



**SpryPoint**

SMART SOLUTIONS FOR SMART UTILITIES

# **SpryEngage - Invoice Cloud Integration Business Requirements Document**

45 Queen Street  
Charlottetown,  
PE, C1A 4A4

[sprypoint.com](http://sprypoint.com)

# Table of Contents

- Table of Contents** **1**
- Authors 1
- Document History 1
- Statement of Confidentiality 2
- Integration Details** **3**
- Description from Statement of Work 3
- Background and Business Value 3
- Business Requirements 3
- Dependencies 3
- Assumptions 4
- Out of Scope 4
- Outstanding Decisions & Questions 4
- Project Impacts** **5**
- Schedule 5
- Configuration - candidate for removal 5
- Testing 5
- Training 5
- Document Approval** **6**

## Authors

Name	Role
Rafael Cuartas	Product Owner

## Document History

Date	Version
Nov 30, 2023	1.0 - Initial content

## **Statement of Confidentiality**

The contents of this report are confidential and are supplied on the understanding that they will be held confidentially and not disclosed to third parties without the prior written consent of SpryPoint.

# Integration Details

## Description from Statement of Work

This document outlines the functional requirements and objectives for the integration between SpryEngage and Invoice Cloud. The integration aims to streamline billing payment processes and enhance customer interaction by offering a seamless login process through existing Invoice Cloud credentials.

This integration seeks to provide customers with diverse payment options and services, including bill payments, autopay subscriptions, paperless billing, wallet management, scheduled payments, text-to-pay within SpryEngage.

## Background and Business Value

Cartersville aims to enhance customer experience by integrating SpryEngage with Invoice Cloud, offering customers a unified platform for billing services. The collaboration intends to simplify access to billing features and empower customers with a range of payment options. By leveraging the suite of functionalities provided by Invoice Cloud, Cartersville anticipates streamlining billing processes and catering to diverse customer preferences in payments.

## Business Requirements

### 1. Customer Account Authentication

- SpryEngage will utilize the existing Invoice Cloud account credentials for customer authentication, ensuring a unified and seamless login experience for users. Invoice Cloud will serve as the primary system of records for authentication purposes.
- During the creation of new customer accounts, SpryEngage will capture and validate all necessary customer contact information. Upon successful validation, SpryEngage will automatically generate both SpryEngage and Invoice Cloud accounts for the customer, ensuring synchronicity between the platforms.
- In instances where a customer account is terminated within SpryEngage, the system will automatically initiate the update process within Invoice

Cloud. This synchronization action will promptly disable the corresponding account within Invoice Cloud, ensuring consistency and security across both platforms.

## **2. Bill Payments**

- SpryEngage will streamline the payment process by allowing customers to conveniently settle their account balances through the Invoice Cloud payment portal.
- Leveraging the existing Invoice Cloud iFrame, SpryEngage will seamlessly integrate the Invoice Cloud payment portal into its interface, providing customers with a familiar and user-friendly platform to initiate payments.
- The integration will encompass various payment methods available within the Invoice Cloud system. Customers accessing the payment portal through SpryEngage will have access to the array of payment methods previously defined and configured by Cartersville within Invoice Cloud.

## **3. One-time Payments**

- SpryEngage prioritizes customer convenience by facilitating bill payments without the necessity of logging into the SpryEngage portal. Both existing and non-existing customers will be empowered to make one-time payments with ease and efficiency through SpryEngage.
- Upon successful account validation, which will be based on Account Number and Postal Code or Company/Customer Last Name, customer users will gain direct access to the Invoice Cloud payment portal within SpryEngage, leveraging the existing Invoice Cloud iFrame.

## **4. Paperless Billing Subscription**

- Customers will have the choice to transition to paperless billing, opting to receive their billing statements electronically via email, eliminating the need for physical paper invoices.
- Within SpryEngage, customers will find a streamlined process to either sign up for the Paperless Billing program or manage their existing subscription seamlessly.
- Utilizing the Invoice Cloud iFrame, SpryEngage will provide an intuitive interface for customers to easily enroll or modify their preferences related to paperless billing.

## 5. Wallet Management

- Customers will have the capability to securely manage and store their preferred payment methods, including credit card and bank account information, within Invoice Cloud via SpryEngage. This feature aims to streamline future payment processes by enabling customers to securely store their payment details for convenient and swift transactions.
- SpryEngage will integrate existing Invoice Cloud iFrames seamlessly into its interface, providing customers with a secure platform to enter, manage, and store their payment information. Through this integration, customers will have the convenience of securely entering their payment details without leaving the SpryEngage environment, ensuring a user-friendly and protected experience.

