# **INSITE** Documentation



# Member Help

### Create a member account

1. Select an application link from the InSite homepage. For most applications, the Login page loads. If not, click the **Login** link.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Login					
		Email:			
		Password:			
			Lo	g In	
		Create an Acc	ount   Password Re	covery	

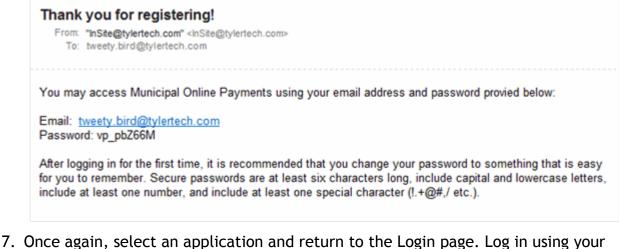
2. From the Login page, click the **Create an Account** link. The Create Member Account page loads.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Create	Member Account				
			weety Bird		
		ex	: "Joe Smith"		
		Email 🗚	eety.bird@tylertech.	com	
		Password w	ill be emailed to you		
			Create Mem	ber Cancel	

- 3. Type your information in the **Name** and **Email** fields. Your email address is your login ID and is used for password recovery or for confirmation of any activity on the site.
- 4. Click **Create Member**. The following message displays:

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Create Member Account					
		The acc created. password	sistration Comple ount has been su . An email conta has been sent to ddress you enter	iccessfully ining your o the email	

- 5. Click **Continue** to return to the InSite homepage.
- 6. Check your email to find the confirmation message that contains your password.



7. Once again, select an application and return to the Login page. Log in using your email address and the password found in the confirmation email. After logging in, you can change your password. (See <u>Edit your member information</u> for instructions.)

### Log in

1. Click the link for the application you want to access. For some applications you are redirected to the Login page. For other applications you must click the **Login** link. The Login page loads.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Login					
		Email:	tweety.bird@tylertech	n.com	
		Password:	•••••		
			Log	g In	
		Create an Ac	count   Password Rec	covery	

- 2. Enter your email address and password then click **Log In**. If this is your first time logging in, use the password from the confirmation email you received.
- 3. If you typed your login information correctly, you are directed to the application you selected. If you typed your email address or password incorrectly, the following message displays:

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Login					
			login using the sword you ente		
		Email: t	weety.bird@tylertech	n.com	
		Password:			
			Log	g In	
		Create an Acc	ount   Password Rec	covery	

If you mistyped your email address or password, try logging in again. If you forgot your password, use the **Password Recovery** link to have your password emailed to you.

After five consecutive failed attempts to log in, your member account is locked until an administrator unlocks the account. This feature is in place to protect your account from hacking attempts and potential identity theft.

# Edit your member information: Name, Email, and Password

1. From any application page, click the **Member Profile** link. The Member Profile page loads with the **Member Information** tab selected. If you are not logged in, you are prompted to log in before you can continue.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Memb	er Profile				
		ryment formation		twe	reety Bird ety.bird@tylertech.com <u>mber Profile</u>   <u>Logout</u>
Emai Phor	e Tweety Bird I tweety.bird@tylertech. ne Number 135-792-6480 word			= <u>Co</u>	ed Help? <u>ontact Us</u> 06) 7-MEMBER
				Ann	nber Iouncements BAR HERE

2. On the **Member Information** tab, click the <u>edit</u> link. The Edit Member Information page loads.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Membe	er Profile				
Current Registra		ayment iformation			veety Bird
Edit A	Member Inform		mber Profile   Logout		
	Name	Tweety Bird		Ne	ed Help?
	Email	tweety.bird@tyle	tech.com		ontact Us
	Phone Number		No N	- (8	806) 7-MEMBER
		XXX-XXX-XXXX (O)	otional)	Me	mber
		Change Pass	word		nouncements EBAR HERE
	Leave these fie	lds blank to keep y	our current passwor	d.	LOAR HERE
	Current Passw	ord			
	New Passw	rord			
	Confirm New Passw	rord			
		Save Changes	Cancel		
		Corre onongeo	o ano an		

3. To change your display name or email address, edit the text in the **Name** and **Email**fields. You must use a valid email address. You can enter your phone number to be saved in your profile as well. This number is used in the Business Licenses and Building Projects applications.

