

Xpress-pay Administration Guide

The Xpress-pay Team endeavors to educate and inform our clients how to use all available tools to ensure that vital information is readily available and your experience with ePayments is positive. To this end, this information will help you in performing common functions such as reporting, managing users and security, and more.

This guide was authored and is being provided as a courtesy of the Xpress-pay Team. It contains a synopsis of information you'll commonly need in the course of offering and accepting ePayments.

For additional assistance, please contact the Xpress Pay Support Department at (607) 753-6156. For security reasons, you may be asked questions to help verify your role.

Logging into the Xpress Pay Administrative menu

To log in to your Xpress Pay Administrative account, navigate to <https://info.xpress-pay.com/>.



On the Xpress-pay home page, go to the top right corner, hover over “Log In” and click the *Merchant Login* button to proceed. On the next page, please enter the credentials you were provided.

[Username]

[Password]

[Forgot your password?](#)

If you forgot your password, click the *Forgot Your Password* link and follow the instructions. If you have difficulty, please contact us for assistance.

LANDING PAGE – Main Menu

APEX UNITED, INC. State of Florida
APEX United

- **Reports** — Most users will only use this
- **Import Bills** — For accounts setup for Uploaded / Posted Bills
- **Add a Bill Type**
- **Add/maintain Secondary Administrators** — For Primary Administrators
- **Documentation**
- **Account Information** — Change your password here
- **Log Out**

Select a Bill Type ▼

- **Maintain Bill Type Record**
- **Maintain Interest Formula**
- **Add a Bill**
- **Remove this Bill Type** — Do not use as this as it will delete your payment type and all history
- **Bill Deletion Menu**
- **Accept behind-the-counter payments**

Depending on what privileges are assigned, you will see a Main Menu like the above. Certain features may not apply or be available as they depend on your security privilege.

Helpful Tip

Most users will only use the first menu item: Reports

We'll start with the Reports section, as this will be what is most commonly accessed.

REPORTS



There are four different reports provided for the use of tracking payments made through Xpress-pay:

Payment Detail Report by Bill Type

- Shows the details for every successful payment within the selected date range. It will include details for the parameters you collected during payment or, in the case of uploaded bills, the details you provided with the bill. It will also reflect the payers name, address, phone number, e-mail, and the date, time, and amounts associated with the payment.

Payment Detail Report by Login ID

- Similar to the above, but if you have payment types that are accepted only in your office (“Behind the Counter Payments”), use this report to sort by the login name of the staff member. This report is typically used to assist in the daily balancing process.

Outstanding Bills Report

- If you upload (post) bills to Xpress-pay, you can view a summary of outstanding bills by their type, including how much is still owed for each. Note that if you allow partial payments, this report will reflect the amount outstanding, not the original bill amount.

Payment Summary

- Shows summary-level statistics for all payments within the selected date range. This concise report shows only totals by payment type and may be filtered by data range.

Payment Detail Report by Bill Type

Once you select Payment Detail Report by Bill Type, you will see a similar screen as shown to the right.

If you are accepting both credit/debit cards and eChecks, you have the option to view that type individually or show combined by selecting "All".

Next, click on the bill type you wish to a select it for reporting. To select/deselect individual items, press and hold the CTRL key while clicking additional selections.

Select a Report
Payment Detail Report by bill type
Payment Detail Report by login ID
Outstanding Bills Report
Payment Summary

Payments to Report: All Credit/Debit Card eCheck

Select the bill types to report
Deposit (Instant Bill)
Rent (Uploaded/Posted Bill)

Select All

Beginning Date: 9/01/2017 Ending Date: 9/22/2017

Finished Get Report

Beginning Date: 03/01/2017

Ending Date: 3/10/2017

By default, the current month is selected. To change the date range to be reported, click the calendar icon. You can use the arrows to change one month at a time, or you click on the month or year and select from a dropdown. Finally, select the day to close the calendar.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Today is Fri, 10 Mar 2017

Note that both start and end dates can be specified.

Once you have specified the date range you wish to view, click **Get Report**.

