

Payment Portal Reference Guide

Otis Payment Portal



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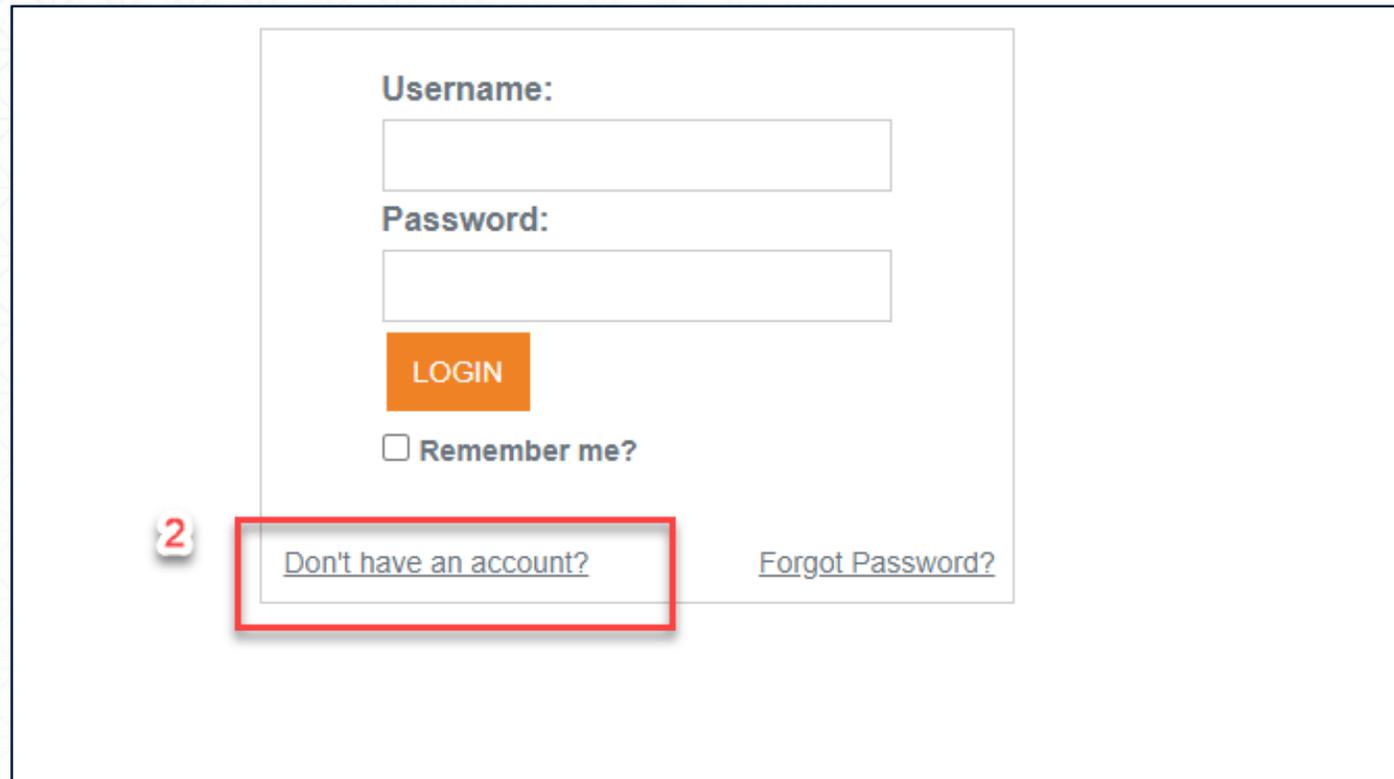
Creating an Account



Creating an Account

Step 1: Click on Link to get to payment portal Login Screen- <https://otis.payinvoicedirect.com/>

Step 2: To create an account, click on don't have an account



The screenshot shows a login form with the following elements:

- Username:** A text input field.
- Password:** A text input field.
- LOGIN:** An orange button.
- Remember me?**
- Don't have an account?** A link highlighted with a red box and a red '2' next to it.
- Forgot Password?** A link.

Sample of Invoice and where to find Customer Number, Invoice Number, and Zip Code . *Use the zip code on the payment coupon.

DETACH DOCUMENT ALONG PERFORATION. ENCLOSE AND RETURN THIS COUPON WITH YOUR PAYMENT.