To change your password, type your current password in the **Current Password** field, and then type your new password in the **New Password** and **Confirm New Password** fields.

Member passwords can be changed at any time. The first time you log in, change your password to something that is easy to remember. Secure passwords are at least six characters long, include capital and lowercase letters, include at least one number, and include at least one special character (!  $\cdot + @ #$ , / etc.).

If you are not changing your password, leave all three fields in the **Change Password** section empty.

4. Click Save Changes.

# Recover a lost/forgotten password

1. Go to the Login page.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Login					
		Email: Password: Create an Acco	Log	g In covery	

2. Click the **Password Recovery** link. The Recover Your Password page loads.

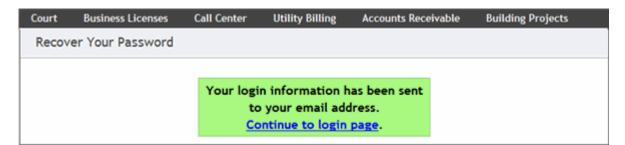
Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects			
Recover Your Password								
	En	·	address to reco ty.bird@tylertech.co Submit Cance					

3. Enter your email address and click **Submit**. If the system is unable to locate the email address you entered, the following message displays:

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects			
Recover Your Password								
	Er	-		ver your password.				
			ty.bird@tylertech.co					
Unable to find an account found for the email address entered.								
			Submit Cance					

This means that the email address you entered could not be verified. Make sure you typed your email address correctly. You can try another email address if you think you might have created your membership account using an alternate address.

If the system is able to verify your email address, an email is sent to your login email address and the following message displays:

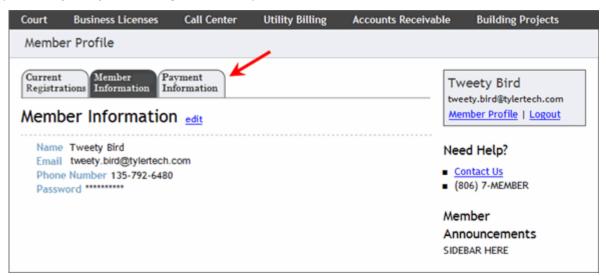


4. Check your inbox for a message from the InSite administrator containing your username and password.

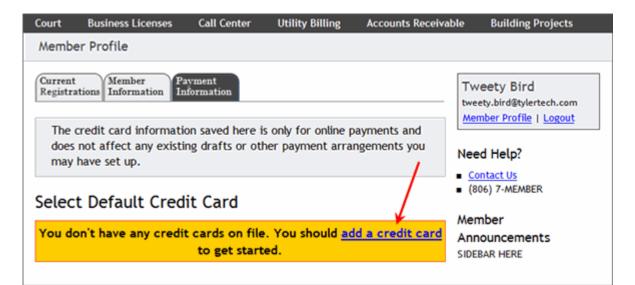
Your Login Information! From: "InSite@tylertech.com" <insite@tylertech.com> To: tweety.bird@tylertech.com</insite@tylertech.com>	
Here is your login information:	
Email: <u>tweety.bird@tylertech.com</u> Password: G00dPassw0rd	
You can use this information to log in.	

# Add a credit card for the first time

1. From any application page, click the **Member Profile** link. The Member Profile page loads with the **Member Information** tab selected. If you are not logged in, you are prompted to log in before you can continue.



