

PORTAL INTRODUCTION

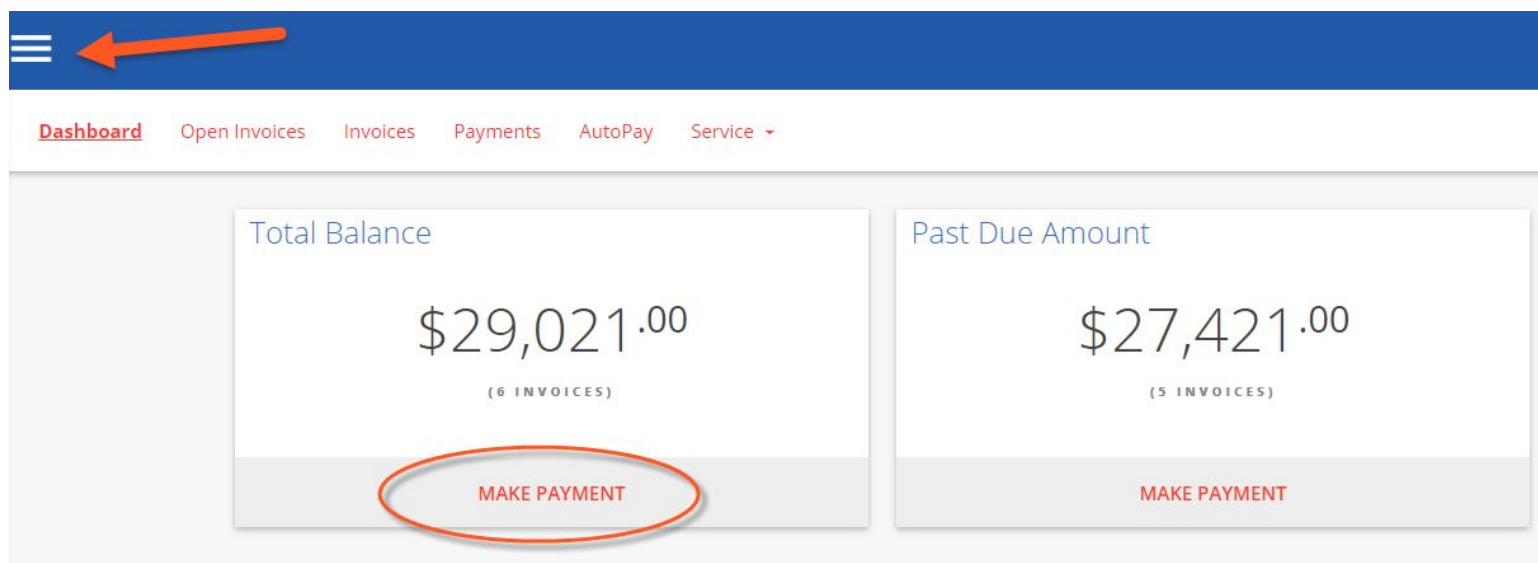
A Quick “How-To” Guide

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.



The screenshot shows a dashboard interface with a blue header bar. On the left side of the header bar, there is a three-bar menu icon (hamburger menu) with an orange arrow pointing to it from the left. Below the header bar, there is a navigation menu with the following items: [Dashboard](#), [Open Invoices](#), [Invoices](#), [Payments](#), [AutoPay](#), and [Service](#) with a dropdown arrow. Below the navigation menu, there are two main tiles. The left tile is titled "Total Balance" and displays "\$29,021.00" with "(6 INVOICES)" below it. The right tile is titled "Past Due Amount" and displays "\$27,421.00" with "(5 INVOICES)" below it. Both tiles have a "MAKE PAYMENT" button at the bottom. The "MAKE PAYMENT" button on the left tile is circled in orange.