OTIS

5500 Village Blvd, Suite 102 West Palm Beach FL 33407

First Otis Buidling
1234 Otis Drive
West Palm Beach, FL 12345

C

CUSTOMER NO.:

A

12345678

DATE:

6/15/2020

INVOICE NO.:

B

100400000005

TOTAL SERVICE CONTRACT AMOUNT:

\$ 194.98

MAKE CHECK PAYABLE TO:

Otis Elevator Company
PO Box 13716
Newark NJ 07188-0716

100400012736 0000019498 5

OTIS

Otis Elevator Company. 2020



Signature
Service™

Fill in all fields and click Continue

HOME | REGISTRATION

Registration

PROVIDE YOUR REGISTRATION INFORMATION

-Customer Account Number*
12345678

-Invoice Number*
1004000005

-Zip Code*
12345

-First Name*
Joe

-Last Name*
Otis

-Email Address*
Joe.Otis@Otis.com

-Password*
.....

-Confirm Password*
.....

Password requires: at least 6 alphanumeric characters; requires at least one letter and one digit.

[Clear](#) | [CONTINUE](#)

The first screen you will be taken to is all open invoices on the account.

Making a Payment



Making a Payment

To make a payment, click on the invoices you wish to pay in the box next to the open amount. When you click on the box, the open amount will default into the payment amount field.

The screenshot displays the 'ACCOUNT' section of the Otis Signature Service portal. At the top, there is a navigation bar with the Otis Signature Service logo, a customer ID dropdown (759684), and buttons for 'CHANGE CUSTOMER NUMBER', 'UPDATE BILLING PREFERENCES', and 'LOG OUT'. Below this is a search section titled 'View Open Invoices' with filters for 'Exact Search' (Invoice Number, Invoice Date, Document Type), 'Date Range' (From Date, To Date), and 'Invoice Number Range' (Invoice Number From, Invoice Number To). A 'FIND INVOICES' button is centered below the filters. On the right, it states 'Total of All Open Invoices: \$110,600'. The main area contains a table of open invoices with columns for Invoice Number, Document Type, Date, Days Past Due, Due Date, Total Amount, Open Amount, a checkbox, and a field for the payment amount. Each row also has a 'Print' link.

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount	<input type="checkbox"/>	Amount	Print
100400066085	Maintenance Invoice	5/23/2020	16	5/23/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>	<input type="text"/>	Print
100400036477	Maintenance Invoice	4/28/2020	41	4/28/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>	<input type="text"/>	Print
100400014200	Maintenance Invoice	3/23/2020	77	3/23/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>	<input type="text"/>	Print
CY520419 001	Open Order Invoice	2/25/2020	104	2/25/2020	\$45,413.88	\$45,413.88	<input type="checkbox"/>	<input type="text"/>	Print
CY520472 001	Open Order Invoice	2/25/2020	104	2/25/2020	\$19,028.75	\$19,028.75	<input type="checkbox"/>	<input type="text"/>	Print
CY505595 320	Maintenance Invoice	2/20/2020	109	2/20/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>	<input type="text"/>	Print
CY520349 001	Open Order Invoice	1/28/2020	132	1/28/2020	\$2,096.00	\$2,096.00	<input type="checkbox"/>	<input type="text"/>	Print
CY505595 220	Maintenance Invoice	1/20/2020	140	1/20/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>	<input type="text"/>	Print
101000536163	Credit Memo	8/27/2019	286	8/27/2019	-\$182.44	-\$182.44	<input type="checkbox"/>	<input type="text"/>	Print

<< < > >> Total record found: 9. Displaying record 1 to 9.

After selecting the invoices for payment, select proceed to payment button in the bottom right corner. (Important to note that if you do not include the full open amount of the invoice in the payment amount field, it will prompt you to enter a reason for not paying the full amount.)

The screenshot displays the 'ACCOUNT' management page for Otis Signature Service. At the top, there is a customer number '758884' and buttons for 'CHANGE CUSTOMER NUMBER' and 'UPDATE BILLING PREFERENCES'. Below this is a search section for 'View Open Invoices' with filters for 'Exact Search' (Invoice Number, Invoice Date, Document Type), 'Date Range' (From Date, To Date), and 'Invoice Number Range' (Invoice Number From, Invoice Number To). A 'FIND INVOICES' button is centered below the filters. On the right, it states 'Total of All Open Invoices: \$116,906.19'. The main area contains a table of invoices with columns for Invoice Number, Document Type, Date, Days Past Due, Due Date, Total Amount, Open Amount, a checkbox for selection, and an 'Amount' field with a 'Print' link. The table lists 10 invoices, including maintenance and open order invoices. At the bottom right, there is a 'PROCEED TO PAYMENT' button.