2. Select the **Payment Information** tab. The Payment Information tab loads.



3. Click the add a credit card link. The Add New Credit Card page loads.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Membe	er Profile				
Current Registra		ayment formation		twe	veety Bird ety.bird@tylertech.com mber Profile   Logout
		Mastercard		Nee	ed Help?
	Credit Card Number Expiration Date		_	-	ontact Us 106) 7-MEMBER
	First Name On Card	Tweety		Mer	mber
	Last Name On Card	Bird			ouncements BAR HERE
	Billing Address 1	48 Mel Blanc Aw	Э.	5.00	
	Billing Address 2	[			
	Zip	01942			
		Save Card Ca	ancel		

- 4. Fill in your credit card information. All fields except **Billing Address 2** are required.
- 5. Click **Save Card**. The credit card is saved and automatically becomes your default card.

#### Add a credit card when making a payment

You can save a credit card to your profile when making a payment if you do not already have a credit card saved.

1. During the payment process, mark the **Save Card in Profile** checkbox.

ourt Business Licenses Cal Court	l Center	Utility Billing	Accounts Receiva	ble Building Projects
ay Ticket Online ake Payment				Tweety Bird tweety.bird@tylertech.com Member Profile   Logout
Payment Summary				
Violation	Ticket	Balance Owed	Payment Amount	Payment Method change
FAILURE TO APPEAR/BAIL JUMPING ssued: 6/7/2000 To: TIFHANY STANLEY Due: 6/7/2000	12458F	\$253.00	S 253.00	Credit Card Information. Card Type Please select  Credit Card Number
		SubTotal:	\$253.00	Evolution Date
		Total Payment:	\$253.00	Expiration Date
Proces	s Payment	Cancel		Last Name On Card Billing Address 1 Billing Address 2 Zip Save Card in Profile Court House Hours Monday - Friday: 8:30 a.m 5:00 p.m. (Excluding Holidays) Location 123 Main Street City, State 01234

2. When you click **Process Payment**, the credit card information saves to your profile for future use.

# Add an additional credit card to your account

Once you save one credit card, you can save additional credit cards to your account. This is useful when making a payment so that you can choose which credit card to use for each transaction.

1. From any application page, click the **Member Profile** link. The Member Profile page loads with the **Member Information** tab selected. If you are not logged in, you are prompted to log in before you can continue.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Membe	er Profile		-		
-		nyment formation		twee	eety Bird ety.bird@tylertech.com nber Profile   Logout
Email Phon	Tweety Bird tweety.bird@tylertech. e Number 135-792-6480 word			<ul> <li><u>Co</u></li> </ul>	d Help? ntact Us 06) 7-MEMBER
				Ann	nber ouncements BAR HERE

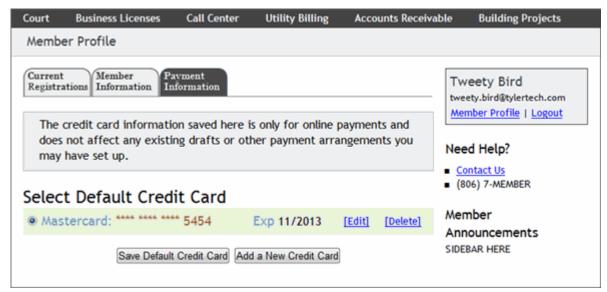
2. Select the **Payment Information** tab. The Payment Information tab loads and displays all the credit cards saved to your account. Your default credit card is selected and highlighted in green.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receiv	able Buildir	ng Projects
Memb	er Profile					
					Tweety Bi tweety.bird@t <u>Member Prof</u>	ylertech.com ile   <u>Logout</u>
may	have set up.				Contact Us	
Selec	t Default Cred	it Card			<ul> <li>(806) 7-MEA</li> </ul>	ABER
Mas	stercard: **** ****	* 5454	Exp 11/2013	[Edit] [Delete]	Member Announcer	ents
	Save Default	Credit Card Ad	ld a New Credit Car	d	SIDEBAR HERE	

3. Click Add a New Credit Card. The Add New Credit Card page displays.

Court	Business Licenses	Call Center	r Utility Billing	Accounts Receivable	Building Projects
Memb	er Profile				
Current Registra		ayment formation d		two	veety Bird eety.bird@tylertech.com mber Profile   Logout
	Card Type Credit Card Number Expiration Date First Name On Card	Mar 💌 20		■ <u>C</u> ■ (1	ed Help? ontact Us 306) 7-MEMBER mber
	Last Name On Card Billing Address 1 Billing Address 2	Bird 48 Mel Blanc	Ave.	An	BAR HERE
	Zip	01942 Save Card	Cancel		

- 4. Fill in your credit card information. All fields except **Billing Address 2** are required.
- 5. Click **Save Card**. The card you added automatically becomes your default credit card.



