

# PORTAL INTRODUCTION

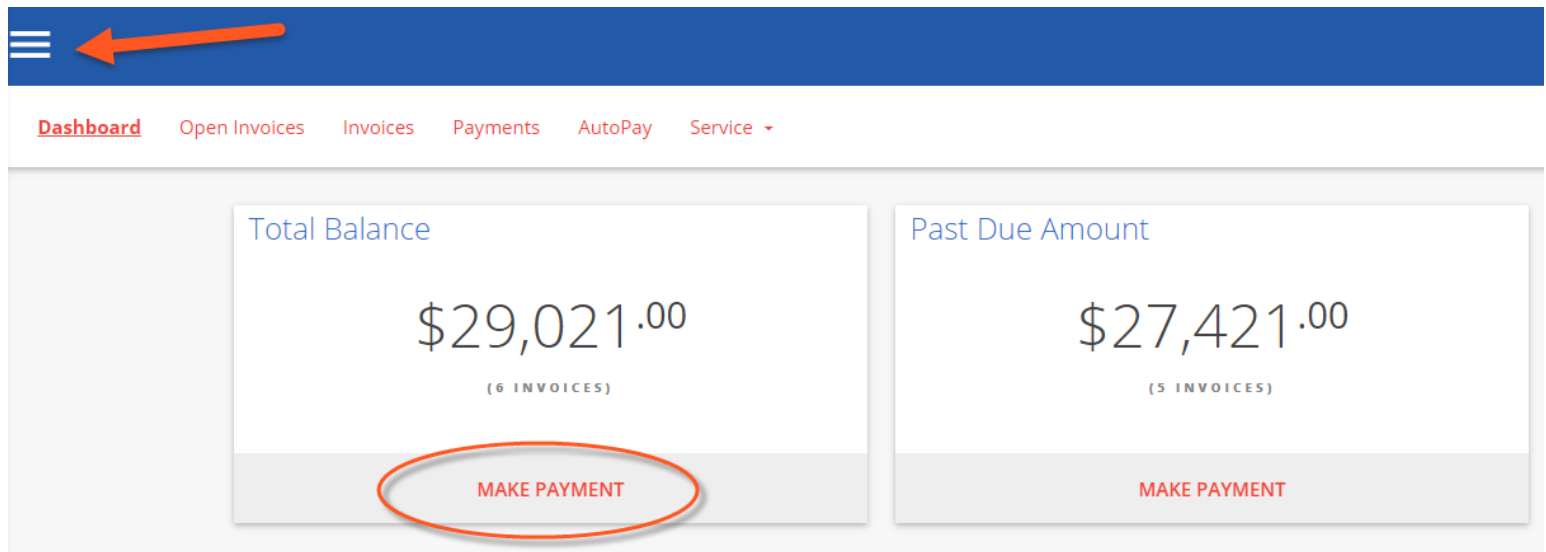
## A Quick "How-To" Guide

### 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. At the top, there is a blue navigation bar with a three-bar menu icon on the left, indicated by an orange arrow. Below the navigation bar, there is a horizontal menu with the following items: **Dashboard**, Open Invoices, Invoices, Payments, AutoPay, and Service (with a dropdown arrow). Below the navigation bar, there are two summary 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 in the "Total Balance" 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	<a href="#">MORE</a>
<input type="checkbox"/>	QBINV123486	\$3,814.00	\$7,500.00	10/28/17	<a href="#">MORE</a>
<input checked="" type="checkbox"/>	CB6363	\$1,940.00	\$2,000.00	11/12/17	<a href="#">MORE</a>
<input type="checkbox"/>	CB6364	\$1,960.00	\$2,000.00	11/12/17	<a href="#">MORE</a>

