United Systems

United Systems & Software, Inc.

G5 Web Portal Customer Guide

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WELCOME

Welcome to the Web Portal! This portal allows customers to view and pay their bills online.

Here, users can also

» View information about how much they used a service in the past for metered services, such as water, gas, and electricity

» See announcements from the utility

» Choose whether or not to receive emailed announcements

» Change their password

» View information about past transactions

» Add other accounts for the purpose of paying multiple bills simultaneously, if needed

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When customers open the link to the utility's web portal, they will see a login screen. Customers can use this screen to:

» Log In

» Register an account

» Retrieve a forgotten password

Logging In

To log into an account, simply enter the registered user name and password, then click **Sign In**.

Sign In

Email

Password

Sign In

Register an Account

Selecting **Register now to get started** on this screen takes a new user to the Account Registration screen, where customers can sign up for Web Portal online payment service.

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First Name – Customers should enter their first name as it appears on their bill.

Last Name – Customers should enter their last name as it appears on their bill.

Phone Number – Customers should enter a phone number which the utility can use to contact them.

Email – Customers should enter an email address to associate with this account. This email address will be used to:

>> Change the password in the event that it is forgotten.

>> Receive online bills.

>> Receive messages from the utility.

Password – Web portal passwords must be at least 6 characters total. Customers should create a password that is secure, but easily remembered. It is recommended that customers choose a password that:

>> Contains a combination of letters, numbers, and characters

>> Contains both upper and lowercase letters

>> Does not use easily obtainable names, sensitive information, etc., including:

>> Pet's names, children's names, or spouse's names

>> Social security numbers or dates of birth for the user or their family members

Confirm Password – Enter the password again to confirm that it has been entered accurately.

After entering the information, click "Create User." An email will be sent from the utility to the email address entered on this screen with a link to confirm the validity of the address. Open the email once it has been received and click the provided link.

Register

Create User   Link Account   Get Started

First Name   Last Name

Phone Number   Email

* Email confirmation is required after registration.

Password

* Password must be at least 6 characters, include upper/lowercase, digit, and non-alphanumeric.

Confirm Password

Email Confirmation

Thank you for creating a user account with us! When you are ready, confirm your email by clicking the button below.

Confirmation is required in order to complete registration.

Confirm

If you're having trouble clicking the "confirm" button above, copy and paste the URL below into your web browser.

After entering initial information, users will be required to enter information to confirm their identity.

1 Enter the customer **Account Number** here.

2 These fields are used to confirm the user's identity and to link the customer's billing account to their web portal account.

> » If using a *metered service* (such as water, gas, etc.) enter the **current meter reading** from the most recent bill.

> » If using **no** metered services (such as garbage), enter the **current balance** from the most recent bill.

Register

✔ User created, an email has been sent to [redacted] for confirmation.

Create User | **Link Account** | Get Started

AccountNumber

_____ **1**

Current Reading **2**

_____

Current Balance

_____

Link Account

When ready, click **Link Account** to confirm the user's identity. Once the billing account has been linked to the web portal account, a final screen will appear.

Register

Create User | Link Account | **Get Started**

Success!

A user account has been created with linked account/accounts. Use this account to manage all of your utility services and make payments 24/7.

If you haven't already please go and locate your verification email sent to "[redacted]" in order to complete the sign up process. Email confirmation links will expire in 24 hours.

ℹ Be sure to **confirm** the account using the verification email.

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Retrieve a Forgotten Password

A customer may forget their password. Clicking **Forget Password** in the sign in screen causes an email to be sent to the email address associated with this account.

Forgot Password

Email

Confirm Email

Submit

Password Reset

You recently requested to reset your password for your account. Click the button below to reset it.

Password Reset

If you did not request a password reset, ignore this email or reply to let us know. This password reset is valid for the next hour.

If you're having trouble clicking the "password reset" button above, copy and paste the URL below into your web browser.

