eBill – Quick Guide

eBill

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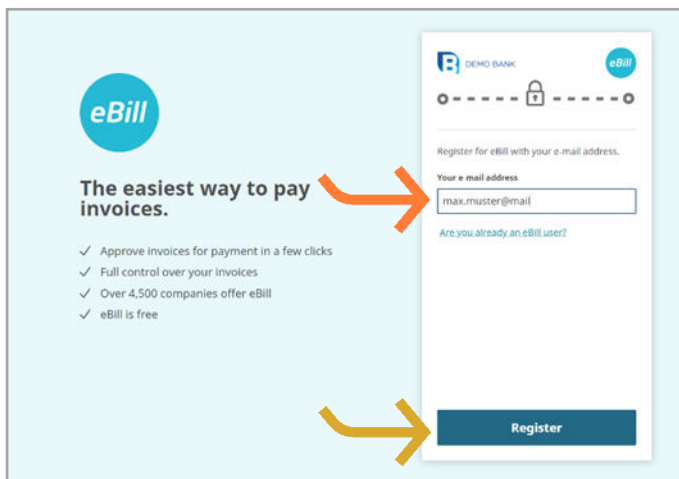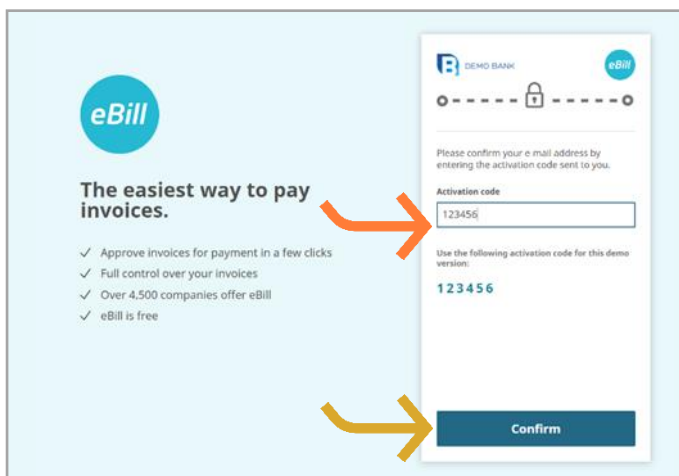# Activating eBill in Online Banking

You have not yet registered for eBill? You can do it by following these steps:
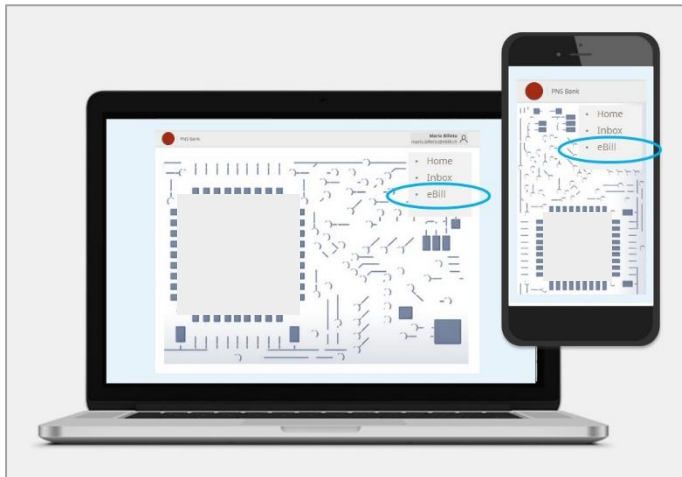
Log in to your bank's online banking and click on "**eBill**" in the menu.

