

PORTAL INTRODUCTION

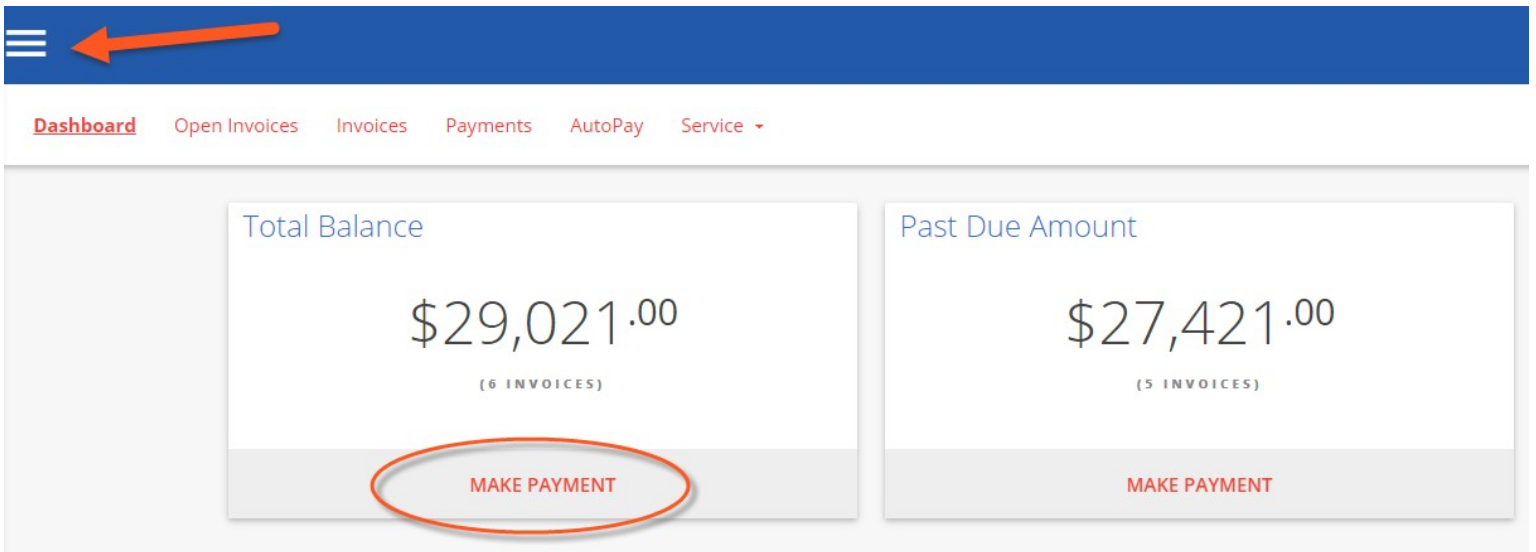
A Quick "How-To" Guide

Viewing + Paying Invoices

Dashboard

This is the first thing you will see when logging in, known as the "Dashboard" portal section.

- From here you may quickly view invoices and make payments using the prominent tiles.
 - The tiles will link to the same "Open Invoices" portal segment.
- Using the three bar menu, you may change your password, logout, or "change companies" if applicable.