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

QUICK ACTIONS

	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

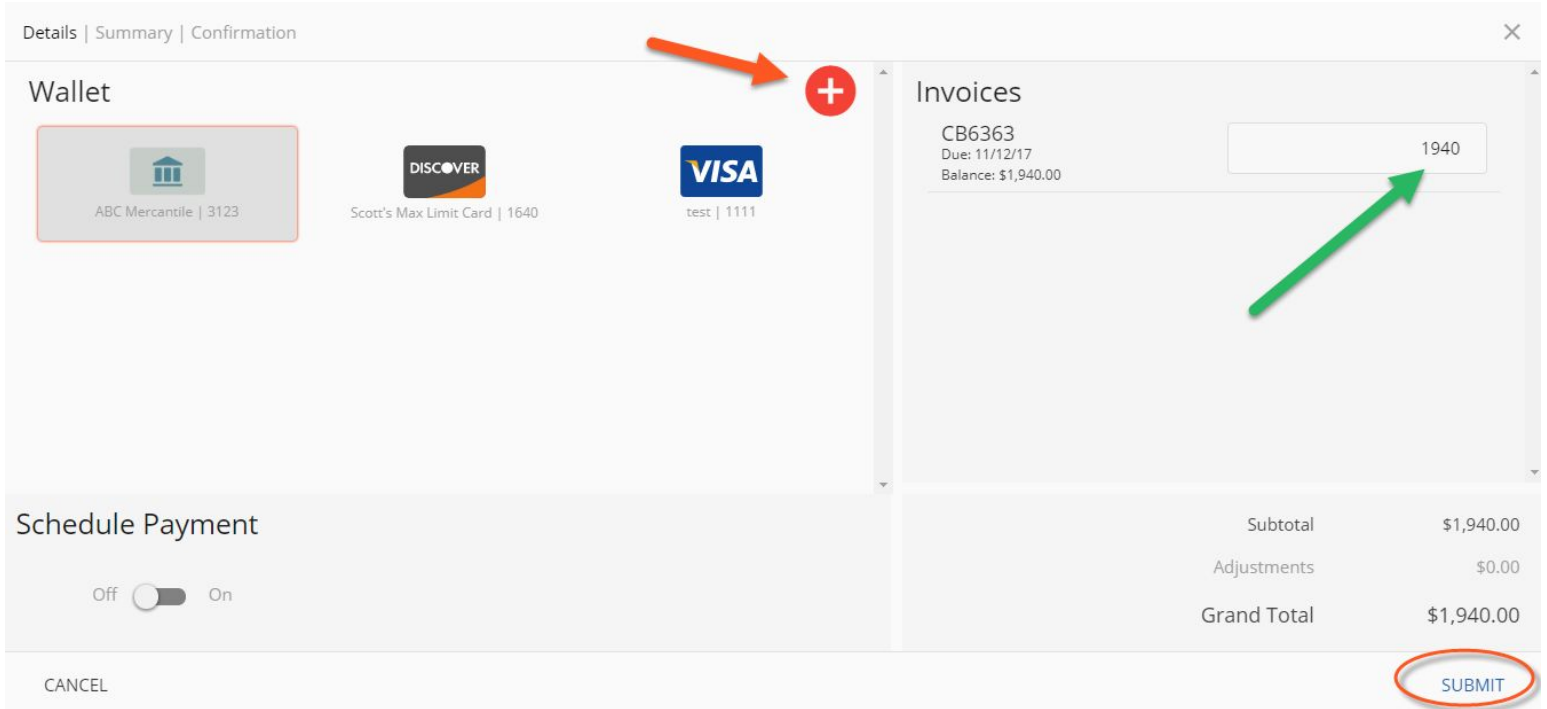
The screenshot shows a details window for invoice CB6363. The window has a blue header with the invoice number and key statistics. Below the header is a summary table with columns for Invoice Number, Amount, and Transaction Date. At the bottom of the window, there are three buttons: 'PAY', 'VIEW', and 'CLOSE'. The 'PAY' button is circled in red, and a green arrow points to the 'VIEW' button.

