



InvoiceCloud®

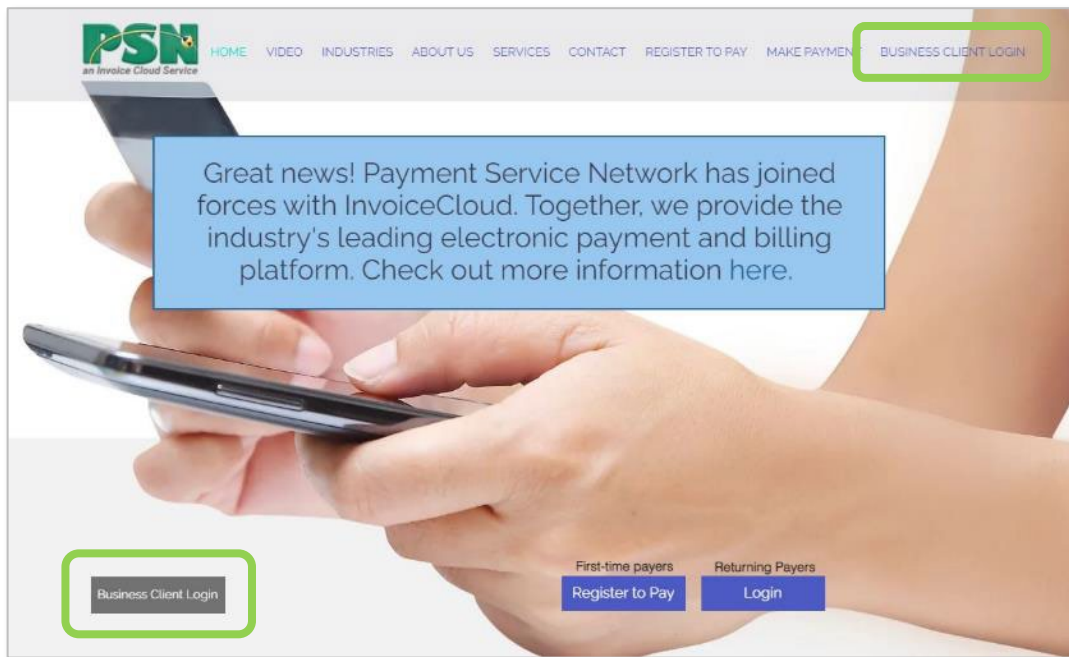
PSN  
an InvoiceCloud Service

# How to Use Your PSN Account Management Center (AMC)

# AMC Login

You must have an administrator in your company set you up as a user before you can log into the AMC. Your administrator decides what functions you can do in the AMC.

Once you are set up, go to [www.PaymentServiceNetwork.com](http://www.PaymentServiceNetwork.com) and click on Business Client Login



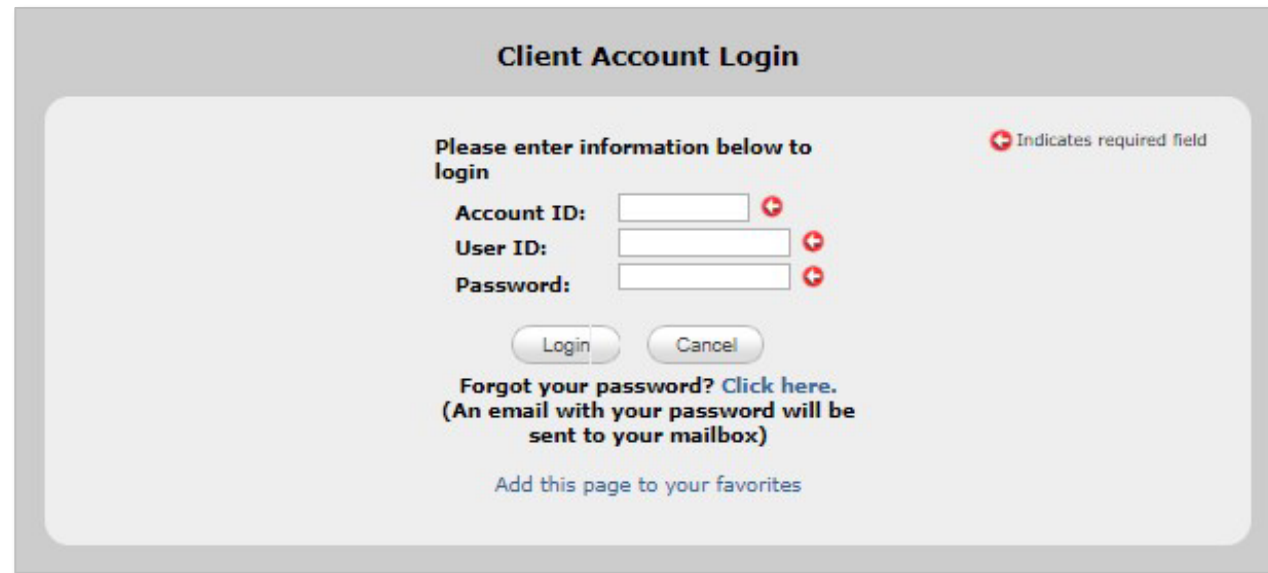
There are 3 types of users. Ask the administrator which one you are:

- **READER:** Can only view their own info, change their password, and view online reports
- **PROCESSOR:** View info, change passwords, request reports, and make payments
- **ADMINISTRATOR:** Can do everything readers and processors can do plus provide refunds, set up new users, and receive PSN service notifications

# AMC Login

To login, enter your Account ID, User ID, and your password (provided by your administrator). If you forget your password, use the "Click here" feature.

To make future log ins quicker, we recommend bookmarking this page in your browser:  
<https://www.paymentservicenetwork.com/ClientLogin.aspx>



The screenshot shows a web form titled "Client Account Login". At the top, it says "Please enter information below to login" and includes a legend: a red plus sign in a circle indicates a required field. There are three input fields: "Account ID:", "User ID:", and "Password:", each with a red plus sign in a circle to its right. Below the fields are two buttons: "Login" and "Cancel". Underneath the buttons, it says "Forgot your password? Click here. (An email with your password will be sent to your mailbox)". At the bottom, there is a link that says "Add this page to your favorites".

