

## SETTING UP YOUR MY QUADIENT ACCOUNT

We highly recommend our clients set up a MyQuadient account in order to gain greater visibility to all your mailing system activities and invoicing. If you have questions or need assistance in setting up your MyQuadient Account, **Call Us First at 303-761-0681**. You'll speak with a real person (not a phone tree) whenever you call, Monday through Friday from 8:00 am – 4:30 pm.

When you set up your MyQuadient account, you will be able to:

- Set up email notifications and alerts
- Track postage activity and use
- Identify current balance and limits in your postage account – Quadient Postage Funding (formerly NeoFunds/TotalFunds)
- View and pay invoices
- Get information on USPS rate changes

To set up a MyQuadient account, you can use:

- Your Funding Account number (Postage On Call POC) and meter serial number (PREFERRED)
- Customer number and meter serial number
- Customer number and invoice number

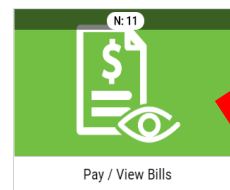
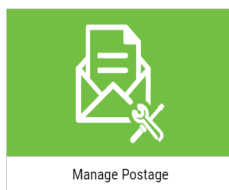
Please call us at **303-761-0681** if you need any of this information.

Simply go to [myquadient.com](http://myquadient.com), click on the Register button in the upper right-hand corner and fill out the requested information.

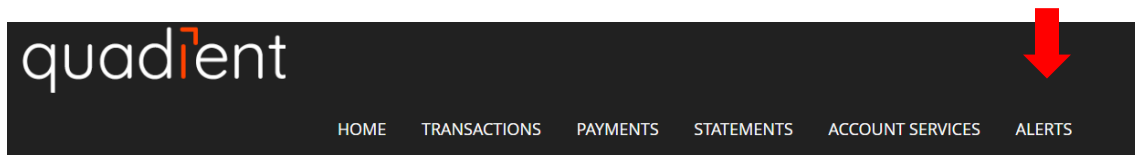
### Setting Up Alerts

- Sign into your MyQuadient.com account
- Click on Pay/View Bills option


#### My Billing, Postage and Supplies



- Click on the “ALERTS” Tab



- Click on “ADD NEW ALERT” and select the alert you want from the drop-down menu in the panel that will appear on the right side of the screen. At a minimum, CMS strongly recommends turning on the following 3 notifications to help prevent “no funds” issues:



**Best Practices**

Turn on:

- Credit limit is reached or exceeded
- Current balance exceed \$
- Current balance within \$ of credit limit

Alert Settings	Alert History
<input checked="" type="checkbox"/> A payment posts to my account	CMS Live Neofunds <a href="#">Edit</a>
<input checked="" type="checkbox"/> A single transaction exceeds	CMS Live Neofunds <a href="#">Edit</a>
<input type="checkbox"/> A single transaction exceeds	CMS Live Neofunds <a href="#">Edit</a>
<input checked="" type="checkbox"/> Account Past Due	CMS Live Neofunds <a href="#">Edit</a>
<input checked="" type="checkbox"/> Available credit drops below	CMS Live Neofunds <a href="#">Edit</a>
<input checked="" type="checkbox"/> Credit limit is reached or exceeded	CMS Live Neofunds <a href="#">Edit</a>
<input checked="" type="checkbox"/> Current balance exceeds \$	CMS Live Neofunds <a href="#">Edit</a>
<input checked="" type="checkbox"/> Current balance within \$ of credit limit	CMS Live Neofunds <a href="#">Edit</a>
<input checked="" type="checkbox"/> Number of transactions exceeds	CMS Live Neofunds <a href="#">Edit</a>
<input checked="" type="checkbox"/> Payment Due in X Days	CMS Live Neofunds <a href="#">Edit</a>
<b>Mandatory Alerts</b>	
<input checked="" type="checkbox"/> New statement is available	CMS Live Neofunds <a href="#">Edit</a>

## Setting Up Recurring Payments

- Click on the “PAYMENTS” tab and choose “MANAGE RECURRING PAYMENT” from the drop-down menu

PAYMENT SUMMARY	
MANAGE PAYMENT ACCOUNTS	
MAKE A PAYMENT	
MANAGE RECURRING PAYMENTS	
Current Balance	\$0.00
Pending Balance	
Statement Balance	\$0.00
Available Limit	
Current Limit Amount	
Last Payment as of Feb 18, 2020	\$0.00
Total Minimum Due	\$0.00
Payment Due Date	Mar 30, 2020

- Follow the setup prompts:

[Payment Summary](#) > Recurring Payments

Account Amount Date Verify Confirmation

Step 1 of 5: Choose a bank account ?

CMS Chase Account for Postage

Or [Add a New Account](#)

**Payment Instructions:**  
You can set up a recurring payment plan so that your payment is automatically paid each month. You can only have one active plan set up on your account. You must choose between the Minimum Payment due or Statement Balance Due payment amount options. Payment Account Notice! Please be sure to verify your payment account details before submitting your payment. If necessary, you can setup a new payment account.

Cancel Plan Next

## Setting Up Electronic Funds Transfer

- Choose “ADD NEW ACCOUNT” and add your bank account information to set up an Electronic Funds Transfer.

[Payment Summary](#) > Recurring Payments

Account Amount Date Verify Confirmation

Step 1 of 5: Choose a bank account ?

CMS Chase Account for Postage

Or [Add a New Account](#)

**Payment Instructions:**  
You can set up a recurring payment plan so that your payment is automatically paid each month. You can only have one active plan set up on your account. You must choose between the Minimum Payment due or Statement Balance Due payment amount options. Payment Account Notice! Please be sure to verify your payment account details before submitting your payment. If necessary, you can setup a new payment account.

Cancel Plan Next