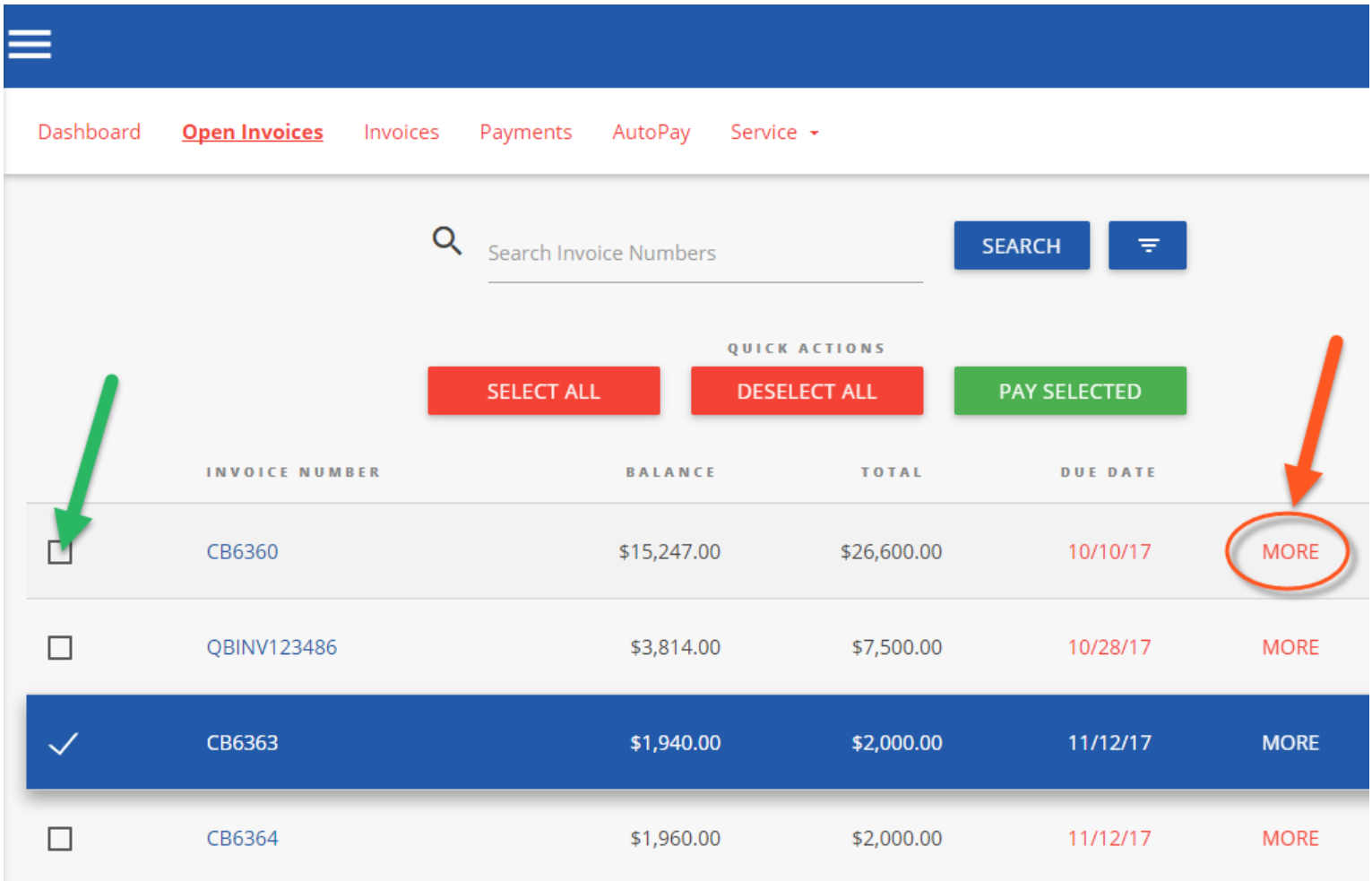
Dashboard Open Invoices Invoices Payments AutoPay Service ▾

Total Balance	Past Due Amount
\$29,021.00	\$27,421.00
(6 INVOICES)	(5 INVOICES)
MAKE PAYMENT	MAKE PAYMENT


Open Invoices

Click the "OPEN INVOICES" menu option:

- All currently open invoices in our system are listed here. Please let us know if items are missing!
 - If needed, you may conveniently sort & filter with the three bar button.
 - Select the items you wish to pay, and click "Pay Selected".



