My Account training

Facilitator: <Name>

Sydney WATER

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Course Overview

Upon completion of the hands-on My Account functionality training, Sydney Water employees (Managing Agents, Individual owner/Authorised contract) will have thorough understanding of how to navigate My Account portal.

Learning Support Materials:

Documents	Description
Role specific participant guides	Step-by-step explanations of the functionality
Teach back assignments (for participants)	Evaluation of topics covered
Facilitator guides (for trainers)	Train the trainer guidance for effective facilitation.

Learning Objectives

By the end of this course participants will be able to:

- Use the My Account portal

- Demonstrate the customer-provided functionality of My Account
    - Managing bills
    - Managing account

- Describe the ways of contacting Sydney Water for billing and payment related issues

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Introductions

Please share ….

- Tell us your name.
- What is your role at Sydney Water?
- Were you a My Account portal tester?
- Tell us one fun thing about you!

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Hands-on application training

Getting started: Overview

This section focuses on the Header logo and Profile button functionality in addition to the Overview page content functionality.

Also, you will be able to navigate the do the following:

- Overview page using drop-down options,
- Access the Quick links (hyperlinks)
- View payment amounts due for a chosen property

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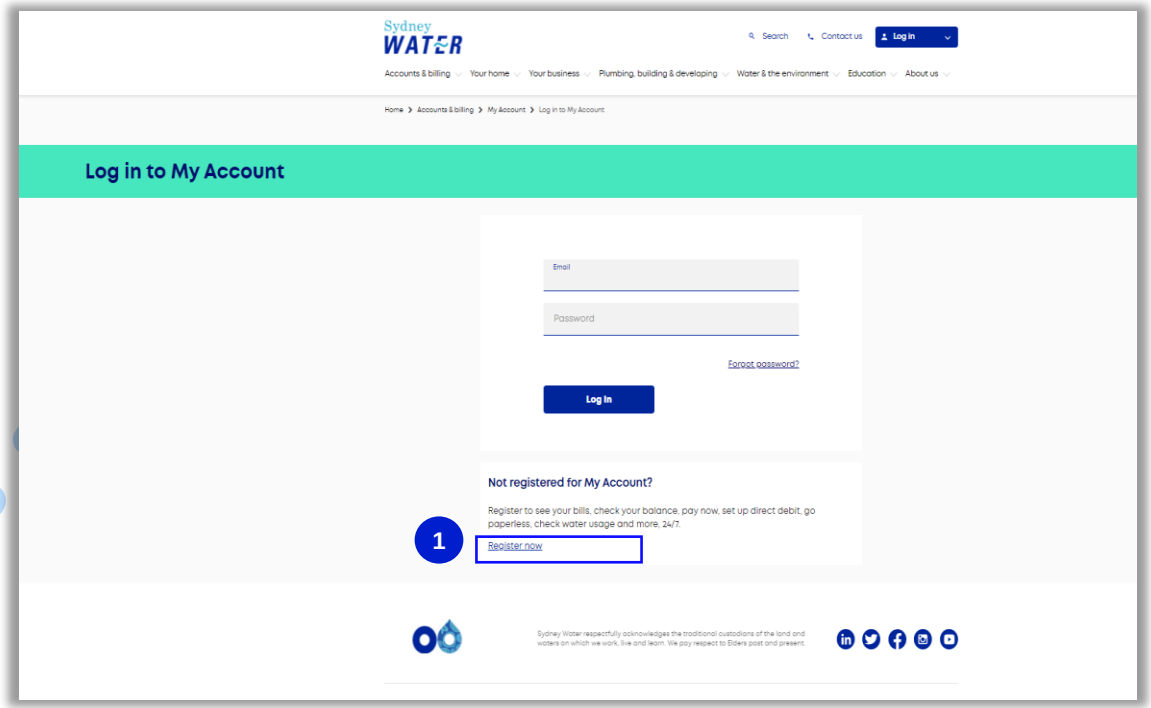
Getting started: Register for My Account (1 of 8)

1. On the **Log in to My Account** page, click **Register now** link.



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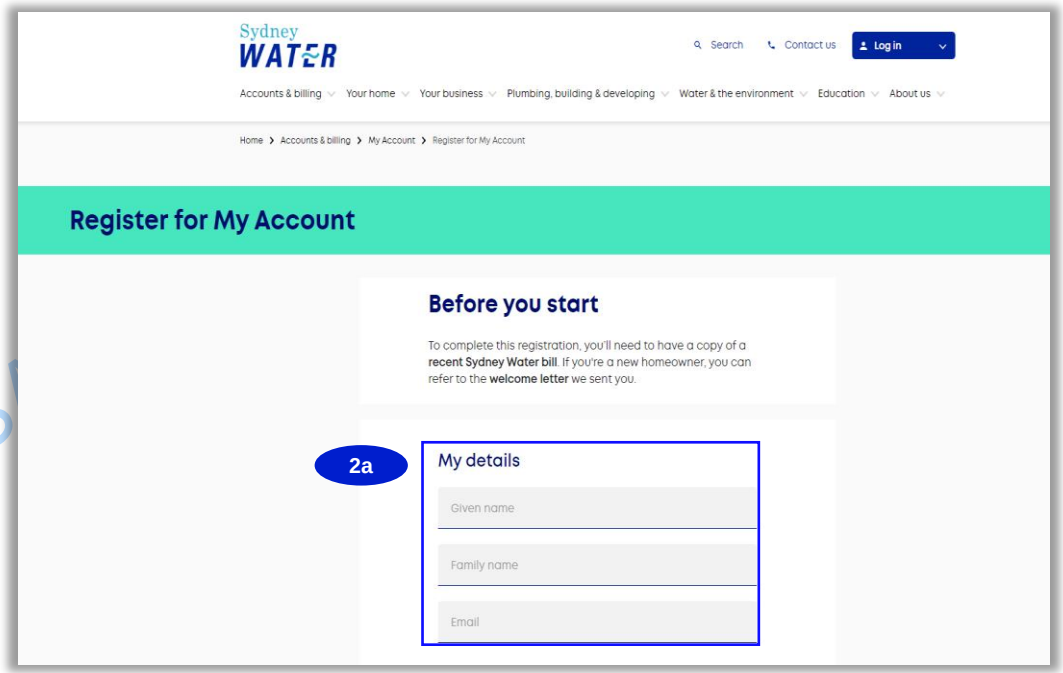
Getting started: Register for My Account (2 of 8)

The system displays the **Register for My Account** page.

2a. Enter the following fields in **My details** section:

- **Given name**
- **Family name**
- **Email**



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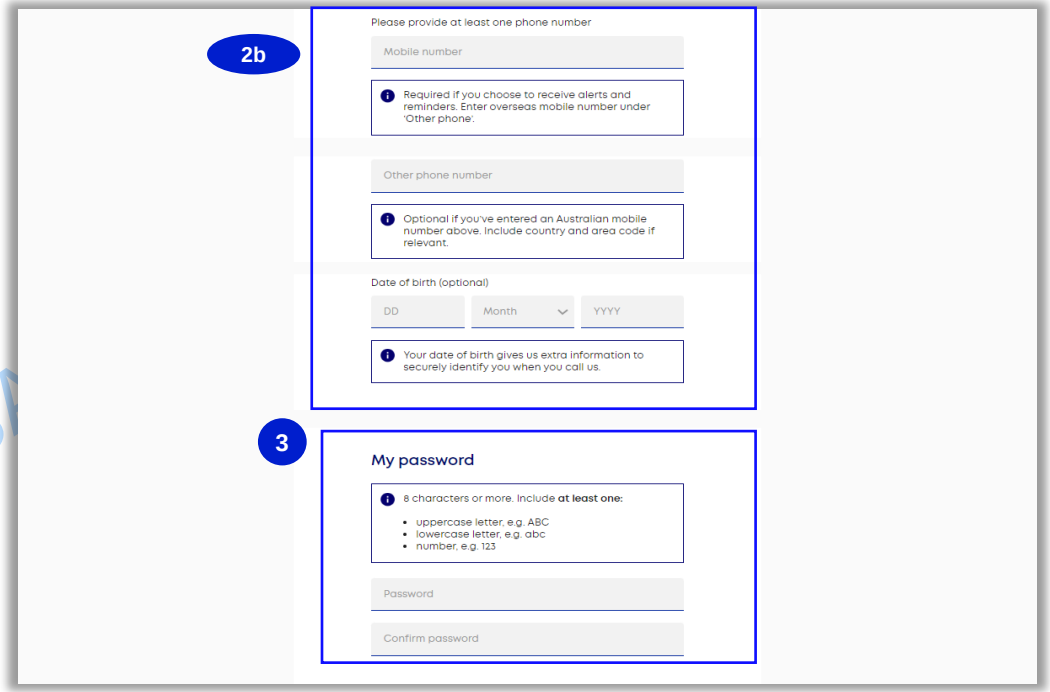
Getting started: Register for My Account (3 of 8)

2b. Scroll down to fill the other fields in **My details** section:

- **Mobile number**
- **Other phone number**
- **Date of birth**

3. Enter the following fields in **My password** section:

- **Password**
- **Confirm password**



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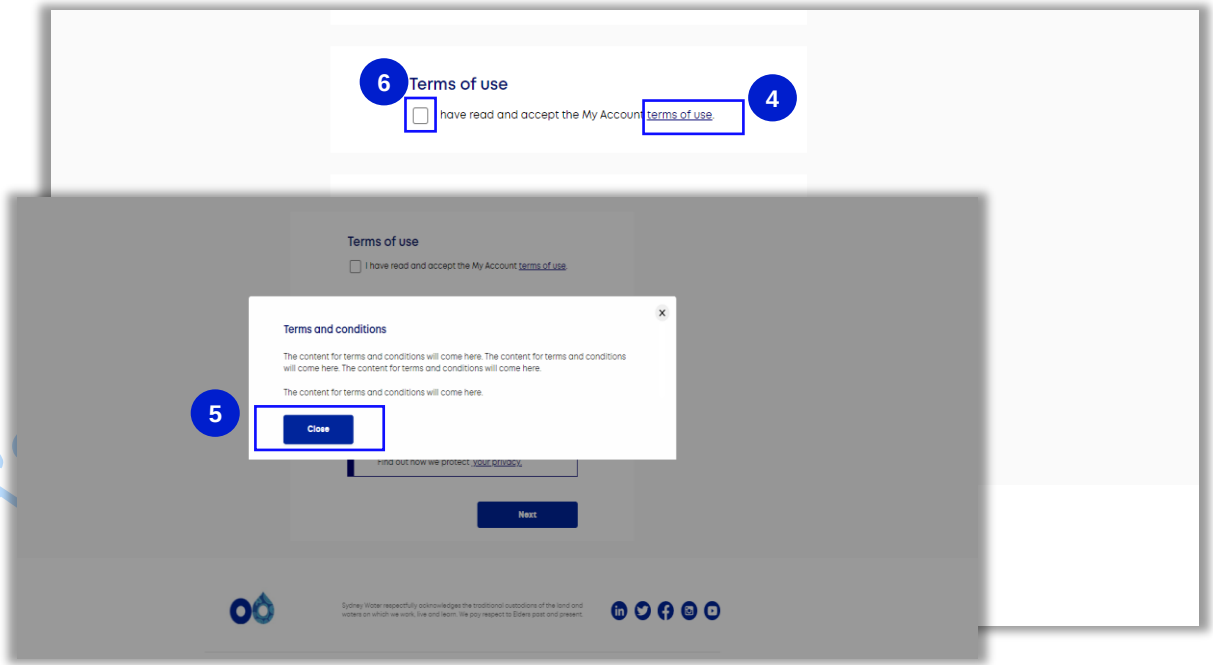
Getting started: Register for My Account (4 of 8)