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount	<input type="checkbox"/>	Amount	Print
100400066085	Maintenance Invoice	5/23/2020	16	5/23/2020	\$8,850.00	\$8,850.00	<input checked="" type="checkbox"/>	8850.00	Print
100400036477	Maintenance Invoice	4/26/2020	41	4/26/2020	\$8,850.00	\$8,850.00	<input checked="" type="checkbox"/>	4850.00	Print
100400014200	Maintenance Invoice	3/23/2020	77	3/23/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
CYS20419 001	Open Order Invoice	2/25/2020	104	2/25/2020	\$45,413.88	\$45,413.88	<input type="checkbox"/>		Print
CYS20472 001	Open Order Invoice	2/25/2020	104	2/25/2020	\$19,028.75	\$19,028.75	<input type="checkbox"/>		Print
CYS0595 330	Maintenance Invoice	2/20/2020	109	2/20/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
CYS20349 001	Open Order Invoice	1/28/2020	132	1/28/2020	\$2,096.00	\$2,096.00	<input type="checkbox"/>		Print
CYS0595 220	Maintenance Invoice	1/20/2020	140	1/20/2020	\$8,850.00	\$8,850.00	<input type="checkbox"/>		Print
101000536163	Credit Memo	8/27/2019	286	8/27/2019	\$182.44	\$182.44	<input type="checkbox"/>		Print

After clicking proceed to payment, you will be taken to this screen below where you can choose payment method that you have previously saved, add a new payment method, and also have the option to split the payment between multiple payment methods saved on your account. (We are unable to accept credit card payments of over \$49,999.00, or on new equipment or modernization invoices. There is no limit on the amount accepted by e-check)

Invoices Selected for Payment

Invoices

Invoice Number	Invoice Type	Invoice Company	Currency	Amount Applied	Paid Amount	Remaining Amount	
200000020130	New Equipment/Mod Invoice	00130	BSD	49,000.00	0.00	63,097.38	REMOVE

GO BACK REMOVE ALL UNPAID LINES

Reason for not paying full invoice amount:

This field is required if total payment amount does not match open invoice amount

Choose a payment method

Your saved payment methods

+  Pay with new method Credit Card eCheck

Total Summary

Subtotal :	49,000.00
Tax :	0.00
Total :	49,000.00
Remaining Balance :	49,000.00
	BSD

Use this payment method

When payment has been successfully completed, you will receive an email with the below information:

Paid Invoices										
Invoice #	Pay Item	Type	Company	Amount Applied	Discount Taken	Paid Amount	Remaining Amount	Status	Payment Id	Batch Number
110400093819	001	Maintenance Invoice	00110	100.00	0.00	100.00	2,348.12	Complete		

Transaction History								
Account	Transaction Type	Amount	Gateway Transaction Id	Authorization Number	Message	Status	Created	Created By
XXXXXXXXXXXX1111	SALE	100	5ED7C01327F9EB17A99F745A8B8E774F094D53C8		Approved and Completed	APPROVED	2020/06/03 15:22:12	sean.qa@test.com

Hovering over account as shown below will bring up an option menu to see receipts for past payments, manage payment profiles, and change your settings.

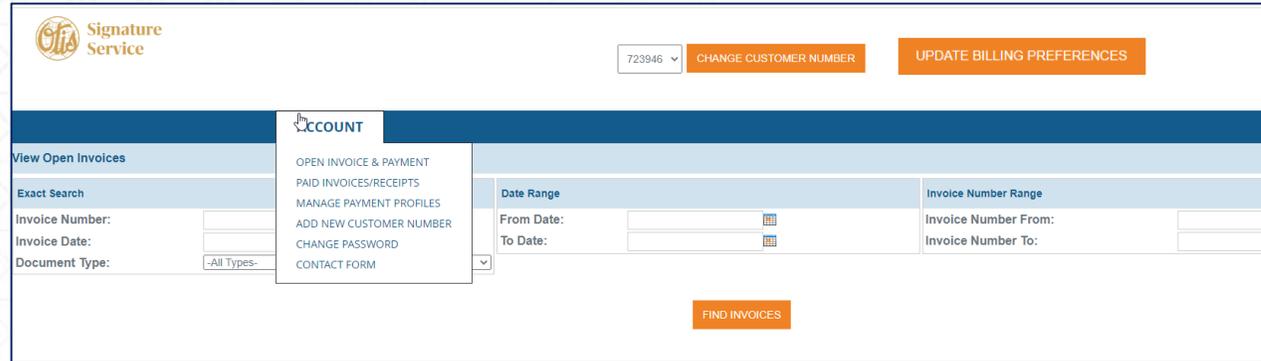
The screenshot shows the Signature Service web interface. At the top, there is a logo, a dropdown menu with the value '49275108', and two buttons: 'CHANGE CUSTOMER NUMBER' and 'UPDATE BILLING PREFERENCES'. Below this is a navigation bar with 'ACCOUNT' highlighted. A dropdown menu is open under 'ACCOUNT', listing several options: 'OPEN INVOICE & PAYMENT', 'PAID INVOICES/RECEIPTS' (highlighted with a red box), 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER', 'CHANGE PASSWORD', 'CONTACT FORM', 'AUTOPAY ACCOUNTS', and 'UPDATE BILLING PREFERENCES'. To the left of the dropdown menu are search filters: 'View Open Invoices', 'Exact Search' (with fields for Invoice Number, Invoice Date, and Document Type), 'Date Range' (with fields for From Date and To Date), and 'Invoice Number Range' (with fields for Invoice Number From and Invoice Number To). At the bottom right, there is a 'FIND INVOICES' button.

