



Store Manual

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Chapter 11: Online Payments/Pay-by-Text

New Customer Registration

Please visit this website to register and use Online Payments (OLP): {the client specific URL will be provided by High Touch}.

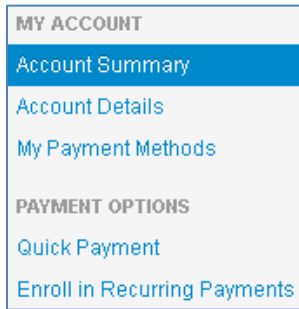
Click on the **Register** button on the *Account Login* screen. Fill out the required fields and click **Register** on the *Account Registration* page.

- Your *Username* can be anything, but keep in mind, no special characters are allowed, and the username must be between 4-10 characters. Usernames are not case sensitive.
- Your *Password* will need to be at least 8 characters long and must contain at least 1 capital letter, 1 lowercase letter, and 1 number. Special characters are allowed, but not required.
- Contact your store for your *Cust Account ID* if you do not know it. It is *required* to access your account.

The image displays two side-by-side screenshots of the High Touch Technologies website. The left screenshot is the 'Account Login' page, featuring the company logo, a sign-in form with fields for 'username' and 'password', a 'Sign in' button, a 'Reset Password' link, and a 'Register' button. The right screenshot is the 'Account Registration' page, which includes fields for 'Desired Username*', 'Email Address*', 'Cust Account ID*', 'Password*', and 'Repeat Password*', along with radio buttons for 'Preferred Language' (English and Spanish) and 'Cancel' and 'Register' buttons at the bottom.

After registration is complete, you will be returned to the *Account Login* screen. The first time you sign in, you will see the following prompt where you will need to verify your account and contact information.

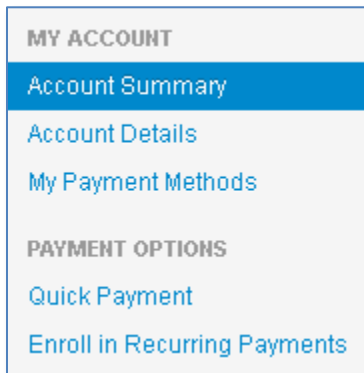
Please Note: In addition to your *Username*, you also have the option to log in with your *Email Address* or *Cust Account ID*.



You are now ready to start making online payments! You will see this menu on the left side of the screen once you log in, where you can choose to make a payment on your agreements, enroll in recurring payments, or add a stored credit card for ease of making future payments.

Customer How-To

Upon successful registration and login to the new Online Payments system, you will see this menu on the left side of the screen:



Account Summary: Allows you to take a payment on all agreements due

Account Details: Allows you to select which agreements you would like to pay

My Payment Methods: Allows you to manage and save Credit Card payment methods

Quick Payment: Allows you to make a quick two-step online payment

Enroll in Recurring Payments: Allows you to enroll in automated recurring payments

How to Make a Standard Quick Payment

The **Account Summary** screen is the first screen you will see when you log in. From this screen, simply click the **Pay All** button to pay on all active Agreements.

Receivables: \$0.00

Product	Agreement	Due Date	Amount Due
Miscellaneous Furniture	000004-000055563	05/14/20	\$36.61
Air Conditioner	000005-000054670	02/16/17 !	\$455.05
Full Size Dryer	000005-000054671	02/16/17 !	\$683.31

Enroll in Recurring Payments

With recurring payments your payments will automatically be processed on their due date.

[Sign Up](#)

Total Due: \$1,174.97

Actual amount due for all available agreements.

[More Options](#)

[Pay All](#)

You may also click the **More Options** button to go to the **Account Details** screen where you can select which Agreements to pay or not pay.

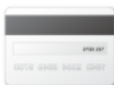
Please Note: You will not be able to uncheck past-due agreements, as payments are required on past-due agreements.

After you click the **Pay All** button, you will be taken to the **Quick Payment** screen. From here, you will enter your Credit Card or Bank Account information, or, if you have already created a payment method, you can select it from the left side of the screen. Click the **Next** button to proceed.

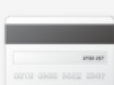
Please Note: Upon inputting your Credit Card or Bank Account information, you can click the checkbox next to **Save Payment Method** to save your Credit Card for later use.

CHOOSE PAYMENT METHOD

1111



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OR A NEW METHOD

How would you like to pay?

Credit Card

Save Payment Method



Card Number:*

Expiry Date:*

▼

▼

CVV: ?

Customer Information

First Name:*

Last Name:*

Make Payment

After clicking the Make Payment button, please do not close your browser, click the back button or click any links in the menu until the transaction has completed and the receipt is displayed!


→

Cancel

Next

The final **Please Confirm Your Payment** screen is where you will verify which agreements you are going to pay and with which payment method you will use. Once you verify, you will click the **Send Payment** button to submit your payment, and then you will need to accept the Terms and Conditions notice that appears on the screen.

Please Confirm Your Payment

BILLING INFORMATION
1111


PAYMENT INFORMATION

Agreement	Amt
000005-000054670 air conditioner	\$455.05
000005-000054671 full size dryer	\$683.31
Total Due:	\$1,138.36

Please click the Send Payment button only once and do not close your browser, click the back button or click any links in the menu until the transaction has completed and the receipt is displayed!

[If you came from [Online Payments How-To](#), return to [Login to View Rental Agreements and Make a Quick Payment](#) (step 4).]

Other Features

From the main **Account Summary** screen, you will be able to sign up for automated Recurring Payments by clicking on the **Sign Up** button under **Enroll in Recurring Payments**. You can also access this feature by clicking on the **Enroll in Recurring Payments** link from the menu on the left side of the screen.

You can also add or edit your payment methods by selecting **My Payment Methods** from the same menu or while you are actively making a payment.