Reports Export as:  

Xpress-Pay.com Payment Report
State of Florida, APEX United, Inc
Period: 9/01/2017 through 9/22/2017

Rent (Uploaded / Posted Bill)

ID	Locator 1	Locator 2	Locator 3	Last Name, First Name	Address	City, State Zip	Telephone#	Email	Bill Date	Payment Date	Payment Type	Transaction ID	Quantity	Amount	Interest	Site Fee	Total
1				Harris, Robert	6 Locust Avenue	CORTLAND, NY 13045	607-753-6156	support@systemseast.com	9/22/2017	9/22/2017 11:45:11 AM	card		0	\$300.00	\$0.00	\$9.00	
1111													1				
Test																	
Total:													\$309.00				
Bill Type Total:													\$300.00	\$0.00	\$9.00	\$309.00	
Card Total													\$300.00	\$0.00	\$0.00	\$300.00	
eCheck Total													\$0.00	\$0.00	\$0.00	\$0.00	
Grand Total													\$309.00	\$0.00	\$9.00	\$309.00	

Amount Interest Site Fee Total

Card Total eCheck Total Grand Total

\$309.00 \$0.00 \$9.00 \$309.00

\$300.00 \$0.00 \$0.00 \$300.00

\$0.00 \$0.00 \$0.00 \$0.00

\$9.00 \$0.00 \$9.00 \$9.00

\$309.00 \$0.00 \$309.00 \$309.00

Finished **Print** **Prints your report**

Please note that reporting is not designed to reconcile accounts. Its purpose is to accrue a record of successful transactions that are processed by Xpress-pay.

Credit card transactions will be combined into one deposit for each business day and will settle into your bank account within 48 hours after they are accepted.

eCheck transactions will settle based on parameters established by the payer's bank and the Federal Automated Clearing House. eChecks accepted on any given day might not be deposited together. A typical timeframe for eCheck clearance and depositing is 3-5 business days.

Outstanding Bills Report

The Outstanding Bills Report provides a summary of all the unpaid bills uploaded to the site. To run this report, select it from the reports menu and click **Get Report**.

Select a Report

- Payment Detail Report by bill type
- Payment Detail Report by login ID
- Outstanding Bills Report**
- Payment Summary

Finished Get Report

This will provide a summary of outstanding amounts per bill type as well as the number of bills outstanding and total amount due.

Payment Summary

The Payment Summary will generate the total amount collected for each bill type within a given date range. This will include amounts collected for the site fees.

Select a Report

- Payment Detail Report by bill type
- Payment Detail Report by login ID
- Outstanding Bills Report
- Payment Summary**

Payments to Report: All Credit/Debit Card eCheck

Beginning Date: 3/01/2017 Ending Date: 3/10/2017

Finished Get Report

Beginning Date: 03/01/2017 Ending Date: 3/10/2017

By default, the current month is selected. To change the date range to be reported, click the calendar icon. You can use the arrows to change one month at a time, or you click on the month or year to select from a dropdown. Finally, select the day to close the calendar.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Today is Fri, 10 Mar 2017

Note that both start and end dates can be specified.

Once you have the date range you wish to view, click **Get Report**.

Xpress-Pay.com Payment Summary Report for 9/01/2017 through 9/22/2017

	Bills	Amount	Interest	Merchant fee	Site fee	Total
State of Florida, APEX United, Inc.						
Deposit (Instant Bill)	2	\$610.00	\$0.00	\$10.50	\$2.95	\$623.45
Rent (Uploaded / Posted Bill)	1	\$300.00	\$0.00	\$9.00	\$0.00	\$309.00
Total:	3	\$910.00	\$0.00	\$19.50	\$2.95	\$932.45

A breakdown by payment type is provided for the number of bills paid, the amount, interest and penalties collected, the estimated Merchant fee collected, Site fee and total of all amounts collected.

Importing (Uploading) Bills

Xpress-pay allows you to upload bills from a file generated from your accounts receivable system. Currently acceptable file types are Excel spreadsheet (.xls, not .xlsx) and fixed-format ASCII text file.

You may upload bills as often as you like. Note that Xpress-pay will remove paid bills and it will also adjust the balance of partially paid bills that are on file, however, Xpress-pay has no knowledge of payments accepted in your office. You can synchronize the information by producing a **Payment Detail Report by Bill Type** (shown earlier in this guide) and then either manually record the payments or, if your system accepts payment files, export a file from Xpress-pay to automatically update your system. Once complete, you should export a fresh copy of your accounts receivable file and upload it to Xpress-pay.

