



# Make a Recurring Loan Payment Through QuickPay

Use our online portal to make fast,  
secure payments in a few simple clicks.

---

Refer to this document to learn how to:

## **LOG IN TO ONLINE TELLER**

Page 2

## **SET UP RECURRING PAYMENTS**

Pages 3-6

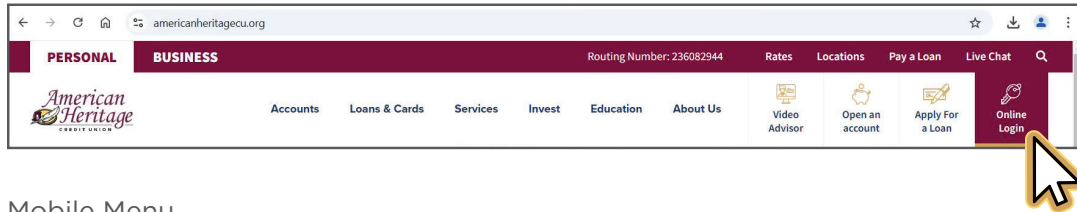
## **CANCEL A RECURRING PAYMENT**

Page 7

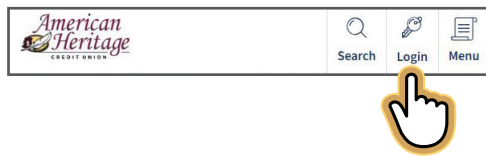
# LOG IN TO ONLINE TELLER

1. Visit **AmericanHeirtageCU.org** and select **Online Login** or **Login** from the menu.

## Desktop Menu



## Mobile Menu



2. If you have not signed up for Online Teller yet, select **Register**. **Check the box** to accept the terms of this agreement. Then, follow the prompts to create your **User ID** and **Password**.

A screenshot of the American Heritage Credit Union login and registration page. It has a white background with the credit union's logo at the top. Below the logo are input fields for 'User ID' and 'Password', followed by a red 'LOG IN' button. Below the button is a link for 'Forgot Password?'. At the bottom, there are links for 'Register', 'Supported Browsers', 'Privacy Policy', 'Disclaimer', and 'Sign In Problems FAQ'. A yellow mouse cursor is pointing at the 'Register' link.

You will need your **Member Number** to create an Online Teller Account.

Where to find Your American Heritage Member Number:

- a. Your loan documents.
- b. Your membership card that was included in your Welcome Kit upon joining the credit union.

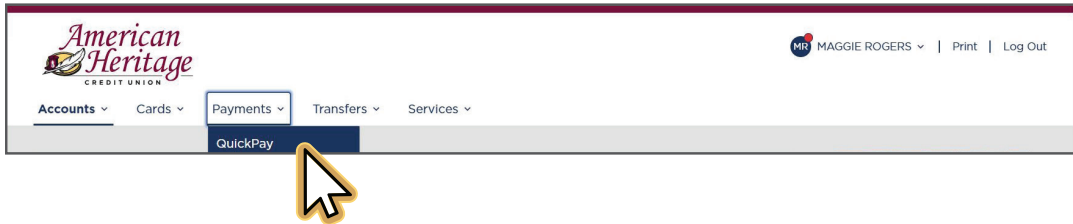
3. Log In to Online Teller by entering your **User ID** and **Password**, then select **Log In**.

A screenshot of the American Heritage Credit Union login page. The 'User ID' field contains the text 'Sample' and the 'Password' field contains a series of 'X' characters. Below the password field is a red 'LOG IN' button. Below the button is a link for 'Forgot Password?'. At the bottom, there are links for 'Register', 'Supported Browsers', 'Privacy Policy', 'Disclaimer', and 'Sign In Problems FAQ'. A yellow mouse cursor is pointing at the 'LOG IN' button.

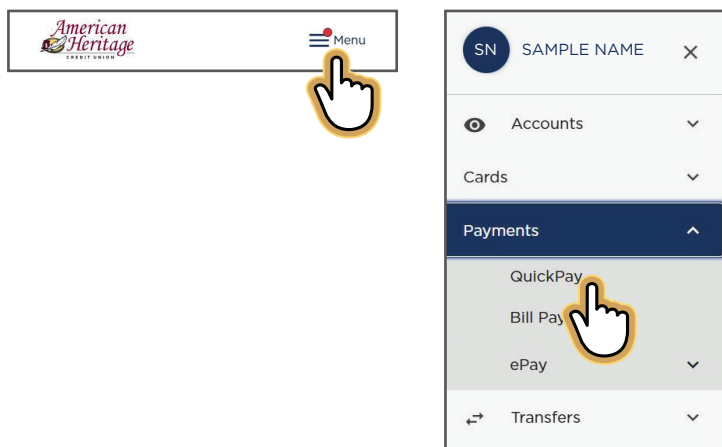
# MAKE A RECURRING PAYMENT

4. **Log in to Online Teller** and navigate to **Payments** in the menu and select **QuickPay**.