# Edit a credit card

1. From any application page, click the **Member Profile** link. The Member Profile page loads with the **Member Information** tab selected. If you are not logged in, you are prompted to log in before you can continue.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Membe	er Profile		/		
-		yment formation		twee	eety Bird ety.bird@tylertech.com nber Profile   Logout
Email Phon	e Tweety Bird tweety.bird@tylertech. e Number 135-792-6480 word			<ul> <li><u>Co</u></li> </ul>	d Help? <u>ntact Us</u> D6) 7-MEMBER
				Ann	nber ouncements BAR HERE

2. Select the **Payment Information**tab. The Payment Information tab loads and displays the credit cards saved to your account. Your default credit card is selected and highlighted in green.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivabl	e Building Projects
Memb	er Profile				
Current Registr		yment formation	only for online n	auments and	Tweety Bird tweety.bird@tylertech.com <u>Member Profile</u>   <u>Logout</u>
does	not affect any existi have set up.			ngements you	Need Help?
Selec	t Default Cred	it Card		,	Contact Us (806) 7-MEMBER
Am	ericanExpress: ****	**** **** 6483	Exp 3/2016	Edit Delete	Member Announcements
© Mas	stercard: **** **** ***	* 5454	Exp 11/2013		SIDEBAR HERE
	Save Default	Credit Card Add	a New Credit Card		

3. Click the **Edit** link next to the card you want to edit. The Edit Credit Card page loads. Make your changes.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Memb	er Profile				
Current Registra		ivment formation			veety Bird
Edit (	Credit Card				mber Profile   Logout
	Card Type	American Exp	vress	Ne	ed Help?
	Credit Card Number	375669753426	483	• <u>c</u>	ontact Us
	Expiration Date	Mar 💌 20	16 💌	- (8	806) 7-MEMBER
	First Name On Card	Tweety		Me	mber
	Last Name On Card	Bird			nouncements
	Billing Address 1	48 Mel Blanc A	Ave.		
	Billing Address 2				
	Zip	01942			
		Save Card	Cancel		

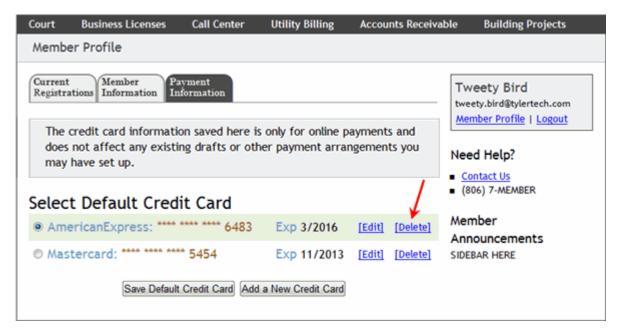
4. Click Save Card.

# Delete a credit card

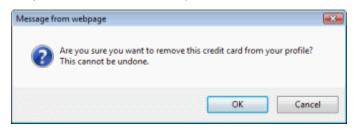
1. From any application page, click the **Member Profile** link. The Member Profile page loads with the **Member Information** tab selected. If you are not logged in, you are prompted to log in before you can continue.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Membe	er Profile		1		
		yment formation		twe	reety Bird ety.bird@tylertech.com mber Profile   Logout
Email Phone	Tweety Bird tweety.bird@tylertech. Number 135-792-6480 vord			= <u>Co</u>	ed Help? <u>mtact Us</u> 06) 7-MEMBER
				Ann	nber nouncements BAR HERE

2. Select the **Payment Information**tab. The Payment Information tab loads and displays all of the credit cards saved to your account. Your default credit card is selected and highlighted in green.