Adding additional customer numbers to your profile

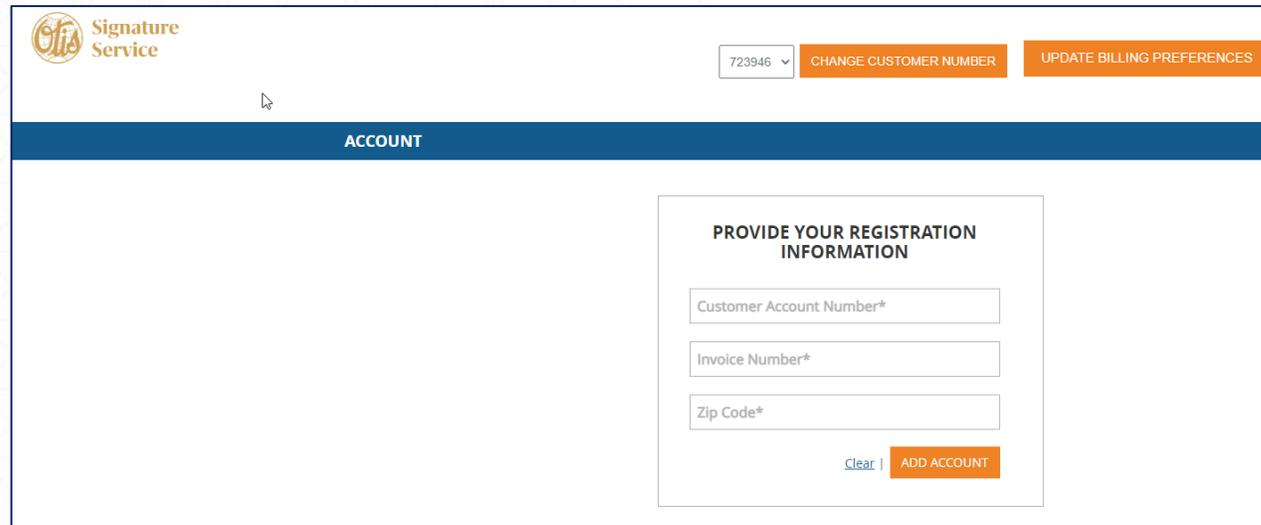


Adding additional customer numbers to your profile

Hover over account and select add new customer number.



The screenshot shows the Otis Signature Service account management interface. At the top, there is a header with the Otis Signature Service logo, a dropdown menu showing '723946', and two buttons: 'CHANGE CUSTOMER NUMBER' and 'UPDATE BILLING PREFERENCES'. Below the header, there is a navigation bar with 'ACCOUNT' selected. A dropdown menu is open under 'ACCOUNT', listing options: 'OPEN INVOICE & PAYMENT', 'PAID INVOICES/RECEIPTS', 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER', 'CHANGE PASSWORD', and 'CONTACT FORM'. To the left of the dropdown, there is a 'View Open Invoices' section with an 'Exact Search' form containing fields for 'Invoice Number:', 'Invoice Date:', and 'Document Type:' (with a dropdown set to '-All Types-'). To the right of the dropdown, there is a 'Date Range' section with 'From Date:' and 'To Date:' fields, and an 'Invoice Number Range' section with 'Invoice Number From:' and 'Invoice Number To:' fields. A 'FIND INVOICES' button is located below these search sections.



The screenshot shows the Otis Signature Service account management interface. At the top, there is a header with the Otis Signature Service logo, a dropdown menu showing '723946', and two buttons: 'CHANGE CUSTOMER NUMBER' and 'UPDATE BILLING PREFERENCES'. Below the header, there is a navigation bar with 'ACCOUNT' selected. The main content area is titled 'ACCOUNT' and contains a form titled 'PROVIDE YOUR REGISTRATION INFORMATION'. The form has three input fields: 'Customer Account Number*', 'Invoice Number*', and 'Zip Code*'. Below the fields, there is a 'Clear' link and an 'ADD ACCOUNT' button.

