

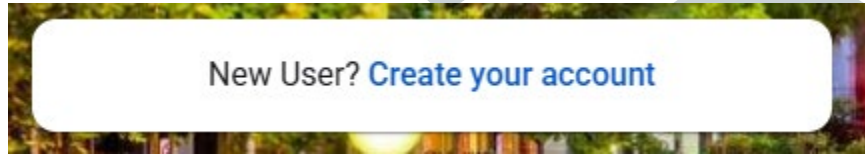
## Community Connect – Utility Portal

### Customer View vs Admin View

Customer View	Admin View
Register/login from home page - _____ourcommunityconnect.com	Log in using user created in miviewpoint – email/password at _____ourcommunityconnect.com
Welcome Page with Where To? Tiles based on modules in use	Welcome Page with Where To? Tiles based on modules in use
Link utility account using Customer Number and Last Name or Last Billed Amount	Link utility account to Admin user using Customer Number and Last Name/Last Billed Amount
Home – View Last Bill, Enroll in Paperless, Manage AutoPay, Link Another Account	If you link a utility account: Home, Bills and Payments, Graphs, Communications, Manage AutoPay
Bills and Payments – view bills (if Splitter/Email Bills has been processed for previous bills), click on Amount to see breakdown of transactions	Admin menu: Overall view of portal, List of emails sent from portal, schedule payment reminder/late payment emails, send mass emails to all portal users, bank rec.
Graphs – View usage graphs and billing totals year over year (if history in Caselle)	Utility Admin menu: set up portal auto email, block customers from using ACH or CC, update Splitter/Email Bill body of email, link portal email to a landlord/cosigner, view list of all utility accounts linked to portal email, schedule autopay, view list of all customers enrolled in autopay and help customers enroll or unenroll in autopay, post newsletter or other communication for utility customers
Communications – a place to view/print any communication from the City/Office	
Manage Auto Pay – enroll or unenroll from AutoPay (must unenroll in autopay and reenroll to change payment type used)	

## Customer View – Login/Register for Portal

1. Navigate to \_\_\_\_\_.ourcommunityconnect.com
2. To login – use previously created account email/password
3. To Register the first time
  - a. Click Create your account



- b. Enter Email address, create password, enter password again
    - i. Make sure password follows all criteria
    - ii. Enter phone number if text messages are preferred for communication
    - iii. Click Register
    - iv. TIP: Can register using Apple or Google accounts if preferred

### Setup a new account

A screenshot of a web registration form titled "1 Register". The form includes fields for "Email\*" (containing "mhornby@caselle.com"), "Password", and "Confirm Password\*", each with a toggle icon. Below these fields are six green checkmark icons indicating password requirements: "Password must be at least 8 characters", "Password must have an uppercase character", "Password must have a lowercase character", "Password must have a number", "Password must have one of the following symbols \$\*.!@#%&/'\><:;|\_~", and "Passwords must match". There is a "Phone Number" field and an "Opt In to Text Message Alerts" checkbox. A note states "\*\*Messaging and data rates may apply\*\*". A green checkmark icon and the word "Success!" are displayed, along with a "CLOUDFLARE" logo and links for "Privacy" and "Terms". A large blue "Register" button is at the bottom, followed by the text "Or continue with" and icons for Google and Apple.

c. Verify Email

**2** Verify Email

We've sent a verification code to your e-mail, please enter it below

Code

Verify

Resend code (25 seconds)

d. Link Utility Account or Continue to the Homepage and link account later

☒ Register

☒ Verify Email

**3** Link Utility Customer

Customer Number\*

Last Name or Last Bill Amount

Verify Go to homepage

☒ Register

☒ Verify Email

**3** Link Utility Customer

Customer Number\*

100073008

Last Name or Last Bill Amount

Da Vinci

Verify Go to homepage

- i. Customer numbers can have dashes or periods, but do not require them to find the customer account
  - ii. Last Name is not case sensitive, but **MUST** match the last name that Caselle lists for the account
- e. Setup Autopay (for Utility Customers only) or Continue to Homepage
  - i. Days Prior to Due Date
    - 1. Due Dates can change period to period, so this allows the payment date to reflect based on the due date of the current period rather than a calendar day
  - ii. Would you like to establish a maximum payment amount for autopay?
  - iii. **NOTE:** If your bill is currently due a payment will automatically be taken on today's date to pay off that balance
    - 1. **THIS INCLUDES ENTIRE BALANCE DUE TAKEN IMMEDIATELY**
  - iv. Click Next

Register

Verify Email

Link Utility Customer

4 Setup Autopay

You can setup autopay below or setup later and just proceed to the homepage

[Go to homepage](#)

1 Schedule ————— 2 Payment Method

**Select the number of days prior to due date**


Days prior to due date\*


☐ Would you like to establish a maximum payment amount for autopay?

**Note:** If your bill is currently due a payment will automatically be taken on today's date to pay off that balance.

[Next](#)

- i. Enter Payment Details
- ii. Click Schedule auto pay

 Success!


[Privacy](#) • [Terms](#)

☐ Checking Account


☐ Savings Account

Schedule auto pay

**SUCCESS! Customer is registered and logged in!**

 City of Civic Systems

Departments ▾

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Welcome to the Community Portal

**Where to?**

Utility Bill

Da Vinci, Leonardo

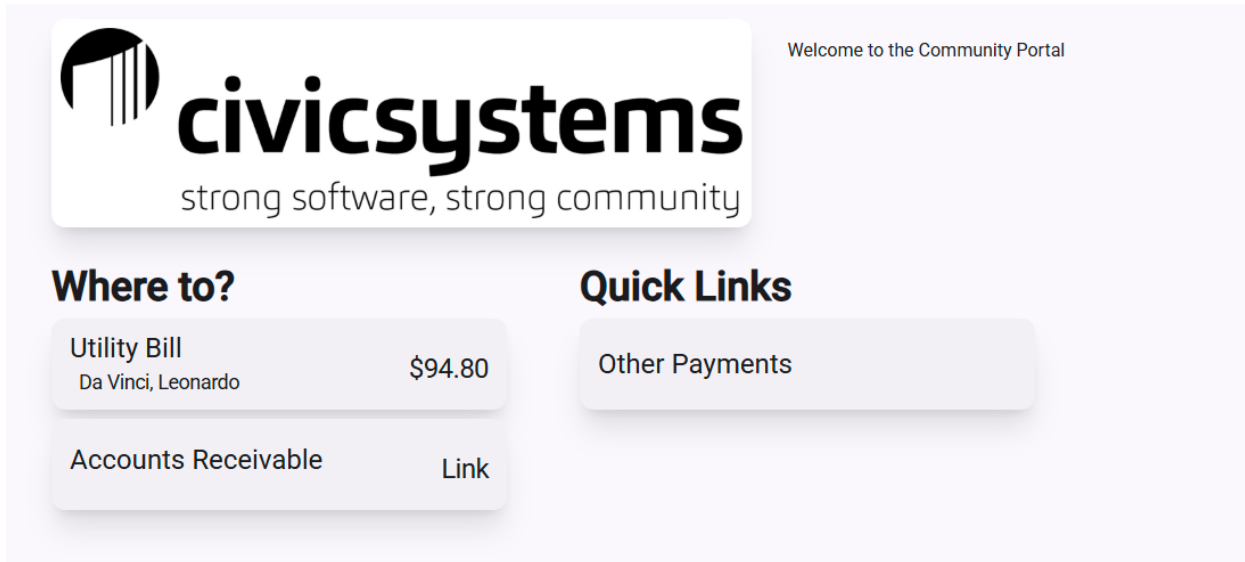
\$94.80

## Customer View – Homepage

Homepage can include many different “tiles” based on other modules that you may have (such as Accounts Receivable, Animal License, Building Permits, Business Licenses, Business Tax, Custom Modules, or Miscellaneous Payments)

Customers can click on previously linked accounts or link additional modules as needed.