Online Payments How-To

Register and Setup an Online Payments Account

- 1) Please visit **{the client specific URL will be provided by High Touch}** and click on the **Pay Online** link, and you will be directed to the new online payment registration page. You can also navigate directly to the *Account Login* screen by visiting **{the client specific URL will be provided by High Touch}**.
- 2) Click on the **Register** button on the *Account Login* screen. Fill out the required fields and click **Register** on the *Account Registration* page.
 - Your *Username* can be anything, but keep in mind, no special characters are allowed, and the username must be between 4-10 characters. Usernames are not case sensitive.
 - Your *Password* will need to be at least 8 characters long and must contain at least 1 capital letter, 1 lowercase letter, and 1 number. Special characters are allowed but not required.

The image contains two side-by-side screenshots of the High Touch Technologies online account management interface. The left screenshot is titled 'Account Login' and features the High Touch Technologies logo on the left. It includes a 'Sign in' button, a 'Reset Password' button, and a 'Register' button highlighted with a red box. Below the login fields, there is a section for 'New to Online Payments?' and a 'Contact Us' button. The right screenshot is titled 'Account Registration' and contains several input fields: 'Desired Username', 'Email Address', 'Cust Account ID', 'Password', and 'Repeat Password'. There are also radio buttons for 'Preferred Language' (English and Spanish) and 'Cancel' and 'Register' buttons at the bottom, with the 'Register' button highlighted in a red box.

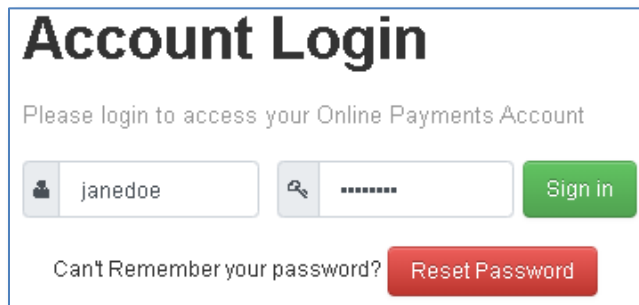
- 3) During the account registration process, you are required to input your **Email Address** and **Customer Account ID (H.O. Cust ID)**, as well as create a **Username**.
Please Note: The email address must match the email address on the customer's record in cynergi|suite, or registration will fail.
- 4) After registration is complete, you will be returned to the *Account Login* screen.
- 5) The first time you sign in, you will see the following prompt where you will need to verify your account and contact information.

The image shows a confirmation message box with a light gray background and a dark gray border. At the top, it says 'Thank you for registering!' in a large, bold, black font. Below this, in a smaller black font, it says 'In order to access your account we need to verify your information. Press continue to begin.' At the bottom center, there is a blue button with the word 'Continue' in white text.

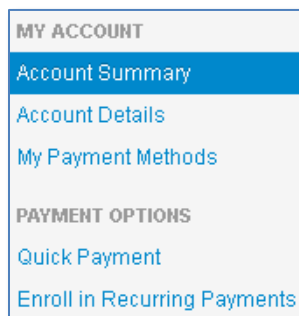
- 6) Once you log in and verify your address, phone, and email, you will have access to your online payments account.

Login to View Rental Agreements and Make a Quick Payment

- 1) At the *Account Login* screen, enter your **Username** and the **Password** you created while setting up your account. *Please Note: In addition to your Username, you also have the option to log in with your Email Address or Cust Account ID.*



- 2) Upon successful registration and login to the new Online Payments system, you will see this menu on the left side of the screen:




- **Account Summary:** This page allows you to take a payment on all agreements due.
 - **Account Details:** This page allows you to select which agreements you would like to pay.
 - **My Payment Methods:** This page allows you to manage and save Credit Card payment methods.
 - **Quick Payment:** This page allows you to make a quick two-step online payment.
 - **Enroll in Recurring Payments:** This page allows you to enroll in automated recurring payments.
- 3) Follow the steps on **How to Make a Standard Quick Payment** in the previous section, **Customer How-To**, then return to this section.
 - 4) A processing payment status bar will appear while the payment is processing. You will be brought back to the **Payment Receipt** screen and a receipt will be sent to your email address. You can go back to the *Account Summary* screen or **Sign Out** of the Online Payments system.

Payment Receipt

Jane Doe
1555 MAIN STREET
TRENTON, OH 54321

PAYMENT METHOD



PAYMENT DETAILS

PAYMENT DATE - 05/14/2020

Agreement	Amt
Payment to Store 000005	
000005-000054670 Receipt #00005467028068 air conditioner	\$455.05
000005-000054671 Receipt #00005467128068 full size dryer	\$683.31
Store Total:	\$1,138.36
Total Paid:	\$1,138.36

[Return to Account Summary Screen](#)

Select Which Rental Agreements to Make a Payment and Setup Recurring Payments

- From the **Account Summary** screen, click the **More Options** button under Total Due, or click **Account Details** from the Navigation Menu on the left side of the screen.

Total Due: \$106.55

Amount due for all active agreements

[More Options](#) Pay All

MY ACCOUNT

[Account Summary](#)

Account Details

- The **Account Details** screen will display all active Rental Agreements. Simply click the **Pay** button to pay on all active Agreements, or click the box in the **Pay** column to select the Agreements you want to pay.

Product	Agreement	Due Date	Payment Amount	Pay	Info	History
Miscellaneous Furniture	000004-000055563	05/21/20	\$ 36.61	<input checked="" type="checkbox"/>	i	☰
Air Conditioner	000005-000054670	02/16/17 !	\$ 455.05	<input checked="" type="checkbox"/>	i	☰
Full Size Dryer	000005-000054671	02/16/17 !	\$ 683.31	<input checked="" type="checkbox"/>	i	☰

Receivables: \$2,276.72 Credit

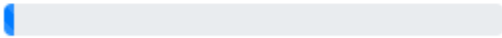
Payment Total: \$1,174.97

Make a payment on the 3 selected agreements Pay

- The **Account Details** screen also provides three interactive buttons:
 - Pay Checkbox:** Click the box in the **Pay** column to turn on or off which agreements you would like to pay, with some restrictions.

