

PORTAL INTRODUCTION

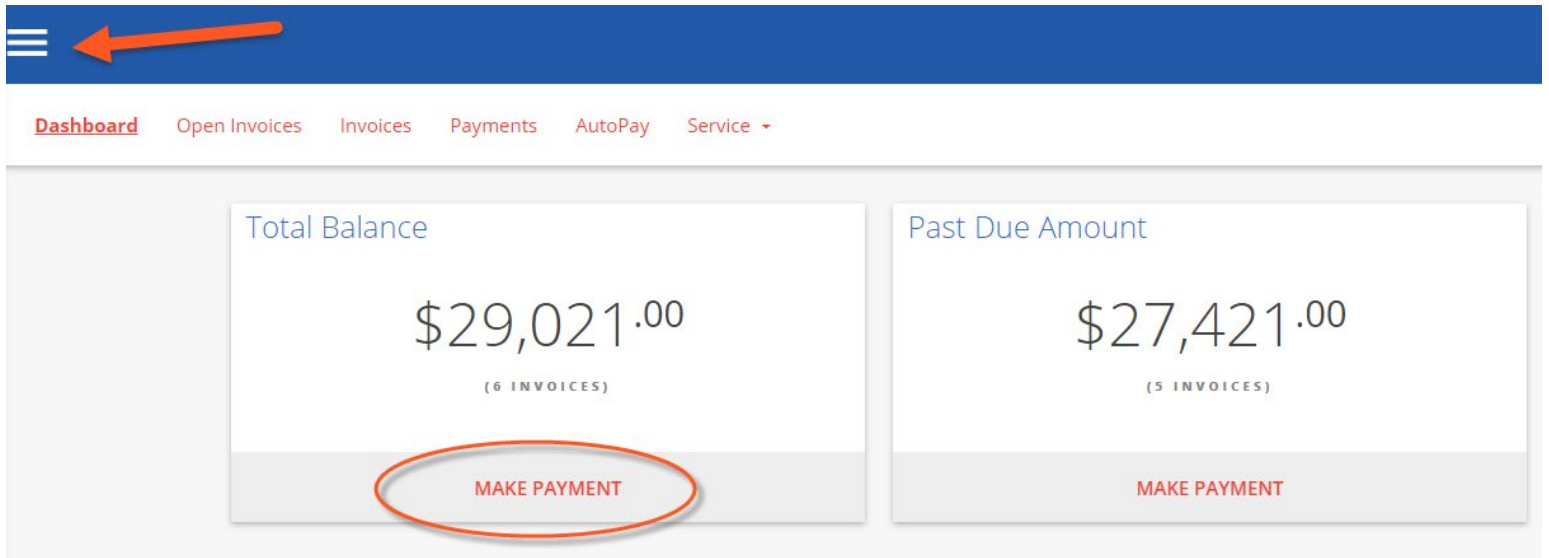
A Quick "How-To" Guide

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 the top navigation bar with a blue background and a white three-bar menu icon on the left. An orange arrow points to this icon. Below the navigation bar, the dashboard content is displayed. The navigation menu includes: [Dashboard](#) (highlighted), [Open Invoices](#), [Invoices](#), [Payments](#), [AutoPay](#), and [Service](#) with a dropdown arrow. The main content area features two summary tiles. The left tile is titled "Total Balance" and shows a balance of \$29,021.00 based on 6 invoices. The right tile is titled "Past Due Amount" and shows a past due amount of \$27,421.00 based on 5 invoices. Both tiles have a "MAKE PAYMENT" button at the bottom. The "MAKE PAYMENT" button in the "Total Balance" tile is circled in orange.