Desktop Menu



Mobile Menu



5. **Verify Your Identity** via the Email or Mobile Number associated with your account.

A screenshot of the 'Verify Your Identity' screen. It features two radio button options: 'Email (\*\*\*\*\*@xxxx)' and 'Text (xxx-xxx-7575)'. The 'Text' option is selected. Below the options is a 'Send Passcode' button. At the bottom, there is a note: 'Invalid contact details shown? Please call us at 800.342.0008 for assistance.'

6. If prompted, **Enroll** in our QuickPay service.

A screenshot of the 'Welcome to QuickPay!' screen. The screen has a progress bar at the top with three steps: 'Welcome to QuickPay', 'Account Setup', and 'Review'. The main content area lists features: 'Schedule and manage payments and view payment history', 'Manage payment methods', 'Manage your notification preferences', and 'Setup Pay By Text'. It also says 'You are only a few steps away! Start today by clicking the Continue button.' At the bottom, there is a 'Continue' button highlighted by a yellow mouse cursor icon.

- On the Welcome Screen, select **Continue** to start the enrollment process.
- Review the Terms of Service Agreement and **check the boxes** to e-sign.
- View your customer details on the **Account Setup** Screen, select **Continue** to review.
- Review** Account Information and select **Continue** to finish the enrollment process.

7. The **Account Summary** page includes two locations to set up recurring payments. Navigate to **Payment Actions** or **I would like to...** and select **Set Up Recurring Payments**.

The screenshot shows the 'Account Summary' page with tabs for 'Account Summary', 'Alerts', and 'Profile'. Below the tabs, there is a section for 'Details for Account' with fields for 'Current Due Date', 'Current Statement Balance Amount', 'Last Payment Date', 'Last Payment Amount', and 'Confirmation Number'. To the right of these fields is a 'Pay By' section with a 'Set Up New' button. Below the 'Details for Account' section, there is a 'Schedule One Time Payment' button and a 'Payment Actions' dropdown menu. The 'Payment Actions' menu is open, showing options: 'Set Up Recurring Payments' and 'Set Up Pay By Text'. A yellow arrow points to the 'Set Up Recurring Payments' option.

OR

The screenshot shows the 'Account Summary' page with the same tabs and details as the previous image. Below the 'Details for Account' section, there is a 'Schedule One Time Payment' button and a 'Payment Actions' dropdown menu. The 'Payment Actions' menu is open, showing options: 'Set Up Recurring Payments' and 'Set Up Pay By Text'. A yellow arrow points to the 'Set Up Recurring Payments' option.

8. Select **Payment Method**, and select **New Bank Account** or **New Card Account**.

The screenshot shows the 'Set Up Recurring Payments' form. It has a title bar with a close button. Below the title bar, there is a section for 'Please enter the details of the Recurring Payment you want to set up below.' The form contains the following fields: 'Account Number:', 'Payment Method:' (a dropdown menu with '- Select -' selected), 'Payment Start Date:' (a date picker), 'Payment Frequency:' (a dropdown menu with '- Select -' selected), a checkbox for 'I want to fix the number of payments that will be processed.', 'Payment Amount:' (a dropdown menu with '\$' selected), and 'Payment Limit (Optional):' (a text input field with '\$' entered). At the bottom of the form, there are 'Continue' and 'Cancel' buttons. A yellow arrow points to the 'Payment Method:' dropdown menu.

Payment Method Options

The screenshot shows the 'Payment Method Options' dropdown menu. It has a title bar with a close button. Below the title bar, there is a section for 'Payment Method:' with a dropdown menu. The dropdown menu is open, showing options: '- Select -', 'New Bank Account', and 'New Card Account'. A yellow arrow points to the 'New Bank Account' option.

9. Fill out the form to enter the information for the Bank Account or Card Account you will be using for recurring payments. Select **Save** to add the account as your payment method.

Add New Bank Account

Name on Account:

Account Type:

- Select -

Personal or Commercial?:

- Select -

Routing Number:

What is this?

Account Number:

What is this?


Re-Enter Account Number:

Save

Cancel

## Add New Card Account

Name on Card:

Card Number:  


Expiration Date:

Card Security Code:  
What is this?