The screenshot shows the 'Import' interface for APEX UNITED, INC. The interface includes the following elements:

- Header:** APEX UNITED, INC. logo and 'State of Florida APEX United, Inc' text.
- Bill Type:** A dropdown menu with 'Rent (Uploaded/Posted... Defined in Grid)' selected.
- Bill Date:** A field with a calendar icon and '12:01 AM' selected.
- Send Email Last Sent:** A checkbox that is currently unchecked.
- Import Options:**
 - Import Immediately
 - Import at Specified Date/Time
 - Replace all bills of this type with the uploaded bills
 - Add the uploaded bills to existing bills of this type
- Select your bills file:** A 'Choose File' button followed by the filename 'Training-guide-file.xls'.
- Email results to:** A text input field containing 'support@xpress-pay.com'.
- Buttons:** 'Cancel' and 'Import' buttons at the bottom.

Four green callout boxes provide additional information:

- Top Left:** 'Select the bill types to upload' (points to the Bill Type dropdown).
- Bottom Left:** 'Locate your Excel or Text file to upload' (points to the 'Choose File' button).
- Top Right:** 'By default, if you include an email in your uploaded file, customers will be emailed bill notification' (points to the 'Send Email Last Sent' checkbox).
- Bottom Right:** 'Email address to receive results of the import' (points to the 'Email results to:' field).

Bill Date is either defined in the uploaded bill file, or you can select the date (not shown in example above).

Add/Maintain Secondary Administrators

Passwords must be eight characters and contain at least one upper case, one lower case, one special character, and one number

Select the administrator to edit, then click Go, or leave as is to add a new user.

The first four fields are required

Email address used for a password reset

Payment types accessible to this Secondary Administrator; hold Ctrl key and click for multiple

If Secondary Administrator will be uploading bills, check here

For Secondary Administrators, check the boxes for the rights you wish to grant

If the administrator will be accepting behind the counter payments, check this box.

Don't forget to save when done!

Select an Administrator to Edit

User name *

Password *

Confirm Password *

Name *

Telephone

Email

Address1

Address2

Address3

Address4

Bill Types

- Produce Reports
- Import Bills
- Add a New Bill Type
- Add Bills
- View Documentation
- Change Account Information
- Maintain Bill Type Records
- Maintain Interest Formula
- Remove Bill Type
- Remove All Bills
- Accept behind-the-counter payments

Account Information

Account Information is used to change your username, password, email, and address.

The form is divided into three sections: Login Information, Contact Information, and Site Link. At the bottom are Cancel and Save buttons.

Login Information

Username
UsernameHere

Password ●●●●●●●●

Retype Password ●●●●●●●●

Callout: Passwords must be eight characters, at least one upper case, one lower case, one special character and one number

Contact Information

Name User Name Here

Telephone 555-555-5555

Email email@domain.com

Address 1

Address 2

Address 3

Address 4

Callout: It is important to have your correct email address in case you need to reset your password

Site Link

https://www.xpress-pay.com/default.asp?state=New+York&municipality=Demonstration

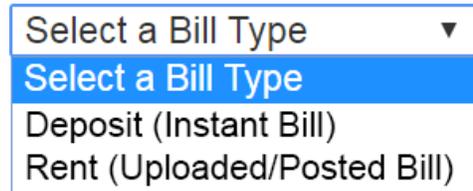
Callout: Used for web programmers. A representative will provide the necessary links

Callout: Don't forget to save when done!