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

Buttons: **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

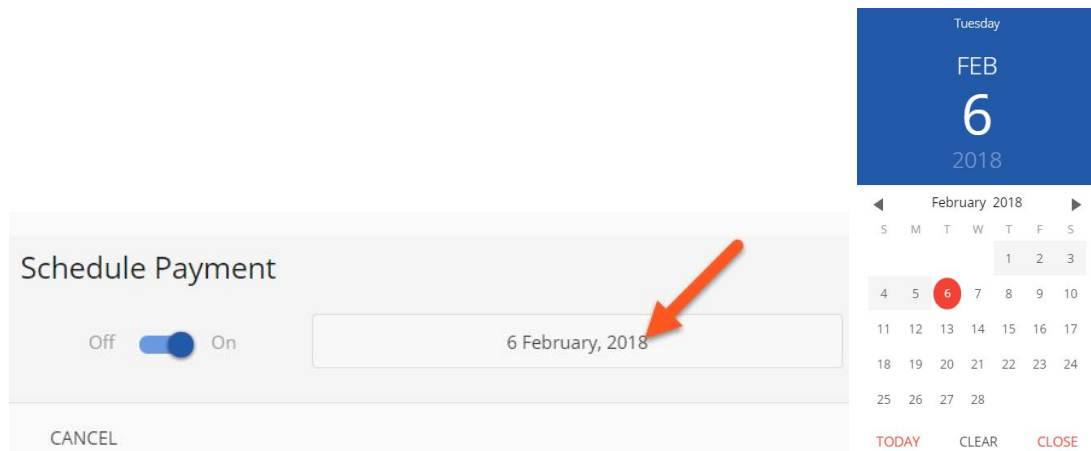
CANCEL

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

Tuesday
FEB
6
2018

February 2018

S M T W T F S

1 2 3

4 5 6 7 8 9 10

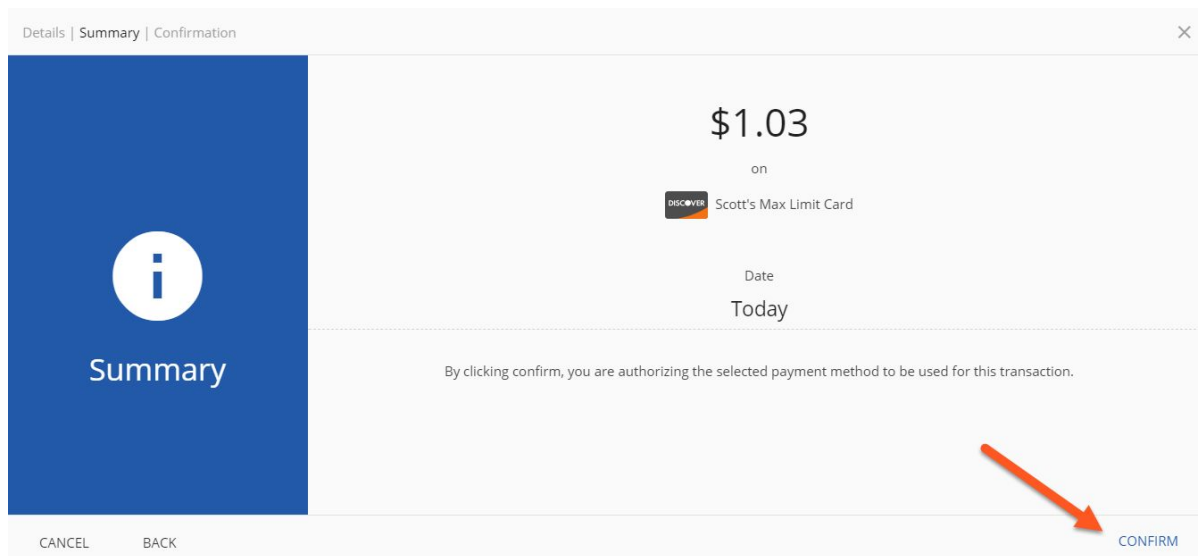
11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28