- **Past Due Agreements:** If your agreement is Past Due (has a red exclamation point), you will not be able to uncheck the box, since you have to pay on all Past Due Agreements.
 - **Agreements close to pay-off:** If an agreement is listed in green, then there is less than one full payment left to pay on it, and it is almost paid-out in full. You will not be able to select the box to pay-off this agreement online. You will need to visit the store to make the final payment. This is because proper ownership paperwork must be given to the customer in-person.
- **Info Icon:** Hovering your mouse over the icon in the **Info** column will provide you with additional information about the agreement, such as the store number, contract date, estimated early payout amount (EPO), current due date, agreement progress bar, and number of payments left.

Agreement Details

Description:	Miscellaneous
Furniture	
Store:	000004
Agreement Number:	000055563
Payment Mode:	WEEKLY
Contract Date:	05/14/2020
Current Balance:	\$1,530.00
Pay Off:	\$862.50
Current Due Date:	05/21/2020
Agreement Progress:	
	
Payments Left:	51
Please be aware that Pay Off amounts may or may not include receivable amounts, taxes, or fees.	

Please Note: The EPO amounts shown are pre-tax. Local sales tax will be applied during EPO.

- **History Icon:** Click on the icon in the **History** column to bring up a payment history screen displaying the last five payments made on the Agreement.
- 4) From both the **Account Summary** and **Account Details** screens, you will be able to sign up for automated Recurring Payments by clicking on the **Sign Up** button under **Enroll in Recurring Payments**. You can also access this feature by clicking on the **Enroll in Recurring Payments** link from the Navigation Menu on the left side of the screen.
 - 5) From the **Enroll in Recurring Payments** screen, you can click the box to enable which agreements you would like to set up with automated recurring payments. You may not enroll in recurring payments on a past-due agreement. You will then need to choose or add a payment method that you want to use for automated online payments. When finished, you will need to click the **Enroll** button to complete the enrollment process.


Product	Agreement	Due Date	Amount Due	Enrolled
Miscellaneous Furniture	000004-000055563	05/21/20	\$36.61	<input checked="" type="checkbox"/>
Air Conditioner	000005-000054670	02/16/17 	\$455.05	<input type="checkbox"/>
Full Size Dryer	000005-000054671	02/16/17 	\$683.31	<input type="checkbox"/>


NOTICE: THE LAST PAYMENT ON AN AGREEMENT MUST BE MADE AT A STORE.


Recurring Payment Method


CHOOSE PAYMENT METHOD

Select new payment type.

Choose One 

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Enroll

- 6) Upon clicking the **Enroll** button, you will be prompted to review the Terms and Conditions for Recurring Payments and click **Submit**. Upon successful enrollment, you will receive this message on the screen:

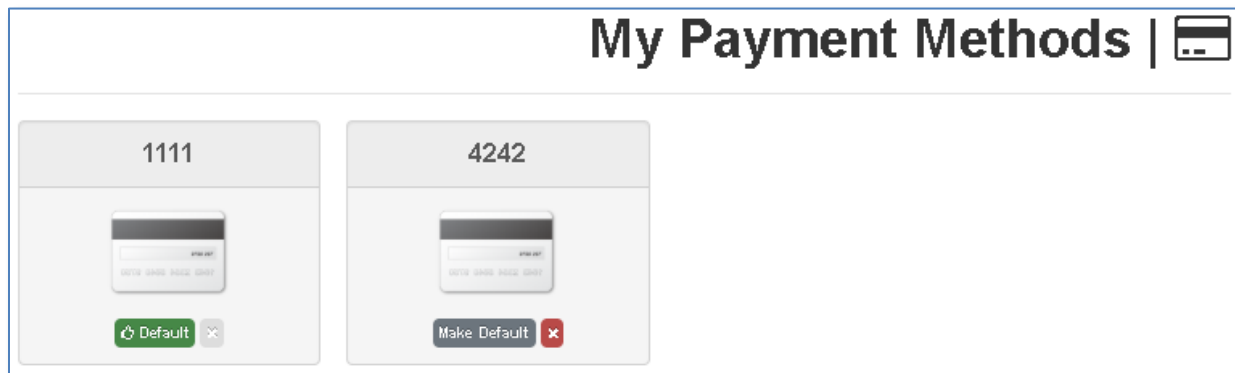
Enrollment Update Successful!

Congrats, your enrollment status with autopay has been successfully updated. Click the back button to return to the main screen.

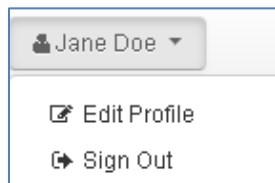
Back

Credit Card Methods, Edit Profile, and Signing Out of Online Payments

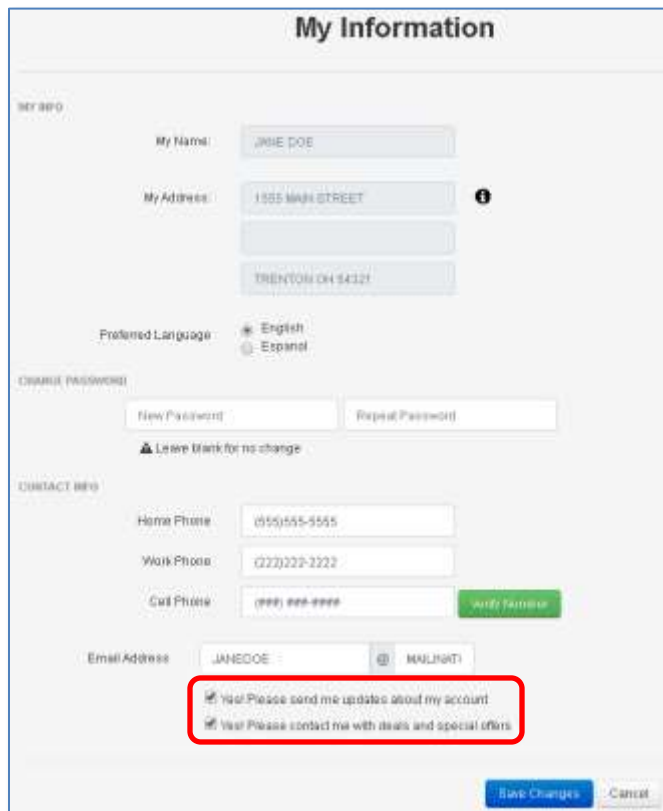
- 1) You can set a Credit Card as a default payment method, add, or delete a Credit Card from the **My Payments Methods** option from the Navigation Menu.