In the dialog box, please enter your **e-mail address** and click on "**Register**". You will now receive an activation code by e-mail.
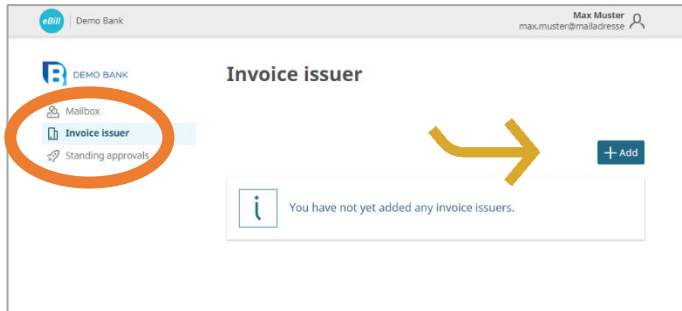

Enter the **activation code** from the e-mail you received earlier in the dialog box and click on "**Confirm**".
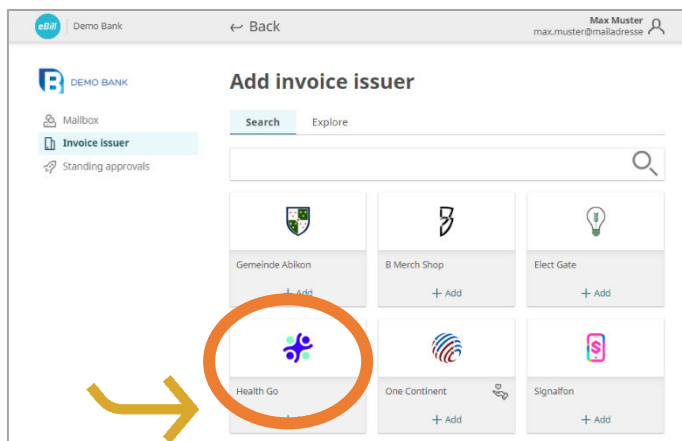
You will now be redirected to the eBill Portal and will be able to subscribe for eBill to your invoice issuers.

Adding Invoice Issuers Manually

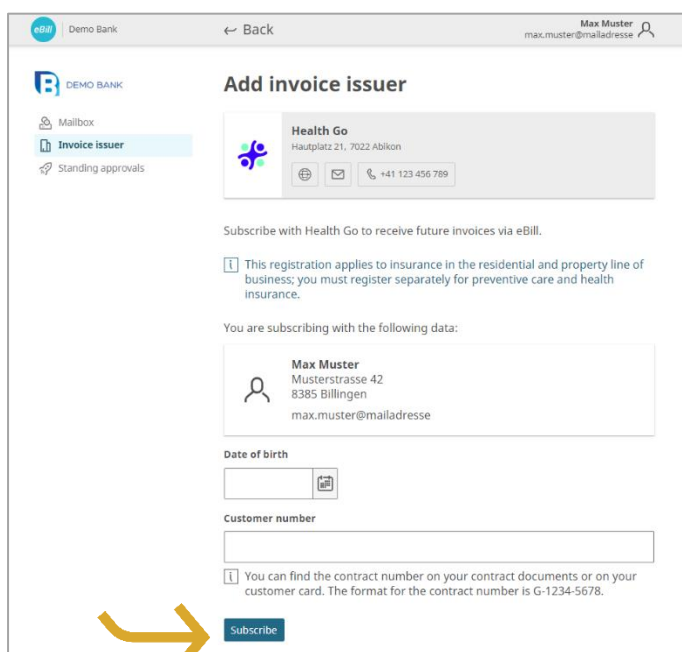To receive invoices from your invoice issuers via eBill, follow these steps:

In the eBill Portal, click on the **Invoice issuer** menu item and then on the "**Add**" button.

Search for your desired **invoice issuer** and click on "**Add**".

Verify the data you wish to use in order to subscribe to the invoice issuer.

If necessary, fill in the additional identification details and click on "**Subscribe**".

