



Dataprise EBizCharge  
Customer Payment Portal:  
User Guide

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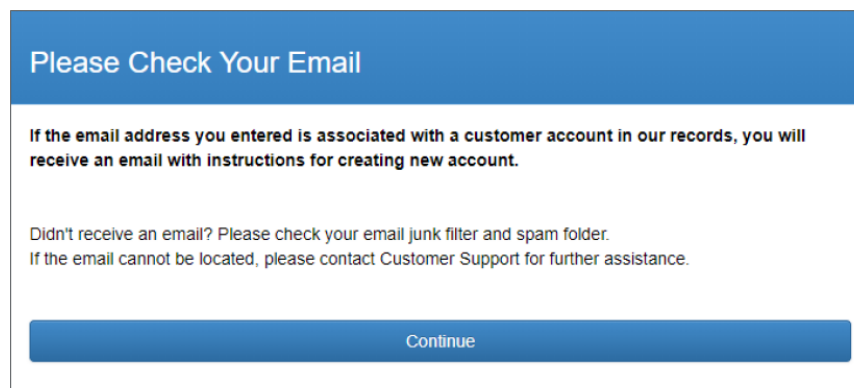
## 1. EBizCharge Customer Payment Portal

Dataprise's EBizCharge Customer Payment Portal allows users to manage their customer payment settings and is a customer facing portal. To understand and assist customers, this section covers the customer-facing experience in the Customer Payment Portal.

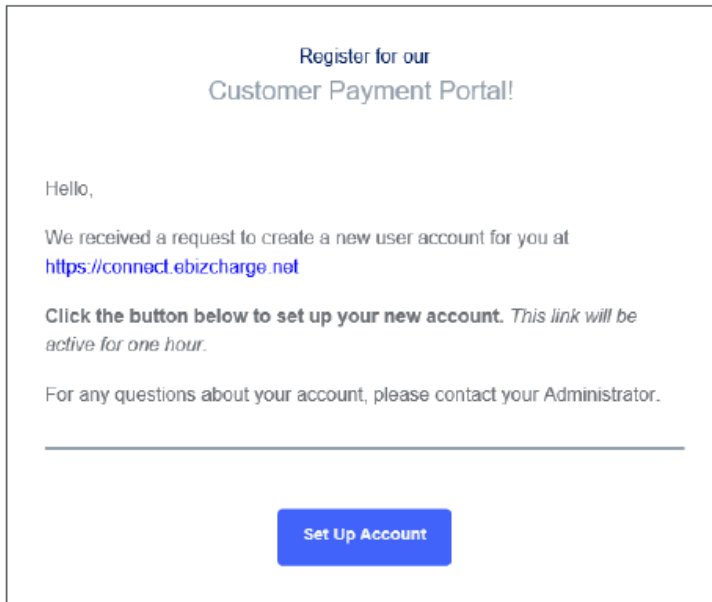
### 1.1. New User

Customers can create their own accounts for the Customer Payment Portal. To do so, the customer record inside the Customer Payment Portal needs to have an email address saved on file. Alternatively, a user id may be created on behalf of the customer with temporary credentials. To make this request, please contact Dataprise Accounts Receivable at [accountsreceivable@dataprise.com](mailto:accountsreceivable@dataprise.com).