The Welcome message at the top has the ability to be changed at your discretion.



The screenshot displays the Civicsystems Customer View Homepage. At the top left is the Civicsystems logo, which includes a stylized mountain icon and the text "civicsystems" in a bold, sans-serif font, with the tagline "strong software, strong community" underneath. To the right of the logo, a welcome message reads "Welcome to the Community Portal". Below the logo, there are two main sections: "Where to?" and "Quick Links". The "Where to?" section contains two tiles: one for "Utility Bill" showing a balance of "\$94.80" for "Da Vinci, Leonardo", and another for "Accounts Receivable" with a "Link" button. The "Quick Links" section contains a single tile for "Other Payments".

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strong software, strong community

Welcome to the Community Portal

### Where to?

Utility Bill	\$94.80
Da Vinci, Leonardo	

### Quick Links

Other Payments
----------------

Accounts Receivable	Link
---------------------	------

## Customer View – Utility Billing

### Utility Billing Home Page

The screenshot displays the 'City of Civic Systems' utility billing portal. The header includes the logo, 'City of Civic Systems', a 'Departments' dropdown, and a user profile 'mariahornby@hotmail.com'. The left sidebar lists navigation options: Home, Bills and Payments, Graphs, Communications, and Manage Auto Pay. The main content area is divided into two columns. The left column, titled 'Account Summary', shows the address '423 ANN ST', account number '1-000730-08', and a total amount due of '\$94.80' with a due date of '03/31/2025'. It includes a 'Make Payment' button and a 'View my bill' link. The right column, titled 'Customer Info', lists the customer's name 'Da Vinci, Leonardo', email 'mariahornby@hotmail.com', service address '423 ANN ST, Any City, IA 51455', and mailing address '69 Connection Way, Civic Systems, IA 59999'. It also features buttons for 'Enroll in Paperless', 'Manage Auto Pay', 'Manage Wallet', 'Link Another Account', and 'Unlink Account'.

1. Basic Customer Information – CANNOT be changed in the portal. If customer needs something like the mailing address changed, they must contact the office to do so in Caselle.
2. Balance Due – Current balance due as of the latest due date. This will update in real time from Caselle including any payments, adjustments, and other services marked “include in balance due” which typically includes penalties, reconnect fees, NSF fees, etc.
  - a. The new bill amount will ONLY update AFTER closing the billing period.
3. Make a Payment
  - a. Enter Payment Details for Service Fee charges to calculate and show Total Payment
  - b. If Shopping Cart is enabled, customers can pay for multiple accounts with one transaction

### Make a Payment

The 'Make a Payment' form is displayed. At the top, the 'Payment Amount' is set to '94.80'. Below this, there is a section titled 'Select a payment method' with three radio button options: 'Credit Card', 'Checking Account', and 'Savings Account'. To the right of these options is a 'Payment summary' table. The table has two columns: the first column lists the items (Amount, Service Fee, Total) and the second column shows the values (\$94.80, Enter details, Enter details). Below the table, there are two buttons: 'Pay now' and 'Add to cart'.

Payment summary	
Amount	\$94.80
Service Fee	Enter details
Total	Enter details

4. View my bill – will show latest utility bill pdf when processed by Splitter/Email Bills
  - a. Only becomes available after the current billing period is closed
5. Enroll in Paperless – when clicked, sends to Caselle a message to uncheck the Send Paper Statement field on the customer account

Caselle Connect® > Utility Management > Customer Inquiry

Caselle Connect® Customer Inquiry

Customer:

1-000730-08 Da Vinci, Leonardo  
[423 ANN ST](#)  
 1000730

Display Compare History Transactions Customer Services Location

Customer 1 Customer 2 Equal Pay Alternate Mailing Additional Fields

Subject to taxes: Yes  
 Subject to tax certification: Yes  
 Send utility bill: Yes  
 Send paper statement: No  
 Send delinquent notice: Yes  
 Send shutoff notice: Yes  
 Send backflow survey: Yes  
 Last backflow survey sent:  
 Landlord: No  
 Landlord disconnect date:  
 Approve assistance: No  
 Online direct pay: No  
 Previous customer number:

6. Manage Auto Pay
  - a. Enroll in auto pay
  - b. Unenroll in auto pay
  - c. If wanting to switch from Portal Auto Pay to office ACH file/Direct Pay, customer must unenroll from Portal autopay
  - d. If wanting to switch from office ACH file/Direct Pay to portal AutoPay, office must delete/inactivate customer's Direct Pay first
  - e. If wanting to switch payment information for Portal AutoPay, customer must unenroll from AutoPay and then reenroll with new payment information
7. Manage Wallet
  - a. Options to delete saved payment types
  - b. Change paperless billing choice
  - c. Add/remove phone number for text messages

Profile

Profile ☐

Utility Profile ☒

Accounts Receivable Profile ☐

Wallet ☐

Utility Profile

Use the form below to update your info

☒ Enrolled in paperless

SAVE



## 8. Link Another Account

### LINK UTILITY ACCOUNT

Please enter the following details in order to find and link your utility account

Customer Number\*




Last Name or Last Bill Amount

Submit

9. Unlink Account – Moving across town and getting a new customer account/number? Unlink the old one! Link the new account!

## Customer View – Bills and Payments

View account history of transactions and bills (if processed through Splitter/Email Bills)

Utility Bills		Bills and Payments			
Home					
Bills and Payments					
Graphs					
Communications					
Manage Auto Pay					
		Date ↓ 1	Description ↑ 2	Amount	Balance
	<a href="#">View</a>	2/28/2025	Billings	\$94.81	\$94.80
		2/28/2025	Payments	(\$104.25)	(\$0.01)
	<a href="#">View</a>	1/31/2025	Billings	\$104.63	\$104.24
		1/31/2025	Payments	(\$212.00)	(\$0.39)
	<a href="#">View</a>	12/31/2024	Billings	\$109.23	\$211.61
		12/31/2024	Payments	\$0.00	\$102.38

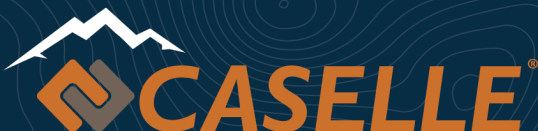
1. Click on View to see pdf version of bill (only available if attachment is on customer account in Caselle processed through Splitter/Email Bills)
2. Click on Amount to view breakdown of transactions/payments

