

## Paperless Billing Setup Instructions and FAQs

A webpage and URL for your customers to register and sign up for paperless billing and Self Service online access.

### Setting Up Your Unique URL or address to your webpage.

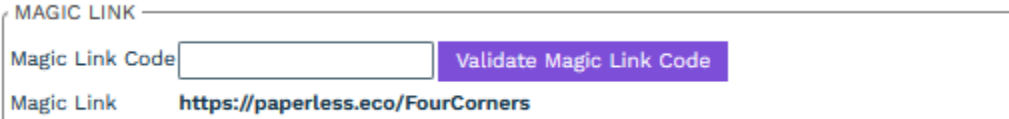
Your unique webpage address (URL) is setup at the company level within your Lockstep account.

The base URL is the same for all companies and you just need to add an easy and unique company identifier for your customers:

***paperless.eco/company***

To setup go to: Admin > Master File > Company

- Edit the company record.
- In the 'Magic Link' section, enter a self-created magic link code (company identifier) for your company and click the 'Validate' button.
- You will be prompted to 'Try another' if the code is already taken.
- If the code is unique, the Magic Link URL will be updated and display.



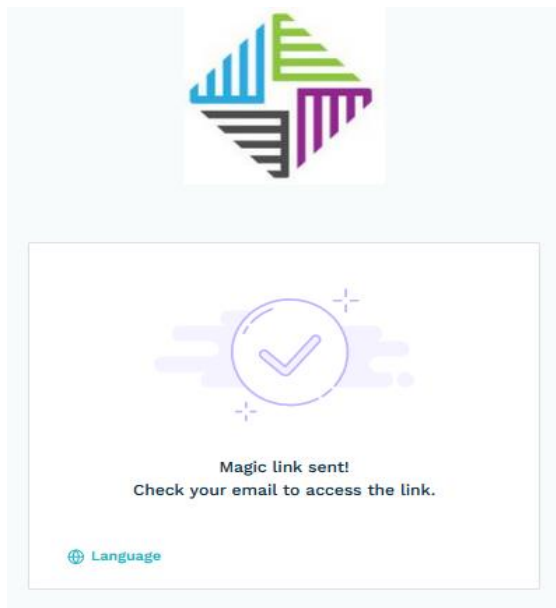
The screenshot shows a form titled "MAGIC LINK". It contains a text input field labeled "Magic Link Code" with a small square icon to its right. To the right of the input field is a purple button labeled "Validate Magic Link Code". Below the input field, the text "Magic Link" is followed by the URL "https://paperless.eco/FourCorners".

Other items to update for your new webpage:

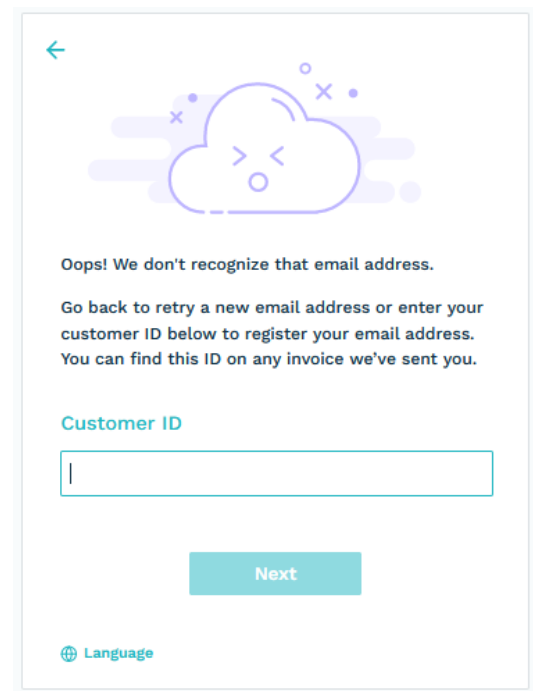
- A company logo can be displayed and is recommended for customer recognition.
- A company email setting should be set and is also recommended. This email address will display on your webpage and provide another way for your customers to contact you.