You will then be able to add additional accounts and toggle between them by clicking on the change customer number and selecting from the drop down.

The screenshot displays a web interface with a dropdown menu and a registration form. The dropdown menu is open, showing three options: '723946' (selected), '723946', and '49275108'. To the right of the dropdown is an orange button labeled 'CHANGE CUSTOMER NUMBER'. Below this is a dark blue horizontal bar. Underneath is a white box with the heading 'PROVIDE YOUR REGISTRATION INFORMATION'. This box contains three input fields: 'Customer Account Number*', 'Invoice Number*', and 'Zip Code*'. At the bottom right of this box is a 'Clear' link and an orange 'ADD ACCOUNT' button.

Paying on Consolidated Invoices

If the invoice is consolidated (multiple contracts with different customer #'s), the payment must be made under each individual customer Number. (Follow steps to add multiple customer #'s)

The example below is of a consolidated invoice, you will see that the invoice number is repeated but under separate customer numbers. Each customer number should be added separately.

Invoice Number	Customer Number	Doc Co	Pay Item	Billing Line Number	Invoice Date	Pay Inst	Gross Amount	Open Amount	G/L Offset	Contract Number
100400001688	416346	00100	001		06/15/2020		1,236.00	1,236.00	0004	96103
100400001688	416349	00100	001		06/15/2020		1,854.00	1,854.00	0004	96130
100400001688	416350	00100	001		06/15/2020		1,854.00	1,854.00	0004	96134
100400001688	416351	00100	001		06/15/2020		1,854.00	1,854.00	0004	96137
100400001688	416346	00100	001		06/15/2020		26,883.00	5,171.40	0004	96715
							33,681.00	11,969.40		

How to Download a copy of your invoice



How to Download a copy of your invoice

If you need a copy of your invoice, you can click on print next to the open amount.

The screenshot shows the Otis Signature Service account portal. At the top, there is a header with the Otis logo and 'Signature Service' text. To the right of the header, there is a dropdown menu showing '4927510E', and two orange buttons: 'CHANGE CUSTOMER NUMBER' and 'UPDATE BILLING PREFERENCES'. Further right is a 'Log OUT' button. Below the header is a dark blue bar with the word 'ACCOUNT' in white. Underneath, there is a section titled 'New Open Invoices'. This section contains search filters: 'Exact Search' with fields for 'Invoice Number', 'Invoice Date', and 'Document Type'; 'Date Range' with 'From Date' and 'To Date' fields; and 'Invoice Number Range' with 'Invoice Number From' and 'Invoice Number To' fields. A 'FIND INVOICES' button is centered below these filters. To the right of the filters, it says 'Total of All Open Invoices: \$63,097.38'. Below this is a table with the following columns: Invoice Number, Document Type, Date, Days Past Due, Due Date, Total Amount, Open Amount, a checkbox, and Amount. The first row of data is: 200000020130, New Equipment/Mod Invoice, 1/31/2020, 178, 1/31/2020, \$588,908.88, \$63,097.38, a checked checkbox, and 49000.00. A 'Print' button is located to the right of the 'Amount' cell in this row and is highlighted with a red box. At the bottom left of the table, there are navigation arrows and the text 'Total record found: 1. Displaying record 1 to 1.'. At the bottom right, there is an orange button labeled 'PROCEED TO PAYMENT'.

That will download a reference article that contains pertinent invoice information, but is not an exact copy of the original invoice. If you need a copy of the original invoice, please contact NSAA.collections@otis.com. Below is an example of the Reference article you will see.

 Signature Service		REFERENCE ARTICLE			
		INVOICE NO. 20000002 U5		PAGE 1 of 1	
DATE 1/31/2020		ORDER #			
CUST NO. 49275108					
TAX I.D.		TAX CERTIFICATE			

BILL TO:
 First Otis Building
 1234 Otis Boulevard
 West Palm Beach, FL 12345

*Customer payment portal is being upgraded to display our newly formatted invoices. While we go through this process, you will be able to access your invoice information here, through this reference article. The customer information, bill to address, and invoice # and amount due shown here matches the information in the invoice mailed to you. Please reach out to NSAA.Collections@otis.com if you have any questions.

