Resident Support

Overview & Training

Level 1

About Zego (Powered by PayLease)

Zego is a mobile-centric engagement platform built especially for residential real estate professionals. Our technology removes the friction from most critical resident touch points and automates the dreaded tasks that consume community managers. From payments and utilities, to communications and smart devices, Zego delivers portfolio-wide efficiency, high NOI and more engaged residents.

- Zego Engage
- **Zego Pay**
- Zego Smart
- Zego Utility

Agenda

- Account Lookup
- Navigation
- Submitting One-Time Payments
  - Do's and Don'ts
  - Workflow
- AutoPay Creation
  - Fixed and Variable
- Login Issues
  - Password Reset
- Phone Etiquette
- Call Tracking
  - Escalations After Hours
- Level 1 Certification

Terminology

- Resident - Renter, Homeowner or Student
- Property Management Company (PM) - Oversees residential, commercial or industrial real estate. It typically involves the managing of property that is owned by another party or entity.
- Single-Family - Independent residential structure designed to be used as a single dwelling unit.
- Multi-Family - Multiple separate housing units for residential inhabitants are contained within one building or several buildings within one complex.
- HOA (Homeowners Association) - An organization in a subdivision, planned community or condominium that makes and enforces rules for properties and their Residents.
- eCheck (Electronic Check) / ACH (Automated Clearing House) - An electronic version of a paper check used to make payments online. To make a payment with an eCheck, you need your bank routing and account number.

Account Lookup

Option 1: **Search by the Resident e-mail (username).** Enter the information in the "Residents" field and click on the "Residents" button. One the information is retrieved, verify the First and Last Name, Property and Property Management Company (PM). Click on "Log As" to access account.

Account Lookup

Option 2: **Search by the First and Last Name of the Resident.** Enter the information in the "Residents" field and click on the "Residents" button. One the information is retrieved, verify the First and Last Name, Property and Property Management Company (PM). Click on "Log As" to access account.

*If multiple accounts pull up in your search inquiry, ask the Resident to verify their Property/HOA/Community, the name of their PM or account number. Use Ctrl-F to search keywords.

Search: Zego Test | **Residents** | | **Accounts** | | **Trans** | PMs ▼ | | **PMs**

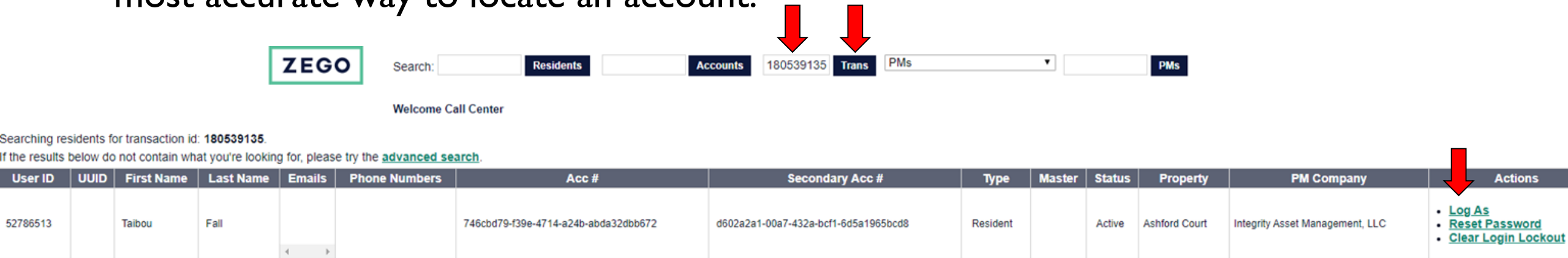**Welcome Kaelin** Admin | Users | Processing | Returns | Invoicing | Reports | Admin Users | Advanced Administration

Searching users for: **Zego Test**.
If the results below do not contain what you're looking for, please try the **advanced search**.