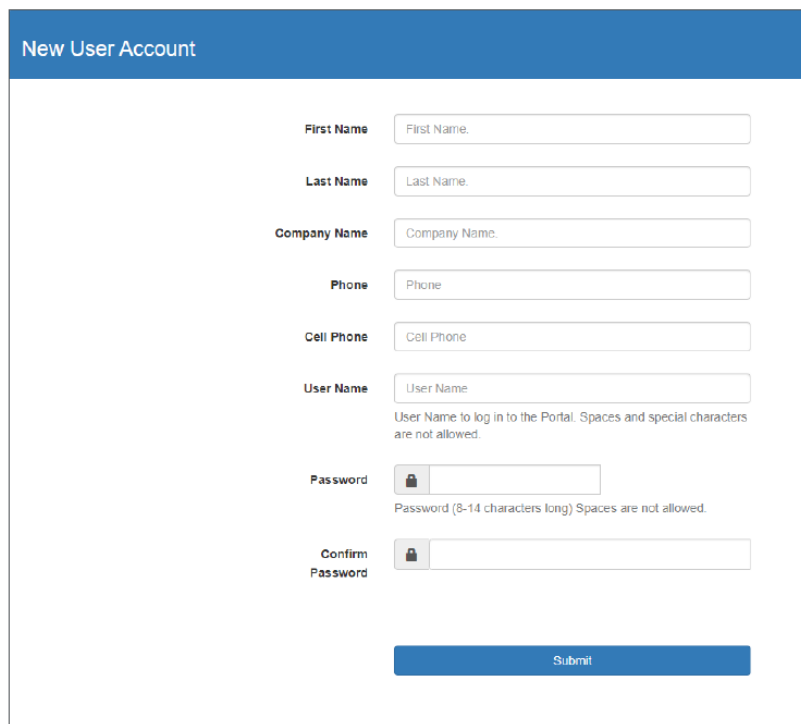
1. Navigate browser to <https://connect.ebizcharge.net/>.
2. Click on the **Create Account** link under the login button.
3. Enter the email address associated with the customer's account inside the merchant's instance and hit **Next**.
4. Input the customer id associated with the customer account inside the merchant's instance and hit **Register**.



5. Click **Continue** and the email is sent to the customer's inbox.



6. From the received email, press the **Set Up Account** button.
7. Enter optional profile details such as first and last name, company name, and any phone numbers.
8. Choose and enter a **Username**. The username is used at the login screen.
9. Enter the desired **Password** and then re-enter it in the **Confirm Password** field.



**New User Account**

**First Name**

**Last Name**

**Company Name**

**Phone**

**Cell Phone**

**User Name**   
User Name to log in to the Portal. Spaces and special characters are not allowed.

**Password**   
Password (8-14 characters long) Spaces are not allowed.

**Confirm Password**

**Submit**

10. Press the **Submit** button.
11. At the success message, click **Continue** to return to the login page.
12. Insert credentials to log in.

## 1.2. Log In

When the customer has completed registration or has been configured from within the Admin Portal, they will do the following:

1. Navigate browser to <https://connect.ebizcharge.net/>.
2. Enter **Username**.
3. Input **Password**.
4. Press the **Log In** button.

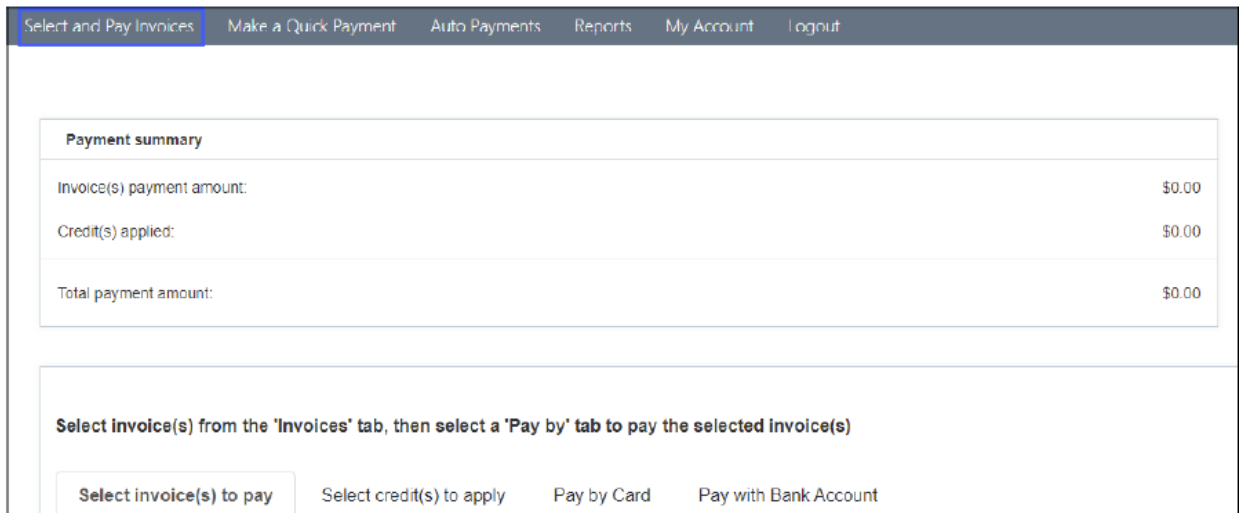
The customer's front page will show their **Payment Information**, with open invoices already displayed. Customers can return to this page at any time by clicking **Select and Pay Invoices** in the top menu.