- 2) You can click your name at the top right corner of the screen to **Edit Profile** or **Sign Out**.



- 3) When you click **Edit Profile**, you will have access to specify your preferred language, change your password, and change your email address. Depending upon restrictions, you may have access to update your address and phone numbers. You can also select the **send me updates** checkbox to receive payment reminders or select the **deals and special offers** checkbox to opt into being contacted for special offers.



Please Note: Upon verifying your Cell Phone number, a PIN will be displayed. The PIN will be needed for **Pay-by-Phone** or **Pay-by-Text**. You can ignore if this option is not available.

Payment Modes

Customers can make different payment amounts, depending on which payment mode the company’s system uses: Standard, Multi, or Variable.

Standard Payments

In Standard Payments mode, customers must pay the next payment amount, which is pre-populated from cynergi|suite. They cannot change the number of payments or the amount of a payment. They *can* change which agreements they would like to pay in the **Pay** column.

Product	Agreement	Due Date	Payment Amount	Pay	Info	History
17x7 5x110+35mb	000004-000022437	06/06/20	\$ 30.31	<input checked="" type="checkbox"/>		
Receivables: \$0.00		Payment Total:		\$30.31		

Multi Payments

In Multi Payments mode, customers may choose whether they would like to pay only one payment or the current payment plus the next payment. The Current Due will automatically be checked, but customers may choose to select the Next Due as well.

Product	Agreement	Due Date	Payment Amount	Info	History
17x7 5x110+35mb	000004-000022437	Current Due: 06/06/2020 Next Due: 06/13/2020	<input checked="" type="checkbox"/> 30.31 <input type="checkbox"/> 30.31		
Receivables: \$0.00		Payment Total:		30.31	

Variable Payments

In Variable Payments mode, customers may change the dollar amount that they would like to pay. Besides regular payment amounts, Variable Payments mode may allow either overpayments only or overpayments and underpayments.

Overpayments Only

Customers may pay the minimum amount due or above. Any amount above will go into Receivables. If an amount is entered that is a multiple of the payment amount, only one payment will be applied, and the rest will go into Receivables.

Product	Agreement	Due Date	Payment Amount	Pay	Info	History
17x7 5x110+35mb	000004-000022437	06/06/20	\$ 40.00 Receivable: \$9.69 (Actual Due: \$30.31)	<input checked="" type="checkbox"/>		
Receivables: \$0.00			Payment Total: \$40.00			

Fully Variable

When the system is Fully Variable, underpayments are allowed in addition to overpayments. Any amount can be entered. Any amount under the expected minimum payment amount will apply only to Receivables and nothing will be applied to the agreement.

Product	Agreement	Due Date	Payment Amount	Pay	Info	History
17x7 5x110+35mb	000004-000022437	06/06/20	\$ 15.00 Receivable: \$15.00 (Actual Due: \$30.31)	<input checked="" type="checkbox"/>		
Receivables: \$0.00			Payment Total: \$15.00			

Online Payment Refunds

The cynergi|suite system has been enhanced so that refunds initiated for High Touch Online Payments (OLP) and recurring Pre-Approved Payments (PAP) can be done in a single step within cynergi|suite. This is done by using an API (Application Program Interface) to send the refund (credit) request to the payment processor, thus eliminating the need to process the refund in two separate systems.

Prior to this update, Online Payments and recurring Pre-Approved Payments did not write to the *Authorization File*. This meant that those transactions were not available on the *Authorization Inquiry* screen (**AUTHINQ**) or on the *Credit Card Reconciliation Report* (**CCRCNRP**). Furthermore, any refunds of OLP or recurring PAP payments previously had to be done in both the cynergi|suite system and in the payment processor system to credit the customer's credit card or bank account.

Please Note: This new functionality only applies to the High Touch version of Online Payments. Clients using the 3rd-Party Online Payments system will still need to perform refunds in both the cynergi|suite system and the payment processors systems.

The first change was updating the system so the High Touch OLP and recurring PAP payments would write to the *Authorization File*. This allows the ability to be able to select and see these types of payments on the *Authorization Inquiry* screen (**AUTHINQ**).

AUTHORIZATION INQUIRY

Location: Entry Type:

Receipt Number: Customer:

Payment Method: Payment Form:

Start Date: End Date:

***PLEASE SELECT 2 CRITERIA

* FIRST RESULTS GROUP *

Auth Date	Loc	Receipt Number	Customer	Receipt Amt	Auth Amt	Trans ID	Entry Type	Auth Nbr	Pmt Method	Pmt Form	Refund Ind
12/01/18	1	10603230	CAMPBELL, ██████████	3.25	30.74	132493	S	00132493	OLP	CC	N
12/01/18	1	10603231	CAMPBELL, ██████████	27.49	30.74	132493	S	00132493	OLP	CC	N
12/01/18	1	10603236	HAMILTON, ██████████	3.25	225.37	132499	S	00132499	OLP	CC	N
12/01/18	1	10603237	HAMILTON, ██████████	16.49	225.37	132499	S	00132499	OLP	CC	N
12/01/18	1	10603238	HAMILTON, ██████████	16.49	225.37	132499	S	00132499	OLP	CC	N
12/01/18	1	10603239	HAMILTON, ██████████	10.99	225.37	132499	S	00132499	OLP	CC	N
12/01/18	1	10603240	HAMILTON, ██████████	24.19	225.37	132499	S	00132499	OLP	CC	N
12/01/18	1	10603241	HAMILTON, ██████████	153.96	225.37	132499	S	00132499	OLP	CC	N
12/01/18	1	10603247	JACKSON, ██████████	13.00	78.96	132507	S	00132507	OLP	CC	N
12/01/18	1	10603248	JACKSON, ██████████	65.96	78.96	132507	S	00132507	OLP	CC	N

Showing 1 to 10 of 100 entries 1 2 3 4 5 Next Last

The changes also allowed the *Credit Card Reconciliation Report (CCRCORNP)* to be selected by OLP.