# AMC Quick Links

# Getting Around via Quick Links

Click "Return to Quick Links" to navigate back from any page

Check here to verify the Account ID you're viewing

Use Quick Links to navigate to the most frequently used functions

**PSN**  
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Account Management | Payment Tracker | Reports | Payment Tools | Outbound Auto-Call | Support | Managers

**Accounts Startup**

Return to Quick Links

Account ID	Business Name	Manager ID	Manager Role
RT111	PSN Demo (Utility)	tmolstad	Administrator

**Quick Links**

- Make Immediate Payment
- Stop/Cancel a Payment
- Make a Refund
- Block a Payer
- View Real-Time Customer Payments
- View eBills
- View Bank Deposits
- View Refund Status
- View Declined/Rejected Payments
- View Monthly Invoice
- Training & Support Center
- Daily Reconciliation Report
- Month-End Reconciliation Report
- Change Your Email Notifications
- Online Ticketing
- Review/Change 1099-K Info
- View 1099-K Statements

**Service Account Manager (SAM) Information**

**Name:** General SAM  
**Email Address:** sam@paymentservicenetork.com  
**Phone:** 608-442-5100  
**Fax:** 608-442-5050

**PSN Solutions**  
Find out what services you have activated and what other solutions you can benefit from. To talk to your Service Account Manager about the solution, simple click the [ADD] button

Feature
Auto-Post Checking Solution (Check 21)
Outbound Auto-Call Solution
Data Sharing Solution
Cash eDistribution Solution
Virtual Point of Sale Terminal Solution
Online Billing (eBill) Solution
Website Customization Solution
Bank Bill Pay eSolution
Credit Card Payment Solution
eChecks (ACH) Solution
Integrated Credit Card Swipe

**Tips**  
Use these tips to make your job easier and to fully use PSN capabilities

**Newsletters**  
View our most recent newsletters to find more tips and how other companies use PSN

**Tickets**  
Ask questions and view responses, submit website operational issues

**Data Charts**  
See up-to-the-minute transactional charts

Home | About Us | Solutions | Contact Us

# Getting Around via Quick Links

Payment Management

Viewing Reports

Administration

Your PSN Contact

## Quick Links

Make Immediate Payment  
Stop/Cancel a Payment  
Make a Refund  
Block a Payer

View Real-Time Customer Payments  
View eBills  
View Bank Deposits  
View Refund Status  
View Declined/Rejected Payments  
View Monthly Invoice

Training & Support Center  
Daily Reconciliation Report  
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The screenshot shows the PSN Accounts Startup page. At the top, there is a navigation bar with icons for Account Management, Payment Tracker, Reports, Payments Tools, Outbound Auto-Call, Support, and Managers. Below this is the 'Accounts Startup' section with a table for Account ID, Business Name, Manager ID, and Manager Role. The 'Quick Links' section is highlighted with a red circle and contains the following links: Make Immediate Payment, Stop/Cancel a Payment, Make a Refund, Block a Payer, View Real-Time Customer Payments, View eBills, View Bank Deposits, View Refund Status, View Declined/Rejected Payments, View Monthly Invoice, Training & Support Center, Daily Reconciliation Report, Month-End Reconciliation Report, Change Your Email Notifications, Online Ticketing, Review/Change 1099-K Info, and View 1099-K Statements. Below the Quick Links is the 'Service Account Manager (SAM) Information' section with contact details. On the right side, there is a 'PSN Solutions' section with a list of solutions and their descriptions.



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# Real-Time Payments Reports



# Viewing Real-Time Payments

Click "View Real-Time Customer Payments" from Quick Links

**Quick Links**

- Make Immediate Payment
- Stop/Cancel a Payment
- Make a Refund
- Block a Payer
- View Real-Time Customer Payments**
- View eBills
- View Bank Deposits
- View Refund Status
- View Declined/Rejected Payments
- View Monthly Invoice

**Training & Support Center**

- Daily Reconciliation Report
- Month-End Reconciliation Report
- Change Your Email Notifications
- Online Ticketing
- Review/Change 1099-K Info
- View 1099-K Statements

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# Viewing Real-Time Payments

Select your date range

Use the "Search by" dropdown to narrow your results

### Real-Time Payment Transactions

Filter Options: List Approved/Pending Payments

From: 5/1/2023 To: 5/31/2023

Search by: [dropdown menu]

is like [input] is like [input]

List Reset

ing payments not downloaded or posted to your software.

	Customer ID	Description	Payment Method	Payment Type	Payment Status	Transaction Date	Payment Amount	
3	Non-Grouped Single Account	111000003	Utility Payment	Check	Recurring	Approved	05/01/2023 00:01:02	\$15.00
4	Single Account RT111	11100000-s-01	Utility Payment	Check	Online	Approved	05/10/2023 20:04:24	\$10.00

Page Total: 4 Transactions \$40.00  
Grand Total: 4 Transactions \$40.00

# Viewing Real-Time Payments

**Real-Time Payment Transactions**

Return to Quick Links

*Reminder: you can verify the Account ID you're viewing here*

Account ID	Business Name	Manager ID	Manager Role
RT111	PSN Demo (Utility)	tmolstad	Administrator

**Real-Time Payment Transactions**

**Filter Options:** List Approved/Pending Payments

From: 5/1/2023 To: 5/31/2023

Search by: [ ] is like [ ]

[ ] is like [ ]

List Reset

Only view approved/pending payments not downloaded or posted to your software.