On the **Payment Information** page, customer can select a date range using the **From Date** and **To Date** fields to narrow down results.

## 2. Select and Pay Invoices

The **Select and Pay Invoices** page is the first screen customers will see once they successfully log into the Customer Payment Portal. A list of open invoices will appear on the customer's **Select and Pay Invoices** page.

These are invoices generated inside of the integration that automatically sync up with the **Customer Payment Portal**.



Payment summary	
Invoice(s) payment amount:	\$0.00
Credit(s) applied:	\$0.00
Total payment amount:	\$0.00

Select invoice(s) from the 'Invoices' tab, then select a 'Pay by' tab to pay the selected invoice(s)

There are two summary boxes on the **Select and Pay Invoices** page:

1. **Payment Summary**
2. **Account Summary**

### 2.1. Payment Summary

The **Payment Summary** will show the total payment amount indicated by the selected invoice(s). If partial payments are turned off, the full balance of the invoice will display. Otherwise, the amount entered as a partial payment will display.

Payment summary	
Invoice(s) payment amount:	\$159.00
Credit(s) applied:	\$0.00
Total payment amount:	\$159.00

## 2.2. Account Summary

The **Account Summary** will display the total amount due on the customer's open invoices.

Your account summary	
Total invoice(s) amount due:	\$0
Total credits:	\$0
Total amount due:	\$0

There are three tabs available here to select and pay invoices:

- a. **Select Invoice(s) to pay**
- b. **Pay by Card**
- c. **Pay with Bank Account**

Select invoice(s) from the 'Invoices' tab, then select a 'Pay by' tab to pay the selected invoice(s)

Select invoice(s) to pay
Select credit(s) to apply
Pay by Card
Pay with Bank Account

From Invoice Date

To Invoice Date

Invoice#:

<input type="checkbox"/>	Invoice#	Date	Due Date	Currency	Orig. Amount	Amount Due *	Payment	R
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## 2.3. How to Pay Invoices

To pay by credit card, begin from the **Select and Pay Invoices** page:

1. Select the applicable invoice(s) to mark eligible for payment.
2. Click on the **Pay by Card** tab.
3. Select from the **Saved Cards** tab or enter the required information for a **New Card**.
4. Press the **Pay Now** button.

When the New Card option is selected the following information has to be populated as shown in the screenshot before selecting Pay Now. The credit card fee disclaimer will only display if the merchant has opted into surcharging their customers.

Select invoice(s) from the 'Invoices' tab, then select a 'Pay by' tab to pay the selected invoice(s)

Select invoice(s) to pay    Select credit(s) to apply    **Pay by Card**    Pay with Bank Account

**New Card**    Saved Cards

If you choose to pay with a **credit** card, you'll be charged a 3% Surcharge. If you choose to pay with a debit card, you won't be charged any fee.

Card Number \*  
4000100111112223

Billing Zip / Postal Code \*  
92618

Name on Card \*  
Falza Khan

Billing Address \*  
20 Pacifica 1450, Century Business Solutions

Expiration Date \*    \*    Security Code \*  
09    2022    124  
What is the Security Code?