Cancel **Save**

Maintain Bill Type Record

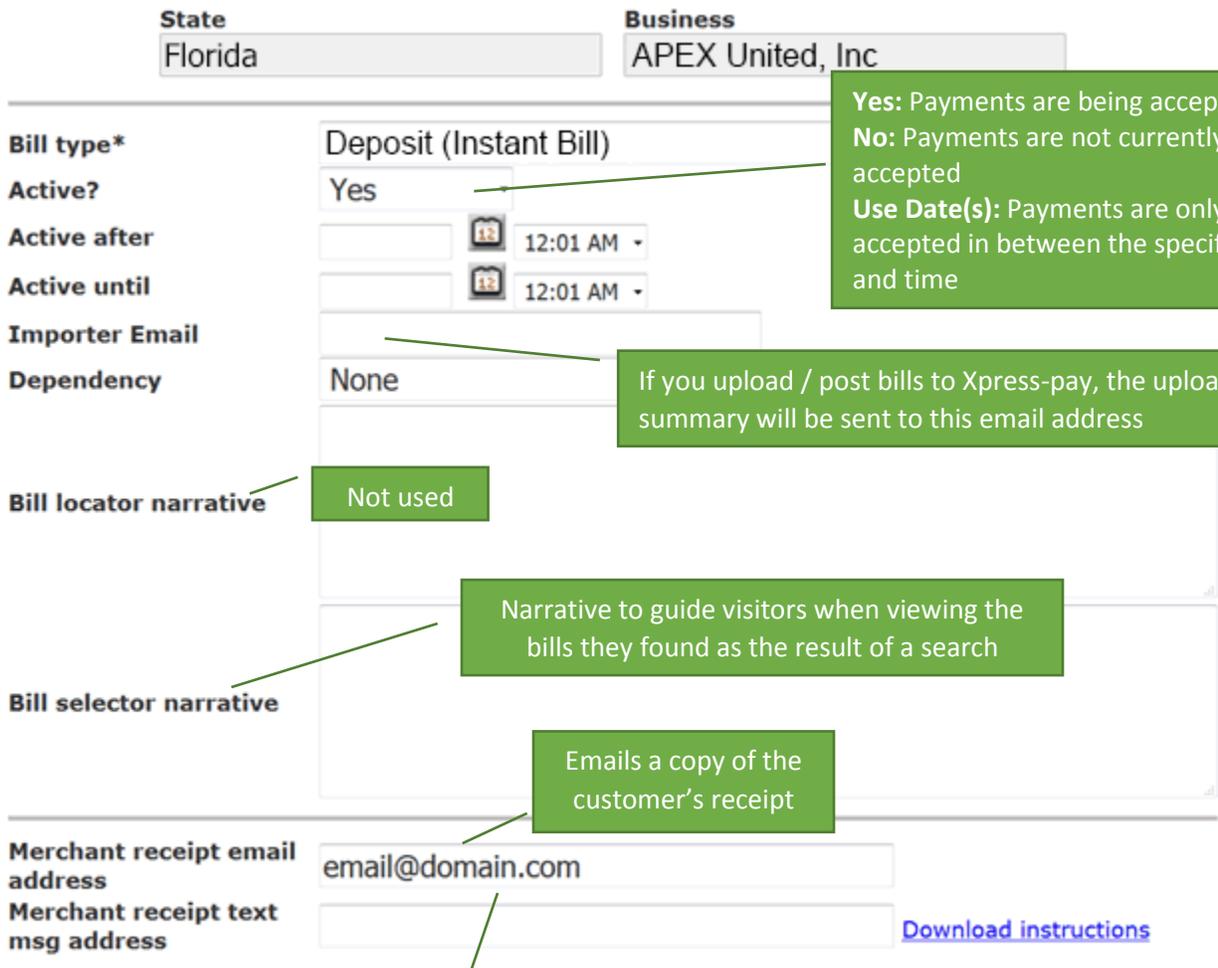
Select the bill type you wish to work with from the dropdown menu, then click on the link “Maintain Bill Type Record”.



Select a Bill Type ▼
Select a Bill Type
Deposit (Instant Bill)
Rent (Uploaded/Posted Bill)

➤ **Maintain Bill Type Record**

This will load a page like below:



State
Florida

Business
APEX United, Inc

Bill type*
Deposit (Instant Bill)

Active?
Yes

Active after
12:01 AM

Active until
12:01 AM

Importer Email

Dependency
None

Bill locator narrative
Not used

Bill selector narrative

Merchant receipt email address
email@domain.com

Merchant receipt text msg address

[Download instructions](#)

Yes: Payments are being accepted
No: Payments are not currently being accepted
Use Date(s): Payments are only to be accepted in between the specified date and time

If you upload / post bills to Xpress-pay, the upload summary will be sent to this email address

Not used

Narrative to guide visitors when viewing the bills they found as the result of a search

Emails a copy of the customer's receipt

Sends a text message to this wireless number and carrier when a customer pays; Note: Do not enter only a wireless number - see Instructions

Cancel

Save

Don't forget to save when done!

Add/Email a Bill (Instant Invoice)

Instant Invoices are perfect for deposits or payments to any type of firm such as services and facilities, property management, insurance, towing, limousine, and a host of others.

First, log into the Administrative menu, select the payment type, and click Add/Email a Bill. What's next depends upon the payment type's structure:

- Posted bills (EBPP): Posts a bill for the consumer to locate and pay. If an email address is provided, an Instant Invoice will also be sent.
- Instant payments: Emails an Instant Invoice requesting a deposit or payment for any purpose.

The process is simple and immediate. At the Administrative menu, select a payment type, Click *Add/Email a Bill*, and complete the form...