User ID	UUID	First Name	Last Name	Emails	Phone Numbers	Acc #	Secondary Acc #	Type	Master	Status	Property	PM Company	Actions
71961797		Zegozego	Test			0000328477-5ijwAPu8RrqzZ3WNQFQPiMKFmQrfFQjcGb8Wc6Y		Resident		Active	RS Test	HG Fenton Company	• **Log As** • **Block** • **Reset Password** • **Clear Login Lockout**

Account Lookup

Option 3: **Search by Account Number.** Enter the information in the "Accounts" field and click on the "Accounts" button. One the information is retrieved, verify the First and Last Name, Property and Property Management Company (PM). Click on "Log As" to access account.

*If multiple accounts pull up in your search inquiry, ask the Resident to verify the First and Last Name, Property/HOA/Community, the name of their PM. Use Ctrl-F to search keywords.

*Account numbers are generated by the PM, not Zego. There may be multiple Residents in the database with the same Account Numbers.

Account Lookup

Option 4: **Search by Transaction Number.** Enter the Transaction (Confirmation) Number in the "Trans" field and click on the "Trans" button. One the information is retrieved, verify the First and Last Name, Property and Property Management Company (PM). Click on "Log As" to access account.

*If a Resident mentions that they have already made a payment, this is the fastest and most accurate way to locate an account.

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Account Overview – Home Tab

Account Overview – Home Tab

Account Number Example:

Home   One-Time Payment   Recurring Payment   **Pay**

Property: Finisterra Community Association

Property Management Co: Associated Asset Management AAM (VMS)

Manage Accounts

Account Number: 1145803   Association: Finisterra Commur

Not all Zego accounts will have an account number. If the resident has an account number it will show under the Property Management Co name.

Locked Payment Field Example:

Make a Payment Now

Total Amount Due: $35.00 ⑦

Payment Amount: $ 35.00

☐ Build your credit history by opting in to Credit Reporting. Learn The Benefits

Make One-Time Payment

Locked payment field

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Account Overview - Payment History

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Account Overview - My Payment Accounts

- We are able to see all the bank accounts and debit/credit cards the resident has used here, unless they have manually deleted one of these methods.

- We are also able to add/delete payments here.

Home   One-Time Payment   Recurring Payment   Payment History   **My Payment Accounts**   My Profile   Support Center

Property: RS Test
Property Management Co: HG Fenton Company

My Payment Accounts

Manage Bank Accounts

Add Bank Account

Bank Name	Name on Account	Account #	Routing #	Type	
Test	Test	#2345	021000021	Savings	Delete

Manage Card Accounts

Add Card

	Cardholder	Card Number	Expiration	Card Type	
VISA	Tabitha Tabron	#9883	1/22	Credit	Delete

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Login Issues - Password Reset

- If the Resident is having trouble accessing the account online, check the Client Notes to see if we can send them a PW reset.
- If the Resident CAN login through Zego, we can send them a PW reset.
- If the Resident is required to login through the PMs web portal, we cannot send them a pw rest. They will need to contact their PM/Property/On-site Manager for assistance.

-DO NOT REGISTER OR ADD NEW RESIDENTS for this PM Company.
-ONLY accept payments for residents who are ALREADY registered in the system (i.e., you can add their email address and reset the password).

-Search by resident account number. If no result, search by name.
-If resident is not in the system, please refer them to their management company to request they be added as an eligible resident. We are unable to add residents.

-You CAN register resident over the phone.
-If resident is already in the system you CAN take phone payment if they are not you CAN add them and then take phone payment.

-You CAN register resident over the phone.
-If resident is already in the system you CAN take phone payment if they are not you CAN add them and then take phone payment.
Residents log in through SenEarthCo Portal - Login Information comes from Management Company (NOT PAYLEASE)

Login Issues - Password Reset

Client Notes:

- ## CINC Integration

-DO NOT ADD NEW RESIDENTS for this PM Company.
-DO NOT TAKE PHONE PAYMENTS. If they are looking to make a phone payment please direct the resident to contact their management company as the manager take phone payments in house.
-If the resident has questions please refer them to the Management Company

Residents log in through CINC Portal - Login Information comes from Management Company (NOT PAYLEASE)

- ## On-Site

-DO NOT REGISTER OR ADD NEW RESIDENTS for this PM Company.
-DO NOT SEND PASSWORD RESET TO ANYONE

- If resident is having registration issues through the portal on their website but are in the PayLease system have them call On-Site customer support at (866) 266-7483 option 2, then option 1, followed by #.
- Residents login via OnSite's Resident Passport. They do not use PayLease's portal.