4. Click the **terms of use** link to read through the **Terms and conditions**.

5. Click the **Close** button on the **Terms and conditions** popup window.

6. Select the **Terms of use** checkbox.



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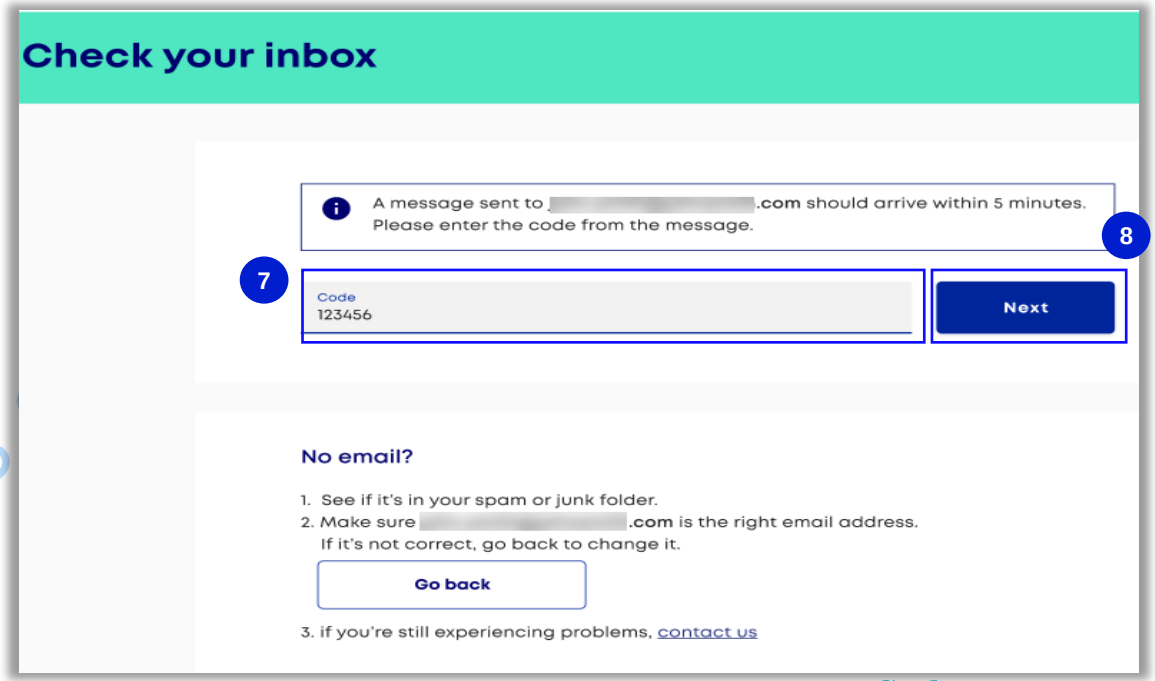
Getting started: Register for My Account (5 of 8)

The system sends an activation email on your registered email address as displayed in the **Check your inbox** page.

7. Enter the verification code received in your email address.

For the purpose of this demo, **123456** is entered as the **Code**.

8. Click **Next**.



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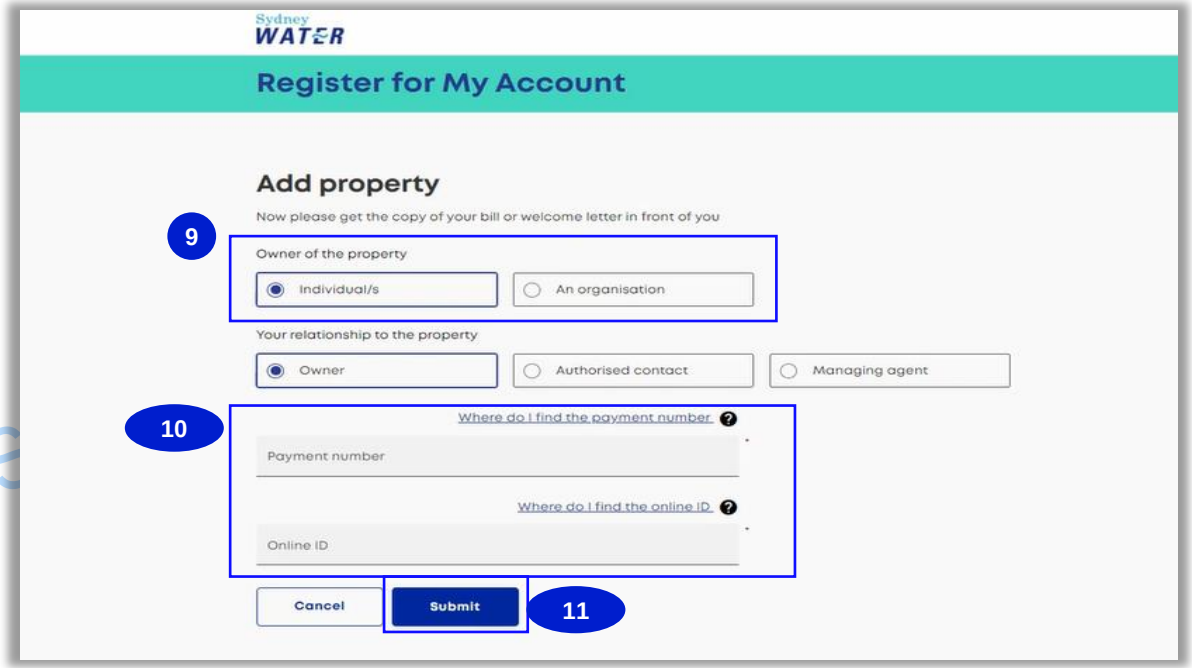
Getting started: Register for My Account (6 of 8)

The system displays the **Add property** page as shown here.

9. You can register as an individual **Owner** (or Authorised contact or Managing Agent) or as **An organization**.

10. Enter all the mandatory fields, such as **Payment number**, **Online ID**.

11. Click **Submit**.



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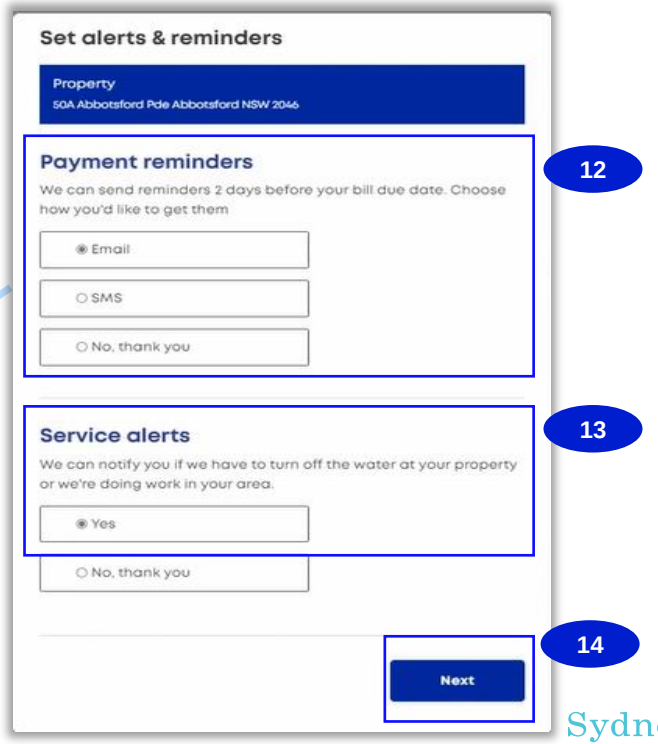
Getting started: Register for My Account (7 of 8)

The system displays the **Set alerts & reminders** window.

12. Select the mode to receive **Payment reminders** – **Email** or **SMS**.

13. Select **Yes** to receive **Service alerts**.

14. Click **Next** to complete the registration process and login to the My Account.



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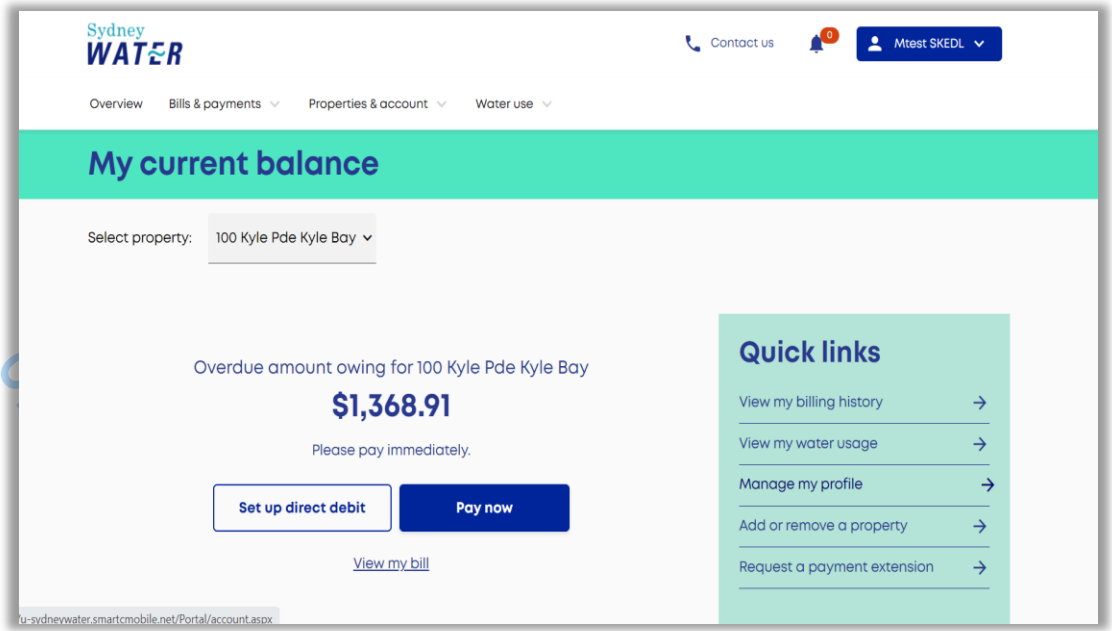
Getting started: Register for My Account (8 of 8)

Once the registration process is completed, the system displays the *Overview* page or *Dashboard*.



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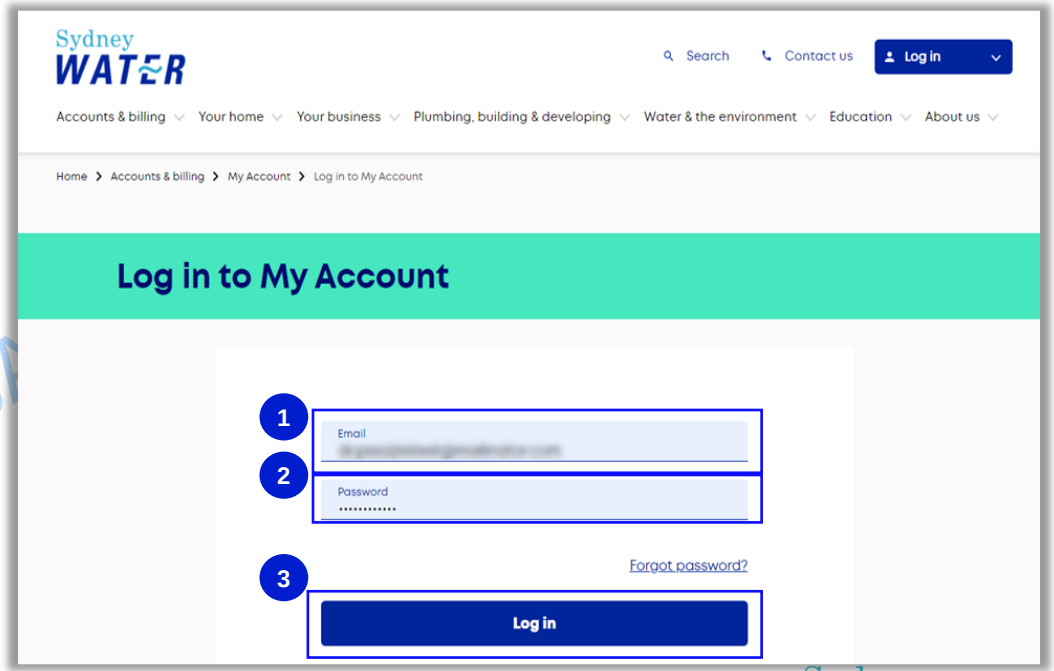
Getting started: Login into My Account

1. Enter your Email address in the **Email** field on the **Log in to My Account** page.
2. Enter your password in the **Password** field
3. Click **Log in**.