Dashboard **Open Invoices** Invoices Payments AutoPay Service ▾

Search Invoice Numbers **SEARCH** 

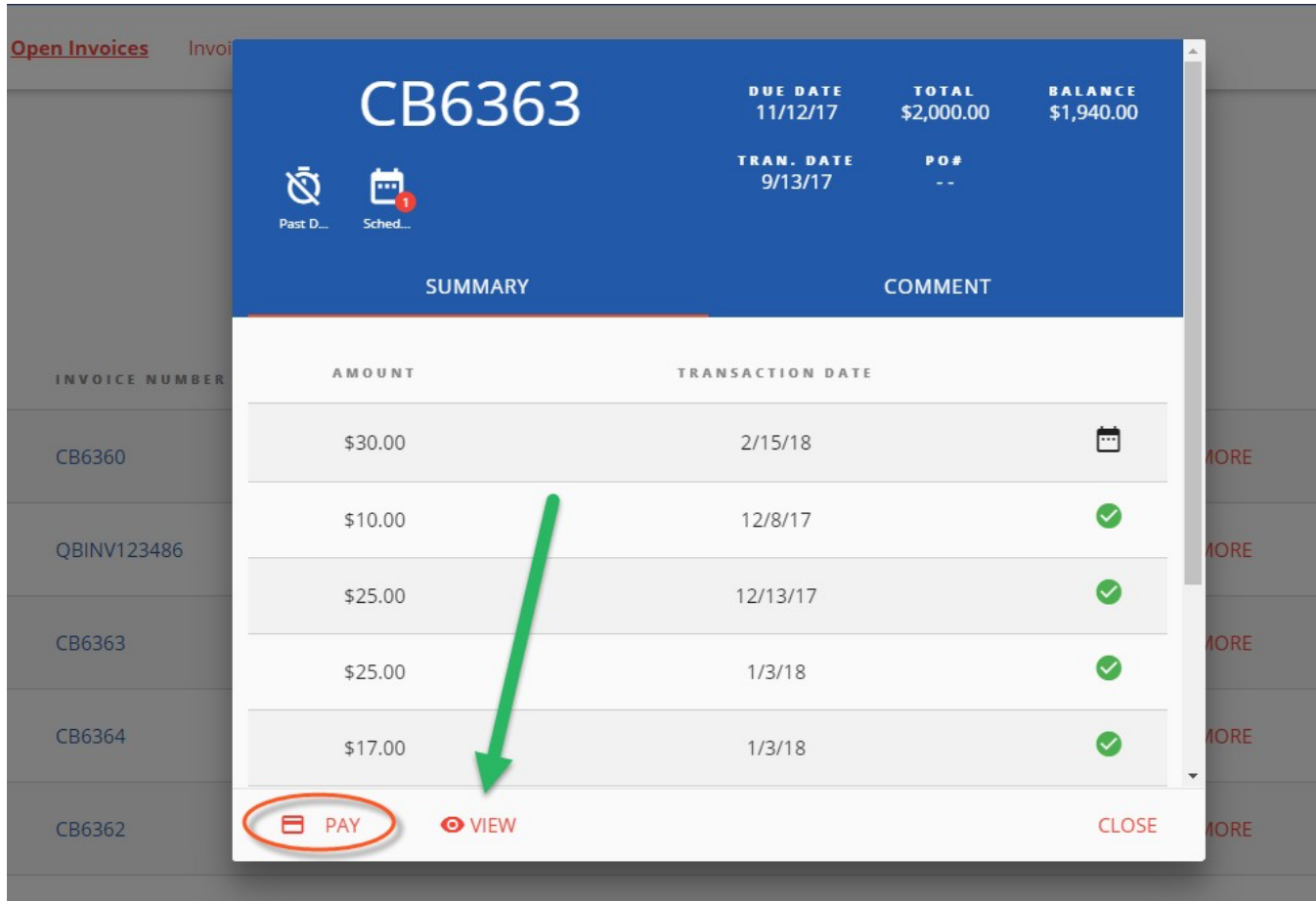
QUICK ACTIONS

SELECT ALL **DESELECT ALL** **PAY SELECTED**

	INVOICE NUMBER	BALANCE	TOTAL	DUE DATE	
<input type="checkbox"/>	CB6360	\$15,247.00	\$26,600.00	10/10/17	MORE
<input type="checkbox"/>	QBINV123486	\$3,814.00	\$7,500.00	10/28/17	MORE
<input checked="" type="checkbox"/>	CB6363	\$1,940.00	\$2,000.00	11/12/17	MORE
<input type="checkbox"/>	CB6364	\$1,960.00	\$2,000.00	11/12/17	MORE