CURRENCY	ORDER DATE	CUSTOMER P.O.	TRANSPORT	
BSD				
SHIPPING INSTRUCTIONS				
LINE	DESCRIPTION / ITEM NUMBER	QTY SHIPPED	PRICE	EXTENDED PRICE
001		1	588908.88	588908.88

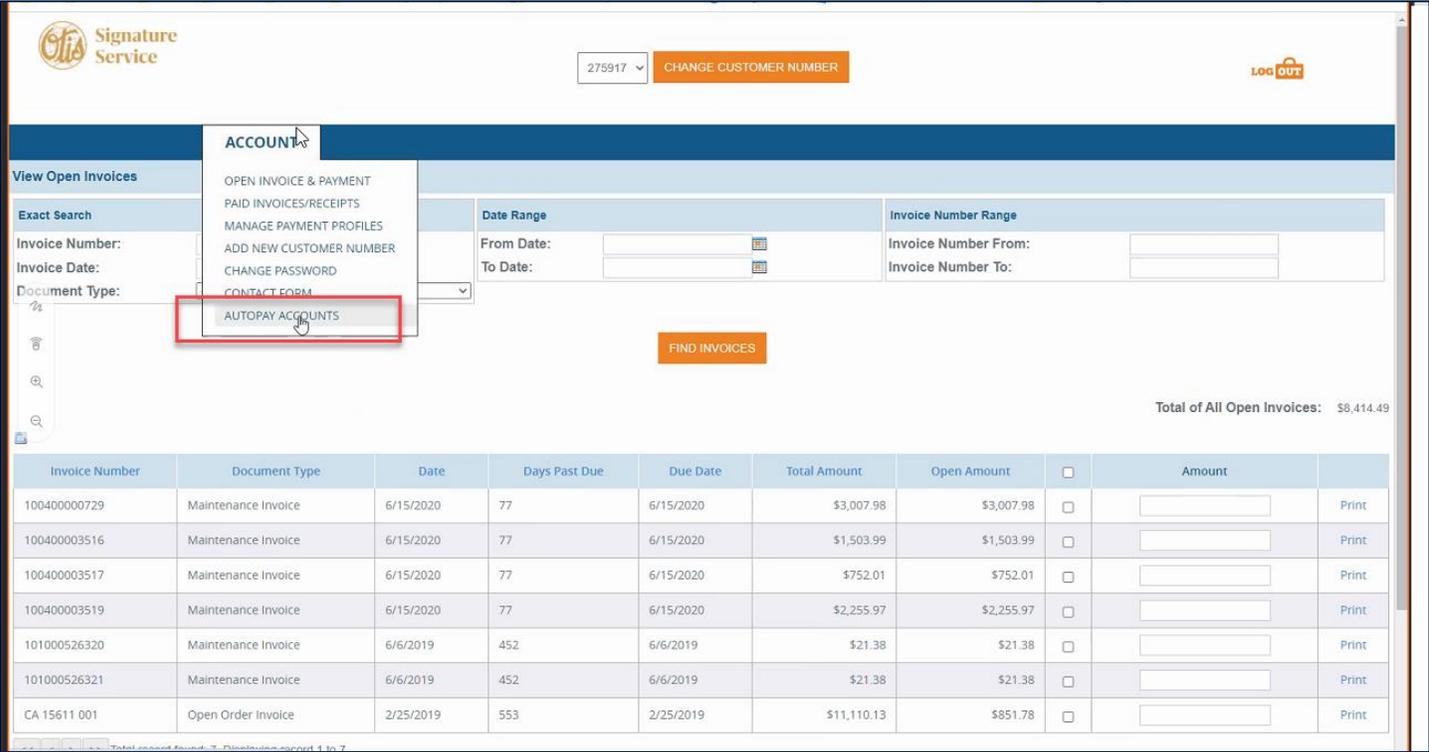
Recurring Payment Set Up (Credit Card or ACH)



How to set up Automatic Payments on Your Account

Make sure you have a payment profile saved first.

From your home screen when you login, select Autopay Accounts from the Account Dropdown.



You will then see the next screen and click add new autopay account as shown below:

The screenshot displays the Otis Signature Service account management interface. At the top left is the Otis Signature Service logo. To the right, there is a dropdown menu showing '275917', a 'CHANGE CUSTOMER NUMBER' button, and an 'UPDATE BILLING PREFERENCES' button. Further right is a 'LOG OUT' button with a lock icon. Below this is a dark blue header bar labeled 'ACCOUNT'. Underneath is a table with the following data:

Payment Profile	Payment On	Contract	Customer Number	
Visa ending in 6785	27	16414	314085	DELETE
Visa ending in 6785	27	16407	314085	DELETE
Ec ending in 5236	31		98467477	DELETE

Below the table is a pagination control: '<< < > >>' followed by the text 'Total records found: 3. Displaying record 1 to 3.' At the bottom left, there is a red-bordered button labeled 'ADD NEW AUTOPAY ACCOUNT'.