The system verifies your credentials and displays the *Overview* page.



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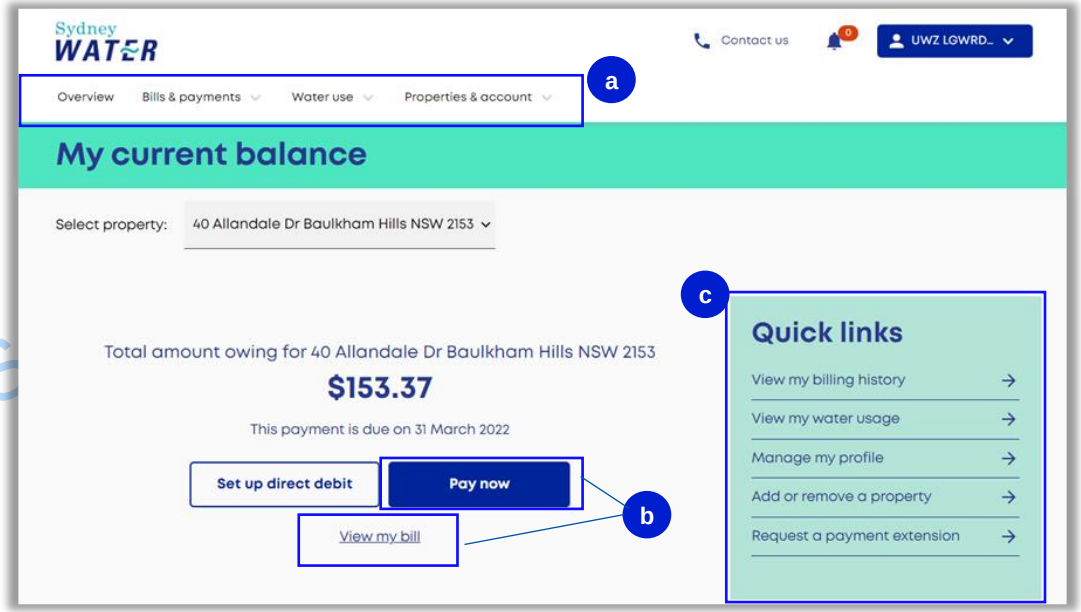
Getting started: Overview/Home page

a. The *Overview/Home* page displays the Quick Access bar to access various modules.

b. It allows you to view and pay your bill.

c. From the **Quick links**, you can also perform the following actions:

- **View my billing history**
- **Manage my profile**
- **Add or remove a property**
- **Request a payment extension**



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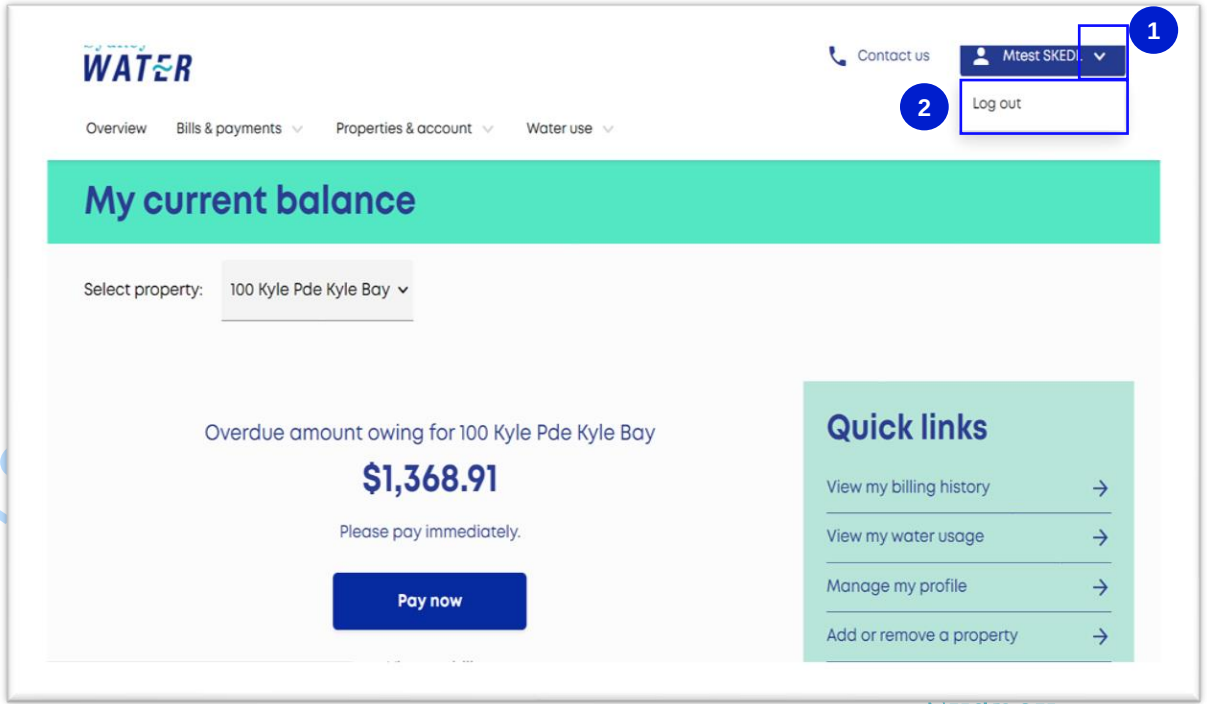
Getting started: Log out

1. Click the dropdown next to the username at the top right corner of the *Overview* page.

2. Click **Log out**.



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Learning check (1 of 2)

Identify the My Account registration fields. (Choose all that apply.)

- ☐ Family name
- ☐ Number of years at property
- ☐ Mobile number
- ☐ Date of birth (optional)

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Learning check (1 of 2)

Identify the My Account registration fields. (Choose all that apply.)

- [x] Family name
- [ ] Number of years at property
- [x] Mobile number
- [x] Date of birth (optional)

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Learning check (2 of 2)

When registering for the My Account portal as an Individual you must specify your relationship to the property as either Owner, Authorised Contact or Managing Agent.

- ◯ True
- ◯ False

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Learning check (2 of 2)

When registering for the My Account portal as an Individual you must specify your relationship to the property as either Owner, Authorised Contact or Managing Agent.

- [x] True
- [ ] False

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Managing your bills: Overview

This section focuses on accessing and viewing bills and payment history.

This will allow you to make edits to their property details, add or remove a property and access Quick links (hyperlinks) to additional content.

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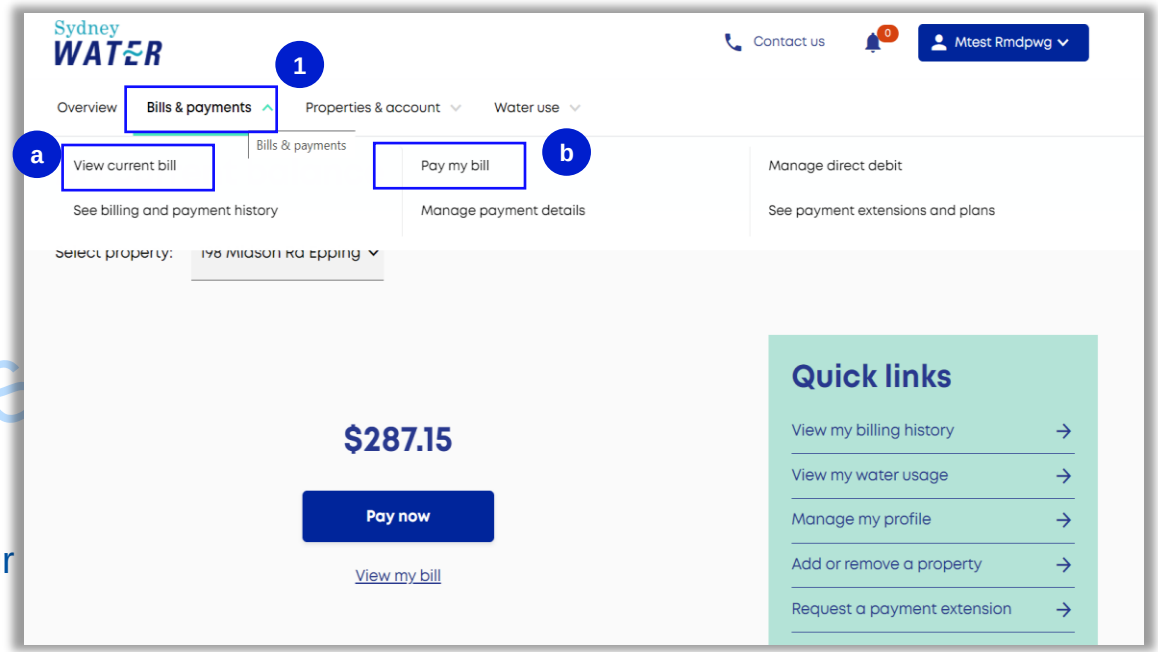
Managing your bills: Bills & payments (1 of 2)

1. Click the downward arrow beside **Bills & payments** to manage your bills.

This module displays the following modules:

a. **View current bill**: Enables you to view Sydney Water bills

b. **Pay my bill**: Enables you to pay your bill



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Managing your bills: Bills & payments (2 of 2)

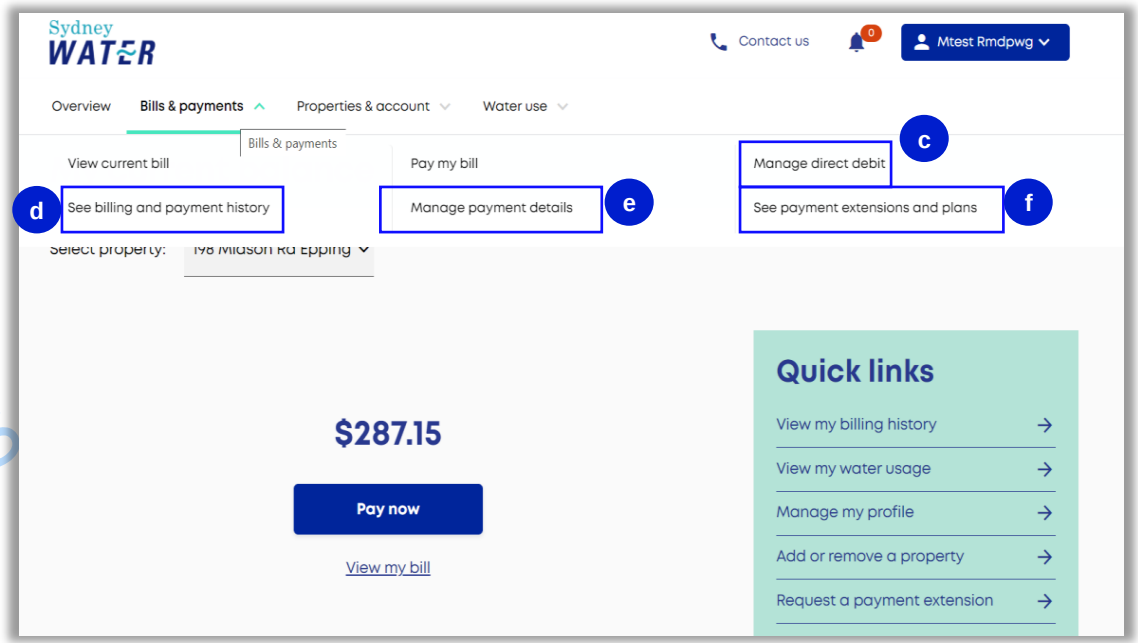
c. **Manage direct debit**: Enables you to manage direct debit.

d. **See bills and payment history**:

e. **Manage payment details**:

f. **See payment extensions and plans**:

Note: You will learn details of each section later in the course.



