eBill – Quickguide

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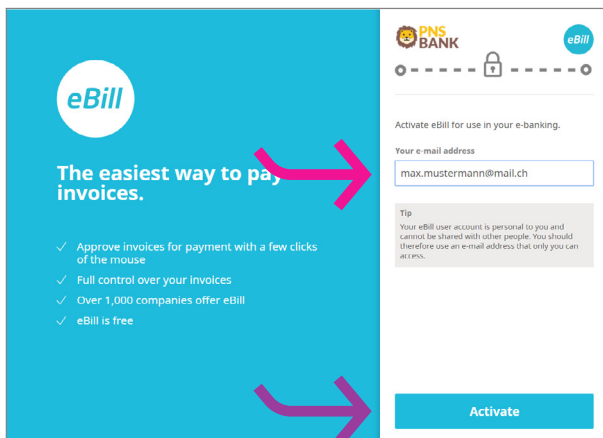
Switch from e-bill to eBill

You are already using "e-bill" and are being switched to "eBill" by your bank? Here's how to do it:
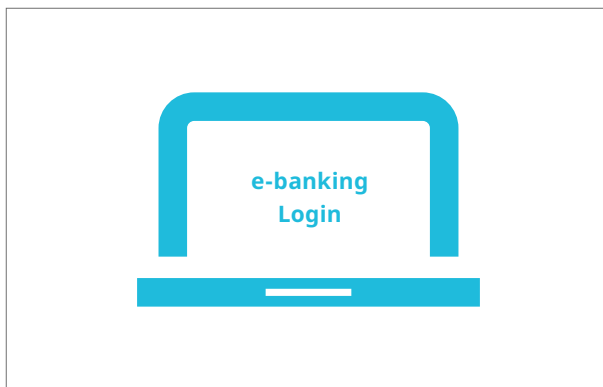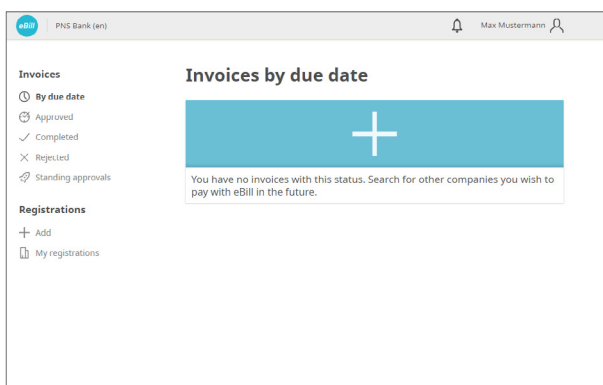

Log into e-banking and in the menu click on "eBill".

If you have stored an e-mail address for e-bill, the address will appear here. If you wish to continue using this **e-mail address** in connection with eBill, click "**Activate**".
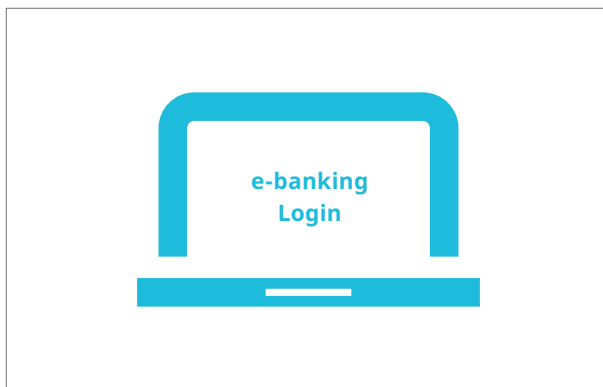
If you wish to save a different e-mail address for eBill or have not yet saved an e-mail address, please follow the instructions in the section "Activate eBill in e-banking" on the next page.

This takes you straight to the new eBill portal, where you are able to process your invoices.