Clicking "MORE" on any invoice will display a details window:

- Please "VIEW" to see the specific line items in PDF format
 - The PDF will open in a new browser tab
 - (Encountering issues? Try using Google Chrome! Or temporarily allowing pop-ups)
 - You may print/save the PDF as desired
 - Click on "Comment" to send us an inquiry regarding a particular invoice



Open Invoices Invoic

CB6363

DUE DATE 11/12/17 **TOTAL** \$2,000.00 **BALANCE** \$1,940.00

TRAN. DATE 9/13/17 **PO#** --


Past D... Sched... 1

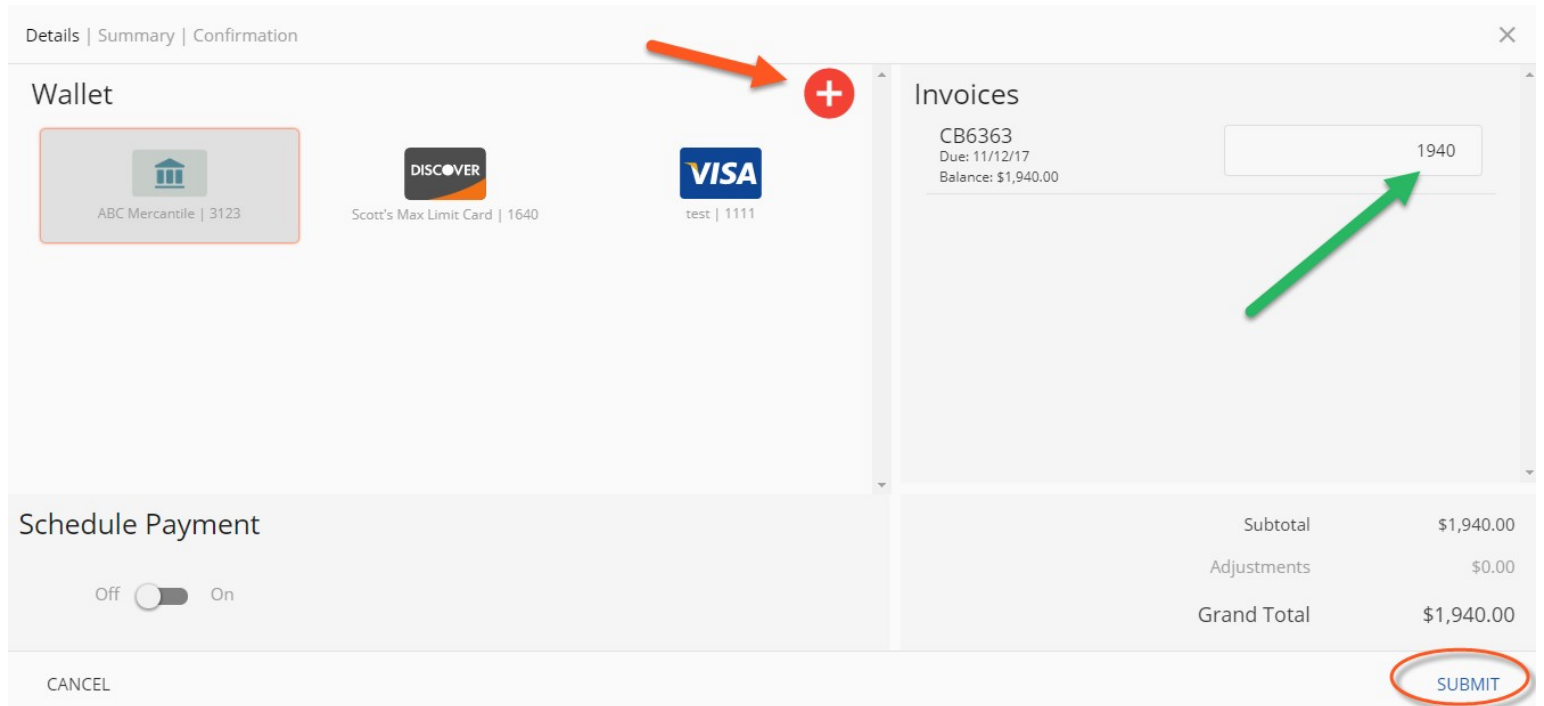
SUMMARY **COMMENT**

INVOICE NUMBER	AMOUNT	TRANSACTION DATE	
CB6360	\$30.00	2/15/18	
QBINV123486	\$10.00	12/8/17	
CB6363	\$25.00	12/13/17	
CB6364	\$25.00	1/3/18	
CB6362	\$17.00	1/3/18	

PAY **VIEW** **CLOSE**

To Process a payment:

- Select the checkbox of one (or multiple) invoice(s). Click "PAY SELECTED" 
