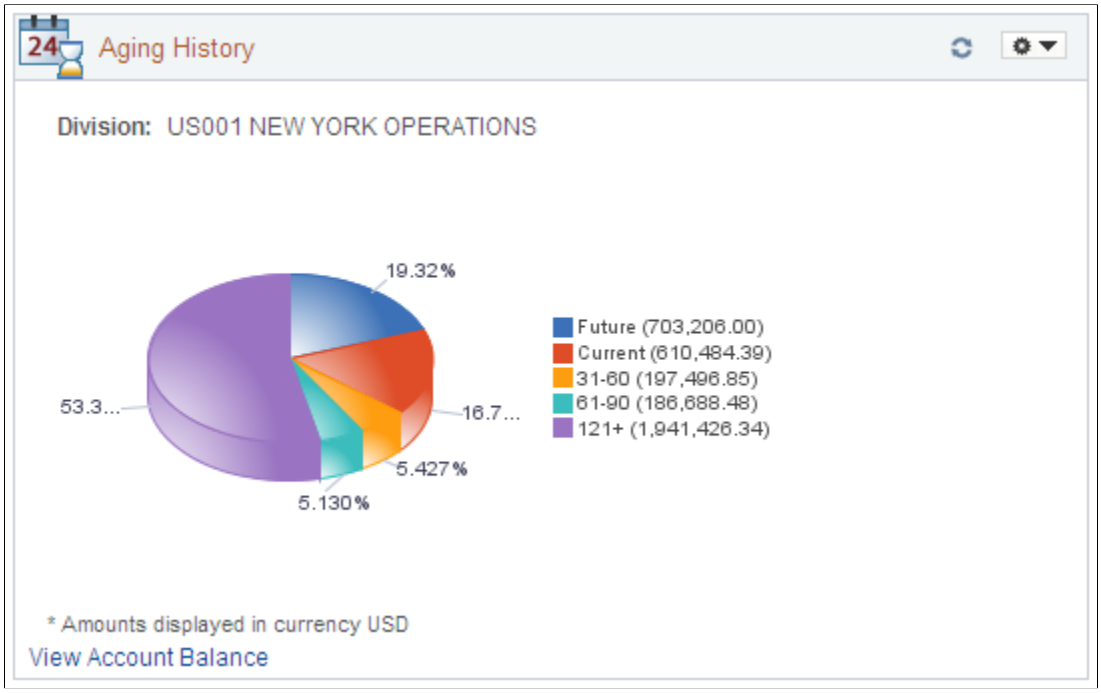


Aging History Pagelet

Use the Aging History pagelet to review aging history in a graphical representation, such as a pie chart or graph.

Click the **View Account Balance** link to access the Account Balance page (AR_SUMBAL_SS)

This example illustrates the fields and controls on the Aging History pagelet.



Recent Invoices Pagelet

Use the Recent Invoices pagelet to review the invoice number, balance, and currency of the most recently generated invoices. For more details about a specific invoice, click the invoice number link.

Click **View More Invoices** to access the Invoice page (BI_BILL_LIST_SS), where you can review details of the most recent invoices.

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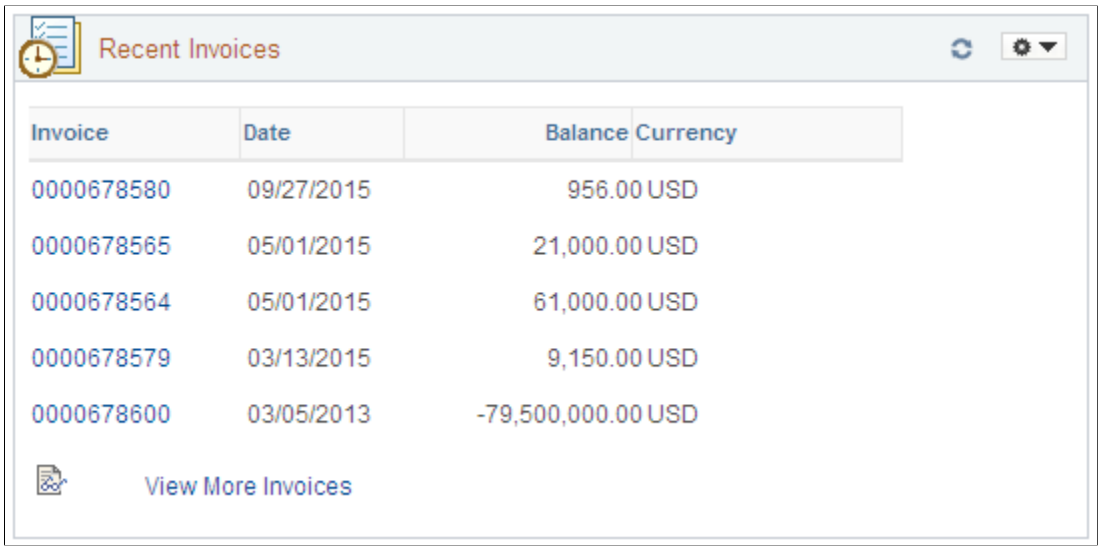
This example illustrates the fields and controls on the Recent Invoices pagelet.



Invoice	Date	Balance	Currency
0000678580	09/27/2015	956.00	USD
0000678565	05/01/2015	21,000.00	USD
0000678564	05/01/2015	61,000.00	USD
0000678579	03/13/2015	9,150.00	USD
0000678600	03/05/2013	-79,500,000.00	USD

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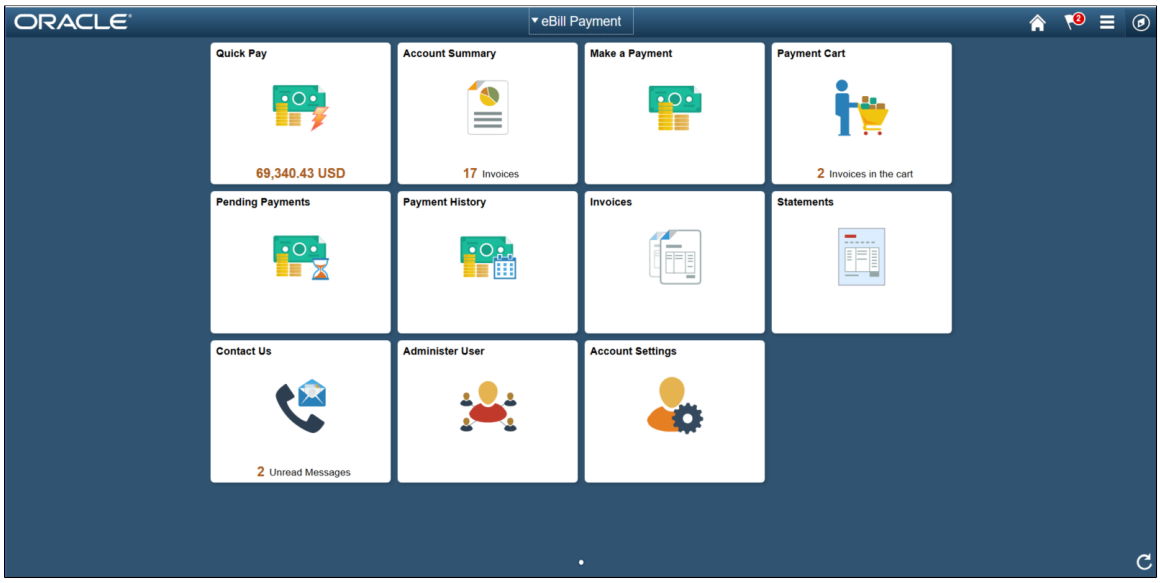
Chapter 6

Working with PeopleSoft Fluid eBill Payment

Accessing PeopleSoft Fluid eBill Payment Transactions

When you access the PeopleSoft customer portal, the system displays the Fluid eBill Payment navigation page, also known as the homepage. From the homepage, you can access PeopleSoft Fluid eBill Payment transactions that a biller has made available to you, whether you are a customer or a broker for multiple customers. PeopleSoft Fluid eBill Payment is available in large form factor (LFF) and small form factor (SFF) designs.

This example illustrates the fields and controls on the PeopleSoft Fluid eBill Payment Homepage as displayed on a laptop (LFF).



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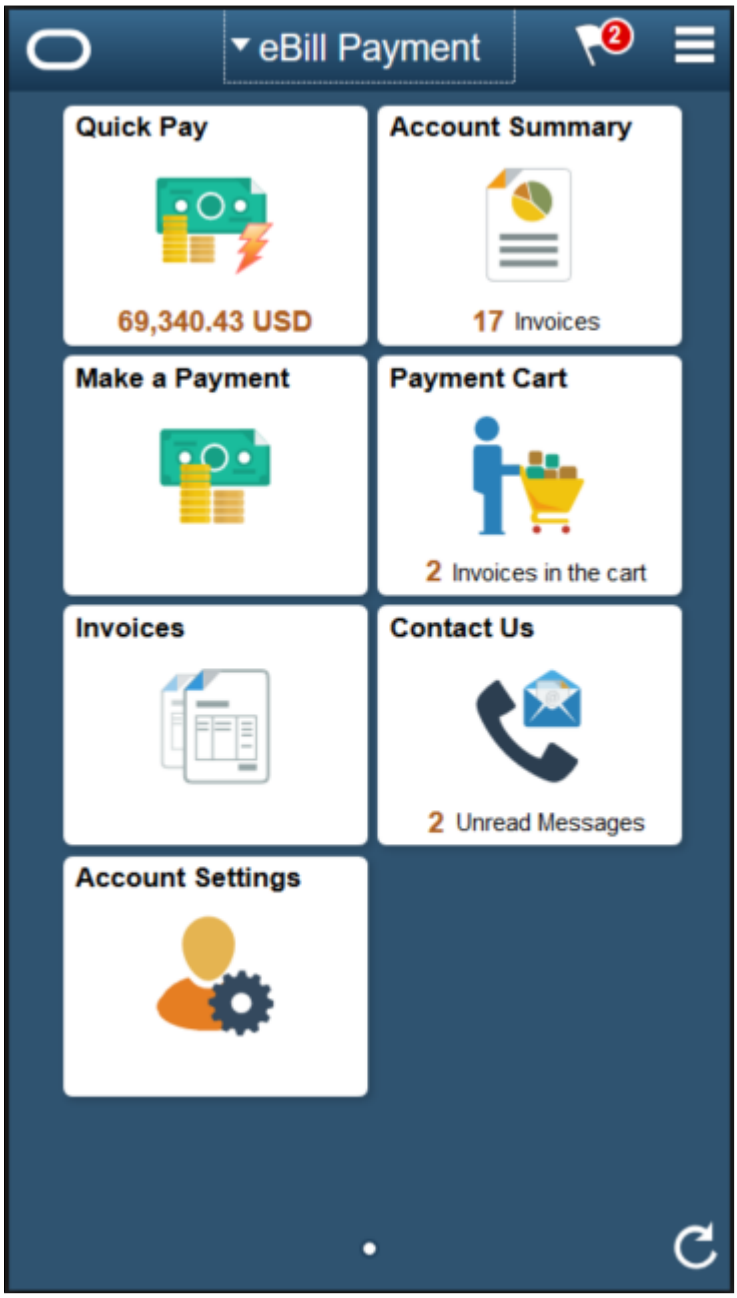
This example illustrates the fields and controls on the PeopleSoft Fluid eBill Payment as displayed on a smartphone (SFF).



Using the PeopleSoft Fluid eBill Payment Homepage

Depending on your role — as customer, broker, or administrator — and the device you are using, you can use these tiles on the PeopleSoft Fluid eBill Payment homepage.

The large form factor design (LFF) is used by devices such as laptops and desktops. The small form factor design (SFF) is used by devices such as tablets and smartphones.

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Tiles	*Form Factor Design*	*Usage*
Account Settings	LFF, SFF	Set up or modify account settings including billing addresses, contact numbers, and credit card profiles on file. See Setting Up Payment Accounts (Fluid).
Account Summary	LFF, SFF	Review account balance, recent invoices and payments, and aging and credit information. See Reviewing Account Summary Information (Fluid).
Administer User	LFF	This tile is for PeopleSoft Fluid eBill Payment administrators with appropriate permissions. Administrators can add or modify/update user profiles. See Managing Users in Fluid eBill Payment.
Contact Us	LFF, SFF	Direct access to the Message Center gives brokers or users the ability to communicate with the biller within the framework of a mailbox inside Fluid eBill Payment. See Using the Message Center.
Invoices	LFF, SFF	Review a list of invoices. See Reviewing Invoices (Fluid).
Make a Payment	LFF, SFF	Pay by total balance, past due balance, selected invoices, or most recent statement. See Making a Payment (Fluid).
Payment Cart	LFF, SFF	Pay for invoices in the cart in full or make partial payments, change payment date, review payment details, and submit payment. Payment steps and fields change dynamically depending on the selected payment method. See Using the Payment Cart in Fluid eBill Payment.

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Tiles	*Form Factor Design*	*Usage*
Payment History	LFF	Review payments made through Fluid eBill Payment and posted in Receivables. See Reviewing Payment History (Fluid).
Pending Payments	LFF	Review invoices submitted for payment in Fluid eBill Payment. The system removes the payment from the Pending Payments page upon posting in Receivables. See Reviewing Pending Payments (Fluid).
Quick Pay	LFF, SFF	Pay the balance for one currency using a single page, bypassing the Payment Cart entirely. See Using Quick Pay.
Statements	LFF	View a list of statements and open a printable statement image in a browser. Viewing Statements (Fluid).

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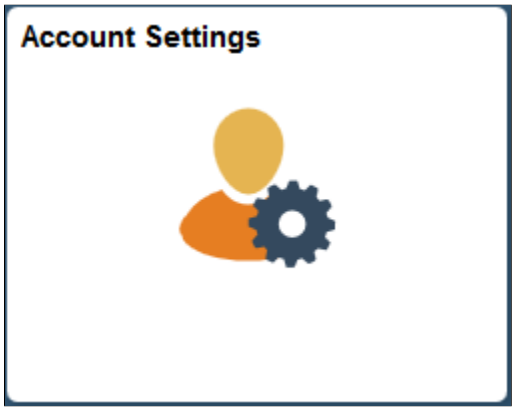
Chapter 7

Setting Up User Options and Accounts in Fluid eBill Payment

Setting Up Payment Accounts (Fluid)

This topic discusses the payment account information you can set up in Fluid eBill Payment when you select the Account Settings tile.

This example illustrates the fields and controls on the Account Settings Tile.



The Account Settings pages in the large form factor (LFF) and small form factor (SFF) designs display the same information, including the following:

- Billing addresses.
- Contact information, such as phone numbers.
- Credit card profiles on file.

Pages Used to Set Up Payment Accounts (Fluid)

Page Name	***Definition Name***	***Usage***
Pages in the Large Form Factor Design		
Account Settings - Contact Information Page (LFF)	EB_ACCTG_DET_FL	View contact information and manage phone information for the customer.

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Page Name	***Definition Name***	***Usage***
Add a Phone Number Page Edit Phone Number Page	EB_ACDET_CNT_SCF	Add and edit phone numbers.
Account Settings - Billing Address Page (LFF)	EB_ACCTG_DET_FL	Manage a customer's billing addresses.
Add a Billing Address Page Edit Billing Address Page	EB_ACDET_ADDR_SCF	Add and edit billing addresses.
Account Settings - Credit Cards Page (LFF)	EB_ACCTG_DET_FL	Manage a customer's credit card profiles. Access third-party credit card hosting site to add and edit credit card information.
Pages in the Small Form Factor Design		
Account Settings Page	EB_SACCTG_DET_FL	View contact information and access billing, phone, and credit card profile information.
Account Settings - Billing Address Page (SFF) Add a Billing Address Page Edit Billing Address Page	EB_SACCTG_ADD_SCF	Manage a customer's billing addresses. Add and edit billing addresses.
Account Settings - Phone Numbers Page (SFF) Add a Phone Number Page Edit Phone Number Page	EB_SACCTG_PHN_SCF	Manage a customer's phone numbers. Add and edit phone numbers.
Account Settings - Credit Cards Page (SFF)	EB_SACCTG_CRD_SCF	Manage a customer's credit card profiles. Access third-party credit card hosting site to add and edit credit card information.

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Common Elements Used to Set Up Payment Accounts

Field or Control	*Description*
	Select the Add button to add a credit card profile, billing address, or phone number on an Account Settings page.
Delete	Click the **Delete** button on the Edit Phone Number page or Edit Billing Address page to remove the entry.

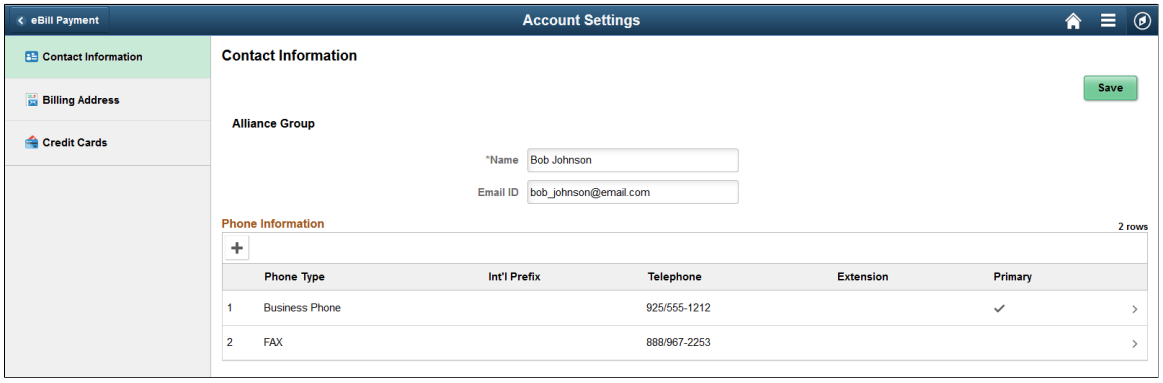
Account Settings - Contact Information Page (LFF)

Use the Account Settings - Contact Information page (LFF) to view contact information and manage phone information for the customer.

Navigation:

Select the Account Settings tile on My Homepage. Select the Contact Information button in the left panel.

This example illustrates the fields and controls on the Account Settings - Contact Information page (LFF). You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Name and **Email ID**	Displays available customer contact name and email address.
Phone Information	In the Phone Information grid, you can do the following: • View fields in the grid including the type of phone number, international prefix, number, and extension. • Add a new phone type row by selecting the **Add** button. • Select a phone type row to open the Edit Phone Number page, where you can edit or delete stored information.

Field or Control	*Description*
Primary	Displays a check mark in the **Primary** column if the number is designated as the preferred contact number.

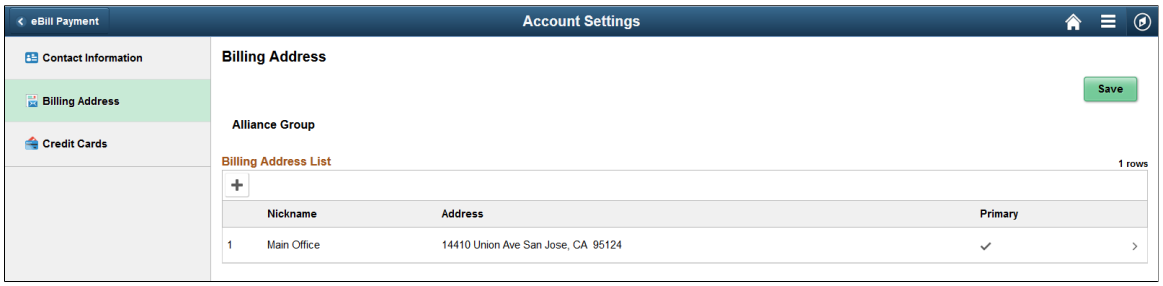
Account Settings - Billing Address Page (LFF)

Use the Account Settings - Billing Address page (LFF) to manage a customer's billing address.

Navigation:

Select the Account Settings tile on My Homepage. Select the **Billing Address** button in the left panel.

This example illustrates the fields and controls on the Account Settings - Billing Address page (LFF). You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Billing Address List	In the Billing Address List grid, you can do the following: • View fields in the grid including the address and a nickname for the address. • Add a new billing address row by selecting the **Add** button. • Select an address row to open the Edit Billing Address page, where you can edit or delete stored information. You cannot change a nickname once an address is saved.
Primary	Displays a check mark in the **Primary** column if the address is designated as the preferred billing address.

Account Settings - Credit Cards Page (LFF)

Use the Account Settings - Credit Cards page (LFF) to manage a customer's credit card profiles.

Access third-party credit card hosting site to add and edit credit card information.

Navigation:

Select the Account Settings tile on My Homepage. Select the **Credit Cards** button in the left panel.

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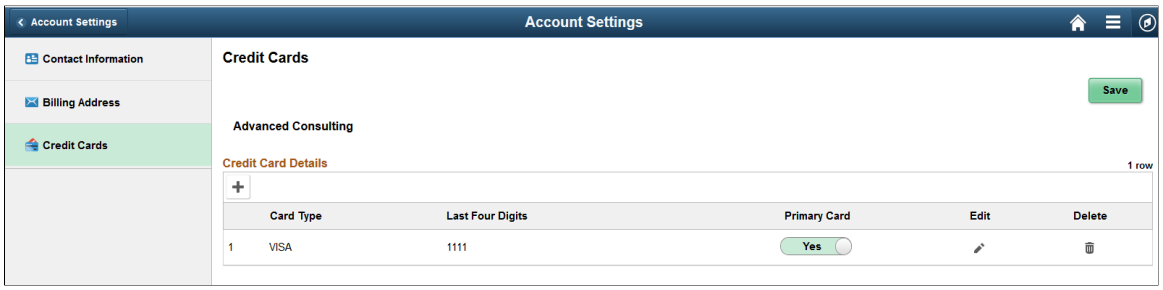
This example illustrates the fields and controls on the Account Settings - Credit Cards page (LFF). You can find definitions for the fields and controls later on this page.



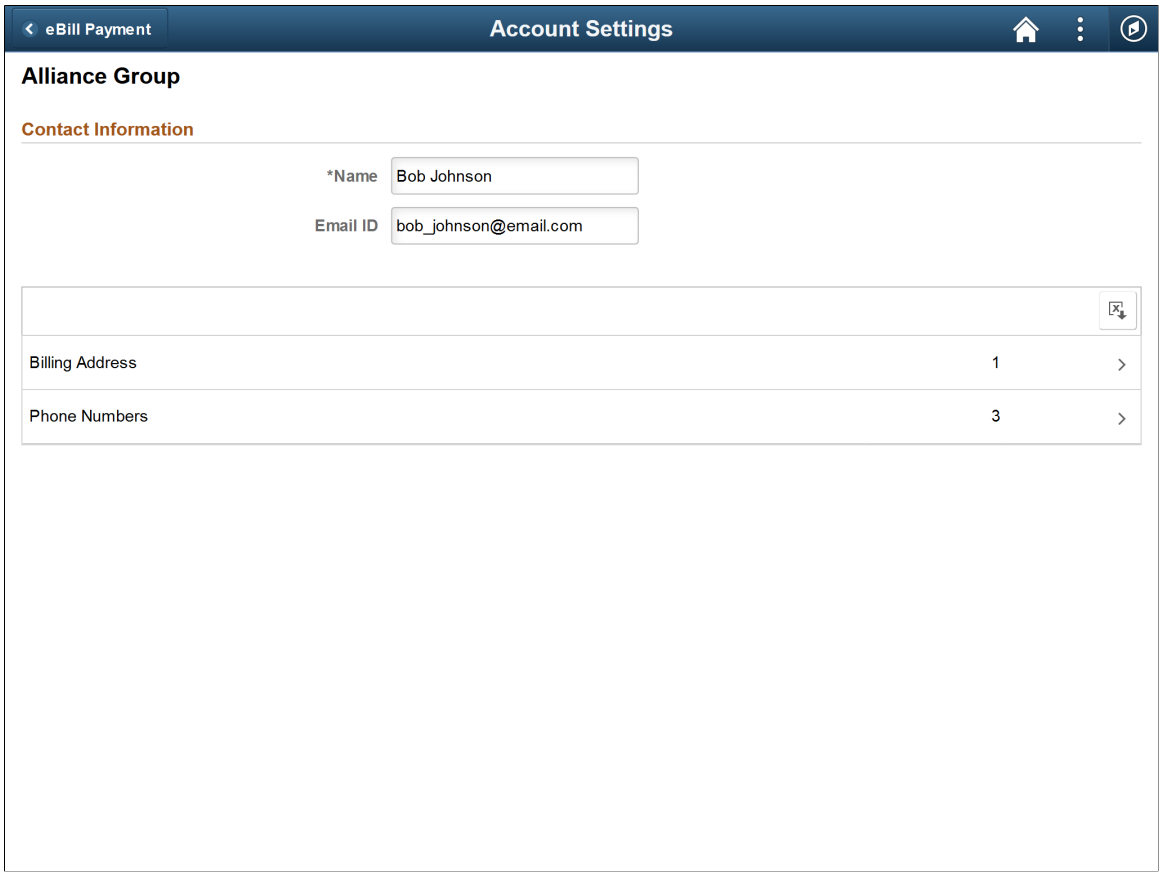
Account Settings Page

Use the Account Settings page to view contact information and access billing, phone, and credit card profile information.

Navigation:

Select the Account Settings tile on My Homepage.

This example illustrates the fields and controls on the Account Settings page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Name and **Email ID**	Displays available customer contact name and email address.

Access the billing addresses, phone numbers, and credit cards by selecting the respective rows in the **Details** grid. The number of billing addresses, phone numbers, and credit card profiles on file is shown on each row.

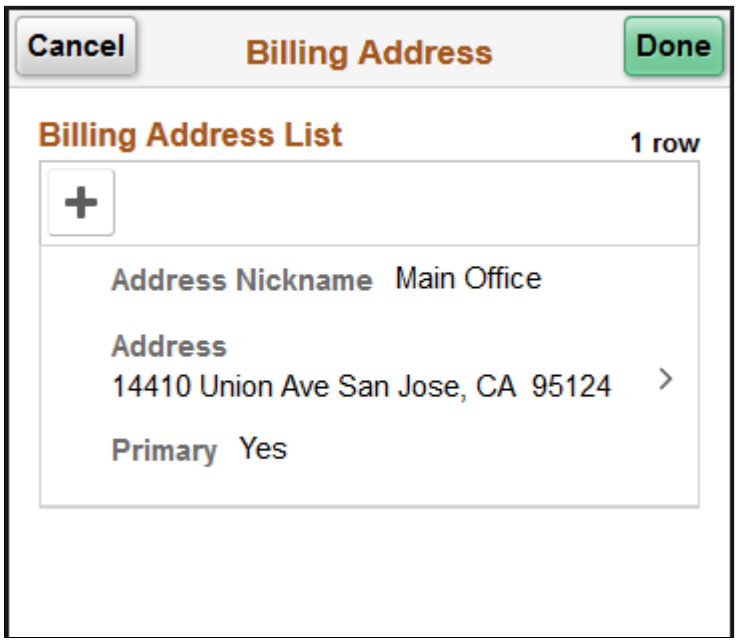
Account Settings - Billing Address Page (SFF)

Use the Account Settings - Billing Address page (SFF) to manage a customer's billing addresses.

Navigation:

Select the **Billing Address** row on the Account Settings page (SFF).

This example illustrates the fields and controls on the Account Settings - Billing Address page (SFF). You can find definitions for the fields and controls later on this page.



Select an address row in the list to edit or delete the address, or select the **Add** button to enter a new address.

The address fields are the same on the large form factor design; only the formatting is different.

Account Settings - Phone Numbers Page (SFF)

Use the Account Settings - Phone Numbers page (SFF) to manage a customer's phone information.

Navigation:

Select the **Phone Numbers** row on the Account Settings page (SFF).

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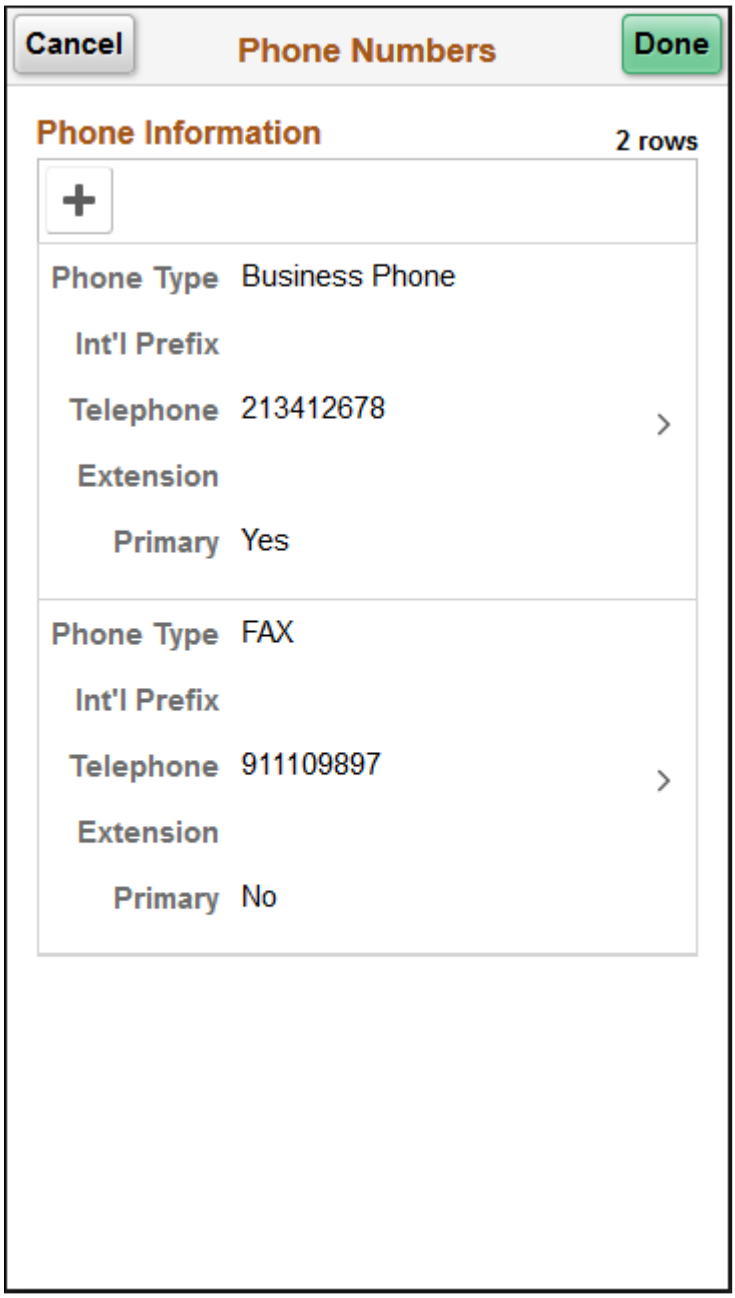
This example illustrates the fields and controls on the Account Settings - Phone Numbers page (SFF). You can find definitions for the fields and controls later on this page.



Select a row in the list to edit or delete the number, or select the **Add** button to enter a new number.

The **Phone Information** fields are the same on the large form factor design; only the formatting is different.

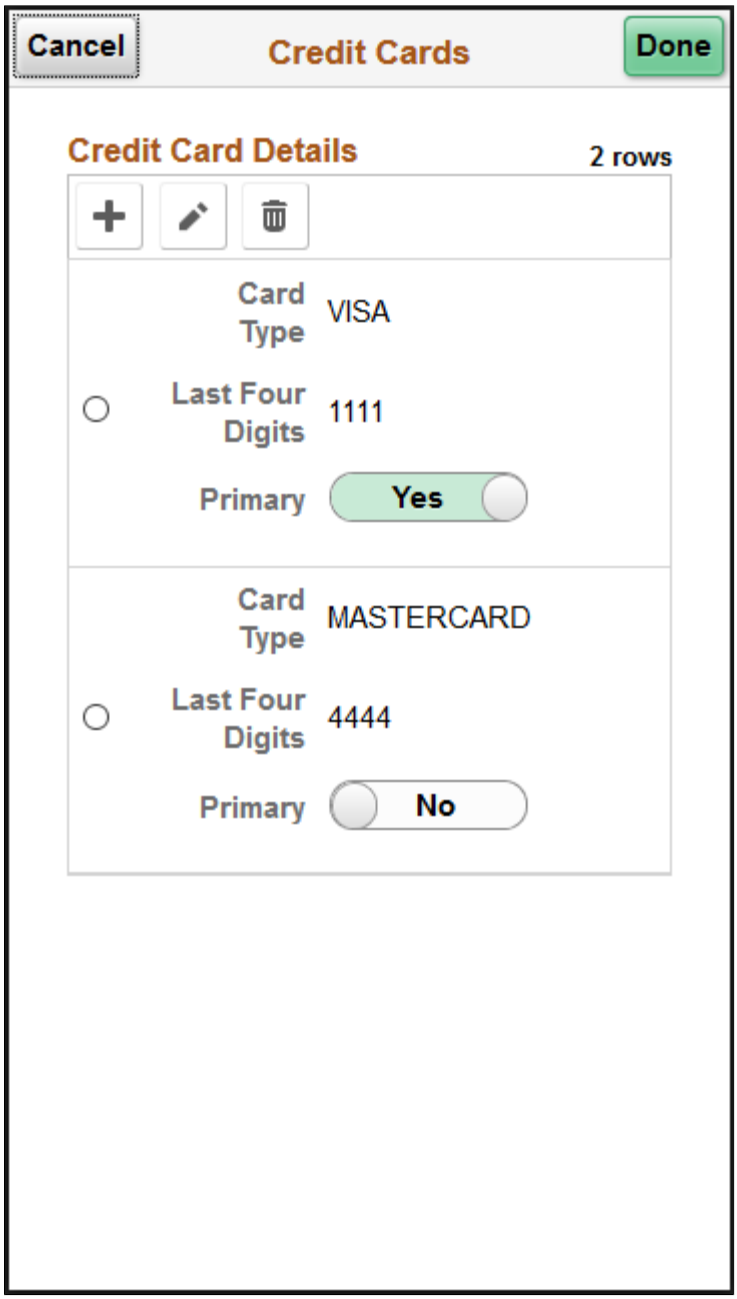
Account Settings - Credit Cards Page (SFF)

Use the Account Settings - Credit Cards page (SFF) to manage a customer's credit card profiles. Access third-party credit card hosting site to add and edit credit card information.

Navigation:

Select the **Credit Cards** row on the Account Settings page (SFF).

This example illustrates the fields and controls on the Account Settings - Credit Cards page (SFF). You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
+	Click to access the third-party credit card hosting site, where you can add credit card information and update the profile in Fluid eBill Payment.

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Field or Control	*Description*
	Click to access the third-party credit card hosting site, where you can edit information for the selected credit card and update the profile in Fluid eBill Payment.
	Click to delete the selected credit card profile in Fluid eBill Payment.
Primary	Select *Yes* to indicate the preferred credit card to use for payments. You must select one credit card to be the primary credit card.

The credit card details are the same on the large form factor design; only the formatting is different.

Setting Up User Options (Fluid)

This topic discusses how to set up user options for Fluid eBill Payment, including general, currency, and alert options.

Pages Used to Set Up User Options

Page Name	*Definition Name*	*Usage*
My Preferences - eBill Payment Page	EB_USER_PREF_SCF	Select default customer, payment and invoice delivery methods, and user currency settings. Select options to activate alerts, if enabled by the biller.
Customers Page (LFF and SFF)	EB_ACDET_CUST_SCF	Change the customer that is currently represented. Available only if the user has access to multiple Bill To customers.

My Preferences - eBill Payment Page

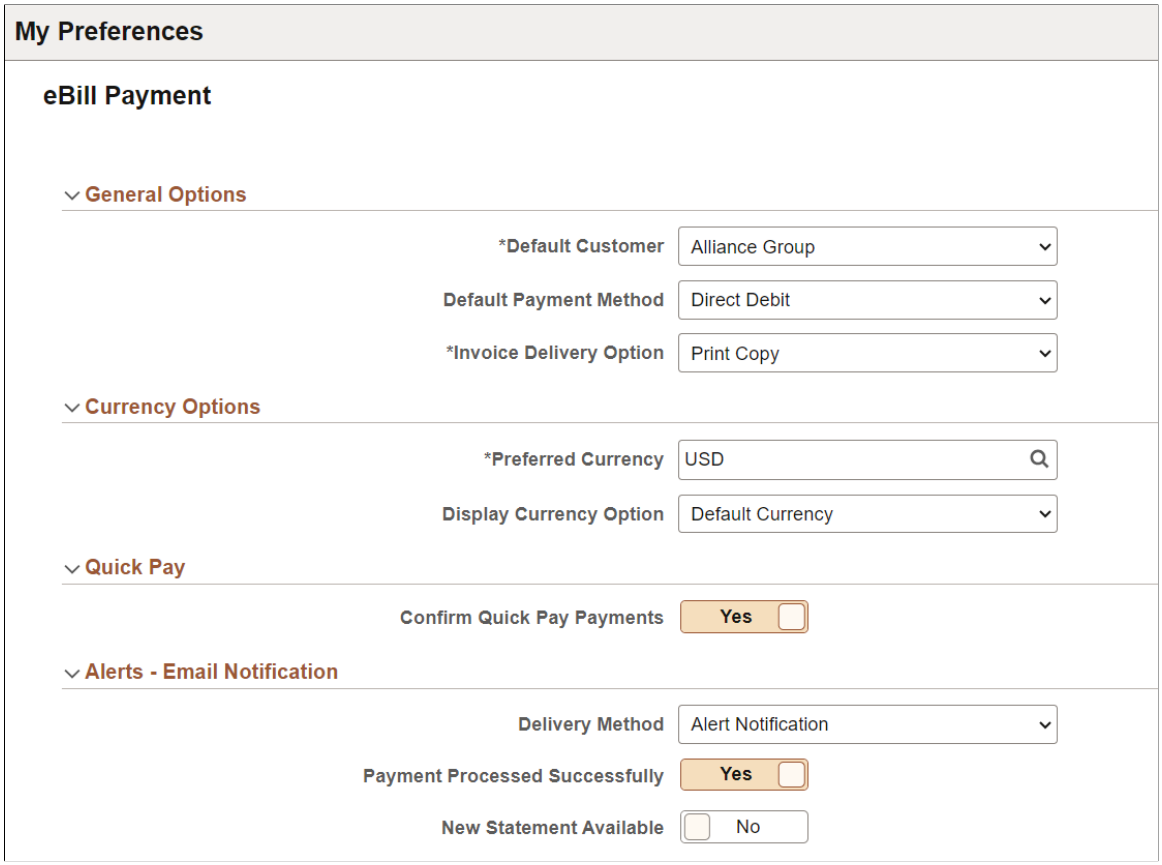
Use the My Preferences - eBill Payment page to select default customer, payment and invoice delivery methods, and user currency settings. Select options to activate alerts, if enabled by the biller.

