PORTAL INTRODUCTION
A Quick "How-To" Guide

Viewing + Paying Invoices

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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
$534.02	$0.00
(2 INVOICES)	(0 INVOICES)
Make Payment	**Make Payment**

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Open Invoices

Click the "OPEN INVOICES" menu option:

$Pay Selected

- ◆ 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 for and click "Pay Selected".
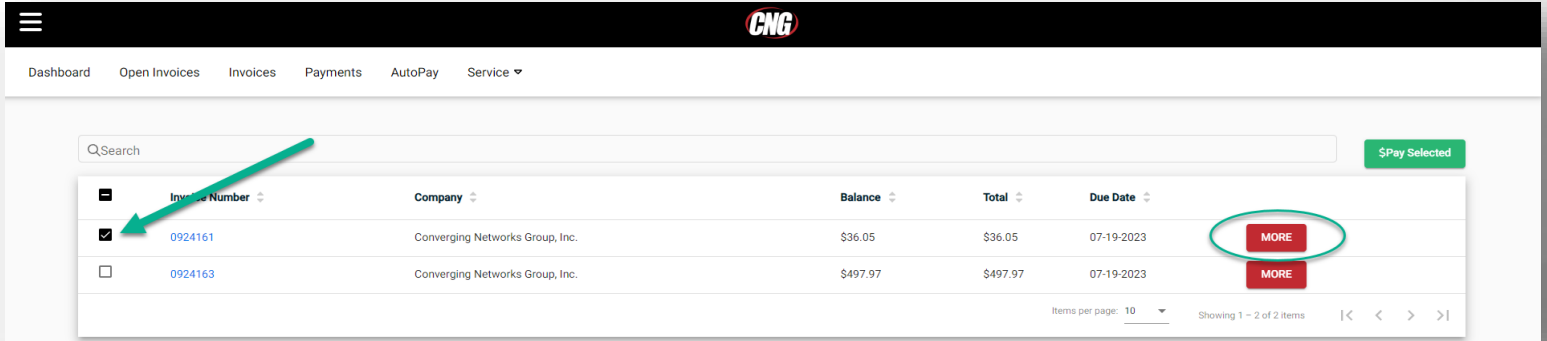
Clicking "MORE" on any invoice will display a details window:

- ◆ 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

To Process a Payment:

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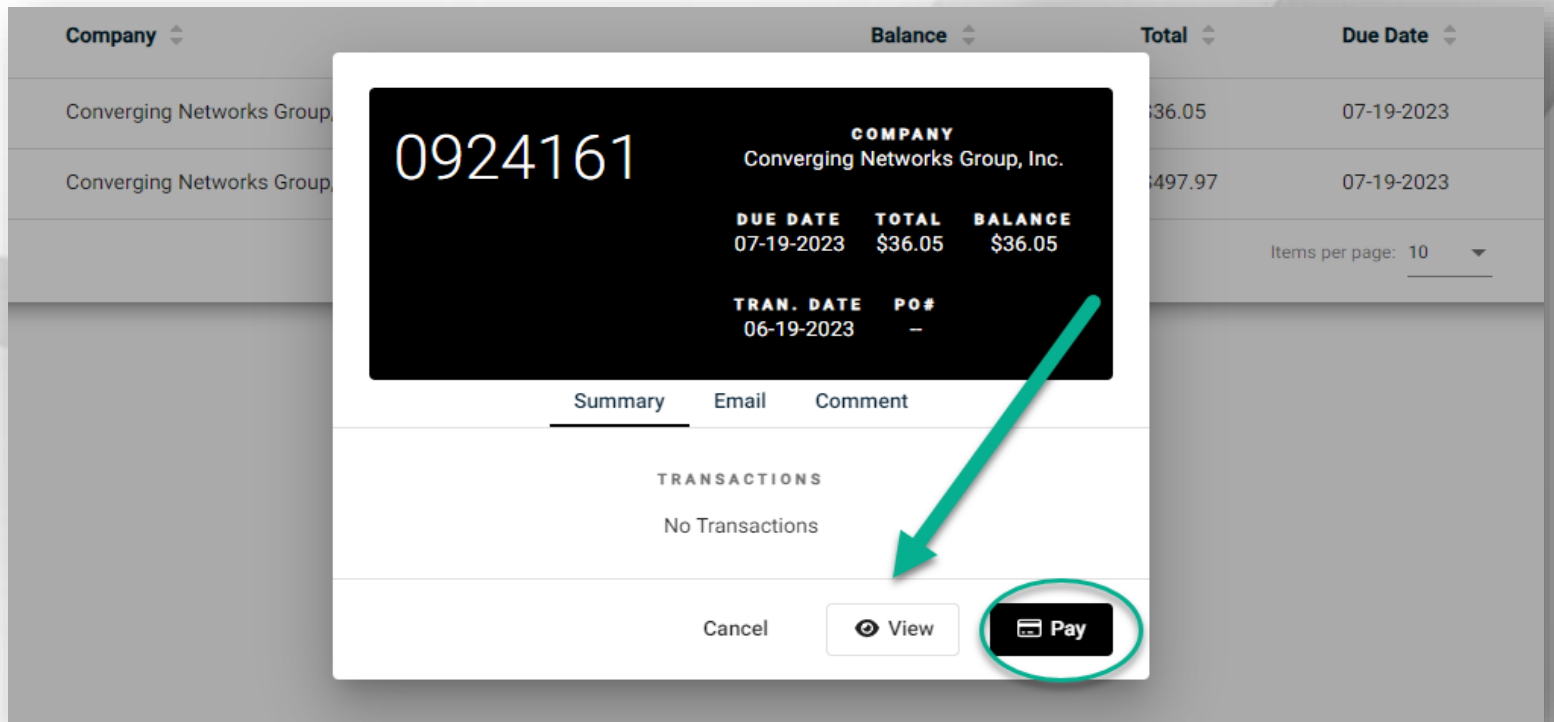
♦ Select the checkbox of one (or multiple) invoice(s). Click "PAY SELECTED"
  ○ A dialog will appear: please select a payment method on file, or add a new entry.
    ■ Partial payment amounts can be entered in the top right corner!
    ■ You have the option of splitting payments up with multiple payment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