Adding Invoice Issuers Automatically

Save yourself the trouble of adding invoice issuers manually and activate the "Add invoice issuers automatically" function. To do that, proceed as follows:
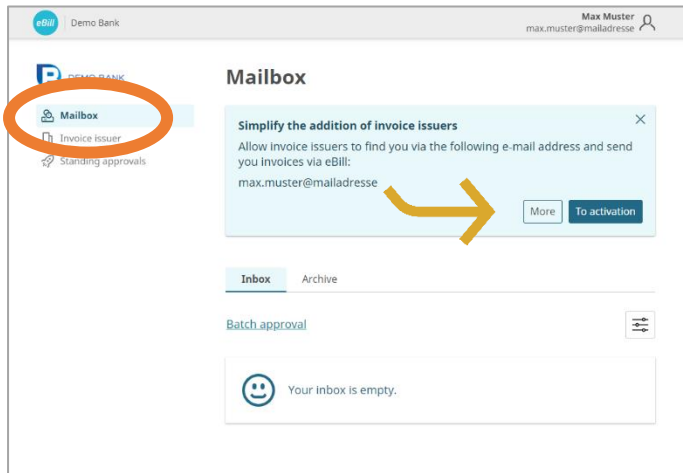
For a new eBill user, the information about a simplified addition of invoice issuers is displayed as a notification in the **Mailbox**.

Click on "**To activation**" to enable this function.
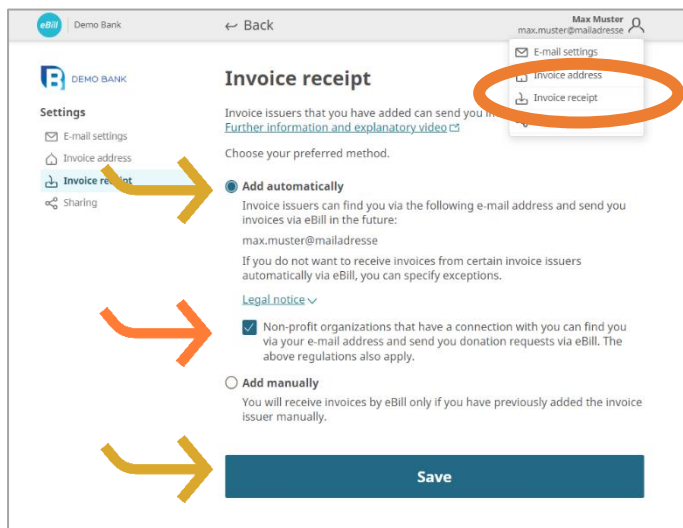
You can adjust your preferred settings for receiving invoices under "**Invoice receipt**".

You can also enable this feature for **non-profit organizations** if you wish.

Read the legal notice carefully and click on "**Save**" to update the settings.

Overview of Added Invoice Issuers

To get an overview of your added invoice issuers, proceed as follows:
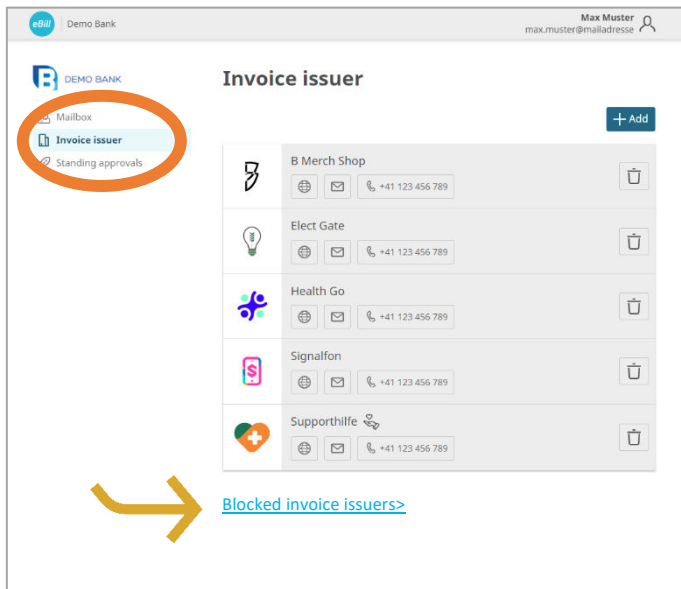
You can see which invoice issuers you have already subscribed to by going to the "**Invoice issuer**" menu item.