Navigation:

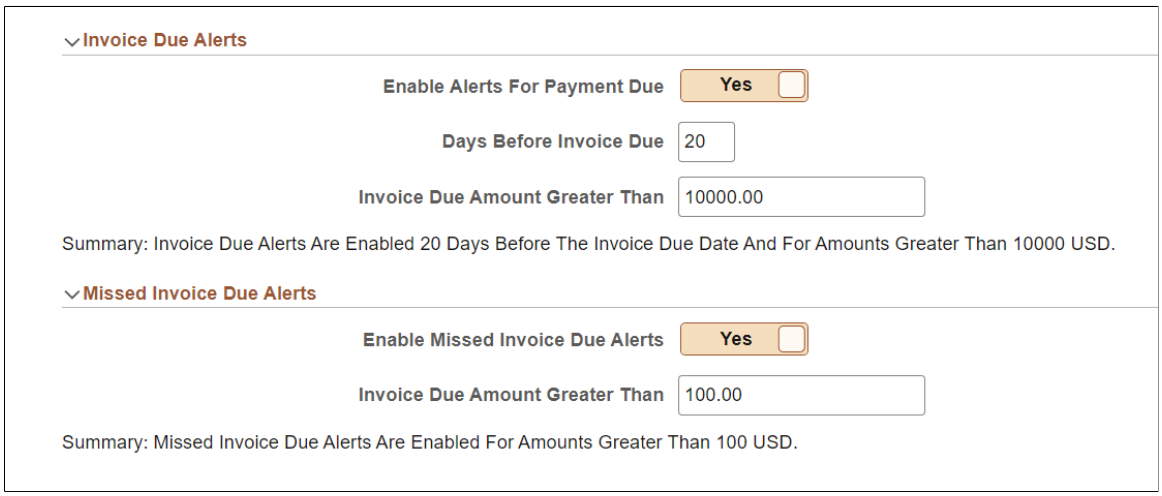
My Preferences Tile > eBill Payment

Note: You must be on a Fluid eBill Payment page by selecting a tile on My Homepage before accessing My Preferences for Fluid eBill Payment.
If enabled by the biller, select *My Preferences* from the Actions List button on the Fluid eBill Payment homepage to change advanced user options, such as regional settings and navigation personalizations.

This example illustrates the fields and controls on the My Preferences eBill Payment page (1 of 2).



This example illustrates the fields and controls on the My Preferences eBill Payment page (2 of 2).



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General Options

Field or Control	*Description*
Default Customer	Select the default customer account for tile and page data. Available only if the user has access to multiple Bill-To customers. Changing the default customer will not change the current customer. Use the Customer page or restart Fluid eBill Payment.
Default Payment Method	Select from the available payment methods: • *Credit Card* • *Direct Debit* • *Electronic Check* • *PayPal* Only payment methods enabled by the biller are available. In addition, your account must be set up to use the different available payment methods. To use PayPal, you must establish a PayPal customer account.
Invoice Delivery Option	Select *Email Notification* or *Print Copy*.

Currency Options

Field or Control	*Description*
Preferred Currency	Select a preferred display currency. The system converts multi-currency balances to the preferred currency for display, such as on the Account Summary and Make a Payment pages. The preferred currency is also used for the threshold amounts specified in the **Alerts** section on this page.
Display Currency Option	Select an option that determines the currency used to calculate display amounts. Select from these options: • *Default Currency* - Uses the customer's default currency. • *Preferred Currency* - Uses the **Preferred Currency** defined here in the Currency Options.

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Quick Pay

Field or Control	*Description*
Confirm Quick Pay Payments	Select *Yes* to confirm payments made through the Quick Pay tile before submitting them for payment.

Alerts - Email Notification

Alerts appear when enabled by the biller on Fluid eBill Payment installation pages.

Field or Control	*Description*
Delivery Method	Select *Alert Notification* to receive alerts in the notifications window accessed from the **Notifications** (flag) button on the My Homepage banner.
Payment Processed Successfully	Select *Yes* to receive an alert when a payment has been processed successfully and applied to the customer's account.
New Statement Available	Select *Yes* to receive an alert when a new statement is available.

Invoice Due Alerts & Missed Invoice Due Alerts

Field or Control	*Description*
Enable Alerts for Payment Due and **Enable Missed Invoice Due Dates**	Select *Yes* to enable the alert.
Days before Invoice due and **Invoices greater than**	Filter invoices by entering the minimum invoice amount that activates the alert. The currency represents the **Preferred Currency** defined on this page.
Missed Invoice Due Date and **Invoices greater than**	Filter invoices by entering the minimum invoice amount that activates the alert. The currency represents the **Preferred Currency** defined on this page.

Customers Page (LFF and SFF)

Use the Customer page to change the customer that is currently represented. Available only if the user has access to multiple Bill To customers.

To change the default customer, use the My Preferences page.

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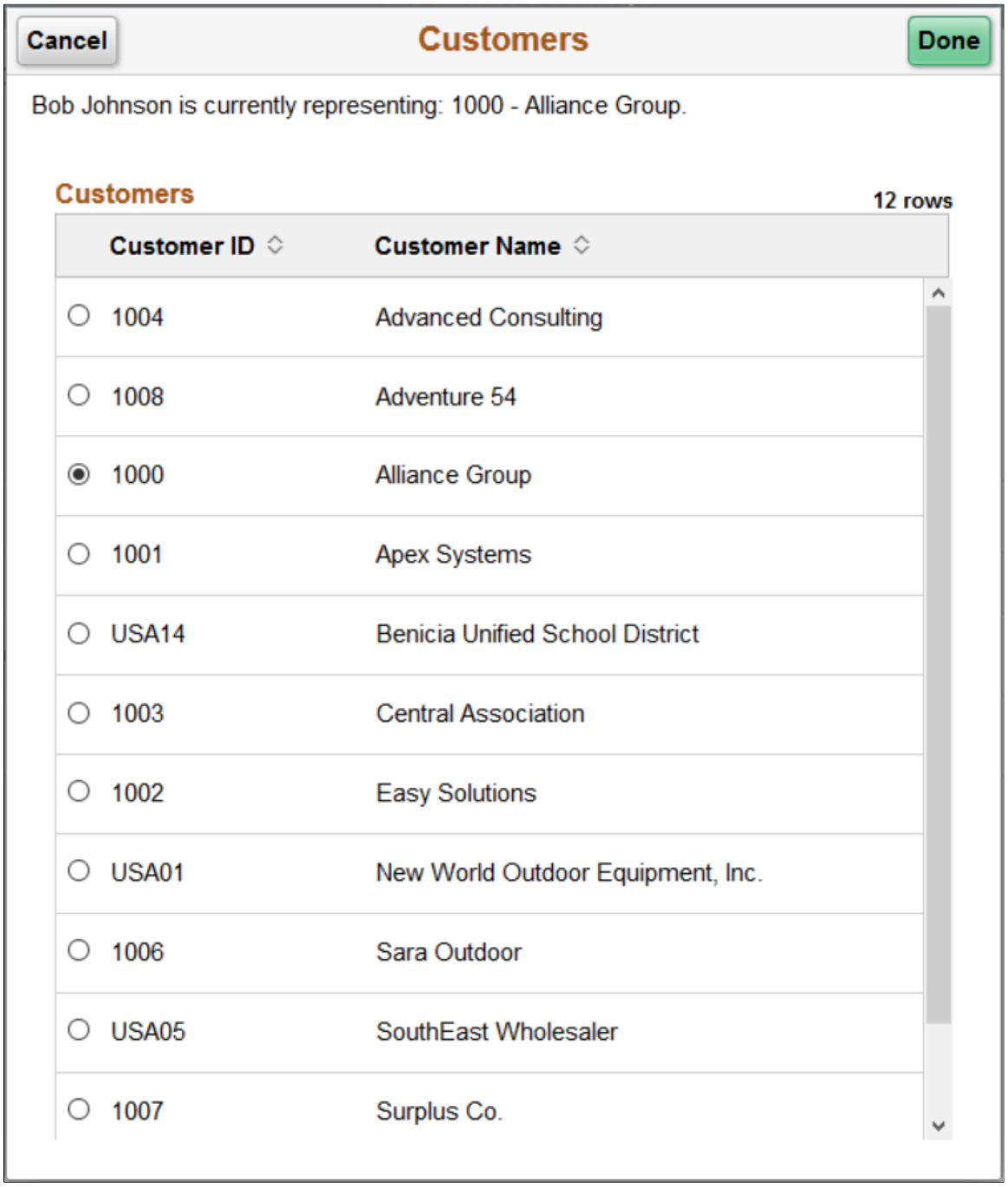
Navigation:

Select any tile except Payment Cart and Quick Pay on My Homepage in the customer portal. Click the **Actions List** button in the banner, then select *Customers*.

This example illustrates the fields and controls on the Customers page as displayed on a laptop. The fields are the same on smartphones; only the formatting is different. You can find definitions for the fields and controls later on this page.



The user only sees customers to which they have access. Customers are displayed regardless of their account balance.

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Chapter 8

Using the Customer Hierarchy in Fluid eBill Payment

Using the Customer Hierarchy (Fluid)

Page Used to Access the Fluid Customer Hierarchy

Page Name	*Definition Name*	*Usage*
Customer Hierarchy (Fluid) Page	EB_CUST_HIER_FL	View the Fluid customer hierarchy chart, analyze current balances, and view related billing information for a customer

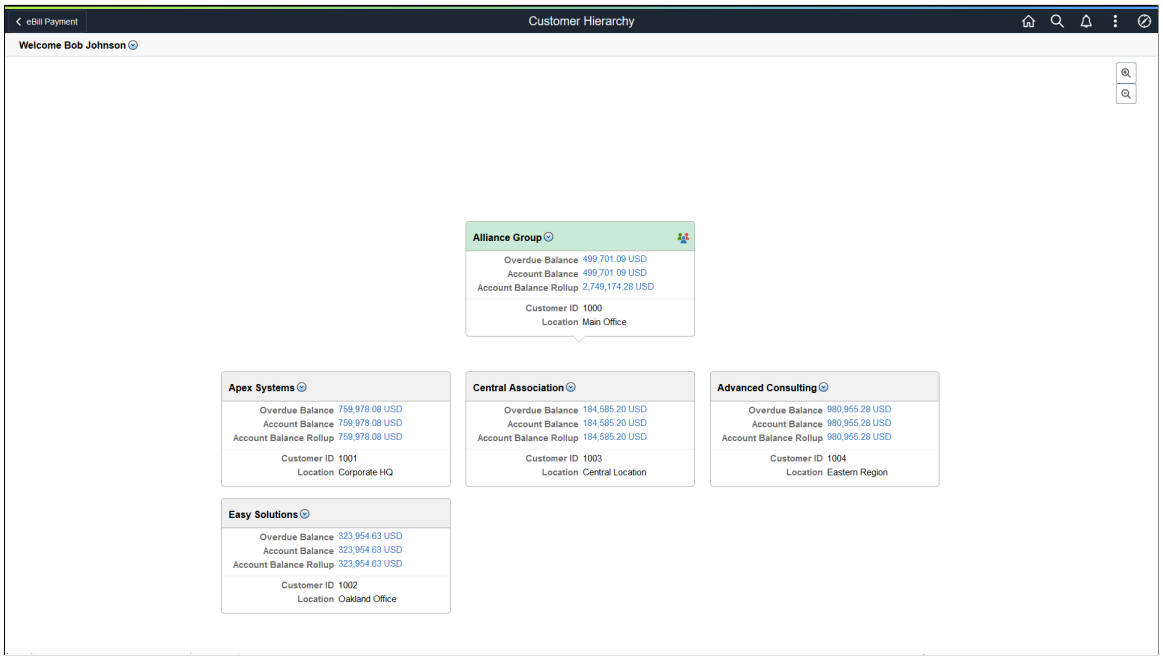
Customer Hierarchy (Fluid) Page

Use the Customer Hierarchy (Fluid) page (EB_CUST_HIER_FL) to view the Fluid customer hierarchy chart, analyze current balances, and view related billing information for a customer.

Navigation:

eBill Payment Home Page > **Customer Hierarchy (tile)** > **Customer Hierarchy**

This example illustrates the fields and controls on the Customer Hierarchy (Fluid) page.



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The Fluid Customer Hierarchy allows users to navigate to each customer and view current balances, related information, and perform certain actions for that customer.

The Fluid Customer Hierarchy is built based on the broker that is signed on. All customers that do not have parent customers represented by the broker appear as child nodes of the broker in the chart. All customers represented by the broker that have a parent represented by the broker appear as a child node of the represented parent. The focus customer is the default customer of contact. The focus customer appears in the center of the chart, has a different color, and includes the Show Peers icon. You can also bring focus to any customer by clicking it.

The Fluid Customer Hierarchy is built using row-level security for the broker. Only customers set up to be represented by the broker appear in the chart. A break in the hierarchy chain would be caused if the broker does not have row-level security for the child that is represented but does have row-level security for a grandchild. In this case, the system displays the grandchild as a child node of the broker.

Note: The Fluid Customer Hierarchy is designed and optimized for large form factor, and PeopleSoft recommends that it be used on a large form factor device. Users can access the customer hierarchy using a small form factor device, but the user experience may be limited.

Related Actions (User)

Use the Related Actions drop-down next to the user ID to access the Account Settings - Contact Information Page (LFF) and Account Settings - Billing Address Page (LFF). Use these pages to manage contact and billing address information for the parent customer.

Related Actions (Customer)

Use the Related Actions drop-down next to a customer to view:

- Account Summary information
- Statements
- Invoice information
- Invoices to pay information

Related Actions enables you to navigate to the corresponding Fluid eBill Payment components to perform actions for a customer. You can select an action from any customer on the chart, thus enabling you to process payments for any customer in the hierarchy.

For more information, see:

Reviewing Account Summary Information (Fluid)

Reviewing Invoices (Fluid)

Viewing Statements (Fluid)

Using the Payment Cart in Fluid eBill Payment

Show Peers

Use the Show Peers icon to view customer siblings.

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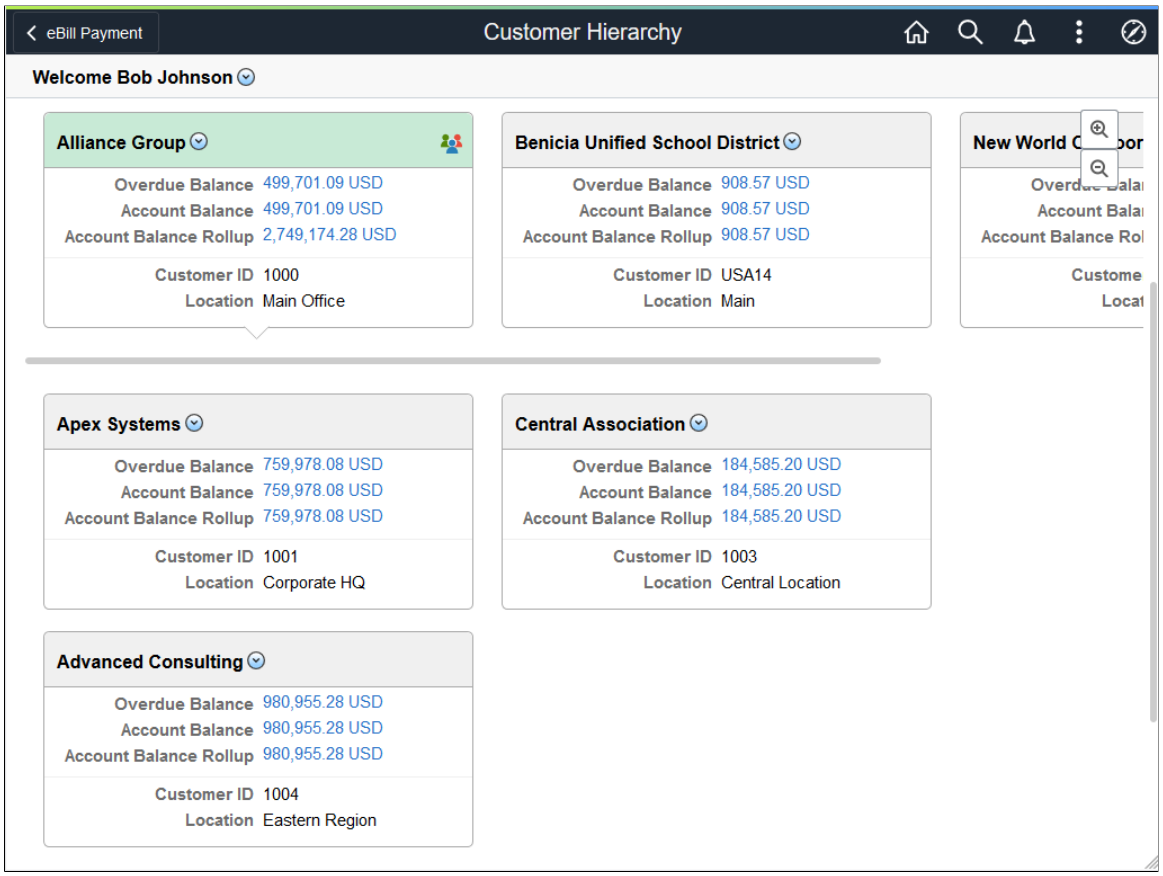
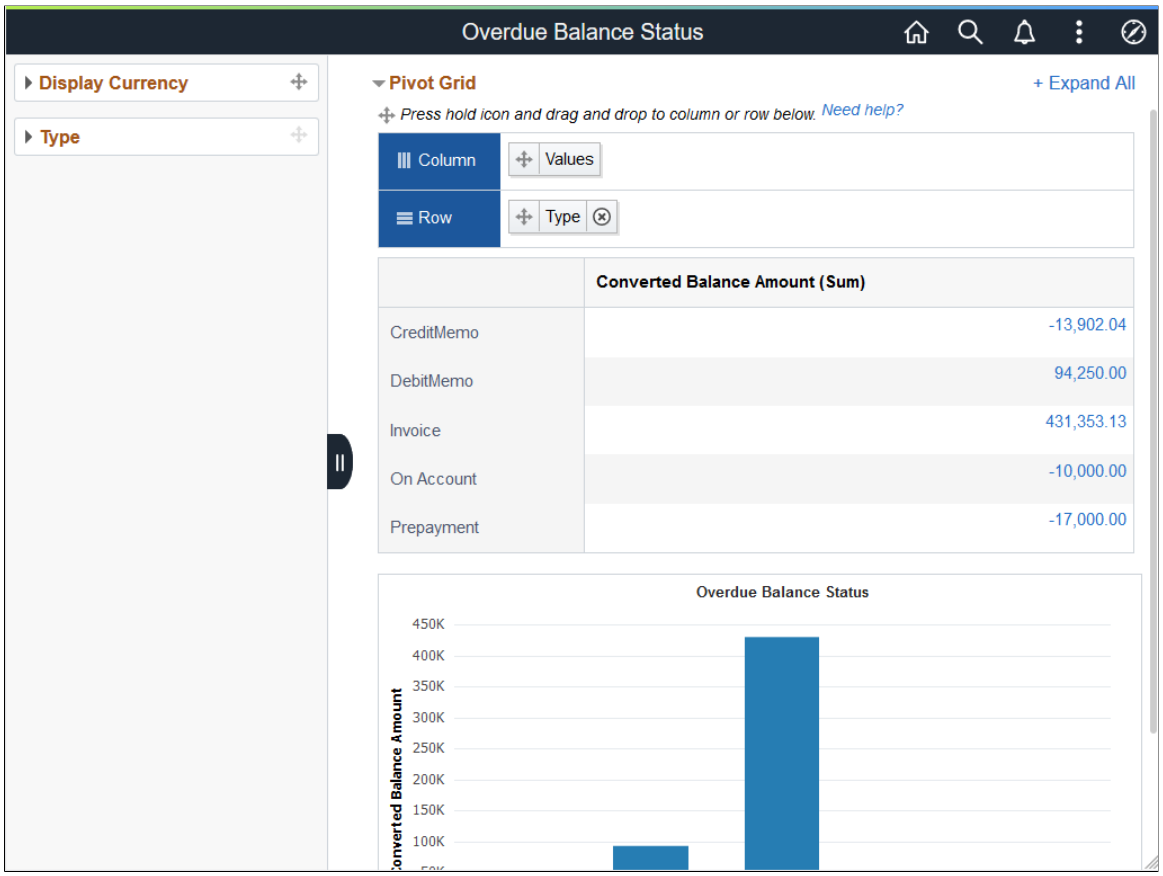
Show Peers page



Drilling Down on Customer Billing Information

Use the Overdue Balance link to view and analyze customer overdue balance information.

Overdue Balance Status Page



Use the Account Balance link to view and analyze customer account balance history.

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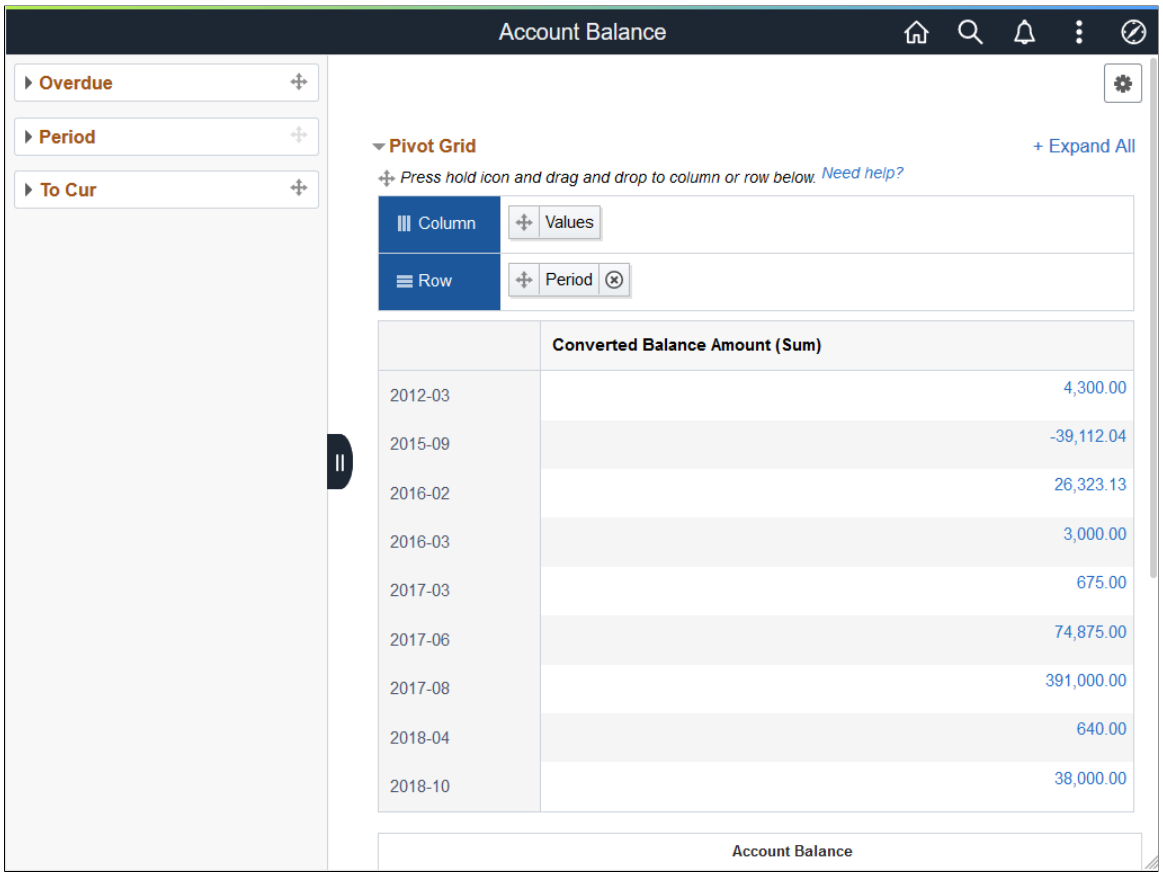
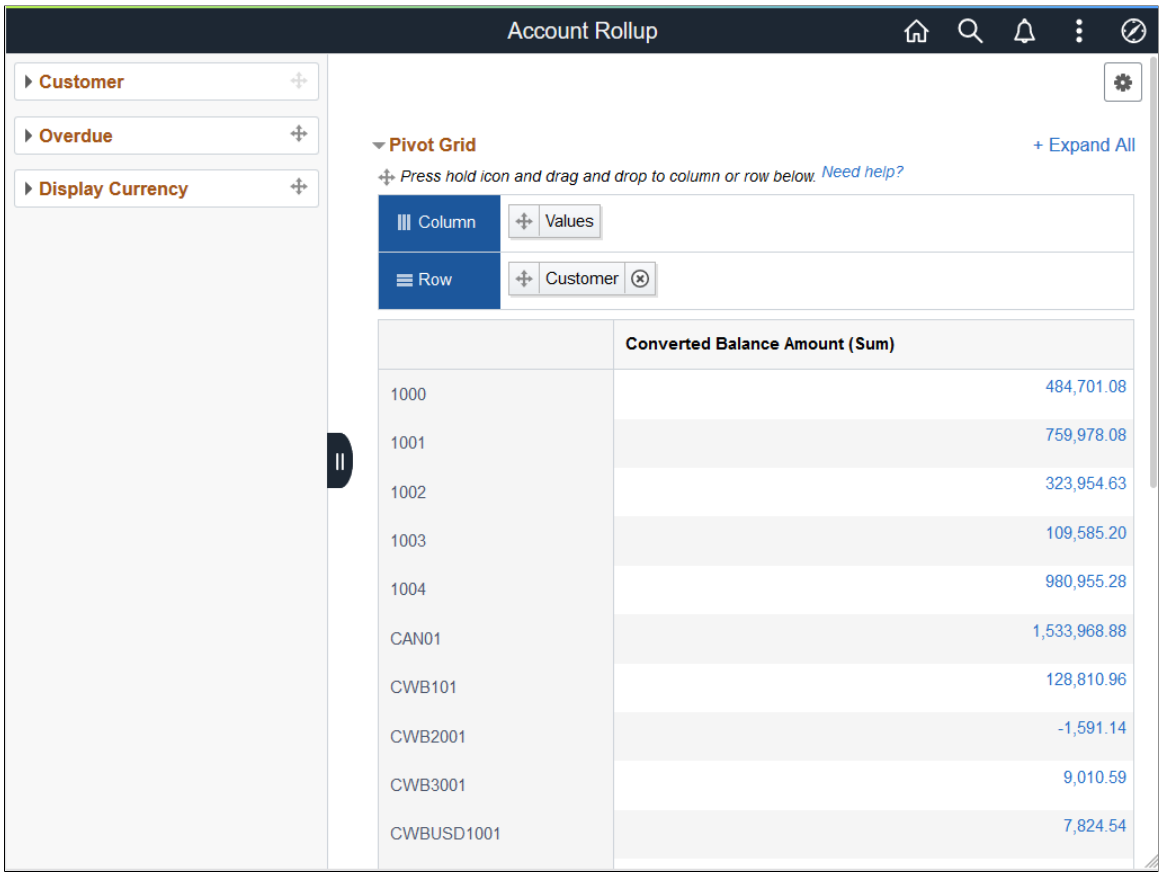
Account Balance Page



Use the Account Balance Rollup link to view and analyze rollup account information by customer.

Account Rollup Page



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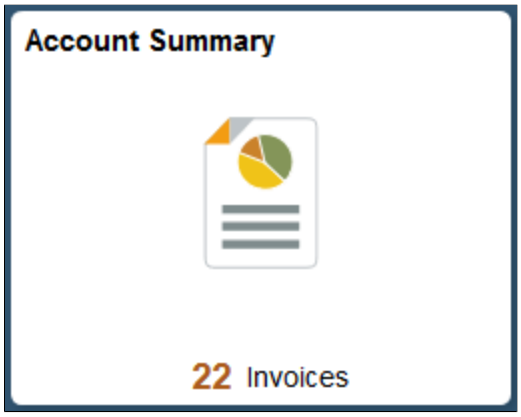
Chapter 9

Reviewing Accounts and Payments in Fluid eBill Payment

Reviewing Account Summary Information (Fluid)

This topic discusses the account information you can view in Fluid eBill Payment when you select the Account Summary tile.

This example illustrates the fields and controls on the Account Summary tile.



The Account Summary pages in the large form factor (LFF) and small form factor (SFF) designs display the same information, including the following:

- Total Balance
- Past Due Balance
- Recent Invoices
- Recent Payments
- Aging Graph
- Credit Information Graph

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Pages Used to Review Account Information (Fluid)

Page Name	*Definition Name*	*Usage*
Account Summary Page (LFF) Account Summary Page (SFF)	EB_ACTG_SUMRY_FL	Review account balance, recent invoices and payments, and aging and credit information.
Invoice Balances Page (LFF)	EB_INVOICES_FL	View invoice balances that comprise the total balance on the account, view invoices that are past due, or view recent invoices. Select and pay invoices.
Invoice Balances Page (SFF)	EB_SM_INVC_LST_FL	View invoice balances that comprise the total balance on the account, or view invoices that are past due. Select and pay invoices.
Invoice Balances - Invoice Filters Page	INVOICE_FILTER_FL	Narrow the invoices in the list by the available parameters, including invoice date, invoice ID, invoice status, entry type, invoice amount, collection status, and others.
Invoice Summary Page (LFF and SFF)	EB_INVC_SUMMRY_SCF EB_INVOICE_DTL_SCF	Review invoice details. Review invoice details and access the Message Center and Invoice Activity in the small form factor design.
Recent Payments Page (LFF)	EB_PAYMENTS_FL	Review payments.
Payment Detail Page (LFF and SFF)	EB_PAYMENT_DTL_SCF	Review payment details.

Account Summary Page (LFF)

Use the Account Summary page to review account balance, recent invoices and payments, and aging and credit information.

The same account information is displayed in both the large and small form factor designs.

Navigation:

Select the Account Summary tile on My Homepage in the customer portal.

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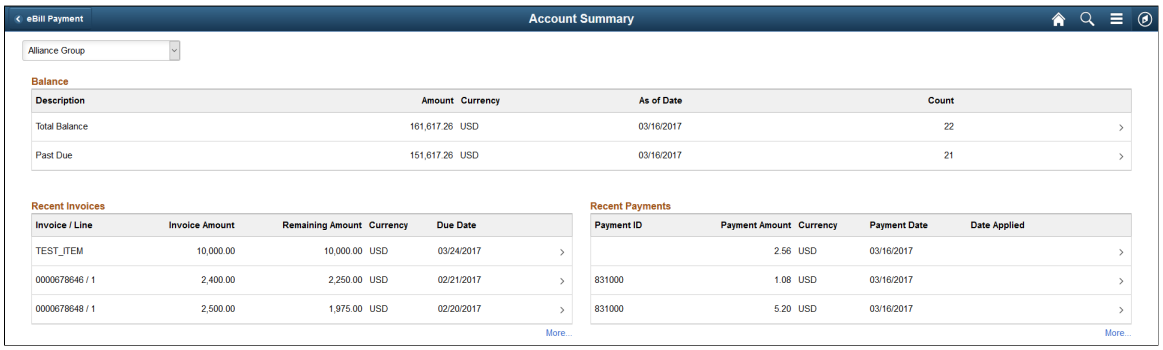
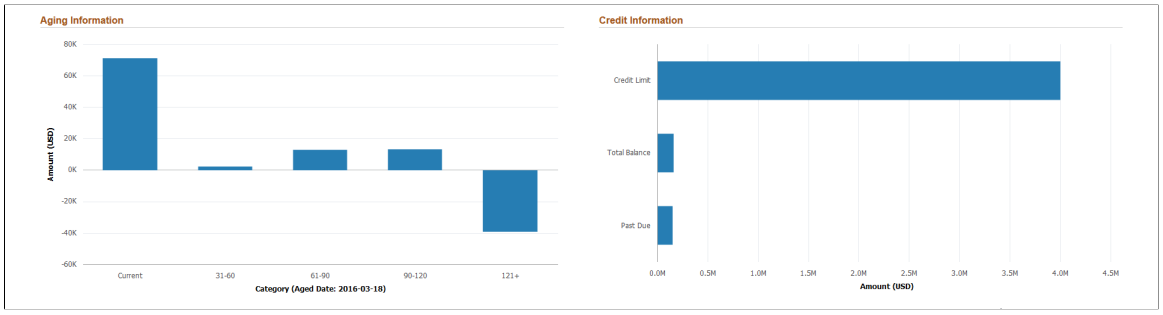
This example illustrates the fields and controls on the Account Summary page, 1 of 2 (LFF). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Account Summary page, 2 of 2 (LFF). You can find definitions for the fields and controls later on this page.



The customer title drop-down list enables brokers or users representing multiple customers to view data based on the selected customer.

Balance

Field or Control	*Description*
Total Balance	Displays the total balance for the account, and shows the number of open invoices included in the total balance. The amount is shown in the display currency, which is defined on the My Preferences Page. Click the **Total Balance** row to access the Invoice Balances page and review open invoices that make up the total balance for a customer. You can view invoice detail and add invoices to the Payment Cart.

Field or Control	*Description*
Past Due	Click the **Past Due** row to access the Invoice Balances page and review open invoices that make up the past due balance only. You can view invoice detail and add invoices to the Payment Cart. Shows the display currency as defined on the My Preferences page.

Recent Invoices

The Recent Invoices table displays the three most recent invoices. Click the **More...** link in the large form factor design to see additional recent invoices. **Currency** is the invoice currency and **Due Date** is the date the invoice is due.

Field or Control	*Description*
Invoice / Line	Select an invoice or line row to view the Invoice Summary page.
Invoice Amount and **Remaining Amount**	Displays the amount on the invoice and the amount remaining on the balance after partial payments are made against the invoice.

Recent Payments

The Recent Payments table displays the three most recently posted or pending payments. Click the **More...** link in the large form factor design to see additional recent payments. **Currency** is the payment currency.

Field or Control	*Description*
Payment ID and **Payment Amount**	Displays the payment identification number and payment amount. Click a payment row to review payment details on the Payment Detail page (EB_PAYMENT_DTL_SCF). Pending payments do not have a payment ID. Payment details are available when posting is complete.

Aging Information

View aging information based on the last time the aging process ran.

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Field or Control	*Description*
Amount	Displays overdue amounts for each overdue aging category on the y-axis. Aging Count lists the number of invoices in each aging category.
Category (Aged Date = YYYY-MM-DD)	Displays overdue categories, such as Future, Current, 31-60, 61-90, 91-120, and 121+ days. These categories may be different, depending on what you define for the aging ID during setup. The Aged Date is the date that the Aging process was last run.

Credit Information

View your account's credit limit, total balance, and past due amounts in the bar graph. The category – credit limit, total balance, and past due – is on the y-axis. The amount is shown on the x-axis. Currency for the amount is the display currency, defined in My Preferences for the Account Summary page.

Account Summary Page (SFF)

Use the Account Summary page to review account balance, recent invoices and payments, and aging and credit information.

The same account summary information is displayed in both the large and small form factor designs.

Navigation:

Select the Account Summary tile on My Homepage in the customer portal.

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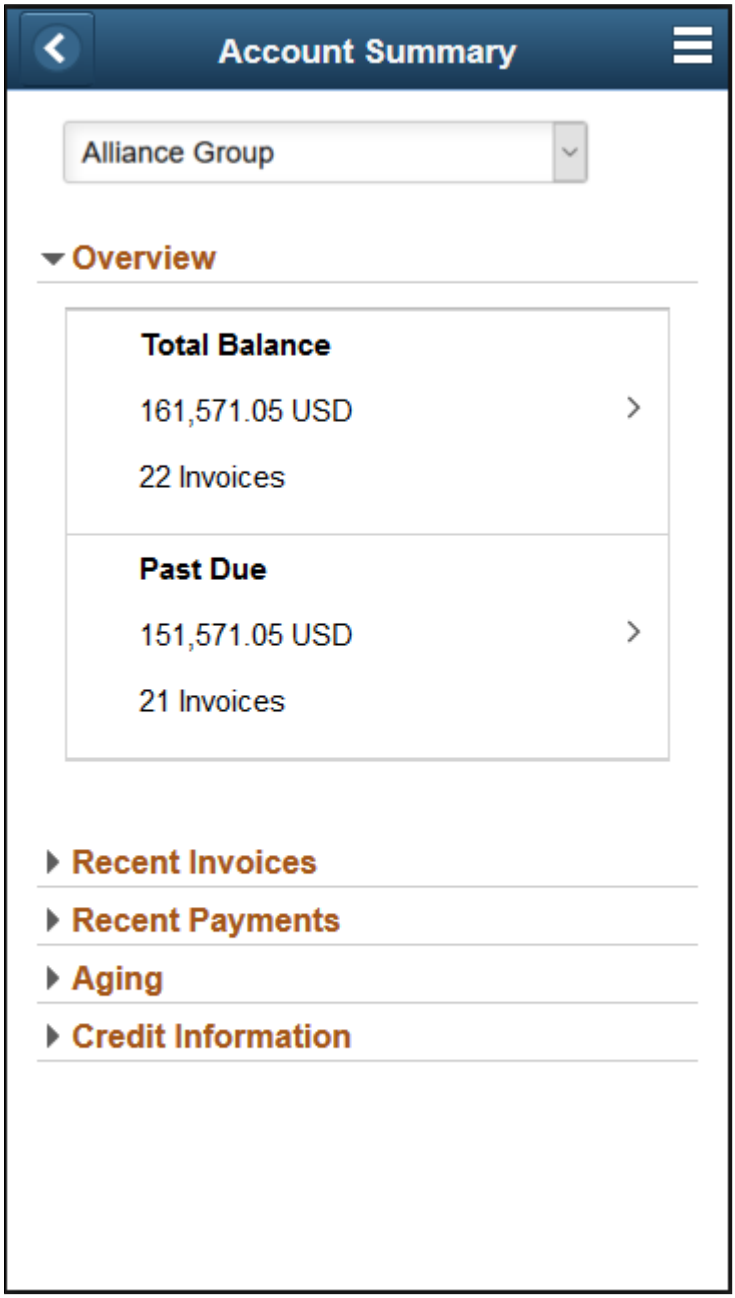
This example illustrates the fields and controls on the Account Summary page (SFF).