① Details —————————— ② Summary —————————— ③ Confirmation

Wallet

+

Invoices

Select Payment Method

0924161
Due: 07-19-2023
Balance: $36.05

Amount *

36.05

⌄

Schedule Payment

Subtotal$36.05

🔘 On

Grand Total$36.05

📅

Cancel

Next

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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.

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.

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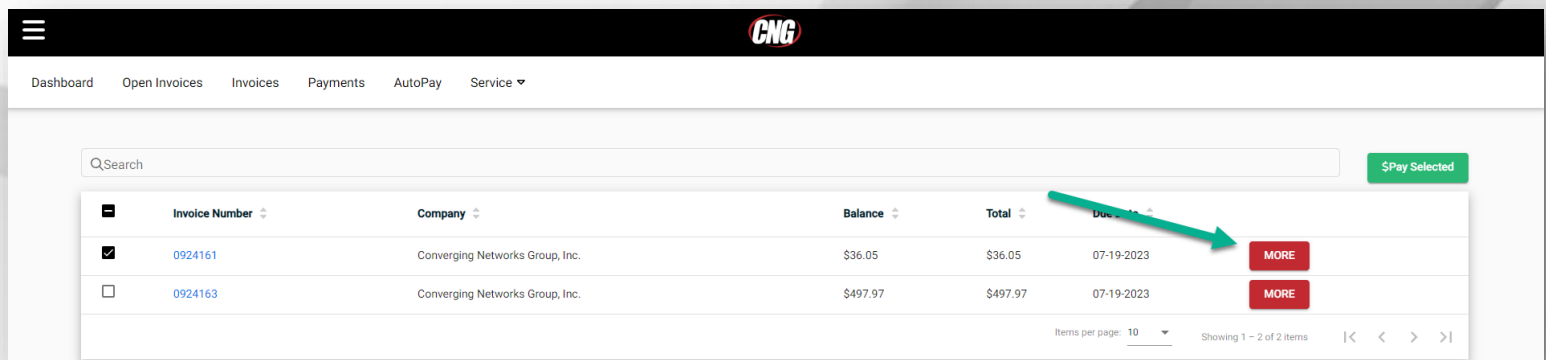
Invoice History

Click on the "Invoices" menu option:

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

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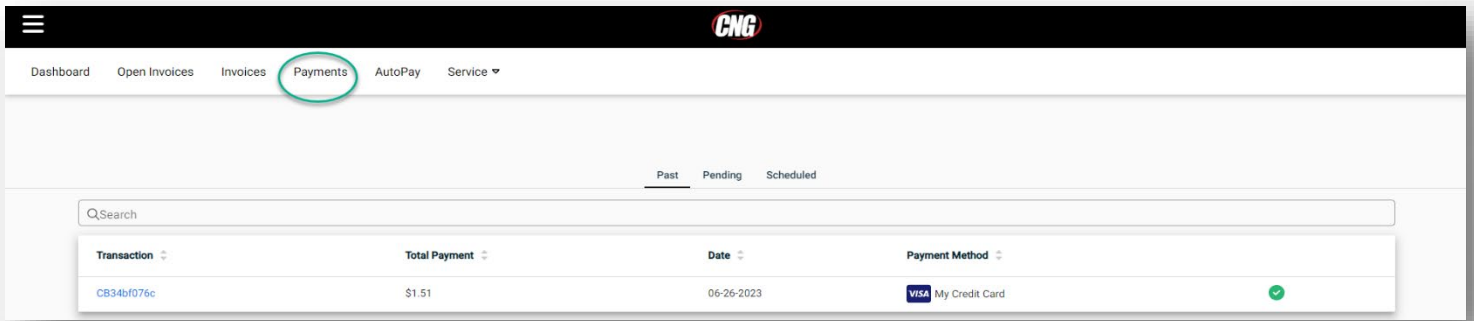
Payments