Select the day of the month that you want to have your payment withdrawn or charged to your credit card:

The screenshot displays the 'Auto Payment - EASYCommerce' window. The 'Auto Payment Frequency' is set to 'Monthly'. The 'Payment On' dropdown menu is open, showing a list of days from 1 to 20. A red box highlights the '1' option, which is also highlighted in blue. The background shows a table of payment profiles with columns for 'Payment Profile' and 'Day'.

Payment Profile	Day
Visa ending in 6785	27
Visa ending in 6785	27
Ending in 5236	31

Select the payment method that you want to use for the recurring payments:

The screenshot displays the 'Auto Payment - EASYCommerce' modal window. The modal contains the following fields and options:

- Auto Payment Frequency: Monthly
- Payment On: 31
- Payment Profile: Visa ending in 4115 (highlighted with a red box)
- Pay All Open Invoices: True False
- Contract: 10349
- ADD AUTOPAY ACCOUNT button

The background interface shows the 'ACCOUNT' section with a table of payment profiles:

Payment Profile	
Visa ending in 6785	27
Visa ending in 6785	27
Visa ending in 5236	31

Additional background elements include a 'Log Out' button, a 'Customer Number' column, and 'DELETE' buttons for each record in the table. A search bar and 'ADD NEW AUTOPAY ACCOUNT' button are also visible at the bottom left of the background interface.

Select the contract that you want to use for the recurring payments.

*In order to set up Autopay, there must be a new (within the last 30 days) invoice open on your account. If there is not, you will not see a contract available to select.