CREDIT CARD INTEGRATION RECON REPORT

Select by Loc or Loc Groups: No

Location Selection: 1-Select by 10 Locs/Groups

Starting Loc Group: [] Ending Loc Group: 0

Payment Method: [] Payment Form: []

Starting Date: 12/06/18

Include Chargebacks on Report: []

1 = ICC Only (Integrated Credit Card)
 2 = PAP Only (In Store Pre-Approved Payments)
 3 = OLP Only (On-Line Payments includes Recurring PAP)
 4 = PAP & OLP Only

PRINT MAIN MENU

The main new functionality is to allow true refunds of High Touch Online Payments (OLP) and recurring Pre-Approved Payment (PAP) payments where the funds are credited back to the customer’s credit card or bank account through the refund API. This was initially only available with the Pre-Approved Payments feature. To begin, perform a refund as normal from the history screen for a High Touch Online Payment by clicking on the **Refund** icon.

Pay	Due	Next Due	Dys Lte	Dys Pd	Rcpt	Amt	Tax	Other	Tot Pay	Bal	Assoc	Pmt Form
12/05/18	11/28/18	12/12/18	7	14	10603917	30.76	0.00	8.08	38.84	281.23	ONLINE PAYMEN	Credit
11/27/18	10/20/18	11/28/18	38	39	10602646	0.00	0.00	0.00	0.00	311.99	HUNTER	Cash
10/04/18	10/06/18	10/20/18	2	14	10595028	30.76	0.00	3.08	33.84	311.99	WELLS	Credit

Because the system requires that the refund amount be equal to the original payment amount, you must be sure click **YES** to refund the entire transaction.

ATTENTION!

Do you want to refund the ENTIRE transaction?
 CLICK "NO" to refund just this receipt

YES NO

Please Use Caution: Recurring payments are processed for each agreement separately.

- Because of this, if there are multiple agreements paid through recurring payments, each agreement will need to be refunded individually.
- Nevertheless, **the user should always click YES** for refunding the entire transaction.
- This will allow the system to bundle the refund the same exact way the original payment was made.

Once the payment to be refunded is selected and the user returns to the payment screen, click the **TENDER** button.

AGREEMENTS													
Terms	# of Payments	▲ Agreemnt	Balance	Pmts Left	Curr Due	Next Due	<input type="checkbox"/> Dt /Amt	<input type="checkbox"/> Ext Amt	Pmt Amt	Late Fees	Misc Fees	Tax	Total Due
B	<input type="text"/> x 6.50	Club Fee	44.57		12/15/18	12/15/18	<input type="checkbox"/>	<input type="checkbox"/>	6.50	<input type="text"/>	0.00	0.00	
B	<input type="text"/> x 30.76-	LEAHLYN	281.23	10	12/12/18	11/28/18	<input type="checkbox"/>	<input type="checkbox"/>	-30.76	5.00-	-3.08	0.00	38.84-

Length 52 Terms: B RTO

Total Charge: 38.84- Receivable: 0.00 Due: 38.84-

When the *Total Payment Due* box appears, leave the *Amt Received* box blank and the *Payment Type* how it defaulted (i.e., either 4-Credit Card or 12-ACH/PAP), and click on the **PROCESS PAYMENT** button.

TOTAL PAYMENT DUE

Total Due: -38.84 Amt Received: Payment Type: 4 - Credit Card

Change: 0.00

Please Note: Clicking on the **CHARGEBACK** button will reverse the payment in cynergi|suite, but will NOT send a request to the payment processor to credit the customer's account.

After clicking the **PROCESS PAYMENT** button, continue by clicking the **CONFIRM** button.

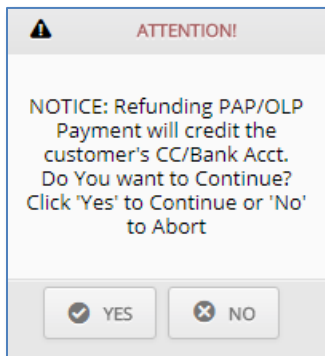
TOTAL PAYMENT DUE

Total Due: -38.84 Amt Received: Payment Type: 4 - Credit Card

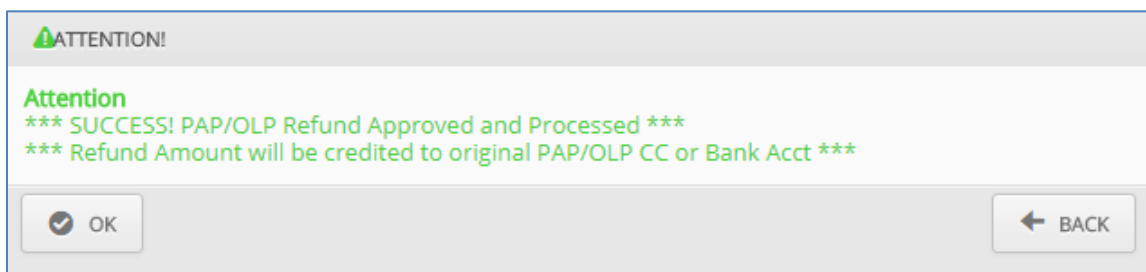
Change: 38.84

For refunds of High Touch OLP or PAP payments, a new *Attention* box will appear notifying the user that the customer’s credit card or bank account will be credited.