Expand the sections to view:

- Total balance summary
- Past due invoice summary
- Three most recent invoices
- Three most recent payments
- Aging graph

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- Credit information graph

For more information about the fields and controls, see Account Summary Page (LFF).

In the small form factor design, select an aging category bar in the graph to open the Aging Category Detail page (EB_SM_AGE_INVC_SCF), where you can review invoices in the selected aging category. Further drill into details to review an invoice summary for each invoice.

Invoice Balances Page (LFF)

Use the Invoice Balances page to view invoice balances that comprise the total balance on the account, or view invoices that are past due. Select and pay invoices.

View additional recent invoices in the large form factor design.

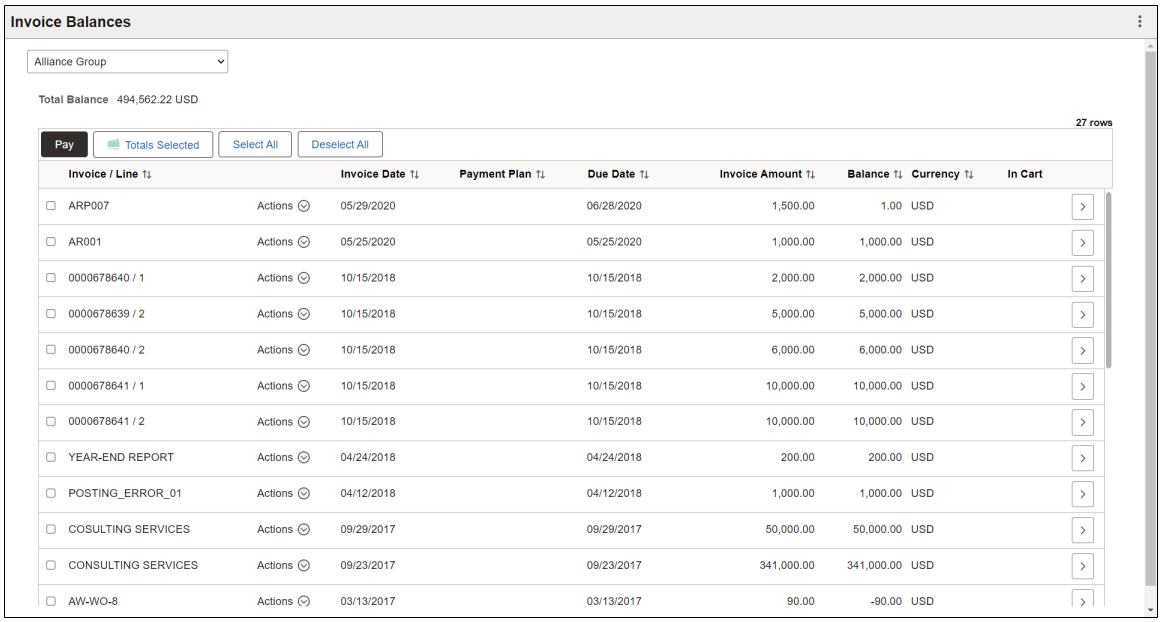
Navigation:

Click the **Total Balance** row on the Account Summary page to view invoice balances that comprise the total balance.

Click the **Past Due** row on the Account Summary page to view invoices that are past due.

Click the **More...** link for the **Recent Invoices**. (LFF only).

This example illustrates the fields and controls on the Invoice Balances page when accessed by clicking the Total Balance row on the Account Summary page. You can find definitions for the fields and controls later on this page.



Invoice / Line		Invoice Date	Payment Plan	Due Date	Invoice Amount	Balance	Currency	In Cart
ARP007	Actions	05/29/2020		06/28/2020	1,500.00	1.00	USD	
AR001	Actions	05/25/2020		05/25/2020	1,000.00	1,000.00	USD	
0000678640 / 1	Actions	10/15/2018		10/15/2018	2,000.00	2,000.00	USD	
0000678639 / 2	Actions	10/15/2018		10/15/2018	5,000.00	5,000.00	USD	
0000678640 / 2	Actions	10/15/2018		10/15/2018	6,000.00	6,000.00	USD	
0000678641 / 1	Actions	10/15/2018		10/15/2018	10,000.00	10,000.00	USD	
0000678641 / 2	Actions	10/15/2018		10/15/2018	10,000.00	10,000.00	USD	
YEAR-END REPORT	Actions	04/24/2018		04/24/2018	200.00	200.00	USD	
POSTING_ERROR_01	Actions	04/12/2018		04/12/2018	1,000.00	1,000.00	USD	
COSULTING SERVICES	Actions	09/29/2017		09/29/2017	50,000.00	50,000.00	USD	
CONSULTING SERVICES	Actions	09/23/2017		09/23/2017	341,000.00	341,000.00	USD	
AW-WO-8	Actions	03/13/2017		03/13/2017	90.00	-90.00	USD	

The fields on the Total Balance - Invoice Balances page and the Past Due – Invoice Balances page are the same.

Field or Control	*Description*
Total Balance	Shows the total balance on the account in your preferred display currency. Define the preferred display currency on the My Preferences page.
Pay (Pay this Bill)	Select invoices and click the **Pay** button to proceed to the Payment Cart.
Totals Selected	Appears when the account contains invoices with multiple currencies. Click the Totals Selected button to view the number of invoices selected and the payment amount for each currency.
	Select the Filter Items button to open the Filter Invoices page, where you can narrow the results you see on the Invoice Balances page, as you would using a search page. The filter is available only when you access the Invoice Balances page by clicking the **More...** button under the **Recent Invoices** table.
Invoice / Line	Displays the invoice or line identification number, invoice date, due date, invoice amount, and balance due in the invoice currency. Select an invoice or line to view the Invoice Summary page.
Actions	Click to open a list of available actions. Select from the following options: • *Invoice Details* - Select to open the Invoice Details page (EB_INVOICE_DTL_SCF) showing line item details for the invoice. • *Message Center* - Select to review messages associated with the invoice. • *Invoice Activity* - Select to open the Invoice Activity page (EB_INVOICE_ACV_SCF) for the invoice. • *Invoice Attachment* - Select to open the Invoice Attachments page (INVOICE_ATT_V2_SCF), from which you can view invoice supporting documents. • *Invoice Image* - Available if an invoice image is available. • *Email Invoice* - Select to open the Email Invoice Copy page (EMAIL_INVOICES_FL) to send a copy of the invoice by email.
Invoice Date	Displays the date of the invoice.
Due Date	Displays the due date of the invoice.

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Field or Control	*Description*
Invoice Amount and **Balance Amount**	Displays the invoice amount and the balance remaining on the invoice.
Currency	Displays the invoice currency.
	Indicates that the invoice is already in the Payment Cart.
	Select the Detail button to open the Invoice Summary page for an invoice.

Invoice Balances Page (SFF)

Use the Invoice Balances page to view invoice balances that comprise the total balance on the account, or view invoices that are past due. Select and pay invoices.

Navigation:

Click the **Total Balance** row on the Account Summary page to view invoice balances that comprise the total balance.

Click the **Past Due** row on the Account Summary page to view invoices that are past due.

Field or Control	*Description*
	Select the Filter button to open the Filter Invoices page, where you can narrow the results you see on the Invoice Balances page, as you would using a search page.
	Select the Edit button to select one or more invoices and click the Pay button to add the invoices to the Payment Cart.
and	Select all invoices or deselect all invoices in edit mode.
	Select the Sort Invoice Detail button in the small form factor design to sort invoices by the invoice fields, such as by invoice/line, invoice date, due date, invoice amount, and balance. If a sorting option is in use, the sort button is green.
Pay	Select invoices in edit mode, then click the **Pay** button to proceed to the Payment Cart.

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Details for each invoice are the same as on the large form factor design. See Invoice Balances Page (LFF).

Select an **Invoice / Line** row to open the Invoice Summary page, where you can review additional invoice and line header details.

Invoice Balances - Invoice Filters Page

Use the Invoice Filters page to narrow the invoices in the list by the available parameters, including invoice date, invoice ID, invoice status, entry type, invoice amount, collection status, and others.

Filter fields are the same on both large and small form factor designs.

Navigation:

- (LFF) Select the Filters button on the Recent Invoices - Invoice Balances page.
- (SFF) Select the Filters button on the Total Balances - Invoice Balances page or Past Due - Invoice Balances page.

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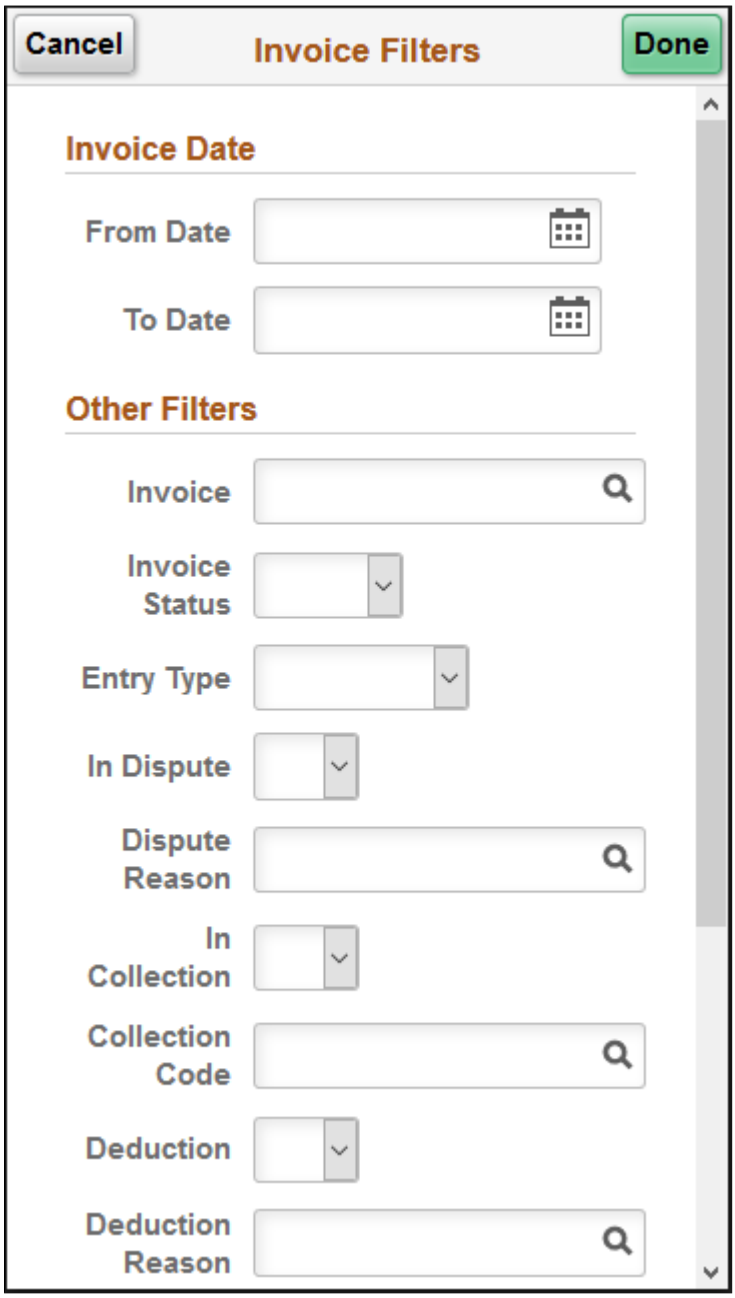
This example illustrates the fields and controls on the Invoice Balances - Invoice Filters page (SFF). You can find definitions for the fields and controls later on this page.



Invoice Date

Field or Control	*Description*
From Date	Enter a date or select a date from the calendar to display all invoice dates that are on or after the specified date.

Field or Control	*Description*
To Date	Enter a date or select a date from the calendar to display all invoice dates that are on or before the date specified.

Other Filters

Other filters include the following:

- **Invoice**
- **Invoice Status** (*<blank>*, *Open*, or *Closed*)
- **Entry Type** (*<blank>*, *CreditMemo*, *DebitMemo*, *Invoice*, or *Overdue*)
- **In Dispute**
- **Dispute Reason**
- **In Collection**
- **Collection Code**
- **Deduction**
- **Deduction Reason**
- **From Invoice Amount**
- **To Invoice Amount**
- **Currency**

Invoice Summary Page (LFF and SFF)

Use the Invoice Summary page to review invoice details.

Review invoice details and access the Message Center and Invoice Activity in the small form factor design.

Invoice fields are the same on both large and small form factor designs.

Navigation:

- (LFF) Select an invoice in the **Recent Invoices** grid on the Account Summary page.
- (LFF) Select the **Detail** button for an Invoice / Line row on the Invoice Balances page.
- (SFF) Select an invoice in the **Recent Invoices** section on the Account Summary page.
- (SFF) Select a **Invoice / Line** row on the Invoice Balances page.

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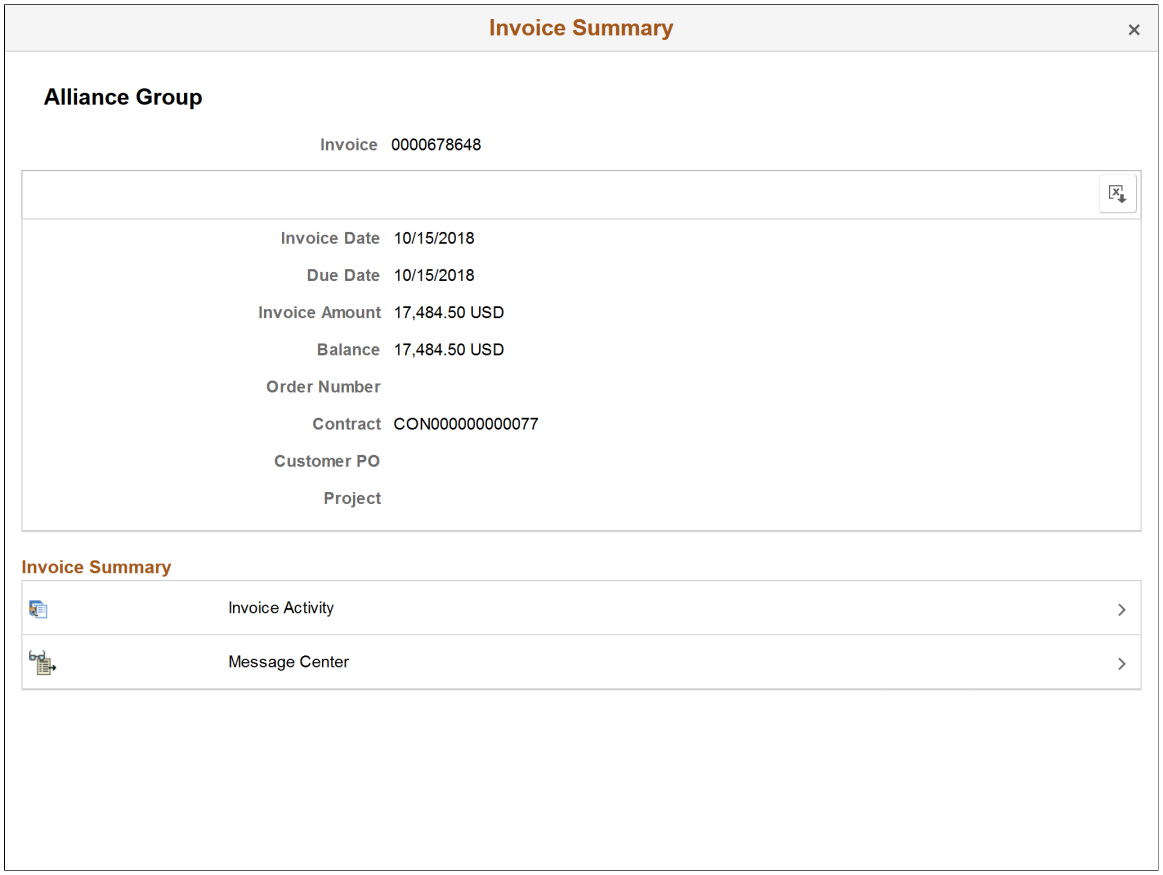
This example illustrates the fields and controls on the Invoice Summary page.



Recent Payments Page (LFF)

Use the Recent Payments page to review payments.

Navigation:

Click the **More...** link for the **Recent Payments** grid on the Account Summary page.

Payment Detail Page (LFF and SFF)

Use the Payment Detail page to review payment details.

Invoice fields are the same on both large and small form factor designs.

Navigation:

- (LFF) Select a payment row in the **Recent Payments** grid on the Account Summary page.
- (LFF) Select the **Payment Detail** button for a payment on the Recent Payments page.
- (SFF) Select a payment row in the **Recent Payments** section on the Account Summary page.

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Reviewing Invoices (Fluid)

This topic discusses the invoice information you can review in Fluid eBill Payment when you select the Invoices tile.

This example illustrates the fields and controls on the Invoices tile. You can find definitions for the fields and controls later on this page.

Using the Invoice pages in the large form factor (LFF) and small form factor designs (SFF), you can do the following:

- Review a list of invoices.
- Sort or filter invoices.
- Access the Message Center to send a message regarding an invoice.
- View invoice activity.

See also the Account Summary, where you can view recent invoices and invoice balances for payment.

Pages Used to Review Invoices

Page Name	***Definition Name***	***Usage***
Invoices Page (LFF)	EB_INVOICES_FL	Review invoices.
Invoices Page (SFF)	EB_INVOICES_FL	Review invoices.
Invoices - Invoice Filters Page	INVOICE_FILTER_FL	Narrow the results on the Invoices list page by the available parameters.
Invoice Summary Page (LFF)	INVOICE_SUMRY_SCF	View invoice header information.
Invoice Summary Page (SFF)	EB_INVOICE_DTL_SCF	View invoice header information. Access invoice activity and the Message Center.

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Invoices Page (LFF)

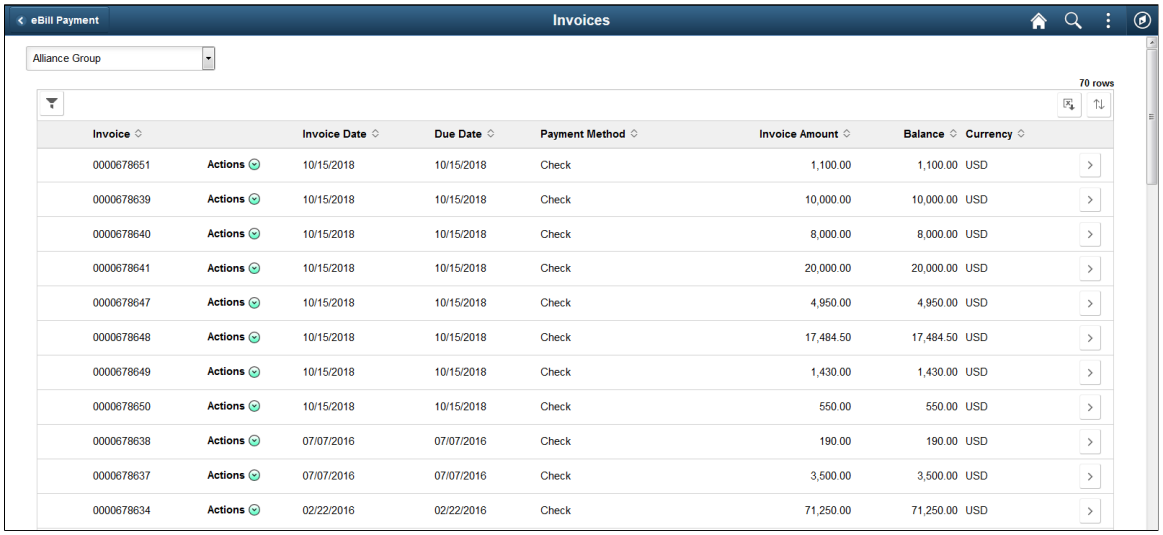
Use the Invoices page to review invoices.

Note: Depending on biller settings, the invoices shown may not include all invoices for a customer. The biller may choose to filter out the oldest invoices as of a certain date, for example.

Navigation:

Select the Invoices tile on My Homepage in the customer portal.

This example illustrates the fields and controls on the Invoices page (LFF). You can find definitions for the fields and controls later on this page.



Invoice		Invoice Date	Due Date	Payment Method	Invoice Amount	Balance	Currency
0000678651	Actions	10/15/2018	10/15/2018	Check	1,100.00	1,100.00	USD
0000678639	Actions	10/15/2018	10/15/2018	Check	10,000.00	10,000.00	USD
0000678640	Actions	10/15/2018	10/15/2018	Check	8,000.00	8,000.00	USD
0000678641	Actions	10/15/2018	10/15/2018	Check	20,000.00	20,000.00	USD
0000678647	Actions	10/15/2018	10/15/2018	Check	4,950.00	4,950.00	USD
0000678648	Actions	10/15/2018	10/15/2018	Check	17,484.50	17,484.50	USD
0000678649	Actions	10/15/2018	10/15/2018	Check	1,430.00	1,430.00	USD
0000678650	Actions	10/15/2018	10/15/2018	Check	550.00	550.00	USD
0000678638	Actions	07/07/2016	07/07/2016	Check	190.00	190.00	USD
0000678637	Actions	07/07/2016	07/07/2016	Check	3,500.00	3,500.00	USD
0000678634	Actions	02/22/2016	02/22/2016	Check	71,250.00	71,250.00	USD

The system displays invoices by order of invoice date, from the most recent to the oldest.

The customer list enables brokers or users representing multiple customers to view data based on the selected customer.

Field or Control	***Description***
	Select the Filter button to open the Filter Invoices page, where you can narrow the results you see on the Invoice page, as you would using a search page. If a filter option is in use, the filter button is green.
	Select the Consolidated Invoice icon to open the Consolidated Invoice Summary page (EB_CONSOL_INVC_SCF), where you can review multiple invoices rolled up under one invoice header.
Invoice	Displays the invoice number.

Field or Control	*Description*
Actions	Click to open a list of available actions. Select from the following options: • *Invoice Details* - Select to open the Invoice Details page (EB_INVOICE_DTL_SCF) showing line item details for the invoice. • *Message Center* - Select to review messages associated with the invoice. • *Invoice Activity* - Select to open the Invoice Activity page (EB_INVOICE_ACV_SCF) for the invoice. • *Invoice Attachment* - Select to open the Invoice Attachments page (INVOICE_ATT_V2_SCF), from which you can view invoice supporting documents. • *Invoice Image* - Available if an invoice image is available. • *Email Invoice* - Select to open the Email Invoice Copy page (EMAIL_INVOICES_FL) to send a copy of the invoice by email.
Invoice Date	Displays the date on which the invoice was sent.
Due Date	Displays the date on which the invoice balance is due.
Payment Method	Displays the default payment method associated with the invoice.
Invoice Amount	Displays the total amount of the invoice, equal to the sum of the net extended amount, the total value added tax amount, and the total sales and use tax of the bill.
Balance	Displays the current balance of the invoice, reduced by any payments that are paid toward the invoice.
Currency	Displays the currency for the **Invoice Amount** and **Balance** values.
	Select the Detail button to open the Invoice Summary page for an invoice.

Invoices Page (SFF)

Use the Invoice page to review invoices.

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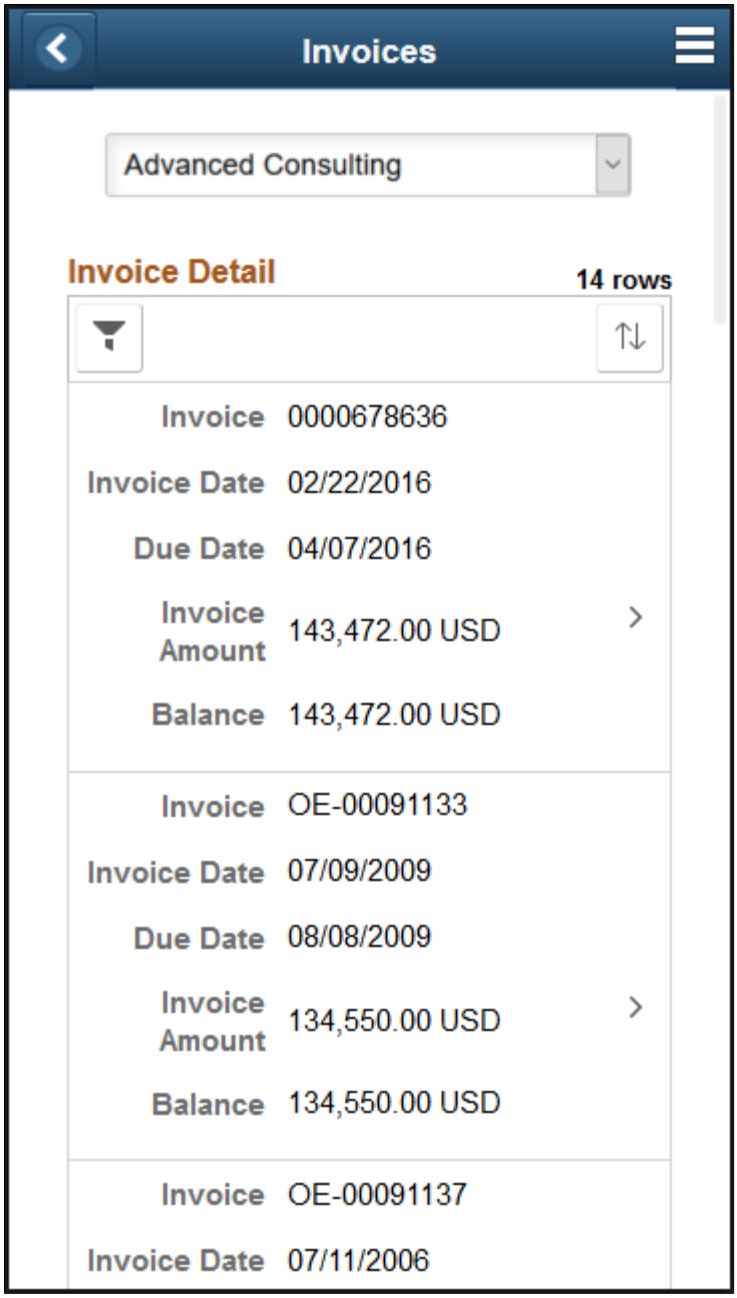
Note: Depending on biller settings, the invoices shown may not include all invoices for a customer. For example, the biller may choose to filter out the oldest invoices as of a certain date.

Navigation:

Select the Invoices tile on My Homepage in the customer portal.

This example illustrates the fields and controls on the Invoices page (SFF). You can find definitions for the fields and controls later on this page.



Invoice detail fields are the same as on the large form factor design. See Invoices Page (LFF).

Field or Control	*Description*
	Select the Sort Invoice Detail button in the small form factor design to sort invoices by the invoice fields, such as by invoice, invoice date, due date, invoice amount, and balance. If a sorting option is in use, the sort button is green.

Select an **Invoice** row to open the Invoice Summary page, where you can review additional invoice header information.

Invoices - Invoice Filters Page

Use the Invoice Filters page to

Navigation:

Select the Filters button on the Invoices page.

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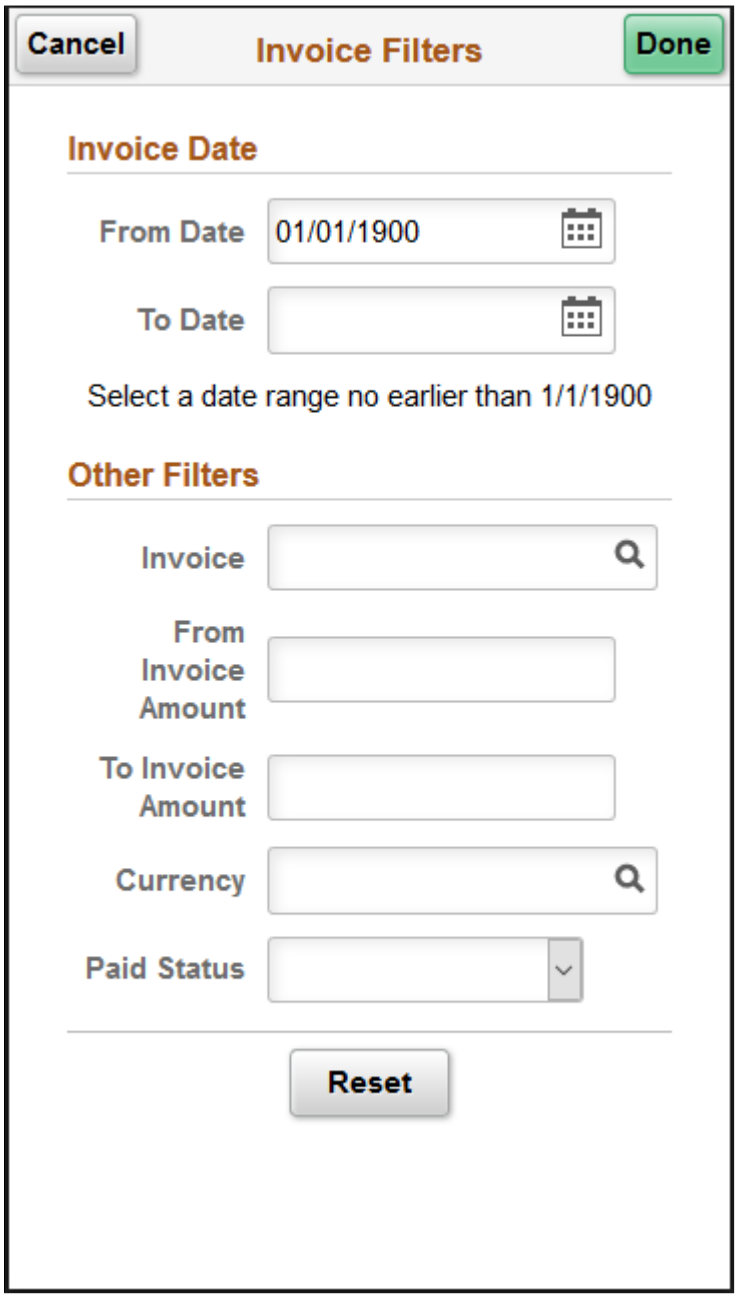
This example illustrates the fields and controls on the Invoice Filters page (SFF). You can find definitions for the fields and controls later on this page.



Invoice Date

Field or Control	*Description*
From Date	Enter a date or select a date from the calendar to display invoices that were generated on or after the specified date.

Field or Control	*Description*
To Date	Enter a date or select a date from the calendar to display invoices that were generated on or before the date specified.

Other Filters

Field or Control	*Description*
Invoice	Filter to display a specific invoice or enter a partial invoice number to display all possible values.
From Invoice Amount	Enter a minimum invoice amount. The system displays all invoices with total amounts that are greater than or equal to the amount that the customer specifies.
To Invoice Amount	Enter a maximum invoice amount. The system displays all invoices with total amounts that are less than or equal to the amount that a customer specifies.
Currency	Filter by invoice currency.
Paid Status	Select the payment status for the invoice. The available options are *Not Yet Paid/Applied* and *Paid/Applied*.

Invoice Summary Page (LFF)

Use the Invoice Summary page to view invoice header information.

Navigation:

Select the **Detail** button for an invoice on the Invoices page.

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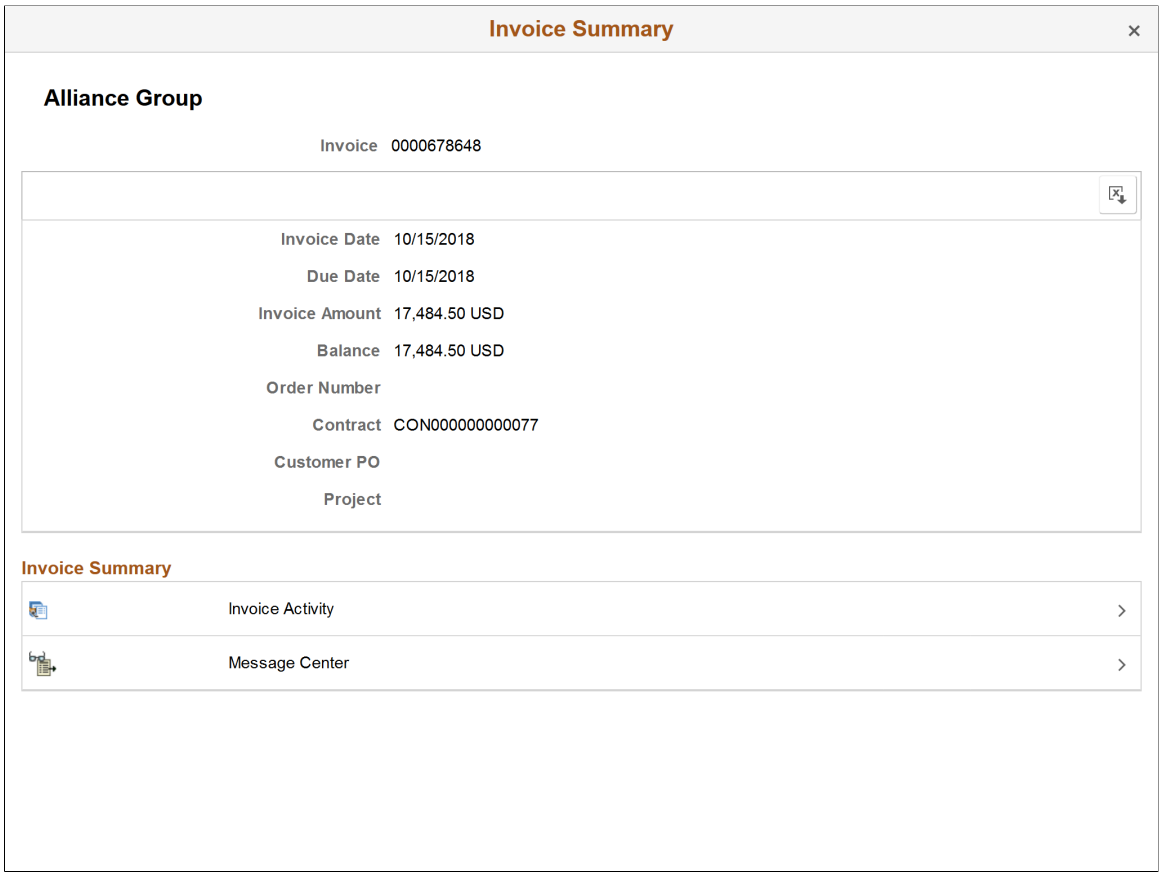
This example illustrates the fields and controls on the Invoice Summary page. You can find definitions for the fields and controls later on this page.



View the following information on the Invoice Summary page:

- Invoice
- Invoice Amount
- Invoice Date
- Balance
- Bill Status
- Due Date
- Order Number
- Customer PO
- Contract
- Project

Invoice Summary Page (SFF)

Use the Invoice Summary page to view invoice header information. Access invoice activity and the Message Center.

Navigation:

Select an **Invoice** row to open the Invoice Summary page, where you can review additional invoice header information.

View the following information on the Invoice Summary page:

- Invoice
- Invoice Date
- Due Date
- Invoice Amount
- Balance
- Order Number
- Contract
- Customer PO
- Project

Viewing Statements (Fluid)

This topic discusses how to view your statements in Fluid eBill Payment when you select the Statements tile. This tile and Statements page are only available in the large form factor (LFF) design.

This example illustrates the Statements tile.

Using the Statements page, you can do the following:

- View a list of statements.

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- View a printable statement image.

Page Used to View Statements

Page Name	*Definition Name*	*Usage*
Statements Page (LFF)	EB_STMT_FL	View a list of statements and access a printable statement image.

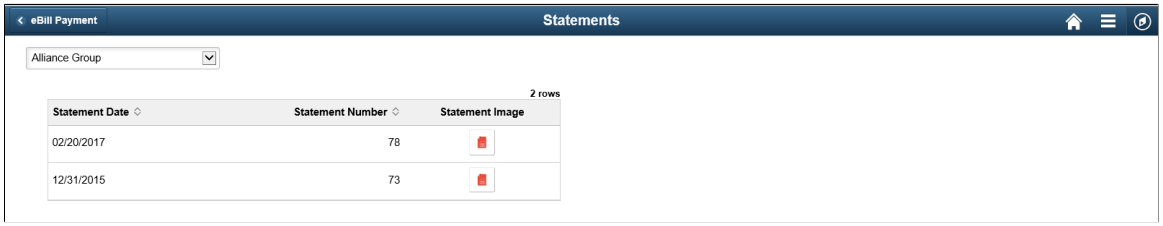
Statements Page (LFF)

Use the Statements page to view a list of statements and access a statement image.

Navigation:

Select the Statements tile on My Homepage.

This example illustrates the fields and controls on the Statements page. This page displays a list of statements and shows the statement date, statement number, and a link to the statement image. The Statements page is available in the large form factor design only.