Switch to Classic PSN Lock

Use these buttons to download or print a report

Sort your results by clicking on the field names

	Name	Customer ID	Description	Payment Method	Payment Type	Payment Status	Transaction Date	Payment Amount	Total Amount	Deposit Amount	Deposit/ Chargeback Date	Paid By	Downloaded	Options
1	10/17/2022	BALANCE	Bill File Test	Check	BORecurring	Approved	05/01/2023 00:01:02	\$5.00	\$7.95	\$5.00	05/22/2023	arutledge	Yes	Options
2	10/17/2022	BALANCE	Bill File Test	Credit	BORecurring	Approved	05/01/2023 00:01:02	\$10.00	\$10.78	\$10.00	05/22/2023	arutledge	No	Options
3	Non-Grouped Single Account	111000003	Utility Payment	Check	Recurring	Approved	05/01/2023 00:01:02	\$15.00	\$17.95	\$15.00	05/22/2023	arutledge	Yes	Options
4	Single Account RT111	11100000-s-01	Utility Payment	Check	Online	Approved	05/10/2023 20:04:24	\$10.00	\$12.95	\$10.00	05/22/2023	Customer	Yes	Options
<b>Page Total:</b> 4 Transactions								\$40.00	\$49.63	\$40.00				
<b>Grand Total:</b> 4 Transactions								\$40.00	\$49.63	\$40.00				

# Viewing Real-Time Payments

**Real-Time Payment Transactions**

Return to Quick Links

*Reminder: you can verify the Account ID you're viewing here*

Account ID	Business Name	Manager ID	Manager Role
RT111	PSN Demo (Utility)	tmolstad	Administrator

**Real-Time Payment Transactions**

Filter Options: List Approved/Pending Payments

Search by: [ ] is like [ ]  
[ ] is like [ ] [List] [Reset]

Only view approved/pending payments not downloaded or posted to your software.

Switch to Classic PSN Look

Name	Customer ID	Description	Payment Method	Payment Type	Payment Status	Transaction Date	Payment Amount	Total Amount	Deposit Amount	Deposit/ Chargeback Date	Paid By	Downloaded	Options	
1	10/17/2022	BALANCE	Bill File Test	Check	BORecurring	Approved	05/01/2023 00:01:02	\$5.00	\$7.95	\$5.00	05/22/2023	antridge	Yes	Options
2	10/17/2022	BALANCE	Bill File Test	Credit	BORecurring	Approved	05/01/2023 00:01:02	\$10.00	\$10.78	\$10.00	05/22/2023	antridge	No	Options
3	Non-Grouped Single Account	111000003	Utility Payment	Check	Recurring	Approved	05/01/2023 00:01:02	\$15.00	\$17.95	\$15.00	05/22/2023	antridge	Yes	Options
4	Single Account RT111	11100000-4-01	Utility Payment	Check	Online	Approved	05/10/2023 20:04:24	\$10.00	\$12.95	\$10.00	05/22/2023	Customer	Yes	Options
<b>Page Total:</b> 4 Transactions							\$40.00	\$49.63	\$40.00					
<b>Grand Total:</b> 4 Transactions							\$40.00	\$49.63	\$40.00					

Use Filter Options to view additional reports with the same search criteria

# Blocking a Payer



# Blocking a Payer

Click "Block a Payer" from Quick Links

## Quick Links

- Make Immediate Payment
- Stop/Cancel a Payment
- Make a Refund

**Block a Payer**

- View Real-Time Customer Payments
- View eBills
- View Bank Deposits
- View Refund Status
- View Declined/Rejected Payments
- View Monthly Invoice

## Training & Support Center

- Daily Reconciliation Report
- Month-End Reconciliation Report
- Change Your Email Notifications
- Online Ticketing
- Review/Change 1099-K Info
- View 1099-K Statements

## Service Account Manager (SAM) Information

**Name:** General SAM  
**Email Address:** sam@paymentservicenetwork.com  
**Phone:** 608-442-5100  
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The screenshot shows the PSN Accounts Startup page. At the top, there are navigation tabs for Account Management, Payment Tracker, Reports, Payment Tools, Outbound Auto-Call, Support, and Managers. Below this is the 'Accounts Startup' section with a table for Account ID, Business Name, Manager ID, and Manager Role. The 'Quick Links' section is highlighted with a blue circle, and the 'Block a Payer' link is highlighted with a red box. The 'Service Account Manager (SAM) Information' section is also visible, showing contact details for General SAM. On the right side, there are 'PSN Solutions' and 'Tips' sections.

# Blocking a Payer

Results Per Page: 25 Page 1  
Total Payers Blocked: 15

	Blocked Type	Blocked Information	Customer Number	Date Blocked	Block Status	Allowed Pay Types	Update ID
<input type="checkbox"/>	Customer ID	Dennis Cant	0100000008006	04/27/2023	Blocked	None	drobertson
<input type="checkbox"/>	Credit Card	****0005		03/07/2023	Blocked		
<input type="checkbox"/>	Credit Card	****1111		03/07/2023	Blocked		zthiede
<input type="checkbox"/>	Customer ID	Name	021658	03/07/2023	Blocked	None	kmcintyre
<input type="checkbox"/>	Customer ID	Jon Bray		02/15/2023	Blocked	None	bhardy
<input type="checkbox"/>	Customer ID	STASIA HALL	40003730021	08/02/2022	Blocked	None	jbray
<input type="checkbox"/>	Customer ID	4050 L&W HOLDINGS LLC	09-160-016-101-009-00	06/17/2020	Blocked	None	jbray
<input type="checkbox"/>	Credit Card	****5198		03/03/2020	Blocked		
<input type="checkbox"/>	Customer ID			03/03/2020	UnBlocked	All	mschatz
<input type="checkbox"/>	Customer ID	AIKENS, JERRY	09-160-004-126-008-00	03/03/2020	UnBlocked	All	dpratt
<input type="checkbox"/>	Customer ID	KYLEE ALLEN	2017-023	01/31/2020	UnBlocked	All	dpratt
<input type="checkbox"/>	Customer ID	Jane Doe	100002002	01/31/2020	UnBlocked	All	dpratt
<input type="checkbox"/>	Customer ID	PSN Support	1234	01/31/2020	UnBlocked	All	tmolstad
<input type="checkbox"/>	Customer ID	Demo Company	43356009-1025301	12/18/2019	Blocked	None	1820191209595532707
<input type="checkbox"/>	Credit Card	****1118		12/16/2019	Blocked		