- Clicking the **YES** button will allow the refund process to continue.
- Clicking the **NO** button will provide the ability to abort the refund process.



Upon clicking the **YES** button, the transaction will attempt to send a refund request to the payment processor. The below message should appear upon a successful attempt to refund the payment. If there is an error in processing the refund with the payment processor, then an error message will be displayed.



The Online Payment and recurring Pre-Approved Payment refund transactions will also show on the *Authorization Inquiry Screen (AUTHINQ)* in red with a Refund Indicator of “Y”:

*** LAST RESULTS GROUP ***												
Auth Date	Loc	Receipt Number	Customer	Receipt Amt	Auth Amt	Trans ID	Entry Type	Auth Nbr	Pmt Method	Pmt Form	Refund Ind	
12/06/18	1	10604020	WOODS, ██████	45.09	114.32	133392	S	00133392	ICC	CC	N	
12/06/18	1	10604021	WOODS, ██████	43.99	114.32	133392	S	00133392	ICC	CC	N	
12/06/18	1	10604022	SMITH, ██████	38.84-	38.84-	273930	S	REFUND	OLP	CC	Y	

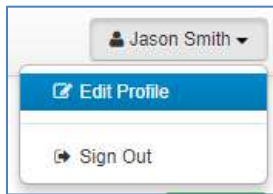
Showing 11 to 13 of 13 entries. First Previous 1 2

Pay-by-Text How-To

Your company-specific Pay-by-Text phone number will be provided by High Touch. To activate the ability to perform balance inquiries or pay your account via text message, verify your cell phone number *and* add a default credit card to make payments. First log into the online payment site: **{the client specific URL will be provided by High Touch}**.

Verify Cell Phone

Click on the drop-down arrow next to your name in the upper right-hand corner of the main page and click **Edit Profile**.



Update the **Cell Phone** field with your current cell phone number (including area code) if not already populated.

Cell Phone	(###) ###-####	Verify Number
------------	----------------	---------------

Click on the **Verify Number** option after the Cell Phone field is populated with your number. Within a minute, you will receive a text containing a 4-digit Validation Code. Enter that code into the **Validation Code** field and click **Validate**.

Home Phone	(316)555-8272	
Work Phone	(316)555-7238	
Cell Phone	(316)555-1023	Verify Number

Home Phone	(316)555-8272	
Work Phone	(316)555-7238	
Cell Phone	(316)555-1023	
Validation Code:	2357	Validate

Home Phone	(316)555-8272	
Work Phone	(316)555-7238	
Cell Phone	(316)555-1023	Verified
	<input type="checkbox"/> I prefer SMS Communication	
	Verify Number	
Phone pin:	4833	

The screen will update and a **Phone PIN** field will appear with a new **4-digit PIN**. This will be your own PIN to be used when making a payment by text or performing a balance inquiry via text.

The last step is to save changes to your profile. After you have verified your phone number and before you exit your profile screen, click on the green **SAVE CHANGES** button at the bottom of the profile screen. You will then be returned to the **Account Summary** screen.

SAVE CHANGES	CANCEL
--------------	--------

Add Default Credit Card

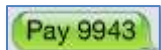
Click on **My Payment Methods** on the left side menu. Here you will be able to add a credit card to be used as the default payment method when making a payment online, over the phone, or by text. Click **Save Card** after the card information is entered. This card will automatically be marked as *Default* if it is the only card entered.

You are now ready to start using your cell phone to manage your account!

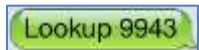
Texting Option

Reply to the same phone number you received your PIN from with one of the following options:

- **To make a payment:** Reply **Pay** followed by your assigned PIN. You will then receive a return text that will confirm your payment has been processed.



- **For a balance inquiry:** Reply **Lookup** followed by your own PIN. You will then receive a return text that will give you the current amount you owe on all of your accounts.



- More keyword options are available in the **Two-Way Text Messaging** section of **Chapter 10: Texting Feature**.

Please Note: The above pictures are example only—you would replace the “9943” with your own PIN.

Phone Option

Calling the same phone number you use for texting will also allow you to check your account balance and make a payment. You will be prompted to enter your PIN when the automated system answers. You will then receive your current account balance. Press **1** to pay the current balance with the default credit card you set up earlier.

Online Payments Administration

Online Payment Login and Support Information

Online Payment Server Address (URL)

The URL for your new online payment server will be specific to *your* company. The exact URL you and your customers will use will be provided to you by a High Touch Solutions Specialist before the online payments launch day. *High Touch can also provide a customer flyer which can be used to assist your customers with registration to the new online payment site—contact your Account Manager for more information on this option.*

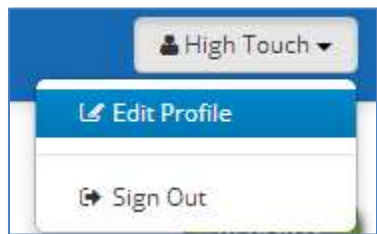
Administrator Login Account

The primary Administrator account that will be used to manage the site will also be provided to you by a High Touch Solutions Specialist. With this account, you will be able to manage users in the system, generate online payment reports, manage the advertising logo, as well as basic troubleshooting.

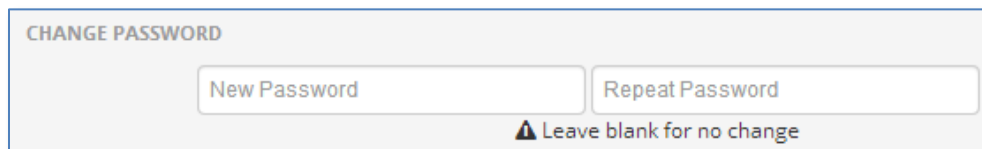
After initial login with the new Admin account you will want to change the initial generic password you are given.