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

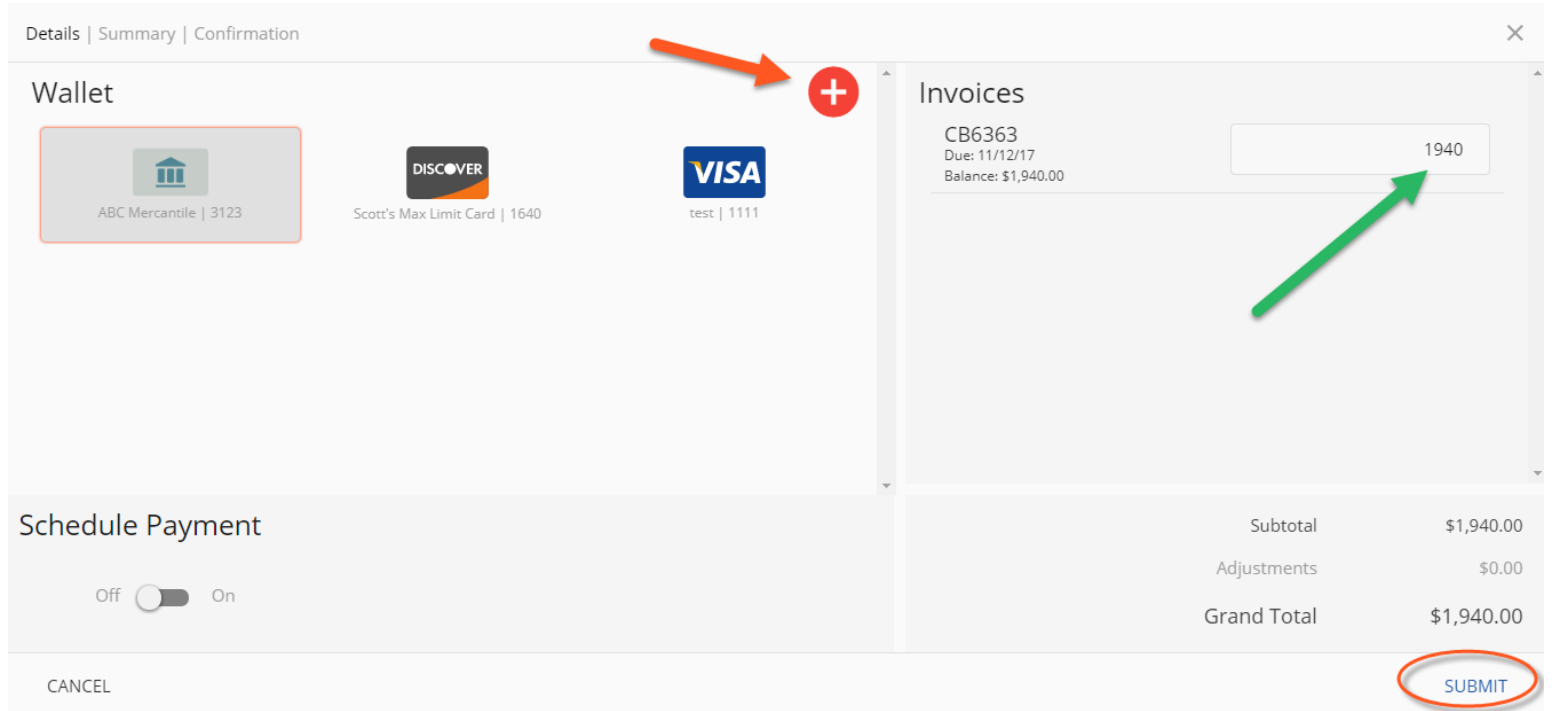
The screenshot shows a details window for invoice CB6363. The window has a blue header with the invoice number and key information. Below the header is a summary table with columns for Amount and Transaction Date. A green arrow points to the 'VIEW' button at the bottom of the window.