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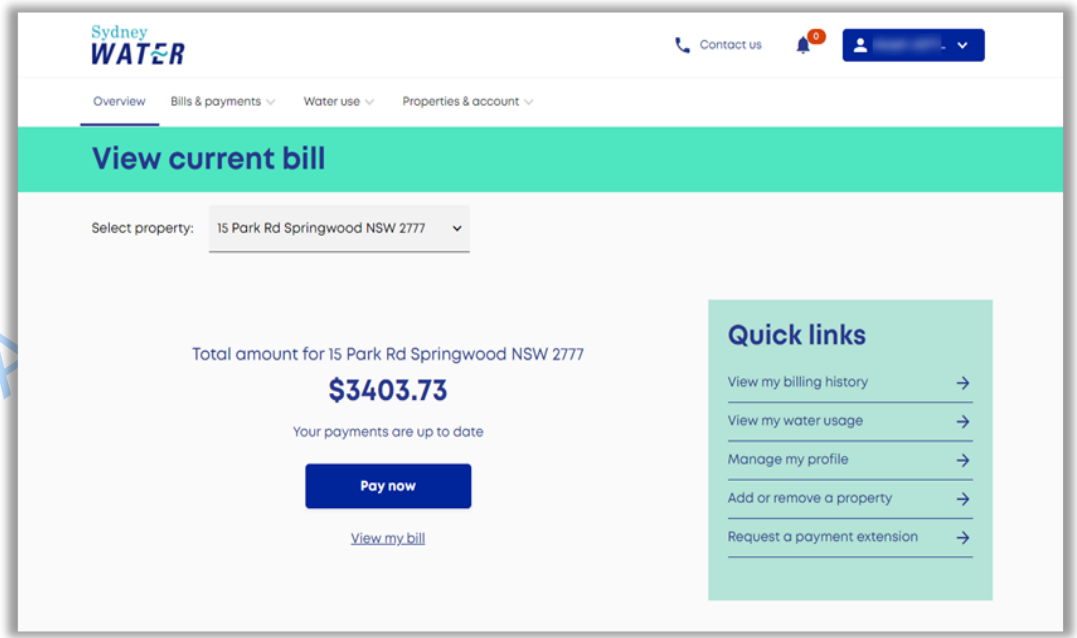
Bills & payments: View current bill (1 of 2)

1. Click the **View current bill** module under **Bills & payments** section.

- Displays your current balance.
- Set up direct debit
- Pay now
- View my bill
- Bill Summary



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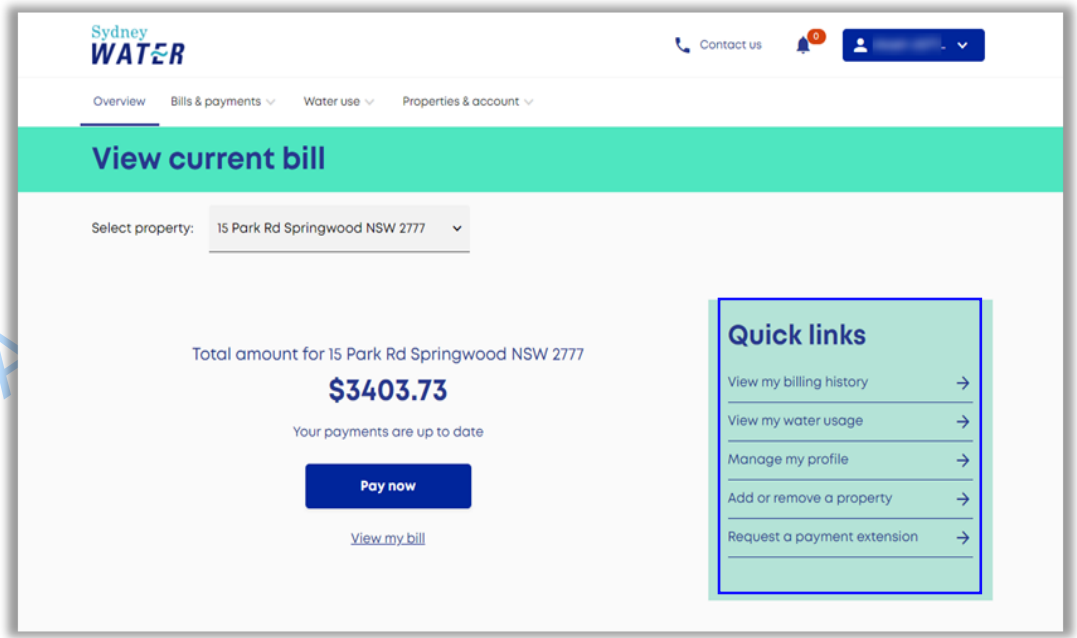
Bills & payments: View current bill (2 of 2)

You will also be able to access the quick links from the *Overview* page.

Quick links:

- View my billing history
- Manage my profile
- Add or remove a property
- Request a payment extension



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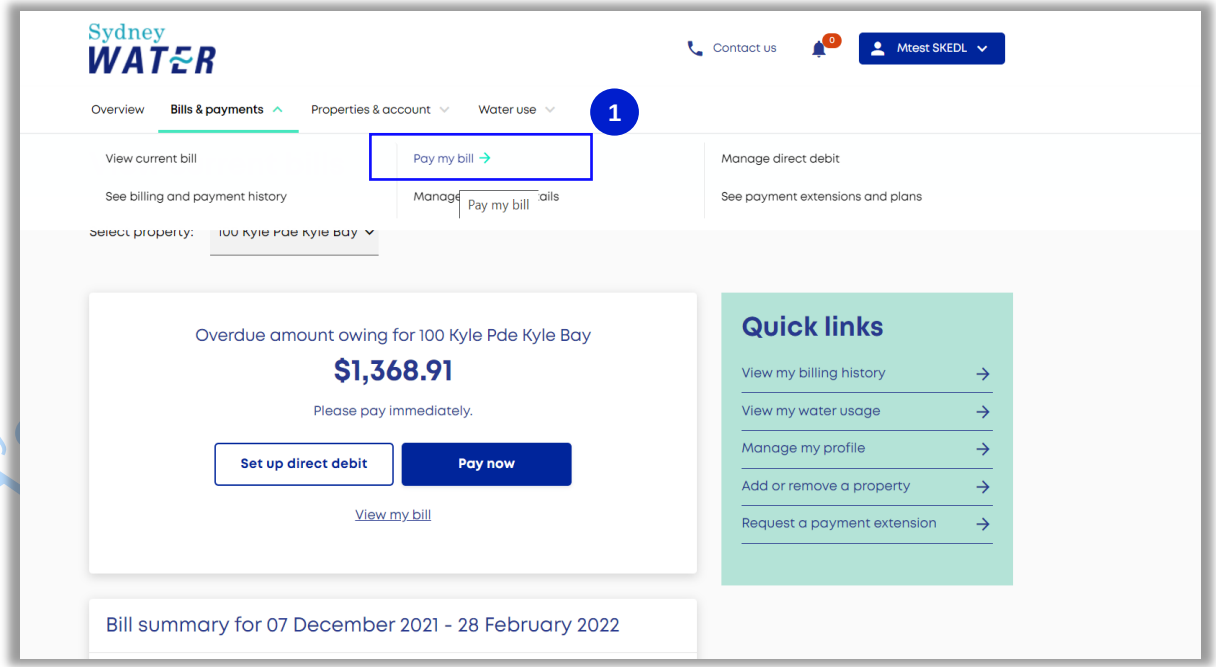
Bills & payments: Paying your bill (1 of 5)

1. Click the **Pay my bill module** under **Bills & payments** section to view your due amount and the due date.



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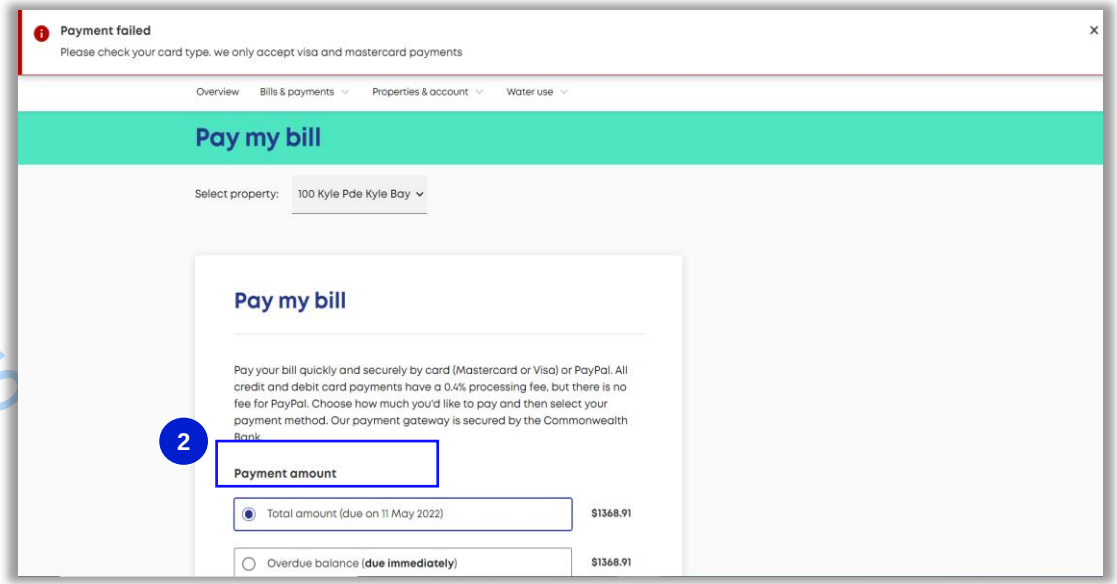
Bills & payments: Paying your bill (2 of 5)

The **Pay my bill** page displays your amount due and the due date.

2. Select the required option under the **Payment amount** section, depending on if you want to pay the due amount or any other amount.