-ONLY accept payments for residents who are ALREADY registered in the system
- Search by resident account number. If no result, search by name.
-If resident is not in the system, please refer them to their management company to request they be added as an eligible resident. We are unable to add residents.

ZE GO

Login Issues - Password Reset

Client Notes:

- Resman

-DO NOT TAKE PHONE PAYMENTS FOR RESIDENTS
-DO NOT REGISTER RESIDENTS FOR THIS PROPERTY MANAGEMENT COMPANY
- All Transactions will need to be made on the Property Management Companies Website through the ResMan Portal (NOT PAYLEASE)
-If the resident has questions please refer them to the onsite Management office/contact

- Rent Manager

-DO NOT TAKE PHONE PAYMENTS FOR RESIDENTS
-DO NOT REGISTER RESIDENTS FOR THIS PROPERTY MANAGEMENT COMPANY
- All Transactions will need to be made on the Property Management Companies Website through the Resident Web Access Portal (NOT PAYLEASE)
-If the resident has questions please refer them to the Management Company

Login Issues - Password Reset
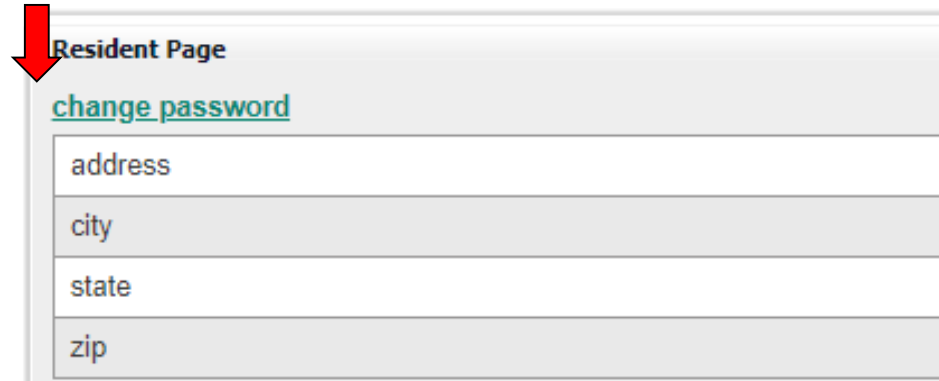
Instructions:

- Once you have located the correct account, verify the First and Last Name, Property, Property Management Company and Account Number (if applicable).
- To send a PW reset, confirm in Client Notes we can register the resident and then add/verify the email address in the "Username" field located under the "My Profile" tab.
- Click on "Admin"
- Select "Change Password"
- A new tab will open on your browser. Use the "Request Password Reset" button to send a link to the email address on file.
- Direct the Resident to Login online at www.gozego.com

Login Issues - Password Reset

DEMO

Account Overview - My Profile

Home   One-Time Payment   Recurring Payment   Payment History   My Payment Accounts   **My Profile**   Support Center

Property: RS Test
Property Management Co: HG Fenton Company

My Profile

Resident Details

Select edit to add their email address. → Edit

First Name:	Zegozego	Last Name:	Test
Unit:		Phone:	
Email/Username:			

Need Help?

Click here for Support

Resident's email can be saved here for account notifications and for registration.

Account Overview - My Profile

If the following error message appears, this means the email address is already registered to another account.

Email entered is already in the system

Resident Details

First Name: *	Zegozego	Last Name: *	Test
Unit:		Phone:	
Email/Username: *		⑦	

Email entered is already in the system

Fields marked with an asterisk (*) are required.

Cancel   Save

If you search the email address you can locate the account the email address is registered to.

ZEGO   Search: zegotest@goz [Residents] [Accounts] [Trans] PMs ▾ [PMs]

Welcome Kaitlyn   Admin | Users | Processing | Returns | Invoicing | Reports | Admin Users | Advanced Administration

Searching users for: **zegotest@gozego.com**.
If the results below do not contain what you're looking for, please try the **advanced search**.