3% Surcharge	\$0.00
<b>Total Payment Amount</b>	<b>\$0.00</b>

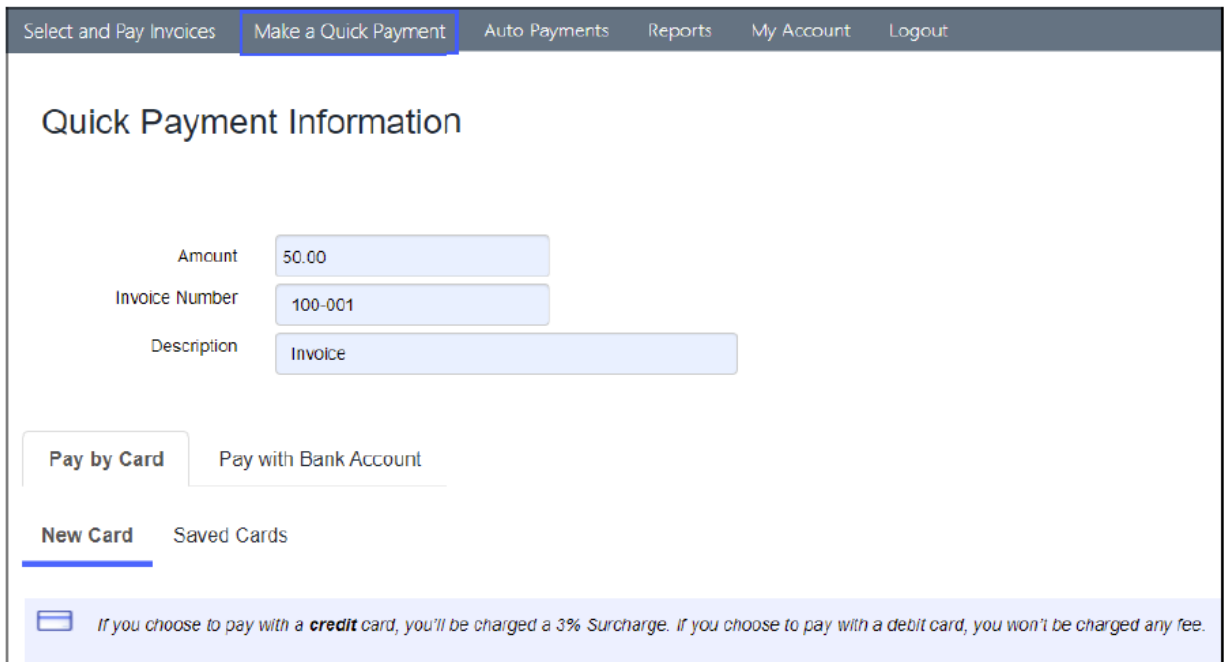
**Pay Now**

A success message will display. From this screen, you can email a receipt of the transaction. To pay by Bank Account, begin from the **Payment Information** page:

1. Select the applicable invoice(s) to mark eligible for payment.
2. Click on the **Pay with Bank Account** tab.
3. Select from the **Saved Bank Accounts** tab or enter the required information for a **New Bank Account**.
4. Agree to the **Terms and Conditions**.
5. Press the **Pay Now** button.

### 3. Make a Quick Payment

The **Make a Quick Payment** tab allows users to enter payment information and pay the outstanding amounts in a single page. The purpose of this page is more that it allows a customer to pay any amount they would like as opposed to selecting a specific invoice with an outstanding balance to pay.



The screenshot shows the 'Make a Quick Payment' interface. At the top, there is a navigation bar with tabs: 'Select and Pay Invoices', 'Make a Quick Payment' (which is highlighted), 'Auto Payments', 'Reports', 'My Account', and 'Logout'. Below the navigation bar, the main heading is 'Quick Payment Information'. The form contains three input fields: 'Amount' with the value '50.00', 'Invoice Number' with the value '100-001', and 'Description' with the value 'Invoice'. Below these fields, there are two radio button options: 'Pay by Card' (which is selected) and 'Pay with Bank Account'. Underneath, there are two sub-options: 'New Card' (which is underlined) and 'Saved Cards'. At the bottom of the form, there is a blue informational banner with a credit card icon and the text: 'If you choose to pay with a **credit** card, you'll be charged a 3% Surcharge. If you choose to pay with a **debit** card, you won't be charged any fee.'

The **Make a Quick Payment** tab allows users to enter payment information and pay the outstanding amounts in a single page.