Xpress-pay
Your Partner in ePayments

Welcome: Demonstration Administrator
Main Menu Logout

Add Bill

What to do
Fill in all required information and click Add a bill/Email an invoice

360° PAINTING Demonstration Firm, Inc.
360 Painting (demo)

Note: This function will email a bill and payment link to the address provided.

Customer name: Robert Harris *

Service address: 12 Randall Avenue *

Job description: 1st floor color change

Bill Date: 1/24/2018 *

Amount: 700 *

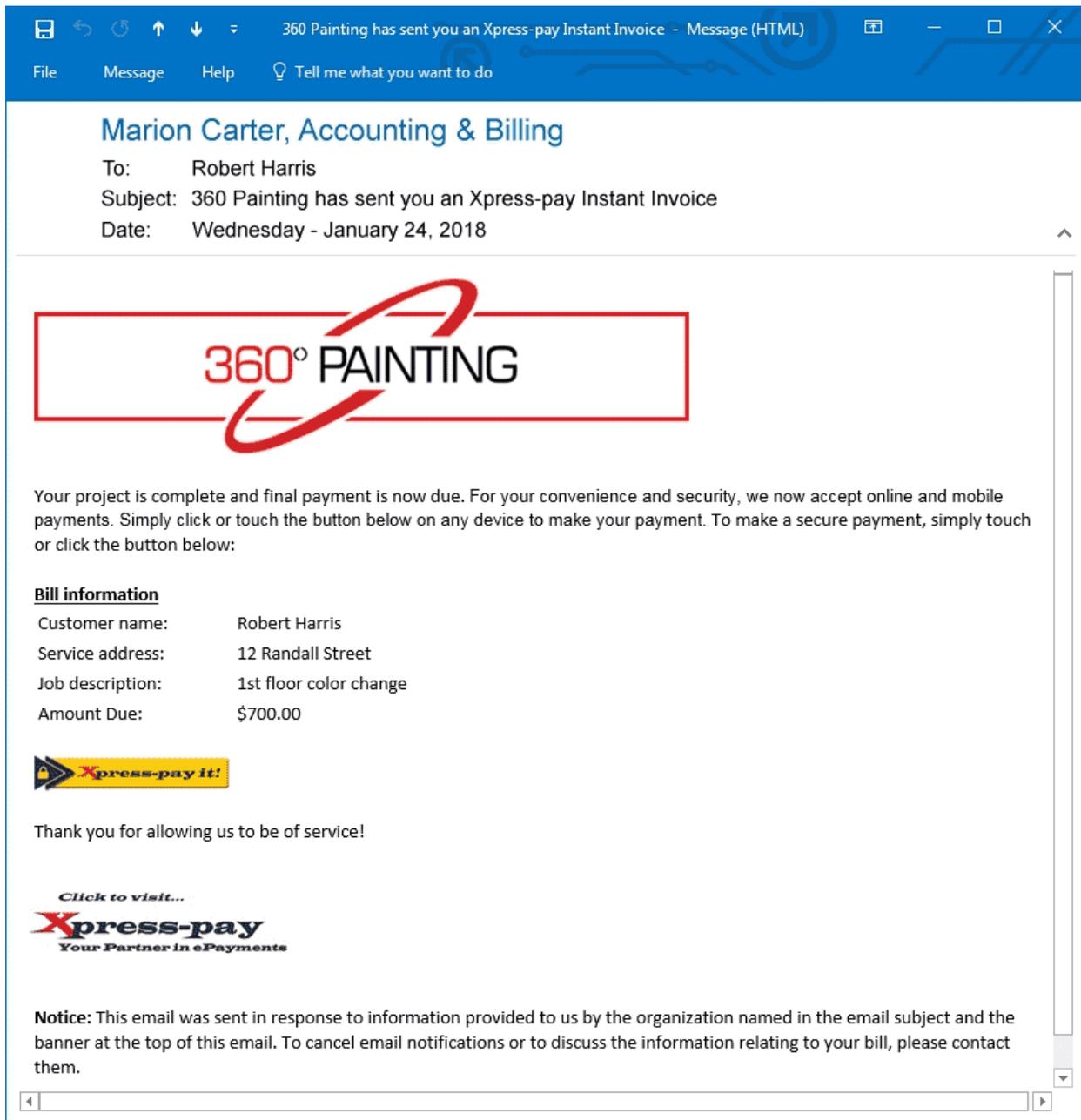
Email: rharris@gmail.com *

* indicates a required field

Provide an email address to send an Instant Invoice (not required if posting a bill)