To block a new payer, click "Add Block for a Payer"

Add Block for a Payer

View/Edit

Delete

Block/Unblock Selected:

Select Status

# Blocking a Payer

Results Per Page: 25 Page 1  
Total Payers Blocked: 15

	Blocked Type	Blocked Information	Customer Number	Date Blocked	Block Status	Allowed Pay Types	Update ID
<input type="checkbox"/>	Customer ID	Dennis Cant	0100000008006	04/27/2023	Blocked	None	drobertson
<input type="checkbox"/>	Credit Card	****0005		03/07/2023	Blocked		
<input type="checkbox"/>				03/07/2023	Blocked		zthiede
<input type="checkbox"/>					Blocked	None	kmccintyre
<input type="checkbox"/>					Blocked	None	bhardy
<input type="checkbox"/>					Blocked	None	jbray
<input type="checkbox"/>					Blocked	None	jbray
<input type="checkbox"/>	Credit Card	****5198			Blocked		
<input type="checkbox"/>	Customer ID			03/03/2020	UnBlocked	All	mschatz
<input type="checkbox"/>	Customer ID	AIKENS, JERRY	09-160-004-126-008-00	03/03/2020	UnBlocked	All	dpratt
<input type="checkbox"/>	Customer ID	KYLEE ALLEN	2017-023	01/31/2020	UnBlocked	All	dpratt
<input type="checkbox"/>	Customer ID	Jana Dose	100002002	01/31/2020	UnBlocked	All	dpratt
<input checked="" type="checkbox"/>	Customer ID	PSN Support	1234	01/31/2020	UnBlocked	All	tmolstad
<input type="checkbox"/>	Customer ID	Demo Company	43356009-1025301	12/18/2019	Blocked	None	1820191209595532707
<input type="checkbox"/>	Credit Card	****1118		12/16/2019	Blocked		

From the pop-up, select the criteria to use to locate the payer you'd like to block (Name/Customer ID, checking or savings account number, or credit card number)

Select Block Payment Method:

- Select a Block Type -
- Select a Block Type -
- Name/Customer ID
- eChecking Account Number
- eSavings Account Number
- Credit Card Number

# Blocking a Payer

Enter your search criteria

Check the box next to the customer you'd like to block

Select the payment method you'll allow and click "Block access for selected customer" to complete your block

Please search by customer number or first/last name to block a customer by name:

Customer Number:

- OR -

First Name:

Last Name:

Total Customers Found: 1

	Name	Customer ID	First Name	Last Name	Addr1	Apt number	city	state	email
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	[blurred]

**Set Block Payment Method:**

- All Methods
- All Methods
- eCheck Only
- eSavings Only
- Credit Only
- Cash Only

Note: "Set Block Payment Method" will let you specify the payment method you'll *allow*. For example, if you select "credit only," the blocked customer will only be able to make a payment by credit card. You can also select "All Methods" to block all payment methods for the selected customer.



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# Making a Payment



# Making a Payment

Click "Make Immediate Payment"  
from Quick Links

## Quick Links

**Make Immediate Payment**

Stop/Cancel a Payment

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# Making a Payment


To make a payment on behalf of a customer, enter their name or account number and click "Search"

### Locate Customer


In order to continue your payment process, please enter the payer's First and Last Name, Company Name, or Customer Account Number

[Switch to Classic View](#)


First Name:  

Last Name:  

--- OR ---

Business Name:  

--- OR ---

Account Number:  

[Search](#) [Cancel](#)

# Making a Payment

**Payment Page**

**Payment Information**

Company Name: PSN Demo (Utility)  
Customer Name: PSN Support  
Customer ID: 1234  
Receipt Email Address:

Select the Payment Type from the options below:

Back Office  
 Phone  
 Fax

Available Methods: Please add a payment method below.

**New Payment Methods**

Account Type: VISA  
Name on Card: PSN Support  
Credit Card Number: 1234-5678-9101-1  
Expiration Date: 12/2025 (mm/yyyy)  
ZIP Code: 12345

**Payment Details**

Description: Utility Payment  
Balance (as of 6/29/2023): \$0.00  
For a more current balance, call Sun Prairie Utilities at 608-837-5500. Payments can take up to 48 hours to post.  
Payment: \$   
Total Charge: \$100.00  
Payment Date: 8/30/2024

Verify the customer's name and email address

If the customer has a saved payment method, it will appear here

If the customer does not have a saved payment method, you can enter a new method here

Enter the payment amount (convenience fees will automatically calculate, if applicable) and date to be paid

Click "Continue" to confirm your payment

# Making a Payment

Final Step: **Review and then hit submit** to finalize your payment

**Payee Information**

Company ID: RT111  
Business Name: PSN Demo (Utility)\*

**Payer Information**

Payment From: PSN Support  
Email Address: PSN Support  
Payment Description: Utility Payment

**Payment Information** Change

Customer ID: 1234  
Account Name: PSN Support  
Address: 123 Main Street  
Description: Utility Payment

Payment Date: 7/31/2023  
Payment: \$10.00  
Convenience Fee: **\$0.78**  
Total Charge: **\$10.78**  
Payment Type: VISA  
Billing Name: PSN Support  
Account Number: \*\*\*\*\*3768  
Expiration Date: 03/2024

Please provide the Verification Number (CVV) on the back of your credit card listed above:

\*Note: "Payment Service Network Inc 866-9177368 WI" will appear on your credit card statement.

**Please press the "Submit" button only ONCE.**

Some transactions may take up to a minute to complete. If you think your payment didn't go through, contact a PSN Representative to verify payment details. Toll free # 877-390-7368.