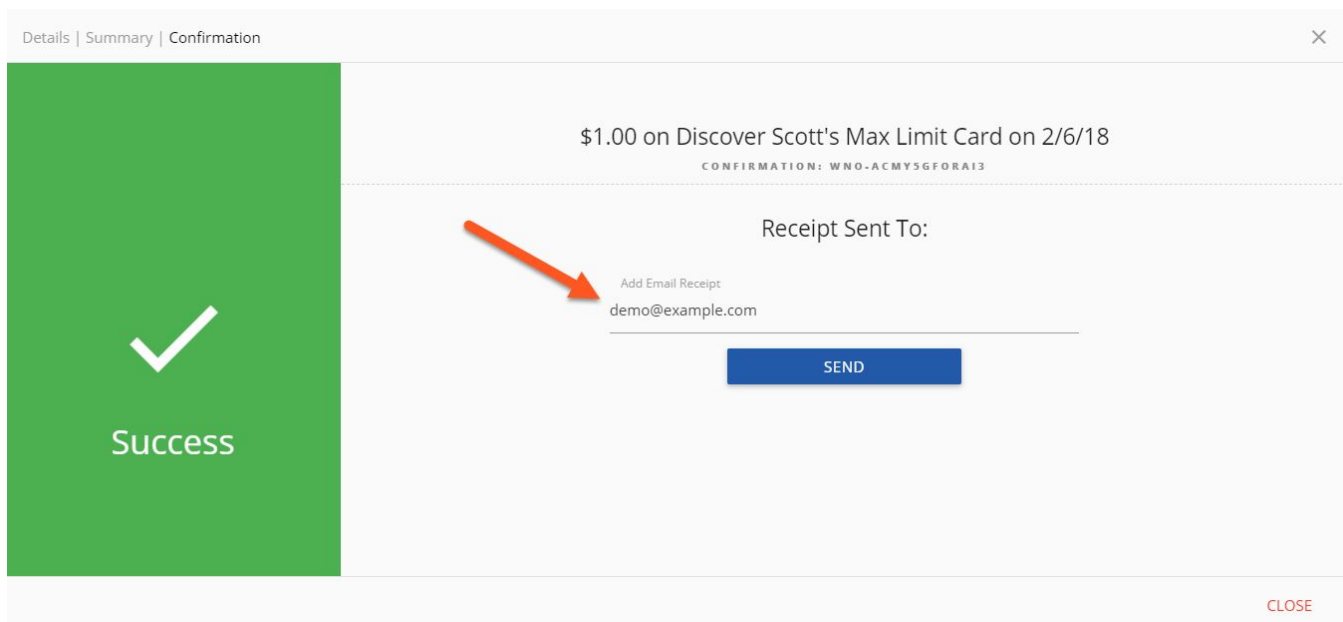
TODAY CLEAR CLOSE

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



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

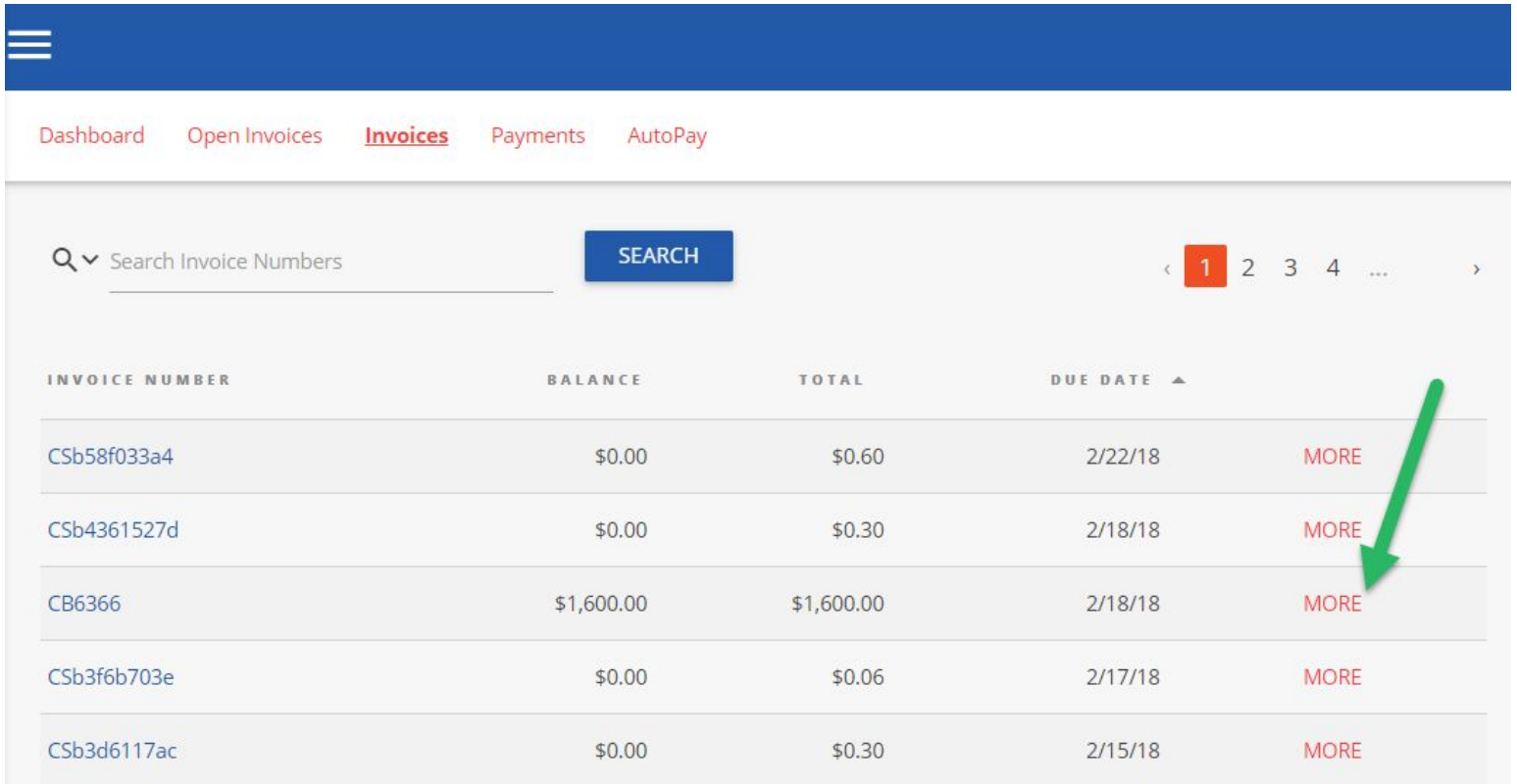
- An email receipt will be sent to your login email address.
 - You may send any additional receipts using the "Add Email Receipt" field.
- If the payment is scheduled for the future, the receipt will show the scheduled payment date.