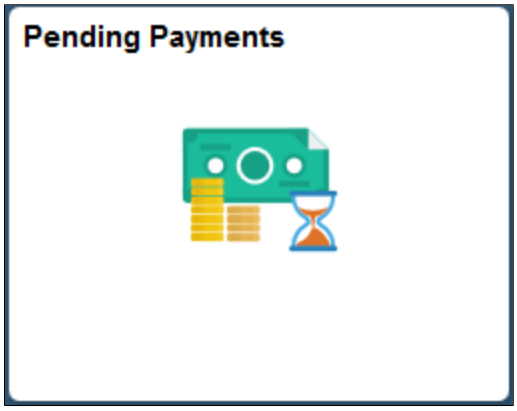
Field or Control	*Description*
Statement Date	Displays the statement date.
Statement Number	Displays the statement number.
	Select the attachments icon in the Statement Image column to open a PDF image of the statement in your browser. You can print the statement from the browser.

Statements are displayed only for the customer defined with the *Invoice To* option in customer setup and *View Statement* selected on the Self Service Security tab.

Reviewing Pending Payments (Fluid)

This topic discusses the payment information you can review in Fluid eBill Payment when you select the Pending Payments tile. This tile and related pages are only available in the large form factor (LFF) design.

This example illustrates the Pending Payments tile.



Using the Pending Payments pages, you can do the following:

- View pending and scheduled payments.
- Filter pending payments to narrow the results in the list of pending payments.
- View messages associated with payments.
- Remove scheduled payments (direct debit payment method only).

Pages Used to Review Pending Payments

Page Name	*Definition Name*	*Usage*
Pending Payments Page (LFF)	EB_PND_PAY_FL	Review invoices submitted for payment through eBill Payment and pending processing in Receivables.
Pending Payments - Filters Page	EB_PND_PAY_FIL_SCF	Narrow the results in the pending payments list by the available parameters, including invoice due date, ID, type, payment method, balance, status, and others.
Pending Payment Detail Page (LFF)	EB_PNDPYMT_DET_SCF	Review payment detail information.

Pending Payments Page (LFF)

Use the Pending Payments page to review invoices submitted for payment through eBill Payment and pending processing in Receivables.

Navigation:

Select the Pending Payments tile on My Homepage.

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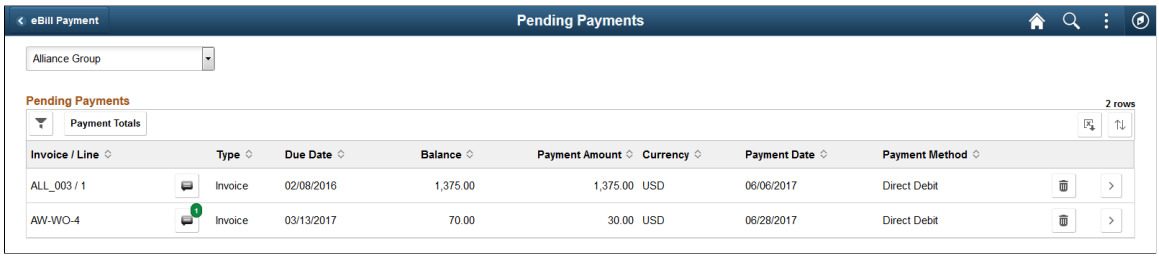
This example illustrates the fields and controls on the Pending Payments page (LFF). You can find definitions for the fields and controls later on this page.



The Pending Payments page lists invoices, including the invoice type, due date, remaining balance, payment amount and currency, payment date, and payment method.

Field or Control	***Description***
(Filter Items)	Select the Filter Items button to open the Filter page, where you can narrow the results you see on the Pending Payments list page, as you would using a search page.
Payment Totals (Show Payments)	Click this button to open the Payment Amounts by Currency page (EB_PNDPYMT_TOT_SCF) where you can view the pending invoice totals for each currency and date combination.
(Messages)	Select the Messages button to open the Message Center, where you can view messages regarding this invoice. The number of messages appears on the button when messages exist.
	Select the Delete button to remove a scheduled payment. This button is available only when the payment method is Direct Debit. If an invoice is removed from the pending page, it becomes available again to pay.
	Select the Detail button to view payment detail for the selected payment.

Pending Payments - Filters Page

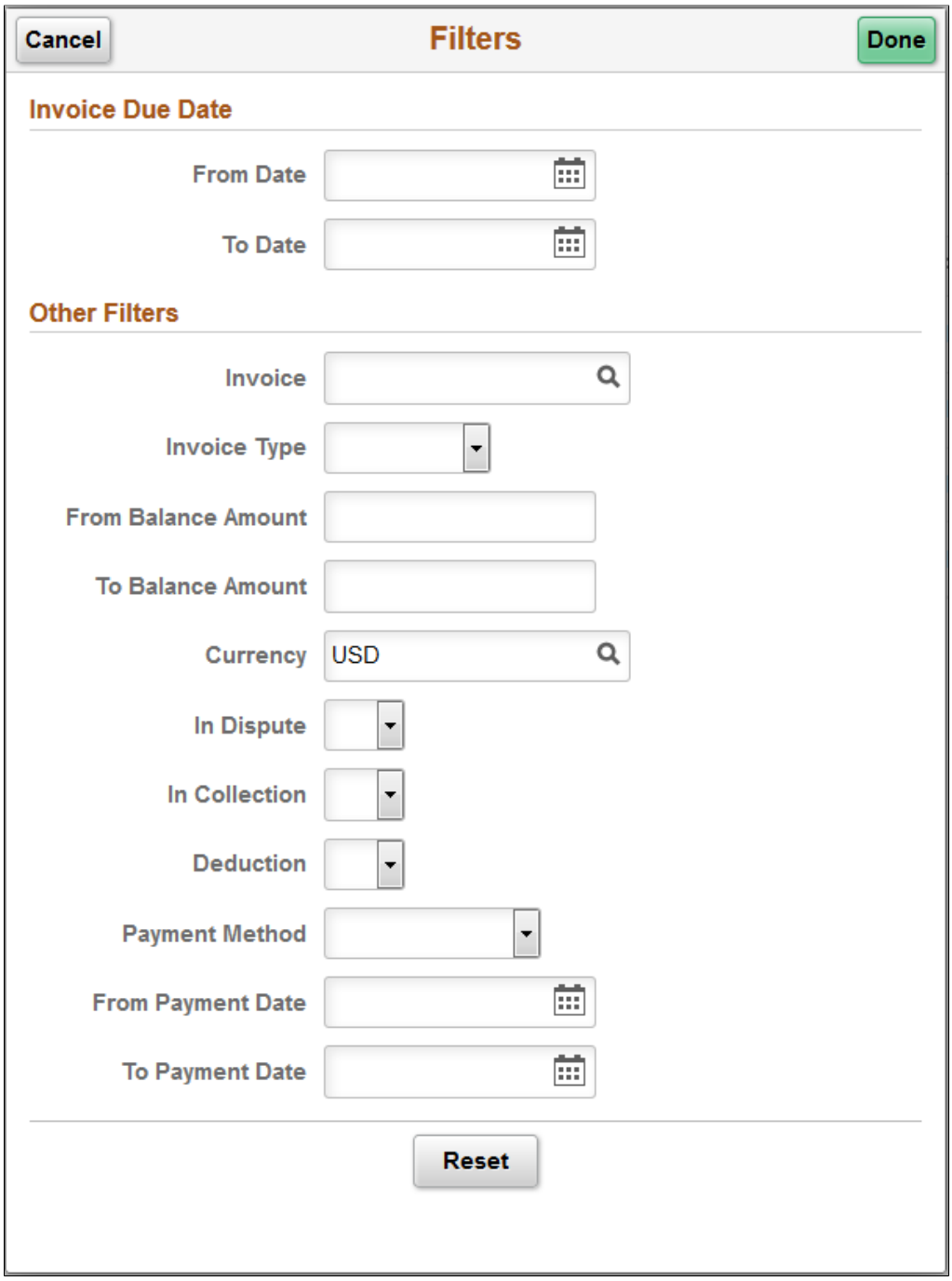
Use the Pending Payments – Filters Page to narrow the results in the pending payments list by the available parameters, including invoice due date, ID, type, payment method, balance, status, and others.

Filter fields are the same on both large and small form factor designs.

Navigation:

Select the **Filter Items** button on the Pending Payments page.

This example illustrates the fields and controls on the Pending Payments - Filters page (LFF). You can find definitions for the fields and controls later on this page.



Invoice Due Date

Field or Control	*Description*
From Date	Enter a date or select a date from the calendar to display all invoice due dates that are on or after the specified date.

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Field or Control	*Description*
To Date	Enter a date or select a date from the calendar to display all invoice due dates that are on or before the date specified.

Other Filters

Field or Control	*Description*
Invoice	Filter to display a specific invoice or enter a partial invoice number to display all possible values.
Invoice Type	Show only the selected invoice type. Select from these options: • *CreditMemo* • *DebitMemo* • *Invoice* • *Overdue*
From Balance Amount	Enter a minimum balance amount. The system displays all pending payments with total amounts that are greater than or equal to the amount that the customer specifies.
To Balance Amount	Enter a maximum balance amount. The system displays all pending payments with total amounts that are less than or equal to the amount that a customer specifies.
Currency	Filter by invoice currency.
In Dispute	Select *Yes* to include or *No* to exclude pending payments for invoices in dispute.
In Collection	Select *Yes* to include or *No* to exclude pending payments for invoices in collection.
Deduction	Select *Yes* to include or *No* to exclude pending payments for invoices that are designated as deductions.

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Field or Control	*Description*
Payment Method	Show only pending payments with the selected payment method. Select from the options set up by the biller: • *Credit Card* • *Direct Debit* • *Electronic Check* • *PayPal*

Pending Payment Detail Page (LFF)

Use the Pending Payment Detail page to review payment detail information.

Navigation:

Select the **Detail** button for an invoice or line.

This example illustrates the fields and controls on the Pending Payment Detail page (LFF). You can find definitions for the fields and controls later on this page.

The detail shown for a pending payment includes the following:

- Invoice or line ID
- Balance amount of the invoice or line
- Amount of the pending payment
- Payment date
- Invoice type
- Payment method

Values for these details are shown if applicable:

- Dispute reason
- Collection code
- Deduction reason

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- Partial Pay Reason

Reviewing Payment History (Fluid)

This topic discusses the payment information you can review in Fluid eBill Payment when you select the Payment History tile. This tile and related pages are only available in the large form factor (LFF) design.

This example illustrates the Payment History tile.

Using the Payment History pages, you can do the following:

- Verify that a payment or payments have been applied to an invoice.
- Filter payment information to narrow the results in the payment history list.
- View payment details for a selected payment.

Pages Used to Review Payment History

Page Name	*Definition Name*	*Usage*
Payment History Page (LFF)	EB_PAY_HIS_FL	Review payments processed in Receivables.
Payment History - Filters Page	EB_PAY_HIS_FIL_SCF	Search for payments and sort results.
Payment History - Payment Detail Page (LFF)	EB_PAY_HIS_DET_SCF	Review payment details for payments that have been processed in Receivables.

Payment History Page (LFF)

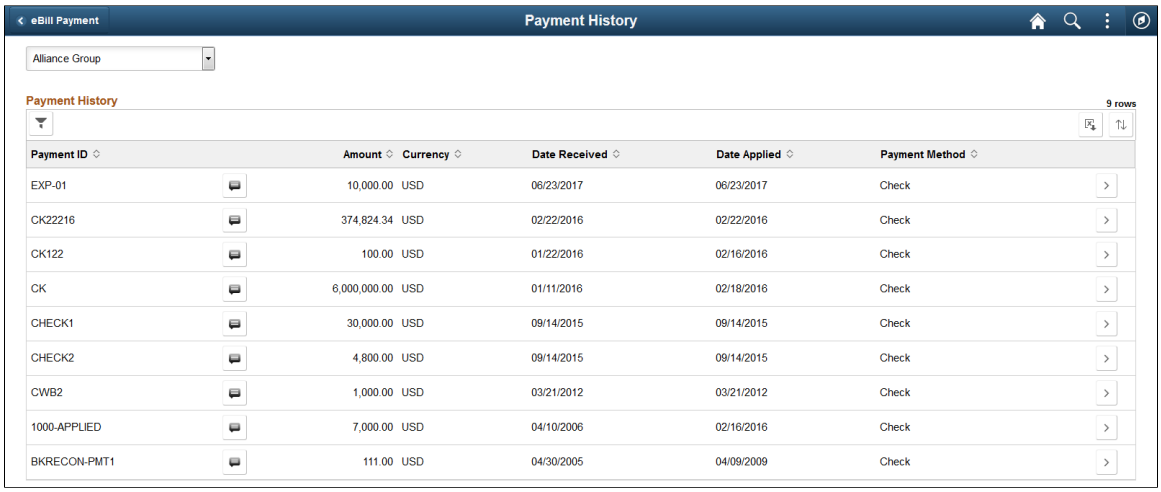
Use the Payment History page to review payments processed in Receivables.

This page is only available in the large form factor design.

Navigation:

Select the Payment History tile on My Homepage in the customer portal.

This example illustrates the fields and controls on the Payment History page (LFF). You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
	Select the Filter Items button to open the Filter page, where you can narrow the results you see on the Payment History list page, as you would using a search page.
Payment ID	Identifies the payment.
	Select the Messages button to open the Message Center, where you can view messages regarding this payment. The number of messages appears on the button when messages exist.
Amount and **Currency**	Displays the amount and currency of the payment received.
Date Received	Displays the date the user made the payment in Fluid eBill Payment.
Date Applied	Displays the date the payment was applied to the invoice. This field is blank until the system processes the payments in eBill and applies them to the invoices.
Payment Method	Displays the method used to make the payment.
	Select the Detail button to view payment detail for the selected payment.

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Payment History - Filters Page

Use the Filters page to search for payments and sort results.

Navigation:

Select the **Filter Items** button on the Payment History page.

You can filter payments in the Payment History list by date range, amount range, payment method, currency, and payment ID.

Payment Date

Payment date values filter payments by the **Date Received**.

Field or Control	*Description*
From Date	Enter a date or select a date on the calendar to display all payments received on or after the specified date.
To Date	Enter a date or select a date on the calendar to display all payments received on or before the date specified.

Other Filters

Field or Control	*Description*
Payment ID	Enter a payment identification number, for example, a check number.
Payment Method	Filter by the selected payment method.
From Amount	Enter a minimum payment amount. The system displays all payments with amounts that are greater than or equal to the amount that the user specifies.
To Amount	Enter a maximum payment amount. The system displays all payments with amounts that are less than or equal to the amount that a user specifies.
Currency	Filter by payment currency.

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Payment History - Payment Detail Page (LFF)

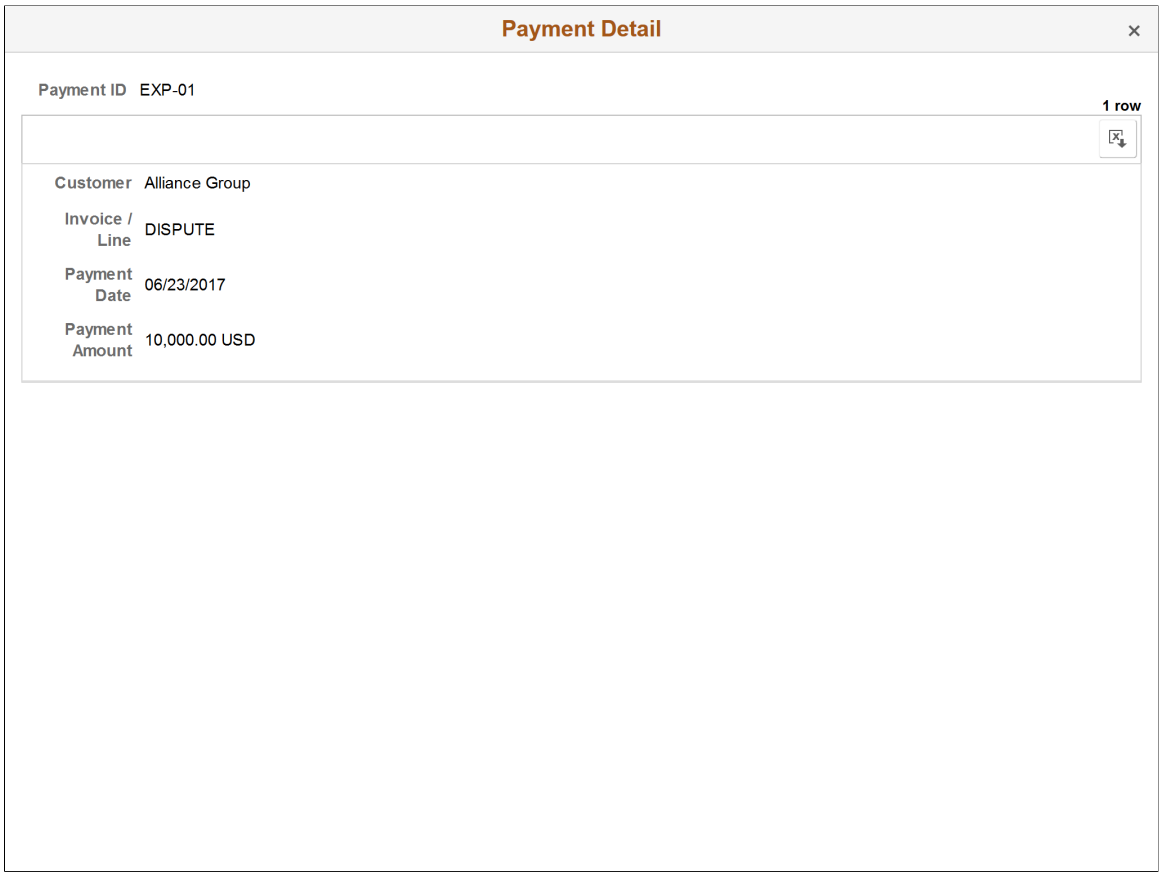
Use the Payment History - Payment Detail page to review payment details for payments that have been processed in Receivables.

This page is only available in the large form factor design.

Navigation:

Select the **Detail** button for a payment.

This example illustrates the fields and controls on the Payment History - Payment Detail page.



The detail shown for a payment in the payment history list includes the following:

Field or Control	*Description*
Payment ID	Displays a payment identification number, for example, a check number.
Payment Amount	Displays the payment amount submitted through eBill and the payment currency.
Date Received	Displays the date the user made the payment in eBill.

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Field or Control	*Description*
Date Applied	Displays the date the payment was applied to the invoice. This field is blank until the system processes the payments in eBill and applies them to the invoices.
Payment Method	Displays the method used to make the payment.
Credit Card Type and **Last Four Digits**	Displays the type of credit card and the last four digits of the credit card number if the payment method is credit card.

Payment Activity

Field or Control	*Description*
Customer Name	Displays the payee customer name.
Invoice / Line	Displays the invoice number, and line number if applicable, against which the payment was made.
Activity Type	Displays the type of activity associated with the invoice.
Amount and **Currency**	Displays the payment amount and currency.

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Chapter 10

Making Payments Using Fluid eBill Payment

Using Quick Pay

This topic discusses how to make a payment using Quick Pay in Fluid eBill Payment.

Using Quick Pay, you can pay the balance for one currency using a single page, bypassing the Payment Cart entirely.

This example illustrates the fields and controls on the Quick Pay tile.

The Quick Pay tile and pages look the same in both small form factor (SFF) and large form factor (LFF) designs, with the exception of size.

Pages Used to Make a Payment With Quick Pay

Page Name	*Definition Name*	*Usage*
Quick Pay Page (LFF and SFF)	EB_QUICK_PAY_FL	Initiate the payment process for the payment amount, date, and method shown.
Quick Pay - Balances by Currency Page (LFF and SFF)	EB_QUICK_PAY_FL	Review payment amounts by currency. Select one currency to pay at a time.
Quick Pay - Change Card Page (LFF and SFF)	EB_QKCART_CARD_SCF	Select a different credit card or add a new credit card before submitting payment.

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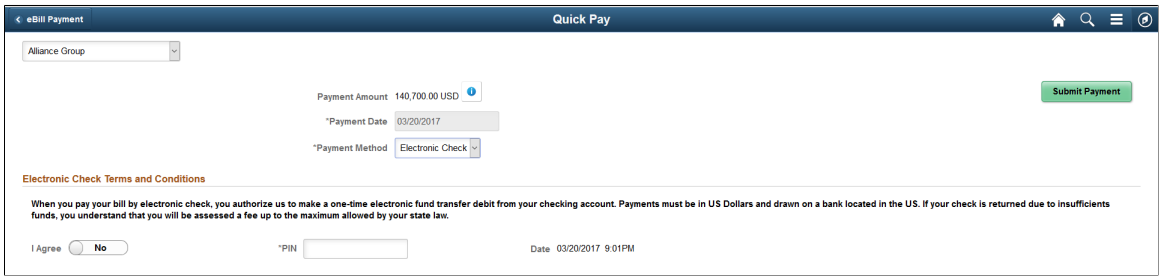
Quick Pay Page (LFF and SFF)

Use the Quick Pay page to initiate the payment process for the payment amount, date, and method shown.

Navigation:

Select the Quick Pay tile on My Homepage. This page appears when the customer's total balance is comprised of one currency.

This example illustrates the fields and controls on the Quick Pay page (LFF) for a customer paying their USD balance by electronic check. The fields and controls are the same on the small form factor design; only the layout is different.



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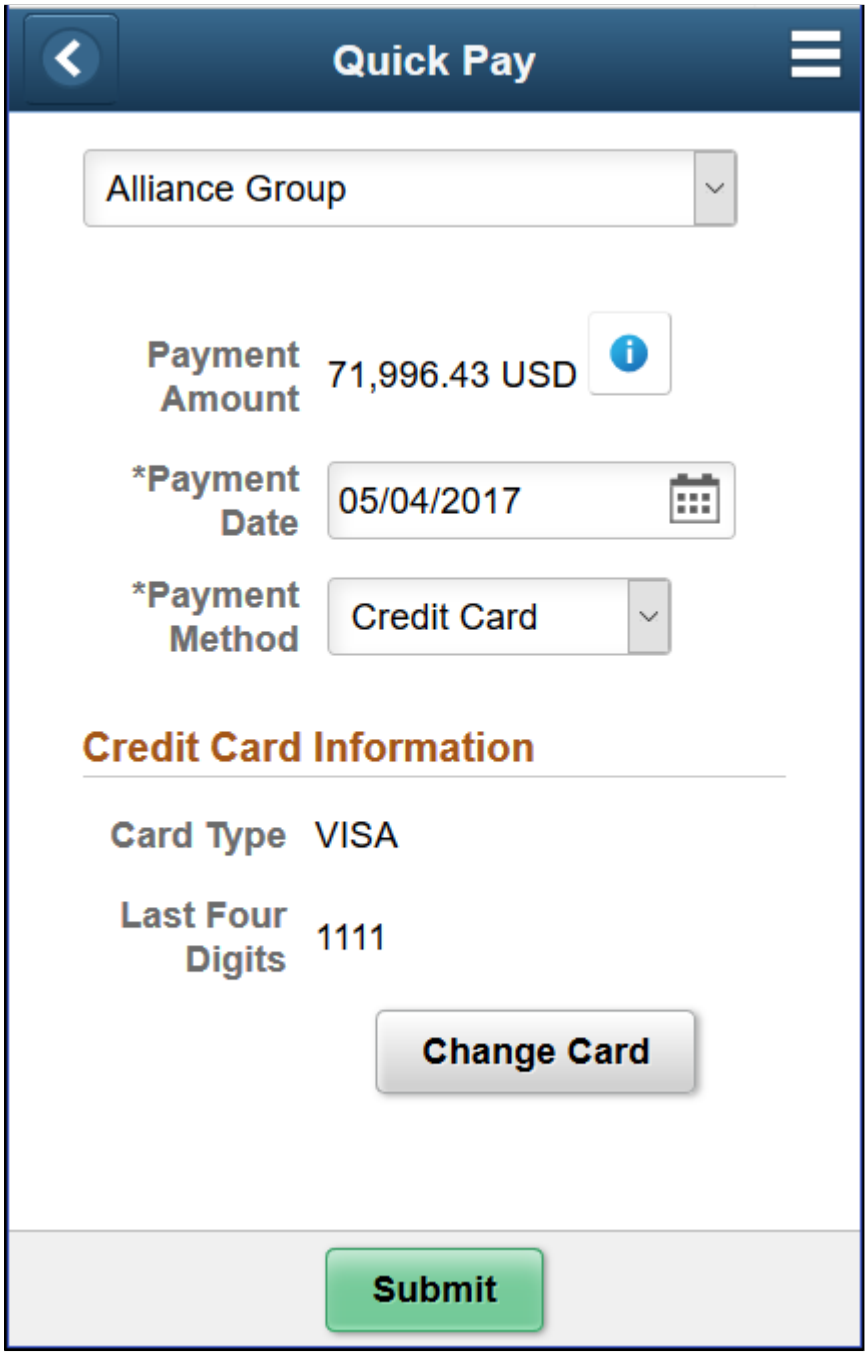
This example illustrates the fields and controls on the Quick Pay page (SFF) for a customer paying their euros balance using a credit card. The fields and controls are the same on the large form factor design; only the layout is different.



The customer drop-down list enables brokers or users representing multiple customers to view data based on the selected customer.

Field or Control	*Description*
	Select this button to review explanatory text about the payment amount. The text refers to this documentation for details. The Information button on the Payment Amount field in Quick Pay alerts the user that the payment amount may not reflect the total balance due. Some invoices are excluded from the amount if they are not eligible for payment. The payment amount may exclude the following types of invoices, depending on how your account profile is established and the selected payment method: • Credit invoices. • Past due invoices. • Invoices in dispute or collection. • Invoices already included in a pending payment with a different payment method.
Payment Date	Enter a date for the payment. The earliest payment date allowed is the current date plus lead time. The selected date must be a business day.
Payment Method	Select from available payment methods. Depending on the eBill Payment system you are using and customer setup, you can select from: • *Credit Card* • *Direct Debit* • *Electronic Check* • *PayPal*
Credit Card Information	Displays the credit card type and last four digits of the credit card number used to make the payment when *Credit Card* is the payment method. The primary credit card for the customer is used by default.
Change Card	Select this button to access the Change Card page, where you can select another card on file or add a new credit card before submitting payment.
Direct Debit Information	Displays the payment date, beneficiary bank, and last four digits of the bank account number when *Direct Debit* is the payment method.

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Field or Control	*Description*
Electronic Check Terms and Conditions	Select *Yes* to agree to the terms and conditions when *Electronic Check* is the payment method. You may also be required to enter a personal identification number (PIN) depending on setup for electronic check in the eBill Payment system you are using.
Submit	Select this button to initiate payment. The system sends payment data to the third-party payment processing host for credit card, electronic check, and PayPal payment methods.

Quick Pay - Balances by Currency Page (LFF and SFF)

Use the Quick Pay - Balances by Currency page to review payment amounts by currency. Select one currency to pay at a time.

Navigation:

Select the Quick Pay tile on My Homepage. This page appears when the customer's total balance is comprised of invoices in multiple currencies.

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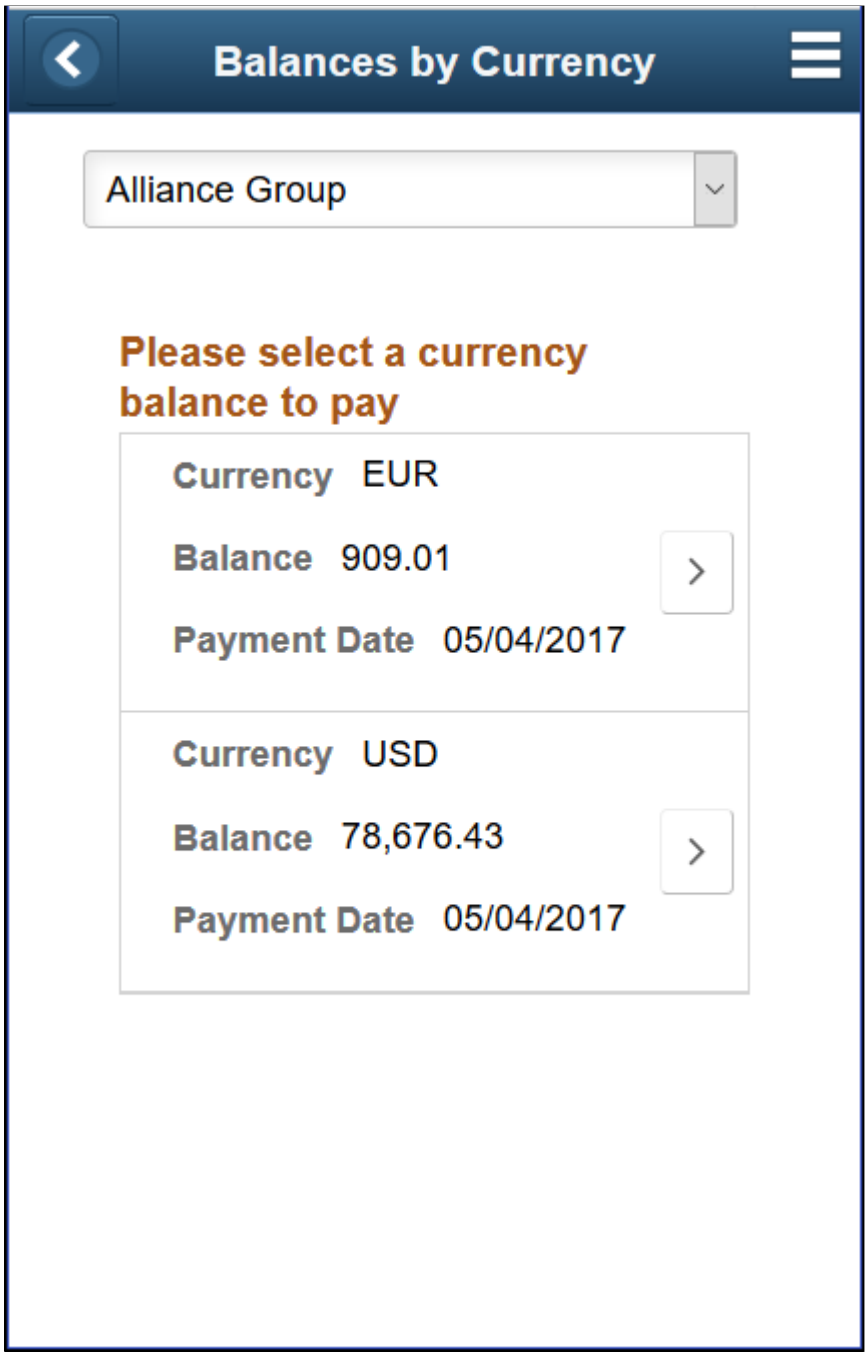
This example illustrates the fields and controls on the Quick Pay - Balances by Currency page (SFF). The fields and controls are the same on the large form factor design; only the layout is different.



Field or Control	*Description*
(More)	Select the **More** button for a currency balance to proceed to the Quick Pay page, where you can submit a payment.

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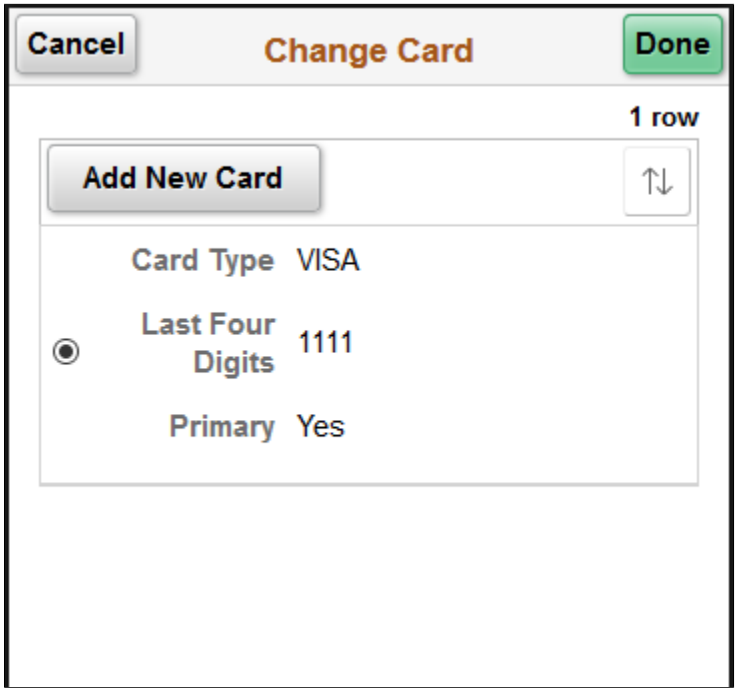
Quick Pay - Change Card Page (LFF and SFF)

Use the Quick Pay - Change Card page to select a different credit card or add a new credit card before submitting payment.

Navigation:

Select the **Change Card** button on the Quick Pay page.

This example illustrates the fields and controls on the Quick Pay - Change Card page (SFF). The fields and controls are the same on the large form factor design; only the layout is different.



Field or Control	*Description*
Add New Card	Select to add a new credit card before submitting payment. The PeopleSoft system transfers the user to the third-party credit card host's website, where the user enters credit card information.

Making a Payment (Fluid)

This topic discusses how to make a payment using the Make a Payment tile in Fluid eBill Payment.

This example illustrates the fields and controls on the Make a Payment Tile.

Using the Make a Payment pages in the large form factor (LFF) and small form factor (SFF) designs, you can do the following:

- Pay your total account balance.
- Pay your past due balance.
- Select one or more invoices to pay.
- Pay invoice total for your most recent statement (only in the large form factor design).

Pages Used to Make a Payment

Page Name	*Definition Name*	*Usage*
Make a Payment Page (LFF)	EB_MAKE_PAY_FL	Pay by total balance, past due balance, selected invoices, or most recent statement.
Make a Payment Page (SFF)	EB_MAKE_PAY_FL	Pay by total balance, past due balance, or selected invoices.
Invoice Balances Page (LFF)	EB_INVOICES_FL	View invoice balances that comprise the total balance on the account, or view invoices that are past due. Select and pay invoices.
Invoice Balances Page (SFF)	EB_INV_LIST_SCF	View invoice balances that comprise the total balance on the account, or view invoices that are past due.
Select Invoice(s) - Invoice Balances Page (SFF)	EB_SM_INVC_LST_FL	Select and pay invoices.

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Page Name	*Definition Name*	*Usage*
Invoice Filters Page	INVOICE_FILTER_FL	Narrow the invoices in the list by the available parameters, including invoice date, invoice ID, invoice status, entry type, invoice amount, collection status, and others.

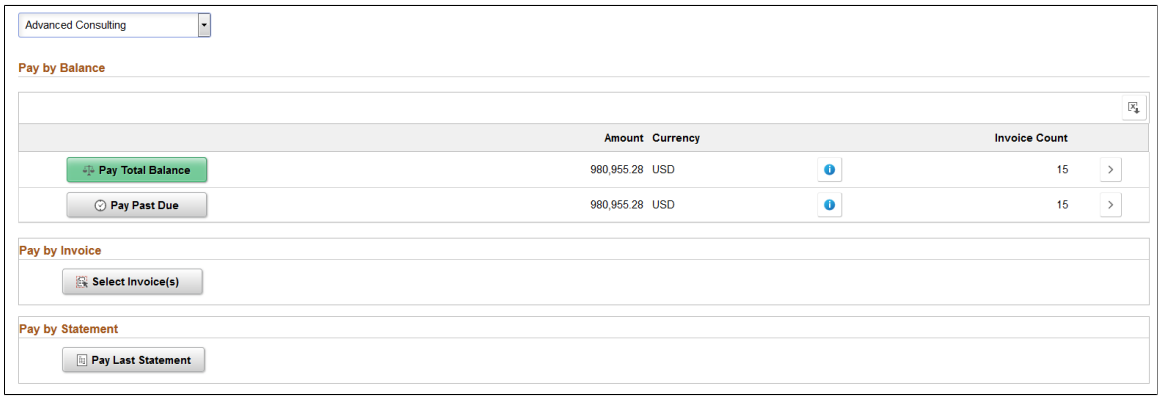
Make a Payment Page (LFF)

Use the Make a Payment page to pay by total balance, past due balance, selected invoices, or most recent statement.

Navigation:

Select the Make a Payment tile on My Homepage in the customer portal.

This example illustrates the fields and controls on the Make a Payment page (LFF). You can find definitions for the fields and controls later on this page.



The customer drop-down list enables brokers or users representing multiple customers to view data based on the selected customer.

Pay by Balance

Field or Control	*Description*
Pay Total Balance	Click the **Pay Total Balance** button to add invoices comprising the total account balance to the Payment Cart. This action replaces any invoices currently in the Payment Cart. The **Amount** shows the total balance amount, which is shown in the preferred display currency. The **Invoice Count** field shows the number of open invoices included in the total balance.

Field or Control	*Description*
Pay Past Due	Click the **Pay Past Due** button to add invoices comprising the account's past due balance to the Payment Cart. This action replaces any invoices currently in the Payment Cart. The **Amount** shows the past due balance amount, which is shown in the preferred display currency. The **Invoice Count** field shows the number of open invoices included in the past due balance.
	Select this button to review explanatory text only in the large form factor design.
	Select the View button to open the Invoice Balances page, where you can review invoices and pay selected invoices, if desired. See Invoice Balances Page (LFF).

Pay by Invoice

Field or Control	*Description*
Select Invoice(s)	Click the **Select Invoice(s)** button to open the Invoice Balances page, where you can select one or more invoices to add to the Payment Cart.

Pay by Statement

This option is available only in the large form factor design.

Field or Control	*Description*
Pay Last Statement	Click the **Pay Last Statement** button to add invoices comprising the most recent statement. This action replaces any invoices currently in the Payment Cart.

Make a Payment Page (SFF)

Use the Make a Payment page to pay by total balance, past due balance, or selected invoices.

