Establishing an Account

Follow the below steps to set up an account.

1. From the Corporation's homepage, click "Start An Order."
2. At the login screen, choose "Click here to create a new account."
3. Determine the type of account you wish to create: Organization or Personal.

   Note: If creating an Individual Account to allow an authorized representative to order documents on behalf of a Commercial account, **DO NOT** enter the business entity's ACH information here. The authorized representative will automatically be linked to the Commercial account by updating the Commercial Account's profile with the name of the representative. You will need to do this first. See below.

4. Complete all fields, including name, address, phone and fax numbers.
5. Complete the E-mail address fields with address of
   a. The person to be notified on behalf of the entity
   b. The person to receive Document Notifications
   c. The person to receive copies of invoices (marked as paid)
6. Enter the ACH information
   a. Routing number (normally the first set of numbers at the bottom of the check)
   b. Account number (normally the second set of numbers at the bottom of the check)
7. Click to enable ACH
8. Create User ID and Password of your choosing. There is no limit to the number of characters. Also, write this down for future orders or payments.
9. Click "Submit" to view a confirmation page of your entries.
10. Write down or otherwise keep your login and password for future use.

Managing My Account

Once you have logged into your account there will be a few tools you can use to manage your account located on the left information column under Online Orders. These tools and descriptions are as follows: ***Note: these tools are not visible unless you are logged into your account.***

1. Start an Order – to begin a new order
2. Pay A Paper Invoice – allows payment of an invoice online
3. New Payment Procedures – information on the payment procedures
4. Shopping Cart – to view your shopping cart
5. Manage My Reps – to add, delete or change commercial representatives on the acount
6. Check My Orders – to view orders placed within the past thirty days
7. Past Orders Report – to view older orders
8. Maintain My Profile – to make any changes in address, ACH or Credit Card Information
9. Privacy Policy – Privacy Policy of the NC Secretary of State's Office
10. Verify Certification – website to verify the certification number of a document

11. Logout – to log out of your account

Change Information on My Profile Account

Once an account has been created it is not necessary to create a new account in order to purchase documents online using a credit card or ACH transaction. If you have to change information on your account you will need to view the profile by clicking "Maintain My Profile" and following the procedures below.

Change ACH and Credit Card Information

1. Go to "Start an Order" at the Corporation's home page.
2. Log in to the system with your current User ID and Password.
3. Click "Maintain My Profile" in the far left column.
4. In the center of the screen in blue, choose "click here to update your information.
    a. Enter the ACH Information
        i. Account Routing
        ii. Account Number
    b. Make any other changes as necessary
    c. If you are adding or changing an ACH number, make sure "Enable ACH" is checked.
5. When you are finished, click "Submit."

Adding or Changing Commercial Representatives

To view all representatives currently authorized to purchase or file documents online, click "Manage My Reps" by following the procedures below.

Adding a Commercial Representative

When adding a Rep to a commercial account, you will need to first create the individual's login and password before adding them as a Rep to the commercial account.

1. Create in individual account for Rep <u>excluding payment method</u> and then log out.
2. Go to "Start an Order" at the Corporation's home page
3. Log into the system with the commercial Login ID and Password.
4. Click "Manage My Reps."
5. To add the new individual as a commercial representative, enter the Login ID created and click "Add Rep."
6. If a user is listed here as a representative on the Commercial Account, it is not necessary to update a representative's Individual Account Profile with ACH account information

Deleting Reps

7. From the "Manage My Reps" window (see above steps 2-4)
8. Check the box next to the Rep to be deleted
9. Click "Delete Reps."