

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.

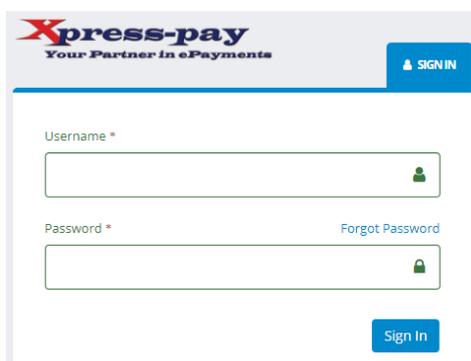
For additional assistance, please contact the Xpress Pay Support Department at (607) 753-6156. For security reasons, you will be asked questions to verify your role.

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 on *Log In* and click the *Merchant Login* button to proceed. On the next page, please enter the credentials you were provided.

The image shows the login page of the Xpress-pay website. At the top left is the Xpress-pay logo. In the top right corner, there is a blue button labeled 'SIGN IN'. Below the logo, there are two input fields: 'Username *' and 'Password *'. The 'Password *' field has a blue link labeled 'Forgot Password' next to it. At the bottom right of the form, there is a blue button labeled 'Sign In'.

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

DASHBOARD – Main Menu

Most will only use this

Quick Links

- My Profile
- My Organization
- Payment Types
- Import Bills
- Instant Invoice
- Reports
- Training Guides

Reports

- Payment Summary by Organization
- Payment Detail by Payment Type
- Payment Detail by Payment Type (Date & Time Selectivity)
- Outstanding Bills Report
- Outstanding Bills Detail Report

Uploaded Bills
7

Payments
1

Bill Total
\$3,128.50

Payment Amount
\$9,000.00

Payments
Below are the last 10 payments received

Search for a payment...
-- Search by -- Search

Bill Type	Payment Date	Paid	
Rental Invoice	4/30/2020 10:29am	9256.90	

Payments
Below is a chart of payments over the past 14 days

Payment Amount

Depending on what privileges are assigned, you will see a Dashboard 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 Reports Function.

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

REPORTS

There are several different reports available for tracking payments. Here are the most popular:



Payment Summary by Organization

- 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 by Payment 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 information you provided with the bill. It will also reflect the payer's name, address, phone number, email, payment date and time, and amounts associated with the payment.

Payment Detail by Payment Type (Date & Time Selectivity)

- Similar to the above, but with payments sorted by date and time.

Outstanding Bills Report

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

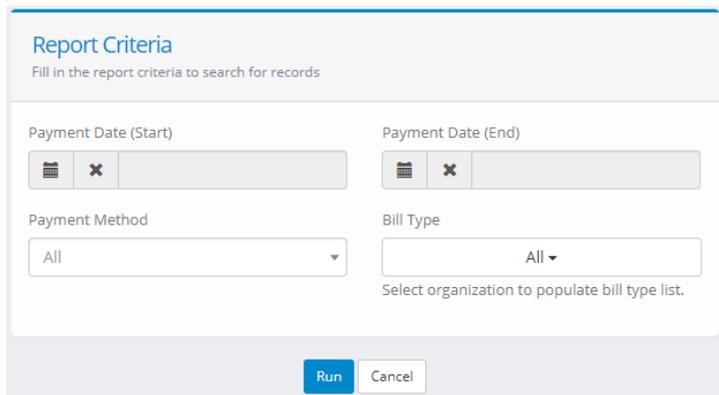
Outstanding Bills Detail Report

- Shows the detail for all outstanding bills. The report is concise, showing only totals by payment type.

Payment Detail by Payment Type

Upon selecting this report, a screen similar to the one on at the right will be shown.

You can filter the report based on certain criteria. Here, a choice for payment methods is provided. Click the down-arrow to reveal the available options or select *All* to omit filtering by this criteria.

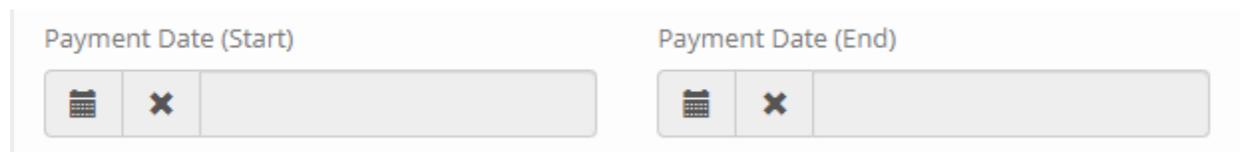


The screenshot shows a 'Report Criteria' form with the following fields:

- Payment Date (Start)**: A date input field with a calendar icon and a clear (X) button.
- Payment Date (End)**: A date input field with a calendar icon and a clear (X) button.
- Payment Method**: A dropdown menu currently set to 'All'.
- Bill Type**: A dropdown menu currently set to 'All', with a note below it: 'Select organization to populate bill type list.'