AMOUNT	TRANSACTION DATE	
\$30.00	2/15/18	
\$10.00	12/8/17	
\$25.00	12/13/17	
\$25.00	1/3/18	
\$17.00	1/3/18	

At the bottom of the window, there are three buttons: **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

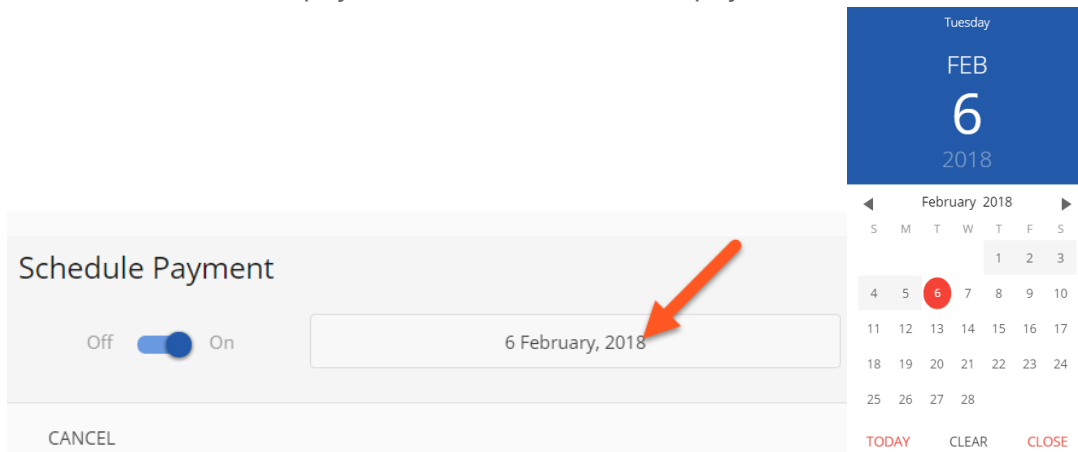
CANCEL

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

February 2018

Tuesday

FEB

6

2018

S M T W T F S

1 2 3

4 5 6 7 8 9 10

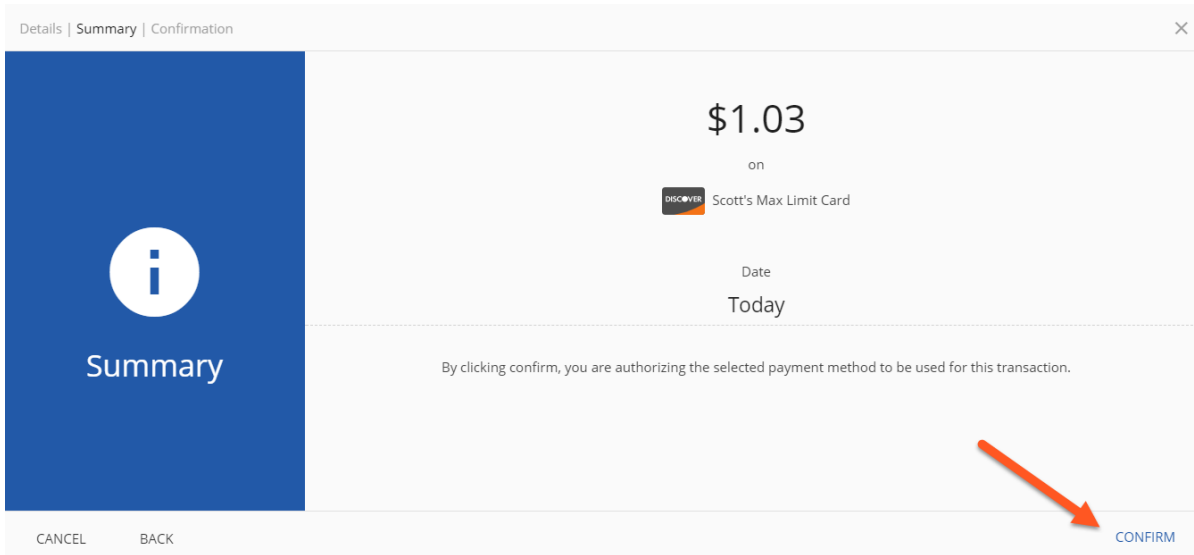
11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28