Review all information, enter credit card verification number (if applicable), and hit "Submit Payment" to complete the payment



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# Back Office AutoPay



# Back Office AutoPayments

The screenshot shows the PSN back office interface. At the top, there is a navigation bar with icons for Account Management, Payment Tracker, Reports, Payment Tools, Outbound Auto-Call, Support, and Managers. A 'Log Off' button is in the top right corner. Below the navigation bar, there are several sections: 'Accounts Startup' with a 'Return to Quick Links' button, a 'Quick Links' list, 'Service Account Manager (SAM) Information' (Name: General SAM), and a 'Solutions' section. The 'Payment Tools' dropdown menu is open, showing options like 'Make Immediate Payment', 'Schedule a Future Payment', 'Virtual POS Terminal', 'Image Deposit Direct (Check21)', 'Setup/Change Auto-Pays' (highlighted with a green box), and 'Setup Block Payments'. A callout box with a teal arrow points to the 'Setup/Change Auto-Pays' option with the text 'Click "Setup/Change Auto-Pays" under Payment Tools'. The 'Solutions' section contains a table of features with their activation status and 'Learn More' links.

Business Name	Manager ID	Manager Role
PSN Demo (Utility)	tmolstad	Administrator

Feature	Status	Action
Auto-Post Checking Solution (Check 21)	✓	<a href="#">Learn More</a>
Outbound Auto-Call Solution	✓	<a href="#">Learn More</a>
Data Sharing Solution	✓	<a href="#">Learn More</a>
Cash eDistribution Solution	ADD	<a href="#">Learn More</a>
Virtual Point of Sale Terminal Solution	✓	<a href="#">Learn More</a>
Online Billing (eBill) Solution	✓	<a href="#">Learn More</a>
Website Customization Solution	ADD	<a href="#">Learn More</a>
Bank Bill Pay eSolution	ADD	<a href="#">Learn More</a>
Credit Card Payment Solution	✓	<a href="#">Learn More</a>
eChecks (ACH) Solution	✓	<a href="#">Learn More</a>
Integrated Credit Card Swipe	ADD	<a href="#">Learn More</a>

# Back Office AutoPay


## Auto-Pay List

**Filter Options:** List all active back-office Auto-Pay

Search by...  is like

is like

is like



➔

Click on "Add New Auto-Pay" to create a new Back Office AutoPayment


Name	Customer ID	Address	Auto-Pay Status	Customer Status	Payment Method	Schedule	Next Payment	Auto-Pay End Date	Payment Amount	Current Balan	Update ID	Change Date	
10/17/2022	BALANCE	02:51:35 PM	Active	Inactive	Credit	01Month	10/1/2023	(None)	\$10.00	(\$7,158,772,177.00)	bhardy	2/15/2023	Options
10/17/2022	BALANCE	02:51:35 PM	Active	Inactive	Check	01Month	10/1/2023	(None)	\$5.00	(\$7,158,772,177.00)	bhardy	2/15/2023	Options
Josh Abrahamsen	123132132	1011 Tester Street	Active	Inactive	Credit	01Month	10/1/2023	(None)	\$5.00		dpratt	6/10/2019	Options
ANDERSON DARREL D	1906242002	12623 OLD HWY 169	Active	Inactive	Credit	25Month	9/25/2023	(None)	\$500.00	\$0.00	lhoang	8/25/2017	Options
ANDERSON DARREL D	1906242002	12623 OLD HWY 169	Active	Inactive	Credit	24Month	9/24/2023	(None)	\$800.00	\$0.00	lhoang	8/24/2017	Options
ARENS PENNY	1910501100	1610 E 29TH ST	Active	Inactive	Check	01Month	10/1/2023	(None)	\$10.00	\$15.42	dpratt	10/2/2019	Options
CONDOS, adaY A	005006-000	162 W Madison ST	Active	Inactive	Check	25Month	9/25/2023	(None)	\$200.00	\$0.00	jabrahamsen	7/25/2017	Options
ANN FUDGE	100409	350 BENNETT LN	Active	Inactive	Check	03Month	10/3/2023	(None)	\$13.00	\$1,352.34	dpratt	10/2/2019	Options
OPEN ACCOUNT	100	noaddr	Active	Inactive	Check	01Month	10/1/2023	(None)	Full Balance	\$0.00	cwilliamson	4/16/2014	Options
ROBYN SCHORLE	00000022	19363 FITZGERALD RD	Active	Active	Credit	09Month	9/9/2023	(None)	Full Balance	\$97.98	rmodorft	7/5/2023	Options
Test Tao		123 Madison AVE	Active	Inactive	Check	15Month	9/15/2023	(None)	\$100.00		sthao	10/15/2015	Options
Chetu Test	123456789	2901 International Ln	Active	Inactive	Check	01Month	10/1/2023	(None)	\$5.00	\$0.00	lziebert	4/6/2017	Options
Chetu Test	123456789	2901 International Ln	Active	Inactive	Check	02Month	10/2/2023	(None)	Full Balance	\$0.00	lziebert	6/2/2017	Options
Chetu Test	123456789	2901 International Ln	Active	Inactive	Check	05Month	10/5/2023	(None)	\$10.00	\$0.00	lziebert	6/2/2017	Options
Chetu Test	123456789	2901 International Ln	Active	Inactive	Check	25Month	9/25/2023	(None)	\$200.00	\$0.00	jabrahamsen	7/25/2017	Options
Bryan Wenc	654321786	123 happy street	Active	Inactive	Credit	24Month	9/24/2023	(None)	\$1,000.00		lhoang	8/24/2017	Options
Bryan Wenc	654321786	123 happy street	Active	Inactive	Credit	25Month	9/25/2023	(None)	\$500.00		lhoang	8/25/2017	Options
Bryan Wenc	654321786	123 happy street	Active	Inactive	Check	24Month	9/24/2023	(None)	\$125.00		bwenc	7/24/2015	Options




# Back Office AutoPay


**Locate Customer**

**In order to continue your payment process, please enter the payer's First and Last Name, Company Name, or Customer Account Number**


**First Name:**  

**Last Name:**  

--- OR ---

**Business Name:**  

--- OR ---

**Account Number:**   

Enter the customer's first and last name (if you don't know their account number)

Note: You do not need to fill out the full names to see search results. Once you've located the correct customer from the search results, click "Select" to continue.