User ID	UUID	First Name	Last Name	Emails	Phone Numbers	Acc #	Secondary Acc #	Type	Master	Status	Property	PM Company	Actions
71961797		Zegozego	Test	zegotest@gozego.com		0000328477-5ijwAPu8RrqzZ3WNQFQPiMKFmQrfFQjcGb8Wc6Y		Resident		Active	RS Test	HG Fenton Company	• Log As • Block • Reset Password • Clear Login Lockout

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Account Overview - My Profile

Once you have logged as the account with the email saved, go under My Profile and select edit under Resident Detail and put "xxx" after the email address and select Save.

The next step will be to log as the original account you had pulled up and add the email to the account.

DEMO

Account Overview - My Profile

Password   Change Password

Current Password: ••••••••

The resident will be able to change their current password here.

Payment Reminders   Edit

Payment Reminders have not been set up. Please click the Edit button to sign up.

The resident can opt into email/text reminders here. Residents might call in confused about these reminders because they are coming from Zego and not their property management company.

Credit Reporting   Edit

Credit Reporting is currently disabled. To enable, click edit and complete the form.

Residents can opt in/out of credit reporting here. If the resident is already opted in the fields will be filled in with their information. Zego is able to opt residents out of credit reporting but we can not opt the resident in.

Property Details   Delete Account   Change Property/Management Company

Property: RS Test, Test, AL, 12345

Property Management Company: HG Fenton Company

Only the resident can select these options! If the resident asks how they can delete their account you can instruct them to go here.

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Submitting Payments - Do's and Don'ts

BEFORE getting started there are a few things to remember:

- Always read Client Notes BEFORE taking a payment or making any changes to the account.
- Always confirm First and Last Name, Property and Property Management Company BEFORE taking any action on an account.
- DO NOT include commas when entering a payment amount.
- Always confirm Service Fees and Processing Times when submitting or scheduling a payment.
- Always read back banking or credit card information to ensure that no mistakes/typos were made.
- Always read NSF Disclaimer before submitting an ACH/eCheck payment.
- We do not accept payments from foreign bank accounts, only domestic. However, Residents can pay with a foreign credit card (plastic).
- Only one payment method can be used per transaction.
- DO NOT check the box to Opt-In to Credit Reporting for over the phone payments. We DO NOT opt Residents in to Credit Reporting over the phone.
- A debit card number is not the same as a bank account number.

Submitting One-Time Payments - Workflow

Step 1: Confirm Payment Amount

- Once the correct account has been located, check the Client Notes to confirm whether or not the PM accepts payments over the phone.
- Enter the payment amount that the Resident wishes to pay in the appropriate payment field and click "Make One Time Payment."
- *Balance information is populated/updated by the PM. Zego cannot confirm if the payment amount shown on the account is accurate. If the Resident would like to verify their account balance they will need to contact their PM.
- *If the balance is locked the Resident will need to contact their PM to request that the payment amount be adjusted if it's different than what the Resident wishes to pay.

Submitting One-Time Payments - Workflow

Step 2: Select a Payment Account

- Any previously used payment methods will be saved on the account.
- Select the payment method that the Resident would like to use and click "Continue."
- If the Resident does not want to use an existing payment method, select the appropriate payment type and click "Continue" to enter the payment information.
- *Payment options available to the Resident vary between properties and PMs.
- *ALWAYS disclose service fees and processing times associated with each payment method.

Submitting One-Time Payments - Workflow

Processing Times & Service Fees

- Standard Processing time is three full business days. The funds will post to the PMs account at the end of the third business day.
- Express Pay Processing time is one full business day. The funds will post to the PMs account within 24 hours.
- Weekends and holidays are NOT considered business days.
- Zego cannot advise Residents whether or not their payment will be considered late and we do not assess late fees.
- All service fees are assessed on a per-transaction basis and cannot be waived or refunded.
- Credit or Debit Card (plastic) service fee is percentage based, typically 3.5% of the payment amount.
- eCheck/ACH service fee is a flat rate, typically the cheaper option.
- Express Pay Processing is an additional $14.95 unless it's included (i.e. the account defaults to Express Pay 1 day).
- Phone fee is an additional $9.95
- Service fees are typically cheaper online, rather than paying by phone.
- Residents are not required to pay through our service. There are other options available to them - see PM!