## 4. Auto Payments

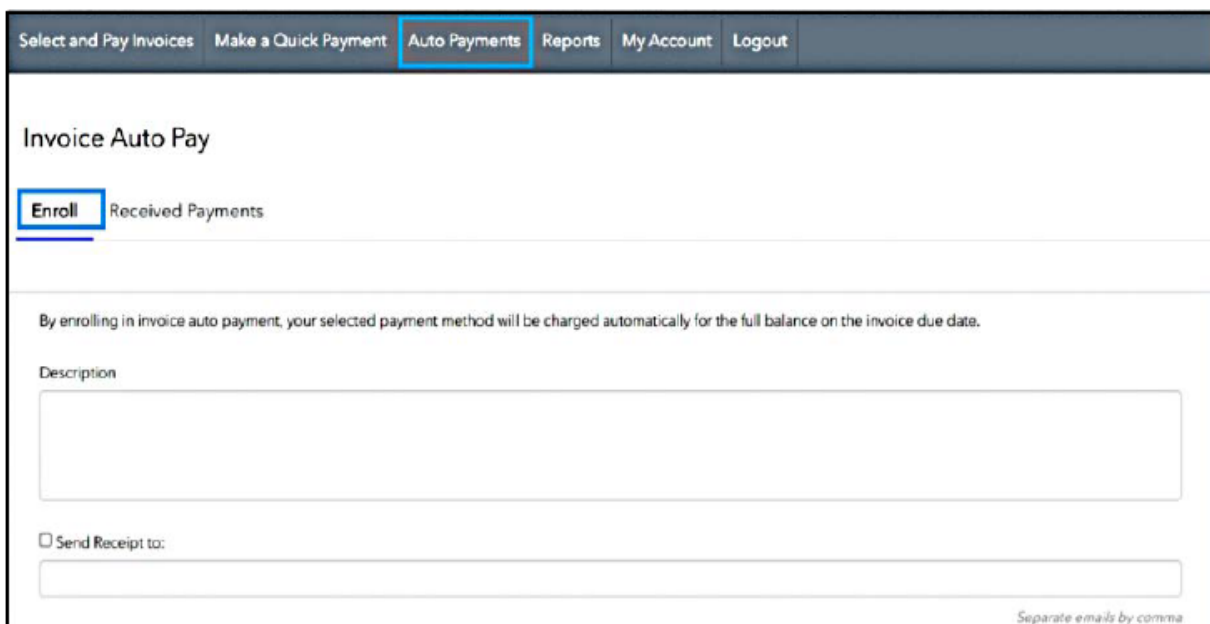
The **Auto Payments** tab allows access to **Invoice Auto Payments** which includes:

1. **Enroll**
2. **Received Payments**

### 4.1. Enroll

Select **Auto Payments > Invoice Auto Pay > Enroll** to access this option.

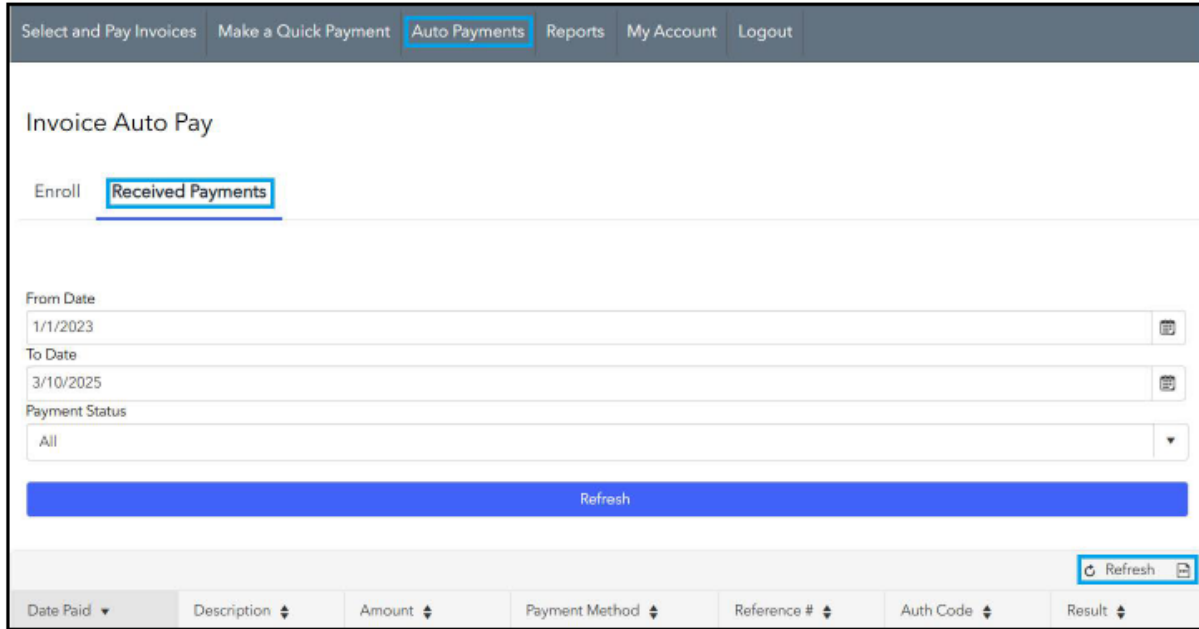
By enrolling in **Invoice Auto Pay** your selected payment method will be charged automatically for the full balance of each open invoice on the invoice due date.