#### Transaction Details

Date ↓	Srv Desc	Description	Amount	Usg/Qty	Type
2/28/2025	WATER	Import Readings	\$27.35	29	Billing
2/28/2025	SEWER	Automatic Billing	\$43.61	29	Billing
2/28/2025	GARBAGE	Automatic Billing	\$19.00	00	Billing
2/28/2025	STORMWATER	Automatic Billing	\$3.00	00	Billing
2/28/2025	STORMWATER S...	Automatic Billing	\$0.21	03	Billing
2/28/2025	WATER EXCISE ...	Automatic Billing	\$1.64	27.35	Billing

#### Transaction Details

Date ↓	Srv Desc	Description	Amount	Usg/Qty	Type
2/28/2025	WATER	UTILITY PAYMENTS	(\$31.47)	00	Payment
2/28/2025	SEWER	UTILITY PAYMENTS	(\$48.66)	00	Payment
2/28/2025	GARBAGE	UTILITY PAYMENTS	(\$19.00)	00	Payment
2/28/2025	STORMWATER	UTILITY PAYMENTS	(\$3.00)	00	Payment
2/28/2025	STORMWATER S...	UTILITY PAYMENTS	(\$0.21)	00	Payment
2/28/2025	WATER EXCISE ...	UTILITY PAYMENTS	(\$1.91)	00	Payment
1/31/2025	WATER	UTILITY PAYMENTS	(\$30.86)	00	Payment
1/31/2025	SEWER	UTILITY PAYMENTS	(\$46.61)	00	Payment
1/31/2025	GARBAGE	UTILITY PAYMENTS	(\$18.20)	00	Payment



**CHARTING NEW TERRITORIES  
CONQUERING NEW FRONTIERS**

Customer View – Graphs

View graphs of metered usage services (separate graphs for each metered service) as well as total billing amounts. Graphs can be printed using the “hamburger” icon on the top right side of each graph.



## Customer View- Communications

A great place to post your annual utility rates, a quarterly newsletter, or any other communication flier you may have that usually gets mailed to your customers.

The latest communication added can also be included in the body of the email of the Email Bills for that period. (See Admin section on Communications)

The screenshot shows the 'City of Civic Systems' interface. The header includes the 'City of Civic Systems' logo and a 'Departments' dropdown menu. The left sidebar, under 'Utility Bills', lists navigation options: Home, Bills and Payments, Graphs, Communications (which is highlighted), and Manage Auto Pay. The main content area, titled 'Communications', features a table with two rows. The first row is for '2025 Utility Rates' and the second is for 'Quarter 3 Newsletter'. Each row has a blue 'VIEW' button to its left.

	Description
<a href="#">VIEW</a>	2025 Utility Rates
<a href="#">VIEW</a>	Quarter 3 Newsletter

## Customer View – Manage Auto Pay

Manage Auto Pay – enroll, unenroll, verify scheduled payment

- a. Enroll in auto pay
  - i. Days Prior to Due Date
    1. Due Dates can change period to period, so this allows the payment date to reflect based on the due date of the current period rather than a calendar day
  - ii. Would you like to establish a maximum payment amount for autopay?
  - iii. NOTE: If your bill is currently due a payment will automatically be taken on today's date to pay off that balance
    1. THIS INCLUDES ENTIRE BALANCE DUE TAKEN IMMEDIATELY
  - iv. Click Next
  - v. Enter Payment Details
  - vi. Click Schedule auto pay

## Manage Auto Pay

1 Schedule

2 Payment Method

Select the number of days prior to due date

Days prior to due date\*

☐ Would you like to establish a maximum payment amount for autopay?

**Note:** If your bill is currently due a payment will automatically be taken on today's date to pay off that balance.

Next



Success!



☐ Checking Account

☐ Savings Account

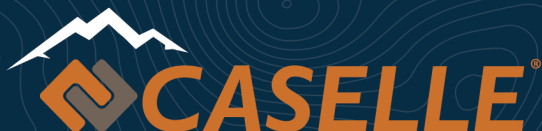
Schedule auto pay

- a. Unenroll in auto pay
- b. If the customer is wanting to switch from Portal Auto Pay to office ACH file/Direct Pay, customer must unenroll from Portal autopay
- c. If the customer is wanting to switch from office ACH file/Direct Pay to portal AutoPay, office must delete/inactivate customer's Direct Pay first
- d. If customer is wanting to switch payment information for Portal AutoPay, customer must unenroll from AutoPay and then reenroll with new payment information

NOTE: If customer enrolls in AutoPay after the current due date WITH a balance due, the entire balance due will be taken immediately.

If customer enrolls in AutoPay after the due date WITHOUT a balance due, they will not see a currently scheduled payment as the first scheduled payment will occur after the closing of the next billing period.

If customer enrolls in AutoPay before the current due date, but chose for the payment to be scheduled earlier than the enrollment date, the payment will be taken immediately. Example: Due date is the 15<sup>th</sup>, customer enrolls in autopay on the 12<sup>th</sup> but wants payments to be taken 5 days prior to the due date (ie the 10<sup>th</sup>), when the customer enrolls in AutoPay on the 12<sup>th</sup>, the payment will process immediately.

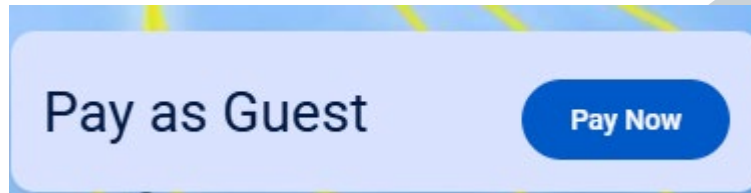


**CHARTING NEW TERRITORIES  
CONQUERING NEW FRONTIERS**

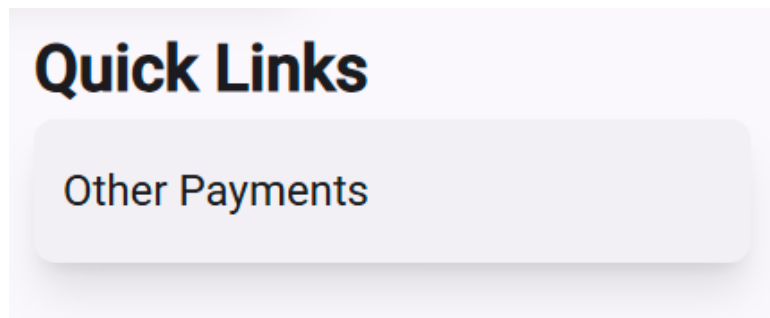
## Customer View – Pay as Guest/Miscellaneous Payments

A way for customers to pay without logging into the portal and/or a way to pay for additional distributions in Cash Receipting (eg parks and rec payments, community rentals, etc).