Submitting One-Time Payments - Workflow

Step 3: Enter Payment Information

- If the Resident uses a payment method that is already on file, skip to step 4.
- Fill out the appropriate fields according to the payment method selected. Click "Continue."

Submitting One-Time Payments - Workflow

Step 4: Review & Submit

- Review all information before submitting the payment.
- Example: "To review, today you are submitting a one-time payment for the 4540 Florida St. property in care of Mynd Management. The total with the service fee included is $1004.95. This payment will be processed from the bank account ending in 8901. In the event that your payment is returned by your bank for Insufficient Funds (NSF), Zego will assess and process an automatic $25 NSF fee to the same account from which this payment was initiated."
- Once the Resident confirms all information is correct, click "Submit Payment."
- *MUST read NSF disclaimer for eCheck/ACH transactions ONLY.

Property: 4540 Florida St

Property Management Co: Mynd Management

① Amount   ② Account   ③ Review   ④ Receipt

I, ▮▮▮▮▮, confirm that the payment information below is correct and authorize Zego on 03-24-2020 to debit the account below for $1,004.95.

Previous   **Submit Payment**

Payment Amount		Edit
Lease payment:		$1000.00
Fee:		$4.95
Total:		$1004.95

Payment Account		Edit
Bank Name:		Chase
Account Number:		#8901
Routing Number:		322271627
Name on Account:		Kaelin McCormick

Payment Recipient			
Property/Community:	4540 Florida St	City:	San Diego
State:	CA	Zip Code:	92116

- Once the payment begins processing, a refund can only be authorized through your management company.
- Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.
- E-check Transactions: In the event that my bank returns this transaction for Insufficient Funds (NSF), I authorize Zego to assess and process an automatic $25.00 NSF Fee to the same account from which this payment was initiated.
- By clicking Submit you agree to our latest Terms of Use.

Submitting One-Time Payments - Workflow

Confirmation

- Provide the Transaction Number (Confirmation) to the Resident.
- The Resident will automatically be sent a copy of the receipt to the email address on file.
- *Only credit and debit cards are declined up front. If the payment does not go through, advise the Resident to contact their card issuer.

Your payment has been processed.	

Is This a Recurring Payment?

Save time when paying
Set up an AutoPay   **Get Started**   OR   Get reminded via text or email
Set Up Payment Reminders   **Enable**

① Amount   ② Account   ③ Review   ④ Receipt

Print Receipt

Payment Receipt

Transaction #:	29377057
Transaction Status:	Processing
Resident Name:	Testtheawesometest lasttest
Payment Made By:	Testtheawesometest lasttest
Transaction Date:	Mar 27 2020 9:27 AM PDT
Payment Amount:	Lease payment: $1,000.00
	Processing Fee: $44.95
	Total $1,044.95
Payment Account:	Mastercard (Credit) - #0003
Property:	Test Property 1, San Diego, CA, 92121
Unit:	
Property Management Co:	TransUnion

R01 (NSF) Returned Transactions

- An NSF fee is incurred when a transaction (e-check only) is returned from the bank for insufficient funds.
- Example of a R01 returned transaction on a resident's account:

Recent Payment History

Trans #	Date	Amount	Status
144818981	Apr 12 19	$57.15	Returned: R01 (NSF)
144729875	Apr 11 19	$48.27	Paid Out

- Once the bank provides Zego with the R01 return code, we will charge an automatic $25 NSF fee to the same bank account used for the payment.
- If Zego's first attempt of the $25 fee is also returned by their bank, Zego will attempt one more time to receive the $25 fee. After the second attempt, Zego will no longer attempt to receive the $25 fee.

R01 (NSF) Returned Transactions

- Once the payment begins processing, a refund can only be authorized through your management company.

- Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.

- E-check Transactions: In the event that my bank returns this transaction for Insufficient Funds (NSF), I authorize Zego to assess and process an automatic $25.00 NSF Fee to the same account from which this payment was initiated.

- By clicking Submit you agree to our latest Terms of Use.

