

City of Coeur d'Alene

New Customer Portal User Guide



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Getting Started: Set up a New User – Step 1

The screenshot shows a web browser window with the URL <https://cdaid.billingdoc.net/login>. The page header includes the City of Coeur d'Alene logo and a 'Create an Account' button. The main content area features a welcome message and two buttons: 'Create An Account' and 'One-Time Payment'. The 'Create An Account' button is circled in blue, and a blue arrow points from a callout box to it. The callout box contains the text: 'New Users: Start by selecting 'Create An Account''. To the right, the login form includes fields for 'Email' and 'Password', a 'Remember me' checkbox, a 'Sign In' button, and links for 'Create An Account' and 'Forgot Password?'. The footer of the page reads 'Current branch: -V1.1.0'.

Getting Started: Set up a New User – Step 2

New Users:

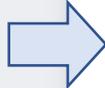
Making a new user account is easy! Simply enter your name, the email address you want to use, and a password.

Check Your Email

Once you fill in your information and hit submit, the system will send you an email confirmation code to confirm your email address. (See 'Confirmation Email Example.')

Subject: Email Confirmation Code

From: support@billingdoc.net



The screenshot shows a web browser window with the URL <https://cdaid.billingdoc.net/register>. The page header includes the City of Coeur d'Alene logo and navigation buttons for 'Create an Account' and 'Sign In'. The main content is a registration form with the following fields:

- Name:** Enter Full Name
- Email Address:** Enter Email
- Password:** Password 6-30 characters
- Confirm Password:** (Empty field)

At the bottom of the form are 'Submit' and 'Cancel' buttons, and a link for 'Already have an account? Sign In'.

To the right, a 'Confirmation Email Example' is shown. The email header is from 'Portal Support <support@billingdoc.net>' with the subject 'Email Confirmation Code'. The email body features the City of Coeur d'Alene logo and states: 'Your email confirmation code is below.' The code provided is 271357. The email concludes with: 'Please go back to the website and use the code above to confirm your email address. - Thanks City of Coeur d'Alene Portal'.

<https://cdaid.billingdoc.net/login>

Getting Started: Set up a New User – Step 3

The screenshot shows a web browser window with the URL <https://cdaid.billingdoc.net/login>. The page header includes the City of Coeur d'Alene logo and a "Create an Account" button. The main content area features a large logo and a welcome message: "Welcome to the City of Coeur d'Alene Portal. All payments processed after 6:00 PM PST will be credited to the paid on or before the due date will be subject to a penalty." Below this are two buttons: "Create An Account" and "One-Time Payment".

New Users:

Once you have created an account and confirmed your email address, you can log in to the payment portal and link your Utility Account(s). With your account(s) linked you can:

- Sign up for eStatements
- View statement & payment History
- Save credit card & ACH Info
- Sign up for autopay

The login form on the right includes fields for "Email" (with a placeholder "Email Address") and "Password" (with a placeholder "Password 6-30 characters"). There is a "Remember me" checkbox and a "Sign In" button. Below the form are links for "Don't have an account? Create An Account" and "Forgot Password?".

Current branch: -V1.1.0

Link Utility Accounts to User Login – Step 1

The screenshot shows a web browser window with the URL <https://cdaid.billingdoc.net/home>. The page title is "Account Number Dashboard". On the left is a navigation menu with items: Dashboard, Pay My Bill, History, Payment Methods, Settings, and Log Out. The main content area features a large button with a plus sign icon and the text "Add Account Number". A blue arrow points to this button. A callout box on the right contains the following text:

Account Setup:
Now that you've created an account and logged in, you can link your Utility Account(s) to this login.
Simply select 'Add Account Number.'

At the bottom of the page, there is a footer with the text: "City of Coeur d'Alene Portal | finance@cdaid.org | 208-769-2223".

Current branch: V1.1.0

Link Utility Accounts to User Login – Step 2

City of Coeur d'Alene Portal

https://cdaid.billingdoc.net/user_accounts

City of Coeur d'Alene IDAHO

Add New Account Number

Dashboard / Add New Account Number

Fill in the form below to attach a new account.