This email will provide a temporary password. This temporary password should be set to a different password upon successfully logging in.
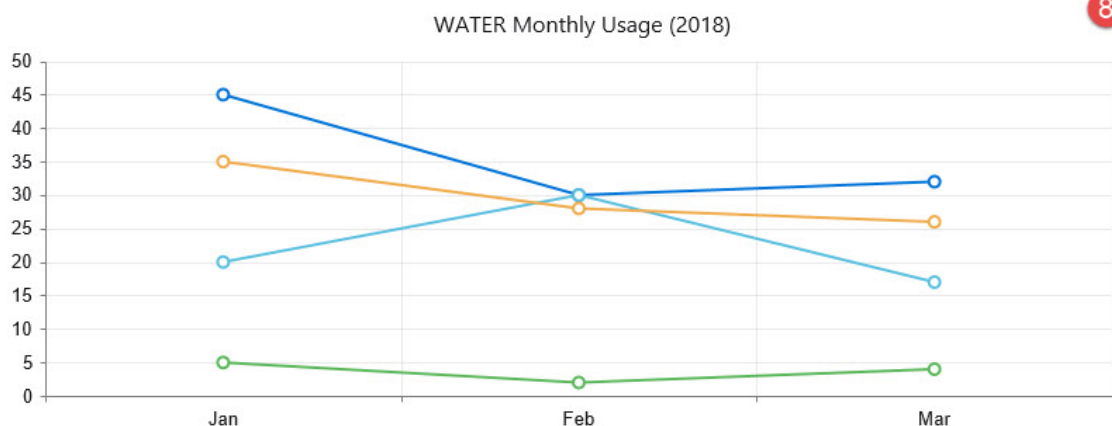
AFTER LOGIN

📊	Usage
👤	Accounts
🕘	History
💳	Pay
📄	Bill

Users will see a set of five options in the menu on the left: *Usage, Accounts, History, Pay,* and *Bill*.
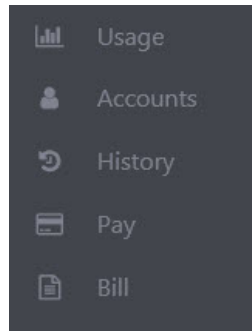
Usage

This screen shows **charts** displaying the monthly amount of consumption for metered services. For example, if a user has a water service, they will be able to see how much water they used each month for the past year. Users can also view years as far back as information is available. Separate charts will appear for each metered service if there is more than one.

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| Usage | ◀ 2018 ▶ | Line ▼ | ⟳ Refresh | ▭ Pay | ⟳ History | ▤ Bill |

Overview

WATER Monthly Usage (2018)

```
50
45
40
35
30
25
20
15
10
 5
 0
       Jan              Feb              Mar
```

① Select a **year** here to view information for different years. The current year is the default.

② Choose the **format** of the graph displayed here: *Area*, *Bar*, *Column*, or *Line*.

③ Click this button to **refresh** the information in the graph.

④ Click this button to go to the **Pay** screen.

⑤ Click this button to go to the **History** screen.

⑥ Click this button to go to the **Bill** screen.

⑦ If there is more than one account connected to this one, there will be separate tabs here for each customer. Click a tab to view a customer-specific graph. The amount of the current bill and last payment amount and date will also be displayed here.

⑧ This is a **graph** displaying information about usage. If there is more than one customer connected to an account, each customer's usage will be represented by a different color.

» Hover the mouse over a point to view the month and the specific consumption value.

Accounts

The **Accounts** screen allows users to change some information about their online accounts. If there is more than one customer account associated with this web portal account, all accounts will appear here.

Most users will only view information for their account. However, if a user pays bills for multiple accounts, they can associate more than one account with their account and both view usage and pay bills for all accounts. For example, a landlord may want to use this feature.

1 Basic information about each account will appear here. The address listed here is the customer's **service** address. Use the button at the right of the table to change whether each user receives a bill notice. See Notice for more information about sending bill notices.

2 Click this button to **refresh** the information displayed here.

3 Click this button to **add** another customer account to this account. Users will need an *account number* to select which account to add, as well as the *current reading and balance*. These are used to verify the user's identity. See Register an account for details. When ready, click the *Submit* button to add this account.

4 Click on an account in the table, then choose **Delete** to remove a customer from this account.

History

Clicking the **History** button displays past charges and payments for the customer's account, starting with most recent transactions. The date of the charge or payment, account number, type of transaction, check number (if applicable), and amount of the transaction will all be displayed.