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




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, there is a navigation bar with the following items: Dashboard, Open Invoices, Invoices, Payments, and AutoPay (which is circled in blue). Below the navigation bar, there is a section titled "(DRAG TO REORDER)".

The first rule is titled "AutoPay when Invoice Contract Is any of the following Platinum Managed Plan (\$2,750.00)". It has a lock icon on the left and a pencil icon on the right. The rule is configured with the following settings:

- Payment Methods: Wild Eagle Checking (marked with a green '1')
- Run AutoPay: On Due Date (marked with a green '2')
- Autopay Type: Contract (marked with a green '3')
- Contract: Matches Any (marked with a green '4')
- Contract: Platinum Managed Plan (\$2,750.00) (marked with a green '4')

At the bottom of the rule configuration, there are three buttons: ADVANCED, DELETE, and UNDO CHANGES.

The second rule is titled "AutoPay when Invoice Amount Is less than 1000.00".

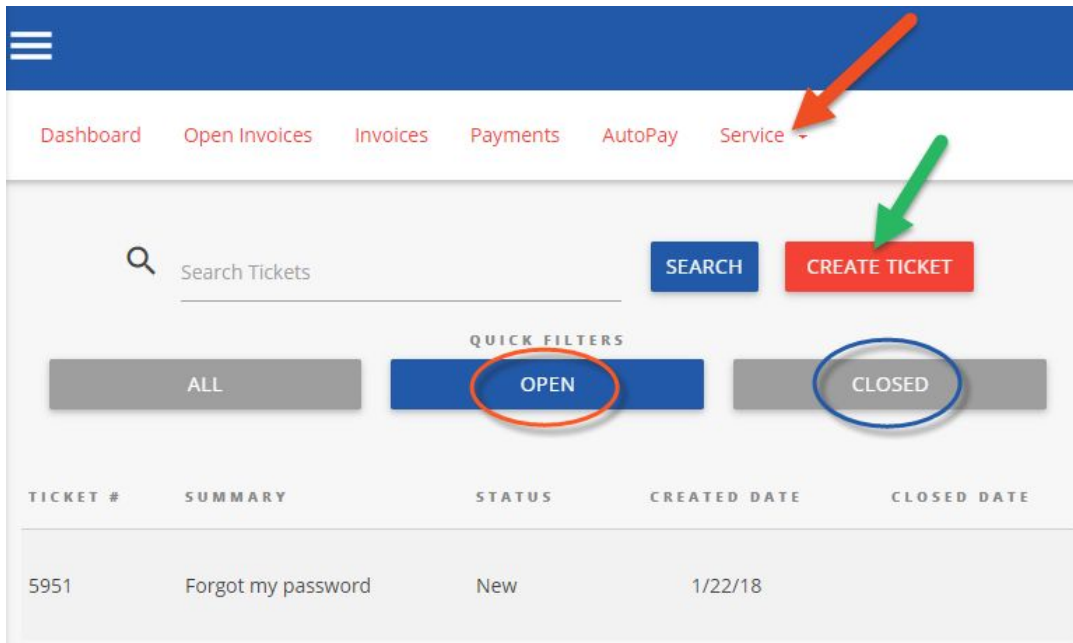
Below the rules, there is a confirmation message: "*By saving, you are authorizing all of the above payments according to their criterion." Below this message, there are three buttons: NEW (with a red arrow pointing to it), CANCEL, and SAVE (marked with a green '5').

- 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!

Service

Click on the “Service” menu option:

- Creating a new service ticket is easy as 1 2 3!
- You may also view historic tickets with the “Closed” filter.



The screenshot shows the "Submit a Ticket" form. It has three numbered steps: 1. Summary, 2. Choose department, and 3. Description. The "SUBMIT" button is highlighted with a red arrow.

Mobile

Mobile device navigation:

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