Updating Your Password

- After logging into the site, click the drop-down arrow next to your name in the upper right corner and click **Edit Profile**.



- Simply enter a new password in the *Change Password* fields and click **Save Changes** in the lower right corner.

A screenshot of a 'CHANGE PASSWORD' form. It has two input fields: 'New Password' and 'Repeat Password'. Below the fields, there is a warning icon and the text 'Leave blank for no change'.

Please Note: The Password must be at least eight characters long and must contain at least one capital letter, one lowercase letter, and one number. Special characters are allowed, but not required.

Online Payments Support and Contact Info

Online Payments Support is available 24/7 by calling 1-855-CYNERGI (296-3744) or during normal business hours by emailing support@hightouchinc.com.

Admin Menu Options

Manage Users

Manage Users					
Search: <input type="text"/>					Add New User
User ID	HO Cust ID	Username	Full Name	Phone	Email
1		htadmin	HT Admin		change@me.com
5		cstech	Client Support	8552963744	support@hightoucinc.com
10		wriadmin	WRI Admin		info@werentit.com
101	010502450	██████████	██████████	3165550001	██████████
102	010800937	██████████	██████████	3165559013	██████████
103	010801084	██████████	██████████	3165555716	██████████

- **Add New User:** This option will be primarily used to add site administrators. *It can be used to add customer accounts as well, should the need arise, but typically customers will register on their own.*

Add New User

USER INFO

Username

Site Administrator

Password

Repeat Password

Name

HO Cust ID

Address

CONTACT INFO

Home Phone

Work Phone

Cell Phone

Email Address @

Customer receives account updates

Customer receives deals and special offers

[Add User](#)

- 1) The only required fields to populate when adding a site administrator are *Username, Password, Email Address*, and you must also check the **Site Administrator** box. It is recommended to fill in the *Name* fields as well, although it is not required.
- 2) You may leave the *HO Cust ID* field **blank** when adding a site administrator, as there is no customer rental account to associate with this user.

Edit User: To edit a customer user account, click on the user's name and it will pull up the user info screen where changes can be made. After changes are made, click **Save Changes**, or **Cancel** to exit without saving.

Edit User: SMITHJASON

USER INFO

Name: SMITH MI JASON

HO Cust ID: 01201234

Address: 1234 COZY DR
Address 2:
WICHITA KS 67202

CONTACT INFO

Home Phone: (316)555-9263

Work Phone: (316)555-1471

Cell Phone: (316)555-4346

Email Address: JASONS @ HIGHOTUCHINC.COM

Customer receives account updates

Customer receives deals and special offers

Save Changes Cancel

- **Delete User:** Please contact High Touch Support at 1-800-959-HELP (4357) to have a user removed from the system.

Dashboard

The dashboard is an interactive feature that will show different breakdowns of online payment revenue. In addition, it also has information on peak days/hours as well as a snapshot of new user registrations.

- **Section 1: Online Payment Graph**

This is an interactive graph showing successful and declined payment amounts. The data can be viewed by *Hourly* or *Daily* increments which can be selected using the buttons in the upper right corner of the graph. The default view is for **All Stores**, but the drop-down box can be used to filter for a specific store.

There are two ways to interact with the graph. Hovering the mouse over a particular point on a line (see picture below) will show the actual data for that particular day or hour depending on which view is being used. To zoom in, left click and drag the mouse to the date/time range you wish to enlarge. Click **Reset zoom** to reset to the default view.



- **Section 2: Breakdown of Top Stores, Peak Days/Hours, and Payment Status %**

Here the top stores for online payment revenue, peak days/hours, and a breakdown of successful payments vs. declined payments can be viewed. Clicking the **View** option will bring up a bar chart with the same information.



- **Section 3: New User Registrations**

This section simply shows a line chart showing new user registrations per day. Like the Online Payment Graph, the mouse can be used to zoom in on this chart if needed.



Reports

There are currently two types of reports available:

- **Online Payments Received Report**

This report will show summary and detailed online payment information for a selected date range. By default, it will show all stores on the report, but you can filter for a specific store. To see all customers, leave the *HO Cust ID* field blank or populate it if payment history for one particular customer is needed.

Please Note: Dates must be in YYYY/MM/DD format, or the report will not generate.

Example Payment Summary Report

Date	# of Payments	Successful Amounts	Declined Amounts	# Posted	# Declined
2013-02-12	2	\$151.34	\$0.00	2	0
2013-02-14	1	\$3.24	\$0.00	1	0
2013-02-15	7	\$190.88	\$0.00	7	0
2013-02-19	12	\$1,004.74	\$0.00	12	0
2013-02-20	5	\$227.36	\$0.00	5	0
2013-02-22	4	\$98.54	\$0.00	4	0
Totals	31	\$1,776.72	\$0.00	31	0

Example Payment Detailed Report

Store	Invoice #	Payment Date/Time	Receipt#	HO Cust ID	RA#	Pmt Amt	Status	Auth#	TRANSACTION ID
00002	10027	2013-02-12 14:12:04	E019	HN0020004598	00207262	\$43.04	Success	TAS245	22397753
00002	10026	2013-02-12 12:18:25	E003	HN0020004598	00207262	\$148.90	Success	TAS740	22391125
00002	10029	2013-02-15 10:45:39	E047	HN0020004598	00207262	\$43.04	Success	TAS377	22600280
00002	10029	2013-02-15 10:35:49		HN0020003000		\$118.95	Success	TAS356	22805751
00002	10040	2013-02-19 10:46:43		HN0020000722		\$71.90	Success	TAS740	22805153
00002	10041	2013-02-19 11:46:14	E107	HN0020000722	00207263	\$55.66	Success	TAS319	22900873
00002	10042	2013-02-19 11:48:36	E188	HN0020000722	00207263	\$55.66	Success	TAS372	22808958
00002	10043	2013-02-19 11:51:55	E191	HN0020000722	00207263	\$55.66	Success	TAS448	22809085
00002	10045	2013-02-19 13:53:26	E195	HN0020000722	00207263	\$55.66	Success	TAS222	22814706

Report Parameters

Dates must be in YYYY/MM/DD format:

Start Date:

End Date:

HO Cust ID: (optional)

Store: (optional)

Select Report Type

Summary Report

Both Summary and Detail

Detail Report

Store Summary

Show Payments

All

Made

Declined

- **User Activity Report** – This report has three options available:

- 1) **Registered Users:** This report will show all registered users along with their email address, HO Cust ID, and date of registration.
- 2) **All Activity (Non-Admin):** This report will show login attempts, registration, and profile updates for all non-admin users (customers).
- 3) **All Activity (Admin):** This report will show login attempts, registration, and profile updates for all admin users.

