



Powered by
PayLease

Resident Support

Overview & Training

Level I



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 I 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. Once the information is retrieved, verify the First and Last Name, Property and Property Management Company (PM). Click on “Log As” to access account.

ZEGO Search: **Residents** **Accounts** **Trans** **PMs**

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

Searching users for: **pltest@paylease.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
21639018		PayLease	TEST	pltest@paylease.com	858-111-2222	AMEX TEST		Resident		Active	PayLease TEST	CRAGER-BARTELS L L C	<ul style="list-style-type: none">• Log As• Block• Reset Password• Clear Login Lockout

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. Once 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:

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			0000328477-5ijwAPu8RrqzZ3WNQFQPiMKFmQrFQjcGb8Wc6Y		Resident		Active	RS Test	HG Fenton Company	<ul style="list-style-type: none">Log AsBlockReset PasswordClear Login Lockout



Account Lookup

Option 3: Search by Account Number. Enter the information in the “Accounts” field and click on the “Accounts” button. Once 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.

Search: Residents Accounts Trans PMs

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

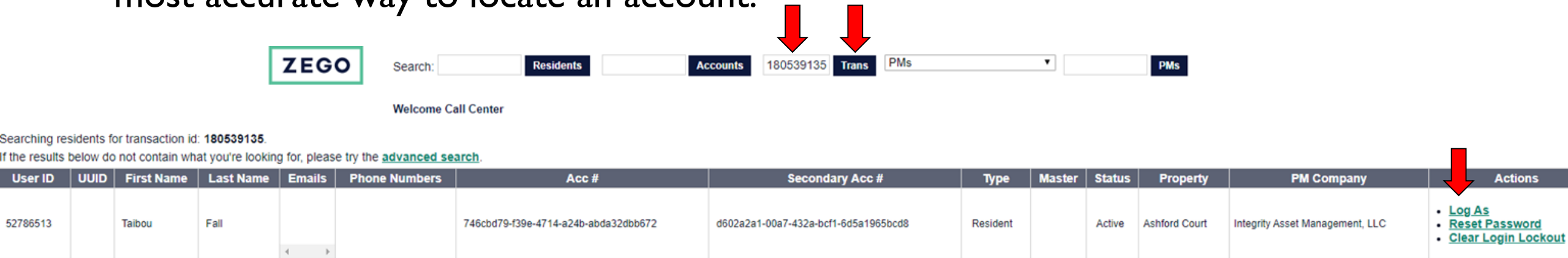
Searching accounts for: 1036001301.
If the results below do not contain what you're looking for, please try the [advanced search](#).

User ID	UUID	First Name	Last Name	Emails	Phone Numbers	Acc #	Secondary Acc #	Type	Master	Status	Property	PM Company	Actions
58419717		Ming	Lau			1036001301		Resident		Active	Doolittle Marina Condominium Homeowners Association Unit II	Bay Area Property Services	<ul style="list-style-type: none">Log AsBlockReset PasswordClear Login Lockout

Account Lookup

Option 4: Search by Transaction Number. Enter the Transaction (Confirmation) Number in the “Trans” field and click on the “Trans” button. Once 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.



The screenshot shows the ZEGO search interface. At the top, there is a search bar with the ZEGO logo on the left. The search bar contains the text "Search:" followed by four buttons: "Residents", "Accounts", "Trans", and "PMs". The "Trans" button is highlighted in blue and has a red arrow pointing down to it. The "Accounts" button is also highlighted in blue. The search results are displayed in a table below the search bar. The table has the following columns: User ID, UUID, First Name, Last Name, Emails, Phone Numbers, Acc #, Secondary Acc #, Type, Master, Status, Property, PM Company, and Actions. The first row of the table shows the following data: User ID: 52786513, UUID: (empty), First Name: Taibou, Last Name: Fall, Emails: (empty), Phone Numbers: (empty), Acc #: 746cbd79-f39e-4714-a24b-abda32dbb672, Secondary Acc #: d602a2a1-00a7-432a-bcf1-6d5a1965bcd8, Type: Resident, Master: (empty), Status: Active, Property: Ashford Court, PM Company: Integrity Asset Management, LLC, and Actions: Log As, Reset Password, Clear Login Lockout. A red arrow points down to the "Log As" button in the Actions column.