# Back Office AutoPay

### Payment Page


#### Payment Information

Company Name: PSN Demo (Utility)  
Customer Name: ROBYN  
Customer ID: 00000022  
Email:

#### Payment Methods

Available Methods: Please add a payment method below.



#### New Payment Methods

  
Account Type:   
Billing Name:

#### Billing Information

Payment Date:

**Note:** Do not set up Auto-Pay to run less than 3 days prior to the actual bill due date; the most current balance may not be available.

Start Date:    
End Date:  

Your next payment will occur on:

**Note:** Automatic Payments will run until manually cancelled unless End Date is specified.

**IMPORTANT:** If the balance you owe exceeds the maximum payment limit of \$2000.00, we will have to process more than one payment on your behalf. Convenience fees will be added to each payment.


Enter the customer's payment type and payment information

And choose a start date for the AutoPay

Note: Do not enter an end date until you know when that customer will be leaving that property


# Back Office AutoPay

## Payment Details

**Description:** Utility Payment  

**Balance (as of 6/27/2023):** \$97.98

For a more current balance, call PSN Demo (Utility) at 6089999999. Payments can take up to 48 hours to post.

**Payment:**  Enter specific payment amount  
\$  

Pay balance in full

**Convenience Fee:** \$0.50

**Total Charge:** Full Balance + Convenience Fee

Choose to either pay the balance in full or enter a specific payment amount

Once you've completed all required information, click "Continue"

Continue



Cancel

Note: By choosing "Pay Balance in Full," the system will draw on the file sent from your software nightly or every other night. It depends on the uploading of the "Customer File" that you send. For best results, we recommend sending a file daily to the PSN system from your software.

You can also choose a specific amount to draw each month (this would be up to the utility to decide). This amount would be drawn monthly – not what the software states.


# Back Office AutoPay

**Payment Details**

Description: Utility Payment  

Balance (as of 6/27/2023): \$97.98 [View Details](#)

For a more current balance, call PSN Demo (Utility) at 6089999999. Payments can take up to 48 hours to post.

Payment:  Enter specific payment amount  
\$  

Pay balance in full

Convenience Fee: \$0.50

Total Charge: Full Balance + Convenience Fee

[Continue](#) [Cancel](#)

Choose to either pay the balance in full or enter a specific payment amount

Once you've completed all required information, click "Continue"

Note: By choosing "Pay Balance in Full," the system will draw on the file sent from your software nightly or every other night. It depends on the uploading of the "Customer File" that you send. For best results, we recommend sending a file daily to the PSN system from your software.

You can also choose a specific amount to draw each month (this would be up to the utility to decide). This amount would be drawn monthly – not what the software states.

# Back Office AutoPay

Final Step: **Review and then hit submit** to finalize your payment

## Payee Information

Company ID: RT111  
Business Name: PSN Demo (Utility)\*

## Payer Information

Payment From: ROBYN  
Email Address: Rsch@psnpay.com  
Payment Description: Utility Payment

## Payment Information

Change

Customer ID: 00000022  
Account Name: ROBYN  
Address:  
Description: Utility Payment  
Apartment Number:

Scheduled Date: 9th of the month  
Start Date: 10/9/2023  
End Date: [None]  
Next Payment Will Occur On: 10/9/2023

Payment: Full Balance  
Convenience Fee: 3.00%  
Total Charge: Full Balance + 3.00%  
Payment Type: VISA  
Billing Name: ROBYN  
Account Number: \*\*\*\*\*1111  
Expiration Date: 05/2026

Please provide the Verification Number (CVV) on the back of your credit card listed above:

\*Note: "Payment Service Network Inc 866-9177368 WI" will appear on your credit card statement.

Submit Payment

Cancel

Review all information for accuracy

Once reviewed, enter the CVV number (if applicable) and click "Submit Payment"

# Back Office AutoPay

You'll see the below "success" message when you've successfully set up a Back Office AutoPay.

**Automatic Payments setup successfully. Auto-pay must be deactivated within 48 hours of next schedule auto-payment to insure that item will be canceled.**