1. From the main page, click the button: Pay Now



2. From the home page after logging in: Click on Other Payments





3. Choose the Department aka Category


A screenshot of a web form titled "Other Payments". On the left, there is a blue button with a calendar icon and the text "Payment". On the right, there is a vertical list of steps: "1 Department", "2 Payment Type", and "3 Payment Details". The "1 Department" step is currently active. Below it, there are five radio button options: "UTILITY BILLING", "ACCOUNTS RECEIVABLE", "Charges to Public", "Parks and Rec", and "Misc Tax and Tax Equivalents". Below these options is a blue "Next" button.

4. Choose the Payment type aka Distribution

Other Payments

 Payment


 Department


**2**  Payment Type


- ☐ SWIM LESSONS
- ☐ MEMBERSHIPS
- ☐ SALES
- ☐ MISC. PROGRAMS
- ☐ BASKETBALL
- ☐ FLAG FOOTBALL
- ☐ WEIGHT CLASSES
- ☐ SHOOTING STARS
- ☐ WRESTLING
- ☐ LITTLE TYKES TBALL
- ☐ TACKLE FOOTBALL


5. If an interfaced category it will require a customer number, permit number, etc
6. If it is a non-interfaced category, the customer can type in the name of the payor
7. Enter the Amount to pay

Other Payments

 Payment

 Department

 Payment Type

**3**  Payment Details

Customer Name  
Maria Hornby

Email  
mhornby@caselle.com

Amount  
100.00

Comments  
Swim lesson application # 59845

**Payment Method**

☐ Credit Card

☒ Checking Account

Routing Number

Account Number\*


Account Number (confirm)\*

**Payment summary**

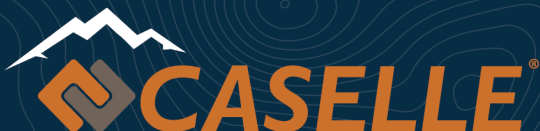
Amount	\$100.00
Service Fee	Enter details
<b>Total</b>	<b>Enter details</b>

Pay now

Or

 Add to cart

Version - 1.0.0.86894



**CHARTING NEW TERRITORIES  
CONQUERING NEW FRONTIERS**

8. Comments may or may not be required to include further information to connect the payment to records
9. Enter payment details and either pay now or add to shopping cart to add another department/payment type
10. Service fees will populate once payment details are entered in full and verified
11. Customer will receive a Payment Confirmation page and an emailed receipt once payment is complete.

## Admin View – Utility Billing Portal Configuration

### Utility Billing – Portal Configuration

Use this section to change the main Utility Billing Home page message, update any email body being sent for utility purposes (including Splitter/Email Bills), etc.

Most of this section is setup with your trainer initially, but you can always make changes.

Utility Bills

- Home
- Bills and Payments
- Graphs
- Communications
- Manage Auto Pay

Administration

- Portal Configuration**
- Landlord Management
- Portal Users
- Scheduled Payments
- Customer Autopay
- Utility Communications

Portal Configuration

Save

General Email Billing Email(s) Payment

☒ Utility Portal Enabled

☐ Use Service Categories

Home Screen Message (required)

Use this for auto payments, sign up for paperless billing and more!

Direct Pay Message

AUTO PAY - DO NOT PAY

Splitter Bill File Attachment Description Match

Utility Bill - (Bill Date)

Bill Date Format

MM/dd/yyyy

Version - 1.0.0.86894

#### 1. General

- a. The Home Screen Message is the at the top of the Utility Bills – Home screen. Use this to draw your customer’s attention to new Communications posted, or simply to point them towards paperless billing.



**CHARTING NEW TERRITORIES  
CONQUERING NEW FRONTIERS**



## 2. Email

- a. Emails that are sent from the portal automatically based on additional data: payment reminders, overdue payment reminders, autopay failed, etc.

## 3. Billing Email(s) aka Splitter/Email Bills

- a. This is where you can update the body of the email that goes out with the Splitter/Email Bills. Add the latest communication link here once you add a new communication pdf.
- b. Be careful which Template you are changing as here will be ALL forms that run through Splitter including Final Bills, Delinquent Notices, Accounts Receivable Invoices, etc. Any form in Caselle that is set up with Splitter will be here.

## 4. Payment

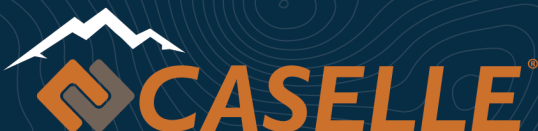
- a. This section includes the option to block customers from paying certain ways.
- b. Call Caselle Support to help you set up a User-Defined Field in Caselle as a checkbox
- c. Tell the portal here what the name of the UDF is
- d. Check the box of the UDF on the Customer account (Modify Existing Customers) to block the customer from being able to pay a specific way.

## Admin View – Landlord Management

Use this section to link registered Portal users to a specific Landlord or Cosigner in Caselle. This will link all customer accounts that are attached to the cosigner/landlord to the portal user. Anything that the customer sees in the customer account in the portal, the landlord/cosigner will have access to as well.

Remember that the wallet is not connected to the customer account but is connected to the registered portal user. A landlord and a tenant can both see the tenant's account and make payments as needed, but the payment detail information for the tenant cannot be seen by the landlord and vice versa.

The screenshot displays the 'Landlord Link' section in the Caselle Admin View. The sidebar on the left includes sections for 'Utility Bills' (Home, Bills and Payments, Graphs, Communications, Manage Auto Pay) and 'Administration' (Portal Configuration, Landlord Management, Portal Users, Scheduled Payments, Customer Autopay, Utility Communications). The 'Landlord Management' option is currently selected. The main area shows a table titled 'Landlords / Cosigners' with columns for 'Email', 'Landlord', and 'Cosigner'. There are buttons for '+ ADD A ROW' and 'ADD POPUP'. A search bar with the text 'mho' is active. Below the search bar, a dropdown menu is open, showing search results for 'ABC Management Group (7237 Holiday Square)' and 'Jones, Joe (111 Center St)'. The table currently lists two entries: 'mhornby@clivicsystems.com' linked to 'ABC Management Group (7237 Holiday Square)' and 'mhornby@caselle.com' also linked to 'ABC Management Group (7237 Holiday Square)'.



**CHARTING NEW TERRITORIES  
CONQUERING NEW FRONTIERS**

## Admin View – Portal Users

This list is of any Utility customer account that has been linked to a Portal user. Admin has access to click the trash can on the right side to Unlink a utility account from a registered portal user.

<b>Utility Bills</b> <ul style="list-style-type: none"><li>Home</li><li>Bills and Payments</li><li>Graphs</li><li>Communications</li><li>Manage Auto Pay</li></ul> <b>Administration</b> <ul style="list-style-type: none"><li>Portal Configuration</li><li>Landlord Management</li><li><b>Portal Users</b></li><li>Scheduled Payments</li><li>Customer Autopay</li><li>Utility Communications</li></ul>	<b>Portal Users</b>		
	Customer Number	Customer Name	Email
	110101	Acme Manufacturing	mark.meyer@bakertilly.com
	110101	Acme Manufacturing	chad.jarvi@gmail.com
	110101	Acme Manufacturing	mgilson9999@gmail.com
	110101	Acme Manufacturing	admin@civicsystems.com
	110101	Acme Manufacturing	cjarvi@civicsystems.com
	110101	Acme Manufacturing	mhornby@civicsystems.com
	110101	Acme Manufacturing	jsmith@anycity.com
	110101	Acme Manufacturing	civicportal1@gmail.com

## Admin View – Scheduled Payments

**The MOST important task for admin is clicking the Schedule Payment button AFTER closing the billing period in Caselle.**

Autopay looks at the Balance Due/Equal Pay field in Caselle to get the amount to schedule for payment; if you forget to close the period before running this, the balance due will be incorrect for the billing period and will schedule incorrect payments.