If you want to block certain invoice issuers and exclude them from the "Add invoice issuers automatically" function, you can select them under "**Blocked invoice issuers**".
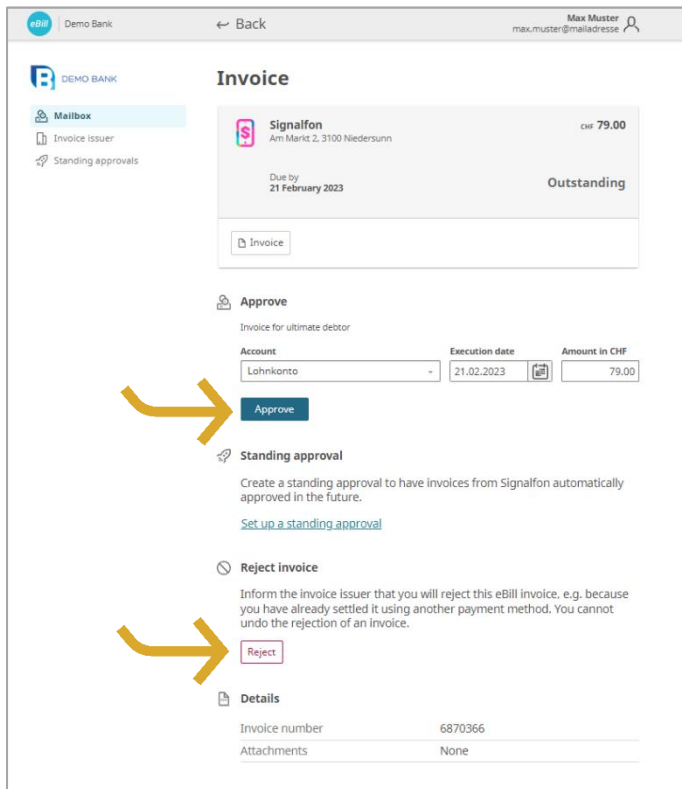
Approving or Rejecting Invoices

To approve an invoice, proceed as follows:
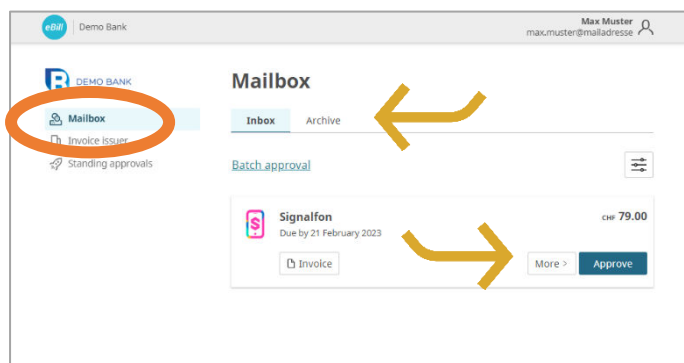
All open invoices are displayed in the "**Inbox**" folder in the eBill Portal **Mailbox**.
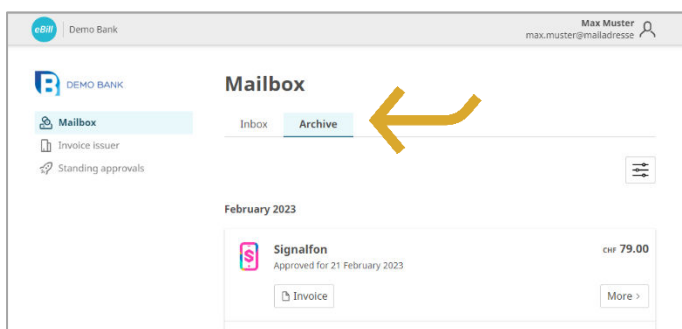
Select the desired invoice. You can pay it with one click by using the "**Approve**" button

You can verify the invoice details again and adjust them if necessary by going to "**More**".

By clicking on "**Approve**", you can release the invoice for payment.

If you want to reject an invoice, click on "**Reject**".

The approved or rejected invoices are moved to the "**Archive**" folder.

Making Changes to an Approval

Once you have approved an invoice for payment in the eBill Portal, you can no longer modify it.

After the invoice has been approved, changes can be made only until the final execution of the payment directly in the online banking, in pending payments.