### Auto-Pay List

Filter Options: List all active back-office Auto-Pay

Search by... is like

is like

is like

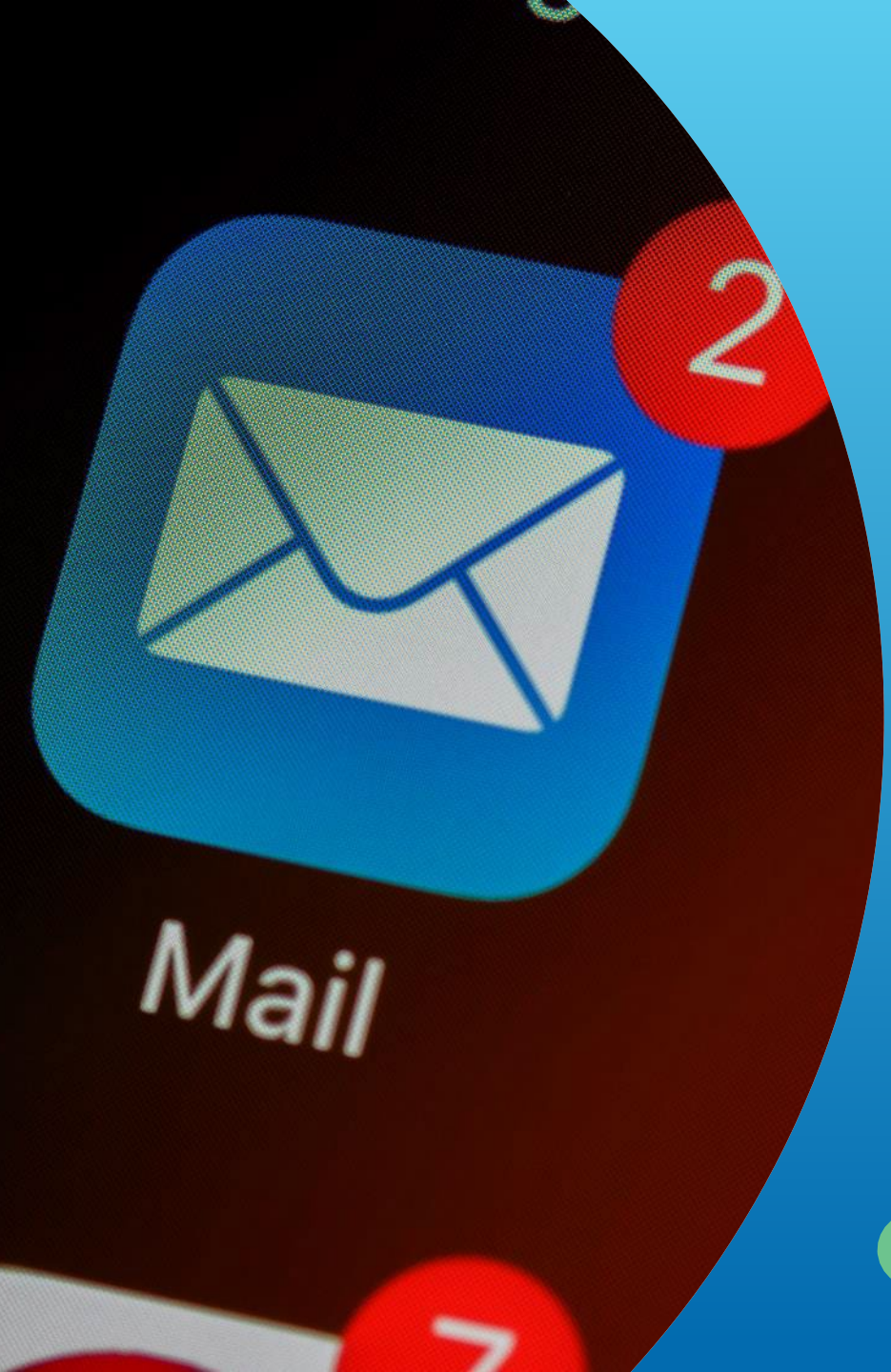
List Reset Add New Auto-Pay

Name	Customer ID	Address	Auto-Pay Status	Customer Status	Payment Method	Schedule	Next Payment	Auto-Pay End Date	Payment Amount	Current Balance	Update ID	Change Date

You'll be able to view all active AutoPayments on the Setup/Change Auto-Pay" page (this page defaults to viewing Back Office AutoPayments).

Note: If the AutoPayment was created in the Back Office feature, the customer will need to contact the office to make any changes. Customers do not have access to make these changes from their PSN profile page.

# Managing Email Notifications



# Updating Email Notifications



**Quick Links**

- Make Immediate Payment
- Stop/Cancel a Payment
- Make a Refund
- Block a Payer
- View Real-Time Customer Payments
- View eBills
- View Bank Deposits
- View Refund Status
- View Declined/Rejected Payments
- View Monthly Invoice

**Training & Support Center**

- Daily Reconciliation Report
- Month-End Reconciliation Report
- Change Your Email Notifications**
- Online Ticketing
- Review/Change 1099-K Info
- View 1099-K Statements

**Service Account Manager (SAM) Information**

**Name:** General SAM  
**Email Address:** sam@paymentservicenetwork.com  
**Phone:** 608-442-5100  
**Fax:** 608-442-5050

**PSN** Account Management Payment Tracker Reports Payments Tools Outbound Auto-Call Support Managers

**Accounts Startup**

Return to Quick Links

Account ID	Business Name	Manager ID	Manager Role
RT11	PSN Drive (2018)	Imstad	Administrator

**Quick Links**

- Make Immediate Payment
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**Service Account Manager (SAM) Information**

**Name:** General SAM  
**Email Address:** sam@paymentservicenetwork.com  
**Phone:** 608-442-5100  
**Fax:** 608-442-5050

**PSN Solutions**

Find out what services you have activated and what other solutions you can benefit from. To Talk to your Service Account Manager about the solution, simply click the [ADD] button.

**Features**

- Auto-Post Checking Solution (Check 21)
- Outbound Auto-Call Solution
- Data Sharing Solution
- Cash eDistribution Solution
- Virtual Point of Sale Terminal Solution
- Online Billing (eBill) Solution
- Website Customization Solution
- Bank Bill Pay eSolution
- Credit Card Payment Solution
- eChecks (ACH) Solution
- Integrated Credit Card Swipes

**Tips**

Use these tips to make your job easier and to fully use PSN capabilities.

**Newsletters**

View our most recent newsletters to find more tips and how other companies use PSN.

**Tickets**

Ask questions and view responses, submit website operational issues.

**Data Charts**

See up-to-the-minute transactional charts.

Home About Us Solutions Contact Us



# Updating Email Notifications: Adding New User

To add a new user, click "Add New User"

**User Settings**

Page: 1 of 5 Items Displayed: 10 Item 1 to 10 of 50

<input type="checkbox"/>	User OID	Name	Title	User ID	Role	Status	
<input type="checkbox"/>	0420230423032054925	1st User	1st User	1stuser	Reader	Active	<input type="button" value="Options"/>
<input type="checkbox"/>	2320080408525337013	andrew Flaherty		afaherty	Administrator	Active	<input type="button" value="Options"/>
<input type="checkbox"/>	1320130210210418867	AnnMarie Rutledge	Test	amtest1	Administrator	Active	<input type="button" value="Options"/>
<input type="checkbox"/>	2120181214299025430	Norman Ehiorobo	significant_responsibility(CTO	AuthorizedSigner	Reader	Active	<input type="button" value="Options"/>
<input type="checkbox"/>	0620190841796794116	Test Test	Test	bhardy	Processor	Active	<input type="button" value="Options"/>
<input type="checkbox"/>	2220170910314023773	Brad Schleppli	Remit Plus Support	bschleppli	Processor	Active	<input type="button" value="Options"/>
<input type="checkbox"/>	2720161012145237303	Check 21		check	Administrator	Active	<input type="button" value="Options"/>
<input type="checkbox"/>	2020160413191431850	colton young	Tester	cyoung	Administrator	Active	<input type="button" value="Options"/>
<input type="checkbox"/>	0820070515452229843	David Batterman	National Sales Director	dbatterman	Administrator	Active	<input type="button" value="Options"/>
<input type="checkbox"/>	1720090313275708217	Debbie Fox-Schroeder		Debbie	Administrator	Active	<input type="button" value="Options"/>