## Customer View and Onboarding Steps

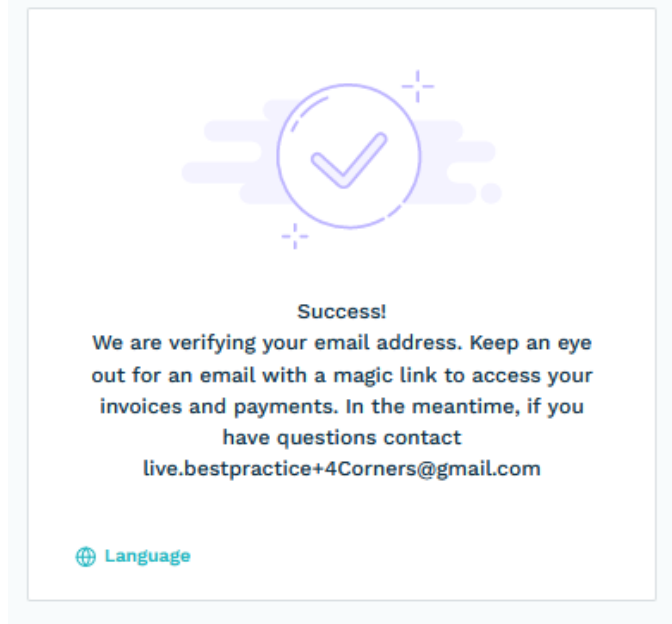
Your new webpage address or URL will display your company logo and will prompt the user to enter their email address. If the email address is not registered for your company, the user will be prompted to enter their customer ID:



If the customer ID is not recognized, the customer will be prompted to email your company email address displayed in the message on the webpage.

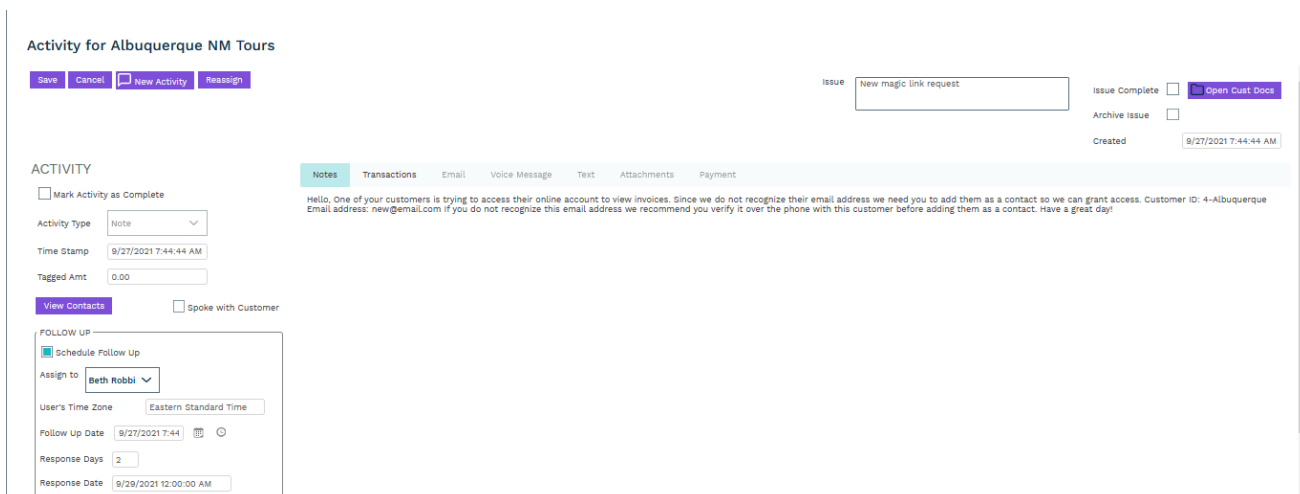


If the customer ID is recognized, your customer will be prompted to enter the AP department's primary email address:



A confirmation message will display that the email addresses is being verified for the magic link and will display the company email address if any questions in the meantime.

An activity will be created for the collector or user related to the magic link request based on the customer assignment:



The screenshot shows the "Activity for Albuquerque NM Tours" interface. At the top, there are buttons for "Save", "Cancel", "New Activity", and "Reassign". The "Issue" field contains "New magic link request". To the right, there are checkboxes for "Issue Complete" (unchecked), "Open Cust Docs" (checked), and "Archive Issue" (unchecked). The "Created" timestamp is "9/27/2021 7:44:44 AM". Below this is a tabbed interface with "Notes" selected. The note content reads: "Hello, One of your customers is trying to access their online account to view invoices. Since we do not recognize their email address we need you to add them as a contact so we can grant access. Customer ID: 4-Albuquerque Email address: new@gmail.com if you do not recognize this email address we recommend you verify it over the phone with this customer before adding them as a contact. Have a great day!". On the left side, under the "ACTIVITY" section, there are fields for "Activity Type" (Note), "Time Stamp" (9/27/2021 7:44:44 AM), and "Tagged Amt" (0.00). There are also checkboxes for "View Contacts" and "Spoke with Customer". Below that is a "FOLLOW UP" section with a "Schedule Follow Up" checkbox checked, an "Assign to" dropdown set to "Beth Robbi", a "User's Time Zone" set to "Eastern Standard Time", a "Follow Up Date" of "9/27/2021 7:44", "Response Days" set to "2", and a "Response Date" of "9/29/2021 12:00:00 AM".