Search: Residents Accounts 180539135 Trans PMs PMs

Welcome Call Center

Searching residents for transaction id: **180539135**.
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
52786513		Taibou	Fall			746cbd79-f39e-4714-a24b-abda32dbb672	d602a2a1-00a7-432a-bcf1-6d5a1965bcd8	Resident		Active	Ashford Court	Integrity Asset Management, LLC	<ul style="list-style-type: none">Log AsReset PasswordClear Login Lockout

DEMO

Account Overview – Home Tab

ZEGO

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

Property: RS Test

The Property name can be under the name of the apartments (renter), association/community (homeowner), or in the rare case the property address.

Property Management Co: HG Fenton Company

Home

The Property Management Company will be the company overlooking the property name shown above.

Make a Payment Now

Lease Payment: \$
As of: 02/14/2020

Security Deposit: \$

Application Fee: \$

Amount Owed: \$

Payment Amount: \$

These payment fields are editable and you can manually enter amounts in each field.

Build your credit history by opting in to Credit Reporting. [Learn The Benefits](#)

Make One-Time Payment

Recent Payment History

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

This button will take you to the Payment History tab.

View All Payments

Active AutoPays

Amount	Account	Debit Day	Freq
Click here to set up a new AutoPay.			

This option will only appear when the resident has the option to opt into credit reporting. Only the resident can opt into credit reporting, Zego can not opt in resident.

Want to set up automatic payments?

Schedule an AutoPay at the frequency of your choice.

Get Started

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 ?

Payment Amount: \$

Build your credit history by reporting in to Credit Reporting. [Learn The Benefits](#)

Make One-Time Payment

Locked payment field

DEMO

Account Overview - Payment History

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

Property: Finisterra Community Association
 Property Management Co: Associated Asset Management AAM (VMS) **Payment History**

[Manage Accounts](#)

Account Number: 1145803 Association: Finisterra Community Association

Start Date: 02/26/2019 End Date: 03/26/2020 **Submit**

Expand All Rows

Trans #	Status	Date	Bill Type	Amount	Account	
169623124	Paid Out	Dec 10 19	Payment amount	\$105.00	Checking - #1977	Details
166498647	Paid Out	Nov 10 19	Payment amount	\$105.00	Checking - #1977	Details
163355812	Paid Out	Oct 10 19	Payment amount	\$105.00	Checking - #1977	Details
160113151	Paid Out	Sep 10 19	Payment amount	\$105.00	Checking - #1977	Details
157004850	Paid Out	Aug 10 19	Payment amount	\$105.00	Checking - #1977	Details
153761496	Paid Out	Jul 10 19	Payment amount	\$105.00	Checking - #1977	Details
150549783	Paid Out	Jun 10 19	Payment amount	\$105.00	Checking - #1977	Details
147599688	Paid Out	May 10 19	Payment amount	\$105.00	Checking - #1977	Details
144612317	Paid Out	Apr 10 19	Payment amount	\$105.00	Checking - #1977	Details
141546029	Paid Out	Mar 10 19	Payment amount	\$105.00	Checking - #1977	Details

This option will allow you to see transactions before 02/26/2019

[Manage Accounts](#)

Account Number: 1145803 Association:

Start Date: 12/01/2018 **Submit** **Expand All Rows**

December, 2018

Mo	Tu	We	Th	Fr	Sa	Su
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today Clear date