Setting up a Standing Approval

You can use standing approvals to automate the approval of your invoices.
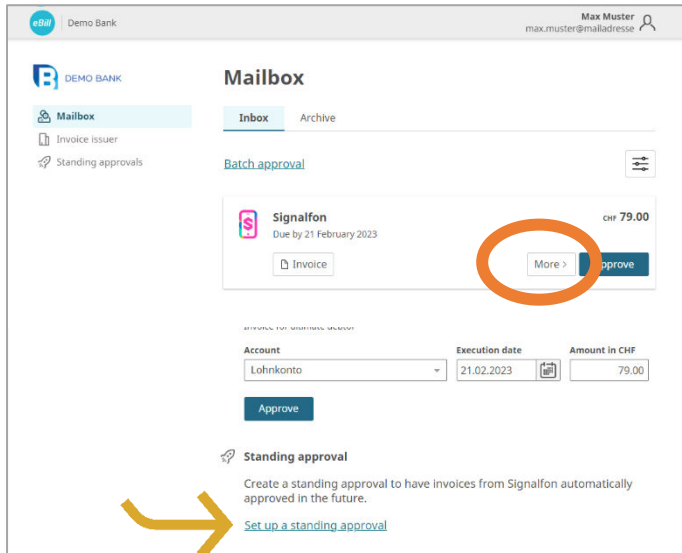
If you wish to automate the approval of an invoice in the future, click on "**More**" and select the "**Set up a standing approval**" option.
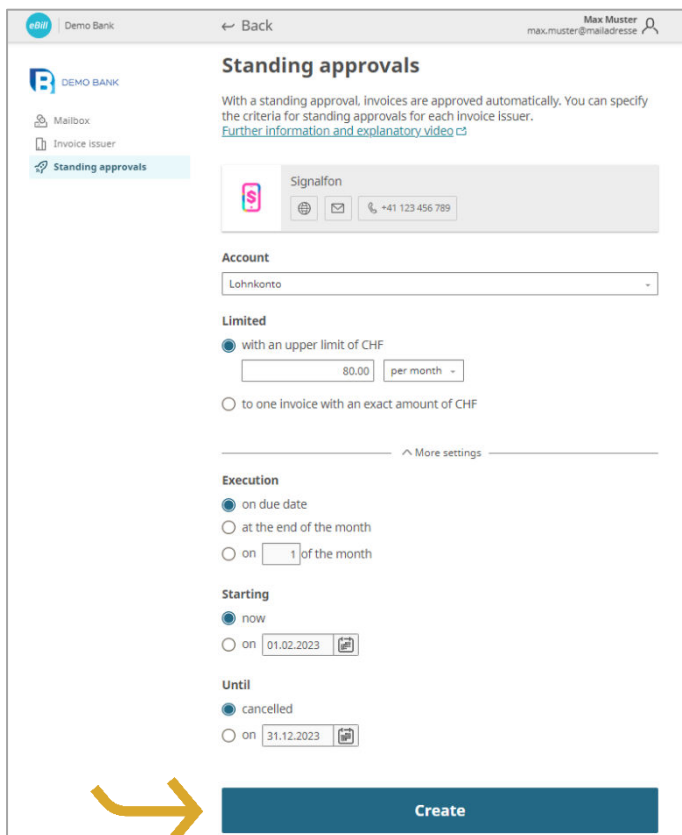
You can then set the rules for the standing approval and confirm them by clicking on "**Create**".

You can adjust the following settings:

- Debit account
- Upper limit of the invoice amount
- Approval date rules

After an automatic standing approval has been created, you can change or delete the settings at any time.

