Payment Portal
Reference Guide

Otis Payment Portal

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Creating an Account

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Creating an Account

Step 2: To create an account, click on don't have an account
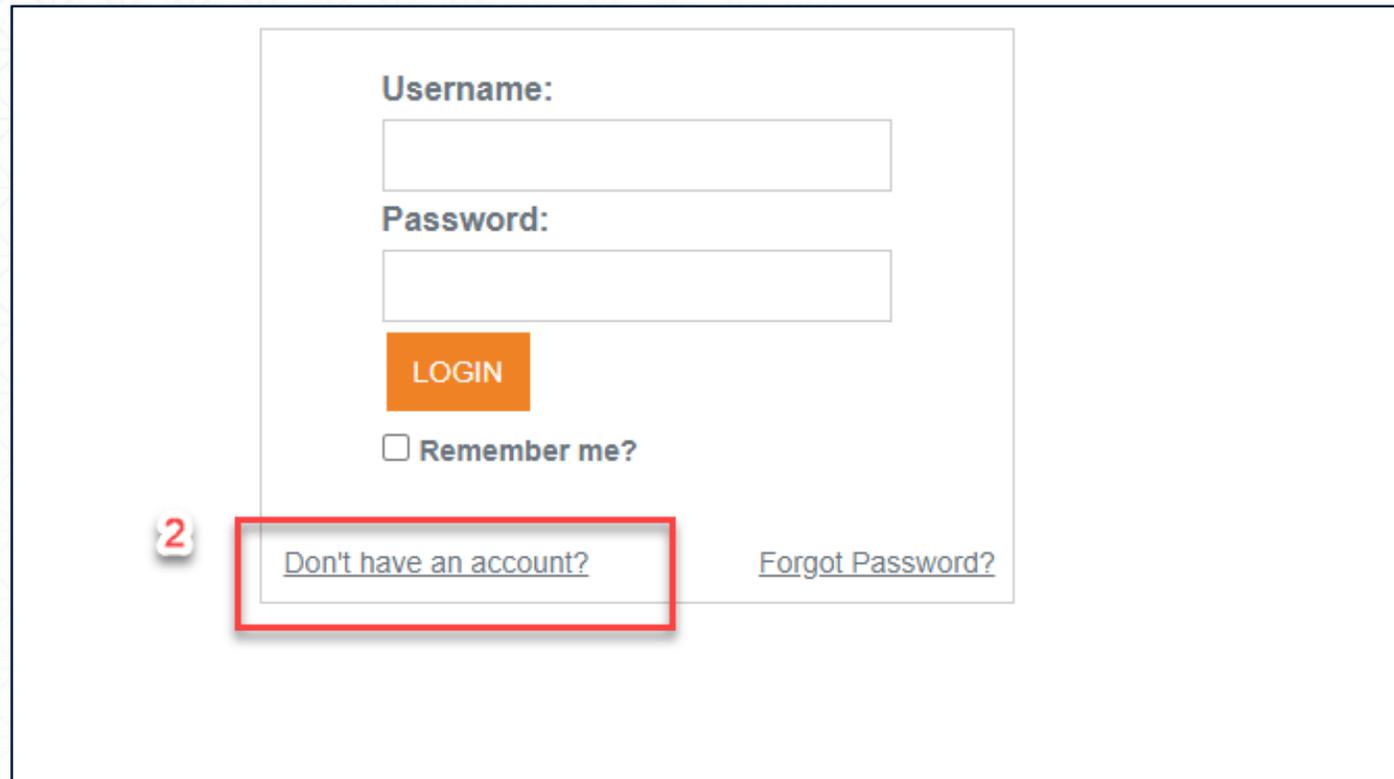
Sample of Invoice and where to find Customer Number, Invoice Number, and Zip Code . *Use the zip code on the payment coupon.

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

OTIS

5500 Village Blvd, Suite 102 West Palm Beach FL 33407

A

CUSTOMER NO.:	12345678
DATE:	6/15/2020
INVOICE NO.:	**B** 100400000005
TOTAL SERVICE CONTRACT AMOUNT:	$ 194.98

MAKE CHECK PAYABLE TO:

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

Otis Elevator Company
PO Box 13716
Newark NJ 07188-0716

100400012736 0000019498 5

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.

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.)

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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)

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
XXXXXXXXXXX1111	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.