If clicking Schedule Payments is forgotten in the After the End of the Month process, you will want to schedule payments as soon as possible, noting that you may be taking some customers' payments immediately depending on timing – contact Support if you have questions or need help in this instance.

This screen is broken into 2 sections: Scheduled/Previous Payments and Customers with autopay enabled but no scheduled payments.

<b>Utility Bills</b> <ul style="list-style-type: none"><li>Home</li><li>Bills and Payments</li><li>Graphs</li><li>Communications</li><li>Manage Auto Pay</li></ul> <b>Administration</b> <ul style="list-style-type: none"><li>Portal Configuration</li><li>Landlord Management</li><li>Portal Users</li><li><b>Scheduled Payments</b></li><li>Customer Autopay</li><li>Utility Communications</li></ul>	<b>Scheduled Payments</b> <a href="#">Schedule Payments</a>									
	<b>Scheduled/Previous Payments</b>									
	Customer	Cust...	Date	Am...	Method	Type	Last ...	Status	Auto Pay Enrollment Date	Sch...
	110101	Acme Man...	8/31/2023	\$395.95	CC	Automatic	1111	The SSL connection coul...	4/22/2025, 12:21 PM	
	110101	Acme Man...	6/17/2024	\$395.95	R	Automatic	1111	8611402075	4/22/2025, 12:21 PM	
	110101	Acme Man...	8/6/2024	\$395.95	R	Automatic	1111	token is invalid. <field>:1...	4/22/2025, 12:21 PM	
	110101	Acme Man...	1/13/2025	\$395.95	R	Automatic	1111	8612896142	4/22/2025, 12:21 PM	
	110101	Acme Man...	1/31/2025	\$395.95	R	Automatic	1111	8613058772	4/22/2025, 12:21 PM	
	110101	Acme Man...	2/4/2025	\$395.95	R	Automatic	1111	8613090962	4/22/2025, 12:21 PM	
	110101	Acme Man...	4/14/2025	\$395.95	R	Automatic	1111	8613644522	4/22/2025, 12:21 PM	
	<b>Customers with auto pay enabled but no scheduled payments</b> It is normal for this list to have many customers while working on billing. Click the button <b>Schedule Payments</b> in the upper right corner to schedule payments once billing has been completed. This list should only have customers with no balance due after scheduling payments. It will NOT cause issues to click this button more than one time, only new payments will be scheduled.									



**CHARTING NEW TERRITORIES  
CONQUERING NEW FRONTIERS**

## Scheduled/Previous Payments

1. This section lists out every Auto Pay payment that has been either scheduled for the future or previously been processed.
  - a. You can filter down by any of the columns to find a specific customer, payment, error message, etc
  - b. The icon on the right side of the box next to the X allows you to export the currently shown data to Excel
2. STATUS column
  - a. Numbers = Confirmation number that correlates with the Confirmation number in Cash Receipting as well as the confirmation number that connects to the payment provider.
  - b. Error messages = ways to find out why a payment was not successful. Send this error to Support if you have questions on the meaning of the error.
  - c. Pending = Scheduled for future date

## Customers with autopay enabled but no scheduled payments

1. This list includes customers in a limbo and are waiting for the next payment to be scheduled
  - a. Customers that sign up for autopay with a \$0 balance
  - b. Customers that sign up for auto pay after the due date in the current period
  - c. Customers that signed up for autopay in a previous period and the current payment has already been processed

## Admin View – Customer Autopay

This section shows you a list of all customers that have enrolled in AutoPay. It gives you some of the payment details (Payment type, Last 4) as well as the Enrollment Date.

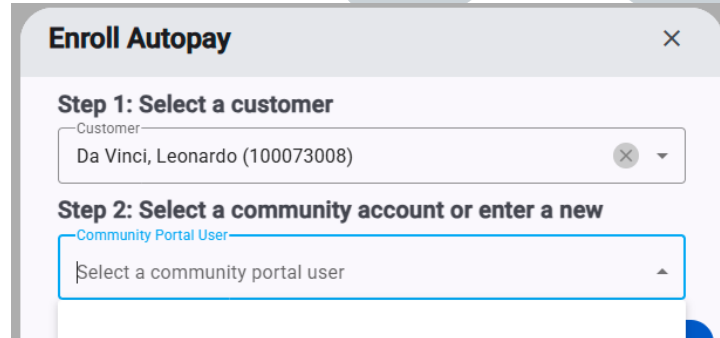
Admin can enroll customer in autopay if customer is having issues doing so themselves.

The screenshot displays the 'Auto Pay Customers' section of an administrative dashboard. On the left, a sidebar lists various utility and administrative functions. The main content area features a table with columns for customer identification and payment details. The table is currently empty, indicating no active customers are listed. A button to 'Enroll Customer' is located in the top right corner of the main area.

Cust #	Cust Name	Payment Type	Type	Last Four	Auto Pay Enrollment Date
No data					

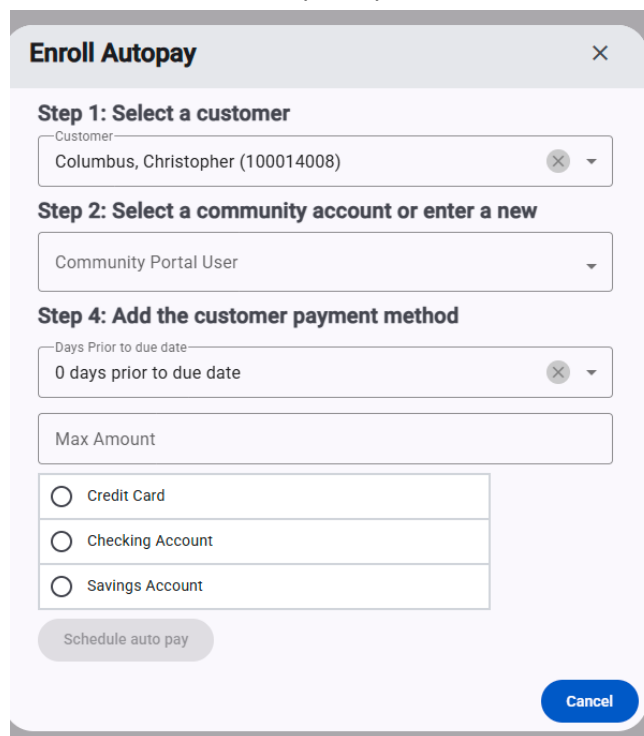
To enroll customer in AutoPay:

1. Click Enroll Customer
2. Choose customer account and either a registered portal user, or enter the customer's email address.