 - A dialog will appear: please select a payment method on file, or add a new entry.
 - Partial payment amounts can be entered in the top right corner!
 - You have the option of splitting payments up with multiple payment methods.



Details | Summary | Confirmation

Wallet

ABC Mercantile | 3123

DISCOVER Scott's Max Limit Card | 1640

VISA test | 1111

Invoices

CB6363
Due: 11/12/17
Balance: \$1,940.00

1940

Schedule Payment

Off On

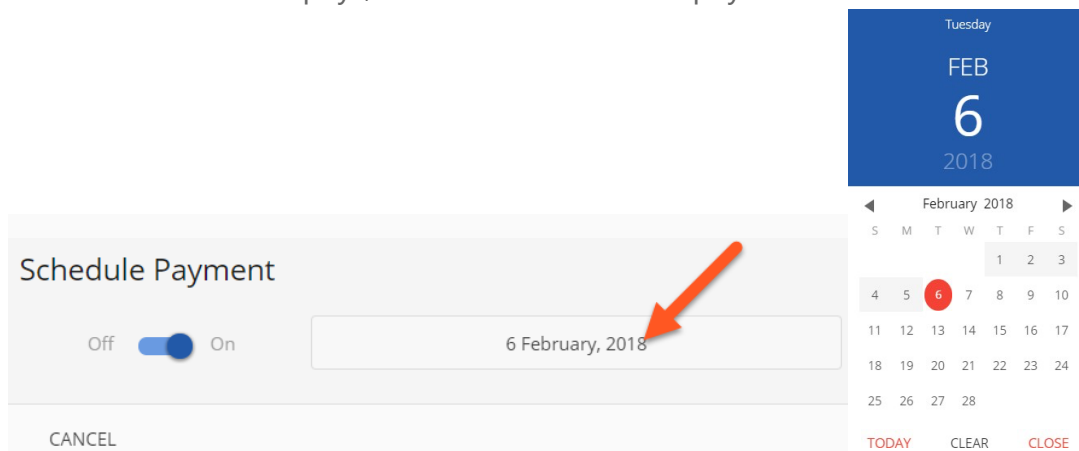
CANCEL

Subtotal	\$1,940.00
Adjustments	\$0.00
Grand Total	\$1,940.00

SUBMIT

Advanced Payment Options:

- Selecting the "Schedule Payment" switch to "ON" offers the ability to pick a specific payment date, using the Date Picker.
 - This is not an "auto-pay", but rather a one-time payment for the future.