If there are multiple accounts associated with their account, information for all accounts can be viewed here. To choose a specific account, select the account from the menu at the top right of the screen.

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History				All Accounts ▼
Date	**Account**	**Description**	**Check Number**	**Amount**
11-02-2017		Water Billing - Charge		$79.01
11-02-2017		Water Billing - Charge		$72.64
11-02-2017		Water Billing - Charge		$58.85
10-05-2017		Check Payment - Payment	4185	-$71.10
09-27-2017		Overpayments - Apply Overpayment		$0.00
09-27-2017		Water Billing - Charge		$58.85
09-27-2017		Water Billing - Charge		$71.10
09-27-2017		Water Billing - Charge		$123.41
09-27-2017		Aqualine Protections - Charge		$62.65
09-14-2017		Check Payment - Payment	2679	-$63.71

|◀ ◀ **1** 2 3 4 5 6 7 8 9 10 … ▶ ▶| 1 - 10 of 161 items

Pay

The **Pay** screen shows users the net amount which they currently owe. This amount will show in the amount to pay column automatically, but the value can be changed.

1 If there are multiple accounts associate with this billing account, all accounts and the amount owed will appear here. Check the box beside the account for which to make a payment.

Pay				**2** Credit Check
1 🔒 Upon payment selection you will be transferred to a secure payment processing server to ensure your data remains confidential.				
Account	**Name**	**Address**	**Due**	**Pay**
			$0.00	
			$207.03	$207.03
			$72.64	$72.64
			$117.70	$117.70
Total			$0.00	**$0.00**

2 At the top right of the screen, users can choose to pay by **Credit Card** or by **Check**. Both options take the user to the utility's designated payment processor.

> ❗ Payment web sites are hosted by a third-party processor. Each processor looks different and offers features that vary depending on the vendor.

Bill

The **Bill** screen displays a variety of information about the selected customer's current bill. The customer's account number, name, and address as well as the utility's address will appear on this screen. The bill shows a list of all charges broken down by service/service charge, the amount of each charge and any usage, the net due, and when the penalty due date is.

The bottom of the screen shows a small graph with recent usage and a table with more specific information. To view more detailed information about usage, see Usage.

If there is more than one customer associated with an account, a different account can be selected from the menu at the top right to view that customer's bill.

Bill messages will appear here, if a message has been entered in the Print Bills screen in UMS.

To view charges for a previous bill, see History.

Bill

Demo

Account	Account Name	Service Address

Service Description	Reading Dates	Previous Reading	Present Reading	Actual	Therm Factor	Meter Mult	Mult Usage	Charges
BF							0	$128.02
WT	09/11-11/02	353	394	41	1	1	41	$28.83
WT							0	
							0	$23.37
SW							0	$25.95
SC							0	$0.86

Net Due Upon Receipt	$207.03	Harvest Festival Oct. 6&7
Penalty Due Date		
Penalty Amount	$5.57	
Amount Due After Due Date	$212.60	

WT Monthly Usage

Period	Days	Usage	Daily Avg.
Current Billing Period	52	41	41
Previous Billing Period	31	70	70
Same Period Last Year	24	31	31
GCA			

Office Hours: Mon - Fri (8:00 am - 4:00 pm)   **Office Phones:**   **Office Fax:**

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OTHER OPTIONS

At the top right of the screen, users will see the email address associated with this account. Click here to view some extra options.

Profile

Change Password

Logout

Profile

Click this option to change select information about the user's account: First Name, Last Name, Email, Phone Number, or whether or not to receive email notices. Click Save at the top right to save any changes.

Profile		Save
First Name	**Last Name**	**Email**
Phone Number		
OFF Email Notice		

> ℹ Users will lose the ability to reset a password without assistance from the utility's web portal manager if their email account is invalid or is no longer accessible. Use this screen to enter a new email address if the original address is no longer accessible or is invalid.

Change Password

To change a password, click **Change Password**. A window will open asking for the current password, the new password, and a confirmation of the new password. Click *Submit* to complete the process.

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> ℹ️ If the password has been lost or forgotten, choose **Forgot Password** on the **Login** screen.

Sign Out

Click this option to log out of the web portal.