Trans #	Status	Date	Amount	Account	
169623124	Paid Out	Dec 10 19	\$105.00	Checking - #1977	Details
166498647	Paid Out	Nov 10 19	\$105.00	Checking - #1977	Details
163355812	Paid Out	Oct 10 19	\$105.00	Checking - #1977	Details
160113151	Paid Out	Sep 10 19	\$105.00	Checking - #1977	Details
157004850	Paid Out	Aug 10 19	\$105.00	Checking - #1977	Details
153761496	Paid Out	Jul 10 19	\$105.00	Checking - #1977	Details
150549783	Paid Out	Jun 10 19	\$105.00	Checking - #1977	Details
147599688	Paid Out	May 10 19	\$105.00	Checking - #1977	Details
144612317	Paid Out	Apr 10 19	\$105.00	Checking - #1977	Details
141546029	Paid Out	Mar 10 19	\$105.00	Checking - #1977	Details
138639770	Paid Out	Feb 10 19	\$105.00	Checking - #1977	Details
135622317	Paid Out	Jan 10 19	\$105.00	Checking - #1977	Details
132660192	Paid Out	Dec 10 18	\$105.00	Checking - #1977	Details



DEMO

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	
 Tabitha Tabron	#9883	1/22	Credit	Delete



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.

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-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.

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

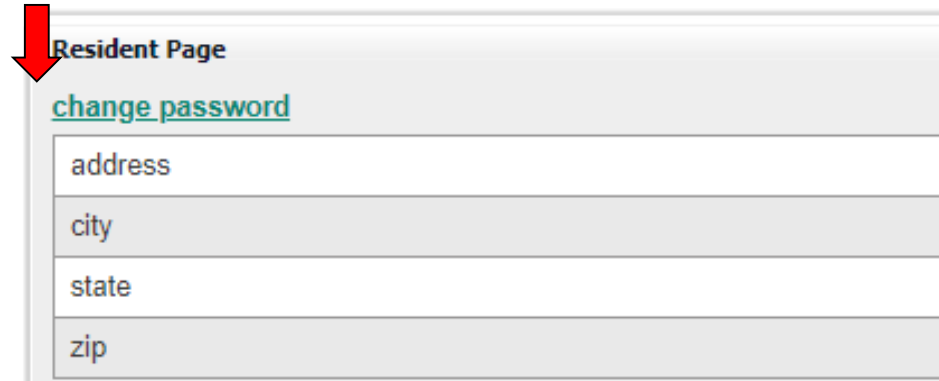
Instructions:

- 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

The screenshot shows the ZEGO user interface. At the top right, there is a 'Welcome:' message followed by a redacted name and two buttons: 'Admin' and 'Logout'. A red arrow points down to the 'Admin' button. Below this is a navigation bar with the ZEGO logo and links for 'Home', 'Make Payment', 'AutoPay', 'Payment History', 'My Payment Accounts', 'My Profile', and 'Support Center'. A red arrow points down to the 'My Profile' link. The main content area shows property information: 'Property: 4540 Florida St' and 'Property Management Co: Mynd Management'. A 'My Profile' tab is active. A green banner states 'Profile details have been successfully updated.' Below this is a 'Resident Details' section with an 'Edit' button. A red arrow points up to the 'Edit' button. The details include: 'First Name: [redacted]', 'Last Name: [redacted]', 'Unit:', 'Phone:', and 'Email/Username: testaccount123@gozego.com'. A red arrow points up to the email field. On the right side, there is a 'Need Help?' box with a 'Click here for Support' link.

Login Issues - Password Reset



Resident Page

[change password](#)

address

city

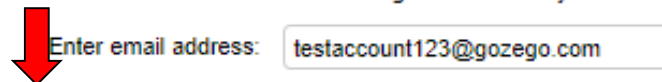
state

zip



Forgot your Password?

Please enter the email address registered with PayLease. Instructions will be sent to you.



Enter email address:

[Request 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: *	<input type="text" value="Zegozego"/>	Last Name: *	<input type="text" value="Test"/>
Unit:	<input type="text"/>	Phone:	<input type="text"/>
Email/Username: *	<input type="text"/> Email entered is already in the system		

Fields marked with an asterisk (*) are required.