The screenshot shows a web interface for 'Invoice Auto Pay'. At the top, there is a navigation bar with links: 'Select and Pay Invoices', 'Make a Quick Payment', 'Auto Payments' (highlighted with a red box), 'Reports', 'My Account', and 'Logout'. Below the navigation bar, the page title is 'Invoice Auto Pay'. Underneath, there are two tabs: 'Enroll' (highlighted with a red box) and 'Received Payments'. A paragraph of text states: 'By enrolling in invoice auto payment, your selected payment method will be charged automatically for the full balance on the invoice due date.' Below this text is a 'Description' label followed by a large empty text input field. At the bottom, there is a checkbox labeled 'Send Receipt to:' followed by an empty text input field. In the bottom right corner of the form area, there is a small note: 'Separate emails by comma'.

## 4.2. Received Payments

The **Received Payments** option shows a list of all the auto payments that have occurred. The **Refresh** button allows the list to populate any changes made and can be downloaded in an Excel or PDF format, as desired.

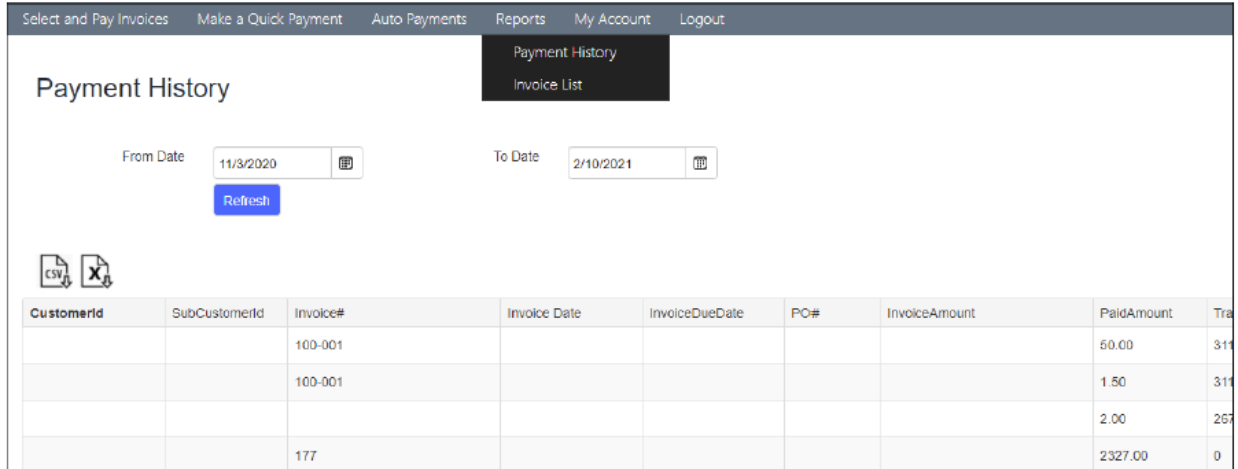


The screenshot shows the 'Invoice Auto Pay' section of a web application. At the top, there is a navigation bar with links: 'Select and Pay Invoices', 'Make a Quick Payment', 'Auto Payments' (highlighted), 'Reports', 'My Account', and 'Logout'. Below this, the page title is 'Invoice Auto Pay'. Underneath, there is an 'Enroll' section with a button labeled 'Received Payments' (highlighted). The main area contains three filter fields: 'From Date' with the value '1/1/2023', 'To Date' with the value '3/10/2025', and 'Payment Status' with the value 'All'. A large blue 'Refresh' button is positioned below these filters. At the bottom right of the filter area, there is a smaller 'Refresh' button with a circular arrow icon and a download icon. Below the filters is a table header with the following columns: 'Date Paid', 'Description', 'Amount', 'Payment Method', 'Reference #', 'Auth Code', and 'Result'. Each column header has a small downward arrow icon next to it.