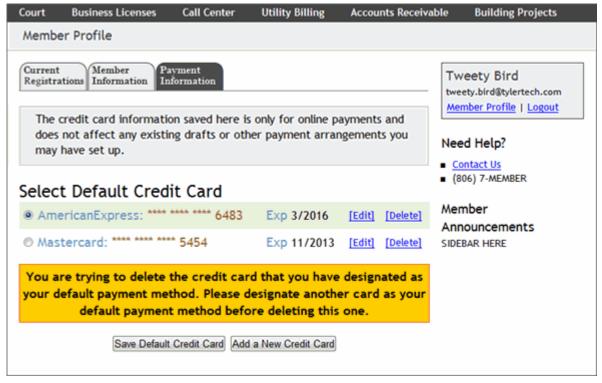


3. Click the **Delete**link next to the card you want to permanently remove from your profile. You are prompted to confirm that you want to delete the card.



4. Click OK.

**Note**: You cannot delete the default card. You must first designate another card as the default card, then delete the desired card.



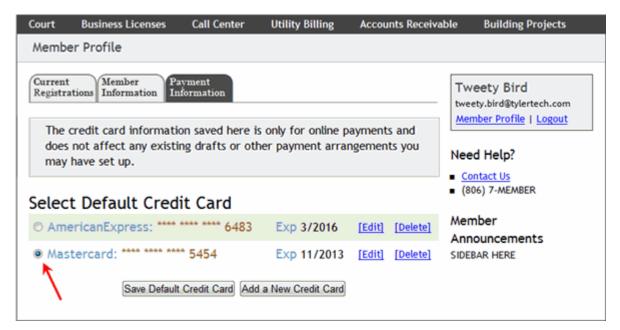
# Change your default credit card

Your default credit card is the card automatically used to make payments unless you select another card when making a transaction. You can change your default card at any time. If you have only one credit card in your profile, it is your default credit card.

1. From any application page, click the **Member Profile** link. The Member Profile page loads with the **Member Information** tab selected. If you are not logged in, you are prompted to log in before you can continue.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Memb	er Profile		-		
		yment formation		tw	veety Bird eety.bird@tylertech.com ember Profile   <u>Logout</u>
Email Phon	Tweety Bird tweety.bird@tylertech. Number 135-792-6480 word			• <u>c</u>	ed Help? ontact Us 806) 7-MEMBER
				An	mber nouncements EBAR HERE

2. Select the **Payment Information**tab. The Payment Information tab loads and displays the credit cards saved to your account. Your default credit card is selected and highlighted in green.



- 3. Select the radio button next to the card you want to be your new default credit card.
- 4. Click **Save Default Credit Card**. The default credit card is saved and highlighted in green.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receiv	able Building Projects
Memb	er Profile				
Current Registr		yment formation			Tweety Bird tweety.bird@tylertech.com
does	credit card information not affect any existing have set up.				Need Help?
Selec	t Default Credi	t Card			(806) 7-MEMBER
© Am	ericanExpress: ****	**** **** 6483	Exp 3/2016	[Edit] [Delete]	Member Announcements
• Mas	stercard: **** **** ****	* 5454	Exp 11/2013	[Edit] [Delete]	SIDEBAR HERE
	Save Default	Credit Card Add	a New Credit Card		