Navigation:

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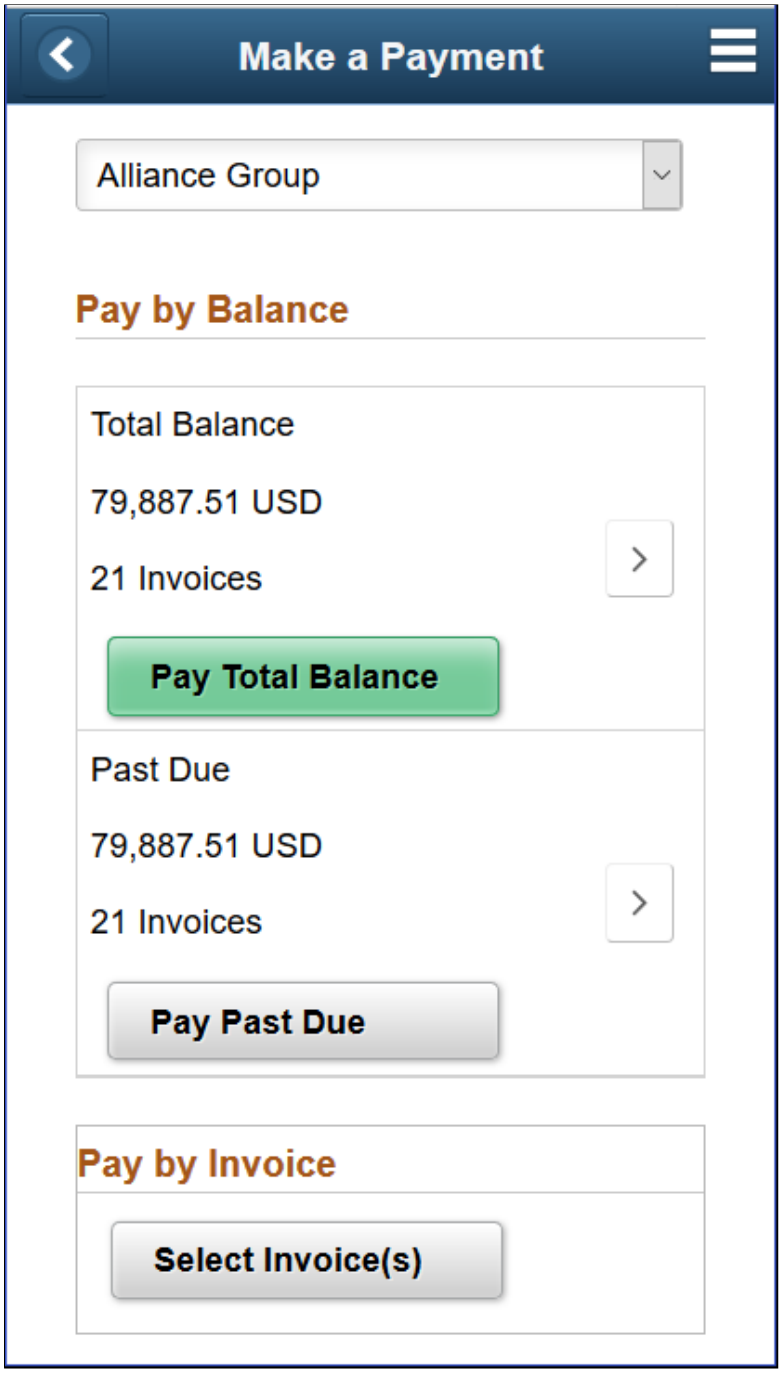
Select the Make a Payment tile on My Homepage in the customer portal.

This example illustrates the fields and controls on the Make a Payment page (SFF). You can find definitions for the fields and controls later on this page.



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Pay by Balance

Field or Control	*Description*
Pay Total Balance	Click the **Pay Total Balance** button to add invoices comprising the total account balance to the Payment Cart. This action replaces any invoices currently in the Payment Cart. The row shows the total balance amount, which is shown in the preferred display currency and the number of open invoices included in the total balance.
Pay Past Due	Click the **Pay Past Due** button to add invoices comprising the account's past due balance to the Payment Cart. This action replaces any invoices currently in the Payment Cart. The row shows the total balance amount, which is shown in the preferred display currency and the number of open invoices included in the past due balance.
	Select the View button to open the Invoice Balances page, where you can view invoice header and line details.

Pay by Invoice

Field or Control	*Description*
Select Invoice(s)	Click the **Select Invoice(s)** button to open the Invoice Balances Page (LFF), where you can select one or more invoices to add to the Payment Cart.

Invoice Balances Page (LFF)

Use the Invoice Balances page to select and pay invoices.

View invoice balances that comprise the total balance on the account, or view invoices that are past due.

Navigation:

Click the **Select Invoice(s)** button on the Make a Payment page.

Click the View button for the **Total Balance** row on the Make a Payment page to view invoice balances that comprise the total balance.

Click the View button for the **Past Due** row on the Make a Payment page to view invoices that are past due.

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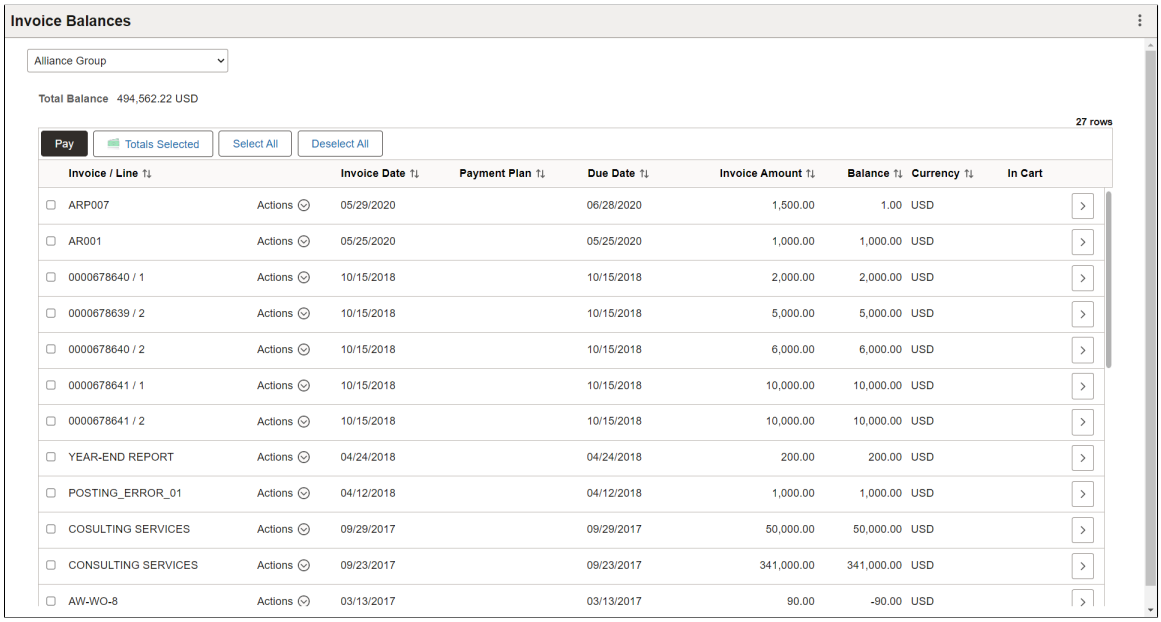
This example illustrates the fields and controls on the Invoice Balances page when accessed by clicking the Total Balance row on the Make a Payment page. You can find definitions for the fields and controls later on this page.



The fields on the Total Balance - Invoice Balances page and the Past Due – Invoice Balances page are the same.

Field or Control	***Description***
Total Balance	Shows the total balance on the account in your preferred display currency. Define the preferred display currency on the My Preferences page.
Pay (Pay this Bill)	Select invoices to add to the Payment Cart first, then click the Pay button to proceed to the Payment Cart.
Totals Selected	Appears when the account contains invoices with multiple currencies. Click the Totals Selected button to view the number of invoices selected and the payment amount for each currency.
Invoice / Line	Displays the invoice or line identification number. Select an invoice or line to view the Invoice Summary page. If you select the **Allow Change of Payment Method** check box on the “eBill – General Page” (Application Fundamentals), you can select direct debit invoices and change the payment method while making the payment.

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Field or Control	*Description*
Actions	Click to open a list of available actions. Select from the following options: • *Invoice Details* - Select to open the Invoice Details page (EB_INVOICE_DTL_SCF) showing line item details for the invoice. • *Message Center* - Select to review messages associated with the invoice. • *Invoice Activity* - Select to open the Invoice Activity page (EB_INVOICE_ACV_SCF) for the invoice. • *Email Invoice* - Select to open the Email Invoice Copy page (EMAIL_INVOICES_FL) to send a copy of the invoice by email.
Invoice Date	Displays the date of the invoice.
Due Date	Displays the due date of the invoice.
Invoice Amount and **Balance**	Displays the invoice amount and the balance remaining on the invoice.
Currency	Displays the invoice currency.
	Indicates that the invoice is already in the Payment Cart.
	Select the Detail button to open the Invoice Summary page for an invoice.

Select Invoice(s) - Invoice Balances Page (SFF)

Use the Invoice Balances page to select and pay invoices.

Navigation:

Click the **Select Invoice(s)** button on the Make a Payment page.

Field or Control	*Description*

Details for each invoice are the same as on the large form factor design. See Invoice Balances Page (LFF).

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Select an **Invoice / Line** row to open the Invoice Summary page, where you can review additional invoice and line header details.

Invoice Balances Page (SFF)

Use the Invoice Balances page to view invoice balances that comprise the total balance on the account, or view invoices that are past due.

Navigation:

Click the View button for the **Total Balance** row on the Make a Payment page to view invoice balances that comprise the total balance.

Click the View button for the **Past Due** row on the Make a Payment page to view invoices that are past due.

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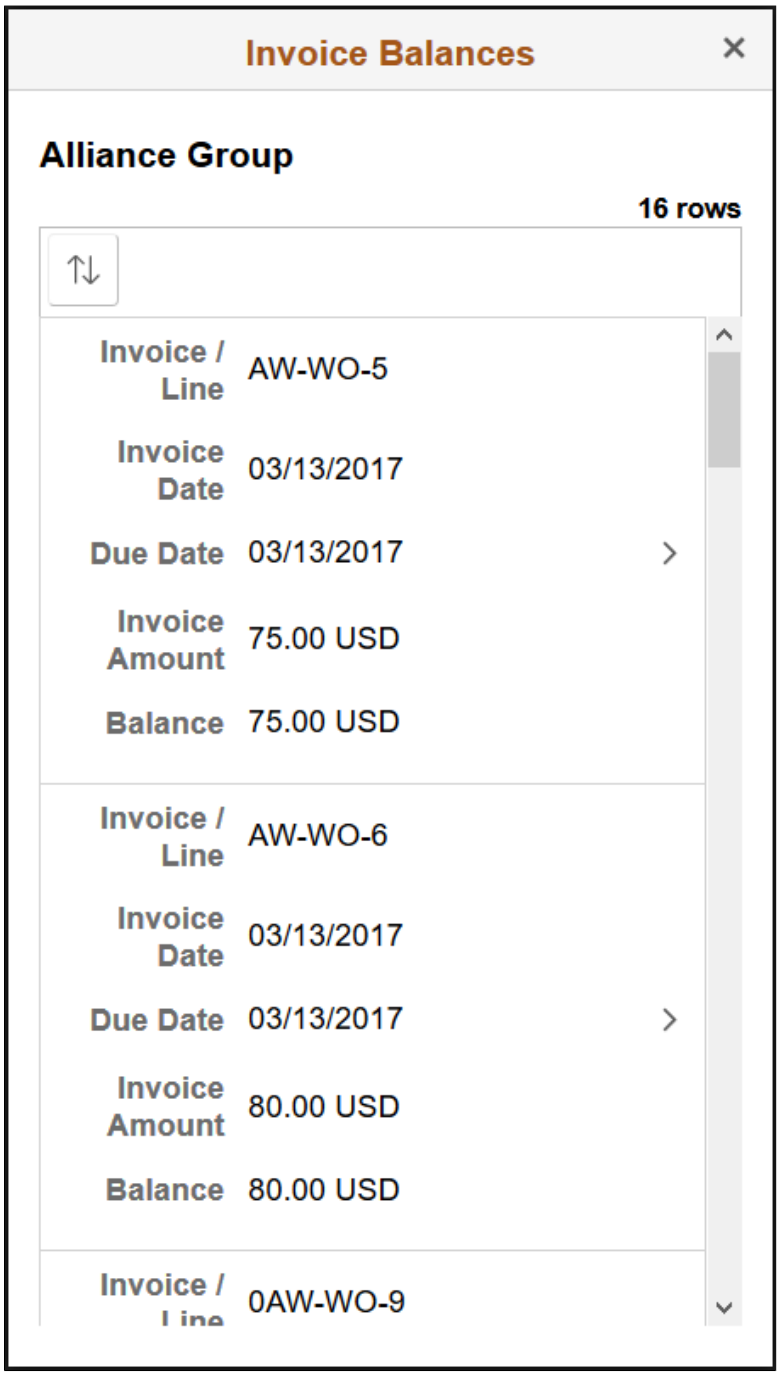
This example illustrates the fields and controls on the Invoice Balances page (SFF) when accessed from the Make a Payment page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
	Select the Sort Invoice Detail button in the small form factor design to sort invoices by the invoice fields, such as by invoice/line, invoice date, due date, invoice amount, and balance. If a sorting option is in use, the sort button is green.

Details for each invoice are the same as on the large form factor design. See Invoice Balances Page (LFF).

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Select an **Invoice / Line** row to review additional invoice and line header details.

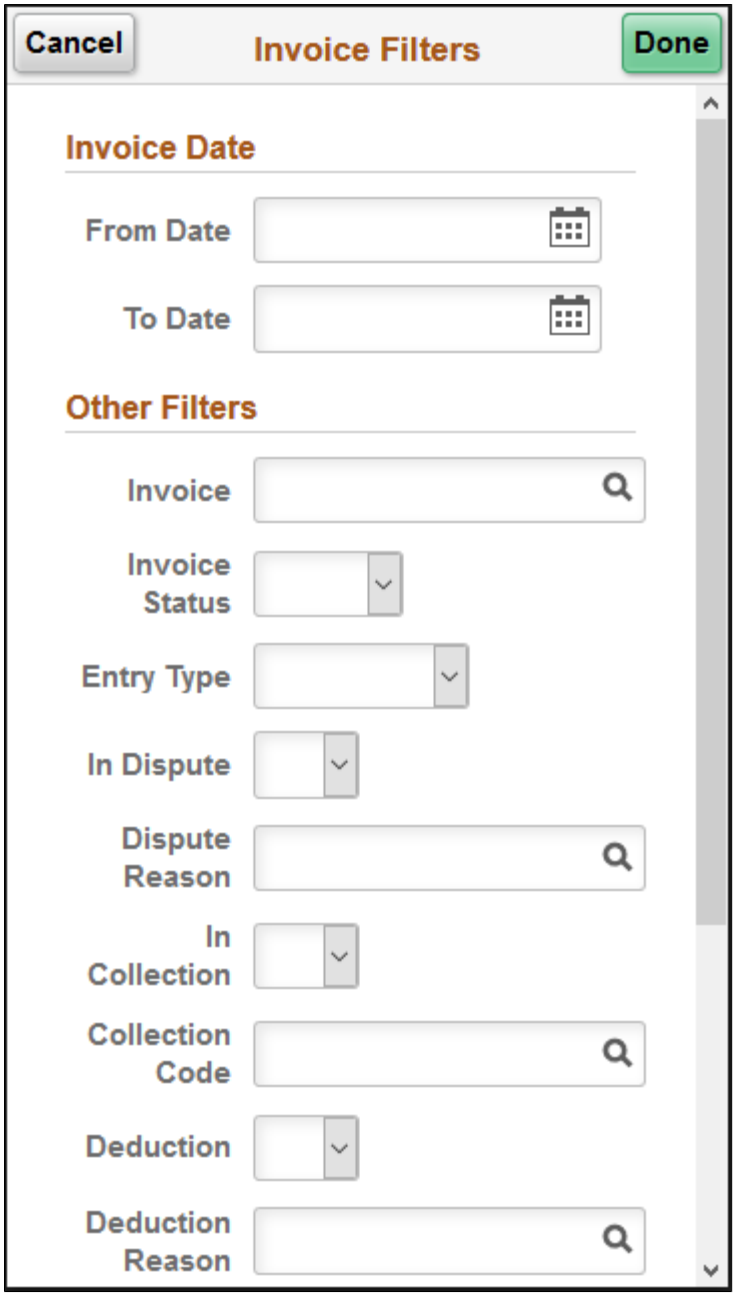
Invoice Filters Page

Use the Invoice Filters page to narrow the invoices in the list by the available parameters, including invoice date, invoice ID, invoice status, entry type, invoice amount, collection status, and others.

Navigation:

Select the Filters button on the Invoice Balances page when accessed through the **Select Invoice(s)** button.

This example illustrates the fields and controls on the Invoice Balances - Invoice Filters page (SFF). You can find definitions for the fields and controls later on this page.



Invoice Date

Field or Control	*Description*
From Date	Enter a date or select a date from the calendar to display all invoice dates that are on or after the specified date.
To Date	Enter a date or select a date from the calendar to display all invoice dates that are on or before the date specified.

Other Filters

Other filters include the following:

- **Invoice**
- **Invoice Status** (*<blank>*, *Open*, or *Closed*)
- **Entry Type** (*<blank>*, *CreditMemo*, *DebitMemo*, *Invoice*, or *Overdue*)
- **In Dispute**
- **Dispute Reason**
- **In Collection**
- **Collection Code**
- **Deduction**
- **Deduction Reason**
- **From Invoice Amount**
- **To Invoice Amount**
- **Currency**

Understanding the Payment Cart in Fluid eBill Payment

The Payment Cart in Fluid eBill Payment uses the Activity Guide framework to guide users through the online payment process. Activity guides are a PeopleTools feature that allows businesses to define guided procedures for a user or group of users to complete. Users are presented with a list of actions, or tasks, that need to be completed to finish the procedure. For more technical information about activity guides, see the product documentation for *PeopleTools: Portal Technology*.

The steps in the online payment activity change dynamically depending on the payment method that you select in Fluid eBill Payment.

- *Credit Card*

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  - Step 1 of 3: Invoices to Pay
  - Step 2 of 3: Payment Details
  - Step 3 of 3: Review and Submit

- *Direct Debit*
  - Step 1 of 2: Invoices to Pay
  - Step 2 of 2: Review and Submit

- *Electronic Check*
  - Step 1 of 2: Invoices to Pay
  - Step 2 of 2: Review and Submit

- *PayPal*
  - Step 1 of 2: Invoices to Pay
  - Step 2 of 2: Review and Submit

The system validates the contents of the Payment Cart during the first step and identifies invoices that contain errors. Errors must be corrected before continuing to the next step. However, if the Payment Cart is empty then the system will automatically redirect user to the Make a Payment Fluid page.

You can navigate between steps and view payment details at each step. After a user submits payment, a payment results page appears for all payment methods. You can navigate back to the first step in the Payment Cart or go to your Fluid homepage.

Using the Payment Cart in Fluid eBill Payment

This topic discusses the common pages used in the Payment Cart in Fluid eBill Payment.

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This example illustrates the fields and controls on the Payment Cart Tile.

The tile looks the same in both small form factor (SFF) and large form factor (LFF) designs, with the exception of size. The tile displays the number of invoices currently in the Payment Cart.

Pages Used in the Payment Cart

These pages are used in the Payment Cart in the large form factor design (LFF), such as on laptops and desktops.

Page Name – LFF	***Definition Name***	***Usage***
Invoices to Pay Page	EB_PAYCART_AGS1_FL	Select a payment method and change payment amount and date.
Partial Payment History Page	EB_PARTIAL_PAY_SCF	View a list of partial payments for the invoice.
Payment Details Page	EB_PAYCART_AGS2_FL	Review payment details. Select a different credit card profile for payment, edit an existing credit card profile, or add a new credit card profile.
Review and Submit Page	EB_PAYCART_AGS3_FL	Review payment totals and enter comments for a partial payment.
Payment Amount Detail Page	EB_PAY_DETAIL_SCF	View the payment amount details.
Payment Results Page	EB_PYMNT_RESULT_FL	View payment results.

These pages are used in the Payment Cart in the small form factor design (SFF), such as on smartphones.

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Page Name – SFF	*Definition Name*	*Usage*
Invoices to Pay Page	EB_PAYCART_AGS1_FL	Select a payment method and change payment date.
Invoice Detail Page	EB_PYCART_INV_SCF	Change payment amount and review invoice detail in the small form factor design. Add a reason for partial payments.
Partial Payment History Page	EB_PYCART_PPAY_SCF	View a list of partial payments for the invoice.
Payment Details Page	EB_PAYCART_AGS2_FL	Review payment details. Select a different credit card profile for payment, edit an existing credit card profile, or add a new credit card profile.
Review and Submit Page	EB_PAYCART_AGS3_FL	Review payment totals and enter comments for a partial payment.
Payment Amount Detail Page	EB_PAY_DETAIL_SCF	View the payment amount details.
Payment Results Page	EB_PYMNT_RESULT_FL	View payment results.

Invoices to Pay Page

The Invoices to Pay page is Step 1 in the Payment Cart for all payment methods.

Use the Invoices to Pay page (EB_PAYCART_AGS1_FL) to do the following:

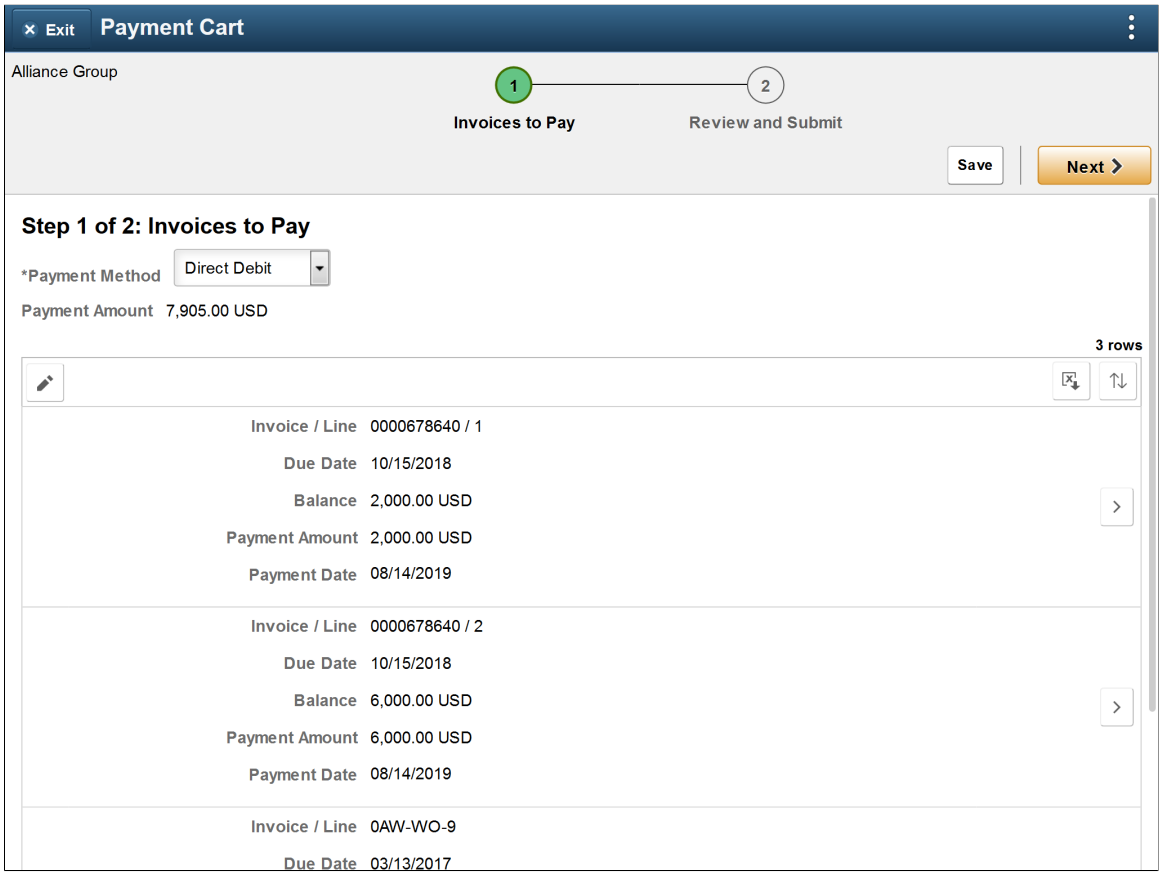
- (LFF) Select a payment method and change payment amount and date.
- (SFF) Select a payment method and change payment date.

Navigation:

Select the Payment Cart tile on My Homepage in the customer portal.

Or click the **Pay** button on the Invoice Balances page accessed through another tile.

This example illustrates the fields and controls on the Invoices to Pay page, Step 1 in the Payment Cart for a partial payment by credit card, as displayed on a laptop. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Payment Method	Select an available payment method from the drop-down list.
Clear Cart	Click the **Clear Cart** button to remove all invoices from the Payment Cart. The invoices are available for selection again after removal.
Totals by Division and **Division**	Appears if the invoice total for a division (or business unit) in the Payment Cart is negative. The total balance by currency for each division must be positive. Click the **Totals by Division** button to open the Payment Totals by Division page, where you can view payments grouped by division and currency.
Error and	Click the Error Detail button to open the Review Invoice Errors page. You must fix invoice errors before proceeding to the next step.
Invoice / Line	Displays the invoice ID and line number.

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Field or Control	*Description*
Due Date	Displays the due date.
Balance	Displays the balance on the invoice.
Payment Amount and **Currency**	(LFF) Displays the full invoice balance by default. Change the amount if paying a partial amount. (SFF) To change the payment amount on a smartphone, go to the Invoice Detail Page. Displays the invoice currency.
Payment Date	Displays the current date by default. Change the payment date if desired.
Partial Pay Reason	Select a partial payment reason (such as *Damage, Discount,* or *Short*) when the payment amount entered is less than the invoice balance.
Partial Payment History	Click the **Partial Payment History** icon to open the Partial Payment History page, where you can see a the partial payments made for the invoice.
Delete	Click the **Delete** icon for an invoice to remove the invoice from the Payment Cart.

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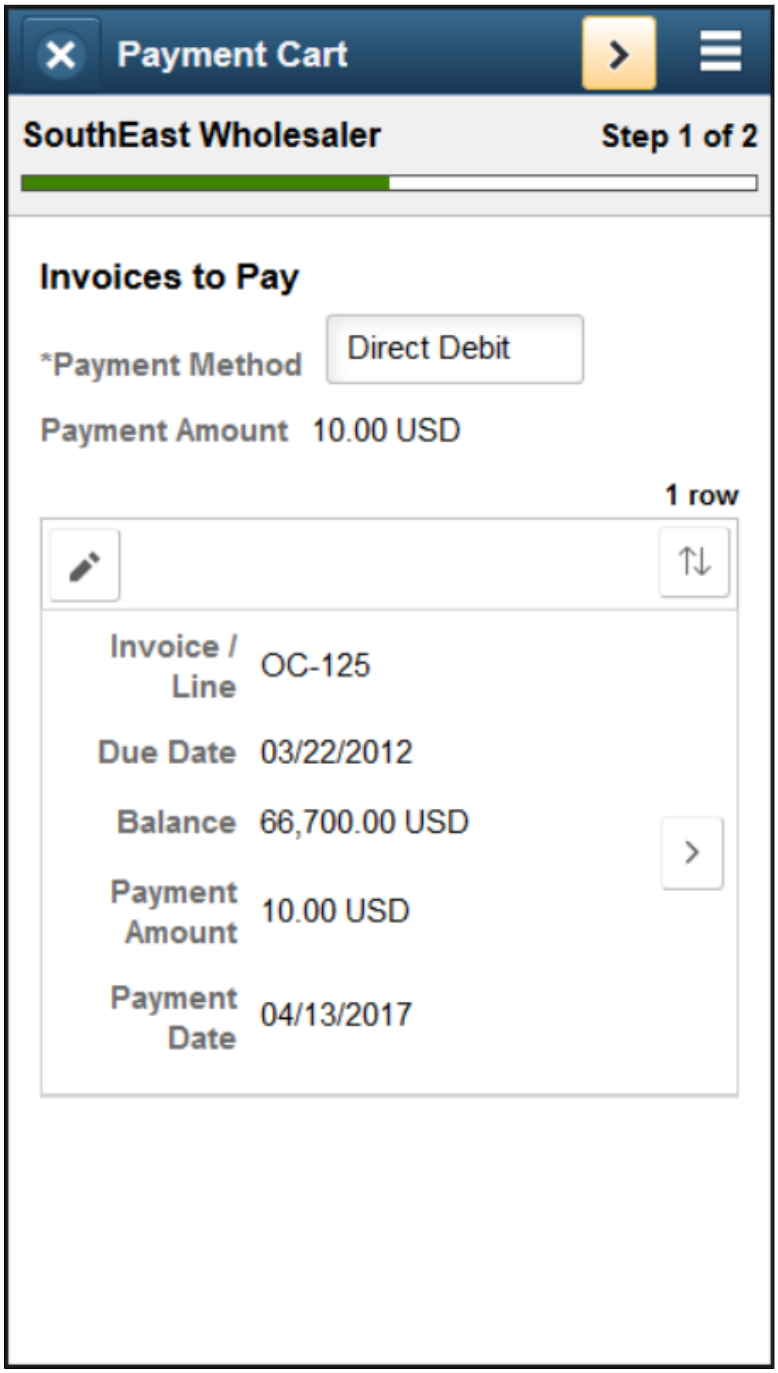
This example illustrates the fields and controls on the Invoices to Pay page, Step 1 in the Payment Cart for a partial payment by direct debit, as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



The following buttons appear in the small form factor design:

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Field or Control	*Description*
	Click the **Edit** button to select and delete individual invoices from the Payment Cart.
and	Click the **Deselect All** and **Select All** buttons to deselect or select all invoices in the Payment Cart.
	Click the **Delete** button to remove selected invoices from the Payment Cart.
	Click the **Sort** button to sort invoices in the Payment Cart by invoice fields.

Invoice Detail Page

Use the Invoice Detail page (EB_PYCART_INV_SCF) to change the invoice amount in the small form factor design. Add a reason for partial payments.

Navigation:

Click the **Show Detail Entry** button on the Invoices to Pay page.

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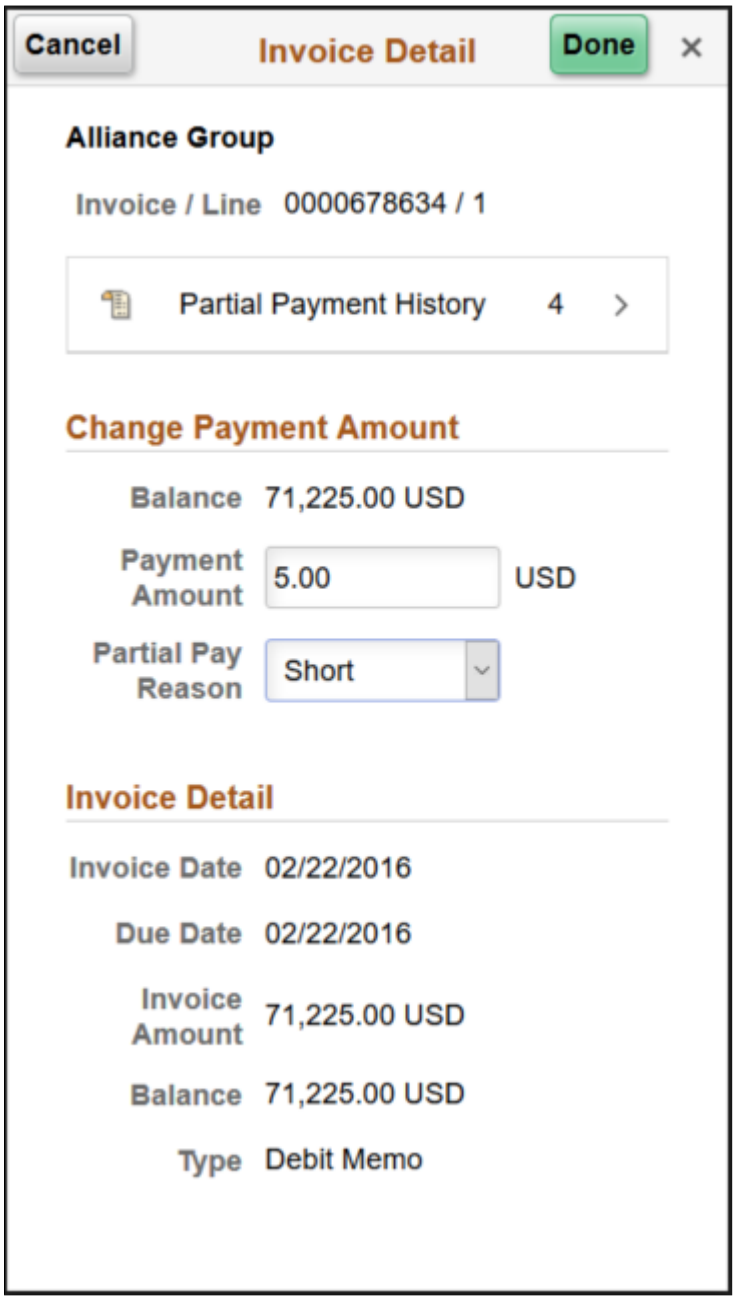
This example illustrates the fields and controls on the Invoice Detail page (SFF only) for a partial payment by credit card. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Partial Payment History	Displays the number of payments made for the invoice. Click to open the Partial Payment History page (EB_PYCART_PPAY_SCF), where you can view a list of partial payments with payment information.

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Change Payment Amount

Field or Control	*Description*
Payment Amount	Enter the payment amount for this transaction.
Partial Pay Reason	Select a reason for partial payments, such as *Damaged, Discount,* or *Short*.

Invoice Detail

View the invoice detail, including invoice date and amount, due date, balance on the invoice, and invoice type.

Payment Details Page

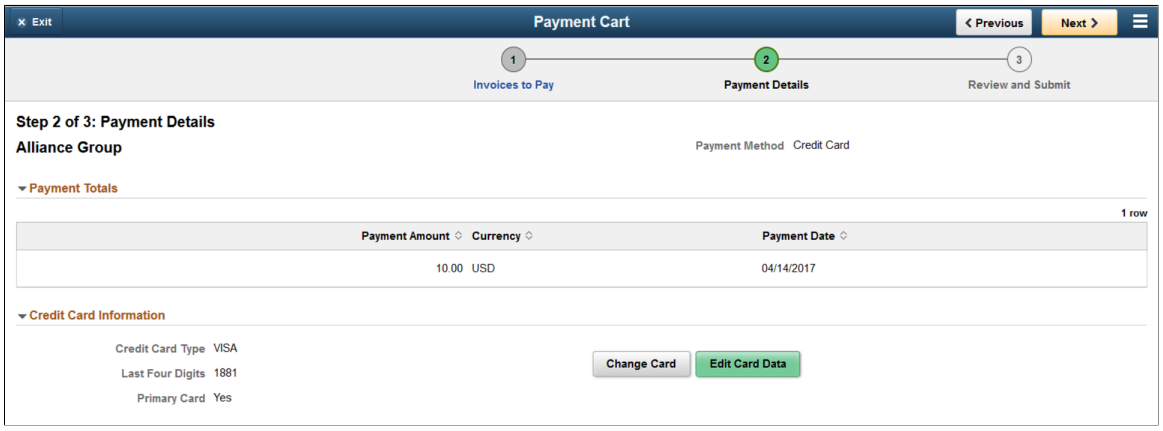
This step appears in the Payment Cart for credit card payments only.

Use Payment Details page (EB_PAYCART_AGS2_FL) to review payment details. Select a different credit card profile for payment, edit an existing credit card profile, or add a new credit card profile.

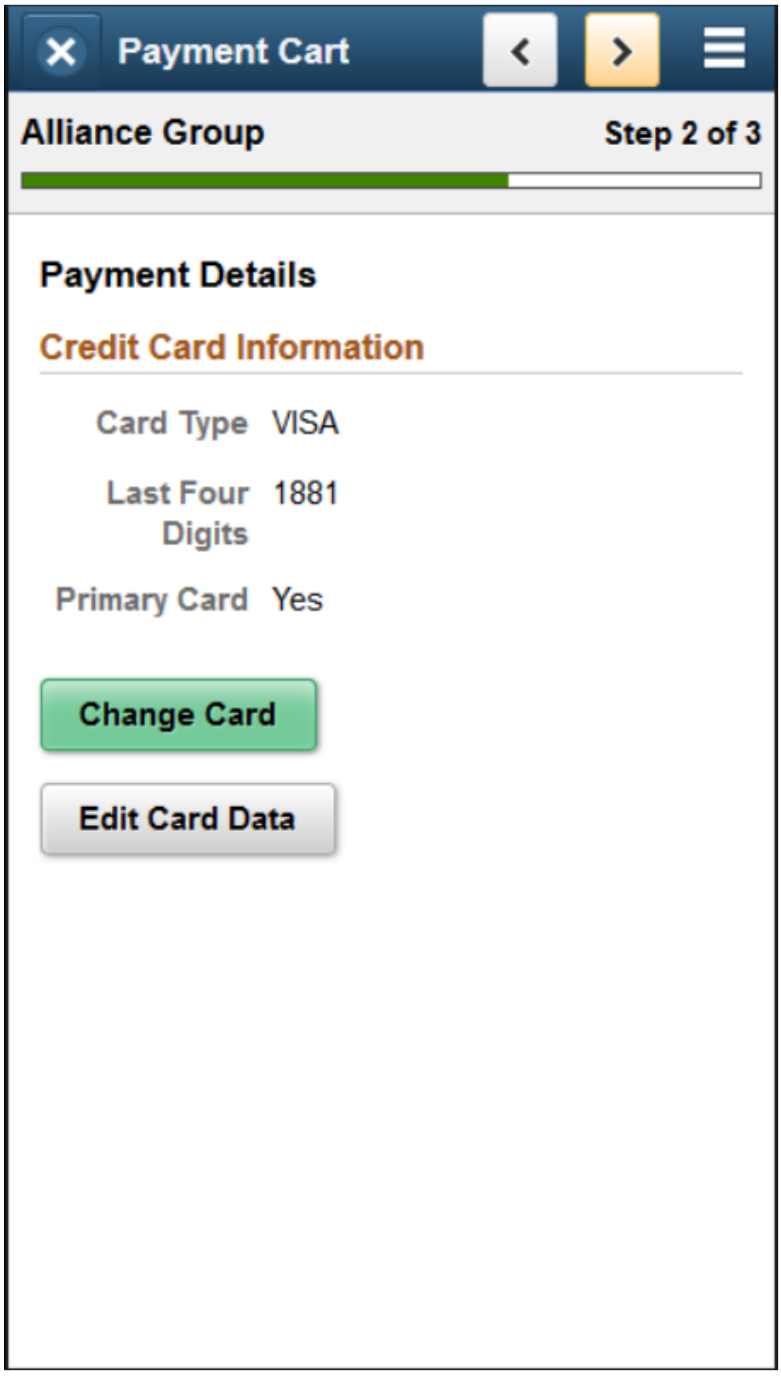
Navigation:

Click the **Next** button on the Invoices to Pay page.