**Address Details**

Address Line 1:

Address Line 2 (Optional):

City:

State:  
Pennsylvania▼

Zip:

Save changes Cancel

Set Up Recurring Payments

Please enter the details of the Recurring Payment you want to set up below.

Account Number:

Payment Method:

Bank Account 0000

Payment Start Date:

00/00/20XX

Payment Frequency:

Monthly

☐ I want to fix the number of payments that will be processed.

Payment Amount:

\$000.00

Payment Limit (Optional):

\$

Continue

Cancel

### Payment Frequency Options

Payment Frequency:

- Select -

Weekly

Monthly

Bi-Weekly

### Payment Amount Options

Payment Amount:

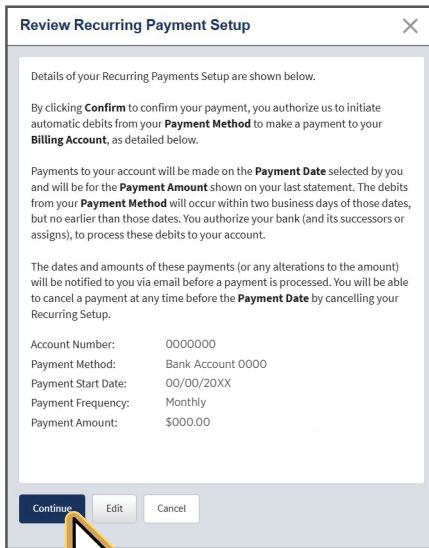
**Current Statement Balance Amount**

This is Current Statement Balance based on your statement

**Please enter Payment Amount**

Please enter Payment Amount

11. You will be brought to a **Review Recurring Payment Setup** screen. After reviewing the information for accuracy, confirm the recurring payment by selecting **Continue**.



**Review Recurring Payment Setup** [X]

Details of your Recurring Payments Setup are shown below.

By clicking **Confirm** to confirm your payment, you authorize us to initiate automatic debits from your **Payment Method** to make a payment to your **Billing Account**, as detailed below.

Payments to your account will be made on the **Payment Date** selected by you and will be for the **Payment Amount** shown on your last statement. The debits from your **Payment Method** will occur within two business days of those dates, but no earlier than those dates. You authorize your bank (and its successors or assigns), to process these debits to your account.

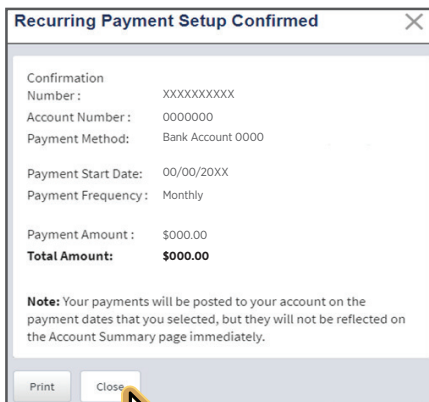
The dates and amounts of these payments (or any alterations to the amount) will be notified to you via email before a payment is processed. You will be able to cancel a payment at any time before the **Payment Date** by cancelling your Recurring Setup.

Account Number:	0000000
Payment Method:	Bank Account 0000
Payment Start Date:	00/00/20XX
Payment Frequency:	Monthly
Payment Amount:	\$000.00

**Continue** **Edit** **Cancel**

A mouse cursor is pointing at the **Continue** button.

12. Upon completion, you will see the **Recurring Payment Setup Confirmed** screen, which will include a **Confirmation Number** along with the details of your recurring payment. You can choose to **Print** the information or **Close** the window.



**Recurring Payment Setup Confirmed** [X]

Confirmation Number:	XXXXXXXXXX
Account Number:	0000000
Payment Method:	Bank Account 0000
Payment Start Date:	00/00/20XX
Payment Frequency:	Monthly
Payment Amount:	\$000.00
<b>Total Amount:</b>	<b>\$000.00</b>

**Note:** Your payments will be posted to your account on the payment dates that you selected, but they will not be reflected on the Account Summary page immediately.

**Print** **Close**

A mouse cursor is pointing at the **Close** button.

# CANCEL A RECURRING PAYMENT

13. If you wish to cancel a recurring payment that has been set up, scroll to the bottom of your Account Summary page and find **Automated Payment Setups** and select the **Cancel Button (X)**.

Automated Payment Setups			
Confirmation Number	Payment Method	Amount Type	Total Amount
XXXXXXXXXX	Bank Account 0000	Recurring	\$000.00



You will be asked if you wish to cancel the recurring payment setup. Select **Yes, Cancel It** or **No, Keep It**.

After selecting **Yes, Cancel It**, a **confirmation message** that you have **Successfully Deleted Recurring Setup** will appear.