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



ZEGO

Search:

Residents

Accounts

Trans

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		0000328477-5ijwAPu8RrqzZ3WNQFQPMKfMqRrFQjCgB8Wc6Y		Resident		Active	RS Test	HG Fenton Company	<ul style="list-style-type: none"> • Log As • Block • Reset Password • Clear Login Lockout



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.

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

First Name: * Last Name: *

Unit: Phone:

Email/Username: * ?

Fields marked with an asterisk (*) are required.

Need Help?
[Click here for Support](#)

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

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

First Name: * Last Name: *

Unit: Phone:

Email/Username: * ?

Fields marked with an asterisk (*) are required.

Need Help?
[Click here for Support](#)

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.

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 I: 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.

The screenshot displays the ZEGO user interface. At the top, the ZEGO logo is on the left, and navigation links for Home, Make Payment, AutoPay, Payment History, My Payment Accounts, My Profile, and Support Center are on the right. Below the navigation, the property information is shown: 'Property: 4540 Florida St' and 'Property Management Co: Mynd Management'. A search bar is present below this information. The main content area is divided into two sections. The left section, titled 'Make a Payment Now', shows a summary of amounts owed: 'Amount Owed: \$0.00 As of: 02/28/2020'. Below this, there are input fields for 'Lease Payment', 'Parking', 'Security Deposit', 'Late Fee / NSF Fee', and 'Application Fee', each with a '\$' symbol and a '0.00' value. A red arrow points to the 'As of: 02/28/2020' text. At the bottom of this section is a checkbox for 'Build your credit history by opting in to Credit Reporting' with a link to 'Learn The Benefits'. A dark blue button labeled 'Make One-Time Payment' is at the bottom of the section, with a red arrow pointing to it. The right section, titled 'Recent Payment History', contains a table with columns for 'Trans #', 'Date', 'Amount', and 'Status'. The table lists three transactions: 177645817 (Feb 28 20, \$2,000.00, Paid Out), 174545621 (Jan 31 20, \$2,000.00, Paid Out), and 171929101 (Jan 03 20, \$2,000.00, Paid Out). A 'View All Payments' button is located below the table. Underneath the table is the 'Active AutoPays' section, which includes a table with columns for 'Amount', 'Account', 'Debit Day', and 'Freq', and a link to 'Click here to set up a new AutoPay'.

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.

ZEGO Home **Make Payment** AutoPay Payment History My Payment Accounts My Profile Support Center

Property: 4540 Florida St
Property Management Co: Myrnd Management

One-Time Payment

① Amount ② **Account** ③ Review ④ Receipt

Payment for: **Lease payment** Payment Amount: **\$1000.00**

Select a Payment Account

Payment Method	Fee	Processing Time
<input type="radio"/> eCheck Chase #8901	\$4.95 Fee	Standard Processing Payment posts in 1 business day
<input type="radio"/> eCheck Bank Account	\$4.95 Fee	
<input type="radio"/> Credit Card VISA MASTERCARD DISCOVER	\$35.90 Fee	

Previous **Continue**

Need Help?
Click here for Support

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.”

① Amount ② Account ③ Review ④ Receipt

Payment for: **Lease payment** Payment Amount: **\$1000.00**

Bank Account Details

Name on Account:

Bank Name: Account Type:

Routing Number (9 digits): ?

Account Number: ?

Confirm Account Number:

* All fields are required

① Amount ② Account ③ Review ④ Receipt

Payment for: **Lease payment** Payment Amount: **\$1000.00**

Card Account Details

Card Number: CV2: ?

Expiration Mo: Expiration Yr:

First Name: Last Name:

Billing Address: Address Cont:

Billing Country: Billing City:

Billing State: Billing Zip:

- OR -

[Learn More](#)

By clicking CONTINUE, you grant Zego permission to store your card credentials. [Read more](#)

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, [REDACTED] 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	Payment Account	Edit
Lease payment:	\$1000.00	Bank Name:	Chase
Fee:	\$4.95	Account Number:	#8901
Total:	\$1004.95	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](#).