Processing Installment Payments

If an invoice issuer offers you the option of paying your eBill invoice in installments, you will receive a notification to this effect in the eBill Portal. To select the payment method, proceed as follows:
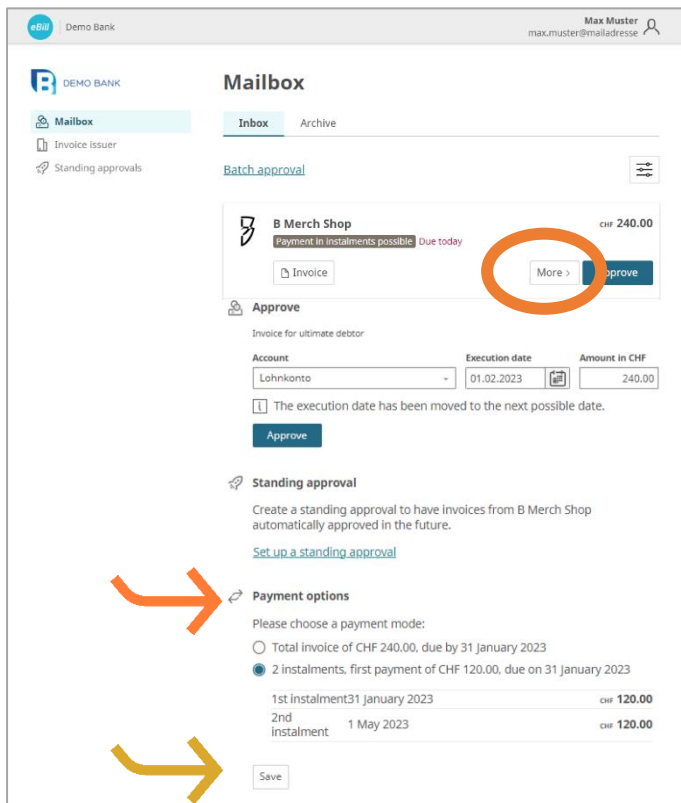
Click on "**More**". You can then choose from several payment modes.

Under "**Payment options**", you can see various payment modes. You can choose one or more installments.

Click on "**Save**" to confirm the payment method.
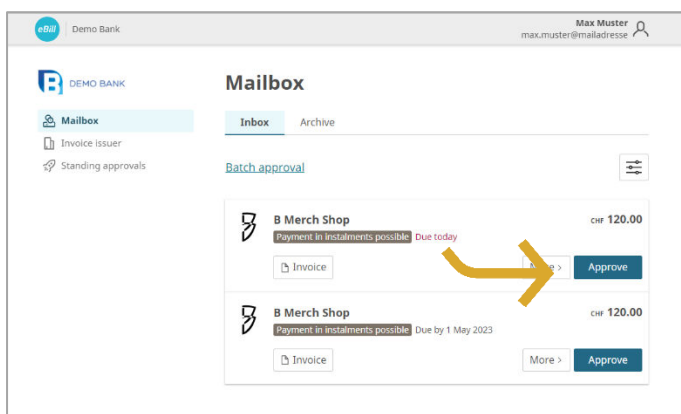
In the invoice overview, all installments of the selected installment group are now displayed to you like regular individual invoices.

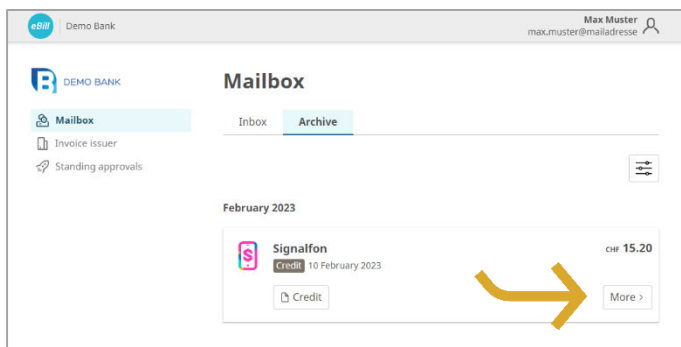Now you can "**Approve**" each installment individually.

Notification and Credit

Notification and credit allow the invoice issuer to send you important information without triggering a cash flow.

Notifications do not involve any cash flow. You receive them for information purposes only.

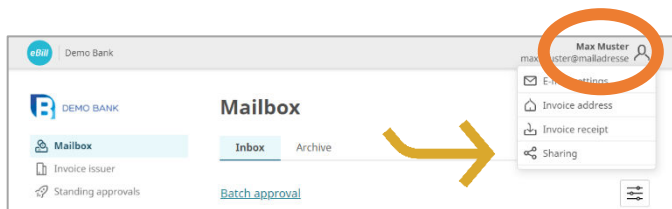Click on "**File**" to move the notification to the "**Archive**" folder.