Click on the PAYMENTS menu option:

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

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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!
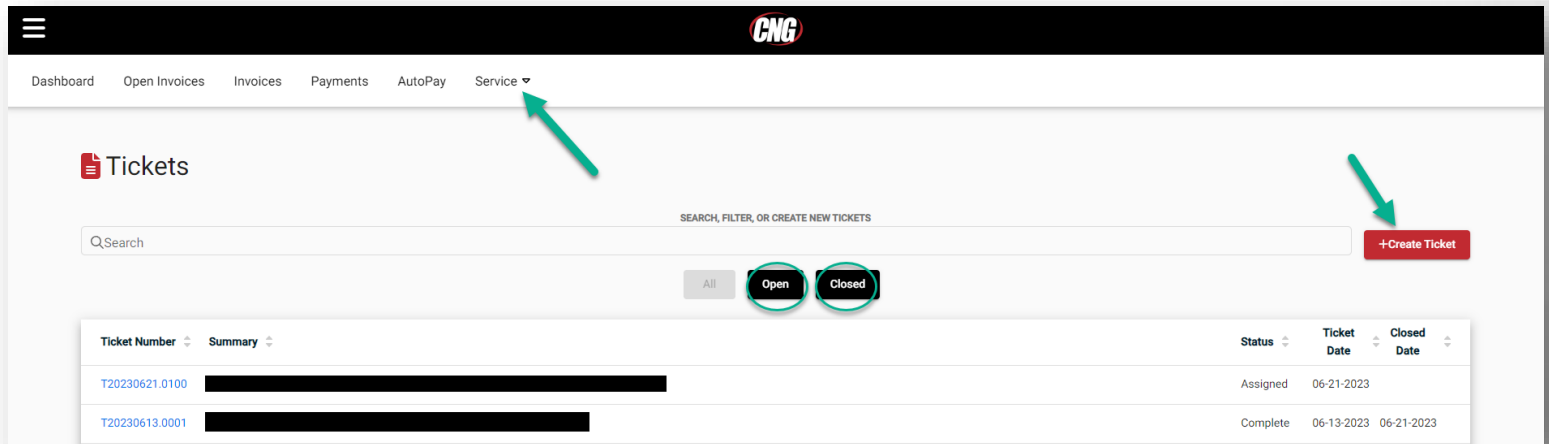

1. Select the payment method you want this rule to follow

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!

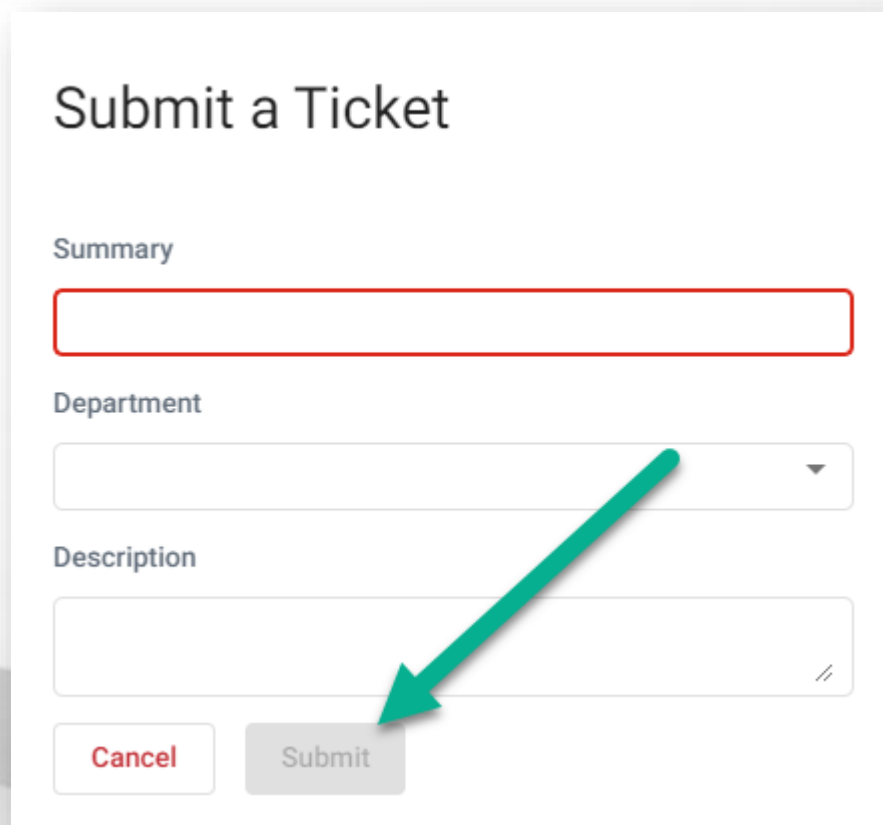We're an extension of your team.

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.

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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	⊞

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