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

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

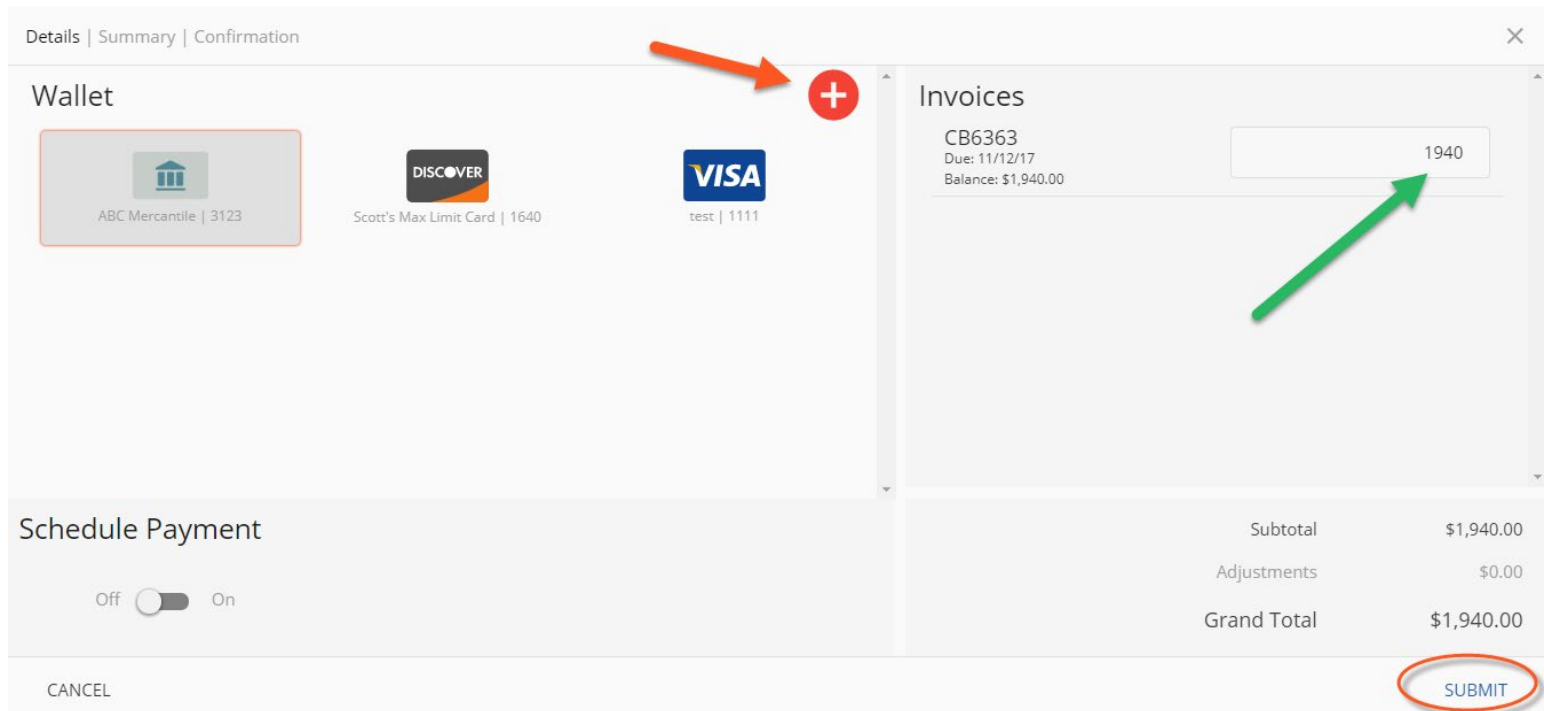
The screenshot shows a details window for invoice CB6363. The window has a blue header with the invoice number and key information. Below the header is a summary table with columns for INVOICE NUMBER, AMOUNT, TRANSACTION DATE, and a status icon. At the bottom of the window are buttons for PAY, VIEW, and CLOSE. A green arrow points to the VIEW button.

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

Buttons at the bottom: **PAY** (circled in red), **VIEW** (with a red eye icon), and **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