Credits do not involve any cash flow. You receive them for information only.

Click on "**More**" or the credit file for more details.

eBill Sharing

eBill Sharing offers you the possibility of managing invoices together with other eBill users. In order to activate this feature, follow these steps:


Click the **settings icon** in the upper right corner. Click on "**Sharing**" in the menu list.
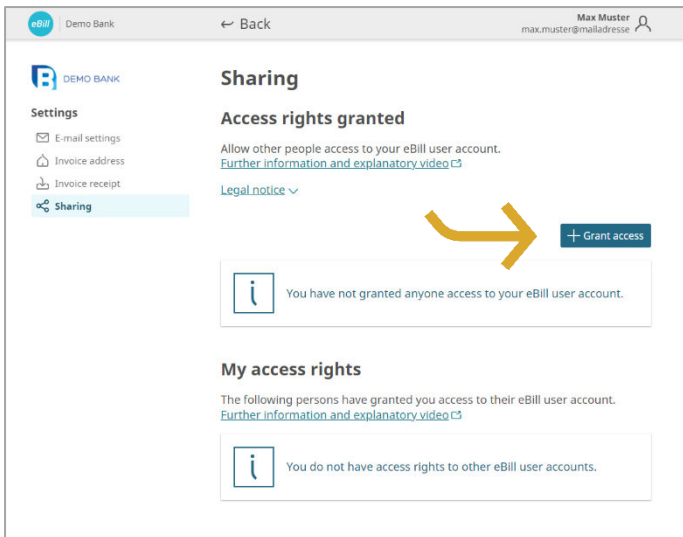
In the Sharing overview, you can see granted and received sharing rights.

To grant a new sharing right, click on the "**Grant access**" button.

After entering the e-mail address of the sharing partner and confirming the legal notice, the person to be authorized will be informed about the new sharing invitation by e-mail.
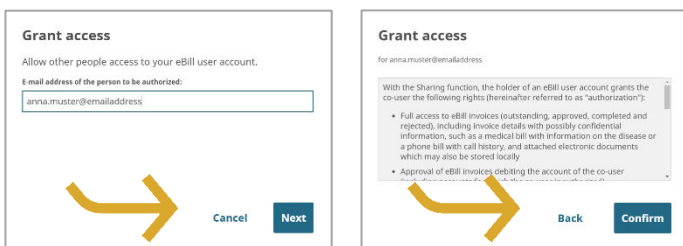

After accepting the invitation, the authorized person can approve or reject invoices from you as well as subscribe you to — or unsubscribe you from — invoice issuers.
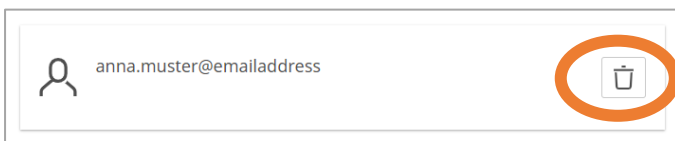
Granted and received access rights can be deleted at any time. To do this, click the **trash can icon**.