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AutoPay Creation

- AutoPay is a fast and convenient way to pay your bills. Funds are automatically transferred to your management company using the payment account of your choice.
- There are two types of AutoPays: Variable (VAP) and Fixed Amount (FAP).
- Variable and Fixed Amount AutoPays follow the same steps for set up.
- Not all PMs/properties offer both options to Residents:
  - Both
  - VAP or FAP
  - Neither

Variable AutoPay	Fixed Amount AutoPay
Select this option if the amount you pay changes every month.	Select this option if the amount you pay is the same every month.
Create Variable AutoPay	**Create Fixed AutoPay**

ZE GO

AutoPay Creation - Fixed Amount

Step 1: Locate Resident's account & review auto pay options

- Verify First and Last Name, Property and Property Management Company.
- Fixed Amount AutoPays (FAP) will only process payments for the set amount and will not self-adjust, meaning that the payment amount will need to be manually updated (before the date of processing) is the payment amount fluctuates month to month.
- Click on the "Recurring Payment" or "AutoPay" tab.
- Select "Create New AutoPay." The account may default to a FAP, a VAP or the Resident may have either as an option.

AutoPay Creation - Fixed Amount

Step 2: Confirm Payment Amount

- Enter the fixed dollar amount that the Resident wishes to pay in the appropriate payment field and click "Continue."
- *Balance information is populated/updated by the PM. Zego cannot confirm if the payment amount shown on the account is accurate. If the Resident would like to verify what is due on a monthly/quarterly/bi-annually/yearly basis they will need to contact their PM.
- *If the balance is locked the Resident will need to contact their PM to request that the payment amount be adjusted if it's different than what the Resident wishes to pay.

AutoPay Creation - Fixed Amount

Step 3: Schedule Payments

- Select the Payment Start Date. This will be the date of the first payment and the date that all payments will be processed.
- Select the Payment Frequency - Monthly/Quarterly/Bi-Annually/Yearly
- If the Resident would like to set an end date, un-check the "Indefinite" box and select a Final Payment Month/Year.
  - Example: If the Resident would like the last payment to be processed in December of this year, you would set the Final Payment Month/Year to 12/2020. After their last payment is processed in December, their autopay will expire (cancel).

Payment Start Date: *   04/01/2020   📅 ❓

Payment Frequency: *   Monthly ▾

Final Payment Month/Year: *   ☐ Indefinite

                               12/2020   📅 ❓

Fields marked with an asterisk (*) are required.

Previous   Continue

AutoPay Creation - Fixed Amount

Step 4: Select Payment Account

- Any previously used payment methods will be saved on the account.
- Select the payment method that the Resident would like to use and click "Continue."
- If the Resident does not want to use an existing payment method, select the appropriate payment type and click "Continue" to enter the payment information.
- *Payment options available to the Resident vary between properties and PMs.
- *ALWAYS disclose service fees and processing times associated with each payment method.
- *ALWAYS read back the payment information to the Resident to ensure that no errors were made.

AutoPay Creation - Fixed Amount

Step 5: Review & Schedule AutoPay

- Review all information before scheduling the AutoPay.
- Example: "To recap, you are setting up an auto pay for the Hawthorne property in care of JL Woode Management. Starting April 1st, your bank account ending in 9130 will be debited on a monthly basis in the amount of $1000. Your final payment will run on Dec. 1st, then your autopay will expire. Correct?"
- If the autopay is linked to a bank account (eCheck/ACH), remember to read the NSF disclaimer to the Resident.
- Once you click "Schedule AutoPay" the Resident will receive an email confirmation to the address on file.

Property: Hawthorne House Apartments 1712
Property Management Co: JL Woode Management Company
Manage Accounts

Account Number: t0005440 Association: **Hawthorne House Apartments**

① Amount   ② Schedule   ③ Account   ④ Review

I, Ross Bergman, confirm that the payment information below is correct and authorize Zego on 03-25-2020 to set up the AutoPay (automatic recurring payment) with the details below. I understand I am responsible for canceling my AutoPay when I am moving from my Property.