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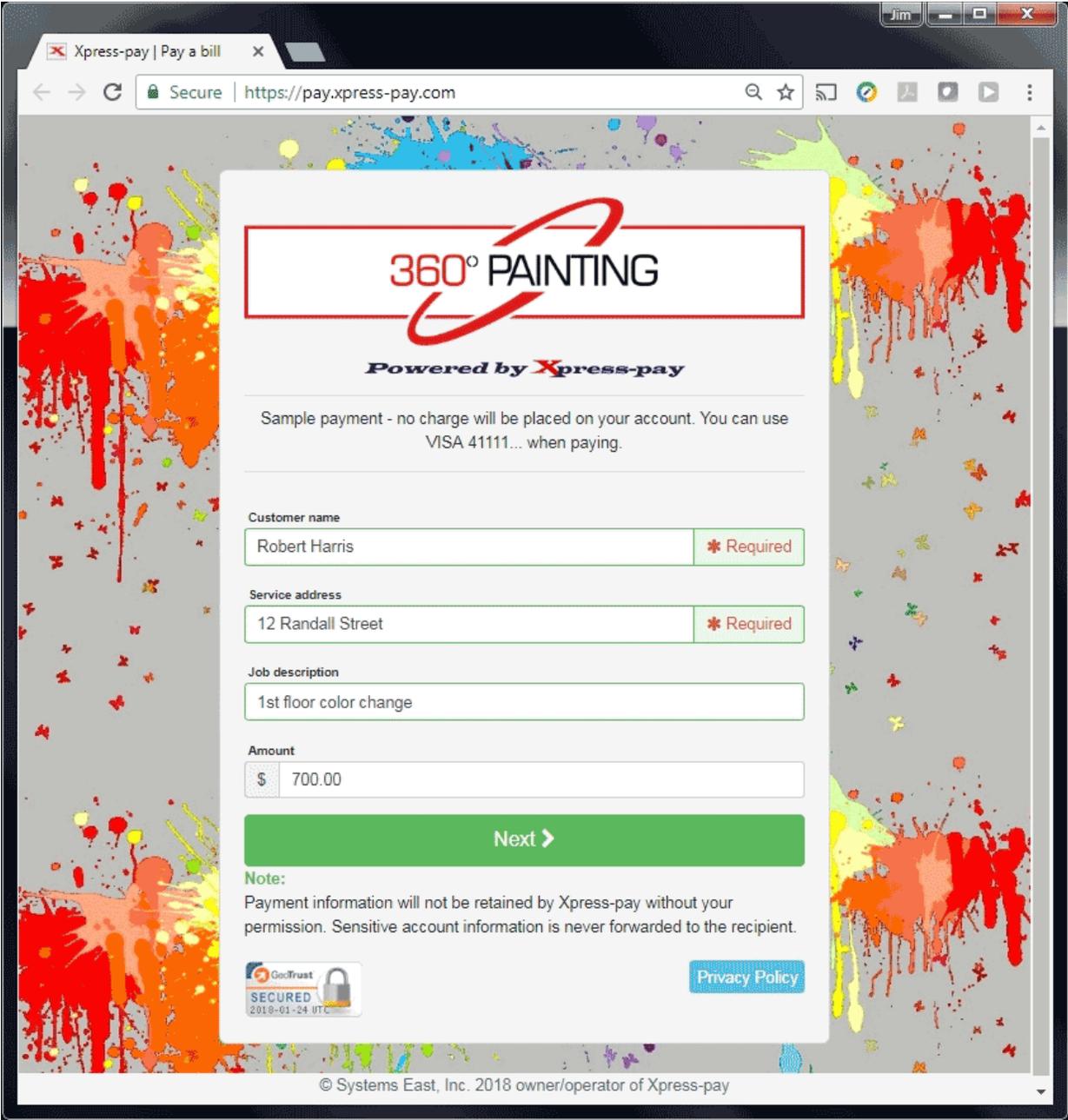
The recipient simply clicks the button to Xpress-pay it!...