## 5. Reports

The **Reports** tab has two reports to view:

1. **Payment History**
2. **Invoice List**

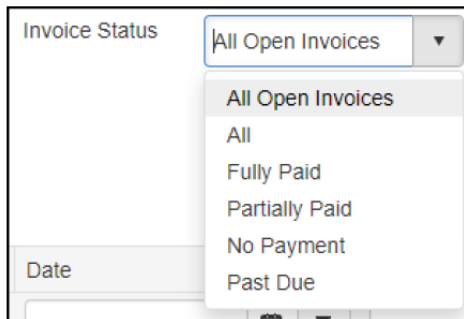


### 5.1. Payment History

1. Hover on the **Reports** tab.
2. Click on **Payment History**.
3. Select a **From Date** for the starting date range.
4. Select a **To Date** for the ending date range.
5. Press the **Refresh** button to display results.

### 5.2. Invoice List

1. Hover on the **Reports** tab.
2. Click on **Invoice List**.
3. Select a **From Invoice Date** for the starting date range.
4. Select a **To Invoice Date** for the ending date range.
5. Optional: Filter the invoice results with the **Invoice Status** dropdown.
6. Press the **Refresh** button.

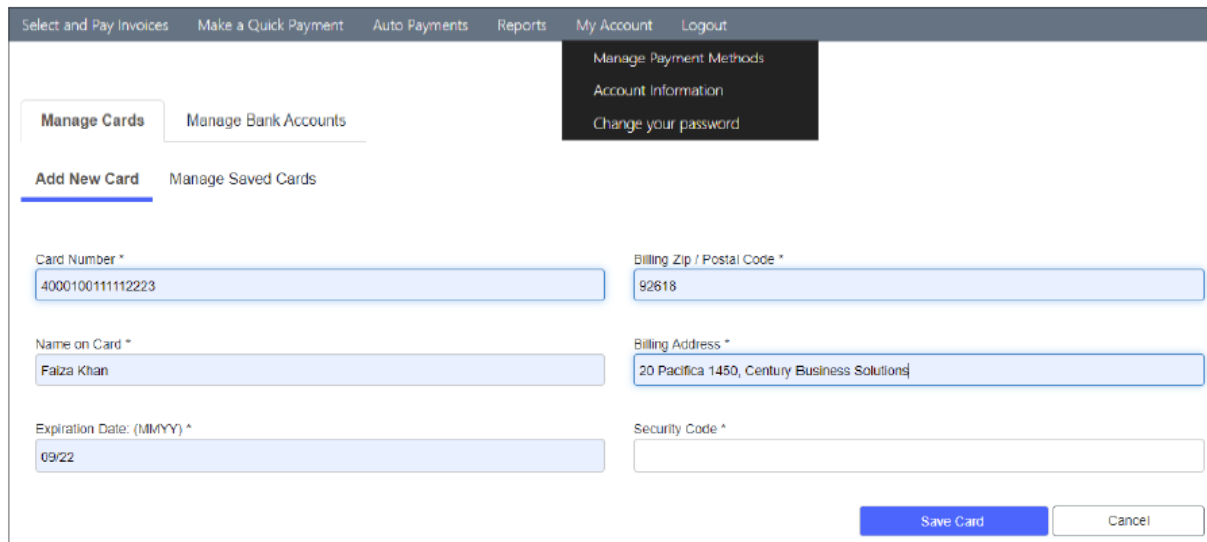


## 6. My Account

The **My Account** tab allows customers to manage their payment methods, update their account information, and change their Customer Payment Portal password.

There are two options under the My Account tab:

1. **Manage Payment Methods**
2. **Account Information**



To access the **My Account** tab:

1. Hover on the **My Account** tab.
2. Select either **Manage Payment Methods**, **Account Information**, or **Change your password**.

### 6.1. Manage Payment Methods

Customers can:

- a. Add new credit cards or bank accounts.
- b. Modify existing credit cards or bank accounts.
- c. Remove existing credit cards or bank accounts.

Customers can navigate between the **Manage Credit Cards** and **Manage Bank Accounts** tabs to add new credit cards or bank accounts and to manage saved credit cards or bank accounts.

**Manage Cards** | Manage Bank Accounts

**Add New Card** | Manage Saved Cards

Card Number \*

Billing Zip / Postal Code \*

Name on Card \*

Billing Address \*

Expiration Date: (MMYY) \*

Security Code \*

**Save Card** | Cancel

**For new credit cards:**

These fields are required to add new credit cards:

1. Enter the **Card Number**.
2. Input the **Name on Card**.
3. Enter the **Expiration Date** in MMYE format.
4. Input the **Billing Zip/Postal Code** address.
5. Enter the **Billing Address**.
6. Add the **Security Code**.
7. Press the **Save Card** button.