[Previous] [Schedule AutoPay]

Payment Amount	Edit
Payment amount:	$1000.00
Total:	$1000.00

Payment Account	Edit
Bank Name:	Ameriprise FSB
Account Number:	#9130
Routing Number:	091071611
Name on Account:	Ross Bergman

Payment Schedule			Edit
Payment Start Date:	04/01/2020	Payment End Date:	12/01/2020
Payment Frequency:	Monthly		

Payment Recipient			
Property/Community:	Hawthorne House Apartments	City:	Chicago
State:	IL	Zip Code:	60657

- Once the payment begins processing, a refund can only be authorized through your management company.
- Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.
- E-check Transactions: In the event that my bank returns this transaction for Insufficient Funds (NSF), I authorize Zego to assess and process an automatic $25.00 NSF Fee to the same account from which this payment was initiated.
- By clicking Submit you agree to our latest Terms of Use.

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AutoPay Creation: Variable

Step 1: Locate Resident's account & review auto pay options

- Verify First and Last Name, Property and Property Management Company.
- Residents will be charged the full amount billed, or the balance populated on their account by the Property Management Company.
- This is a great option for Residents if their payment amount fluctuates.
- Residents to not set the payment amount to be debited.
- Click on the "Recurring Payment" or "AutoPay" tab.
- Select "Create New AutoPay." The account may default to a FAP, a VAP or the Resident may have either as an option.

AutoPay Creation: Variable

Step 2: Schedule Payments

- Select the Payment Start Date. This will be the date of the first payment and the date that all payments will be processed. Note date restrictions!
- Select the Payment Frequency - Monthly/Quarterly/Bi-Annually/Yearly
- If the Resident would like to set an end date, un-check the "Indefinite" box and select a Final Payment Month/Year.
  - Example: If the Resident would like the last payment to be processed in December of this year, you would set the Final Payment Month/Year to 12/2020. After their last payment is processed in December, their autopay will expire (cancel).
- A Resident can set a Maximum Limit on their VAP, but it is not required. If the payment amount exceeds the max limit, then the payment will not process. The Resident has up to 48 hours to manually approve the payment to go through.

Payment Start Date: * 04/02/2020

Payment Frequency: * Monthly ▼

Final Payment Month/Year: * ☑ Indefinite

Maximum Limit ☑ ...like to set a Maximum Limit ⑦

$ 2000

AutoPay Creation - Variable

Step 3: Select Payment Account

- Any previously used payment methods will be saved on the account.
- Select the payment method that the Resident would like to use and click "Continue."
- If the Resident does not want to use an existing payment method, select the appropriate payment type and click "Continue" to enter the payment information.
- *Payment options available to the Resident vary between properties and PMs.
- *ALWAYS disclose service fees and processing times associated with each payment method.
- *ALWAYS read back the payment information to the Resident to ensure that no errors were made.

AutoPay Creation - Variable

Step 4: Review & Schedule AutoPay

- Review all information before scheduling the AutoPay.
- Example: "To recap, you are setting up an auto pay for the Hawthorne property in care of JL Woode Management. Starting April 1st, your bank account ending in 9130 will be debited on a monthly basis. Your final payment will run on Dec. 1st, then your autopay will expire. Correct?"
- If the autopay is linked to a bank account (eCheck/ACH), remember to read the NSF disclaimer to the Resident.
- Once you click "Schedule AutoPay" the Resident will receive an email confirmation to the address on file.

Property: Hawthorne House Apartments 1712
Property Management Co: JL Woode Management Company
Manage Accounts

Account Number: t0005440 Association: **Hawthorne House Apartments**

① Amount   ② Schedule   ③ Account   ④ Review

I, Ross Bergman, confirm that the payment information below is correct and authorize Zego on 03-25-2020 to set up the AutoPay (automatic recurring payment) with the details below. I understand I am responsible for canceling my AutoPay when I am moving from my Property.

