



PORTAL INTRODUCTION

A Quick "How-To" Guide

Viewing + Paying Invoices

finance.consultcng.com

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.

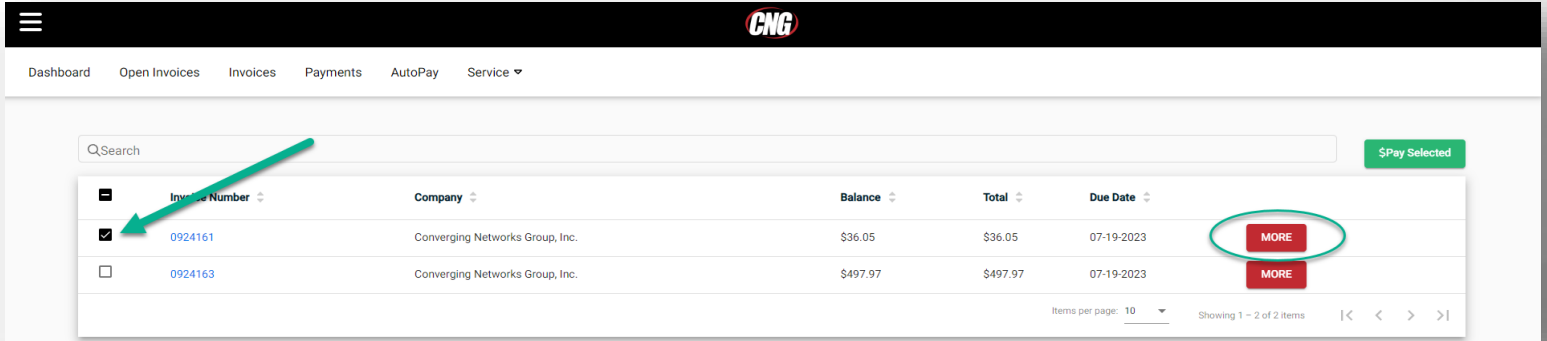
The screenshot shows the CNG portal dashboard. At the top left, there is a three-bar menu icon with a red arrow pointing to it. The top right corner features the CNG logo. Below the navigation bar, there are two main tiles. The left tile is titled "Total Balance" and displays "\$534.02" with "(2 INVOICES)" underneath. A red "Make Payment" button is at the bottom of this tile, circled in red. The right tile is titled "Past Due Amount" and displays "\$0.00" with "(0 INVOICES)" underneath. It also has a red "Make Payment" button at the bottom.

Open Invoices

Click the "OPEN INVOICES" menu option:

\$Pay Selected

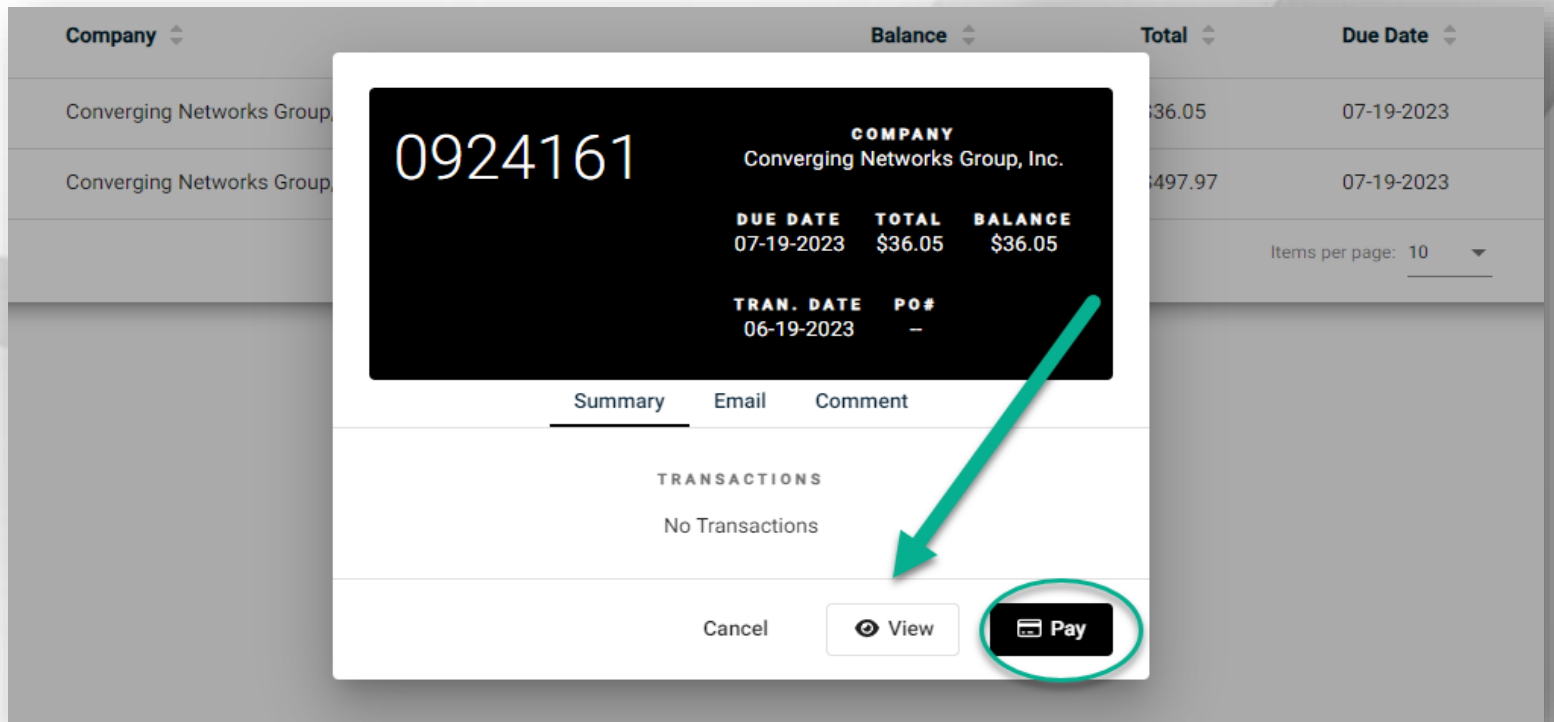
- ◆ All currently open invoices in our system are listed here. Please let us know if items are missing!
 - If needed, you may conveniently sort & filter with the three-bar button.
 - Select the items you wish to pay for and click "Pay Selected".



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:



- ◆ 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

Select Payment Method

Invoices

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

Amount *
36.05

Schedule Payment

On

Subtotal \$36.05

Grand Total \$36.05

Cancel

Next

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.

1 Details | 2 Summary | 3 Confirmation

< June 2023 >

Su	Mo	Tu	We	Th	Fr	Sa
JUN				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	29	30	

06-26-2023

0924161 Amount * 36.05

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

Subtotal \$36.05

Grand Total \$36.05

Cancel Next

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

1 Details | 2 Summary | 3 Confirmation

Total Payment: \$1.51

Payment Method: My Credit Card (*9940)

Payment Date: Today


By clicking confirm, you are authorizing the selected payment method to be used for this transaction.

Back Confirm

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.

Details Summary 3 Confirmation




Payment Successful

Payment Details
\$1.51
My Credit Card -- 06-26-2023

Confirmation

Receipt Sent to:

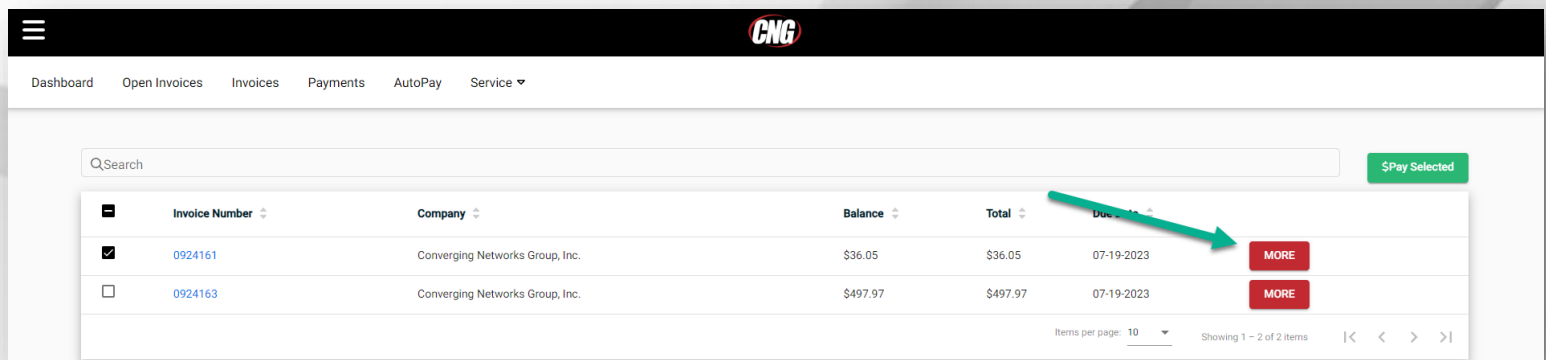
Send copy: 