### Member account security

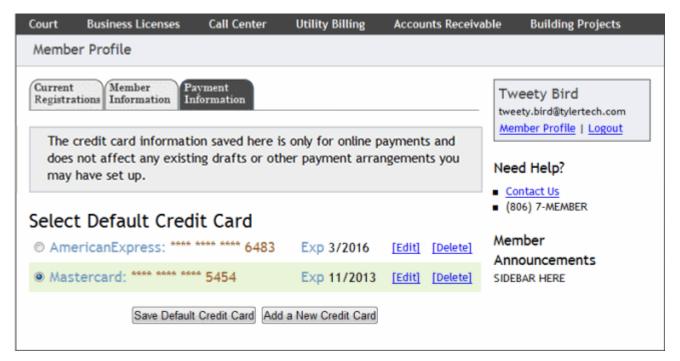
Personal information is collected and stored by the website and the software that powers the site. All information passes over the Internet using SSL 128-bit encryption. This is the industry standard for passing important information securely over the Internet. You can verify the use of this encryption by making sure the URL for the page you are on is prefixed by "https://". The secure certificate can be viewed by clicking the lock symbol in your web

browser. It is recommended that users access the site using one of the following browsers or newer: Internet Explorer 7.0, Firefox 2.0, Safari 2.0, Opera 9.0, or Google Chrome 2.0.

All member passwords and credit card numbers are encrypted again when stored in the database. The password cannot be viewed on the website and requires a user to have access to the email account of the member in order to retrieve the password. In addition, the user must be logged in to change the password and must re-enter the existing password. A member credit card number can only be viewed on the Edit Credit Card page.

Court	Business Licenses	Call Center	Utility Billing	Accounts Receivable	Building Projects
Membe	er Profile				
		ayment Iformation		twe	veety Bird ety.bird@tylertech.com <u>mber Profile</u>   <u>Logout</u>
	Card Type	American Expre	ss 💌	Nee	d Help?
	Credit Card Number	37566975342648	33		ontact Us
	Expiration Date	Mar 💌 2016		<ul> <li>(8)</li> </ul>	06) 7-MEMBER
	First Name On Card	Tweety		Mer	nber
	Last Name On Card	Bird			ouncements BAR HERE
	Billing Address 1	48 Mel Blanc Av	e.	SIDE	BAK HERE
	Billing Address 2				
	Zip	01942			
		Save Card C	ancel		

On all other pages on the site where the member's credit card information displays, the card number itself is replaced by asterisks (\*) except for the last four digits.



Members are encouraged to only view or make changes to their credit card information in a safe location. A safe location is defined as a computer under the user's control which does not have malicious software installed on it (known or unknown) and which is located where others cannot see the user's personal information. A good example of this would be the user's home computer with a firewall, anti-virus, and anti-spyware software running. Public places, with computers or wi-fi hot spots with free access, such as the public library or a sidewalk café, should be avoided.

# Current Registrations tab: Manage registrations

View the Current Registrations page by selecting the **Current Registrations** tab of your Member Profile page. The **Current Registrations** tab displays accounts, entities, or contacts you have registered. There are also links to add new registrations or to remove registrations.

	Member Information Payment Information Registrations	Tweety Bird tweety.bird@tylertech.com <u>Member Profile</u>   <u>Logout</u>			
Jtility Billin	ng Accounts		Add an Acco	ount	Need Help?
ccount #	Address	Last Payment	Balance		<ul> <li>Contact Us</li> <li>(806) 7-MEMBER</li> </ul>
1-0520-01 ast Due	5009 RIDGE CREST DR.	(\$140.25) 04/08/2003	\$282.81 Due 05/27/2003	8	Member
0-2050-00 ctive	4732 CRAWFORD DR.	(\$776.62) 05/07/2003	\$620.47 Due 05/30/2003	8	Announcements SIDEBAR HERE
5-7020-00 ctive	6317 FALL RIVER DR	(\$332.38) 04/07/2003	\$191.06 Due 05/08/2003	8	
<u>C-0020-01</u> ctive	60 CHARLIES WAY	(\$5.00) 07/09/2009	\$1,586.01 Due 03/15/2008	8	
Building Pr	ojects Entity				
lame	Co	ntractor	Status		
weety Bird	No		Pending	Θ	
lusiness Li	cense Contacts		Add a Cont	act	
	ere are no Business Licens mbership. <u>Register a cont</u>		d with your		