eBill Donations — Making Donations via eBill

With eBill Donations, you can support charities by means of digital donations.
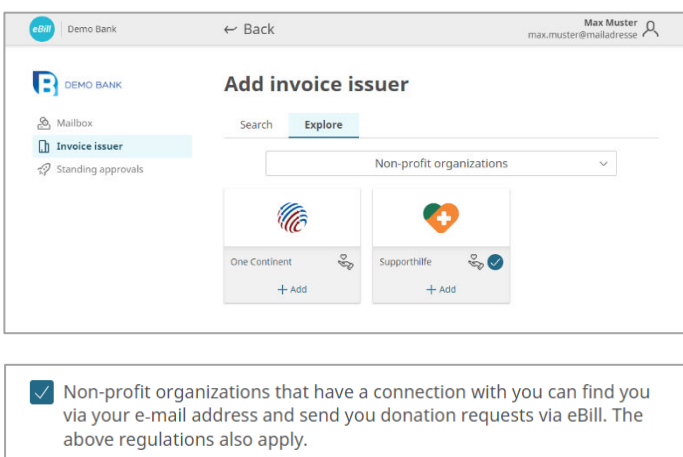
In order for a non-profit organization (NPO) to send you donation requests, it is necessary that you add it under the "**Invoice issuer**" menu item.
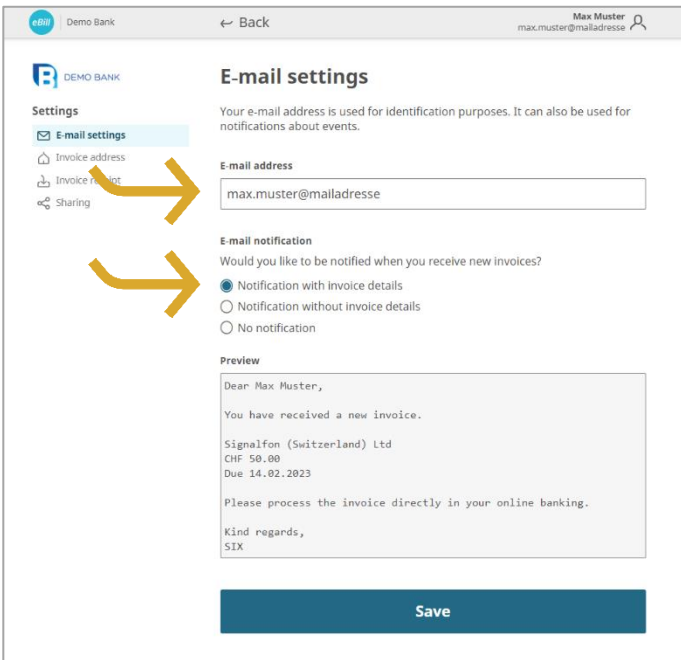
Save yourself the trouble of adding invoice issuers manually and activate also NPOs by using the 'Add invoice issuers automatically' function.

Changing eBill Settings

Click on the settings icon in the upper right corner to change your user settings.
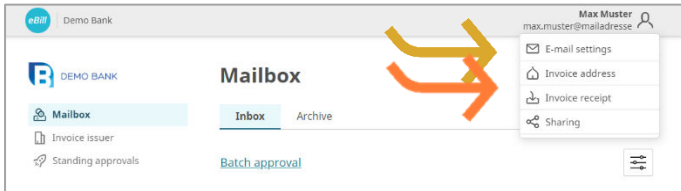
You can change your e-mail address and configure notifications for eBill by going to "**E-mail settings**".

The **e-mail address** serves as personal identification in the eBill Portal.

By enabling the **e-mail notification**, you will receive a notification when you receive a new invoice in the eBill Portal.
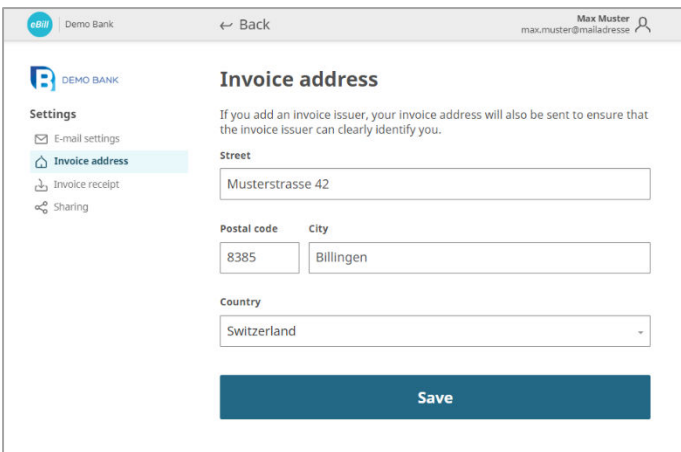
You can edit your address under "**Invoice address**". Based on this information, invoice issuers are able to identify you.

Contact

Please contact your bank directly if you have any questions regarding eBill in online banking. For more information on eBill, visit www.eBill.ch