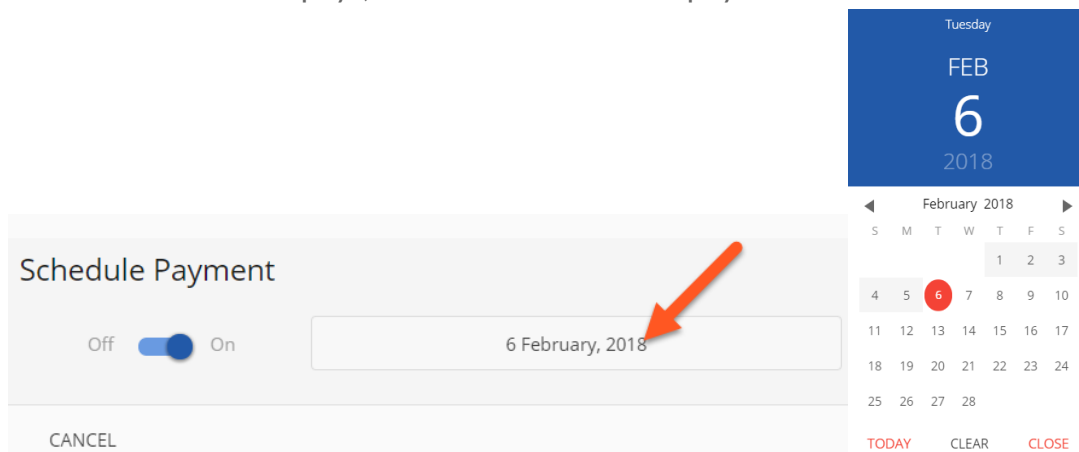
Adjustments \$0.00

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

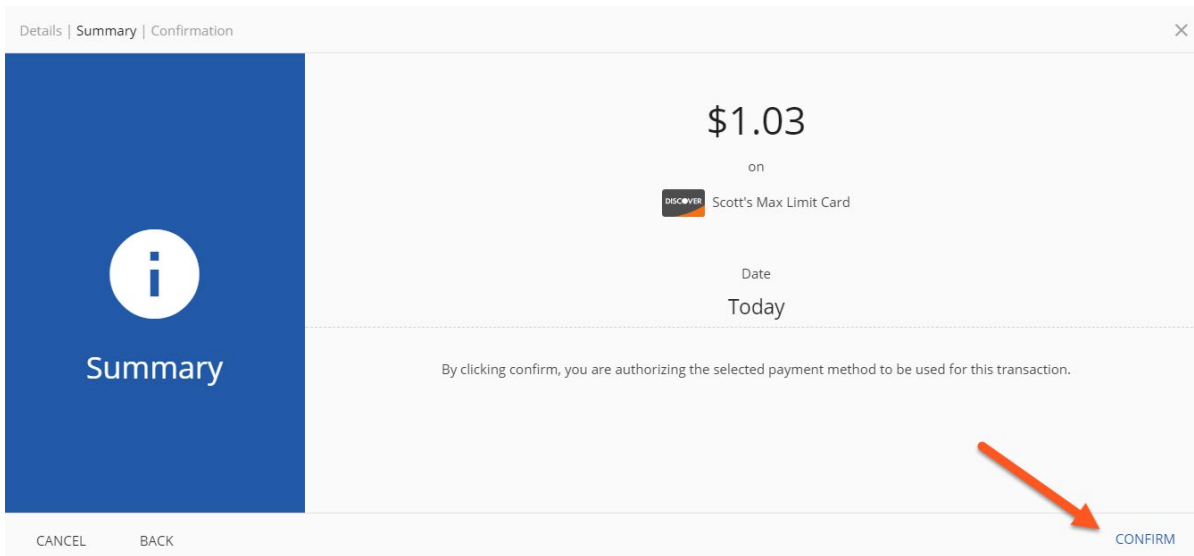
11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28