First 3 characters of the first or last name printed on your paper statement (example: jan)

Statement Name

Account Number

Account Number

Submit Cancel

Location of your account on your paper statement:

Customer Name & Service Address	Account Number	Statement Date	Due Date
JOHN SMITH 123 MAIN ST.	123456-000	1/31/2024	2/15/2024
Services			Total
Previous Balance			92.51
Payments			- 92.51
Water			14.44
Sewer			48.92
Street Lights			3.30
Garbage			21.00
Drainage			3.76
Current Charges			91.42
Total Due			\$91.42

Current branch: V1.1.0

Account Setup:

To link a Utility account, simply enter the first three (3) letters of the first or last name and account number printed on your utility bill. Then click 'Submit.'

Adding multiple accounts?

Repeat this process to add more accounts if necessary. You can link as many accounts as you need.

Add Payment Methods – Step 1

The screenshot shows a web browser window with the URL <https://cdaid.billingdoc.net>. The page title is "City of Coeur d'Alene IDAHO" and the main heading is "Account Number Dashboard". On the left sidebar, the "Payment Methods" option is circled in blue, with a blue arrow pointing from it to a callout box on the right. The callout box, titled "Account Setup:", contains the following text: "You now have a Utility Account linked to your user login. Next you can save a payment method to your account to make payments and set up autopay. Select 'Payment Methods.'". The main content area displays account information for "ACCOUNT NUMBER 999999-000" with a service address of "123 MAIN ST". It lists the account holder as "Name: JOHN SMITH", the "Statement Date: 2024-04-15", and the "Due Date: 2024-04-15". The "Total Due" is "\$100.00". Below this information are four buttons: "View Bill" (blue), "Pay Bill" (green), "Paperless" (green), and "AutoPay" (green). A note at the bottom states: "NOTE: Total amount due is as of your last billing statement and may or may not reflect recent payments, if you have a user account setup please login and see History for additional details." At the bottom left of the page, it says "Current branch: V1.1.0".

Add Payment Methods – Step 2

City of Coeur d'Alene Portal

https://cdaid.billingdoc.net/paymentmethods

City of Coeur d'Alene IDAHO

Payment Methods

Dashboard / Payment Methods

Dashboard

Pay My Bill

History

Payment Methods

Settings

Log Out

Add Payment Method

Payment Methods:

Select 'Add Payment Method'

The debit/credit cards accepted are Visa, Mastercard, Discover, and American Express.

Note: You can save as many payment methods as you need for your account(s).

Current branch: V1.1.0
https://cdaid.billingdoc.net/paymentmethods

City of Coeur d'Alene Portal | finance@cdaid.org | 208-769-2223

Add Payment Methods – 3

The screenshot shows a web browser window with the URL <https://cdaid.billingdoc.net/paymentmethods>. The page title is "Add Payment Method". On the left is a navigation menu with "Payment Methods" selected. The main content area contains a form with the following fields:

- Add Credit Card** (circled in blue) and **Add Check** buttons.
- Description (No Special Characters)**: text input field.
- Credit Card Number**: text input field.
- Type**: dropdown menu with "Visa" selected.
- Name on Credit Card**: text input field.
- Zip Code (Postal Code)**: text input field.
- Expiration Date**: dropdown menu with "January" selected.
- Month: "January" (dropdown)
- Year: "2024" (dropdown)

Payment Methods:
You can save a Credit Card and/or ACH payment information. Enter all of the required information and select '**Save**' at the bottom.
Repeat this process to save more payment methods.

Set Up Autopay – Step 1

The screenshot shows the 'Payment Methods' page in the City of Coeur d'Alene Portal. The left sidebar contains navigation options: Dashboard, Pay My Bill, History, Payment Methods, Settings, and Log Out. The 'Settings' option is circled in blue, with a blue arrow pointing to the 'Payment Methods' page. The main content area shows a list of saved payment methods. One method is visible: a MasterCard with the description 'Brooks Credit', name 'Brooks Ney', and expiration date '02/2027'. There is also an 'Add Payment Method' button with a plus sign icon. A callout box on the right provides instructions on how to make payments and set up autopay.