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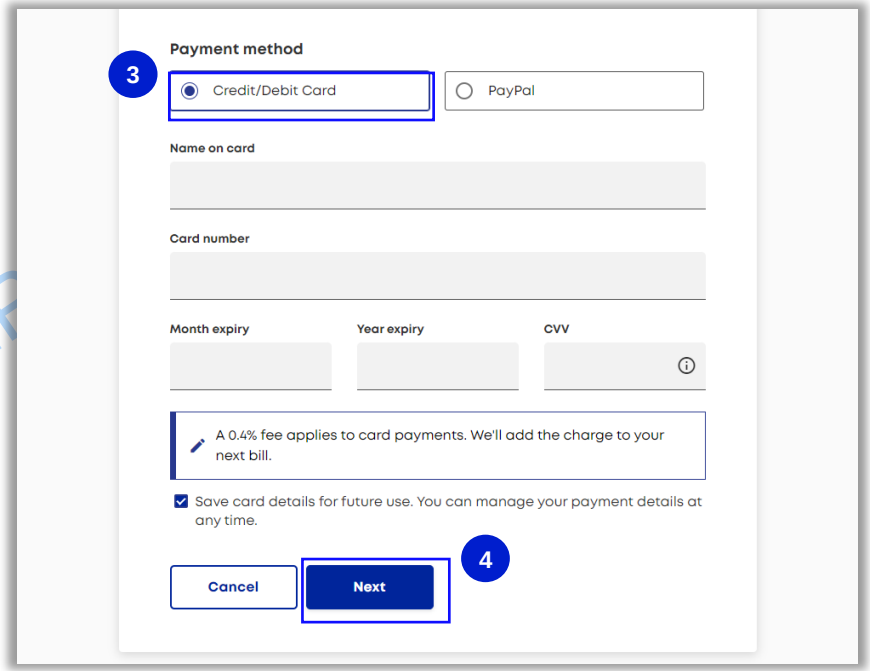
Bills & payments: Paying your bill (3 of 5)

Scroll down the **Pay my bill** page to view the **Payment method** section.

3. Select the payment method under the **Payment method** section, to view the card details that you have added or choose a new payment method to add a new payment mode through Adding Payment Method.

For the purpose of this demo, **Credit/Debit Card** has been selected.

4. Click the **Next** button.



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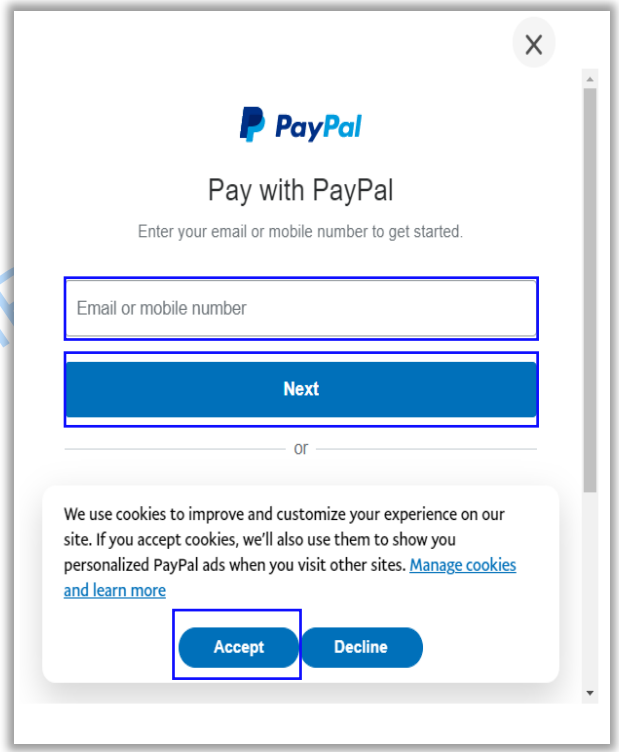
Bills & payments: Paying your bill (4 of 5)

Alternatively, if you select **PayPal** instead of **Credit/Debit Card**, the system displays following page.

3. Enter the registered **Email or mobile number**.

4. Click **Accept** after going through the Manage cookies section.

5. Click the **Next** button to make the payment.



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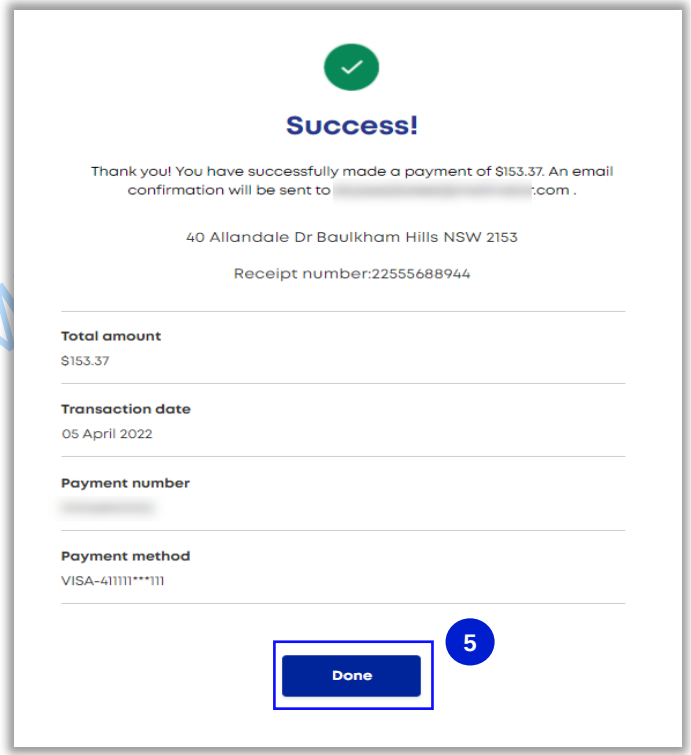
Bills & payments: Paying your bill (5 of 5)

The system will display a confirmation Also, an email confirmation will be sent to the registered Email Id.

5. Click the **Done** button.



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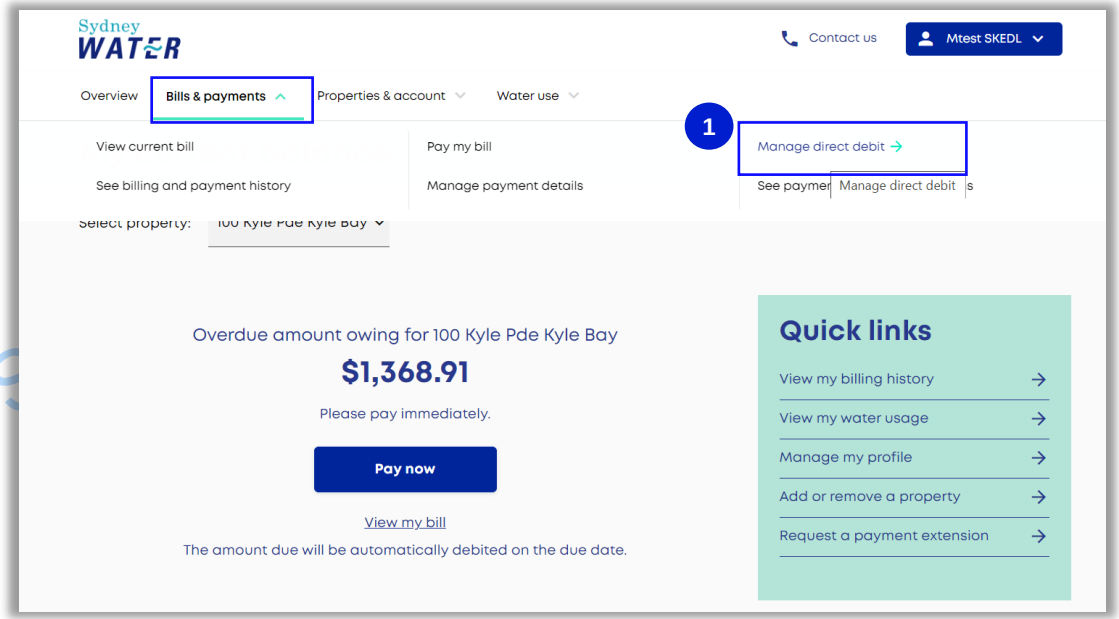
Bills & payments: Manage direct debit (1 of 5)

1. Click the **Manage direct debit** option under the **Bills & payments** module, to set up a direct debit for your account.



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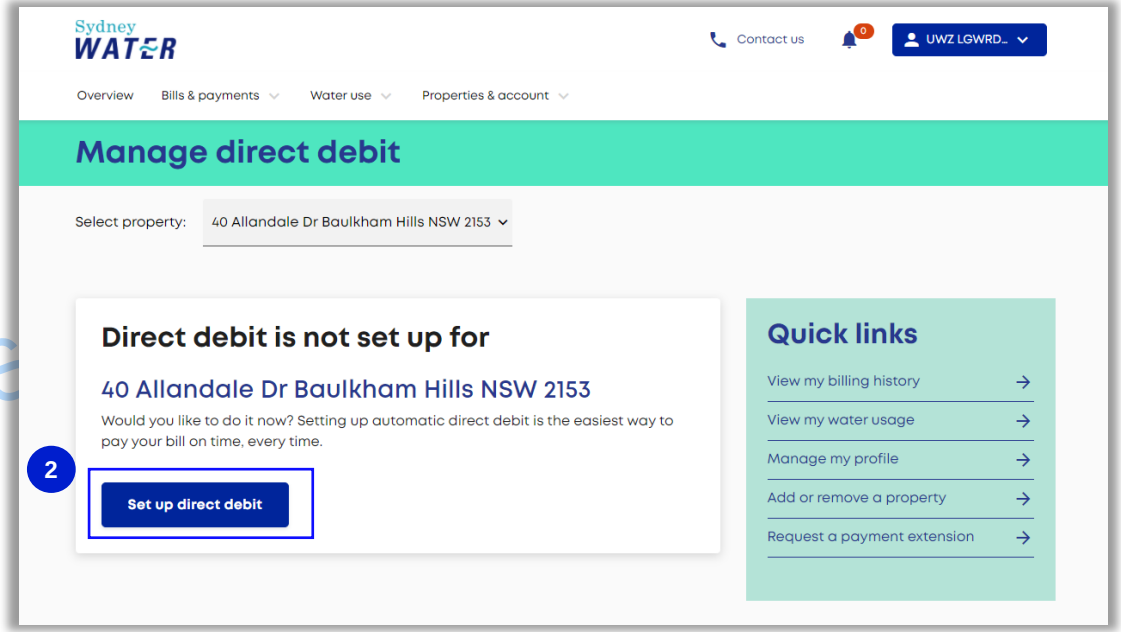
Bills & payments: Manage direct debit (2 of 5)

2. Click the **Set up direct debit** button.



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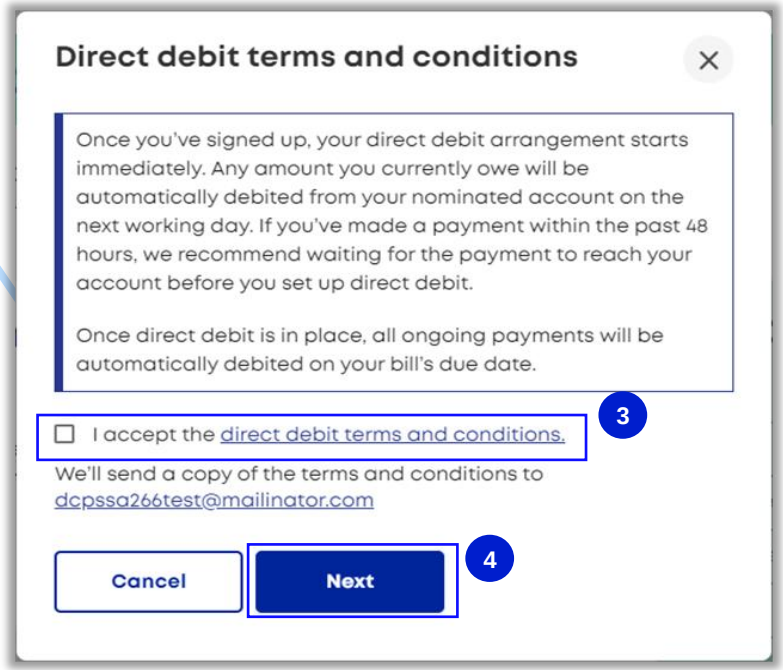
Bills & payments: Manage direct debit (3 of 5)

The system displays the **Direct debit terms and conditions** window as shown here.