This example illustrates the fields and controls on the Payment Details page, which is Step 2 in the Payment Cart for credit card payments, as displayed on a laptop. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Example of the Payment Details page, Step 2 in the Payment Cart for credit card payments, as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Credit Card Information	Displays the profile information for the credit card used to make the payment. Profile information includes credit card type, last four digits of the credit card number, and whether the credit card is the primary or default card used for payments.

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Field or Control	*Description*
Change Card	Click this button to open the Change Card page (EB_PYCART _CARD_SCF), where you can select a different card in your profile or access the third-party credit card hosting website to add a new credit card.
Edit Card Data	Click this button to edit credit card data in the third-party credit card hosting website.

Review and Submit Page

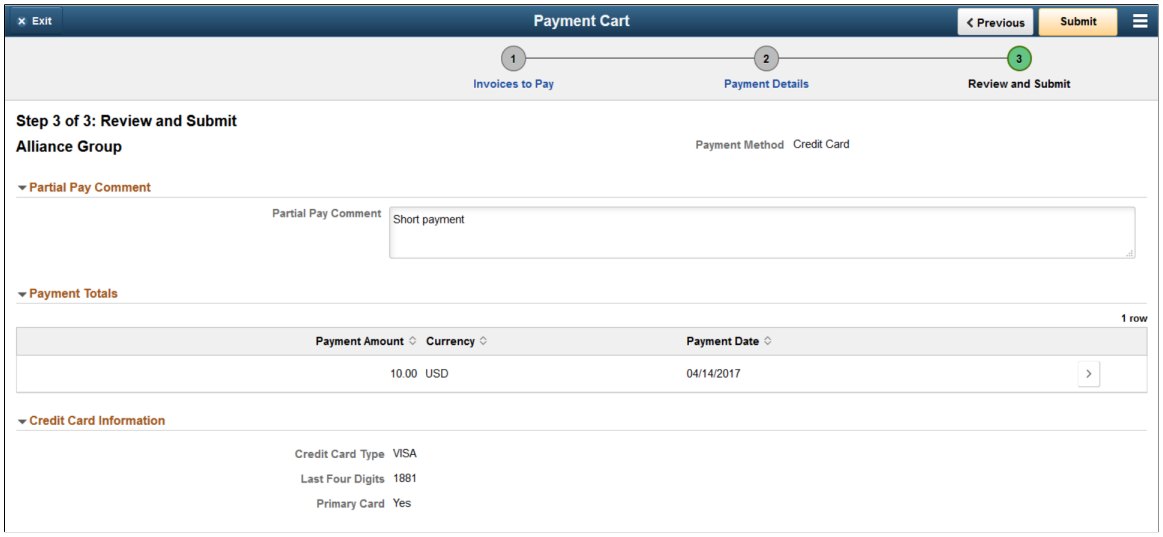
This is the last step in the Payment Cart before submitting a payment for processing.

Use Review and Submit page (EB_PAYCART_AGS3_FL) to review payment totals and enter comments for a partial payment.

Navigation:

Click the **Next** button on the Invoices to Pay or Payment Details page, depending on the payment method.

This example illustrates the fields and controls on the Review and Submit page for a credit card partial payment on a laptop. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Partial Pay Comment	Enter a comment regarding the partial payment.
Payment Totals	Click the **Show Detail Entry** button to review payment details on the Payment Amount Detail page (EB_PAY_DETAIL_ SCF).

Field or Control	*Description*
Credit Card Information or **Direct Debit Information**	Depending on the payment method, this section displays the credit card type and last four digits or beneficiary bank for direct debit payments.

Payment Results Page

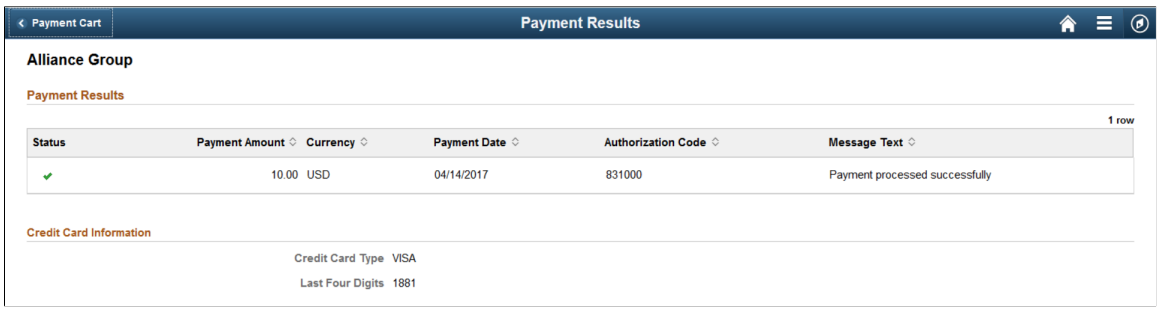
The Payment Results page appears after submitting a payment in the Payment Cart. Depending on the payment type, this page displays an authorization code for credit card payments or a transaction ID when provided by third-party processing,

Use the Payment Results page (EB_PYMNT_RESULT_FL) to view payment results.

Navigation:

Click the **Submit** button on the Review and Submit page.

This example illustrates the fields and controls on the Payment Results page for a credit card payment, on the large form factor design. You can find definitions for the fields and controls later on this page.



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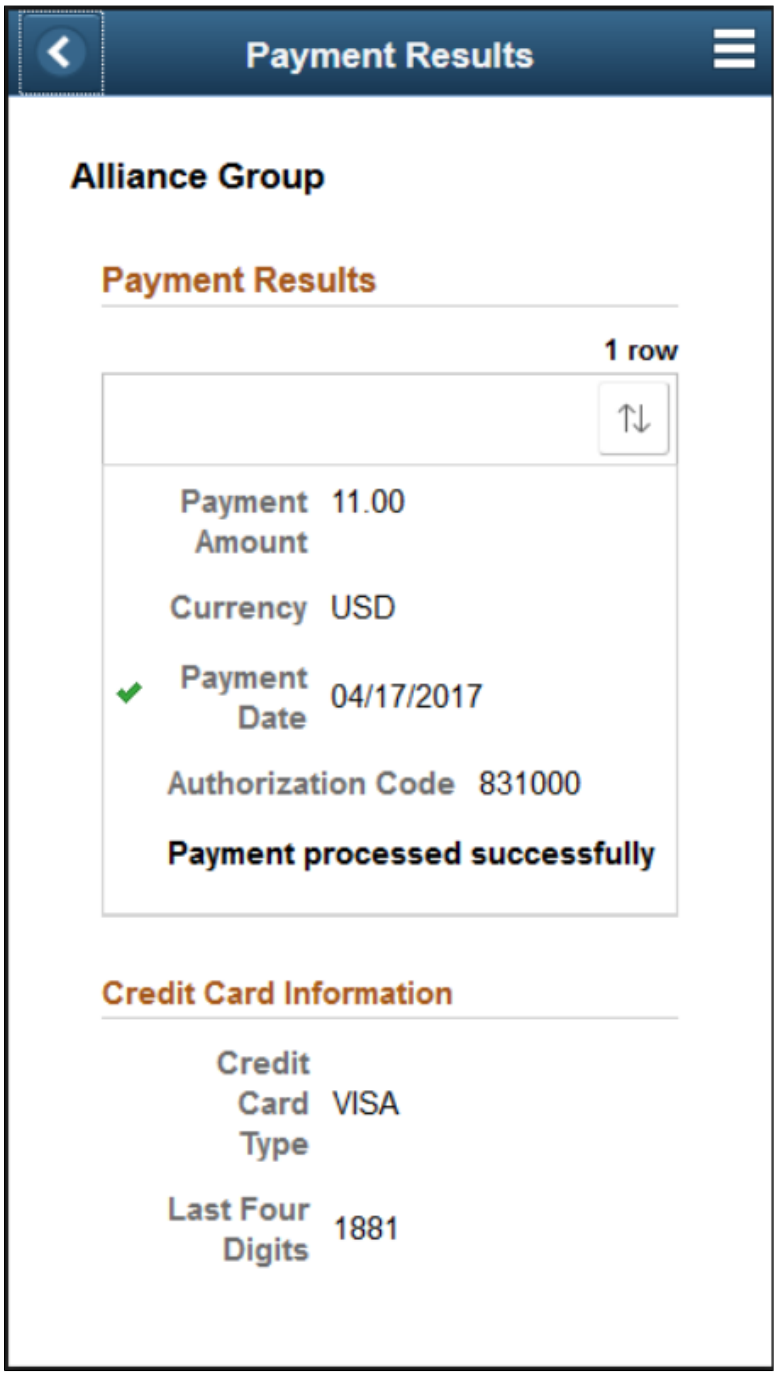
This example illustrates the fields and controls on the Payment Results page for a credit card payment, as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Status is (success) or (error)	Indicates a successful status with a check mark icon or error status with an exclamation mark icon.

Field or Control	*Description*
Authorization Code	Displays an authorization code returned by the third-party payment gateway. Make a record of this code for billing inquiries.
Message Text	Displays a statement generated by the third-party payment processor that the payment was processed successfully or an error occurred.
Correct Payment Errors	Appears when an error occurs after submitting a payment. Click this button to add the invoice with the error to the Payment Cart, replacing existing invoices in the cart. You can then resubmit the payment to resolve the issue. For a persistent issue, contact the biller. See Using the Message Center.

To go back to the Fluid eBill Payment homepage, select *Home* in the Action List menu.

Paying by Credit Card in the Payment Cart (Fluid)

This topic discusses how to pay by credit card in the Payment Cart, using a laptop or a smartphone.

For more information about the fields and controls on pages in the Payment Cart, see Using the Payment Cart in Fluid eBill Payment.

Pages Used to Pay by Credit Card in the Payment Cart

Page Name	*Definition Name*	*Usage*
Step 1 of 3: Invoices to Pay	EB_PAYCART_AGS1_FL	Select a payment method and date. Change the payment amount in the large form factor design.
Invoice Detail Page (SFF)	EB_PYCART_INV_SCF	Change payment amount and review invoice detail in the small form factor design. Add a reason for partial payments.
Step 2 of 3: Payment Details	EB_PAYCART_AGS2_FL	Review payment totals. Use a different credit card profile.
Step 3 of 3: Review and Submit	EB_PAYCART_AGS3_FL	Review credit card payment information and submit payment. Add a partial payment comment.
Payment Results Page	EB_PYMNT_RESULT_FL	View payment results, including authorization code for credit cards.

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Paying by Credit Card in the Payment Cart on a Laptop

To pay an amount by credit card in the Payment Cart on a laptop:

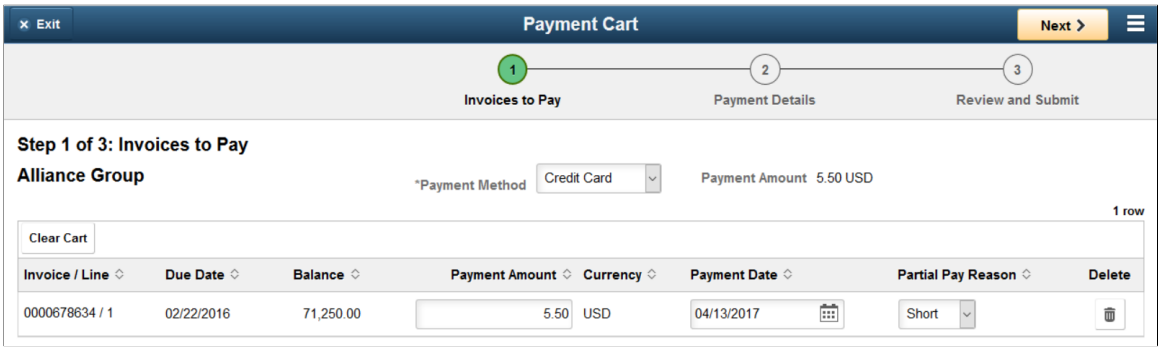
1. Select the Payment Cart tile or access through another page, such as the Invoice Balances page. See Account Summary tile and Make a Payment tile.

2. On Step 1 of 3: Invoices to Pay, select *Credit Card* from the payment method options.

   Change the payment amount, if desired. If the amount is a partial payment, enter a partial payment reason.

   The default payment date is the current date. Change the payment date, if desired.

   This example illustrates the fields and controls on the Step 1 of 3: Invoices to Pay page, using a credit card, as displayed on a laptop (LFF).



Important! If you are paying a partial amount of the invoice, you must enter a partial payment reason before proceeding to the next screen. A missing partial payment reason triggers an error, which you must fix before continuing. Click the error icon that appears to view error details.

---

3. Click the **Next** button.

4. On Step 2 of 3: Payment Details page, review the payment totals.

   Select a different credit card for payment by clicking the **Change Card** button.

   Select the **Edit Card Data** button to edit an existing credit card profile or add a new credit card profile.

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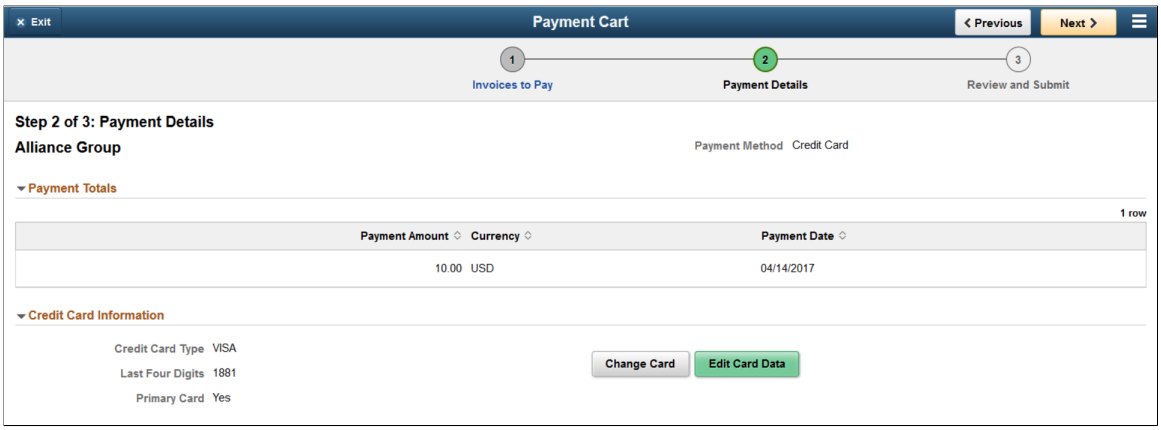
This example illustrates the fields and controls on the Step 2 of 3: Payment Details for a credit card payment (LFF). You can find definitions for the fields and controls later on this page.



For information about selecting a different credit card profile using the **Change Card** button, see Updating or Changing Credit Card Information in Fluid eBill Payment.

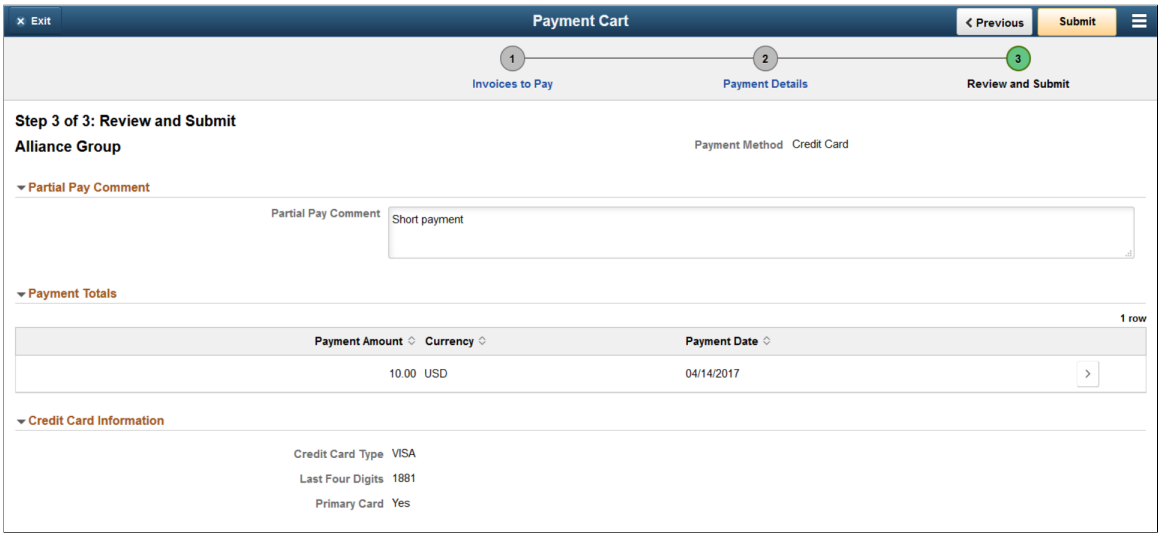
For information about editing credit card data using the **Edit Card Data** button, see Updating or Changing Credit Card Information in Fluid eBill Payment.

5. Select the **Next** button.

6. On Step 3 of 3: Review and Submit, add a comment for partial payments.

   Review payment totals and credit card information.

   This example illustrates the fields and controls on the Step 3 of 3: Review and Submit a credit card payment (LFF).



7. Click the **Submit** button.

8. The Payment Results page appears.

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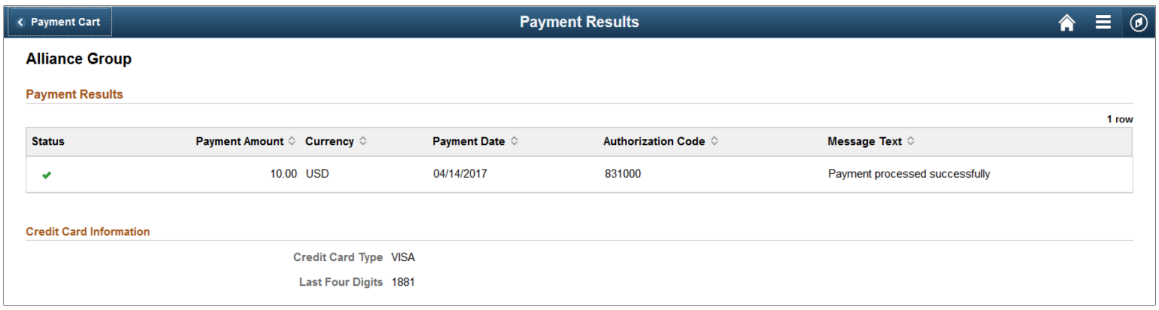
This example illustrates the fields and controls on the Payment Results page for a credit card payment (LFF).



Click the **Payment Cart** button to return to the Payment Cart. If you have made a partial payment, the invoice remains in the Payment Cart. You can review completed partial payments in Step 1: Invoices to Pay by clicking the **Partial Payment History** icon. A message is automatically created for partial payments.

Click the **Action List** icon in the banner, and select *Home* to return to your Fluid eBill Payment homepage.

Paying by Credit Card in the Payment Cart on a Smartphone

To pay an amount by credit card in the Payment Cart on a smartphone:

1. Select the Payment Cart tile or access through another page, such as the Invoice Balances page. See Account Summary tile and Make a Payment tile.

2. On Step 1 of 3: Invoices to Pay, select *Credit Card* from the payment method options.

   Click the **Edit** button to change the payment date or select one or more invoices to remove from the cart.

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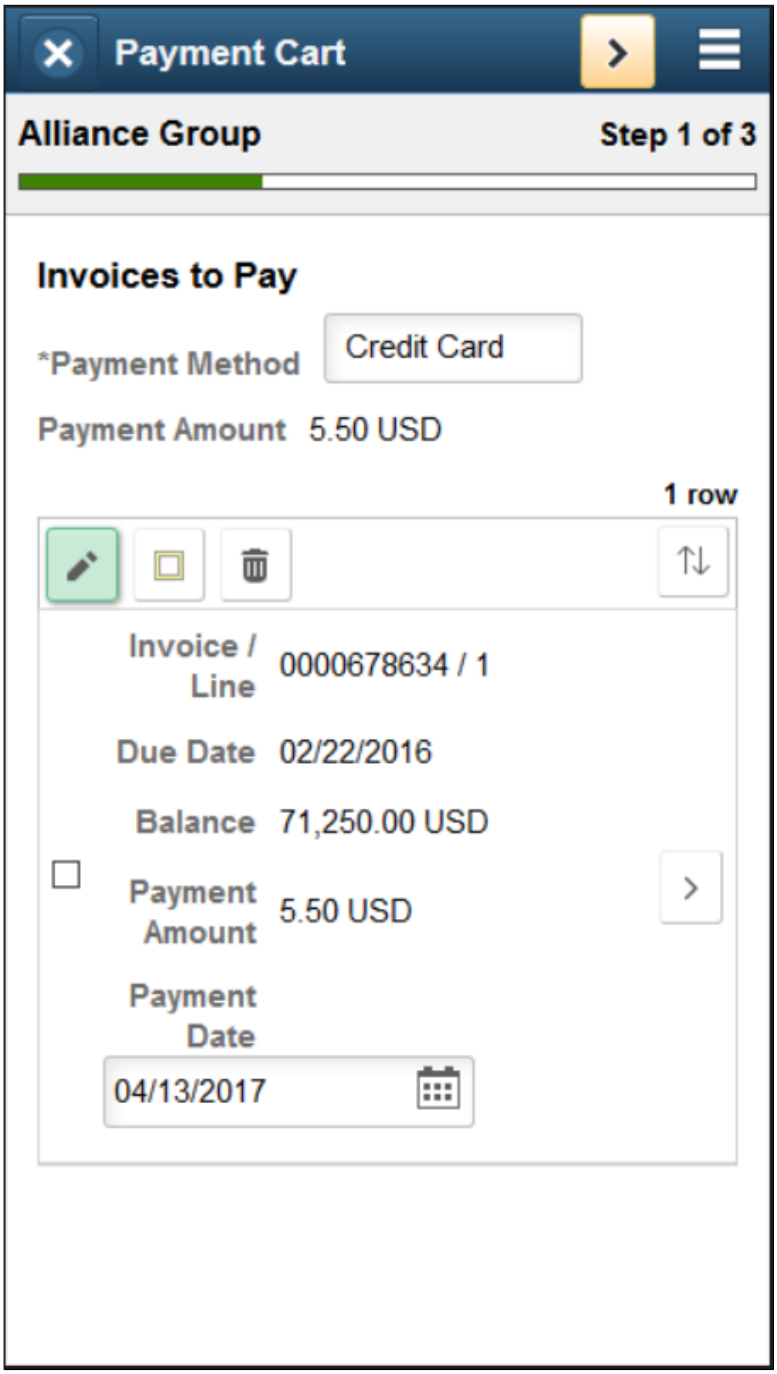
This example illustrates the fields and controls on the Step 1 of 3: Invoices to Pay page, using a credit card, as displayed on a smartphone (SFF). You can find definitions for the fields and controls later on this page.



3. Select the **Show Detail Entry** button for an invoice to change the payment amount on the **Invoice Detail** page.

   If the amount is a partial payment, enter a partial payment reason.

4. Click the > (Next) button in the Payment Cart banner.

5. On Step 2 of 3: Payment Details page, review the payment totals.

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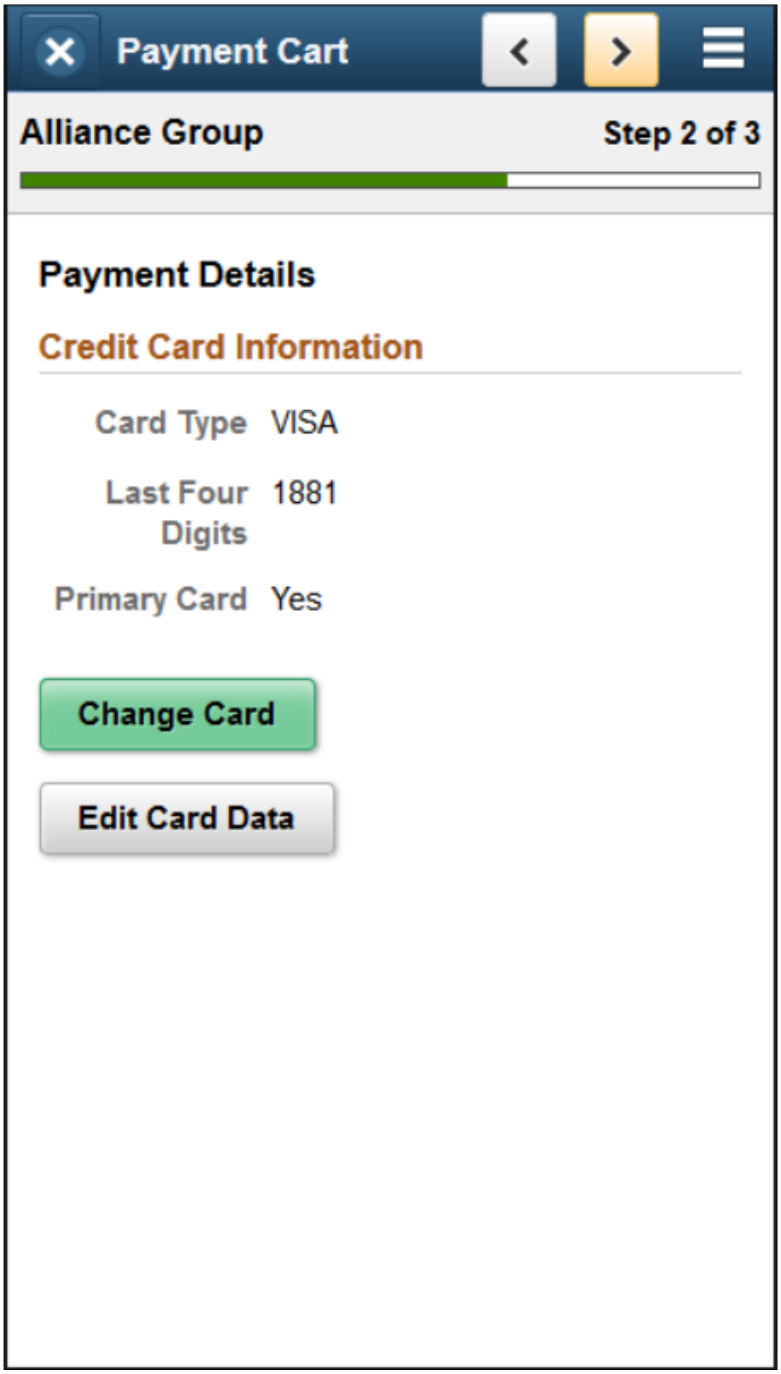
Select a different credit card for payment by clicking the **Change Card** button.

Select the **Edit Card Data** button to edit an existing credit card profile or add a new credit card profile.

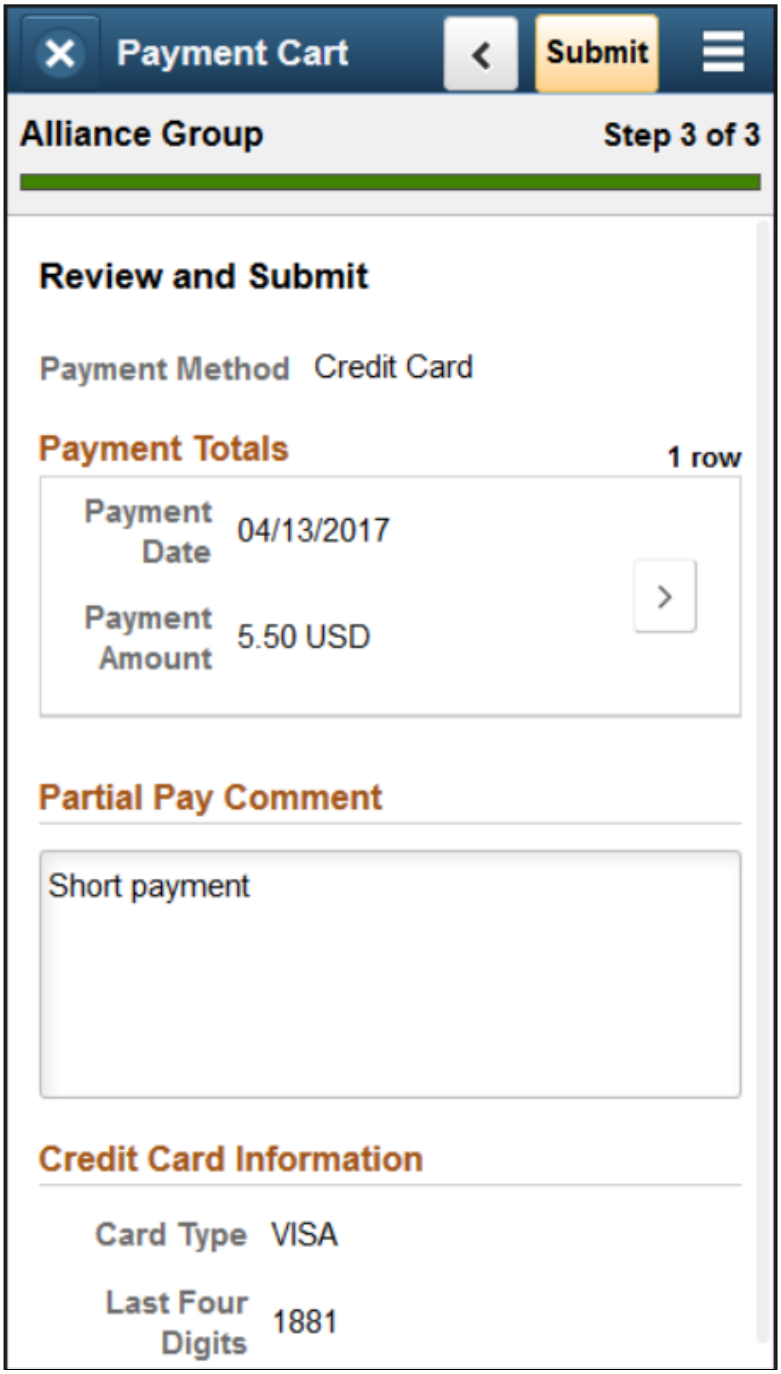
This example illustrates the fields and controls on the Step 2 of 3: Payment Details for a credit card payment (SFF).



6. Select the > (Next) button in the Payment Cart banner.
7. On Step 3 of 3: Review and Submit, add a comment for partial payments.

Review payment totals and credit card information.

This example illustrates the fields and controls on the Step 3 of 3: Review and Submit a credit card payment (SFF).



8. Click the **Submit** button.
9. The Payment Results page appears.

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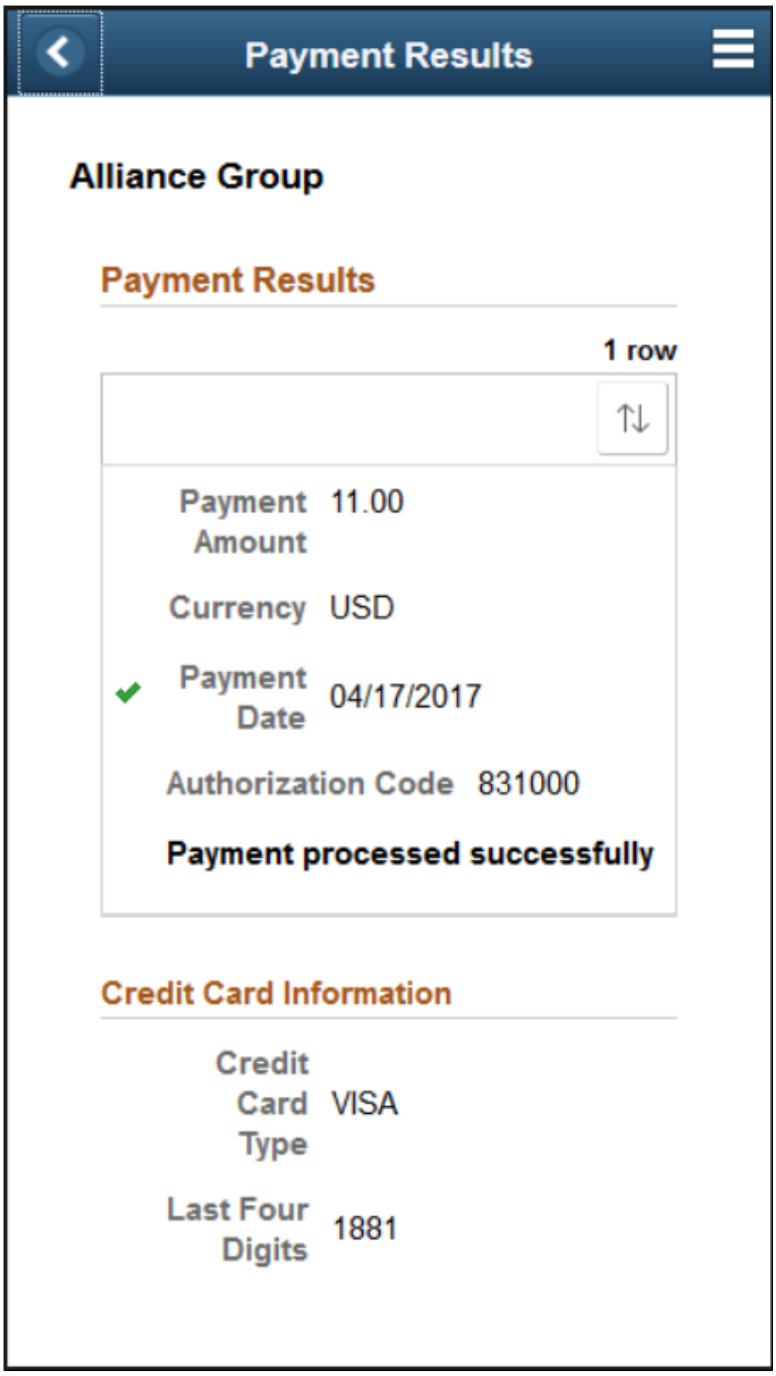
This example illustrates the fields and controls on the Payment Results page for a credit card payment (SFF).



Click the **Back** button on the Payment Cart banner to return to the Payment Cart. If you have made a partial payment, the invoice remains in the Payment Cart. You can review completed partial payments in Step 1: Invoices to Pay by clicking the **Partial Payment History** icon. A message is automatically created for partial payments.

Click the **Action List** icon in the banner and select *Home* to return to your Fluid eBill Payment homepage.

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Updating or Changing Credit Card Information in Fluid eBill Payment

Use the Change Card page (EB_PYCART_CARD_SCF) to select a different card in your profile or access the third-party credit card hosting website to add a new credit card.

Navigation:

- (Payment Cart tile) Click the **Change Card** button on Step 2: Payment Details in the Payment Cart when the payment method is credit card.
- (Account Settings tile) Select **Credit Cards** on the Account Settings page.

When adding a credit card profile, PeopleSoft Fluid eBill Payment transfers the user to the third-party credit card host. When changes are complete, the user is transferred back to Fluid eBill Payment to complete the credit card transaction. The transfer also occurs when the user clicks the **Edit Card Data** button to edit a credit card profile.

Paying by Direct Debit in the Payment Cart (Fluid)

This topic discusses how to pay by direct debit in the Payment Cart, using a laptop or a smartphone.

For more information about the fields and controls on pages in the Payment Cart, see Using the Payment Cart in Fluid eBill Payment.

Pages Used to Pay by Direct Debit in the Payment Cart

Page Name	*Definition Name*	*Usage*
Step 1 of 2: Invoices to Pay	EB_PAYCART_AGS1_FL	Select a payment method and date. Change the payment amount in the large form factor design.
Invoice Detail Page	EB_PYCART_INV_SCF	Change payment amount and review invoice detail in the small form factor design. Add a reason for partial payments.
Step 2 of 2: Review and Submit	EB_PAYCART_AGS3_FL	Review direct debit payment information and submit payment. Add a partial payment comment.
Payment Results Page	EB_PYMNT_RESULT_FL	View payment results.

Paying by Direct Debit in the Payment Cart on a Laptop

To pay by direct debit in the Payment Cart on a laptop:

1. Select the Payment Cart tile or access through another page, such as the Invoice Balances page. See Account Summary tile and Make a Payment tile.