Make Payments:

Now that you have payment method saved, you can make one-time payments and sign up for Autopay.

Note: You do not need to save a payment method to make a one-time payment.

To make a one-time payment select 'Pay My Bill'.

To set up Autopay select 'Settings'.

Current branch: V1.1.0

City of Coeur d'Alene Portal | finance@cdaid.org | 208-769-2223

Set Up Autopay – Step 2

City of Coeur d'Alene Portal

https://cdaid.billingdoc.net/settings

City of Coeur d'Alene IDAHO

Settings

Dashboard / Settings

Dashboard

Pay My Bill

History

Payment Methods

Settings

Log Out

AutoPay

Paperless

Account

Password

Update your AutoPay settings here: (Must have a Payment Method First).
Accepted credit cards: Visa, MasterCard, Discover and American Express.
Terms: By authorizing this transaction you agree to paying the amount listed. Disputing this service fee transaction will result in losing the ability to pay by credit or debit card.

Account Number	Payment Method	Next Payment	
999999-000	Not set	Not set	+ Add Autopay

City of Coeur d'Alene Portal | finance@cdaid.org | 208-769-2223

Autopay:

To set up automatic recurring payments (also known as 'autopay'), select the [+] box.

Note: You must have at least one saved payment method to set up autopay.

Set Up Autopay – Step 3

Autopay:

Select the day of the month you want payments to come out, select the month that you want autopay to begin, and select the saved payment method that you wish to use for this Utility Account. Then hit 'Save Autopay Plan'.

Note: Once Autopay is set up, payments will automatically come out for the account balance, on the day of the month you that you selected.

Repeat this process to set up additional accounts on Autopay.

Return to the Dashboard

Set Up Paperless Statements – Step 1

The screenshot shows a web browser window with the URL <https://cdaid.billingdoc.net>. The page title is "Account Number Dashboard". The City of Coeur d'Alene logo is in the top left. A sidebar on the left contains navigation links: Dashboard, Pay My Bill, History, Payment Methods, Settings, and Log Out. The main content area displays account information for "ACCOUNT NUMBER 999999-000" and "SERVICE ADDRESS: 123 MAIN ST". Below this, the customer's name is "JOHN SMITH". A table shows the "Statement Date" as 2024-04-15 and the "Total Due" as \$100.00. A blue arrow points from the "Statement Date" column to the "Paperless" button in the action bar. The action bar also includes "View Bill", "Pay Bill", and "AutoPay" buttons. A note at the bottom states: "NOTE: Total amount due is as of your last billing statement and may or may not reflect recent payments, if you have a user a setup please login and see History for additional details." Links for "See Statement History" and "See Payment History" are provided. The footer indicates "Current branch: V1.1.0".

Paperless Statements:

From the 'Dashboard' you can also sign up for eStatement notifications!

Rather than receiving a paper bill in the mail, you can choose to receive an email or text notification when a digital copy of your statement is available to view on the customer portal (cdaid.billingdoc.net).

To get started, select 'Paperless' on the customer dashboard page as shown above.

Set Up Paperless Statements – Step 2

City of Coeur d'Alene Portal

https://cdaid.billingdoc.net/settings#paperless

City of Coeur d'Alene IDAHO

Settings

Dashboard / Settings

Dashboard

Pay My Bill

History

Payment Methods

Settings

Log Out

AutoPay

Paperless

Account

Update your Paperless settings here:

By checking the "Check for Notification" boxes on either email or text notifications you agree to receive notification that your bill is available on this site once you have logged on with your user name and password.

Account Number	Email Notification to bney@valli.com	Text Notification
999999-000	<input type="checkbox"/> Check for Notification	No confirmation number available

Current branch: V1.1.0

City of Coeur d'Alene Portal | finance@cdaid.org | 208-769-2223

Paperless Statements:

To sign up for eStatement notifications simply check the box next to the utility account number you want to set up.

Note: You can set up email notifications for as many utility accounts as you want/need.

Alternatively, you can add a phone number and sign up for text notifications.

If you sign up for email or text notifications, you will no longer receive a paper bill.