3. Select the terms and conditions checkbox.

4. Click **Next**.



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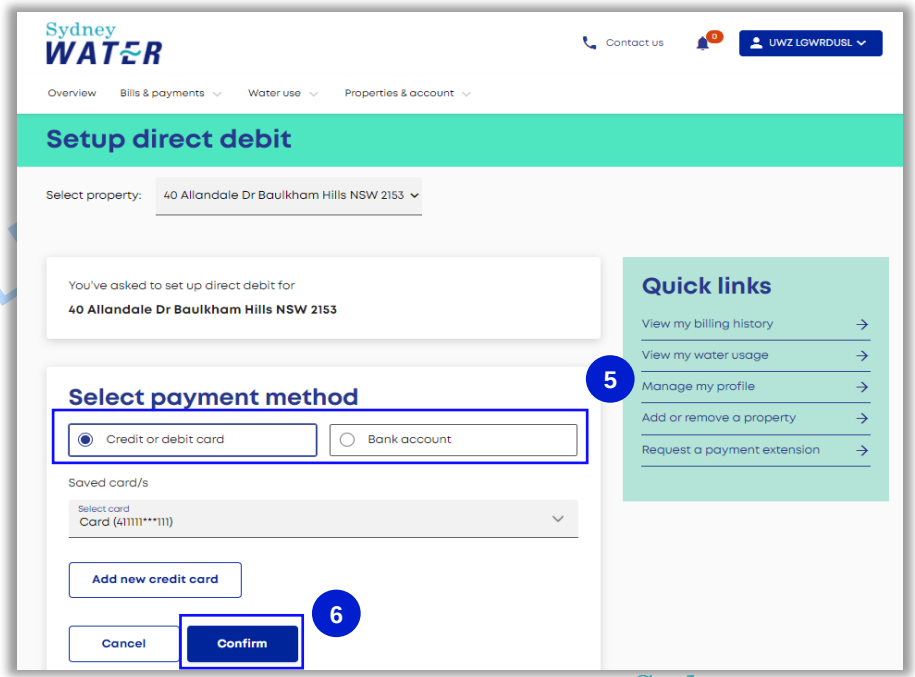
Bills & payments: Manage direct debit (4 of 5)

The system displays **Setup direct debit** page.

5. Select the payment method for direct debit.
You can select either **Credit or debit card**/ **Bank account**.
Alternatively, you can add a new payment method.
For the purpose of this demo, **Credit or debit** card is selected.

6. Click the **Confirm** button.

The system enrolls the property in direct debit.



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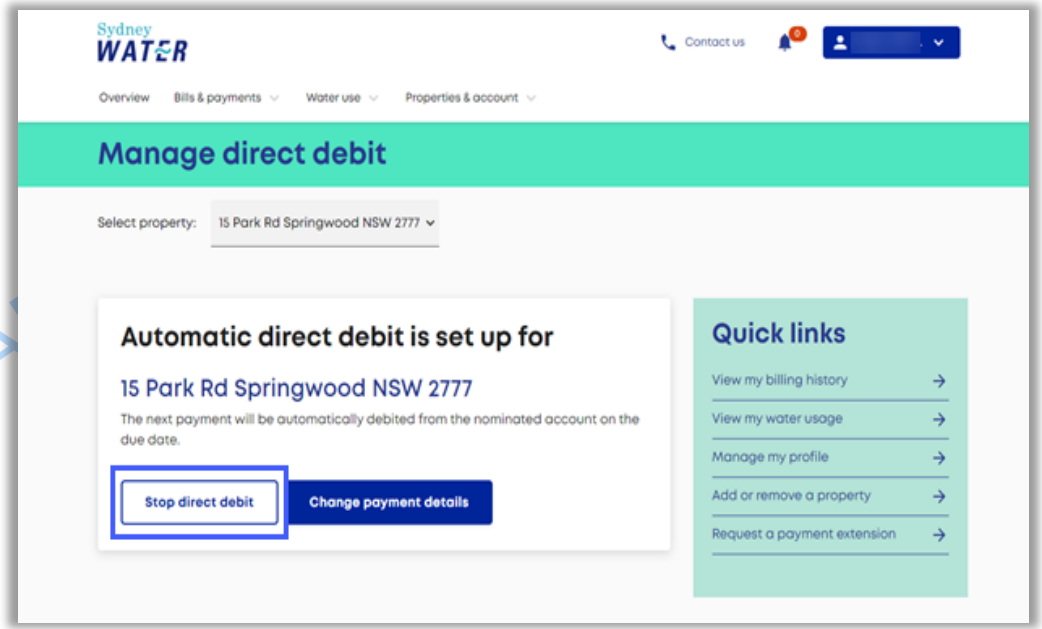
Bills & payments: Manage direct debit (5 of 5)

Once the direct debit is set, the payment is automatically deducted from your account on the due date.

You can also stop the direct debit with the option **Stop direct debit**.



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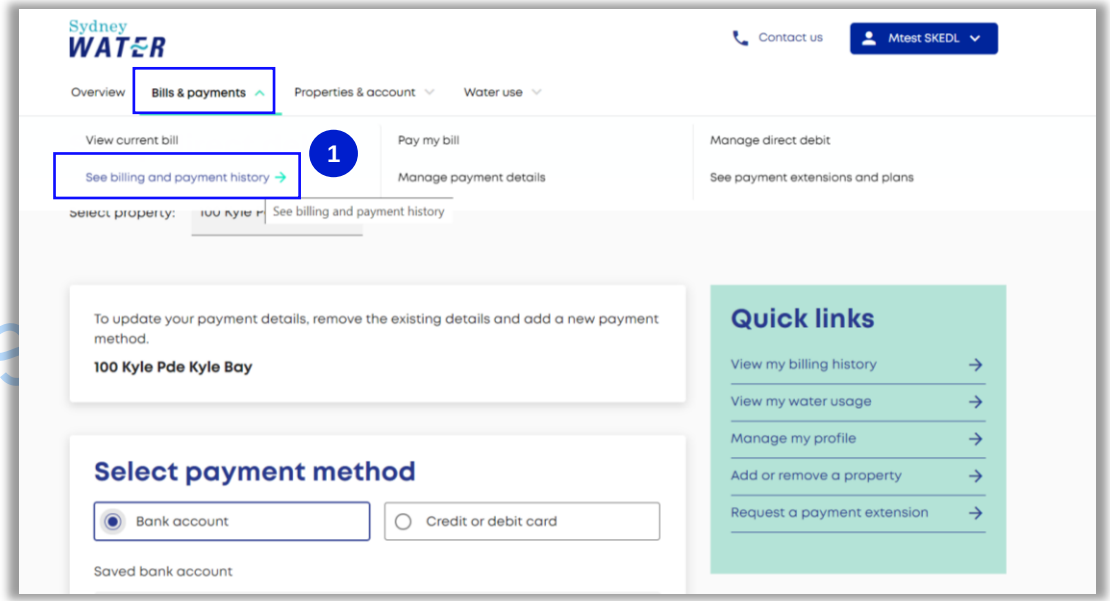
Bills & payments: See billing and payment history (1 of 3)

1. Click the **See billing and payment history** option under the **Bills & Payment** module, to view the history of your past bill payments and Sydney Water bills.



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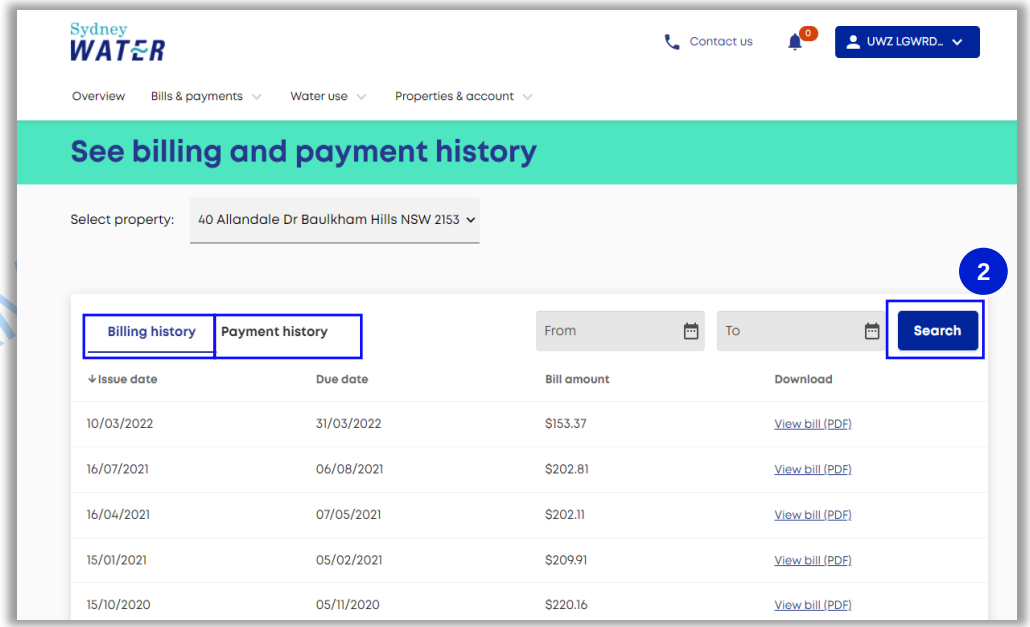
Bills & payments: See billing and payment history (2 of 3)

- The system displays the **See billing and payment history** page with two tabs – **Billing history** and **Payment history.**

- On both the tabs, you can specify the date range for which you want to view the details.

2. Click the **Search** button.

- The system displays the relevant data based on the selected date.