Schedule Payment

Off On

6 February, 2018

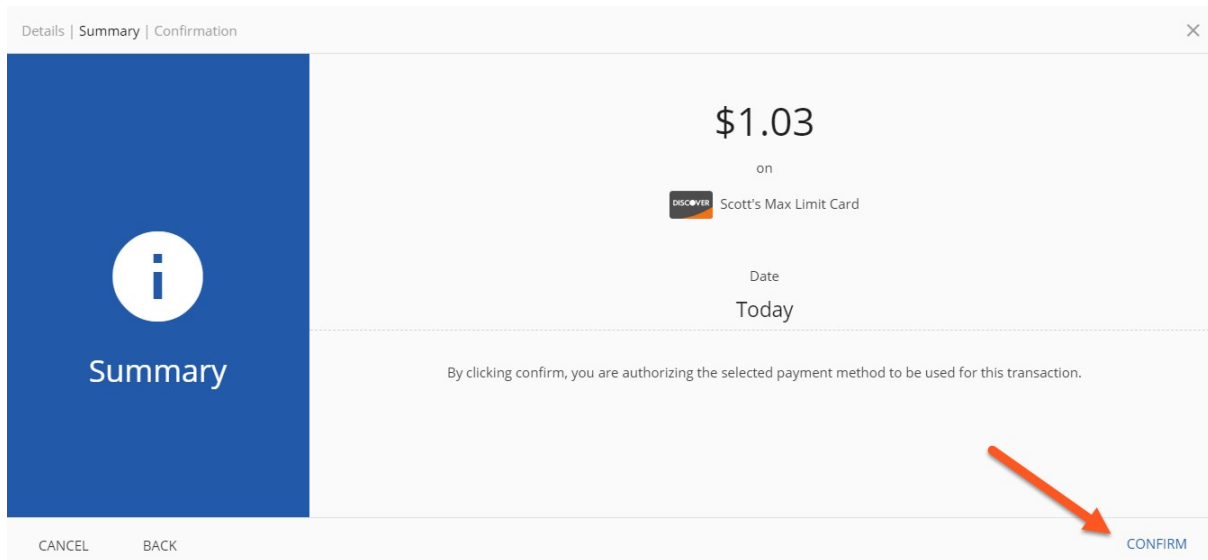
CANCEL

February 2018

S	M	T	W	T	F	S	
					1	2	3
4	5	6	7	8	9	10	
11	12	13	14	15	16	17	
18	19	20	21	22	23	24	
25	26	27	28				

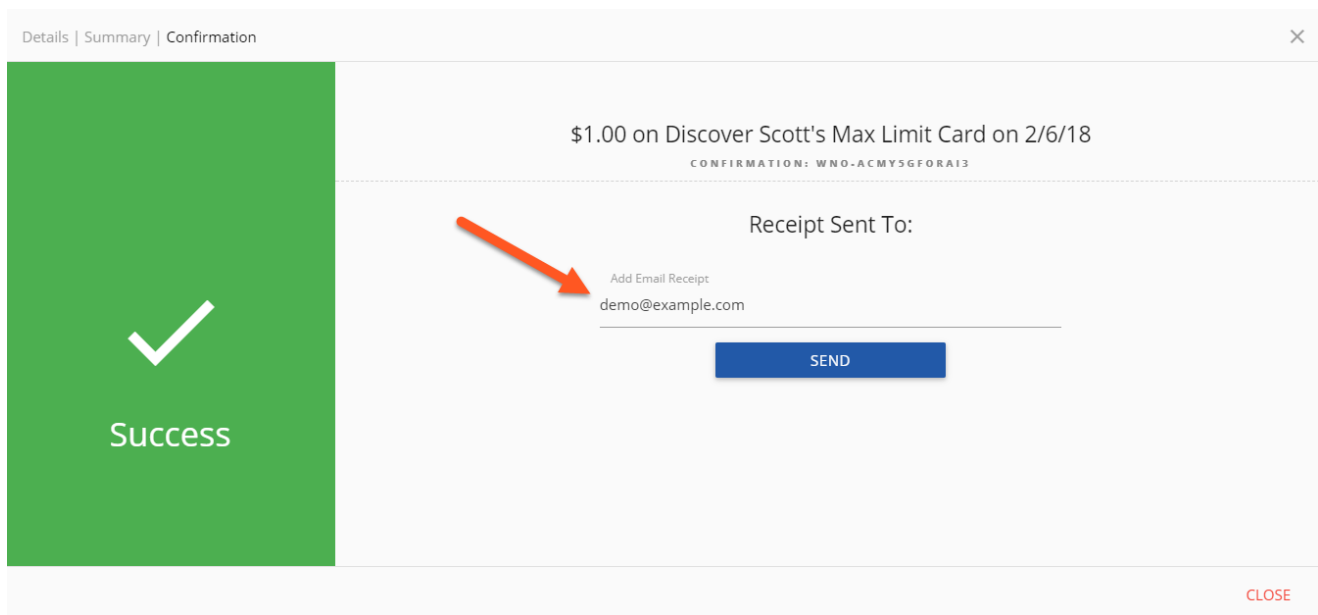
TODAY CLEAR CLOSE

Clicking "SUBMIT" will give you a chance to review your actions.