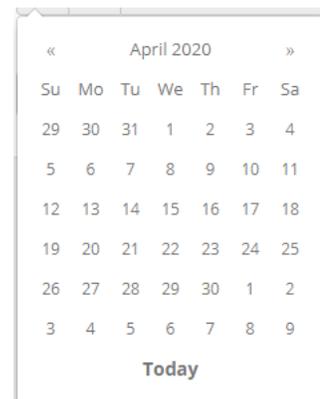
At the bottom of the form are two buttons: 'Run' (in blue) and 'Cancel'.

Next, choose the payment types you wish to select. If you want to select all payment types keep the selection at all, or to select/deselect individual items, place a check mark in the box next to the payment type from the dropdown menu.



This image shows a close-up of the 'Payment Date (Start)' and 'Payment Date (End)' fields. Each field contains a calendar icon, a clear (X) button, and an empty text input area.

Next, select the date range to report. 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/year and select from a dropdown. Finally, select the day to close the calendar.



Note that both start and end dates can be specified.

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

Payment Detail by Payment Type

Report Results
Below are the results of your search criteria.

Online Payment Report
Period: 04/01/2020 through 04/30/2020

Rental Invoice (ND - Drift Prairie Rentals)

Payment Details	Payer	Bill Date	Transaction Details	Amount	Interest	Site Fee	Total
Invoice #: 987878 Customer name: Tony Stark	Payment, Test cburling@systemseast.com, 1234 Main St BEVERLY HILLS, 90210	2020-04-30	Payment Date: 04/30/2020 10:29:53 AM Payment Type: Credit/Debit Card Transaction ID: 0 Quantity: 1	9,000.00	0.00	256.90	9,256.90
Amount Total							9,000.00
Interest Total							0.00
Site Fee Total							256.90
Bill Type Total							9,256.90

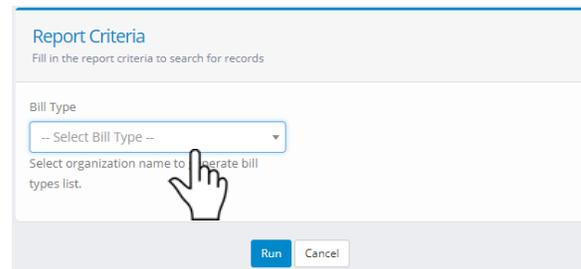
Please note that reporting is not designed to reconcile accounts. Its purpose is to accrue a record of successful transactions that are processed by Xpress-pay.

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

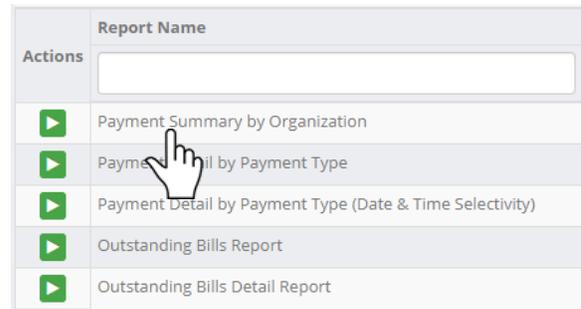
The Outstanding Bills Report provides a summary of all the unpaid bills uploaded to the site. To run this report, select it from the Reports menu, then select the payment type(s) you want to include.