Page: 1 of 5 Items Displayed: 10 Item 1 to 10 of 50

*Note: only admins will be able to add new users*

# Updating Email Notifications: Adding New User

**Add New User**

First Name:

Last Name:

Title:

Role: -- Select Role --

Email:

Phone:

Fax:

---

**Login Information**

User Name:

Password:

Verify Password:

Save Close

Fill out user information, select their role, enter your login information, and click "Save"

## Role options:

- **Reader:** Can only view information
- **Processor:** Can view information and take payments
- **Admin:** Can view info, take payments, provide refunds, and add new users



# Updating Email Notifications: Emailed Reports

**User Settings**

Select report options for **Test Test (bhardy)** and click "Save Changes"

Report ID	Report Name	Frequency
1000	Details of Payments	Never
1001	Summary of Bank Deposits	Never
1003	Summary of Payments	Never
1004	Details of Bank Deposits	Never
1005	Invoice Report	Never
1006	Details of Declined/Rejected Payments	Never
1007	Details of Refunded Payments	Never
1008	Details of Disputed Payments	Never
1009	Customer Service Requests	Never
1010	Transactions not Downloaded	Never
1011	System Changes on PSN	Never
1012	Bill Load Report	Never
1013	Failed BOffice Auto-Pay Report	Never

Choose the frequency from the dropdown next to the report you'd like the user you selected to receive

Click "Save Changes"

Save Changes Close



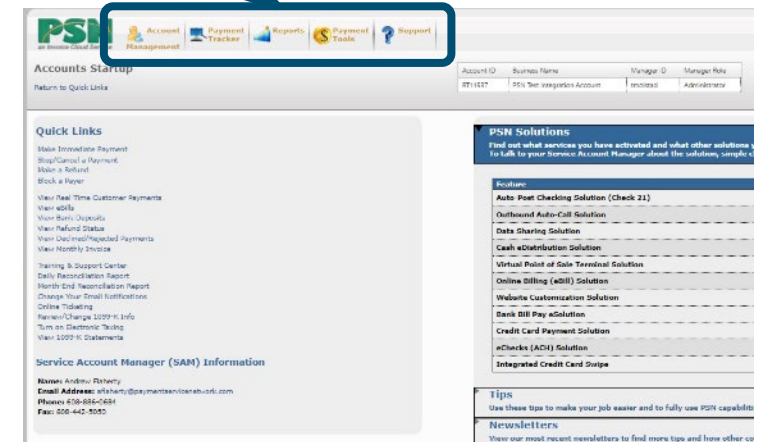
# More Information

# More Functions in the Tabs Menu

Each tab in this navigation bar has an additional dropdown menu



- **Account Management:** Update Account Information, Upload/Download Files, Logo Review, and more
- **Payment Tracker:** View Real-time Payments, View Deposits, View Payment Histories, and more
- **Reports:** View registered customers, Manage eBills, and more
- **Payment Tools:** Make Payments on Behalf of Customers, Setup/Change AutoPay, and more
- **Support:** Ticket Center, FAQs, and more



# Getting Assistance

Click "Online Ticketing" to submit a ticket for support

**Quick Links**

- Make Immediate Payment
- Stop/Cancel a Payment
- Make a Refund
- Block a Payer
- View Real-Time Customer Payments
- View eBills
- View Bank Deposits
- View Refund Status
- View Declined/Rejected Payments
- View Monthly Invoice

**Training & Support Center**

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- Month-End Reconciliation Report
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- Online Ticketing**
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- View 1099-K Statements

**Service Account Manager (SAM) Information**

**Name:** General SAM  
**Email Address:** sam@paymentservicenetwork.com  
**Phone:** 608-442-5100  
**Fax:** 608-442-5050

The screenshot shows the PSN Accounts Startup page. At the top, there is a navigation bar with icons for Account Management, Payment Tracker, Reports, Payment Tools, Outbound Auto-Call, Support, and Managers. Below this is the 'Accounts Startup' section with a table of account information. The 'Quick Links' section is circled in blue and contains the same list of links as the callout box. The 'Online Ticketing' link is highlighted with a green box. To the right, there is a 'PSN Solutions' section with a list of solutions and their features. At the bottom, there is a 'Service Account Manager (SAM) Information' section with contact details.

# Getting Assistance

Account ID	Business Name	Manager ID	Manager Role
RT11537	PSN Test Integration Account	tmolstad	Administrator

Below is a list of all support tickets for your Account for the selected date range. From this page you can review the details of any support ticket by clicking on the appropriate link or can create a new support ticket.

**Advanced Search**

**From:**

**To:**

**Search By:**

is like

is like

**Tickets Submitted to PSN**

**No tickets to display**

Click "Create New Ticket"



# Getting Assistance

Fill out all required fields and click "Save" to submit your ticket

Note: Please be as specific as possible in the Ticket Details section when describing an issue

### Online Ticketing

Indicates required field.

Please fill out all the following required fields. If you already have a support ticket open for an issue, please update the ticket you already have opened for an issue and do not open a new one. If you have not opened the ticket already, please see FAQ section before reporting an issue so that you can get immediate solution if such issues are already in FAQ section.

**Creator Account ID:**

**Creator Email:**

**Ticket Category:**

**Ticket Subject:**

**Ticket Priority:**

**Ticket Details:**

**Ticket Assignment:**

- Ticket viewable by Account Managers
- PSN-only Ticket
- Create Tech Ticket