

Setting up Auto/Plaid Verification through CWP

Have the user sign into their CWP account and click the “ I want to set up AutoPay “ button.

Lorain County Sanitary Engineer

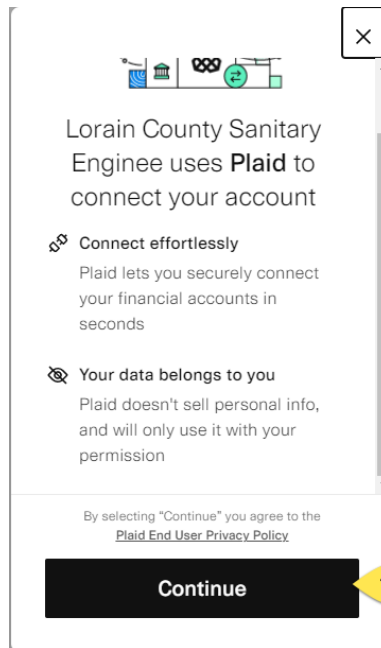
The screenshot shows the user's dashboard for Sandra Crow. The navigation bar includes links for Home, Make a Payment, Set Up AutoPay, Account History, and Account Preferences. The account information shows address 131 EDGEWOOD DRIVE GRAFTON, OH 44044. The main content area is divided into several sections: Pay Bill (Current Due \$0.00), Usage History, Account History, Message Center, and Financial History. A Help sidebar on the right lists options like Payment & Billing, Account Management, and User Profile. A red box highlights the 'I want to set up AutoPay' link in the Help section, with a yellow '1' in a circle next to it.

A window will appear, and the customer will need to enter in their email address

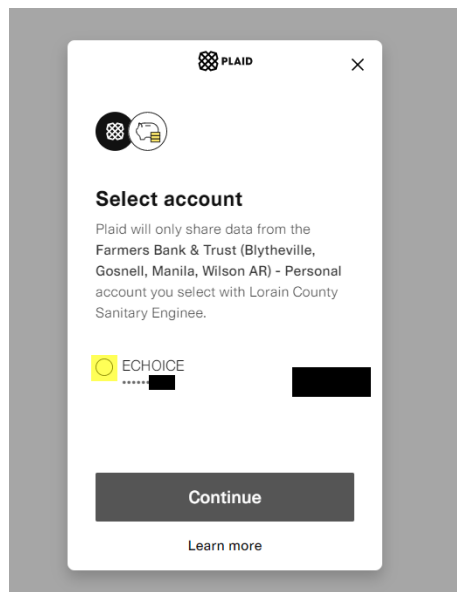
The 'Set AutoPay' modal window is displayed over the dashboard. It contains the following text: 'Please select a payment method below to use for automatic payments, then click the confirmation button at the bottom of the form.' Below this, it states: 'Note only "Verified" Plaid Accounts can be used for ACH/Bank Draft. If your linked account needs action, please complete those actions and return here to "SET AUTOPAY" for the verified bank account for ACH/Bank Draft payments.' The main instruction reads: 'We use Plaid in order to validate and link your bank account to your registered Customer Web Portal account. Please click the "Link Account" below if you would like to start this process. Note that, depending on your Financial Institution, there may or may not be a micro deposit verification step before you can use your bank account to make a payment. This validation process is only required once unless your bank account information is changed, at which point you will be required to validate your new account.' There is an input field for 'Email Address' with the value 'gsalzer@cusl.com'. Below the input field, it says: 'This email address will only be used for communicating information about the linked accounts. Communication will occur only when absolutely necessary.' At the bottom of the modal, there is a 'LINK ACCOUNT' button, and 'CANCEL' and 'CONFIRM' buttons.

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Press continue on the welcome screen for Plaid





1. The customer will need to select their Bank
2. Enter their Bank Log in
3. Enter a security code if one is present
4. Select their banking account
5. And then continue




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←  ×

Enter your credentials


By providing your **Farmers Bank & Trust (Blytheville, Gosnell, Manila, Wilson AR)** - **Personal** credentials to Plaid, you're enabling Plaid to retrieve your financial data.



Access ID
GrantSalzer 

Password
..... 

Submit

[Reset password](#)

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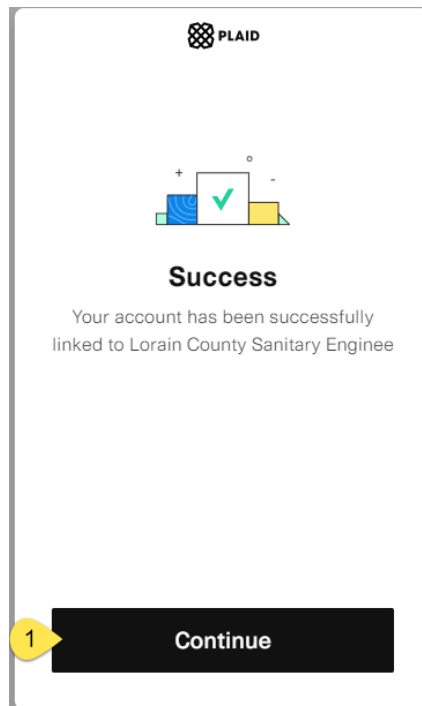
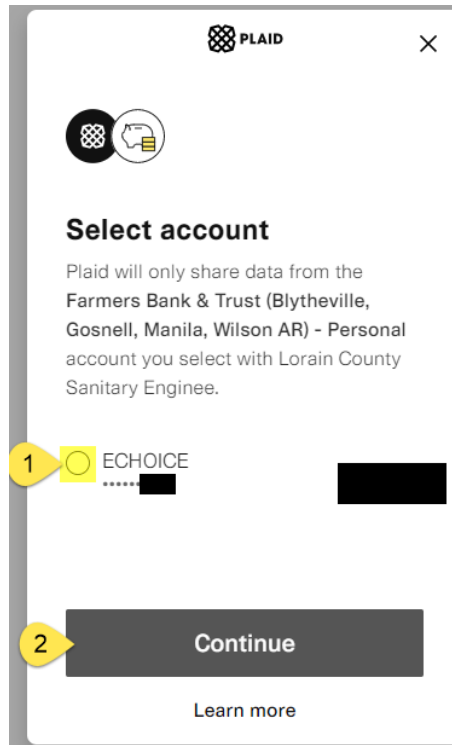
Verify your identity