Activate eBill in e-banking

You have not yet registered for "e-bill" or "eBill"? Here's how to do it:

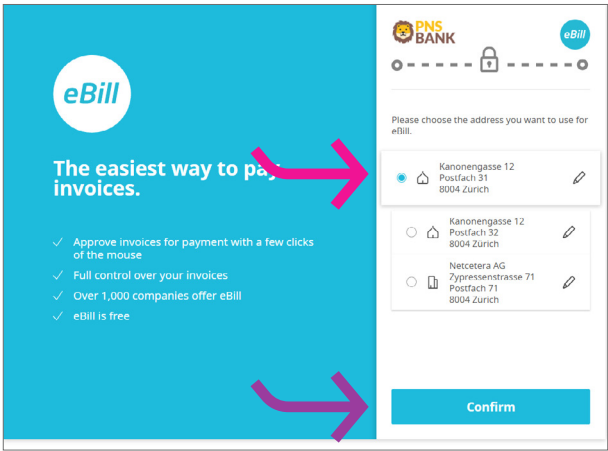Log into e-banking and in the menu click on "eBill".

Enter your **e-mail address** in the dialog window and click on "**Activate**". You will now receive an activation code via e-mail.
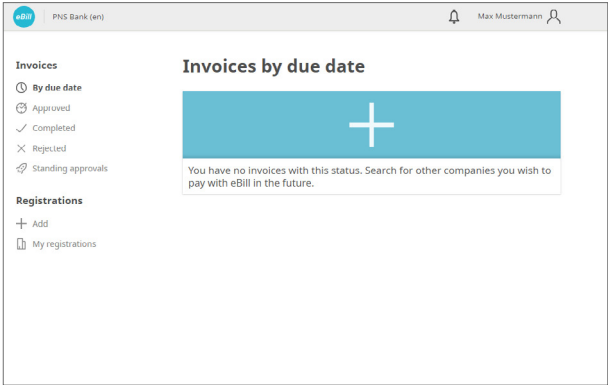

Enter the **activation code** from the e-mail in the dialog window and click on "**Confirm**".
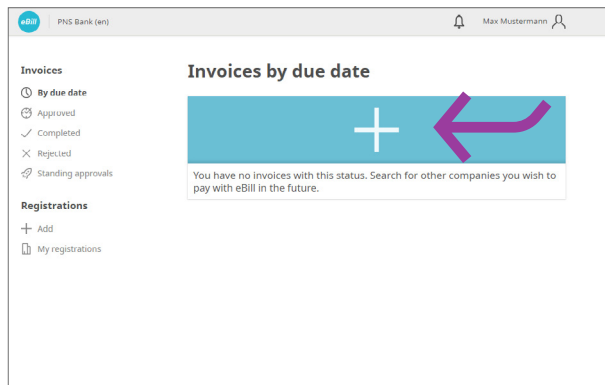
Activate eBill in e-banking

Select the **address** you want to use for eBill and click on "**Confirm**".
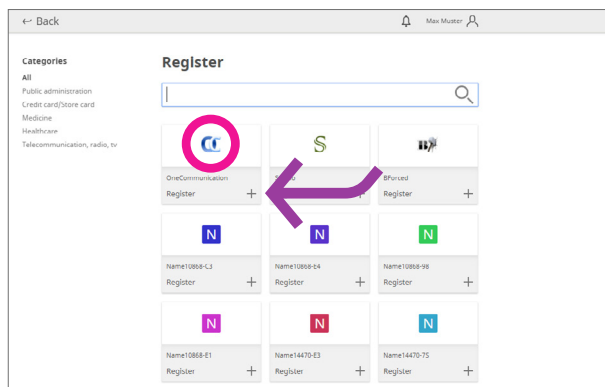

This takes you to the eBill portal and you can register for eBill with your companies.
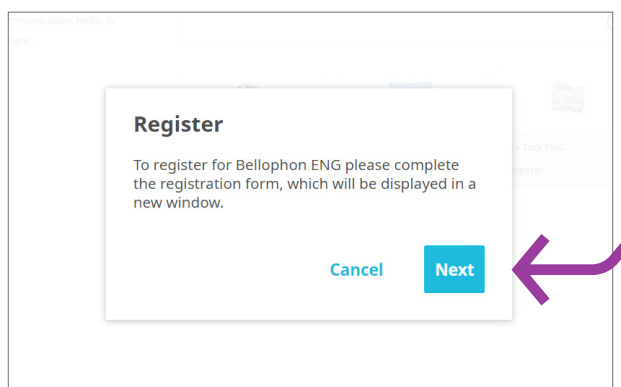
Add companies

To receive invoices from your companies in eBill, please proceed as follows:

On the eBill portal, click on the **+ sign**.

Search for the **company** you want and click on "**Register**".

You will now be redirected to the registration form. Click on "**Next**".