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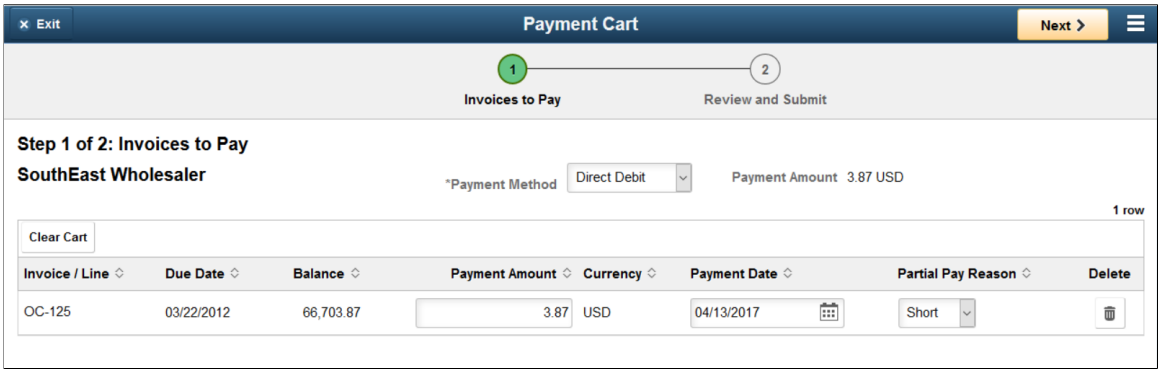
2. On Step 1 of 2: Invoices to Pay, select *Direct Debit* from the payment method options.

   Change the payment amount, if desired. If the amount is a partial payment, enter a partial payment reason.

   The default payment date is the current date. Change the payment date, if desired.

   This example illustrates the fields and controls on the Step 1 of 2: Invoices to Pay page for a direct debit payment as displayed on a laptop.

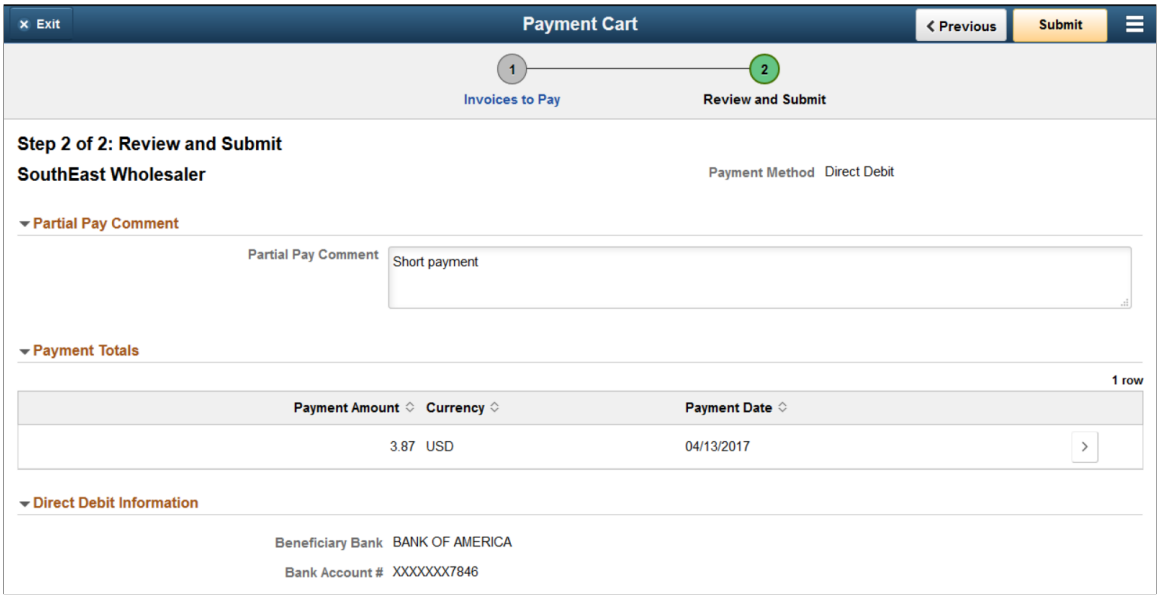


3. Click the **Next** button.

4. On Step 2 of 2: Review and Submit, add a comment for partial payments.

   Review payment totals and direct debit information.

   This example illustrates the fields and controls on the Step 2 of 2: Review and Submit page for a direct debit payment as displayed on a laptop.



5. Click the **Submit** button.

6. The Payment Results page appears.

   Click the **Payment Cart** button to return to the Payment Cart.

Click the **Action List** icon in the banner, and select *Home* to return to your Fluid eBill Payment homepage.

Paying by Direct Debit in the Payment Cart on a Smartphone

To pay by direct debit in the Payment Cart on a smartphone:

1. Select the Payment Cart tile or access through another page, such as the Invoice Balances page. See Account Summary tile and Make a Payment tile.
2. On Step 1 of 2: Invoices to Pay, select *Direct Debit* from the payment method options.

   Click the **Edit** button to change the payment date or select one or more invoices to remove from the cart.

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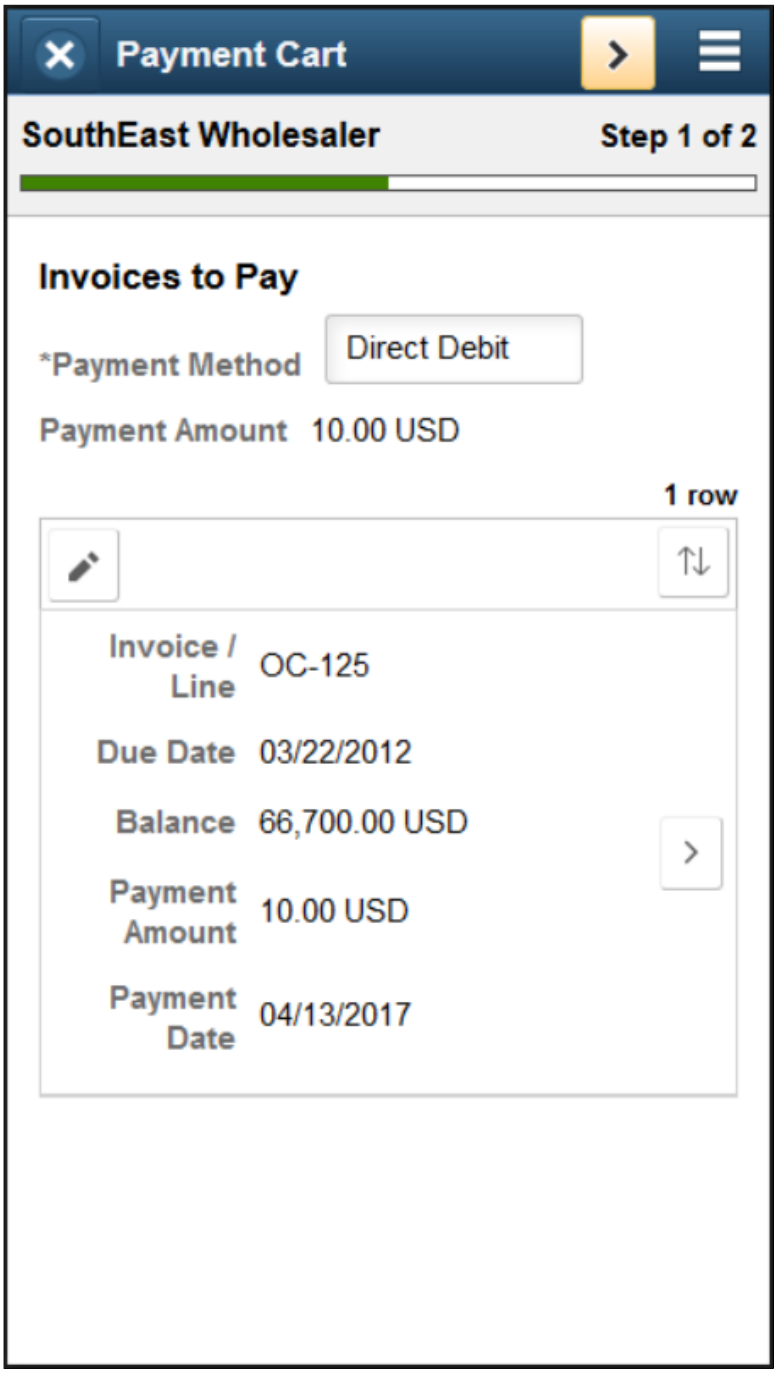
This example illustrates the fields and controls on the Step 1 of 2: Invoices to Pay page for a direct debit payment as displayed on a smartphone. You can find definitions for the fields and controls in Using the Payment Cart in Fluid eBill Payment.



3. Select the **Show Detail Entry** button for an invoice to change the payment amount on the **Invoice Detail** page.

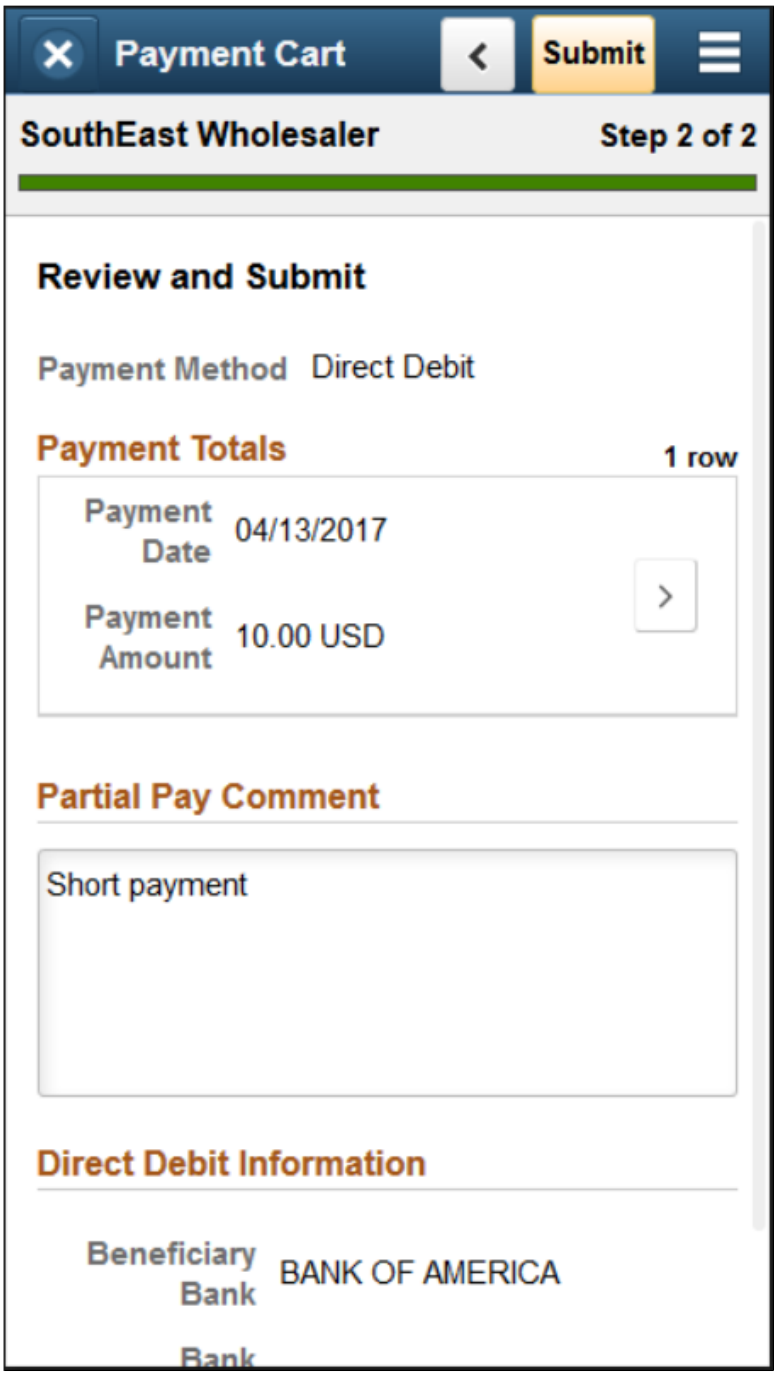
   If the amount is a partial payment, enter a partial payment reason.

4. Click the > (Next) button in the Payment Cart banner.

5. On Step 2 of 2: Review and Submit, add a comment for partial payments.

Review payment totals and direct debit information.

This example illustrates the fields and controls on the Step 2 of 2: Review and Submit page for a direct debit payment as displayed on a smartphone. You can find definitions for the fields and controls in Using the Payment Cart in Fluid eBill Payment.



6. Click the **Submit** button.
7. The Payment Results page appears.

   Click the **Back** button on the Payment Cart banner to return to the Payment Cart.

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Click the **Action List** icon in the banner and select *Home* to return to your Fluid eBill Payment homepage.

Paying by PayPal in the Payment Cart (Fluid)

This topic discusses how to pay by PayPal in the Payment Cart, using PeopleSoft Fluid eBill Payment on a laptop or a smartphone.

For more information about the fields and controls on pages in the Payment Cart in Fluid, see Using the Payment Cart in Fluid eBill Payment.

Pages Used to Pay by PayPal in the Payment Cart

Page Name	***Definition Name***	***Usage***
Step 1 of 2: Invoices to Pay	EB_PAYCART_AGS1_FL	Select a payment method and date. Change the payment amount in the large form factor design.
Invoice Detail Page	EB_PYCART_INV_SCF	Change payment amount and review invoice detail in the small form factor design. Add a reason for partial payments.
Step 2 of 2: Review and Submit	EB_PAYCART_AGS3_FL	Review payment information and submit payment. Add a partial payment comment.
Payment Results Page	EB_PYMNT_RESULT_FL	View payment results.

Paying by PayPal in the Payment Cart on a Laptop

You must have a PayPal account to pay by PayPal.

To pay by PayPal in the Payment Cart on a laptop:

1. Select the Payment Cart tile or access through another page, such as the Invoice Balances page. See Account Summary tile and Make a Payment tile.

2. On Step 1 of 2: Invoices to Pay, select *PayPal* from the payment method options.

   Change the payment amount, if desired. If the amount is a partial payment, enter a partial payment reason.

   The default payment date is the current date. Change the payment date, if desired.

3. Click the **Next** button.

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4. On Step 2 of 2: Review and Submit, add a comment for partial payments.

   Review payment totals and direct debit information.

5. Click the **Submit** button.

6. Log into PayPal using your PayPal username and password.

7. Confirm the payment in PayPal.

8. The Payment Results page appears in Fluid eBill Payment, including a transaction ID generated by PayPal.

   Click the **Payment Cart** button to return to the Payment Cart.

   Click the **Action List** icon in the banner, and select *Home* to return to your Fluid eBill Payment homepage.

Paying by PayPal in the Payment Cart on a Smartphone

You must have a PayPal account to pay by PayPal.

To pay by PayPal in the Payment Cart on a smartphone:

1. Select the Payment Cart tile or access through another page, such as the Invoice Balances page. See Account Summary tile and Make a Payment tile.

2. On Step 1 of 2: Invoices to Pay, select *Direct Debit* from the payment method options.

   Click the **Edit** button to change the payment date or select one or more invoices to remove from the cart.

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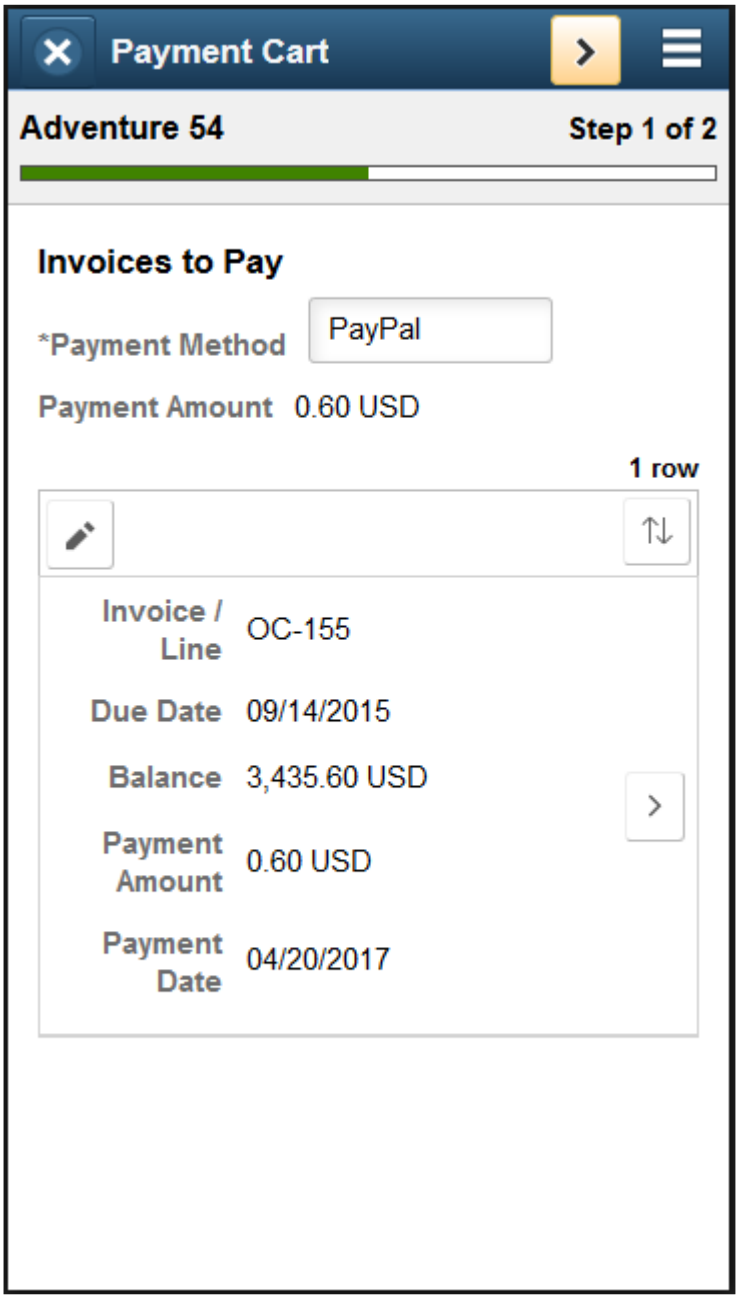
This example illustrates the fields and controls on the Step 1 of 2: Invoices to Pay page for a PayPal payment on a smartphone. You can find definitions for the fields and controls in Using the Payment Cart in Fluid eBill Payment.



3. Select the **Show Detail Entry** button for an invoice to change the payment amount on the **Invoice Detail** page.

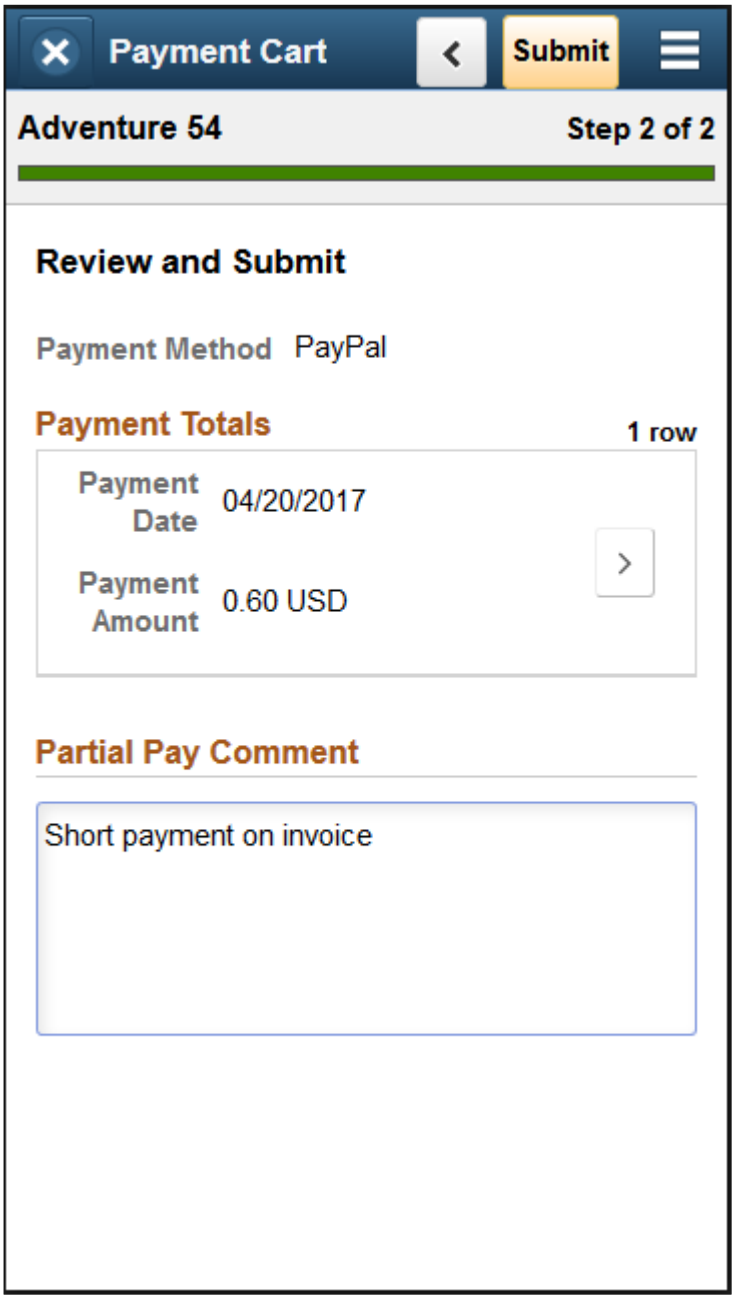
   If the amount is a partial payment, enter a partial payment reason. Close this page to continue.

4. Click the > (Next) button in the Payment Cart banner.

5. On Step 2 of 2: Review and Submit, add a comment for partial payments.

   Review payment totals.

This example illustrates the fields and controls on the Step 2 of 2: Review and Submit page for a PayPal payment on a smartphone. You can find definitions for the fields and controls later in Using the Payment Cart in Fluid eBill Payment.



6. Click the **Submit** button.
7. Log into PayPal using your PayPal username and password.
8. Confirm the payment in PayPal.
9. The Payment Results page appears in Fluid eBill Payment, including a transaction ID generated by PayPal.

   Click the **Back** button on the Payment Cart banner to return to the Payment Cart.

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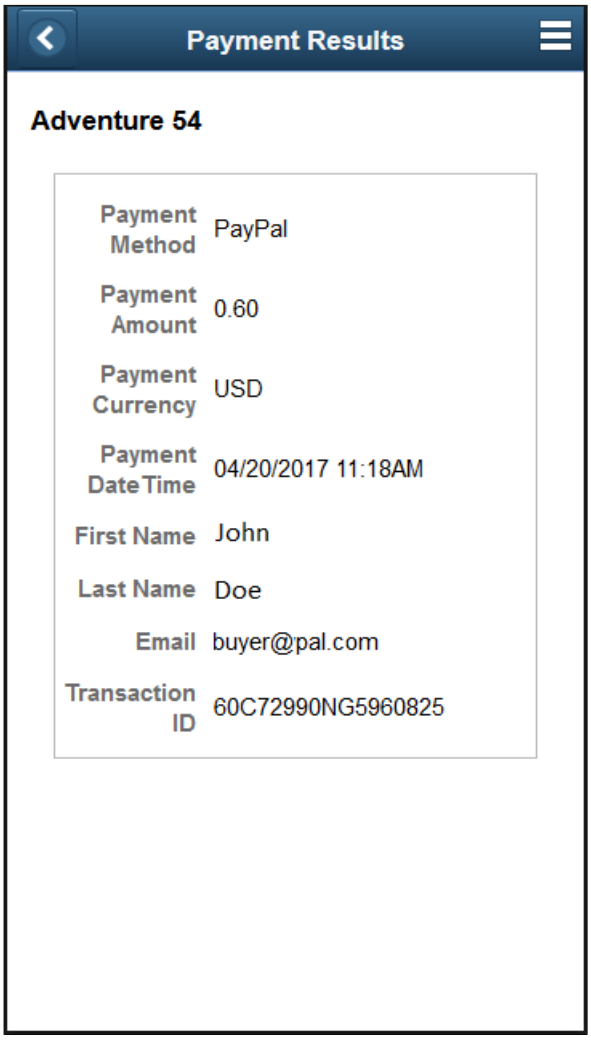
Click the **Action List** icon in the banner and select *Home* to return to your Fluid eBill Payment homepage.

This example illustrates the fields and controls on the Payment Results page for a PayPal payment on a smartphone. You can find definitions for the fields and controls in Using the Payment Cart in Fluid eBill Payment.



Paying by Electronic Check in the Payment Cart (Fluid)

This topic discusses how to pay by electronic check in the Payment Cart, using PeopleSoft Fluid eBill Payment on a laptop or a smartphone.

For more information about the fields and controls on pages in the Payment Cart in Fluid, see Using the Payment Cart in Fluid eBill Payment.

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Pages Used to Pay by Electronic Check in the Payment Cart

Page Name	*Definition Name*	*Usage*
Step 1 of 2: Invoices to Pay	EB_PAYCART_AGS1_FL	Select a payment method and date. Change the payment amount in the large form factor design.
Invoice Detail Page	EB_PYCART_INV_SCF	Change payment amount and review invoice detail in the small form factor design. Add a reason for partial payments.
Step 2 of 2: Review and Submit	EB_PAYCART_AGS3_FL	Review payment information and submit payment. Add a partial payment comment.
Payment Results Page	EB_PYMNT_RESULT_FL	View payment results.

Paying by Electronic Check in the Payment Cart on a Laptop

Contact the biller to set up a personal identification number (PIN) if required to authorize electronic funds transfer.

To pay by electronic check in the Payment Cart on a laptop:

1. Select the Payment Cart tile or access through another page, such as the Invoice Balances page. See Account Summary tile and Make a Payment tile.
2. On Step 1 of 2: Invoices to Pay, select *Electronic Check* from the payment method options.

   Change the payment amount, if desired. If the amount is a partial payment, enter a partial payment reason.

   The default payment date is the current date. Change the payment date, if desired.
3. Click the **Next** button.
4. On Step 2 of 2: Review and Submit, add a comment for partial payments.

   Review payment totals.

   Use the **I Agree** slider to authorize payment from your checking account.

   Enter your personal identification number (PIN) if required.
5. Click the **Submit** button.

   The system transfers funds electronically from your checking account through a third-party electronic check host, such as Cybersource.
6. The Payment Results page appears in Fluid eBill Payment, including a transaction ID provided by third-party processing to identify the payment.

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Click the **Payment Cart** button to return to the Payment Cart.

Click the **Action List** icon in the banner, and select *Home* to return to your Fluid eBill Payment homepage.

Paying by Electronic Check in the Payment Cart on a Smartphone

Contact the biller to set up a personal identification number (PIN) to authorize electronic funds transfer.

To pay by electronic check in the Payment Cart on a laptop:

1. Select the Payment Cart tile or access through another page, such as the Invoice Balances page. See Account Summary tile and Make a Payment tile.
2. On Step 1 of 2: Invoices to Pay, select *Electronic Check* from the payment method options.

   The default payment date is the current date. Change the payment date, if desired.

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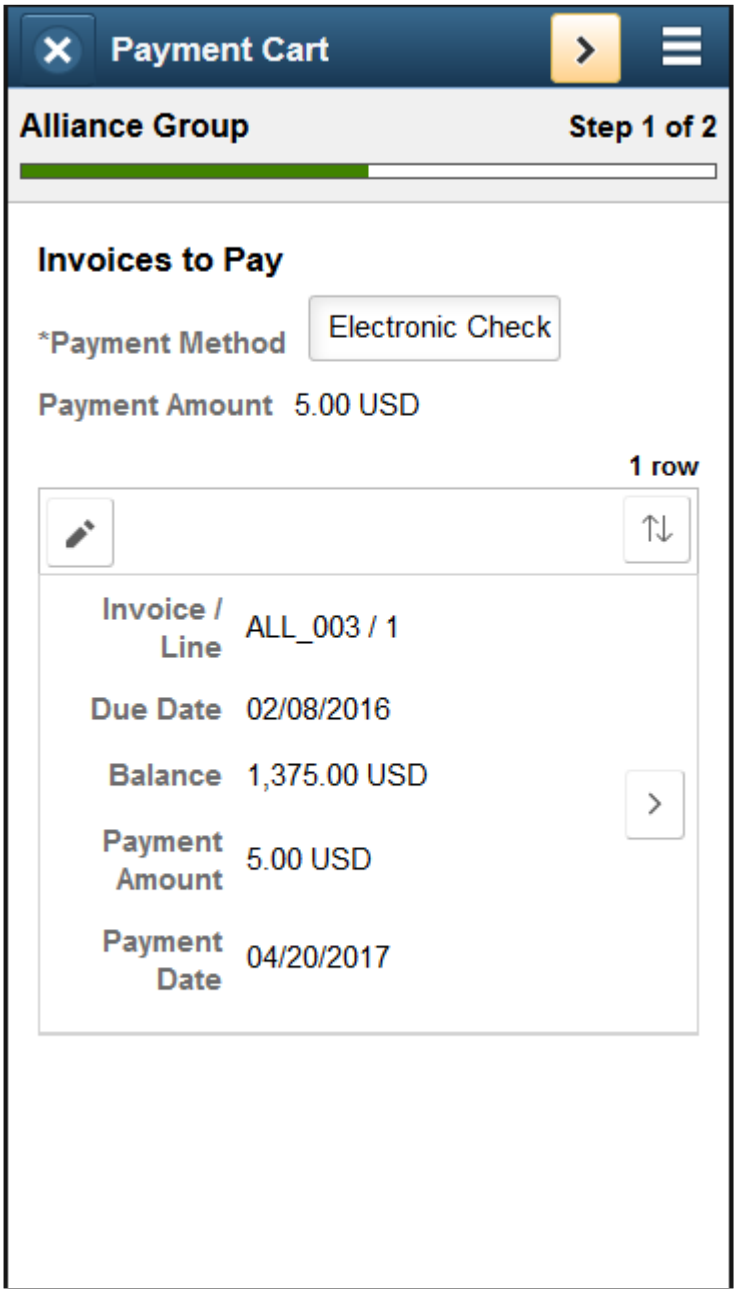
This example illustrates the fields and controls on the Step 1 of 2: Invoices to Pay page for an electronic check payment on a smartphone. You can find definitions for the fields and controls Using the Payment Cart in Fluid eBill Payment.



3. Select the **Show Detail Entry** button for an invoice to change the payment amount on the **Invoice Detail** page.

   If the amount is a partial payment, enter a partial payment reason. Close this page to continue.

4. Click the > (Next) button in the Payment Cart banner.

5. On Step 2 of 2: Review and Submit, add a comment for partial payments.

   Review payment totals.

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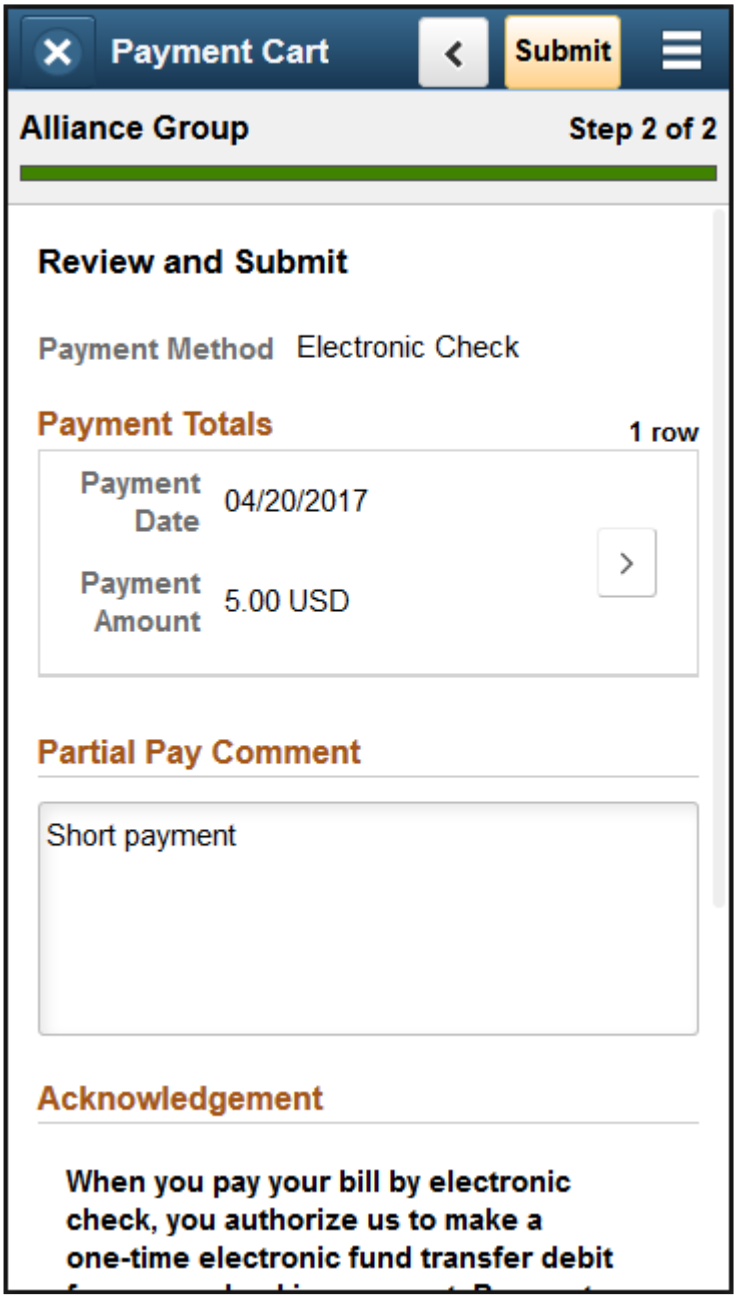
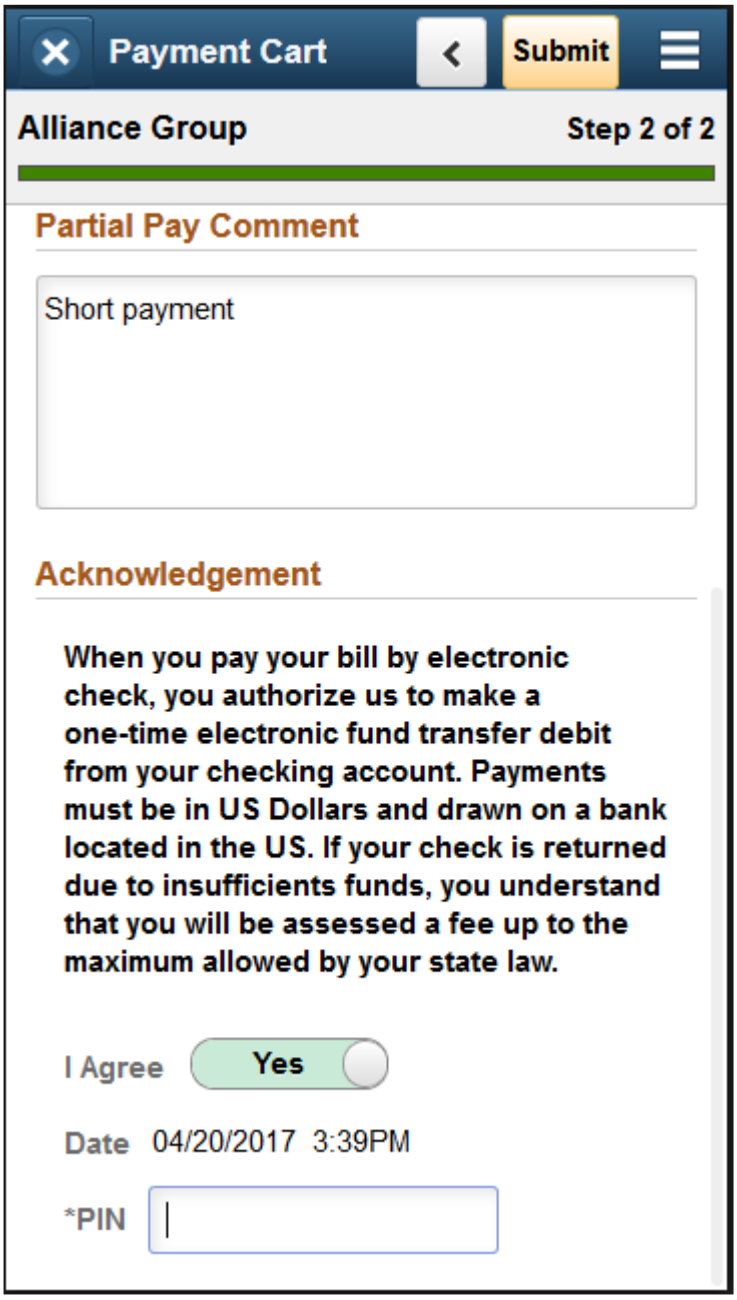
Use the **I Agree** slider to authorize payment from your checking account.

Enter your personal identification number (PIN) if required.

This example illustrates the fields and controls on the Step 2 of 2: Review and Submit page for an electronic check payment on a smartphone. You can find definitions for the fields and controls in Using the Payment Cart in Fluid eBill Payment.



This example illustrates the fields and controls on the Step 2 of 2: Review and Submit page for an electronic check payment on a smartphone, continued. You can find definitions for the fields and controls in Using the Payment Cart in Fluid eBill Payment.



6. Click the **Submit** button.

   The system transfers funds electronically from your checking account through a third-party electronic check host, such as Cybersource.

7. The Payment Results page appears in Fluid eBill Payment, including a transaction ID provided by third-party processing to identify the payment.

   Click the **Back** button on the Payment Cart banner to return to the Payment Cart.

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Click the **Action List** icon in the banner, and select *Home* to return to your Fluid eBill Payment homepage.

Reviewing Payment Errors in Fluid eBill Payment

This topic discusses reviewing errors in Fluid eBill Payment after submitting a payment.

Page Used to Payment Errors in Fluid eBill Payment

Page Name	***Definition Name***	***Usage***
Payment Errors Page	EB_PAYERROR_SCF	Review errors generated by the third-party processor after submitting a payment.

Payment Errors Page

Use the Payment Errors page (EB_PAYERROR_SCF) to review errors generated by the third-party processor after submitting a payment.

Navigation:

Click the *Payment Errors* link in the Actions List menu on the Fluid eBill Payment banner.