Auto Payment - EASYCommerce

Auto Payment Frequency: Monthly

Payment On: 1

Payment Profile: Visa ending in 4115

Pay All Open Invoices: True False

Contract: 10349

10349

10359

10373

10390

ADD AUTO COUNT

INT

Customer Number

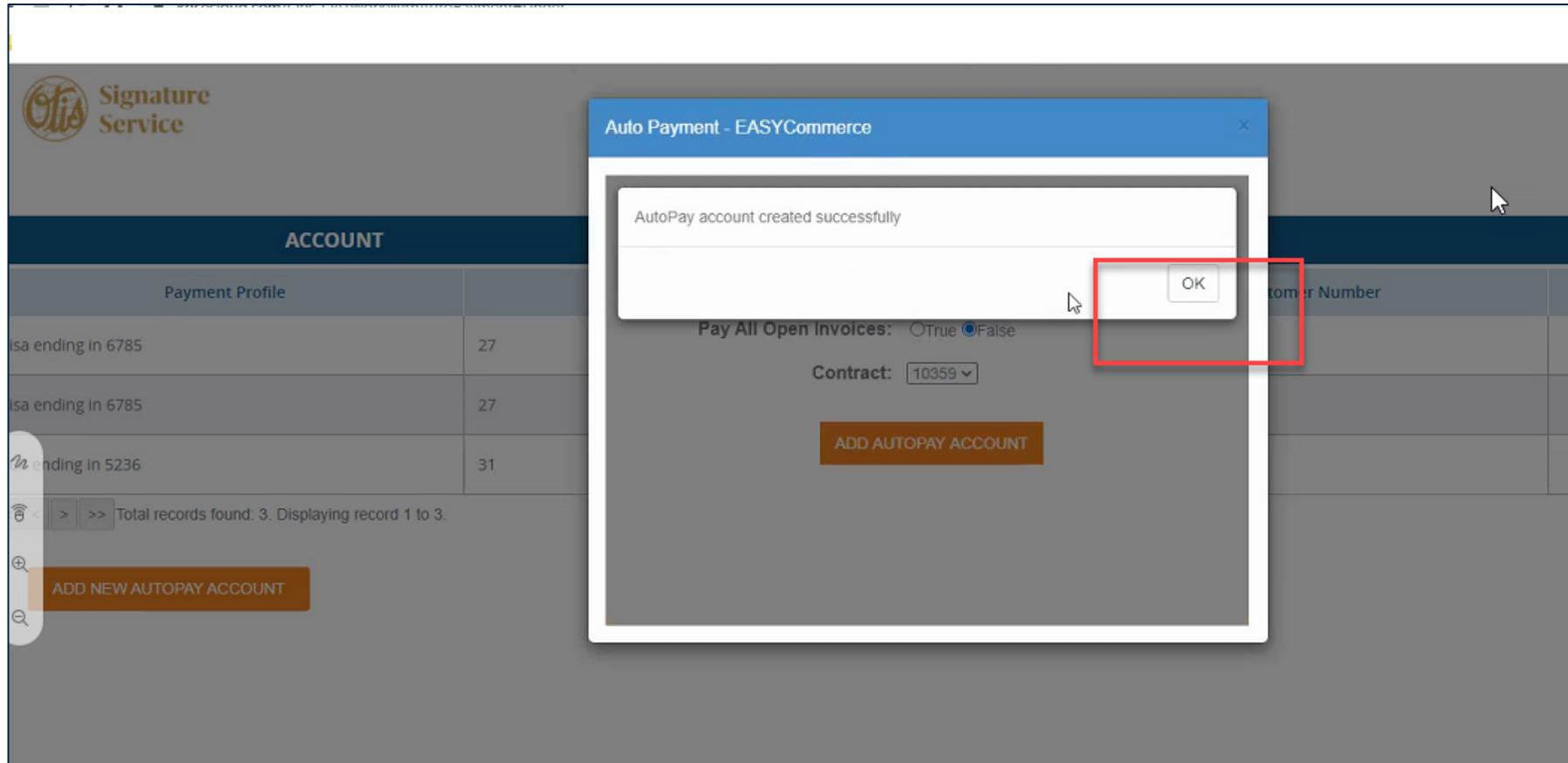
27

27

31

record 1 to 3.

You will see a message that the Autopay account has been created separately.



Updating Billing Preferences



Click on the orange button or from the drop down menu

The screenshot displays the Otis Signature Service web portal. At the top, there is a navigation bar with the Otis Signature Service logo on the left, a dropdown menu showing '275917', an orange button labeled 'CHANGE CUSTOMER NUMBER', another orange button labeled 'UPDATE BILLING PREFERENCES' (highlighted with a red box), and a 'LOG OUT' button on the right. Below the navigation bar is a dark blue header with the word 'ACCOUNT' in white. A dropdown menu is open under 'ACCOUNT', listing several options: 'OPEN INVOICE & PAYMENT', 'PAID INVOICES/RECEIPTS', 'MANAGE PAYMENT PROFILES', 'ADD NEW CUSTOMER NUMBER', 'CHANGE PASSWORD', 'CONTACT FORM', and 'AUTOPAY ACCOUNTS' (highlighted with a red box). To the left of the dropdown is a sidebar with 'View Open Invoices' and 'Exact Search' sections. The 'Exact Search' section includes fields for 'Invoice Number:', 'Invoice Date:', and 'Document Type:'. To the right of the dropdown are 'Date Range' and 'Invoice Number Range' sections, each with 'From Date:' and 'To Date:' fields. Below these is an orange 'FIND INVOICES' button. On the right side of the main content area, it says 'Total of All Open Invoices: \$8,414.49'. At the bottom is a table with the following columns: Invoice Number, Document Type, Date, Days Past Due, Due Date, Total Amount, Open Amount, a checkbox, Amount, and Print. The table contains seven rows of invoice data.

Invoice Number	Document Type	Date	Days Past Due	Due Date	Total Amount	Open Amount	<input type="checkbox"/>	Amount	Print
10040000729	Maintenance Invoice	6/15/2020	77	6/15/2020	\$3,007.98	\$3,007.98	<input type="checkbox"/>	<input type="text"/>	Print
100400003516	Maintenance Invoice	6/15/2020	77	6/15/2020	\$1,503.99	\$1,503.99	<input type="checkbox"/>	<input type="text"/>	Print
100400003517	Maintenance Invoice	6/15/2020	77	6/15/2020	\$752.01	\$752.01	<input type="checkbox"/>	<input type="text"/>	Print
100400003519	Maintenance Invoice	6/15/2020	77	6/15/2020	\$2,255.97	\$2,255.97	<input type="checkbox"/>	<input type="text"/>	Print
101000526320	Maintenance Invoice	6/6/2019	452	6/6/2019	\$21.38	\$21.38	<input type="checkbox"/>	<input type="text"/>	Print
101000526321	Maintenance Invoice	6/6/2019	452	6/6/2019	\$21.38	\$21.38	<input type="checkbox"/>	<input type="text"/>	Print
CA 15611 001	Open Order Invoice	2/25/2019	553	2/25/2019	\$11,110.13	\$851.78	<input type="checkbox"/>	<input type="text"/>	Print

From there you can switch to paperless invoicing, change billing address and/or update the email address that your certificate is sent upon renewal. (Please allow 1 week for changes to take effect)

First name * Last name *

Email * Company name * Customer Number *

What changes would you like to make?

Receive email communication from Otis on product information and offers/discounts

Switch to paperless

Billing Address Change

Paperless Certificate of Insurance

Submit

OTIS