The screenshot shows the 'Enroll Autopay' dialog box. Step 1, 'Select a customer', has a dropdown menu with 'Da Vinci, Leonardo (100073008)' selected. Step 2, 'Select a community account or enter a new', has a dropdown menu with 'Community Portal User' selected. The dialog box has a close button (X) in the top right corner.

3. Payment information fields will show up for you to choose how many days prior to the due date, if there is a max amount allowed through autopay and then enter the customer's payment details.
4. Click Schedule AutoPay and you're finished!



The screenshot shows the 'Enroll Autopay' dialog box, Step 4, 'Add the customer payment method'. It has a dropdown menu for 'Days Prior to due date' with '0 days prior to due date' selected. Below this is a text field for 'Max Amount'. There are three radio button options: 'Credit Card', 'Checking Account', and 'Savings Account'. At the bottom, there is a 'Schedule auto pay' button and a 'Cancel' button.

## Admin View – Utility Communications

A great place to post your annual utility rates, a quarterly newsletter, or any other communication flier you may have that usually gets mailed to your customers.

Utility Bills

- Home
- Bills and Payments
- Graphs
- Communications
- Manage Auto Pay

Administration

- Portal Configuration
- Landlord Management
- Portal Users
- Scheduled Payments
- Customer Autopay
- Utility Communications

Utility Communications

This page can be used to upload communications that will be viewable to utility customers [here](#). They may also be included with utility bills using the "LatestCommunicationLink" field in the email template.

Upload Attachment(s)

You can also drop the attachment file here to upload (Max Size 25MB)

Description	Expiration Date	
2025 Utility Rates	12/31/2025	<a href="#">✎</a> <a href="#">🗑</a>
Quarter 3 Newsletter	9/30/2025	<a href="#">✎</a> <a href="#">🗑</a>

The latest communication added can also be included in the body of the email of the Email Bills for that period.

To add a new document:

1. Click Upload Attachment(s)
2. Browse out to where pdf file is saved
3. Click on the pencil icon to update the Description (viewable to customers) and set an expiration date (if you wish to)

To delete an attachment:

1. Click on the trash can icon next to the name of the attachment you wish to delete

To add the latest attachment to the Splitter/Email Bills:

1. Navigate to Utility Bills – Portal Configuration – Billing Emails
2. Ensure you're looking at the template for Utility Bills
3. Choose the radio button that says: Other
4. Click your cursor in the body of the email where you want the link to populate
5. Click on the variable button <#> that'll bring the dropdown list of options
6. Choose LatestCommunicationLink

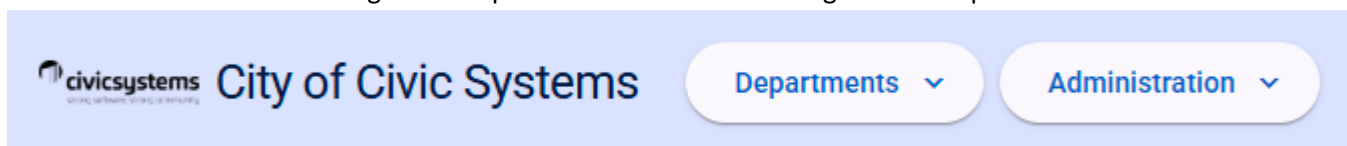
TIP: You can also send the Communications out as mass emails through the Admin – Portal Admin – Create Communications page. Choose all Portal users, all UM users, or pick and choose who you want to send the communication to (even one specific customer).

## Admin View – Admin – Portal Settings

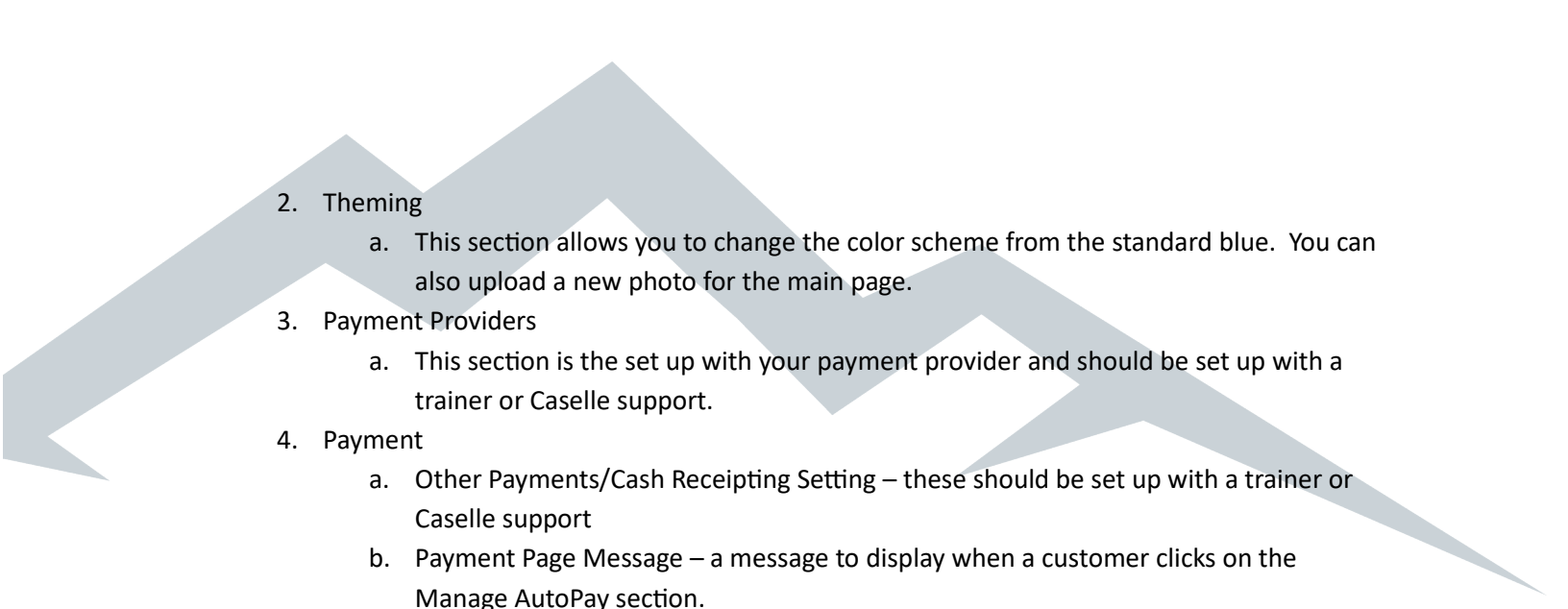
Main settings over the portal, not necessarily Utility Billing