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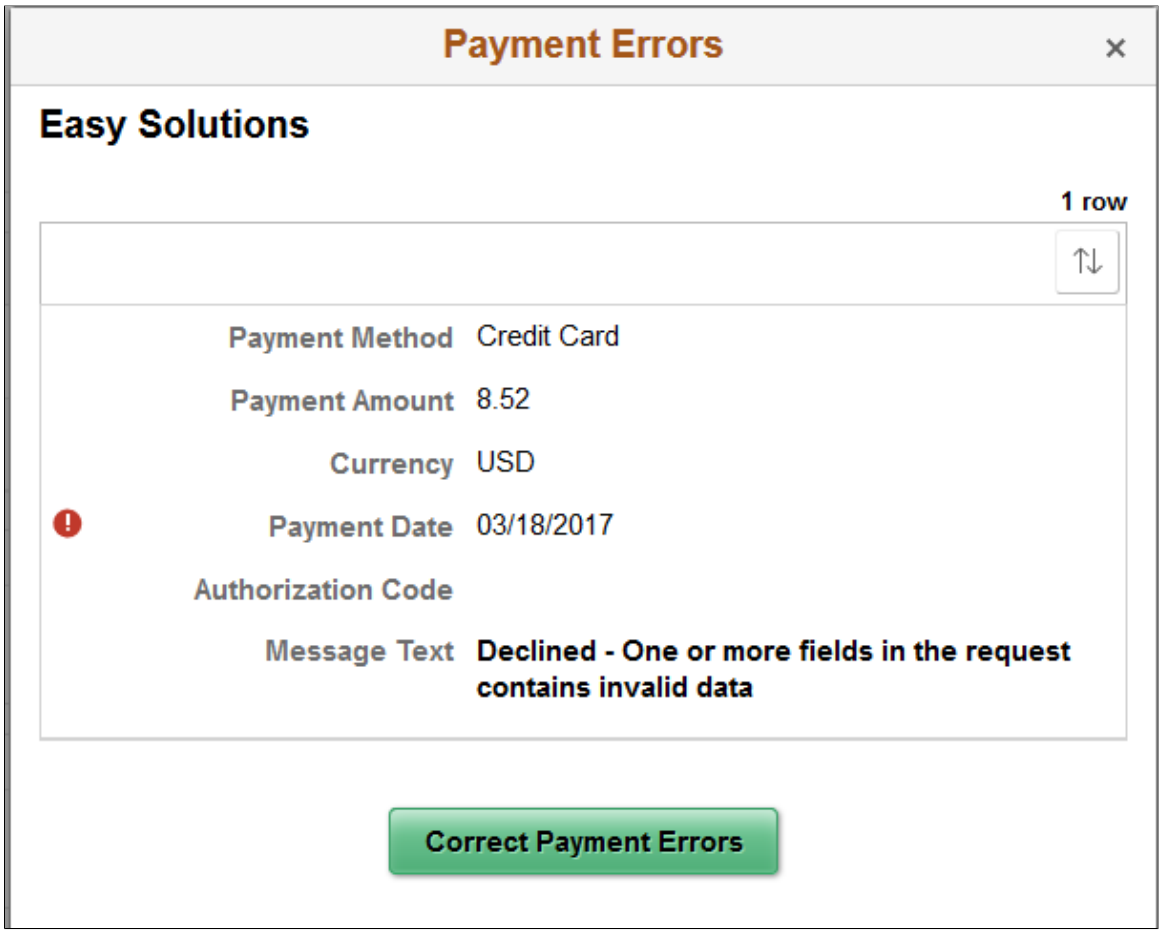
This example illustrates the fields and controls on the Payment Errors page (LFF). You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
	Indicates a payment in error status.
Message Text	Displays a statement generated by the third-party payment processor regarding the error that occurred.
Correct Payment Errors	Click this button to add the invoice with the error to the Payment Cart, replacing existing invoices in the cart. You can then resubmit the payment to resolve the issue. For a persistent issue, contact the biller. See Using the Message Center. **Note:** Error messages on the Payment Errors page are cleared when invoices are resubmitted.

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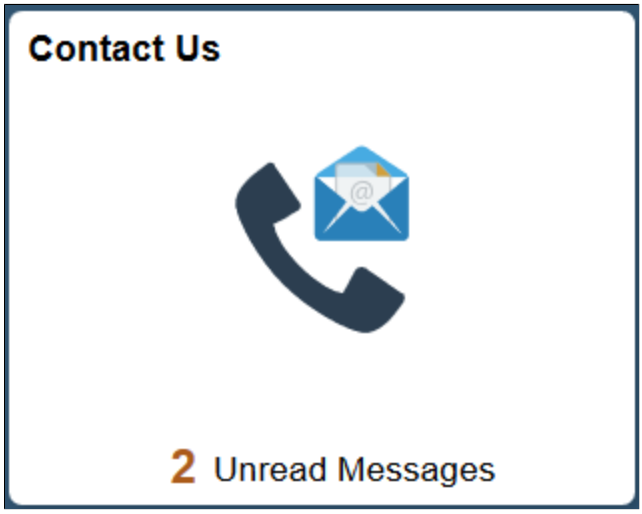
Chapter 11

Communicating in Fluid eBill Payment

Using the Message Center

This topic discusses how you can communicate in Fluid eBill Payment using the Message Center. You access the Message Center from your Fluid homepage through the Contact Us tile:

This example illustrates the fields and controls on the Contact Us Tile.



The Message Center gives brokers or users the ability to communicate with the biller within the framework of a mailbox inside Fluid eBill Payment. For example, a broker can send messages to biller service representatives about payments or invoices in a customer's Fluid eBill Payment account.

You can use the Message Center in the large form factor (LFF) and small form factor (SFF) design to do the following:

- Send messages to biller service representatives about account or invoice issues.
- Review messages and responses.
- Respond to biller messages.
- Filter messages by date range and other options, including conversation subject and topic.
- View biller phone contact information, when provided by the biller. Billers use installation pages to set up call options.

Billers send messages and responses to Fluid eBill Payment users through PeopleSoft Receivables conversation pages.

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Pages Used in the Message Center in Fluid eBill Payment

Page Name	*Definition Name*	*Usage*
Contact Us Page (LFF)	EB_CONTACT_US_FL	View biller phone contact information when provided by the biller. Create and review messages initiated in Fluid eBill Payment about your account.
Contact Us Page (SFF) • Message Center Page • Call Page (SFF)	• EB_MSGCENTER_SM_FL • EB_CALL_SCF	Select to view the Message Center or Call information. • Create and review messages initiated in Fluid eBill Payment about your account. • View biller phone contact information when provided by the biller.
Messages - Filters Page	EB_MSG_FLT_SCF	Narrow the results in the messages list by options including date range, conversation subject, subject topic, and invoice ID.
Message Detail Page	EB_MSGDTL_FL	Review message content about your Fluid eBill Payment account and add a response.
Add New Message Page	EB_ADDMSG_DTL_SCF	Initiate a new conversation in the Fluid eBill Payment application.
Add Response Page	EB_ADD_RESP_SCF	Enter a response to a message.
Invoices Page	EB_CONTACT_INV_SCF	View a list of invoices when a message references multiple invoices.

Contact Us Page (LFF)

Use the Contact Us page to view biller phone contact information when provided by the biller.

Create and review messages initiated in Fluid eBill Payment about your account. Billers send messages and responses to Fluid eBill Payment users using PeopleSoft Receivables conversation pages.

Navigation:

- Select the Contact Us tile on My Homepage in the customer portal.
- Open the **Message Center** through the Invoice Summary, Invoices, and Payment History pages.

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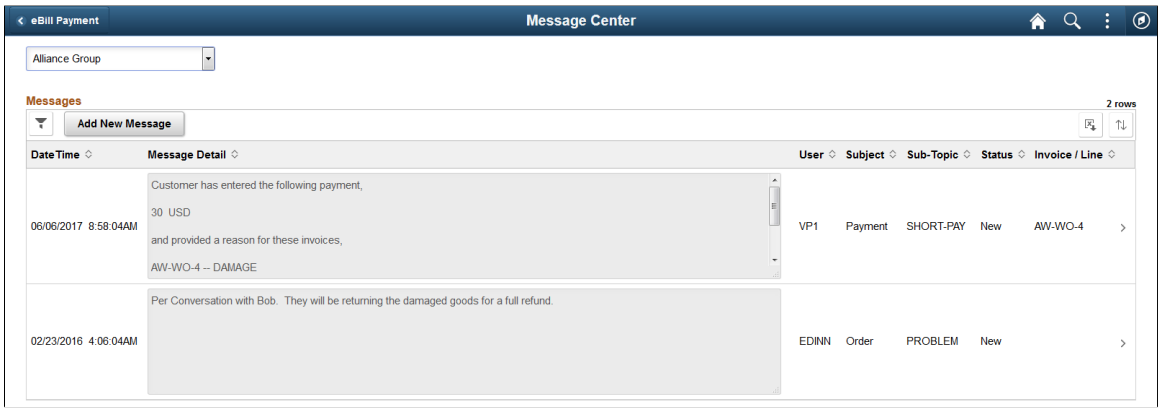
This example illustrates the fields and controls on the Contact Us page (LFF). You can find definitions for the fields and controls later on this page.



Call

If enabled by the biller, the biller contact information is displayed. This section is not shown if the biller has not set up the call options on the Fluid eBill Payment installation pages.

Messages

The date range of the messages displayed in the grid depends on the dates determined by the biller for the Fluid eBill Payment application and additional filtering performed by the user.

Field or Control	*Description*
	Select the Filter Items button to open the Filter page, where you can narrow the results you see on the **Messages** grid, as you would using a search page. When filters are in use, the filter button appears green.
Add New Message	Click to open the Add New Message page, where you can initiate a conversation.
Unread Message icon (dot)	Indicates that this message or a response to this message has not been read. This icon disappears once messages or responses have been read. A message has an unread status and appears in the count on the tile if the user has not yet viewed: • A message or response from the biller addressed to the current user. • A response from the biller to a message created by the current user.

Field or Control	*Description*
DateTime	Displays the date and time the message was sent.
Message Detail	Displays the body of the message.
User	Displays the user who created the message.
Subject and **Sub-Topic**	Displays the subject and subtopic of the conversation.
Status	Displays the message status.
Invoice / Line	Displays the invoice ID and line when the message references one invoice or line. When a message references more than one invoice or line, *** *Multiple Invoices* *** is displayed.
	Select the Multiple Invoices button when present to open the Invoices page (EB_CONTACT_INV_SCF), where invoices referenced in the message are listed.

Message Center Page

Use the Message Center page to create and review messages initiated in Fluid eBill Payment about your account.

Billers send messages and responses to Fluid eBill Payment users using PeopleSoft Receivables conversation pages.

Navigation:

Select the Contact Us tile on My Homepage in the customer portal, and select the **Message Center** button.

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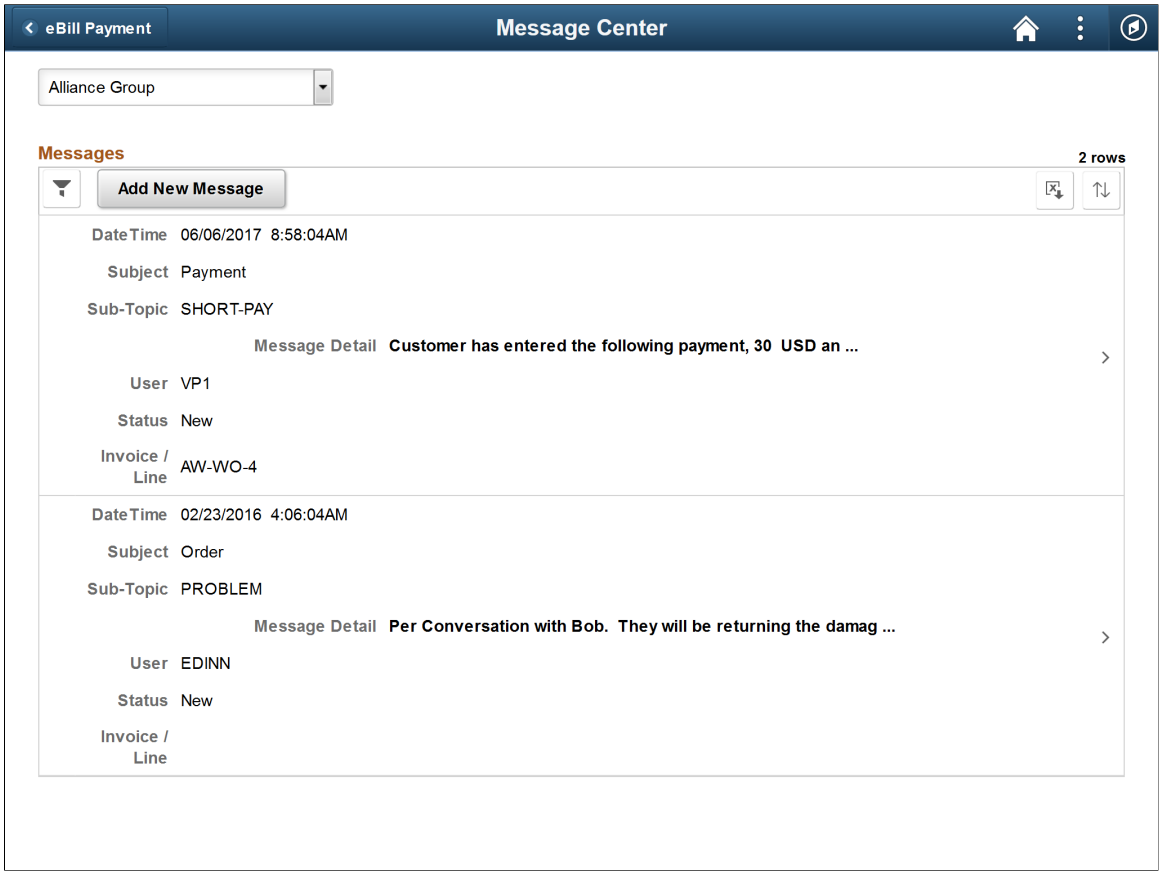
This example illustrates the fields and controls on the Message Center page.



Field or Control	*Description*
	Select the Sort Messages button to sort messages by the message fields, such as by date, subject or subtopic, user, or message status. If a sorting option has been selected, the button is green.

The message fields are the same on the large form factor design; only the formatting is different. For more information about the message fields, see the Contact Us Page (LFF).

Call Page (SFF)

Use the Call page to view biller phone contact information when provided by the biller.

Navigation:

Select the Contact Us tile on My Homepage in the customer portal, and select the **Call** button in the small form factor design.

If enabled by the biller, the biller contact information is displayed. This page is not shown if the biller has not set up the call options on the Fluid eBill Payment installation pages. The **Call** information is the same on the large form factor design; only the formatting is different.

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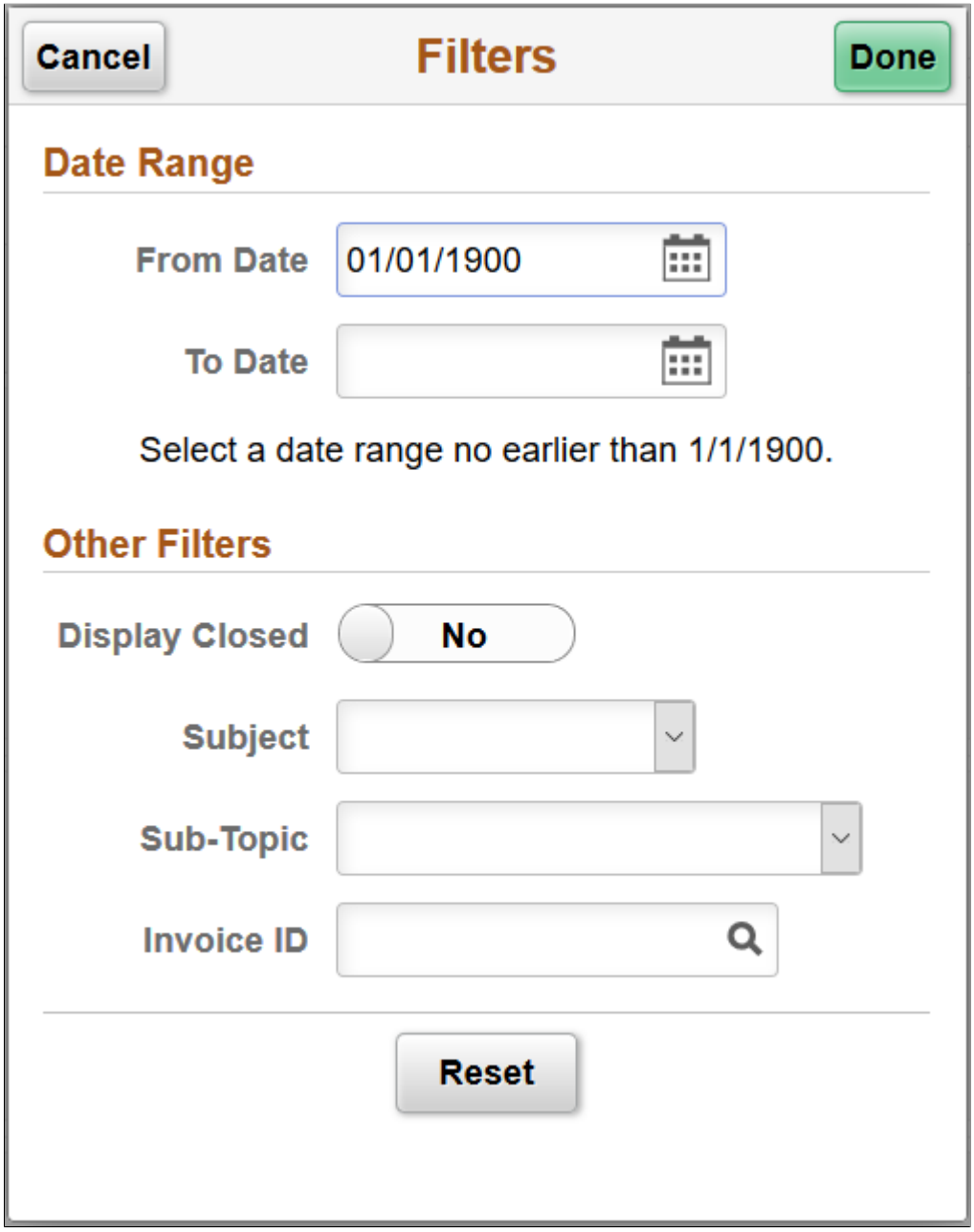
Messages - Filters Page

Use the Messages - Filters page to narrow the results in the messages list by options including date range, conversation subject, subject topic, and invoice ID.

Navigation:

Select the Filter Items button in the **Messages** grid.

This example illustrates the fields and controls on the Messages - Filters page. You can find definitions for the fields and controls later on this page.



The Filters page for the large form factor and the small form factor displays the same fields and formatting. Only the size differs.

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Date Range

Select a **From Date** and **To Date** to view messages created within in that timeframe, including the beginning and end dates. The biller may exclude messages older than a date specified in the application setup.

Other Filters

Field or Control	*Description*
Display Closed	Select *Yes* to display closed messages.
Conversation Subject	Select the subject of the conversation from the list.
Sub-Topic	Select the subtopic of the messages from the list of available topics.
Invoice ID	Enter one invoice number to see only messages for that invoice in the invoice list. Click the lookup prompt to search for invoice IDs using search operators to see results including Invoice, Entry Type, and Customer Name.

Click the **Reset** button to clear the filter fields.

Message Detail Page

Use the Message Detail page to review message content about your Fluid eBill Payment account and add a response.

Navigation:

Select a message row in the **Messages** grid.

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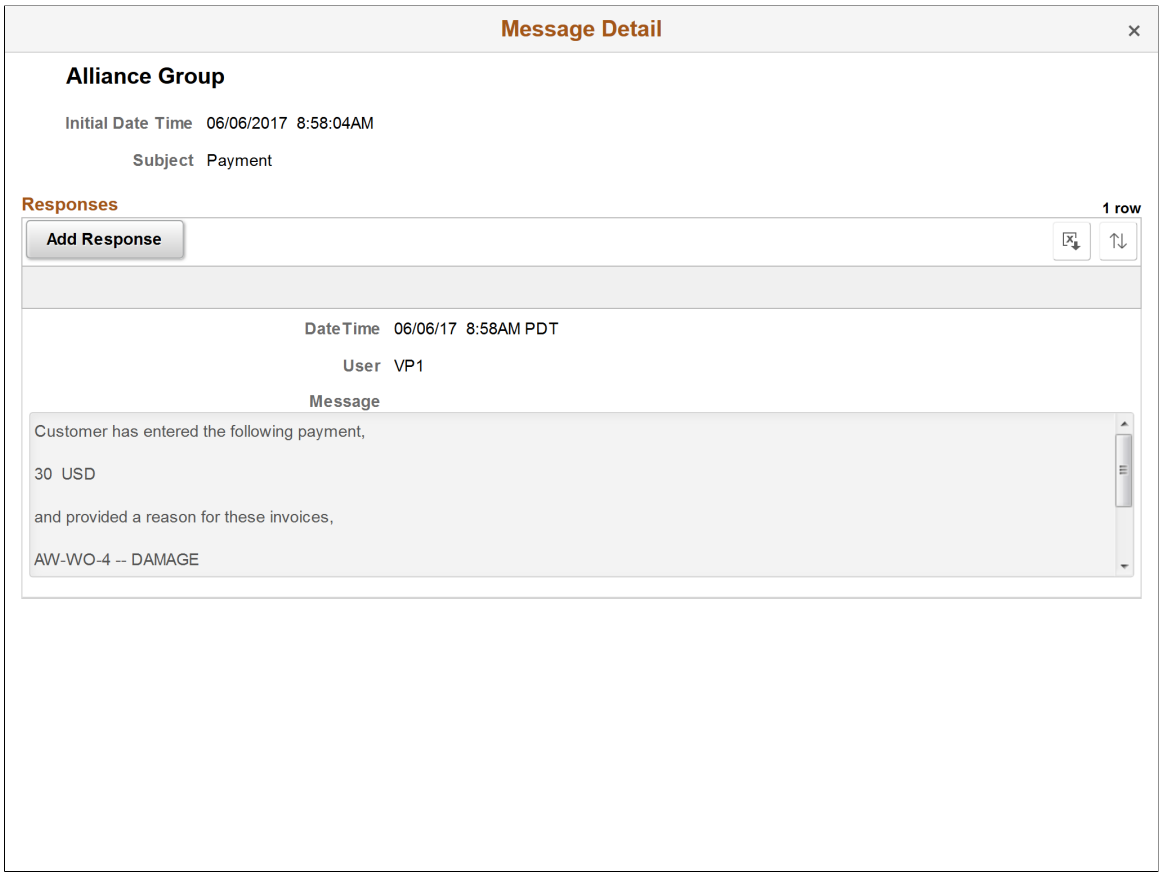
This example illustrates the fields and controls on the Message Detail page. You can find definitions for the fields and controls later on this page.



The message details include message and response timestamps, message text, and subject of the message.

Field or Control	*Description*
Add Response	Click this button to open the Add Response page (EB_ADD_RESP_SCF), where you can create a message to continue this conversation.
	Select the Sort Messages button in the small form factor design to sort messages by the message fields, such as by date, user, or message. If a sorting option has been selected, the sort button is green.

Add New Message Page

Use the Add New Message page to initiate a new conversation in the Fluid eBill Payment application.

Navigation:

Select the **Add New Message** button on the Message Detail page.

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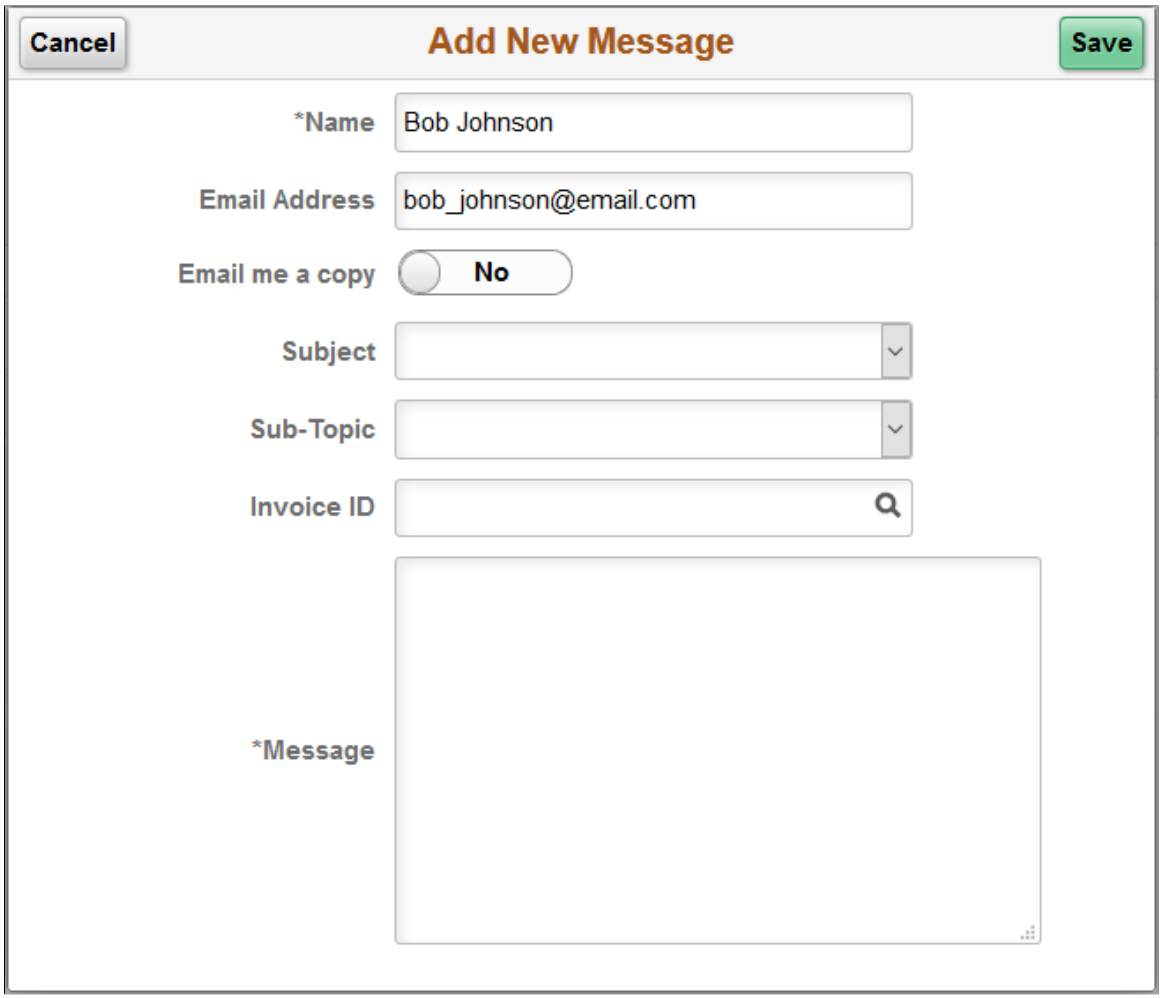
This example illustrates the fields and controls on the Add New Message page. You can find definitions for the fields and controls later on this page.



The Add New Message page for the large form factor and the small form factor displays the same fields and formatting. Only the size differs.

Your name and email address on the new message form are populated from the contact information in your account settings, but you can enter a different name and email address, if desired.

Field or Control	***Description***
Email Me a Copy	Move the switch to *Yes* to receive a copy of the email message.
Subject	Select a conversation subject from the list.
Sub-topic	Select an available subtopic from the list. The subtopics are populated based on the selected subject.
Invoice ID	Enter an invoice ID, or click the lookup prompt to reference an invoice ID in the message, if desired.

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Field or Control	*Description*
Message	Enter a message to the email recipient.

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Chapter 12

Administering Fluid eBill Payment

Managing Users in Fluid eBill Payment

This topic discusses how to manage user accounts in Fluid eBill Payment through the Administer User tile. This tile is for PeopleSoft eBill Payment administrators with appropriate permissions. The Administer User tile and related pages are only available in the large form factor (LFF) design.

This example illustrates the Administer User tile.

Using the Administer User pages, you can do the following:

- Add a new Fluid eBill Payment user account.
- Update contact and profile information for an existing Fluid eBill Payment user.
- Find an existing Fluid eBill Payment user in the system.

Pages Used to Manage Users in Fluid eBill Payments

Page Name	*Definition Name*	*Usage*
Select User Page (LFF)	EB_USER_ADMIN_FL	View a list of existing users. Add a new user or search for and update an existing user.
Select User - Filter Page	EB_USERADM_FLT_SCF	Find user accounts in the system.
Manage User Page (LFF)	EB_CNCTUSER_AD_SCF	Update user contact and profile information. Manage customers associated with a user or broker.

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Select User Page (LFF)

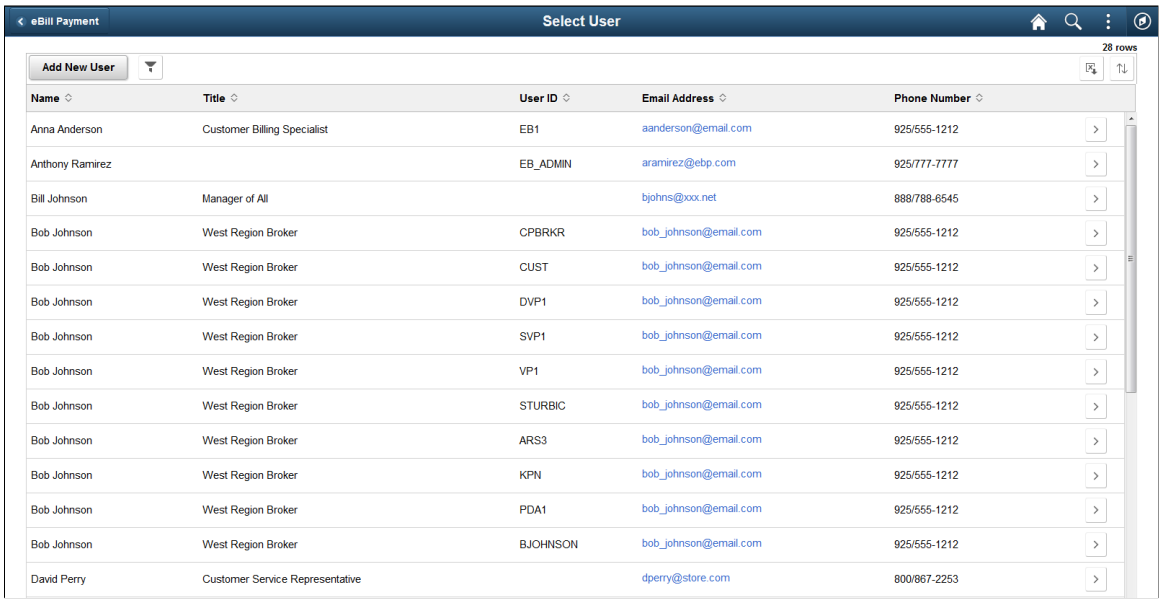
Use the Select User page to add a new user or search for and update an existing user.

This page is only available in the large form factor design.

Navigation:

Select the Administer User tile on the Fluid eBill Payment administrator's home page.

This example illustrates the fields and controls on the Select User page (LFF). You can find definitions for the fields and controls later on this page.



The list of users includes each user, title, user ID, email address, and phone number.

Field or Control	***Description***
Add New User	Select this button to add a Fluid eBill Payment user, including contact and login information.
	Select the Filter Items button to open the Filter page, where you can search for or filter users by name, user ID, email address, and phone number.
	Select the Detail button for a user to update contact and profile information on the Manage User page.

Select User - Filter Page

Use the Select User - Filter page to search for user accounts in the system.

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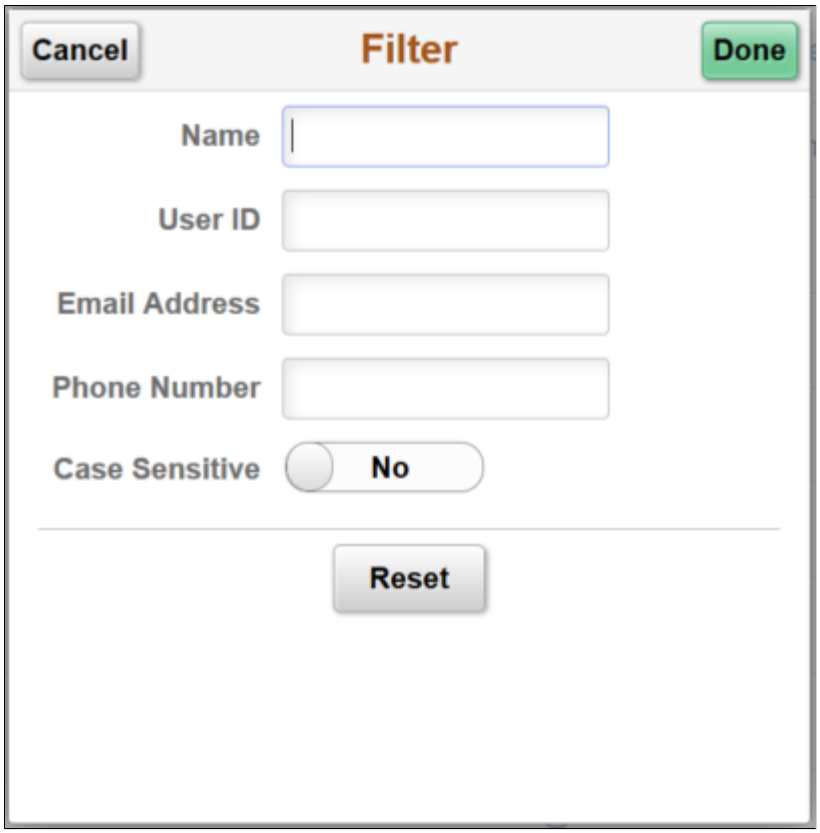
Navigation:

Select the **Filter Items** button on the Select User page.

This example illustrates the fields and controls on the Select User - Filter page.



Filter users by name or find by user ID, email address, or phone number. Select an option to make the filter parameters case sensitive.

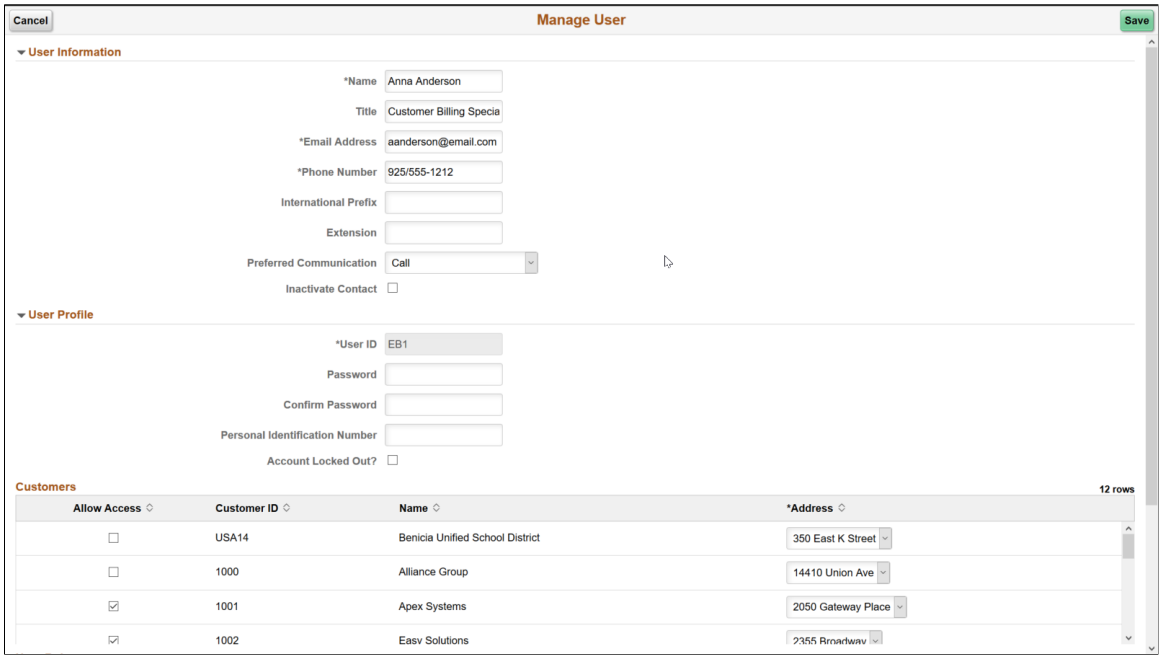
Manage User Page (LFF)

Use the Manage User page to update user contact and profile information. Manage customers associated with a user or broker.

Navigation:

- Select the Add New User button on the Select User page.
- Select the **Detail** button for a user account.

This example illustrates the fields and controls on the Manage User page (LFF).



If the customer contact or user already exists in the system, then the system displays the Manage User Profile page with the fields filled out in update mode. The Fluid eBill Payment administrator can make updates, if required. In update mode, the **User ID** field is display-only and cannot be updated.

User Information

Field or Control	*Description*
Preferred Communication	Select from the available communication options: • Call • Email & Print • Email Only • Fax • Standard Mail • XML & Print • XML only
Inactivate Contact	Select the Inactivate Contact check box to inactivate the customer contact or user.

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User Profile

The administrator must set up a user ID and password for each Fluid eBill Payment user.

Field or Control	*Description*
User ID	Displays the user ID for an existing user. Enter the user ID for a new user.
Password and **Confirm Password**	Enter a password and re-enter the same password to confirm.
Personal Identification Number	Enter a four-digit number if required for the electronic check payment method. System administrators set up payment methods including electronic check on the eBill Payment product installation pages.
Account Locked Out?	Select to lock out the account.

Customers

The Customers grid shows all Bill To customers for whom the administrator has security. The administrator selects one or more customer IDs for which the new contact should be able to access data.

User Roles

The User Roles grid shows the role assigned to the user. The prompt on role only displays roles the external administrator is allowed to grant.

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