

Instructions for *EasyPay* Web Site Client Area



How to View *EasyPay* Monthly Reports Online:

1. If you have not set up your password yet, email **IFCEasy@aol.com** and give us your *EasyPay* Client ID # and a 6 character password. We will email you back complete instructions for viewing, along with your password confirmation.
2. Go to: **www.easypayinfo.com** and click on the box in the upper right hand corner of the home page marked “**Client Login**”.
3. The next screen will ask for your *EasyPay Client ID#* and *password*.
4. The next screen will let you choose either “*Display current month payments*” or, “*Request Change to Customer’s Account*”. Choose “*Display current month payments*” to view reports.
5. To view credit card activity, click the “*Credit Card*” line on this page.
6. You can print, or copy and paste the data directly into Microsoft Excel by going to EDIT>SELECT ALL>COPY. Bring the data in by opening a new Excel spreadsheet and choosing PASTE.
7. To exit the client section, click on “*Log Off*”.

How to Print Monthly Activity Reports:

1. After you’ve signed on and entered the client login area, you will see a date field that says “*Display reports for...*”. You will need to select the report date you want from the drop down date menu, and press “*Go*”.
2. The report you selected will be pulled up for viewing and printing. To print the report, simply print as you would any other document from your printer.



EasyPay Web Site Instructions

How to Make Online Changes to Your Customer's Account:

1. Go to www.easypayinfo.com and select the “*Client Login*” area as you normally would. Sign in with your password and select either: “*Display current month payments*” or, “*Request Changes to Customer's Account*”.
2. The easiest way to make a change is to select “*Display current month payments*”. When you do, you will see the word “change” under each customer's name on your list. If you click on the word “*change*” you will be taken to a *Customer Change* page for that customer.
3. The change page will automatically display the customer's information. You will only need to fill in a few fields to tell us what changes you want. The fields are self-explanatory, and offer a convenient drop-down calendar menu for date selections.
4. Next, select the “*Type of Payment*” (*Bank Draft, Credit Card, or Coupon/Statement*)
5. Fill in the “*Name of the payor*” and the *student*, and fill in the “*Current payment amount per month*” (and *new payment* amount if necessary).
6. Next, you **MUST** check one of the boxes down the left side of the screen, under the “*Type of Changes*” section. You must also enter a date for the requested change to take place.
7. Make any address changes or comments in the boxes at the bottom of the screen if necessary.

If you skip, or make an inaccurate entry in a required field, the program will prompt you to correct that field before it accepts the change.

Once you have made the changes you want, you simply click the “*submit*” button, and your change request will be sent. You will receive a separate email receipt for each change you make. Please allow 24 hours for receipts to arrive. *On rare occasions, a particular email address may have trouble receiving return email receipts from *EasyPay*. If you are not receiving email receipts, you may need to try a different email address to submit changes from.

Another way to make on-line changes is to log in and go directly to “*Request Changes To Customer's Account*.” If you use this method, your School Name and *EasyPay* Client ID# will automatically fill, but you will need to manually fill a few extra fields.

Instead of going to “*Request Changes To Customer's Account*”, the easiest way to make changes is by selecting the individual customer under “*Display Current Month Payments*”.

IMPORTANT NOTE** If your email address has changed since you first signed up for on-line access with *EasyPay*, our system must have your current email address in order for our computer to recognize you. Please email at: IFCEasy@aol.com to inform us of any new email address, or to request a password setup. Please don't call changes in, they must be emailed.