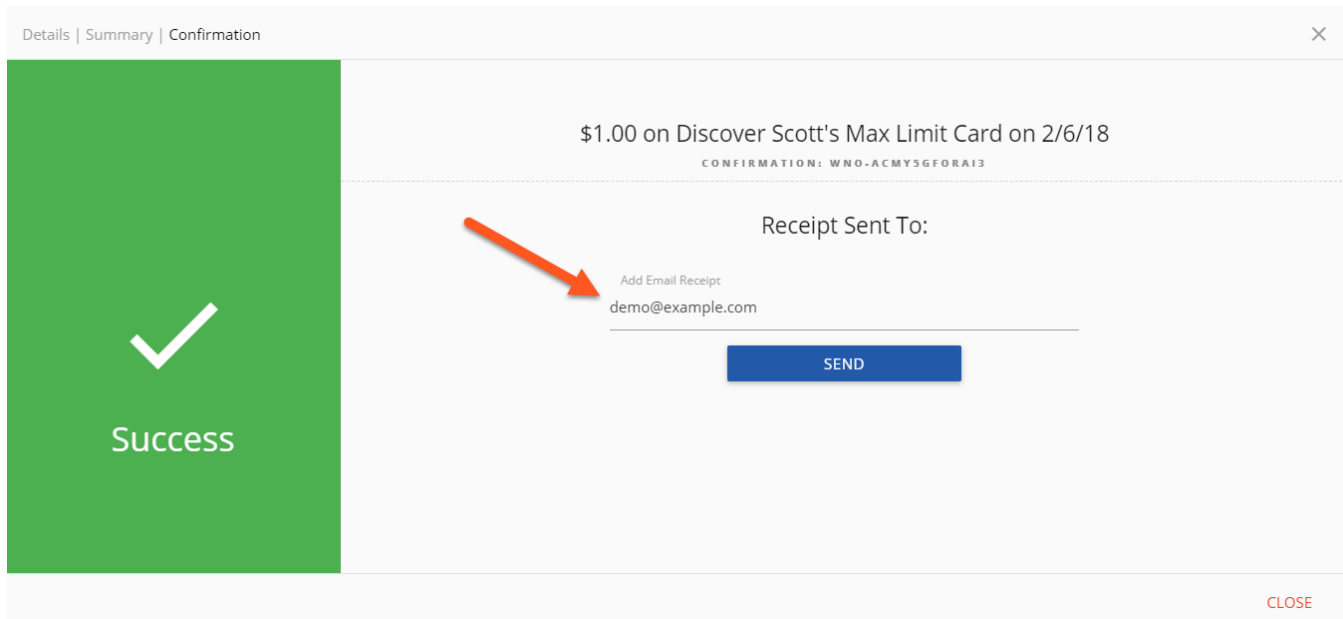
TODAY CLEAR CLOSE

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



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

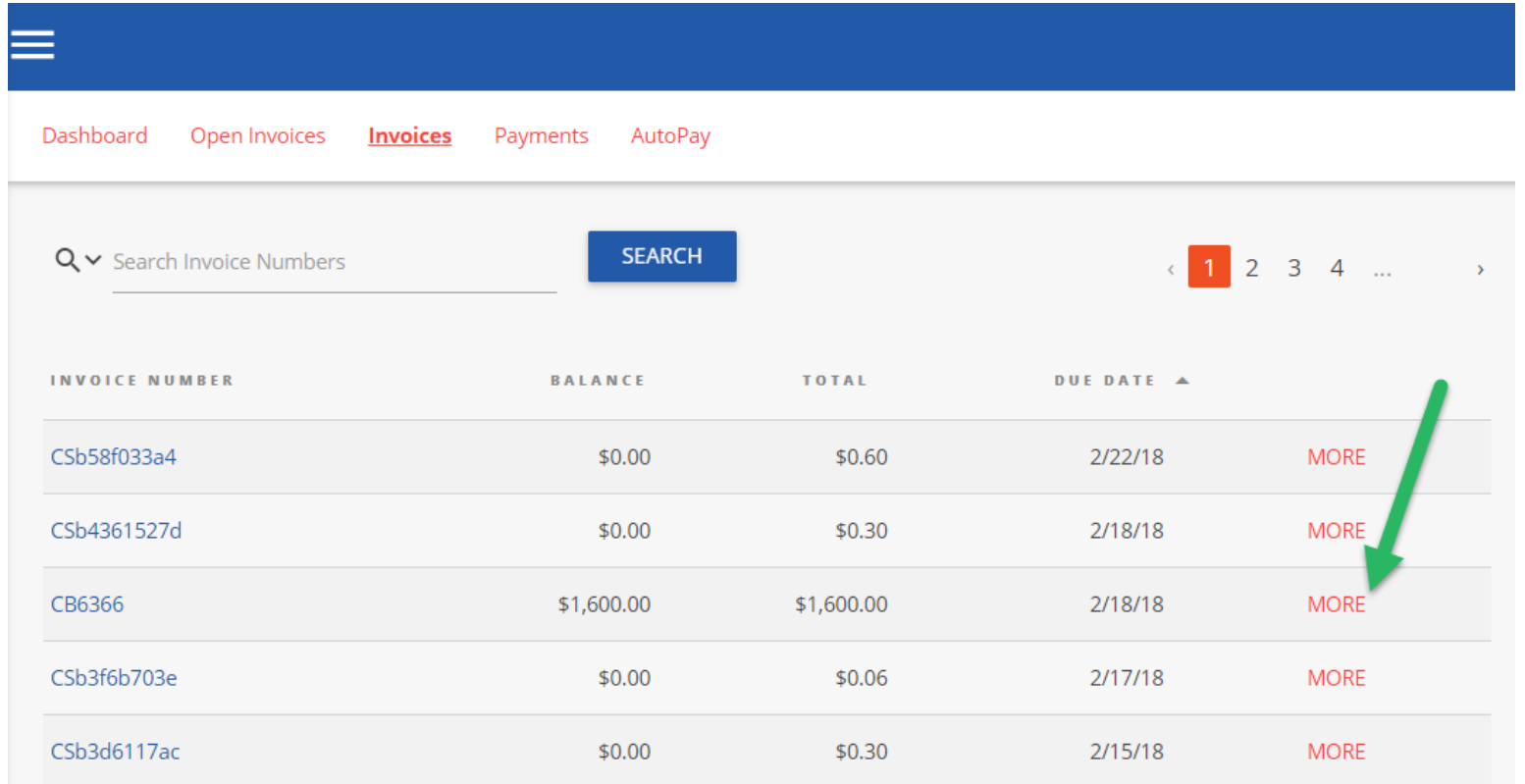
- An email receipt will be sent to your login email address.
  - You may send any additional receipts using the "Add Email Receipt" field.
- If the payment is scheduled for the future, the receipt will show the scheduled payment date.



## 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	<a href="#">MORE</a>
CSb4361527d	\$0.00	\$0.30	2/18/18	<a href="#">MORE</a>
CB6366	\$1,600.00	\$1,600.00	2/18/18	<a href="#">MORE</a>
CSb3f6b703e	\$0.00	\$0.06	2/17/18	<a href="#">MORE</a>
CSb3d6117ac	\$0.00	\$0.30	2/15/18	<a href="#">MORE</a>

# 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!

Dashboard Open Invoices Invoices Payments **AutoPay**

( DRAG TO REORDER )

AutoPay when Invoice Contract Is any of the following Platinum Managed Plan (\$2,750.00)

Payment Methods Run AutoPay

1 Wild Eagle Checking 2 On Due Date

Autopay Type 4 Contract

3 Contract Matches Any Platinum Managed Plan (\$2,750.00)

ADVANCED DELETE UNDO CHANGES

AutoPay when Invoice Amount Is less than 1000.00

\*By saving, you are authorizing all of the above payments according to their criterion.