**For saved credit cards:**

1. Click on **Select** to populate the field data.
2. Optional: Update credit card information if desired. **Note:** The **Credit Card Number** cannot be edited.
3. Select the **Save Selected Card** button if updates were made or the **Delete Selected Card** button to remove.

Adding and managing **Bank Accounts** works similarly.

## 6.2. Account Information

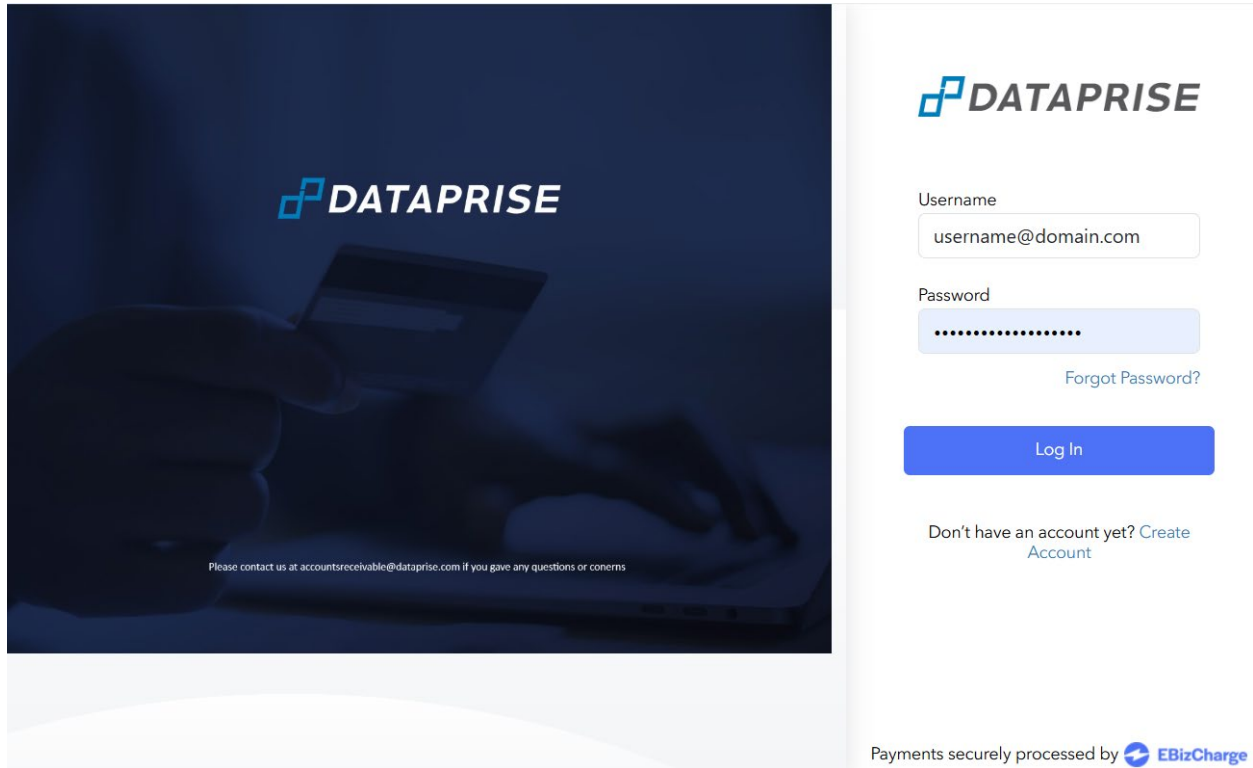
In the **Account Information** option customers can update their personal information within EBizCharge.

### **Note**

If a password reset is needed, please contact **Dataprise** directly at [accountsreceivable@dataprise.com](mailto:accountsreceivable@dataprise.com) to receive an activation email.

## 7. Logout

The **Logout** tab allows users to securely log out of the Customer Payment Portal after navigating through EBizCharge. Click on the **OK** button to go back to the landing page.



## 8. Payment Portal Support

If you have questions regarding the Dataprise Customer Payment Portal or are experiencing technical difficulties with the system, contact Dataprise Accounts Receivable at [accountsreceivable@dataprise.com](mailto:accountsreceivable@dataprise.com)