Set Up Paperless Statements – Step 3

The screenshot shows a web browser window with the URL <https://cdaid.billingdoc.net>. The page title is "Account Number Dashboard". The City of Coeur d'Alene logo is in the top left. A sidebar on the left contains navigation links: Dashboard, Pay My Bill, History, Payment Methods, Settings, and Log Out. The main content area displays account information for "ACCOUNT NUMBER 999999-000" and "SERVICE ADDRESS: 123 MAIN ST". Below this, there are three columns of information: "Name: JOHN SMITH", "Statement Date:", and "Due Date: 2024-04-15". At the bottom right of this section, it says "Total Due: \$100.00". A row of four buttons is visible: "View Bill" (blue with a magnifying glass icon), "Pay Bill" (green with a refresh icon), "Paperless" (green with a leaf icon), and "AutoPay" (green with a dollar sign icon). A blue arrow points to the "View Bill" button, which is also circled in blue. Below the buttons, there is a "NOTE" section and two links: "See Statement History" and "See Payment History". The footer of the page says "Current branch: V1.1.0".

Paperless Statements:

Once you receive your eStatement notification, log in to your customer portal (cdaid.billingdoc.net), and select 'View Bill' to view your current statement.

The system will prompt you to download a pdf of your statement. You can then view a digital copy your bill and retain for your records, if desired.

Statement & Payment History – Step 1

City of Coeur d'Alene Portal

City of Coeur d'Alene IDAHO

Account Number Dashboard

Dashboard

ACCOUNT NUMBER 999999-000

SERVICE ADDRESS: 123 MAIN ST

Name: JOHN SMITH

Statement Date: 2024-04-15

Due Date: 2024-04-15

Total Due: \$100.00

[View Bill](#) [Pay Bill](#) [Paperless](#) [AutoPay](#)

NOTE: Total amount due is as of your last billing statement and may or may not reflect recent payments, if you have a user account setup please login and see History for additional details.

[See Statement History](#)
[See Payment History](#)

Current branch: V1.1.0

Statement & Payment History:

You can also access past statements, and payment history on the portal!

Select 'Statement History' or 'Payment History'.

Note: If you have multiple utility accounts you can access Statement/Payment History for each account.

Statement & Payment History – Step 2

City of Coeur d'Alene Portal

https://cdaid.billingdoc.net/history#bills

City of Coeur d'Alene IDAHO

History Dashboard / History

Dashboard

Pay My Bill

History

Payment Methods

Settings

Log Out

Statement History

Payment History

Show 10 entries

Search:

Date	Account Number	
2024-03-21	999999-000	Download

Showing 1 to 1 of 1 entries

Previous

Current branch: V1.1.0

City of Coeur d'Alene Portal | finance@cdaid.org | 208-769-2223

Statement History:
On the 'Statement History Tab', customers can download and view past statements.

Statement & Payment History – Step 3

The screenshot shows a web browser window with the URL <https://cdaid.billingdoc.net/history#bills>. The page header includes the City of Coeur d'Alene logo and the text "City of Coeur d'Alene IDAHO". A navigation menu on the left lists "Dashboard", "Pay My Bill", "History", "Payment Methods", "Settings", and "Log Out". The "History" section is active, showing two tabs: "Statement History" and "Payment History". The "Payment History" tab is selected and highlighted with a red underline. Below the tabs, there is a "Show 10 entries" dropdown and a "Search:" input field. A table with the following headers is visible: "#", "Created", "Account Number", "Type", "Total", "Fee Transaction Id", "Balance Transaction Id", and "Mask". The table content is empty, displaying "No data available in table". At the bottom of the table area, it says "0 of 0 entries" and has "Previous" and "Next" navigation links.

Payment History:

On the Payment History Tab, you can review past payments made by Credit Card or eCheck.

(Payments made after 03/21/2024.)