The screenshot shows an email interface with a blue header bar. The title bar reads "360 Painting has sent you an Xpress-pay Instant Invoice - Message (HTML)". The email content includes the sender "Marion Carter, Accounting & Billing", recipient "Robert Harris", subject "360 Painting has sent you an Xpress-pay Instant Invoice", and date "Wednesday - January 24, 2018". A large red-bordered box contains the "360° PAINTING" logo. Below the logo, a paragraph states: "Your project is complete and final payment is now due. For your convenience and security, we now accept online and mobile payments. Simply click or touch the button below on any device to make your payment. To make a secure payment, simply touch or click the button below:". A "Bill information" section lists: Customer name: Robert Harris; Service address: 12 Randall Street; Job description: 1st floor color change; Amount Due: \$700.00. A yellow button with a padlock icon and the text "Xpress-pay it!" is displayed. Below the button, it says "Thank you for allowing us to be of service!". At the bottom, there is a "Click to visit..." link to the "Xpress-pay Your Partner in ePayments" logo. A "Notice" at the bottom states: "Notice: This email was sent in response to information provided to us by the organization named in the email subject and the banner at the top of this email. To cancel email notifications or to discuss the information relating to your bill, please contact them."

The branded payment is launched as shown on the next page.

When your customer clicks or touches the button to “Xpress-pay it!”, they are presented with your branded payment screen along with the information you provided. Notice the industry-specific background as well, another Xpress-pay feature to help promote your brand:



Instant Invoicing is simple, has widespread applicability, and encourages prompt payment. For reservations requiring a deposit, your customers will appreciate the ability to instantly book rather than hoping their mailed check arrives first.

Bill Deletion Menu (Removing Imported Bills)

Delete all bills with type of Rent (Uploaded/Posted Bill)

Delete bills where Invoice number ▼ =

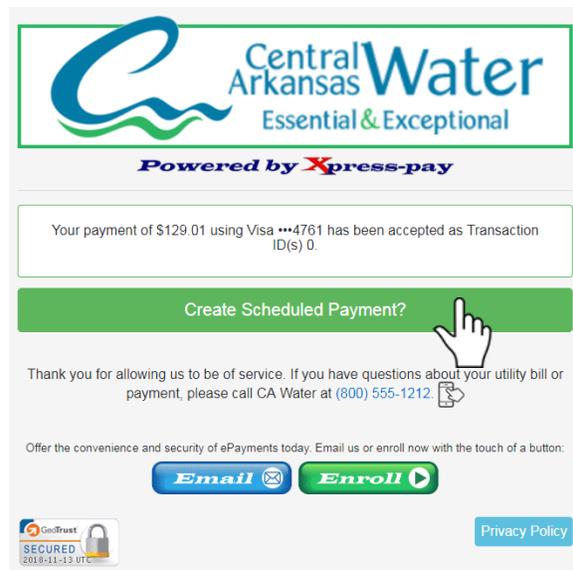


You can remove all bills for the selected bill type or delete bills based on specific criteria. For the latter, select one of the locator fields and input the exact information to be used as criteria to find and remove bills. In the above example, a specific invoice can be deleted.

Scheduled/Recurring Payments (AutoPay)

Upon receiving the on-screen receipt after payment, visitors have the ability to schedule future payments if you allow them to do so. This option must be enabled for the option to be presented. If it is, the option will be presented as shown to the right.

Scheduled payments can occur on a weekly, monthly, bimonthly, quarterly, annually, or semiannual basis. You limit the choices we present.



In addition to creating a scheduled payment, visitors can also use the Xpress-pay Dashboard to view or update their credit/debit cards, bank account information, scheduled payments, or addresses. The dashboard is available at <https://dashboard.xpress-pay.com>.

After clicking the *Create Scheduled Payment?* button on the receipt, the visitor will see the form to the right. Where possible, the form will be prefilled with information provided during their payment.

A nickname must be assigned to the scheduled payment such as “Monthly utility bill”. They then continue with the form, noting that some of the fields will vary based on the options made available during configuration. In all cases, a payment method and date of first automatic payment will be required. The number of payments can be set to a specific number or “Until I cancel”.

- Add a payment method, e.g. credit/debit card or bank account information if merchant accepts eChecks.**
- Select the schedule for payments.**
- Select the date for the first automatic payment.**
- Select how many payments you want to recur.**

An example of a completed form is shown to the right.

Once the configuration is saved, a confirmation page will be displayed as shown on the image below. An option to view the Xpress-pay Dashboard is included as well.

The confirmation page summarizes the scheduled payment and provides an opportunity to view the Dashboard. There, visitors can add payment methods, make changes to or cancel their recurring payment profiles, maintain the list of addresses associated with the account, or view historical payment activity associated with the email address used for the dashboard account.