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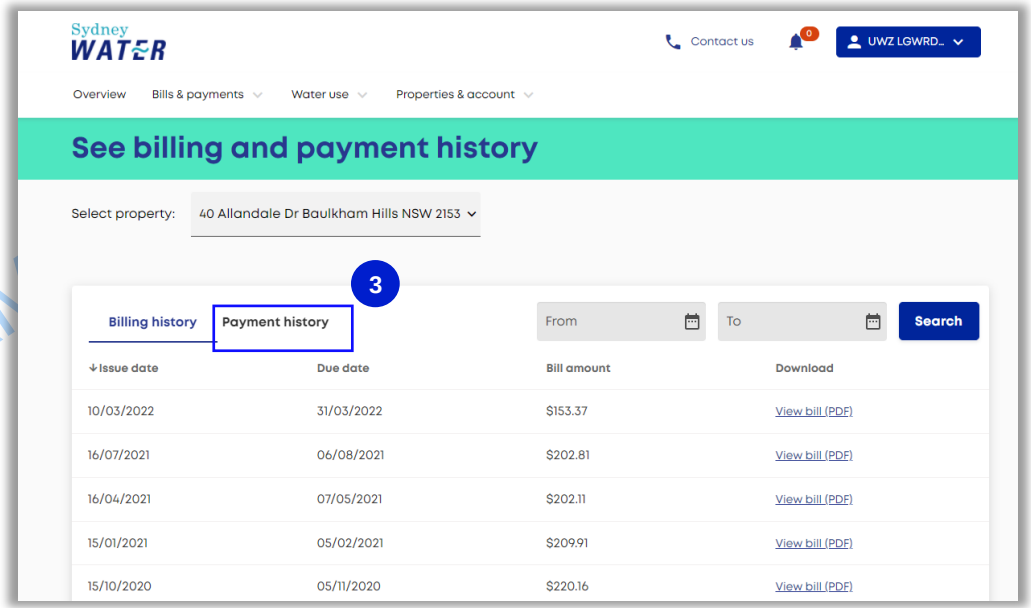
Bills & payments: See billing and payment history (3 of 3)

3. Click the **Payment history** tab to view the payment transactions that you have made in the last 3 years.



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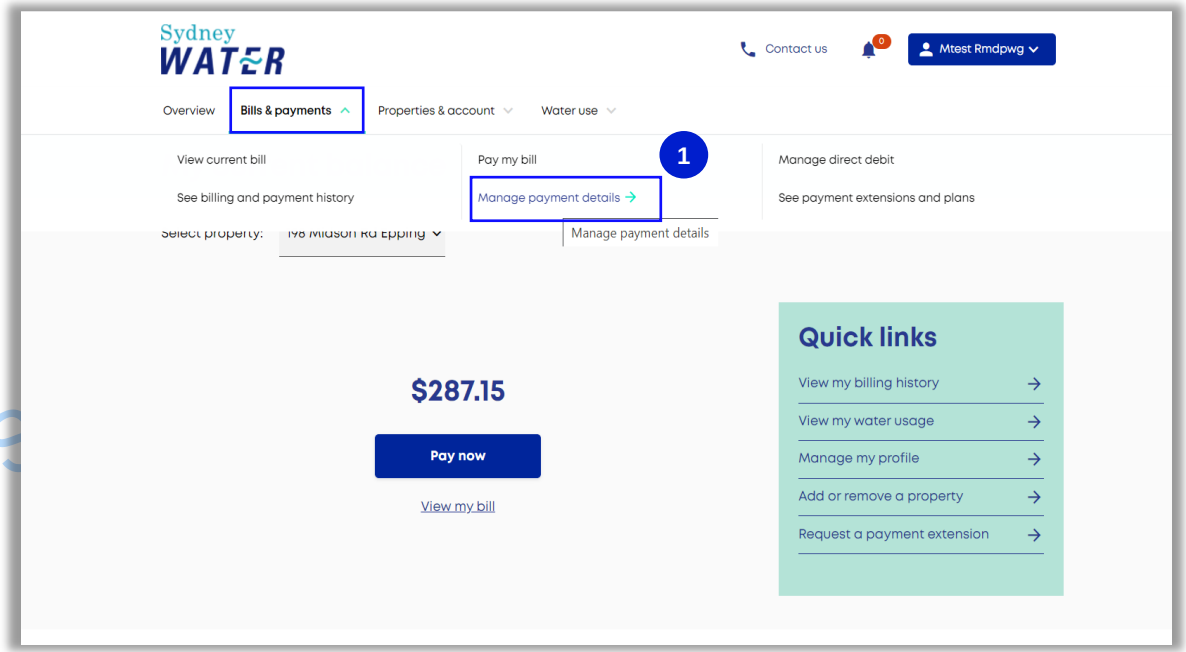
Bills & payments: Manage payment details (1 of 6)

1. Click the **Manage payment details** option under the **Bills & payments** module.



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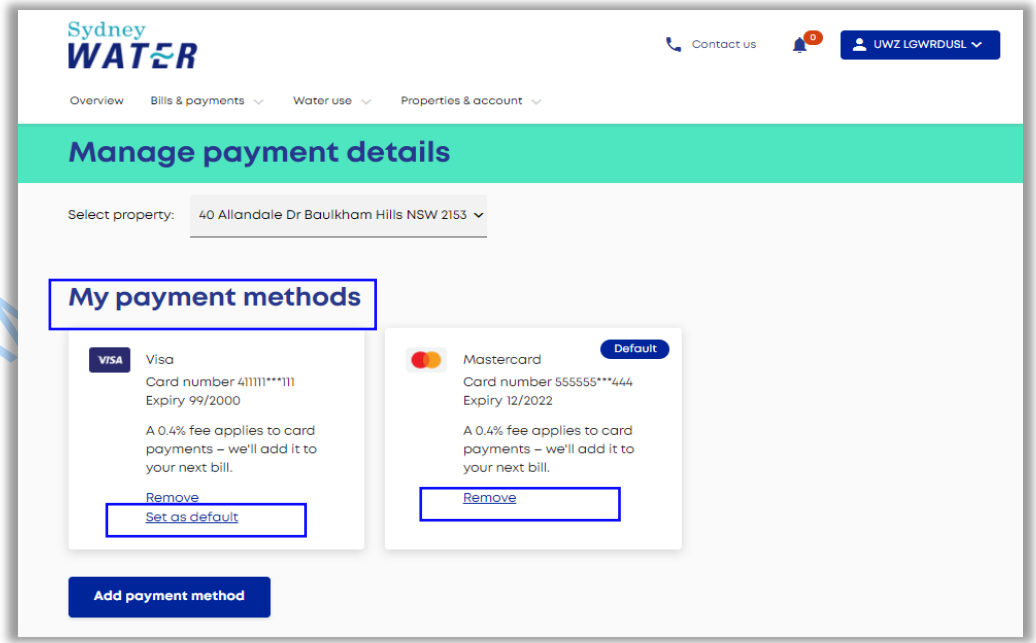
Bills & payments: Manage payment details (2 of 6)

The system displays the **Manage payment details** page.

Under **My payment methods** you can perform the following actions:

- Set a payment method as default – You can click the **Set as default** hyperlink to set the payment method as default.
- Remove the default payment method – You can click the **Remove** hyperlink to remove or delete the payment method.



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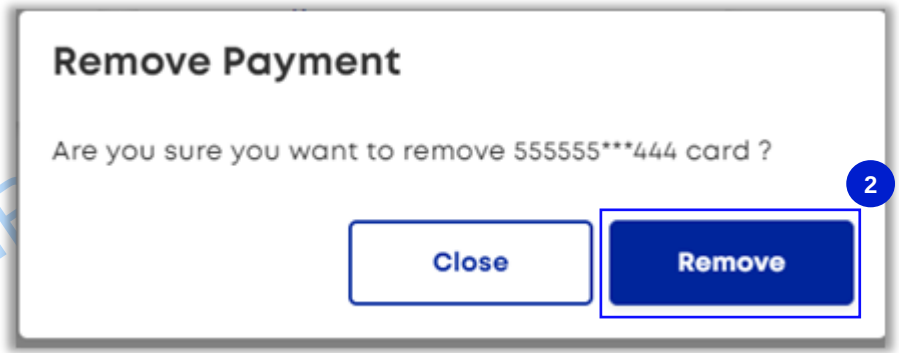
Bills & payments: Manage payment details (3 of 6)

The system displays a confirmation message.

2. Click **Remove** to confirm the deletion.



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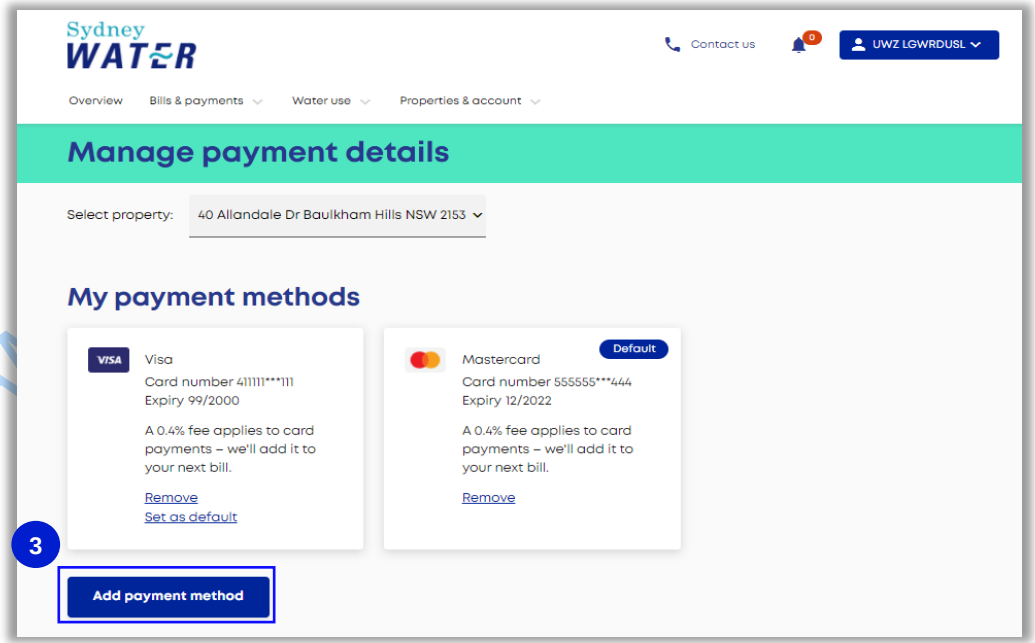
Bills & payments: Manage payment details (4 of 6)

3. Click the **Add payment method** button on the **Manage payment details** page.



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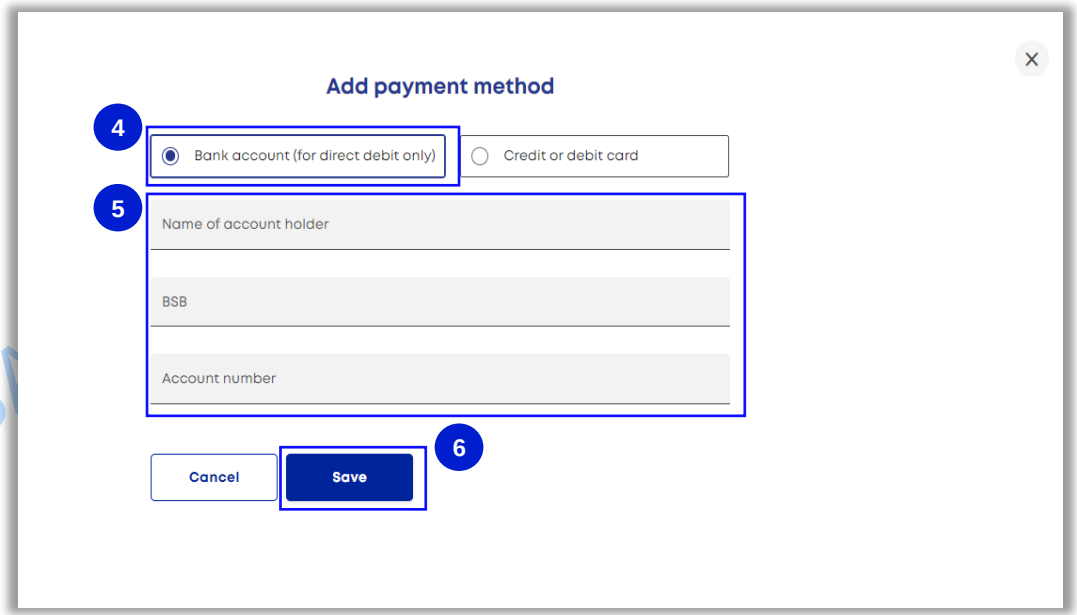
Bills & payments: Manage payment details (5 of 6)

The system displays the **Add payment method** page.

4. Select one of the following options:
- **Bank account (for direct debit only)**
- **Credit or debit card**

For the purpose of this demo, **Credit or debit card** is selected.

5. Enter the following fields:
    - **Name of account holder**
    - **BSB**
    - **Account number**
6. Click the **Save** button.