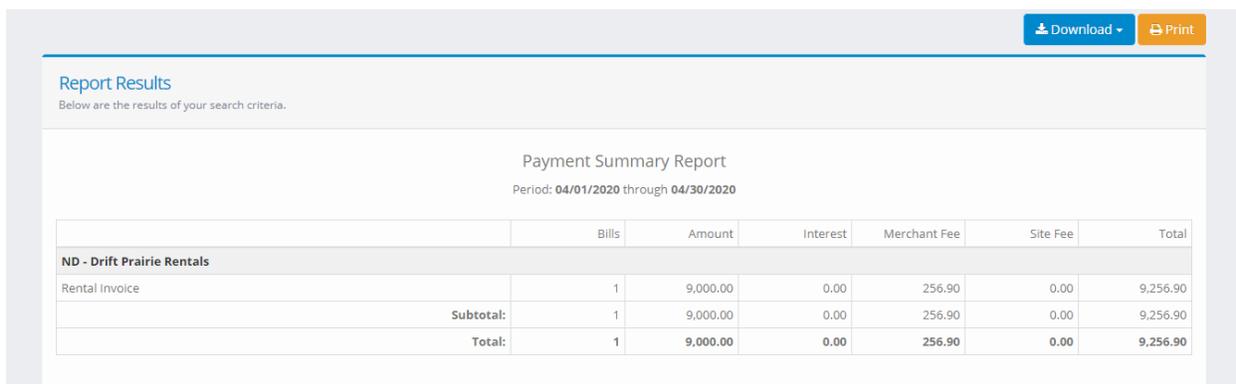
This will provide a summary of outstanding amounts per payment type, the number of bills outstanding, and total due.

Payment Summary by Organization

The Payment Summary will show the total amount collected for each payment type within a given date range. This will include amounts collected for site fees, if any.



To change the date range, 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. Note that both start and end dates can be specified. Click *Run* to produce the report.



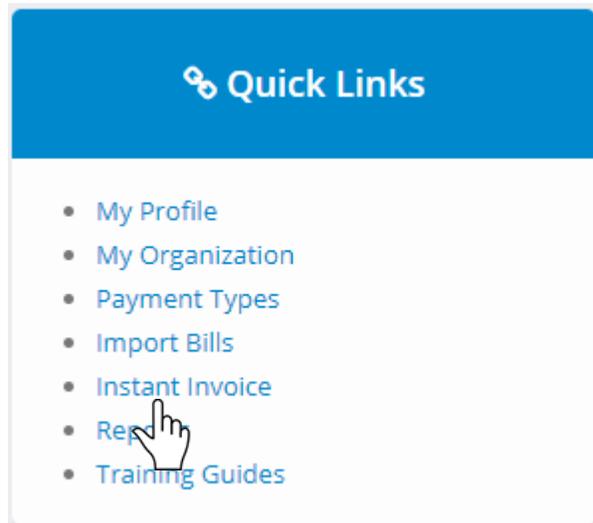
	Bills	Amount	Interest	Merchant Fee	Site Fee	Total
ND - Drift Prairie Rentals						
Rental Invoice	1	9,000.00	0.00	256.90	0.00	9,256.90
Subtotal:	1	9,000.00	0.00	256.90	0.00	9,256.90
Total:	1	9,000.00	0.00	256.90	0.00	9,256.90

A summary by payment type is provided, including the number of bills paid, the amount, interest and penalties collected, the estimated merchant fee collected, site fee, and the total collected for the payment type.

Importing (Uploading) Bills

Xpress-pay allows you to present billing information by uploading a file of bills from your accounts receivable system. The file can be in Excel (.xls, or.xlsx), .csv or tab-delimited format, or a fixed-format ASCII text.

You can upload bills as often as you like. Note that Xpress-pay will reduce the balance of partially paid bills and remove paid bills, but it has no knowledge of payments accepted in your office. To record payments made through Xpress-pay, produce a *Payment Detail Report by Payment Type* (shown earlier) and either manually record the payments or, if your system accepts payment files, download a file and import it into your system. Once complete, you should export a fresh copy of your accounts receivable file and upload it to Xpress-pay.



If you include an email in your uploaded file, customers will be emailed a bill notification if you select yes send email.

Select payment types to upload

Bills can be available immediately or hidden until a later date & time

Locate the file you wish to upload

Email address to receive the import results

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

Add/Maintain Secondary Administrators

The first five fields are required

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

Email address used for a password reset

Create Cancel

Click Create when done

The 'User Details' form contains the following fields: Name *, Address Line 1, Phone *, Address Line 2, Email *, City, Username *, State (dropdown), Zip, Password *, and Password Repeat *. The form has a 'Create' button and a 'Cancel' button.

User Access

Fill in user access in the fields below

Role * -- Select Role --

Permissions All Permissions ▾

Leave blank for access to all permissions

Bill Types All Bill Types ▾

Leave blank for access to all bill types

Put a check mark next to the bills types the user can see from the drop-down menu, leave blank for access to all payment types.

Select permissions by checking the boxes for the ones you wish to grant.

The 'User Access' form contains the following fields: Role * (dropdown), Permissions (dropdown), Bill Types (dropdown), and a checkbox area for permissions. The form has a 'Create' button and a 'Cancel' button.