Previous   **Schedule AutoPay**

Payment Amount	Edit
Payment amount:	$1000.00
Total:	$1000.00

Payment Account	Edit
Bank Name:	Ameriprise FSB
Account Number:	#9130
Routing Number:	091071611
Name on Account:	Ross Bergman

Payment Schedule			Edit
Payment Start Date:	04/01/2020	Payment End Date:	12/01/2020
Payment Frequency:	Monthly		

Payment Recipient			
Property/Community:	Hawthorne House Apartments	City:	Chicago
State:	IL	Zip Code:	60657

- Once the payment begins processing, a refund can only be authorized through your management company.
- Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.
- E-check Transactions: In the event that my bank returns this transaction for Insufficient Funds (NSF), I authorize Zego to assess and process an automatic $25.00 NSF Fee to the same account from which this payment was initiated.
- By clicking Submit you agree to our latest Terms of Use.

DEMO

AutoPay Creation

- To view active, expired or cancelled autopays, click on "Admin" in the ResUI, then select "AutoPay."
- Residents can only edit the payment method and payment amount on an existing autopay.

View Auto Pays

Fixed AutoPays:

Transaction ID	Auto Pay Creator	Creator's ID	PM Company	Creator's User Level	Payment Type	IP Created From	Transaction Date and Time	Status	Skipped	Start Date	End Date	Day of Month	Frequency
76144282	Ross Bergman	28269631	JL Woode Management Company	Resident	online	98.220.83.67	2016-12-30 10:06:49	Inactive	No	2017-02-01	2017-02-01	1	Annually
68435607	Ross Bergman	28269631	JL Woode Management Company	Resident	online	98.220.83.67	2016-09-01 08:31:17	Inactive	No	2016-10-01	2017-01-01	1	Monthly

Variable AutoPays:

AutoPay ID	Auto Pay Creator	Creator's ID	PM Company	Creator's User Level	Payment Type	IP Created From	AutoPay Date and Time	Status	Skipped	Start Date	End Date	Day of Month	Frequency
86776	Ross Bergman	28269631	JL Woode Management Company	Resident	online	67.173.52.204	2017-12-28 06:44:23	Active	No	2018-01-05 00:00:00	Indefinite	5	Monthly
49638	Ross Bergman	28269631	JL Woode Management Company	Resident	online	67.173.52.204	2017-05-03 09:38:22	Cancelled	No	2017-06-02 00:00:00	Indefinite	2	Monthly
48506	Ross Bergman	28269631	JL Woode Management Company	Resident	online	73.8.0.73	2017-04-28 14:16:50	Cancelled	No	2017-05-02 00:00:00	Indefinite	2	Monthly

Account Overview - Recurring Payment

Home   One-Time Payment   **Recurring Payment**   Payment History   My Payment Accounts   My Profile
Support Center

Property: RS Test

Property Management Co: HG Fenton Company

AUTOPAY

Create New AutoPay

Fixed Amount AutoPay

Status	Start Date	End Date	Debit Day	Frequency	Account	Amount			
Active	Mar 2020	Indefinite	28	Monthly	VISA 9883	$102.65	Skip	Edit	Cancel

Home

Recent Payment History

Trans #	Date	Amount	Status
176857730	Feb 14 20	$3.08	Paid Out

View All Payments

Active AutoPays

Amount	Account	Debit Day	Freq
$102.65	VISA #9883	28	Monthly

View AutoPays

Please note, the AutoPay will also show as active on the home tab.

AutoPay details found here.

This option will skip their next scheduled payment. In this case it will skip the payment on 03/28/20 and resume on 04/28/20.

This option will cancel the AutoPay.

The edit option will allow you to change the payment method or amount. The date of the AutoPay can only be changed by canceling this AutoPay and creating a new AutoPay.

ZEGO

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DEMO

Phone Etiquette

Opening a call:

- "Thank you for contacting Zego (Powered by PayLease), would you like to make a payment today?"

Transferring a call:

- "Please remain on the line. I'm going to transfer you to a Level 2 Support Representative that will be able to assist you with this issue."

Closing a call:

- "Is there anything else that I can assist you with today?"
- "Thank you again for calling Zego, we hope you have a wonderful day."

Escalations After Hours

Please include the following:

- Date & Time
- Agent Identifier
- First and Last Name of Caller/Resident
- Property Management Company
- Property, Community or Association
- Account Number
- Transaction Number
- Contact Information
  - Email
  - Phone Number
- Reason for calling / Any details given by the caller

Logging Calls

- https://gozego.force.com/residents/s/contactsupport

ZEGO

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