Add companies

Complete the registration form and confirm this by clicking on "**Register**".

You will now receive all future invoices from the selected company in eBill.

Registrations overview

Under "**My registrations**" you can check which billers you have already registered with.

Approve invoice

To approve an invoice, proceed as follows:

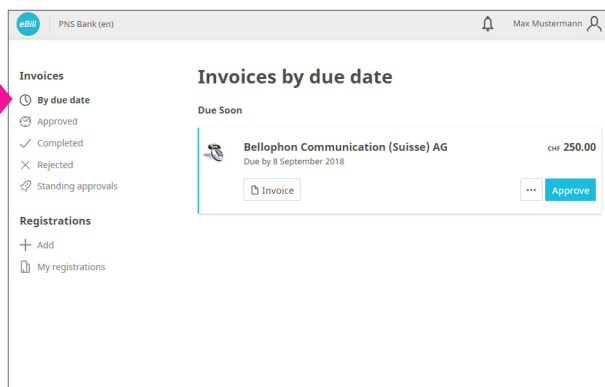On the eBill portal, select the desired invoice under "**Invoices > By due date**", check it and approve it for payment under "**Approve**".
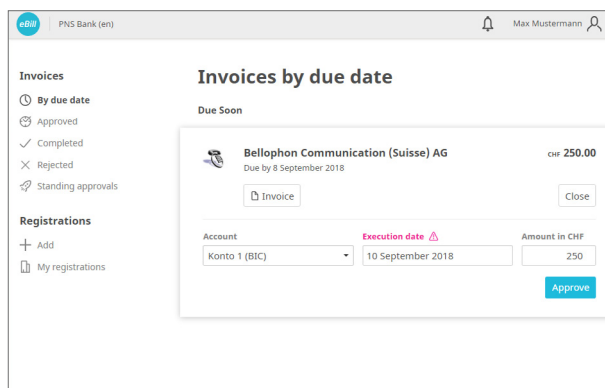
You can now double-check the details and change them if necessary. Click on "**Approve**" to approve the invoice for payment.
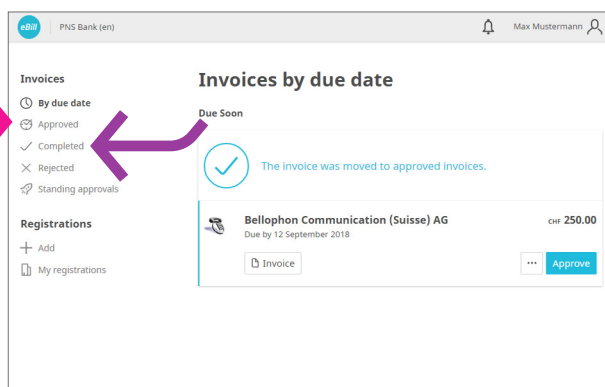
The approved invoice will be moved to the folder "**Invoices > Approved**". You can, however, make changes directly in e-banking under pending payments until the payment has been finally completed.

Once payment has been finalized, the invoices are moved to the folder "**Invoices > Completed**".

Reject invoice

To reject an invoice, please proceed as follows:
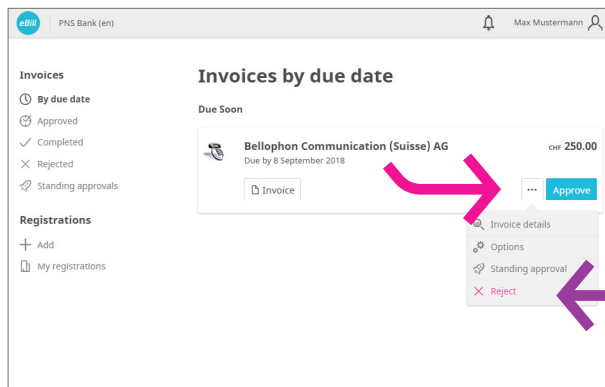
On the eBill portal, click on the "**Options**" button for the invoice you wish to reject, then select "**Reject**".

Once an invoice is rejected, it will be moved from "**By due date**" to "**Rejected**".