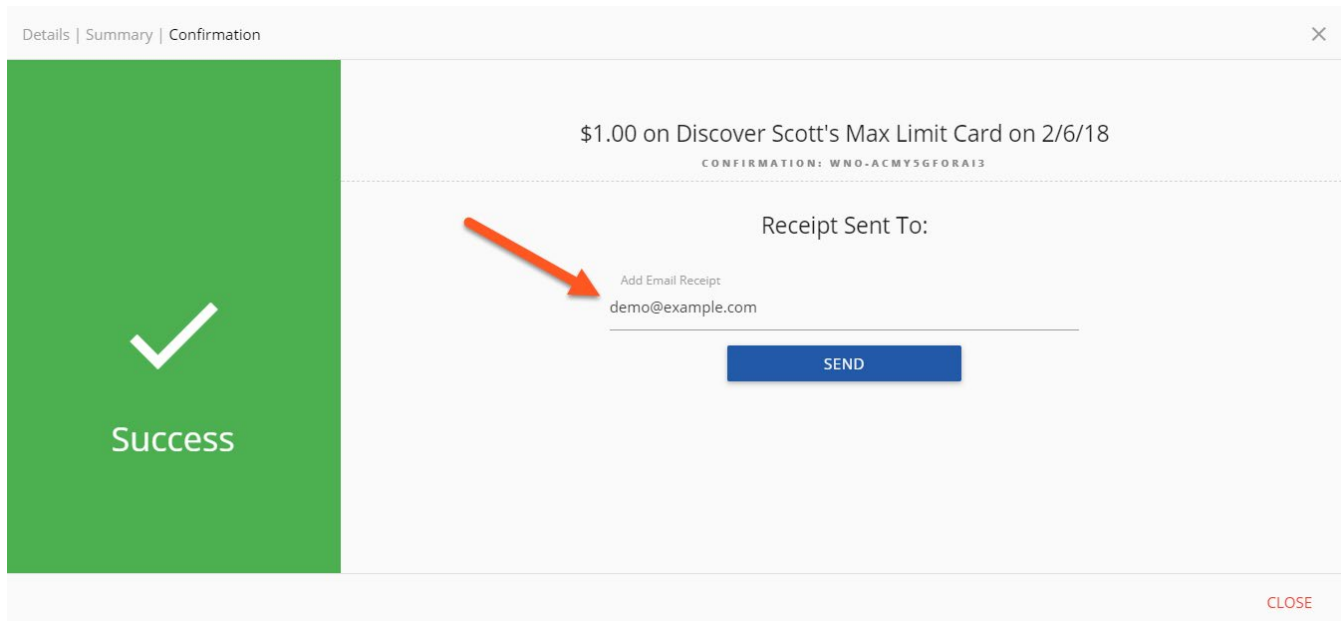
TODAY CLEAR CLOSE

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



[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!

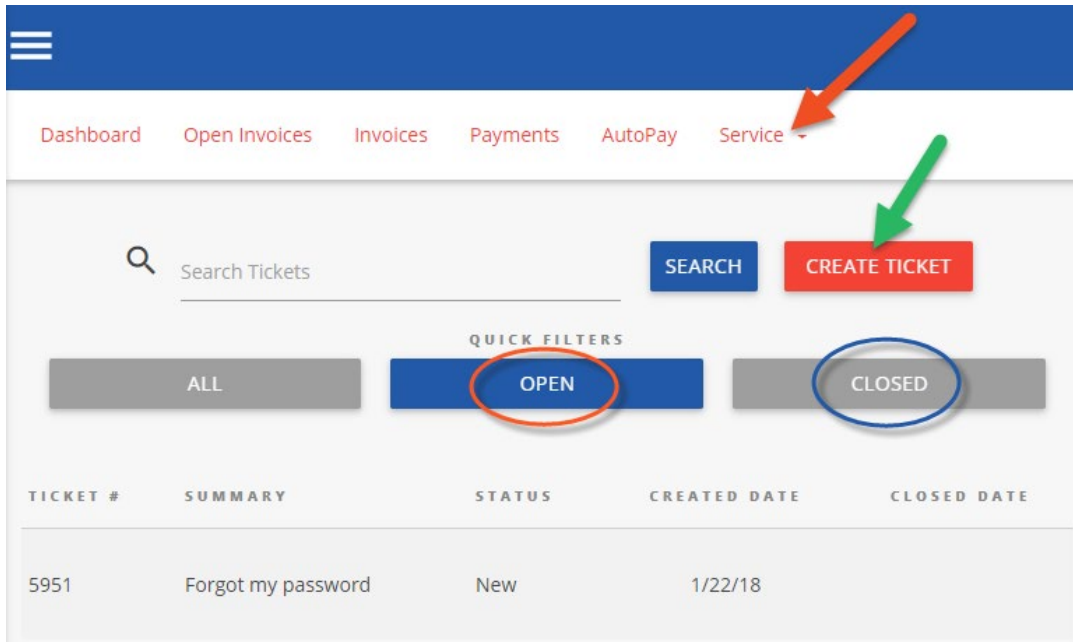
The screenshot shows the AutoPay configuration interface. At the top, there is a navigation bar with links for Dashboard, Open Invoices, Invoices, Payments, and AutoPay (which is circled in blue). Below the navigation bar, there is a section titled "(DRAG TO REORDER)". The main configuration area is divided into two sections. The first section 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. Below the title, there are two rows of configuration options. The first row is labeled "Payment Methods" and "Run AutoPay". The "Payment Methods" dropdown is set to "Wild Eagle Checking" (marked with a green '1') and the "Run AutoPay" dropdown is set to "On Due Date" (marked with a green '2'). The second row is labeled "Autopay Type" and "Contract". The "Autopay Type" dropdown is set to "Contract" (marked with a green '3') and the "Contract" dropdown is set to "Platinum Managed Plan (\$2,750.00)" (marked with a green '4'). Below these options, there are three buttons: "ADVANCED", "DELETE", and "UNDO CHANGES". The second section is titled "AutoPay when Invoice Amount Is less than 1000.00" and has a lock icon on the left. Below this section, there is a warning message: "*By saving, you are authorizing all of the above payments according to their criterion." Below the warning message, there are three buttons: "NEW" (blue), "CANCEL" (red), and "SAVE" (blue). A green '5' is next to the "SAVE" button. An orange arrow points to the "NEW" button.

- 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 form has a "CANCEL" button and a "SUBMIT" button. A red arrow points to the "SUBMIT" button.

Mobile

Mobile device navigation:

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