### 1. General

- a. Main Navigation Drop Down Label – can be changed from Departments

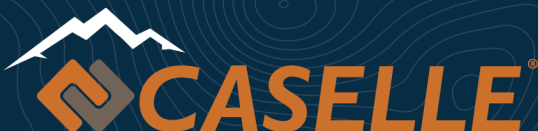


- b. Top/Bottom Login Screen Message boxes – these control the information in the box on the left side of the main portal page
- c. Landing Screen Message – The message on the home page after logging in
- d. Allow other payments – allows customers to use Miscellaneous Payments while logged into the portal
- e. Require comment for other payments – good idea to use if taking non-interfaced payments so the customer has to add more information
- f. Allow payments without logging in – this turns on the Pay as Guest on the main page
- g. Allow shopping cart – allows customers to add multiple distributions to one payment; multiple utility accounts or a utility account and a miscellaneous payment
- h. Other Payments Screen Message – shows on the Miscellaneous Payment page

- 
2. Theming
    - a. This section allows you to change the color scheme from the standard blue. You can also upload a new photo for the main page.
  3. Payment Providers
    - a. This section is the set up with your payment provider and should be set up with a trainer or Caselle support.
  4. Payment
    - a. Other Payments/Cash Receipting Setting – these should be set up with a trainer or Caselle support
    - b. Payment Page Message – a message to display when a customer clicks on the Manage AutoPay section.
      - i. Usually set up with the service fee rates for autopay customers to know those apply
    - c. Payment Complete Page Message
      - i. This message is usually blank as there is a default page set up. This is the Payment Confirmation page that displays after making a payment. If you want to have this say something specific, you can enter it in this box.
  5. COWS – Caselle Online Web Service
    - a. The MOST IMPORTANT communication tool as it is what allows Caselle to connect with anything that is on the internet (aka the portal).
    - b. This should be set up with a trainer
    - c. If COWS isn't running, payments will not be in Caselle. There is an email that is sent to Portal Admin users when this happens. Contact IT and ask them "to restart the Caselle Online Web Service on the server". If that doesn't fix the issue, contact Caselle support.
  6. Email
    - a. Automatic emails that send from the portal. These are set up with defaults but you can make any changes you may want to.
    - b. Payment Receipt – this is the generic receipt for payments made through Miscellaneous Payments, whereas the other modules allow module-specific variables to be added to the receipt.

#### **Admin View – Admin Email Events**

This section will be a running list of all emails sent from the portal. This does not include Splitter/Email Bills as those get sent through miviewpoint.



**CHARTING NEW TERRITORIES  
CONQUERING NEW FRONTIERS**



## Admin View – Admin – Email Events

This allows you to set up the timing of when certain emails get sent from the portal. For Utility Billing there is the payment reminder email and the payment late email that we set up here. Usually set up with a trainer, but you can make changes if you want to change the time that the email sends out or how many days before/after the due date.

Below is set up to send the Past Due Email at 6am 1 day after the due date.

The Payment Due Email is set up to send at 6am 3 days prior to the due date.

(Sunday means nothing for these emails, the day of the week is for emails sent weekly)

UMPastDueEmail	<input checked="" type="checkbox"/>	DaysAfter	6:00 AM	Sunday	<input type="checkbox"/>	1	<input type="checkbox"/>	
UMPaymentDueEmail	<input checked="" type="checkbox"/>	DaysPrior	6:00 AM	Sunday	<input type="checkbox"/>	3	<input type="checkbox"/>	

## Admin View – Admin – Pending Payments

This page should always be blank. If there is an issue with COWS or something else that causes payments to not post in Cash Receipting, they will be stuck here.

If there are payments here, they will have an error message – send that error message to Caselle support to help fix the issue.

Retry Now – forces the system to try to communicate to Caselle and post payments to Cash Receipting

Show Completed Payments – a list of all payments taken through the payment provider (this does include miviewpoint payments that are sent to the payment provider). You can export this list to excel.

This section is included in miviewpoint and the portal.

Administration

Portal Settings

Email Events

Notification Settings

Pending Payments

Forms Designer

Forms Definitions

Create Communications

Deposit Reconciliation

Custom Modules

Pending Payments

Payments shown here are currently processed through your payment provider but awaiting posting to Caselle. These are automatically retried once per hour. This page should be empty in most cases

Retry Now

Hide Completed Payments

Date ▾	Payment Amount ▾	Email ▾	Trans... ▾	Module ▾	Error ▾
7/10/2025, 12:36 PM	47.48	meyer.mark.j@gmail.com	8614787...	MISC	
5/29/2025, 11:57 AM	45	admin@civicsystems.com	8614134...	Custom...	miViewPointExtreme.SharedCore.Infrastructure.Exceptions.CowsException:...
5/19/2025, 6:58 PM	15		8613993...	Custom...	miViewPointExtreme.SharedCore.Infrastructure.Exceptions.CowsException:...



## Admin View – Admin – Forms Designer/Forms Definitions

For Utility Billing we use our forms out of Caselle directly. For other modules such as Building Permits and Custom Modules, they will use this form designer and definitions to allow for customers to print a permit or application.

## Admin View – Admin – Create Communications

This area is great for sending mass emails to portal users.

Mass text messages are an option, but at an additional cost (email [mlaesch@caselle.com](mailto:mlaesch@caselle.com) for a quote if interested).

You can include utility communications with this email or simply send out a message to portal users. Simply add in a subject for the email, write the body, include an attachment if needed, and click the send button on the top right corner.

The screenshot shows the 'Create Communications' interface. On the left is a sidebar with the following navigation items: Administration, Portal Settings, Email Events, Notification Settings, Pending Payments, Forms Designer, Forms Definitions, **Create Communications** (highlighted), Deposit Reconciliation, Custom Modules, and Custom Module Fees. The main content area has a blue header 'Create Communications' with a 'Send' button in the top right corner. Below the header, it says 'Fill out the form below to send notifications to the specified group'. The form includes an 'Email Group' section with radio buttons for 'All Portal Users' (selected), 'UM Portal Users', 'AR Portal Users', and 'Selected UM Portal Users'. There is an 'Attachment Links' section with a search bar and two links: '2025 Utility Rates' and 'Quarter 3 Newsletter', each with an 'Insert' button. At the bottom left, there is an 'Upload Attachment(s)' button and a note: 'You can also drop the attachment file here to upload (Max Size 25MB)'. The right side of the form is titled 'Email' and contains a 'Subject' input field and a large text area for the email body with a rich text editor toolbar. Below the email section is a 'Text Message' section with an 'Optional' input field.

## Admin View – Admin – Deposit Reconciliation

This section is to help with bank reconciliation. This is only available for customers with Zift as their payment provider.

Enter the date that the deposit from the Zift hit your bank. Choose which payment provider you wish, General, Utility, etc. If you only have only 1 account with Zift, you can choose either option. Click Retrieve Deposits.

This gives you a list of all payments (or returns) that are included in the deposit sent to the bank and the date that they were posted to Cash Receipting.

The screenshot shows the 'Deposit Reconciliation' interface. On the left is a sidebar with 'Administration' and various settings. The main area has a blue header 'Deposit Reconciliation'. Below it are input fields for 'Deposit Date' (8/19/2025) and 'Payment Provider' (General), with a 'Retrieve Deposits' button. A 'Receipt Date' dropdown is also present. Below these is a table with columns for Confirmation Number, Remittance Date, Deposit Amount, Receipt Number, Transaction Date, Transaction Amount, Receipt Amount, Transaction Type, Payment Type, and Holder Name. Each column has a search icon. The table is currently empty.