NEW CANCEL SAVE 5

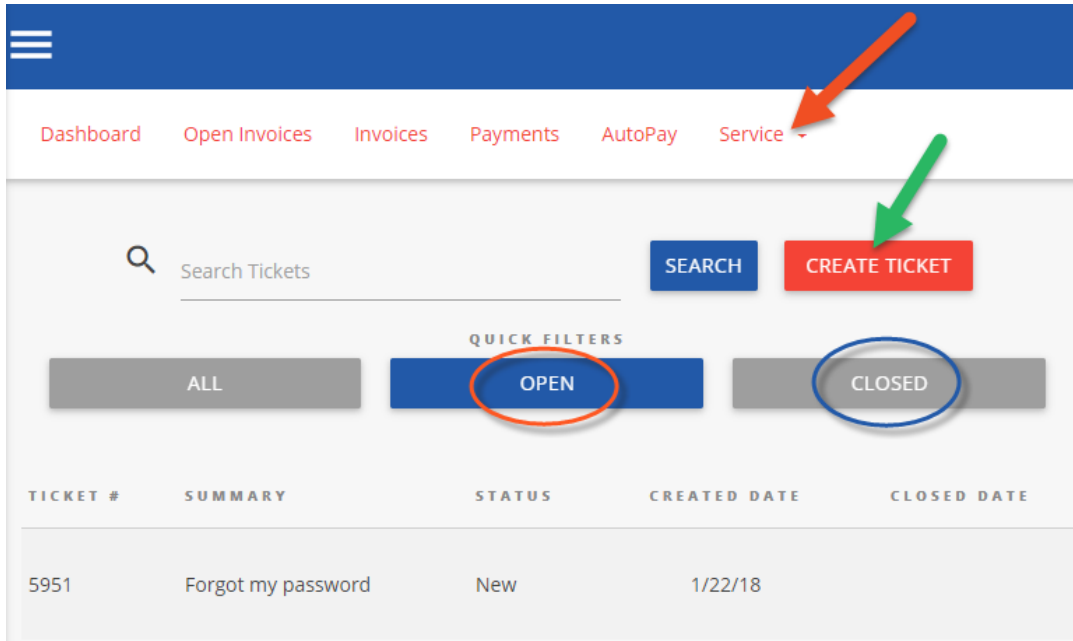
- 1 - Select the payment method you want this rule to follow
- 2 - "On Due Date" will pay invoices matching the criteria on the date they are due (not created)
- 3 - Select "Contract" or "Amount"
- 4 - Pick the recurring service agreement you would like to be auto-paid
- 5 - Save your changes!



## Service

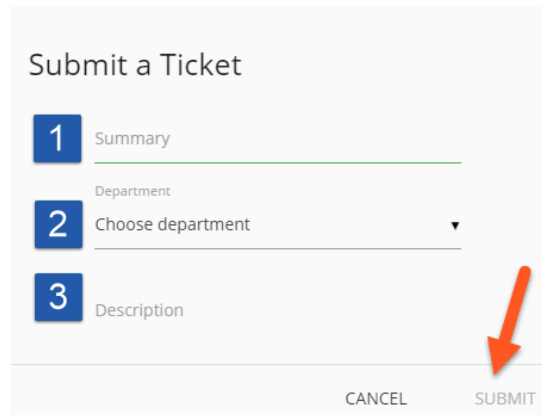
Click on the "Service" menu option:

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



The screenshot shows a navigation menu with options: Dashboard, Open Invoices, Invoices, Payments, AutoPay, and Service. An orange arrow points to the Service menu. Below the menu is a search bar with a magnifying glass icon and the text "Search Tickets". To the right of the search bar are two buttons: "SEARCH" (blue) and "CREATE TICKET" (red). A green arrow points to the "CREATE TICKET" button. Below the search bar is a "QUICK FILTERS" section with three buttons: "ALL" (grey), "OPEN" (blue, circled in orange), and "CLOSED" (grey, circled in blue). Below the filters is a table with the following columns: TICKET #, SUMMARY, STATUS, CREATED DATE, and CLOSED DATE. The table contains one row with the following data: 5951, Forgot my password, New, 1/22/18.

TICKET #	SUMMARY	STATUS	CREATED DATE	CLOSED DATE
5951	Forgot my password	New	1/22/18	








The screenshot shows the "Submit a Ticket" form. It has three numbered steps: 1. Summary (with a text input field), 2. Choose department (with a dropdown menu), and 3. Description (with a text input field). At the bottom of the form are two buttons: "CANCEL" and "SUBMIT". An orange 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.

- Autopay 
- Payments 
- Invoice History 
- Open Invoices 
- Dashboard 
- 