Profile Details

Scheduled Payment Nickname	Utility Bill
Schedule	Monthly
Date of next automatic payment	11/30/2018
Business	Demonstration
Bill Type	Utility bills
Total Number of Payments	Until I cancel
Maximum amount to pay	\$0.00

View Dashboard >

The Xpress-pay Dashboard

Xpress-pay offers the ability to create a digital wallet account. In addition to securely storing your credit cards, your customers can view information about past payments, add and remove credit cards or bank accounts, and change the number of payments or cancel your recurring payment.

Xpress-pay
\$ Payment Methods
📅 Scheduled Payments
🏠 Addresses
📄 Payment History
👤 Logout (email@maildomain.com)

Payment Methods
Add Payment Method

Credit/Debit Cards

Showing 1 of 1 items.

Actions	Payment Method Nickname	Card Type	Card #	Card Expiration	Name / Email	Address
👁️ ✎️ 🗑️		Visa	****4761	8/2018	John Smith email@maildomain.com	

Bank Accounts

Showing 1-1 of 1 item.

Actions	Payment Method Nickname	Account Type	Routing Number	Account Number	Name / Email	Address
👁️ ✎️ 🗑️		Checking	022000046	****2082	Systems East email@maildomain.com	

The default screen is the *Payment Methods* page, which allows you to add new credit/debit cards or bank accounts for your ACH/eCheck payments. In addition to adding items, you can view, edit, or delete them using the icons shown to the right.



Xpress-pay \$ Payment Methods Scheduled Payments Addresses Payment History Logout (email@maildomain.com)

Scheduled Payment

Showing 1-1 of 1 item.

Actions	Payment Nickname	Next Payment	Schedule	Payments Remaining	Amount
	Utility Bill	11/30/2018	Monthly	Until I cancel	Varies

Editing scheduled payments in the Xpress-pay Dashboard is accomplished with the edit button (pencil icon) and will display a form similar to this:



Profile Details

Scheduled Payment Nickname
Utility Bill

Select Bill Type

State
New York

Business
Demonstration

Bill Type
Utility bills

Selected Bill Type Details

Account #
123456

Last name
John Doe

Unique Bill Identifier
Test

Payment Details

Payment Method
Live Test Payment - Visa - 2/2023 - ****4761

Schedule
Monthly

Date of next automatic payment
11/30/2018

Total Number of Payments
Until I cancel

Change your payment method, e.g. credit/debit card or bank account information if merchant accepts eChecks.

Change type of schedule (if available).

Change date when payment is made.

Change how many payments or made or you can cancel by setting it to "Inactive".

< Cancel
Update >

Complete all information and click *Update* to save. A scheduled payment will be processed for the day as indicated on the form.

Once saved, the scheduled payment will show up on the dashboard's *Scheduled Payments* page:

Showing 1-1 of 1 item.

Actions	Scheduled Payment Nickname	Start Date	Schedule	Day	Total Number of Payments	Payment Amount	Maximum Payment Amount
  	Oct Payment to APEX United, Inc	10/25/2017	Monthly	25th	1	Varies	\$100.00

Xpress-pay \$ Payment Methods  Scheduled Payments  **Addresses**  Payment History  Logout (email@maildomain.com)

Addresses [Add Address](#)

My Addresses

Showing 1-1 of 1 item.

Actions	Full Name	Street Address	City	State	Zip or Postal Code	Phone Number
  	John Smith	1 Maple Ave.	Yourtown	FL	32118	(607) 753-6156

The *Addresses* tab allows visitors to store addresses associated with their account, such as billing addresses for credit/debit cards, statement addresses for bank accounts, and shipping addresses. Once an address is stored, it can be used for any number of payment instruments, thus saving time.

Xpress-pay \$ Payment Methods  Scheduled Payments  Addresses  **Payment History**  Logout (email@maildomain.com)

Payments

Payment History

Showing 1-10 of 356 items.

Actions	Transaction ID	Date	Total	Business	Payment Method	Description
	0	9/27/2017 2:59:02 PM	\$103.00	APEX United, Inc	card	Rent (Uploaded/Posted Bill), 11111, Bob Smith
	0	9/27/2017 2:53:36 PM	\$103.00	APEX United, Inc	card	Rent (Uploaded/Posted Bill), 11111, Bob Smith

« 1 2 3 4 5 6 7 8 9 10 » 25 ▾

[← Back to Payment Methods](#)

The *Payment History* tab displays past payments associated with the current user's email address. Information includes payee, payment date, and payment amount and type.

In addition to these tools, Xpress-pay offers support to all our clients, their customers and users of our software.

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