Set up standing approval

Standing approval automates the approval of your invoices. To set up a standing approval, take the following steps:
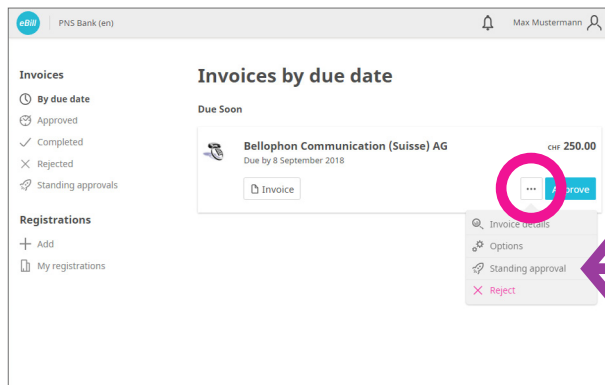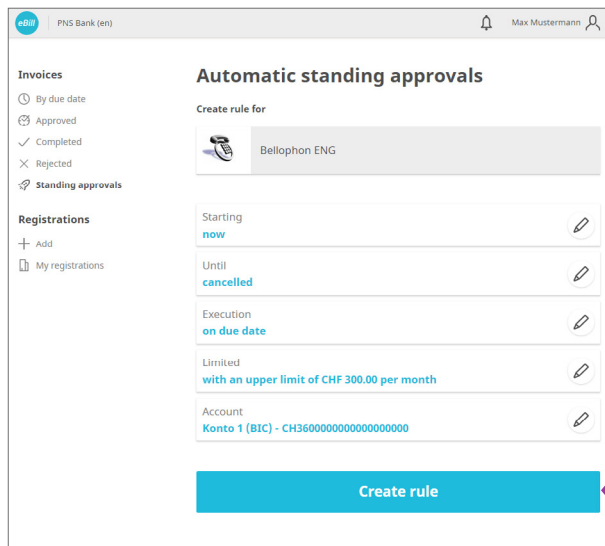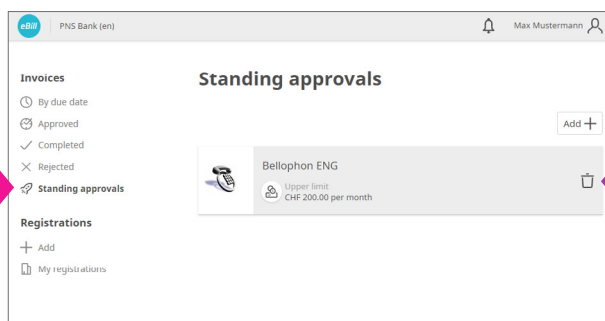

To do this, select the invoice for which you want to automate approval in future. First click on the "**Options**" button, then select the option "**Standing approval**".


Next, define the rules for the standing approval and confirm these by clicking on "**Create rule**".

You can **change** or **delete** automatic approvals at any time by clicking on the entry under "**Invoices > Standing approvals**".

Set up payment in instalments

If a company offers you the option of paying your bill in instalments, you will receive a notification to this effect on the eBill portal. To select the payment method, proceed as follows:
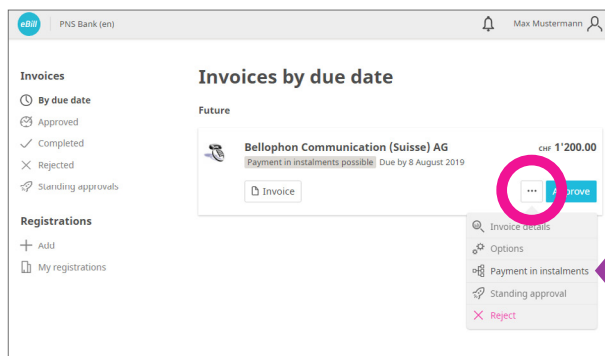