Marketing

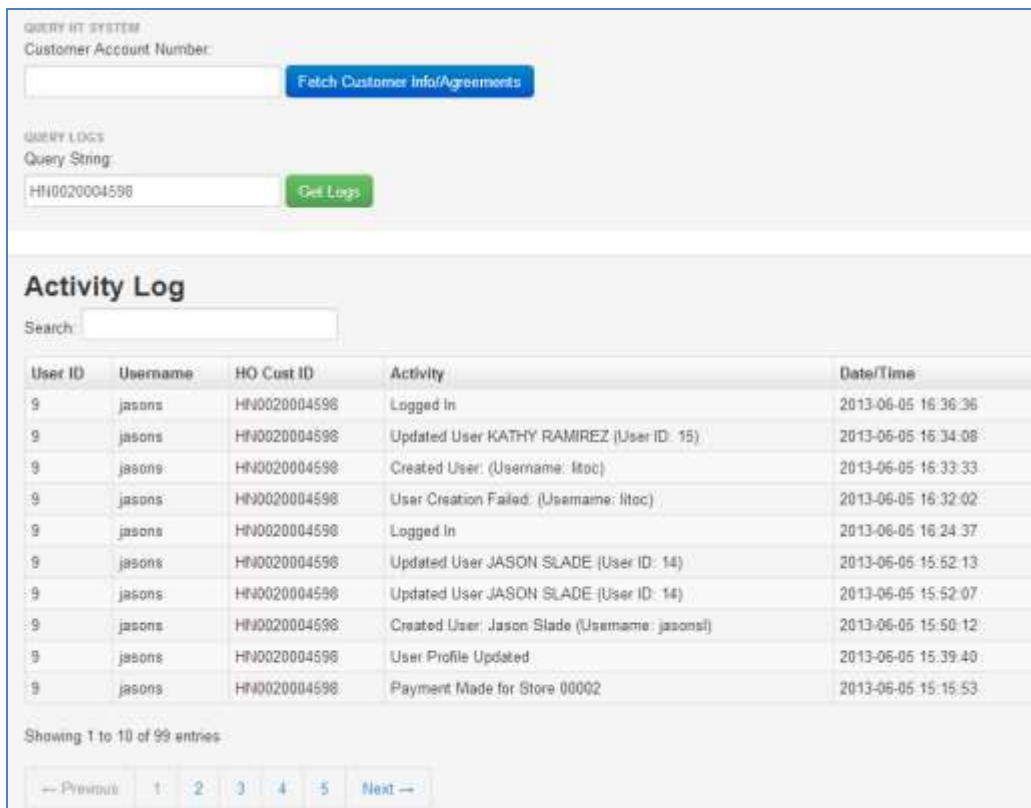
The marketing option is where the site advertising banner can be set up. The *Banner Link* is the URL that will be loaded once the user clicks on it. For example, this would typically be your company website. The *Upload New Banner* option is used to upload a new JPEG picture that will display as the advertising banner (the banner shown below is an example).



Troubleshooting

The troubleshooting page can be used to look up additional information for a particular customer’s account. To see a list of agreements for a particular customer, enter the **Customer Account #** into the *Customer Account Number* field and click on the **Fetch Customer Info/Agreements** button.

Agreement information and additional logging can be searched for by using the *Query Logs* section. To search using this method, enter the customer’s **HO Cust ID** or **Last Name** into the *Query String* field and click on **Get Logs**. An example is shown below.



Performing a “Test” Online Payment

This section explains the steps to file a “test” online payment into the cynergi|suite system. This process is typically used during initial activation of the site to ensure payments are filing successfully.

- Start by creating a temporary test customer and rental agreement in the cynergi|suite system. You will use this test customer and agreement to file a test payment in the online payment site. Another option is instead of creating a test customer is to use an existing store employee if he or she is currently has an active rental from the store. In this case, they can register on the online payment site and make a normal payment toward their active rental agreement for testing purposes.
- Look up the **Customer Account#** for the test customer or employee that will be used for the online payment test. This can be found under Customer Maintenance in cynergi|suite (*To locate a customer, go to Home Menu – Customer Maintenance – Add/Change Customer Info and Search by customer name*). The **Customer Account#** can be found on the left-hand side as shown in the example below:

** ONLY GROUP FOR YOUR PARAMETERS **							
Store	Account	Last Name	▲	First Name	Address	City	License
	1	TEST		TEST	1		

Showing 1 to 1 of 1 entries

ADD CUSTOMER PREVIOUS 100 NEXT 100

- Navigate to the Online Payment Site and register the new user using the **Customer Account#** of the test customer or employee who will be testing the online payment.

Please Note: When registering, the username chosen must be between 4-10 characters. The Password must be at least 8 characters long and must contain at least 1 capital letter, 1 lowercase letter, and 1 number.

Once successfully registered, click either the **View/Pay My Agreements** or **Quick Payment** link on the left-hand side, which brings up the list of agreement(s) along with the Payment options.

After submitting the online payment, simply log back into the cynergi|suite system and check the test customer’s account to verify the payment filed in the point-of-sale system. The Web payment may then be refunded if necessary.