Update Account Info & Add Phone # - Step 1

City of Coeur d'Alene IDAHO

Account Number Dashboard

Dashboard

ACCOUNT NUMBER 999999-000 Edit Nickname

SERVICE ADDRESS: 123 MAIN ST

Name: JOHN SMITH **Statement Date:** **Due Date:** 2024-04-15

Total Due: \$100.00

View Bill Pay Bill Paperless AutoPay

NOTE: Total amount due is as of your last billing statement and may or may not reflect recent payments, if you have a user account setup please login and see History for additional details.

See Statement History
See Payment History

Settings

View & Update Account Info:
To view your Login account info, select 'Settings', and go the 'Account' tab.

Current branch: V1.1.0

Update Account Info & Add Phone # - Step 2

City of Coeur d'Alene Portal

https://cdaid.billingdoc.net/settings

City of Coeur d'Alene IDAHO

AutoPay Paperless **Account** Password

Update your account settings here:

Name

John Smith

NOTE: On email address changes all AutoPay settings as well as Paperless email notification settings will be removed.

Email Address bney@valli.com

OPTIONAL new email address

NOTE: On phone number changes Paperless text notification settings will be removed.

Phone Number (Phone number for text messaging.)

OPTIONAL ###-###-####

Update

Current branch: V1.1.0

View & Update Account Info:

On the 'Account' tab you can update your name and change the email address associated with your account.

You can also add a cell phone number to receive text eStatement notifications.

Make a One-Time Payment – Step 1

The screenshot shows the 'Account Number Dashboard' for user JOHN SMITH. The account number is 999999-000, and the service address is 123 MAIN ST. The dashboard displays the following information:

Name:	Statement Date:	Due Date:
JOHN SMITH		2024-04-15

Total Due:
\$100.00

Below the table, there are four buttons: 'View Bill' (blue), 'Pay Bill' (green), 'Paperless' (green), and 'AutoPay' (green). A note at the bottom states: 'NOTE: Total amount due is as of your last billing statement and may or may not reflect recent payments, if you have a user account setup please login and see History for additional details.' There are also links for 'See Statement History' and 'See Payment History'.

One-Time Payment:
You can make a one-time payment using a credit card or eCheck payment method.
Select 'Pay My Bill' to make a one-time payment.

Current branch: V1.1.0

Make a One-Time Payment – Step 2

City of Coeur d'Alene Portal

https://cdaid.billingdoc.net/billpay

City of Coeur d'Alene IDAHO

Dashboard / Pay My Bill

Pay My Bill

Update amounts if necessary and click Next to review and pay:

Total amount due is as of your last billing statement and may or may not reflect recent payments, if you have a user account setup please login and see History for additional details.

Account Number	Total Due	Want To Pay
999999-000	\$100.00 (Paid \$0.00)	\$ <input type="text" value="100.00"/>

Next →

One-Time Payment:
On the 'Pay My Bill' tab, customers will see their current balance due, for each utility account you have linked to your user login. Simply enter in the amount you wish to pay and select 'Next.'

Note: You can pay towards multiple accounts in the same transaction.

Current branch: V1.1.0

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Make a One-Time Payment – Step 3

City of Coeur d'Alene Portal

https://cdaid.billingdoc.net/billpay_review

City of Coeur d'Alene IDAHO

Pay My Bill

Dashboard / Pay My Bill

Review Amounts, Choose payment method and click Pay to complete transaction:

Account Number	Current Due	Past Due	Total Due	Want To Pay
999999-000	\$100.00	\$0.00	\$100.00 (Paid \$0.00)	\$100.00

Total Amount from Above:	\$100.00
(2.35% Minimum \$2.00) Fee:	\$2.35
Final Total To Pay:	\$102.35

Accepted credit cards: Visa, MasterCard, Discover and American Express.
Terms: By authorizing this transaction you agree to paying the amount listed. Disputing this service fee transaction will result in losing the ability to pay by credit or debit card.

Pay with Credit Card \$ Pay with Check \$ Pay by Card Method

Credit Card Number

Name on Credit Card

Current branch: V1.1.0

One-Time Payment:
Once you have selected the utility account(s) you wish to make a payment for, the system will prompt you to make the payment using a credit card or eCheck.
Simply select a payment type, and enter the required information to make a payment.
You can also pay using a saved payment method, if you have a saved payment method.