Confirmation Number	Remittance Date	Deposit Amount	Receipt Number	Transaction Date	Transaction Amount	Receipt Amount	Transaction Type	Payment Type	Holder Name
---------------------	-----------------	----------------	----------------	------------------	--------------------	----------------	------------------	--------------	-------------

## Admin View – Admin – Custom Modules/Custom Module Fees

Custom Modules are an additional module (email [mlaesch@caselle.com](mailto:mlaesch@caselle.com) for a quote or more information) that can be used for a variety of purposes where a customer fills out a form and sends it into the office.

## Frequently Asked Questions

### 1. Customer cannot link utility account to portal account

- a. When logged in as Admin to the portal, can you link the customer account? If so, customer is typing something incorrectly.
- b. If you cannot link the customer account to your Admin portal account:
  - i. Check in Utility Management – Modify Existing Customer
  - ii. Search for the customer account
  - iii. Next to the Name field is an ellipsis button, click this and verify the customer's LAST NAME for linking to the portal
- c. TIP: Customer number field can include dashes/periods or not.
- d. TIP: Last Name Field can be upper case or lower case

Caselle Connect® > Utility Management > Customers > Modify Existing Customers

Caselle Connect® Modify Existing Customers

Customer: 9-99 (Doe, Captain and Mrs.) Location: 1220 Center Street

Customer Services Deposits Assistance Meters Contracts Loans Direct Pay Backflow Attachments

Customer 1 Customer 2 Alternate Mailing

Customer number: 999

Name: Doe, Captain and Mrs. ...

Secondary name:

Address line 1: 1184

Address line 2:

City: Civic

State/Province: IA

Zip/Postal code: 5999

Country/Region:

Mail route:

Attention:

Telephone 1:

Name Details

Name: Doe, Captain and Mrs.

First: Captain

Middle: and Mrs.

Last: Doe

Suffix:

OK Cancel

### 2. Which email receives the Splitter/Email bill when they choose Paperless Billing in the portal?

- a. When a customer enrolls for the portal and links the utility account, they can choose to go to paperless billing, which sends them the Splitter/Email Bill each period.

- b. If 2 customers are signed up for the portal and linked to the same utility account, both will receive the Splitter/Email Bill if 1 of them signs up emailing – it will not let you choose that one portal user gets emails and the other does not.
- c. If a customer account in Caselle previously had an email address on the customer account and the customer signs up for the portal and paperless billing using a different email address, Splitter/Email Bill will email the bill to BOTH email addresses.
  - i. To change this, simply remove the email address from the Email field in Caselle. The Splitter/Email Bill will still email to the email address used by the portal user.

### 3. Scheduled Payments for Portal AutoPay

The screenshot shows the 'City of Civic Systems' portal interface. On the left is a sidebar with 'Utility Bills' and navigation links: Home, Bills and Payments, Graphs, Communications, and Manage Auto Pay. The main content area is titled 'Scheduled Payments' and includes a 'Schedule Payments' button. Below this is a section for 'Scheduled/Previous Payments' which contains a table with columns for Customer, Cust..., D..., Am..., and Method. The table is currently empty.

- a. This should be in your checklist to be completed AFTER closing your period.
- b. DO NOT close your period on the last day of the period (e.g. if your period closes on the last day of the month, you MUST wait until the 1<sup>st</sup> of the month or the next business day if the 1<sup>st</sup> falls on the weekend/holiday)
- c. If you Schedule Payments BEFORE closing the period, you will not be scheduling auto payments for the period that you just billed, leading to all those customers who should be paying via AutoPay to NOT paying their bill and then possibly erroneously being eligible for penalties and delinquencies.
- d. The reason we wait until after the period is closed is because Caselle allows us to make all sort of changes to our customers while our period is open (think of how easy it is to change a meter read while the period is open – Enter Meter Reading – versus when we have to correct a prior period's meter read – Correct Prior Read/Usages). To Caselle, when we close our period, we are claiming that the billing period is complete and we no longer need to make changes to the current bill. It is this finality in closing the period that finally sends our Splitter/Email Bill pdfs to the portal for customers to view, updating the Balance Due to the current bill amount, and allowing us to Schedule Payments for that current bill.

#### 4. How do I add a Category for customers to pay for using Miscellaneous Payments/Pay as Guest?

- a. Cash Receipting – Organization – Categories
  - i. Click on the Distributions tab and find the distribution you'd like to offer through the portal
  - ii. Check that the box for Allow online payments is checked
  - iii. Click on the User-Defined tab and check that Allow Portal Payments is checked

Caselle Connect® > Cash Receipting > Organization > Categories

Category: 15 (Parks and Rec) Tax:

Category Court Management Source Validation Distributions Notes

Priority	Code	Description	Tax
1	1513	SWIM LESSONS	
2	1501	MEMBERSHIPS	
2	1502	ADMISSIONS	
3	1503	CONCESSIONS	
4	1504	REC CENTER RENTALS	
5	1505	SALES	
6	1506	SHELTER HOUSE RENT	
7	1507	MISC. PROGRAMS	
8	1508	BASKETBALL	
9	1509	FLAG FOOTBALL	
10	1510	WEIGHT CLASSES	
11	1511	SHOOTING STARS	
12	1512	WRESTLING	
14	1514	LITTLE TYKES TBALL	
15	1515	TACKLE FOOTBALL	
16	1516	VOLLEYBALL	
17	1517	SPIN CLASS	
18	1518	DANCE	
19	1519	YOGA	
20	1520	SALES TAX	
20	1526	SOCCER	
21	1521	Wrestling Fundraiser	
22	1522	Beautification Funds	
23	1523	Encounter W/ Art	

Distribution User-Defined Notes

Distribution code: 1513

Priority: 1

Description: SWIM LESSONS

Title: SWIM LESSONS

☐ Stop at description field

☐ Calculate a tax rate of: 0.0000 %

☒ Allow online payments

Default payment type: CHECKS

GL account: 001-4-440-1-4513 PROGRAMS

☐ Summarize on GL update

GL activity: 9 Swim

☐ Allow GL activity to be modified

Job number:

☐ Prompt for job number

Default amount: .00

Deposit service:

☒ Allow new receipts

Category: 15 (Parks and Rec) Tax:

Category Court Management Source Validation Distributions Notes

Priority	Code	Description	Tax
1	1513	SWIM LESSONS	
2	1501	MEMBERSHIPS	
2	1502	ADMISSIONS	
3	1503	CONCESSIONS	
4	1504	REC CENTER RENTALS	

Distribution User-Defined Notes

☒ Allow Portal Payments

- b. Allow Portal Payments
  - i. Allows us to offer this distribution in the PORTAL
- c. Allow online payments
  - i. Allows us to use this in the portal AND miviewpoint Cash Receipting
- d. TIP: If you want to take credit card payments for a certain distribution in the office and not in the portal, you can check the Allow online payments and leave Allow Portal Payments unchecked. (e.g. various licenses and permits that require physical paperwork to be collected in office but you want to offer credit cards as a payment type).