Clicking "CONFIRM" will yield a payment success or failure screen


- An email receipt will be sent to your login email address.
 - You may send any additional receipts using the "Add Email Receipt" field.
- If the payment is scheduled for the future, the receipt will show the scheduled payment date.



Invoice History

Click on the "Invoices" menu option:


- Click "MORE" on previously issued and archaic invoices
 - You may again view specific details, or print & save the PDF
 - The page numbers on the right, and search box can help narrow the results



Dashboard Open Invoices **Invoices** Payments AutoPay

Q Search Invoice Numbers **SEARCH** < 1 2 3 4 ... >

INVOICE NUMBER	BALANCE	TOTAL	DUE DATE ▲	
CSb58f033a4	\$0.00	\$0.60	2/22/18	MORE
CSb4361527d	\$0.00	\$0.30	2/18/18	MORE
CB6366	\$1,600.00	\$1,600.00	2/18/18	MORE
CSb3f6b703e	\$0.00	\$0.06	2/17/18	MORE
CSb3d6117ac	\$0.00	\$0.30	2/15/18	MORE




Payments

Click on the PAYMENTS menu option:

- View all currently pending, future scheduled (including AutoPay) or past historic payments

[Dashboard](#) [Open Invoices](#) [Invoices](#) **[Payments](#)** [AutoPay](#)