Enter the security code **Farmers Bank & Trust (Blytheville, Gosnell, Manila, Wilson AR) - Personal** sent to (XXX) XXX-8233

Code
[REDACTED]

Submit

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The customer will need to select their newly linked account, ensure their email address is entered, and then click the confirm button.

(Note : If a message appears stating " Plaid did not have the following information to verify your account " The customer will need to enter their name that is on their bank account and then click the confirm button)

The screenshot shows a 'Set AutoPay' dialog box overlaid on a web page. The dialog box has a title bar with 'Set AutoPay' and a close button. Below the title bar, it says 'and return here to "SET AUTOPAY" for the verified bank account for ACH/Bank Draft payments.' The main content area is titled 'Bank Account' and contains a form with the following elements:

- A yellow circle with the number '1' next to a radio button.
- A bank icon and the text 'Bank Account ending in [REDACTED]'.
- A paragraph of text: 'We use Plaid in order to validate and link your bank account to your registered Customer Web Portal account. Please click the "Link Account" below if you would like to start this process. Note that, depending on your Financial Institution, there may or may not be a micro deposit verification step before you can use your bank account to make a payment. This validation process is only required once unless your bank account information is changed, at which point you will be required to validate your new account.'
- A text input field for 'Email Address' with the value 'gsalzer@cusi.com' and a yellow circle with the number '2' next to it.
- A blue button labeled 'LINK ACCOUNT'.
- A paragraph of text: 'This email address will only be used for communicating information about the linked accounts. Communication will occur only when absolutely necessary.'
- A red button labeled 'CONFIRM' with a yellow circle with the number '3' next to it.
- A small red text at the bottom: 'By clicking confirm, you authorize LORAIN COUNTY SANITARY ENGINEER DEPARTMENT to debit your account on a recurring basis.'

The background page shows a 'Manage AutoPay' section with a 'Bank Account' table and a 'Saved Payment Methods' section. The footer includes 'Lorain County Sanitary Department' contact information and a copyright notice for '© 2022 Continental Utility Solutions, Inc.'.

The customer will then get a message stating that they successfully signed up for autopay

The screenshot shows an 'AutoPay Enrollment Confirmation' dialog box overlaid on the 'Manage AutoPay' page. The dialog box has a title bar with 'AutoPay Enrollment Confirmation' and a close button. The main content area contains:

- A green checkmark icon.
- A paragraph of text: 'You have successfully signed up for recurring payments (AutoPay). Thank you!'.
- An 'OK' button.

The background page shows the 'Manage AutoPay' section with a 'Bank Account' table and a 'Saved Payment Methods' section. The top navigation bar includes 'Home', 'Make a Payment', 'Set Up AutoPay', 'Account History', and 'Account Preferences'. The user's name 'SANDRA L CROW' is visible in the top right corner. The footer includes 'Lorain County Sanitary Engineer' and a copyright notice for '© 2022 Continental Utility Solutions, Inc.'.

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The customer can then Set autopay (if it hasn't been already) / Remove Autopay (if it is set up)

0000001-0015 SANDRA L CROW Manage Accounts

Manage AutoPay

METHOD	EXPIRES	PAYMENT OPTION
Bank Account		
Bank Account ending in [redacted]	N/A	Pay Bill Amount

1 SET AUTOPAY 2 REMOVE AUTOPAY

Saved Payment Methods

METHOD	EXPIRES				
Bank Account					
Status	Bank Name	Bank Account Type	Routing Number	Account Number	Balance
	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

We use Plaid in order to validate and link your bank account to your registered Customer Web Portal account. Please click the "Link Account" below if you would like to start this process. Note that, depending on your Financial Institution, there may or may not be a micro deposit verification step before you can use your bank account to make a payment. This validation process is only required once unless your bank account information is changed, at which point you will be required to validate your new account.

Privacy Terms

The customer can then Link an additional account with plaid or unlink their current account with plaid

0000001-0015 SANDRA L CROW Manage Accounts

Link Account

METHOD	EXPIRES				
Bank Account					
Status	Bank Name	Bank Account Type	Routing Number	Account Number	Balance
	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

We use Plaid in order to validate and link your bank account to your registered Customer Web Portal account. Please click the "Link Account" below if you would like to start this process. Note that, depending on your Financial Institution, there may or may not be a micro deposit verification step before you can use your bank account to make a payment. This validation process is only required once unless your bank account information is changed, at which point you will be required to validate your new account.

1 * Email Address

This email address will only be used for communicating information about the linked accounts. Communication will occur only when absolutely necessary.

2 LINK ACCOUNT 3 UNLINK

Privacy Terms