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Adding additional customer numbers to your profile

Adding additional customer numbers to your profile

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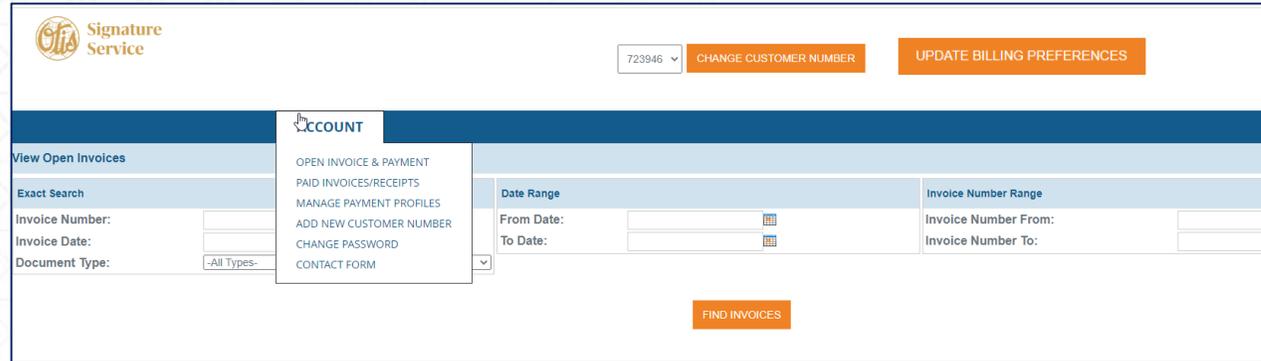
You will then be able to add additional accounts and toggle between them by clicking on the change customer number and selecting from the drop down.

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

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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.

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.

Recurring Payment Set Up (Credit Card or ACH)

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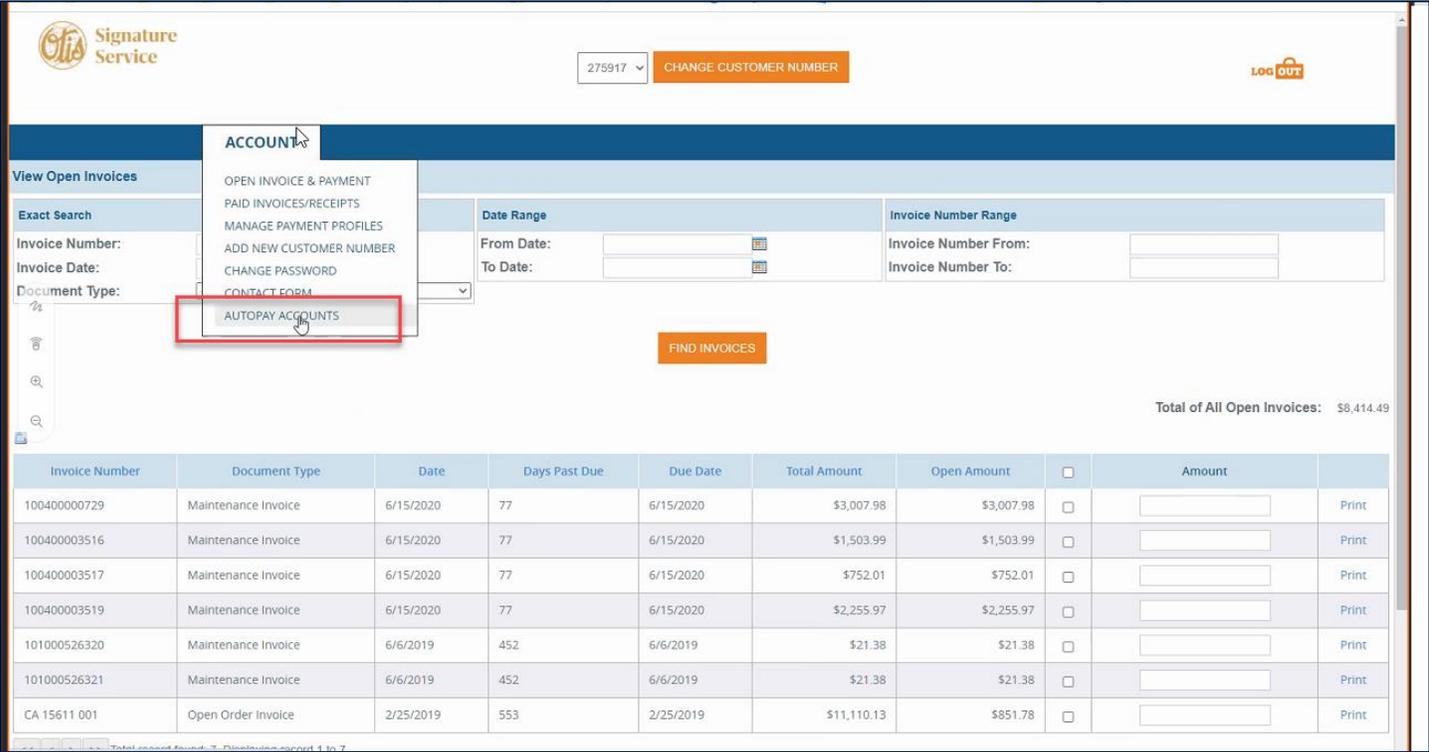
You will then see the next screen and click add new autopay account as shown below:

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

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

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.