My Profile

My profile is used to change your username, password, email, and address. It is accessed by clicking your name in the upper right corner or by selecting *My Profile* in the *QuickLinks* menu on the dashboard.

Organization: Drift Prairie Rentals | Charlotte James Organization

Users

Showing 1 - 1 of 1 users

Actions	State	Organizations	Username	Email	Role	Permissions
	Any State	Drift Prairie Rentals	driftprairierentals	driftprairierentals@anywhere.com	Organization	Full Access

Showing 1 - 1 of 1 users

Organization: Drift Prairie Rentals | Charlotte James Organization

Update User - driftprairierentals

Users / driftprairierentals / Update

User Details

Fill in user details in the field below

Name * Charlotte James | Address Line 1 | Phone * 6077536156 | Address Line 2 | Email * driftprairierentals@anywhere.com | City | Username * driftprairierentals | State -- Select State -- | Zip | Change Password

User Access

Fill in user access in the fields below

Role * Organization * | Permissions All Permissions | Bill Types All Bill Types | Leave blank for access to all bill types

Update Cancel

Maintain Payment type Record

Click *Payment Types* from the menu bar, then select the payment type you wish to edit using the blue pencil icon.

#	Actions	PK	Bill Type	Visibility	Active
1		11059	Rental Deposit	Public	Yes
2		11058	Rental Insurance	Public	Yes
3		11057	Rental Fees	Public	Yes
4		11056	Rental Invoice	Public	Yes

To update a Payment type, click the blue pencil



Caution: This icon will delete your payment type and all history

Update Bill Type: Rental Deposit | Bill Types / Rental Deposit / Update



Sends a text message to this wireless number upon payment
Note: See Instructions

Maintain Bill Type

★ Main | Dropdown Values | Interest | Global aXcess

State: North Dakota | Organization: Drift Prairie Rentals | Bill Type: Rental Deposit | Industry: Property Management

Active: Yes | Dependency: None | Merchant receipt email address: | Merchant receipt text msg address:

Importer Email:

Update

Click *Update* when done

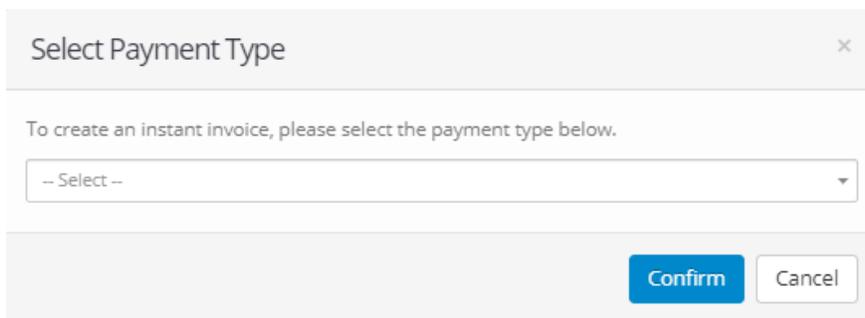
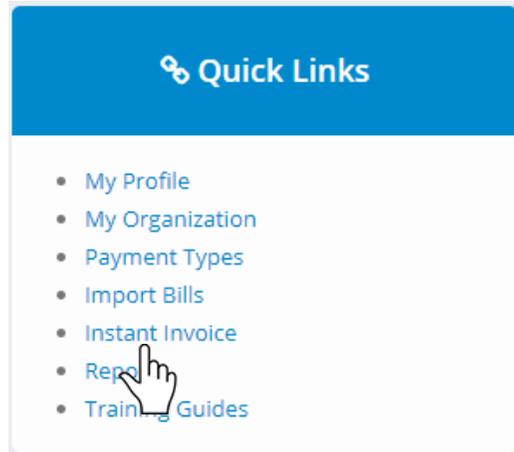
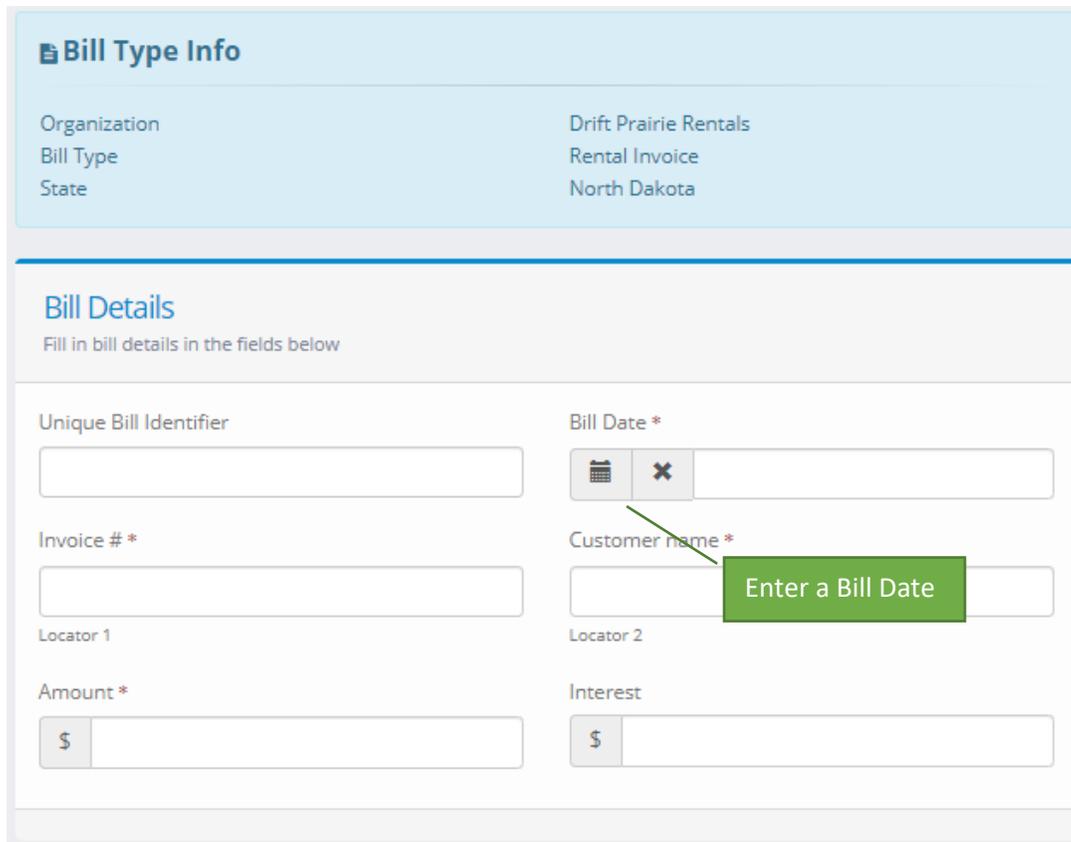
Yes: Payments are being accepted
No: Payments are not being accepted
Use Date(s): Payments are accepted only during the specified dates and time

A summary of your bill uploads will be sent to this address

Add/Email a Bill (Instant Invoice)

Instant Invoices are perfect for quick acceptance of payments for any purpose such as services, deposits, applications fees, etc.

From the Quick Links Menu, select the Instant Invoice, then select the payment type:

A screenshot of a 'Select Payment Type' dialog box. The dialog has a title bar with a close button (X). Below the title bar is a message: 'To create an instant invoice, please select the payment type below.' Below the message is a dropdown menu with the text '-- Select --'. At the bottom right of the dialog are two buttons: 'Confirm' and 'Cancel'.A screenshot of a form with two main sections. The first section is titled 'Bill Type Info' and contains a table with the following information:

Organization	Drift Prairie Rentals
Bill Type	Rental Invoice
State	North Dakota

The second section is titled 'Bill Details' and contains the instruction 'Fill in bill details in the fields below'. It has several input fields:

- Unique Bill Identifier: A text input field.
- Invoice # *: A text input field.
- Locator 1: A text input field.
- Amount *: A text input field with a '\$' symbol on the left.
- Bill Date *: A date picker field with a calendar icon and a close button (X).
- Customer name *: A text input field with a green callout box that says 'Enter a Bill Date' pointing to it.
- Locator 2: A text input field.
- Interest: A text input field with a '\$' symbol on the left.

Email / Mobile Phone Details

Include an email address and/or mobile phone to deliver an immediate notification.

Email Address - one email address per line

Email Opening Text

A new bill has been uploaded to Xpress-pay and is now available for payment. To make a secure payment, simply touch or click the button below.

Email Closing Text

Thank you for allowing us to be of service!

Mobile Phone - valid 10 digit phone number

Text Message

To Xpress-pay your bill to Drift Prairie Rentals (Rental Invoice) touch link below:

[Send](#) [Cancel](#)

Provide an email address to email an Instant Invoice.

Provide a mobile phone number to send a notification by text message.