## Paperless Billing and Customer Adoption FAQs

### What is Self Service?

Your customers can access all of their information online using the Self Service customer portal.

### What is a magic link?

Self Service is completely secure and does not require a username and password. Access to Self Service is provided by a 'magic link' that is created with an email from your Lockstep account, sent to a customer.

### How do I provide Self Service access without an email address?

You may not have an accurate email address for your all of your customers, but you want to provide a way for your customers to register and get online access. By setting You can setup a unique URL or webpage address for your customers to register online.

This webpage address or URL along with the customer ID can be added to your correspondences sent to your customers in the mail, such as a statement or invoice.

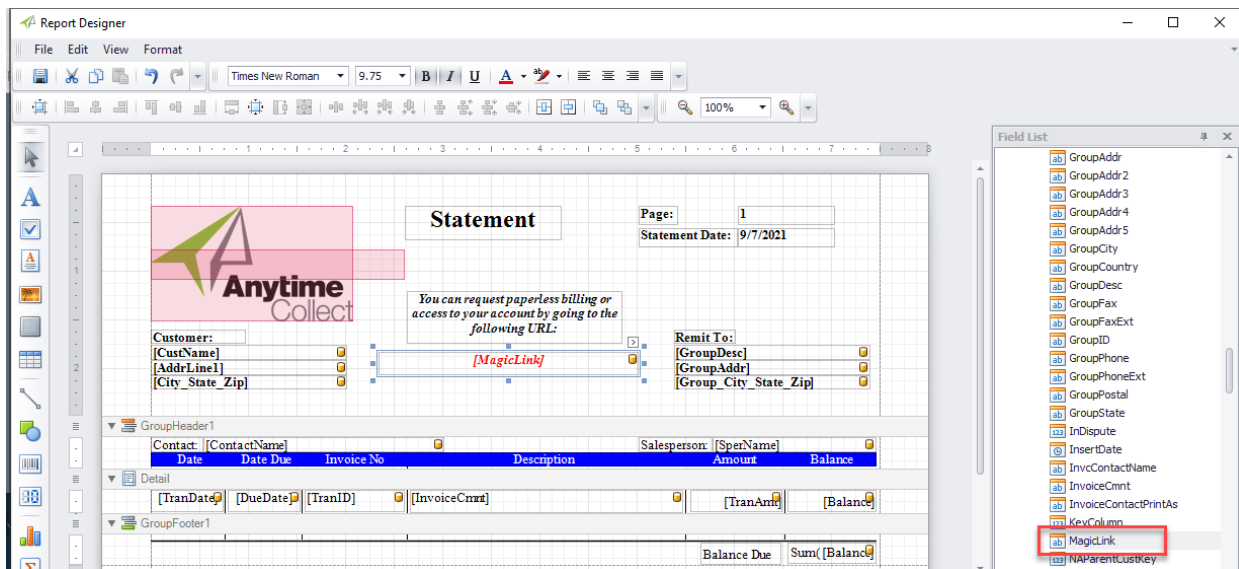
The webpage will walk your customers through the registration process in order to capture a good email address for future emails, paperless billing information, along with requesting a new magic link.

Is this new URL field available on Report Manager reports to print and mail to my customers?

There are 2 reports templates that now include this 'MagicLink' URL field. You can add this field to reports below by using the [Report Manager](#):

- Statement
- Invoice

The field name is: Magic Link. Reach out to [support@lockstep.io](mailto:support@lockstep.io) for assistance.



## Statement

Page: **1**  
Statement Date: **9/27/2021**

To sign up for Paperless Billing or request a magic link:

<https://paperless.eco/FourCorners>

CustID: 4-Albuquerque  
Albuquerque NM Tours  
500 South main  
albuquerque, NM 84555

Remit To Company: Four Corners  
500 South  
Moab, UT 84322  
435-555-1234