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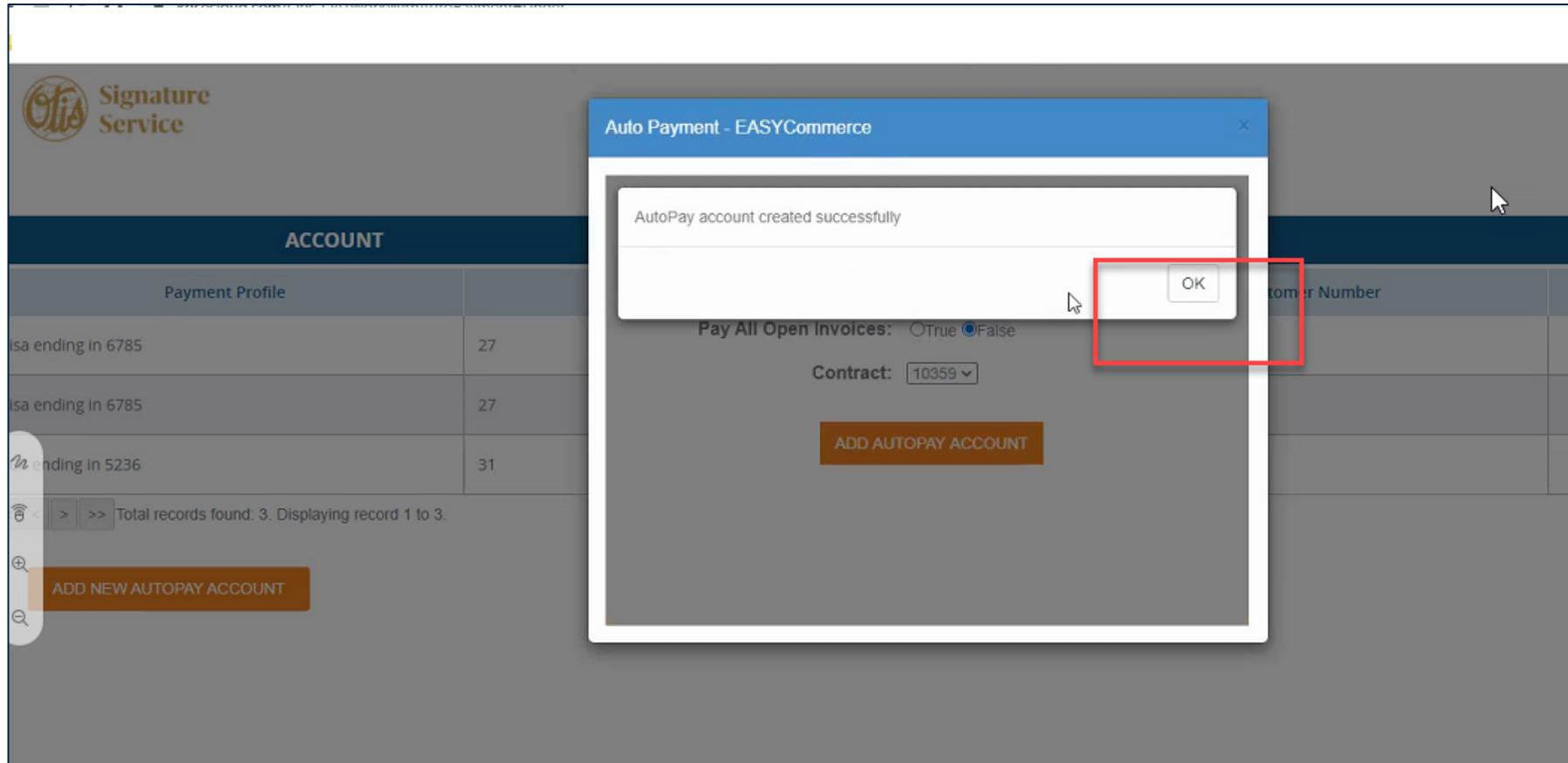
Updating Billing Preferences

Click on the orange button or from the drop down menu

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