DEMO

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

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) if 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.

ZEGO

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

Property: Hawthorne House Apartments 1712
Property Management Co: JL Woode Management Company
[Manage Accounts](#)

Account Number: t0005440 Association: Hawthorne House Apartments

AUTOPAY

Create New AutoPay

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.

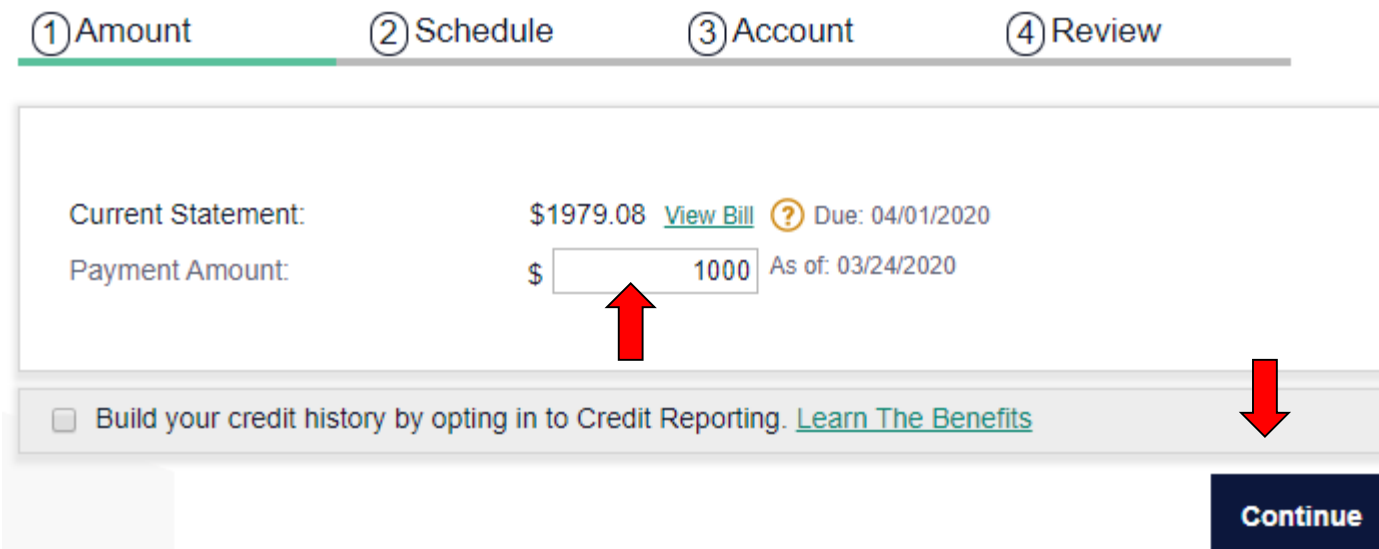
① Amount ② Schedule ③ Account ④ Review

Current Statement: \$1979.08 [View Bill](#) ⓘ Due: 04/01/2020

Payment Amount: \$ As of: 03/24/2020

Build your credit history by opting in to Credit Reporting. [Learn The Benefits](#)


Continue



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: *	<input type="text" value="04/01/2020"/>  
Payment Frequency: *	<input type="text" value="Monthly"/> ▼
Final Payment Month/Year: *	<input type="checkbox"/> Indefinite <input type="text" value="12/2020"/>  

Fields marked with an asterisk (*) are required.

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.