When you are in an invoice, go to the "**Options**" button and select the option "**Payment in instalments**". You can then select an instalment group from the options offered.
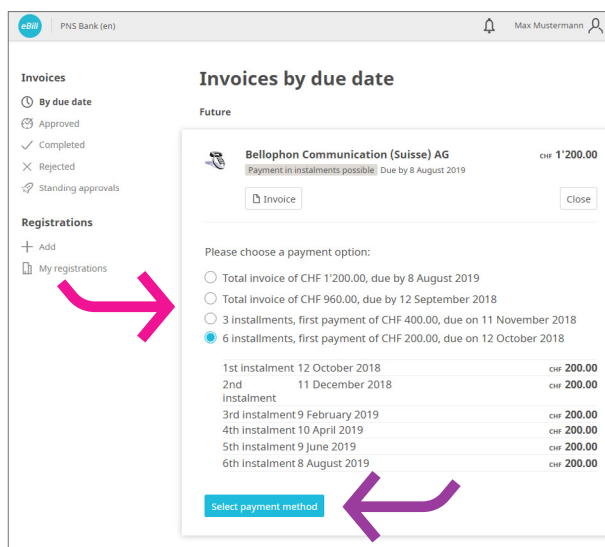
An instalment group contains one or more instalments. Select an **instalment group**. Click on "**Select payment method**".

The invoice overview now shows you all instalments belonging to the selected instalment group as normal individual payments.
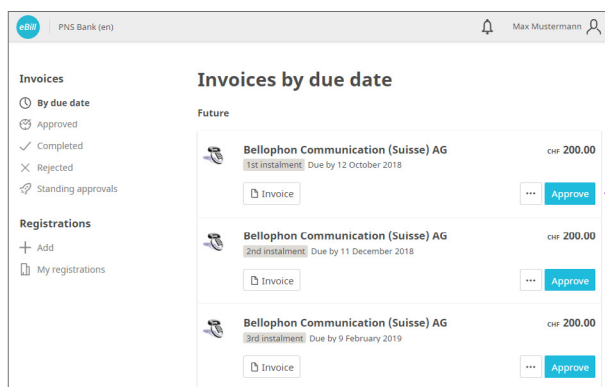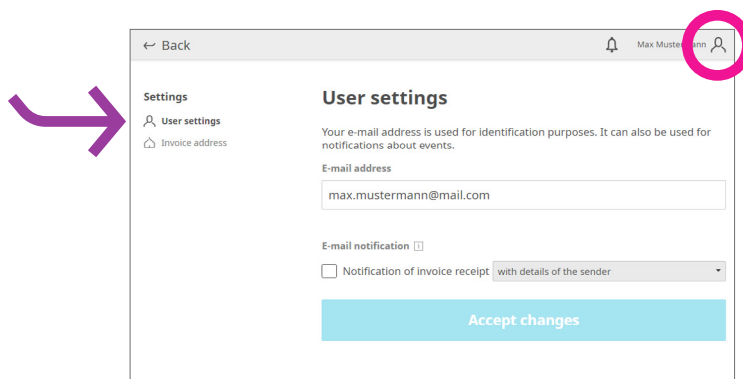

You can now **approve** each instalment individually.

Make changes to an approval

Once you have approved an invoice for payment on the eBill portal you are unable to make any further adjustments. You can, however, make changes directly in e-banking under pending payments until the payment has been finally completed.

Change eBill settings

Click on the ⚇ symbol to make changes to your user settings.
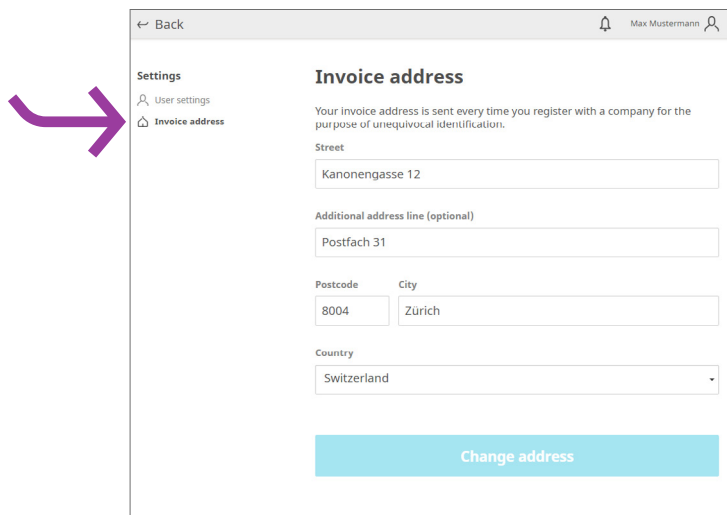
Under "**User settings**" you can change your e-mail address and activate eBill notifications.

Under "**Invoice address**" you can make changes to your invoicing address.

Contact

Please contact your bank directly if you have any questions about eBill in e-banking.
More information on eBill can be found at www.ebill.ch.