## 6. Autopay Management

- Customers will have the convenience of setting up and managing recurring payments through the Autopay feature, facilitated by the integrated functionalities of Invoice Cloud within SpryEngage. This functionality streamlines the bill payment process, automatically settling bills through Invoice Cloud once they are generated, providing customers with a hassle-free payment experience.
- All registered payment methods and associated autopay preferences will be securely stored within Invoice Cloud. Invoice Cloud will handle the automatic processing of invoice payments as per the predefined autopay settings established by customers.
- SpryEngage will seamlessly embed the Invoice Cloud AutoPay iFrame, providing customers with a user-friendly interface to effortlessly enroll, modify, or terminate their autopay preferences. The integration aims to provide an intuitive and secure environment within SpryEngage, allowing customers to manage their autopay settings conveniently without navigating away from the platform.

## 7. Scheduled Payments

- SpryEngage will allow customers to schedule payments for future dates through Invoice Cloud integration, augmenting their control and foresight in managing bill payments.
- Within SpryEngage, customers will access the Invoice Cloud Scheduled Payment iFrame seamlessly embedded to offer an intuitive and user-friendly interface. The iFrame will facilitate customers in scheduling their payments, granting them the flexibility to decide the timing and amounts of their upcoming payments according to their preferences.

## 8. Pay by Text

- SpryEngage will allow customers to enroll and manage the Invoice Cloud's "Pay By Text" feature, facilitating swift bill payments directly through text messages.
- Within SpryEngage, the Invoice Cloud Pay By Text iFrame will be seamlessly embedded, offering customers a hassle-free interface to swiftly sign up for the Pay By Text service.
- Customers can easily register their phone numbers that will be used by the Pay By Text service. All information provided during the registration process will be securely stored within Invoice Cloud.

# Dependencies

## Invoice Cloud iFrame/API Integration

The successful implementation of the functionalities within SpryEngage relies on a stable and functional integration with Invoice Cloud iFrames and APIs. Any changes or updates to the Invoice Cloud iFrames or APIs might affect the functionality and performance of SpryEngage.

## Data Synchronization

Effective synchronization of customer data, billing information, and payment details between SpryEngage and Invoice Cloud is pivotal. Any discrepancies or delays in data synchronization processes might impact the accuracy and timeliness of billing and payment functionalities.

# Assumptions

For SpryEngage to access essential Invoice Cloud functionalities, these features need to be available and accessible according to the service agreement established between Cartersville and Invoice Cloud.

# Out of Scope

#	Item
1	

# Outstanding Decisions & Questions

#	Question
1	



# Project Impacts

## Testing

Scenarios to test:

### 1. Authentication Testing

- Verify the authentication process for users with existing Invoice Cloud credentials logging into SpryEngage.
- Validate the creation of new customer accounts in both SpryEngage and Invoice Cloud upon data validation.

### 2. Bill Payments Testing

- Test various payment methods (e.g., credit card, bank account) within the Invoice Cloud iFrame on SpryEngage.
- Ensure seamless redirection to the Invoice Cloud payment portal within SpryEngage for customers making payments.

### 3. One-time Payment Testing

- Validate the One-time payment feature for both existing and non-existing customers, ensuring account validation and bill payment without SpryEngage login.

### 4. Paperless Billing Subscription Testing

- Verify customer enrollment and management of paperless billing within the existing Invoice Cloud iFrame integrated into SpryEngage.

### 5. Wallet Management Testing

- Test the functionality for customers to manage payment methods and securely store card information within Invoice Cloud through SpryEngage.

### 6. Autopay Management Testing

- Validate customers' setup and modification of recurring payments (Autopay) through the Invoice Cloud functionality on SpryEngage.

### 7. Scheduled Payments Testing

- Test the scheduling of payments for future dates using the Invoice Cloud Scheduled Payment iFrame embedded in SpryEngage.

## **8. Pay By Text Testing**

- Validate the sign-up and management process for the Invoice Cloud "Pay by Text" feature through the SpryEngage interface.

# Document Approval

The City of Cartersville has had the opportunity to review this report and at this time finds no issue with the content.

City of Cartersville Approved by:

\_\_\_\_\_  
Signature of Authorized Representative of  
the City of Cartersville

Name (print):

\_\_\_\_\_

Date: \_\_\_\_\_

-----

SpryPoint Accepted by:

\_\_\_\_\_  
Name (print):

\_\_\_\_\_

Date: \_\_\_\_\_