Then, to Xpress-pay the bill, the recipient then simply clicks the button in the email or the link in the text message:



Tue 4/28/2020 11:11 AM

noreply@systemseast.com

Anybusiness has uploaded your bill to Xpress-pay

To Jane Doe



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.

Bill information

Payment Type: Rental Invoice

Data field 1

Data field 2

Bill Amount: \$25.00

Interest: \$0.05

Total Due: \$25.05



Thank you for allowing us to be of service!

Please Note: 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.



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

Instant Invoicing is simple, has widespread applicability, and encourages prompt payment. For example, reservations can be secured immediately, providing peace of mind for the customer and the business. In the event of a service cancellation, immediate payment provides a quick remedy. Dispatchers can secure payment for tow trucks before sending a truck and employee. The uses are endless.

Bill Deletion Menu (removing uploaded bills)

#	Actions	PK	Bill Type	Visibility	Active
1		11059	Rental Deposit	Public	Yes
2		11058	Rental Insurance	Public	Yes
3		11057	Rental Fees	Public	Yes
4		11056	Rental Invoice	Public	Yes

You can remove one or all bills for the selected payment type or delete bills based on specific criteria. For the latter, select one of the locator fields and provide the

exact information to be used as criteria to locate and remove matching bills. In the above example, a specific invoice can be deleted.

Scheduled/Recurring Payments (AutoPay)

You can allow consumers to schedule future payments upon display of the on-screen receipt after payment. Simply request that our team enable this option. If enabled, the option will be presented as shown to the right.

Scheduled payments can occur on a variety of frequencies (weekly, monthly, annually, etc.). Which are allowed is determined by your settings.

Once an Xpress-pay accounts is created and whether or not they have scheduled any payments, visitors can use the Xpress-pay Dashboard to view or update their credit/debit cards, bank accounts, billing addresses, and scheduled payments (if any). The dashboard is available at <https://dashboard.xpress-pay.com>.

Drift Prairie Rentals
Powered by **Xpress-pay**

Your payment of \$103.25 using Visa ****1111 has been accepted as Transaction ID(s) 0 on 05/04/2020 at 3:56:50 PM. A receipt has been sent to cburling@systemseast.com.

Payment	Details	Amount
Rental Invoice	Bill Date: 05/04/2020 Invoice #: 123456 Customer name: Clint Barton	Amount: \$100.00
	Subtotal:	\$100.00
	Site fee:	\$3.25
	Payment total:	\$103.25

Create Scheduled Payment?

Offer the convenience and security of ePayments today. Learn more or enroll with a click:

[Learn more](#) [Enroll](#)

[Print](#) [Privacy Policy](#)

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

A nickname such as *Monthly utility bill* must be assigned to the scheduled payment. They may 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 the 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 are to be made.

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

Once saved, a confirmation page will be displayed as shown in the lower right. An option to view the Xpress-pay Dashboard is included as well.

The confirmation page summarizes the scheduled payment and connects the visitor to the Xpress-pay Dashboard. Here, visitors can add payment methods, change or cancel their recurring payment schedules, maintain the list of billing or shipping addresses, and view payment history.

The Xpress-pay Dashboard

Xpress-pay offers a secure digital wallet feature. In addition to securely storing credit cards, visitors can view their payment history, add, change, or remove credit cards or bank accounts, change the number of scheduled payments or cancel a recurring payment plan.

Payment Details

Payment Method

Schedule

Date of first automatic payment
 ✕ 📅

Total Number of Payments

[Save Scheduled Payment >](#)

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 >](#)

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	****1111	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	123456789	****2082	Systems East email@maildomain.com	

The default screen is the *Payment Methods* page, which allows consumers to add new credit/debit cards or bank accounts for eCheck payments. In addition to adding items, they 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). The Profile Maintenance form will be displayed:



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
Payment - Visa - 02/2023 - ****1111

Schedule
Monthly

Date of next automatic payment
11/14/2020

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 the number of future payments or deactivate the schedule.

< Cancel
Update >

Complete all information and click *Update* to save. A scheduled payment will be processed beginning with the *Date of Next Automatic Payment*.

Once saved, the scheduled payment will appear on the *Scheduled Payments* tab of the dashboard:

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 multiple addresses with their account, such as billing addresses for credit/debit cards, statement addresses for bank accounts, and shipping addresses. Once an address is saved, it can be used for any number of payment instruments, thus saving time.

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

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 shows detailed information for payments made using the email address associated with the account.

In addition to these tools, Xpress-pay provides direct support to all our clients, their customers, and participants of our nationwide reseller network.

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