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Bills & payments: Manage payment details (6 of 6)

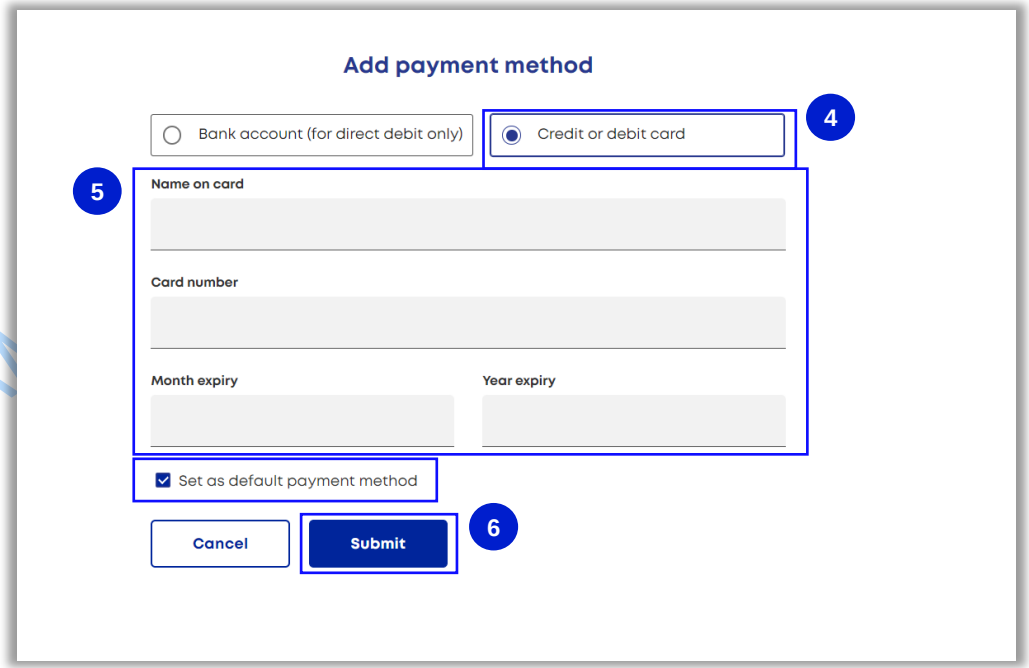
Alternate option:

4. Select **Credit or debit card**.

5. Enter the following fields:
   - **Name on card**
   - **Card number**
   - **Month Expiry**
   - **Year expiry**

You may select the **Set as a default payment method** checkbox.

6. Click the **Submit** button.



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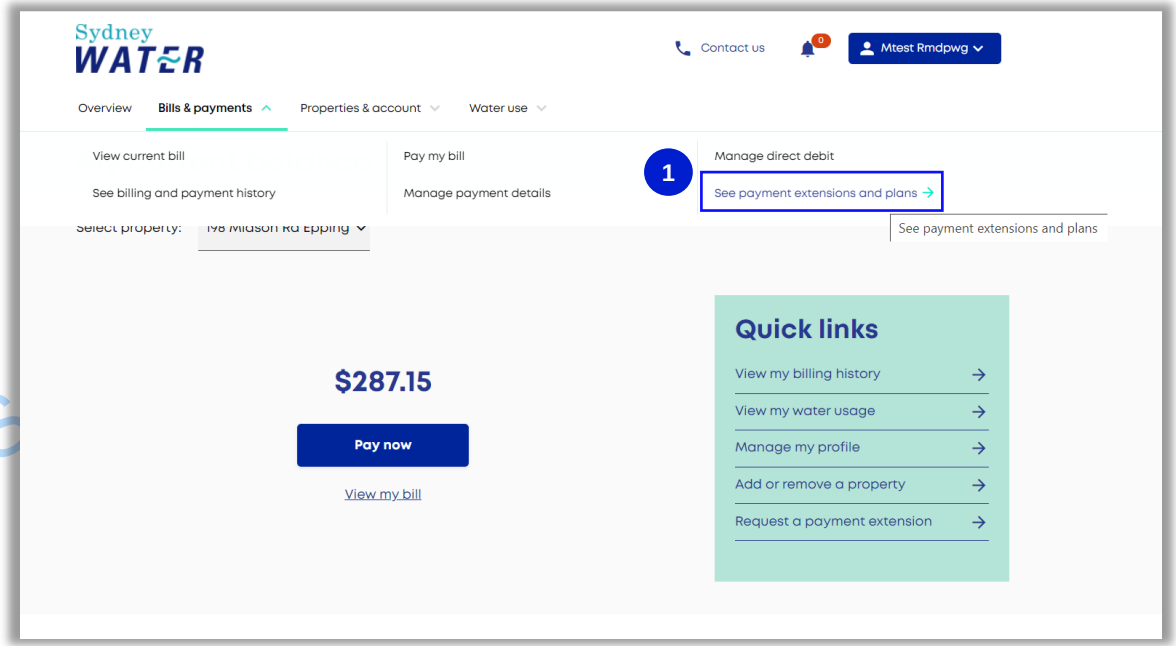
Sydney WATER

Bills & payments: See payment extension and plans (1 of 5)

1. Click the **See payment extensions and plans** option, under the **Billing & payments** module.



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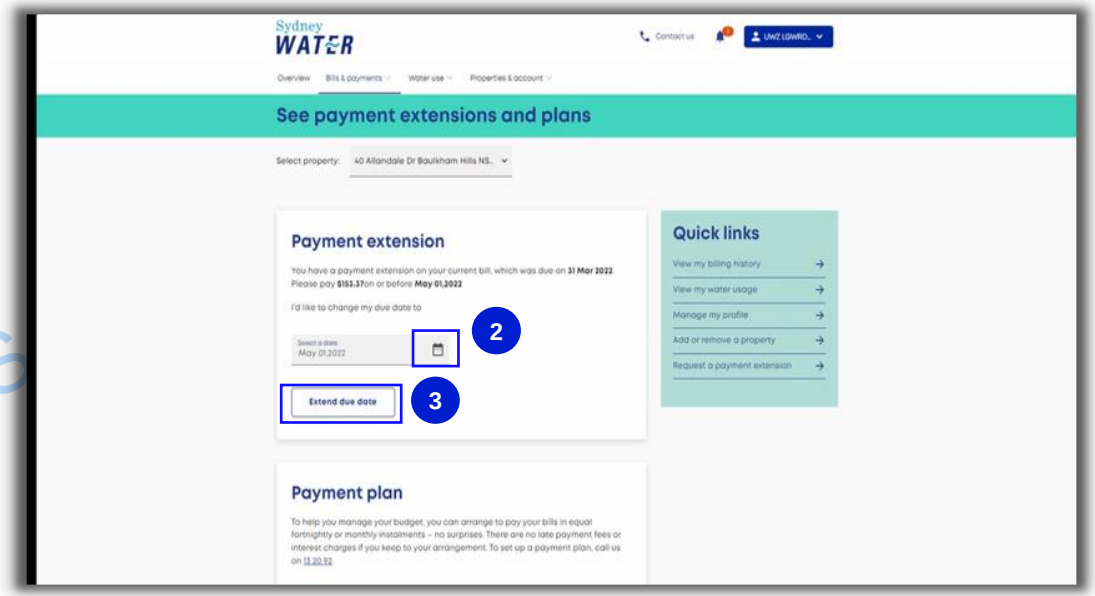
Bills & payments: See payment extension and plans (2 of 5)

The system displays the **See payment extensions and payment plan**.

2. Click the calendar icon to select the desired due date.

3. Click the **Extend due date** button.

Note: Payment extension can be done for up to 35 days.



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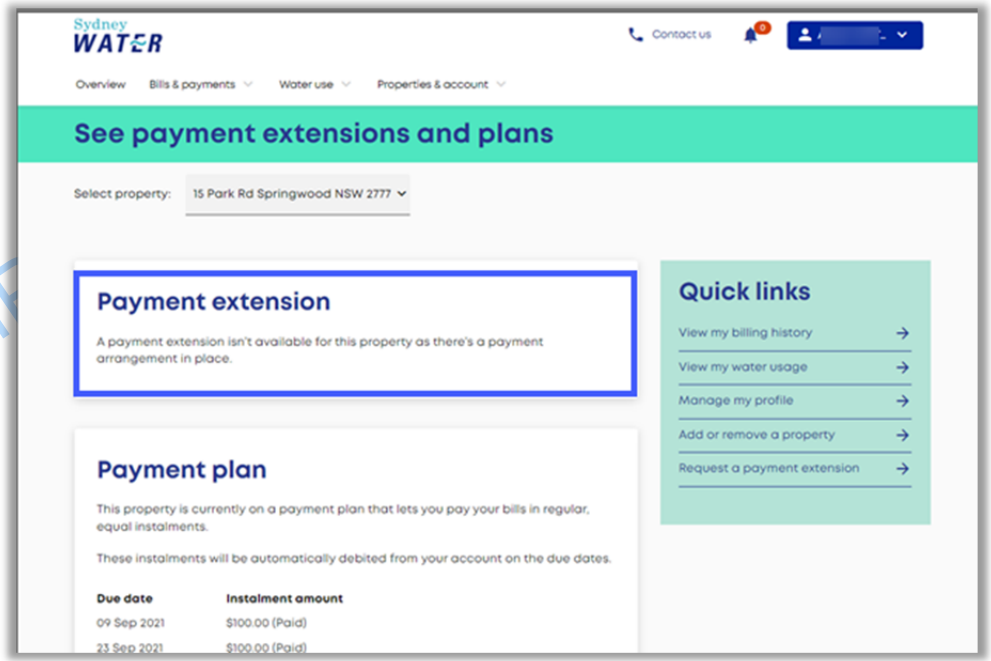
Bills & payments: See payment extension and plans (3 of 5)

There can be three cases when you click Extend due date.

a. If you are not eligible for a payment extension or have any other payment arrangement plan, then the system displays the page as shown here.

- If the customer is already on payment extension, then the system displays the following message:

  "You have a payment extension on your current bill, which was due on <due date>. Please pay <bill amount> on or before <extended date>.



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Bills & payments: See payment extension and plans (4 of 5)

b. If the customer is already on payment extension, then the system displays the following message:

> "You have a payment extension on your current bill, which was due on <due date>. Please pay <bill amount> on or before <extended date>.

DEBLINA'S SAMPLE

Bills & payments: See payment extension and plans (5 of 5)

c. If the customer is eligible for a payment extension and has not yet enrolled for the extension, the system displays the following message:

> "If you know you're going to need more time to pay your current bill of <current bill>, contact us before your payment is due on <bill due date>. You can change your due date by selecting a later date on the calenda."

DEBLINA'S SAMPLE

Learning check (1 of 2)

What are the payment options offered through the Direct Debit program? (Select all that apply.)

- [ ] Credit Card
- [ ] PayPal
- [ ] Bank Account
- [ ] Cheque

DEBLINA'S SAMPLE

Sydney WATER

Learning check (1 of 2)

What are the payment options offered through the Direct Debit program? (Select all that apply.)

- [x] Credit Card
- [ ] PayPal
- [x] Bank Account
- [ ] Cheque

DEBLINA'S SAMPLE

Sydney WATER

Learning check (2 of 2)

Using the payment history tab, a customer can view payment transactions made during the last 3 years.

- ◯ True
- ◯ False

DEBLINA'S SAMPLE

Learning check (2 of 2)

Using the payment history tab, a customer can view payment transactions made during the last 3 years.

- [x] True
- [ ] False

DEBLINA'S SAMPLE

Thank You