① Amount ② Schedule ③ Account ④ Review

Payment for: **Payment amount** Payment Amount: **\$1000.00**

Select a Payment Account

	Standard Processing Payment posts in 1 business day
<input type="radio"/> eCheck Ameriprise FSB #9130	FREE
<input type="radio"/> eCheck Bank Account	FREE
<input type="radio"/> Credit Card 	\$29.95 Fee

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 Account	Edit
Payment amount:	\$1000.00	Bank Name:	Ameriprise FSB
Total:	\$1000.00	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

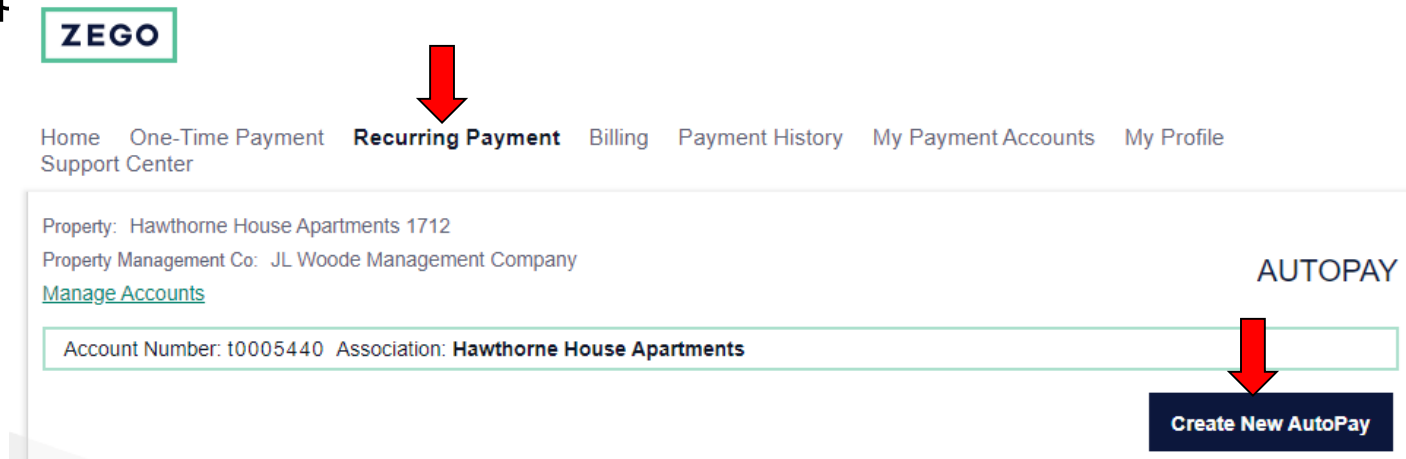
- Once the payment begins processing, a refund can only be authorized through your management company.
- Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego system will be subject to criminal investigation and these individuals will be prosecuted to the fullest 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: 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.










The screenshot shows the ZEGO web portal interface. At the top, the ZEGO logo is in the upper left. A navigation menu includes Home, One-Time Payment, Recurring Payment (highlighted with a red arrow), Billing, Payment History, My Payment Accounts, and My Profile. Below the navigation, the user's account information is displayed: Property: Hawthorne House Apartments 1712, Property Management Co: JL Woode Management Company, and a link to Manage Accounts. The account details section shows Account Number: 10005440 and Association: Hawthorne House Apartments. To the right of this section, the word AUTOPAY is displayed. Below the account details, a red arrow points to a dark blue button labeled 'Create New AutoPay'.

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: *	<input checked="" type="checkbox"/> Indefinite	 
Maximum Limit	<input checked="" type="checkbox"/>  like to set a Maximum Limit 	
	\$ 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.

① Amount ② Schedule ③ Account ④ Review

Payment for: **Payment amount** Payment Amount: **\$1000.00**

Select a Payment Account

	Standard Processing Payment posts in 1 business day
<input type="radio"/> eCheck Ameriprise FSB #9130	FREE
<input type="radio"/> eCheck Bank Account	FREE
<input type="radio"/> Credit Card 	\$29.95 Fee

[Previous](#) [Continue](#)

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		Payment Account	
Payment amount:	\$1000.00	Bank Name:	Ameriprise FSB
Total:	\$1000.00	Account Number:	#9130
		Routing Number:	091071611
		Name on Account:	Ross Bergman

Payment Schedule			
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

This option will cancel the AutoPay.

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.

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.

AutoPay details found here.

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.

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>



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