 Search Payments

SEARCH









QUICK FILTER

PAST

PENDING

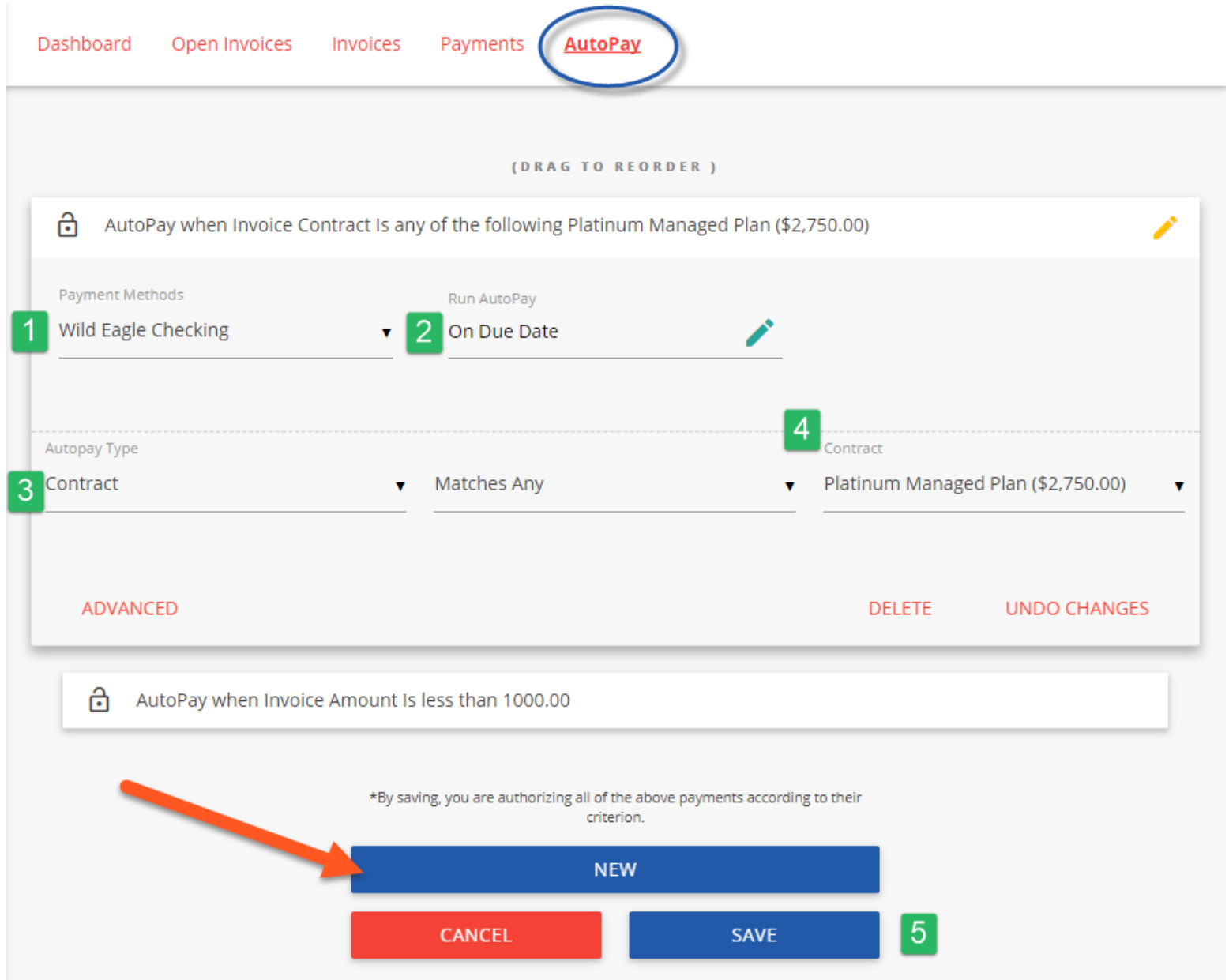
SCHEDULED

TRANSACTION	TOTAL PAYMENT	DATE	PAYMENT METHOD	
CBba17670f7	\$1.03	2/6/18	 Scott's Max Limit Card	
CBb894531d0	\$26.00	2/2/18	 ABC Mercantile	
CBb894530e5	\$26.00	2/2/18	 ABC Mercantile	

AutoPay

Click on the AUTOPAY menu option:

- Click "NEW", and expand to reveal the available options
- Configure your preferences in 5 steps, as per the example image below
 - Note: You can have more than one "AutoPay" Rule/Condition at a time!
 - With the below "less than \$" example, "one-off" type invoices can also be paid automatically!



The screenshot shows the AutoPay configuration interface. At the top, a navigation bar includes 'Dashboard', 'Open Invoices', 'Invoices', 'Payments', and 'AutoPay' (highlighted with a blue circle). Below this is a section titled '(DRAG TO REORDER)' containing a list of AutoPay rules. The first rule is 'AutoPay when Invoice Contract Is any of the following Platinum Managed Plan (\$2,750.00)'. This rule is configured with the following settings:

- 1** Payment Methods: Wild Eagle Checking
- 2** Run AutoPay: On Due Date
- 3** Autopay Type: Contract
- 4** Contract: Platinum Managed Plan (\$2,750.00)

At the bottom of the rule configuration, there are buttons for 'ADVANCED', 'DELETE', and 'UNDO CHANGES'. Below the rule list, there is a second rule: 'AutoPay when Invoice Amount Is less than 1000.00'. At the bottom of the interface, a message states: '*By saving, you are authorizing all of the above payments according to their criterion.' Below this message are three buttons: 'NEW' (highlighted with a red arrow), 'CANCEL', and 'SAVE' (highlighted with a green square labeled '5').

- 1 - Select the payment method you want this rule to follow
- 2 - "On Due Date" will pay invoices matching the criteria on the date they are due (not created)
- 3 - Select "Contract" or "Amount"
- 4 - Pick the recurring service agreement you would like to be auto-paid
- 5 - Save your changes!

Mobile

Mobile device navigation:

- The top menu bar is replaced by the lower right button, but functions nearly the same.