Close

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 Service ▾

QSearch \$Pay Selected

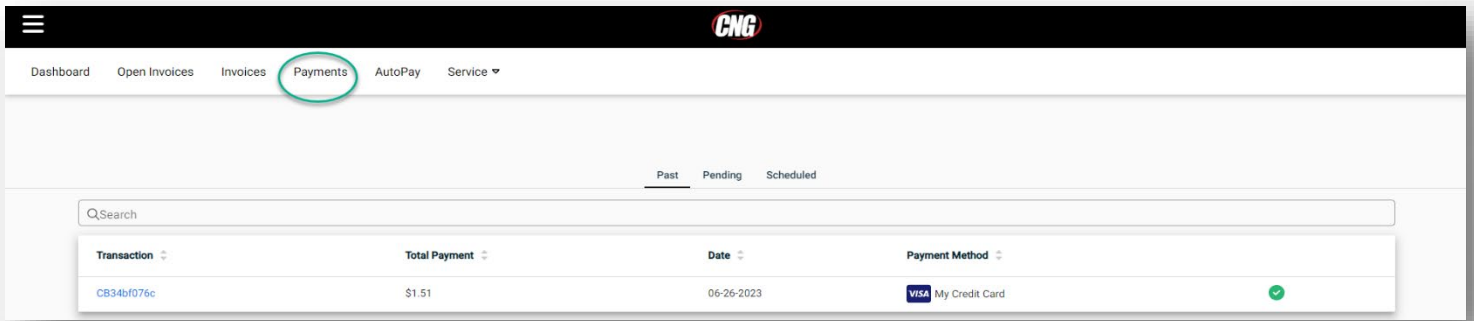
<input type="checkbox"/>	Invoice Number	Company	Balance	Total	Due Date	MORE
<input checked="" type="checkbox"/>	0924161	Converging Networks Group, Inc.	\$36.05	\$36.05	07-19-2023	MORE
<input type="checkbox"/>	0924163	Converging Networks Group, Inc.	\$497.97	\$497.97	07-19-2023	MORE

Items per page: 10 Showing 1 - 2 of 2 items |< < > >|

Payments

Click on the PAYMENTS menu option:

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



The screenshot displays the CNG Payments interface. At the top, a navigation menu includes 'Dashboard', 'Open Invoices', 'Invoices', 'Payments' (circled in green), 'AutoPay', and 'Service'. Below the menu is a search bar labeled 'Q:Search'. Underneath the search bar are three tabs: 'Past', 'Pending', and 'Scheduled'. A table of payment transactions is shown below the tabs. The table has four columns: 'Transaction', 'Total Payment', 'Date', and 'Payment Method'. A single transaction is listed with a transaction ID of 'CB34bf076c', a total payment of '\$1.51', a date of '06-26-2023', and a payment method of 'VISA My Credit Card'. A green checkmark is visible in the rightmost column of the table.

Transaction	Total Payment	Date	Payment Method
CB34bf076c	\$1.51	06-26-2023	VISA My Credit Card

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** Service ▾

UNLOCKED (DRAG TO REORDER) ⓘ

AutoPay when the contract is any of the following: "0.MNS - Co-Managed - Sandbox MSP" and the amount is less than \$1,000.00

Payment Methods: My Credit Card **1**

Run AutoPay: On Due Date **2**

Autopay Type: the contract **3** Criteria: is any of the following: The Contract: 0.MNS - Co-Managed - Sandbox MSP **4**

Autopay Type: the amount Criteria: is less than The Amount: 1000.00

Basic Disable Undo Changes Delete Save

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

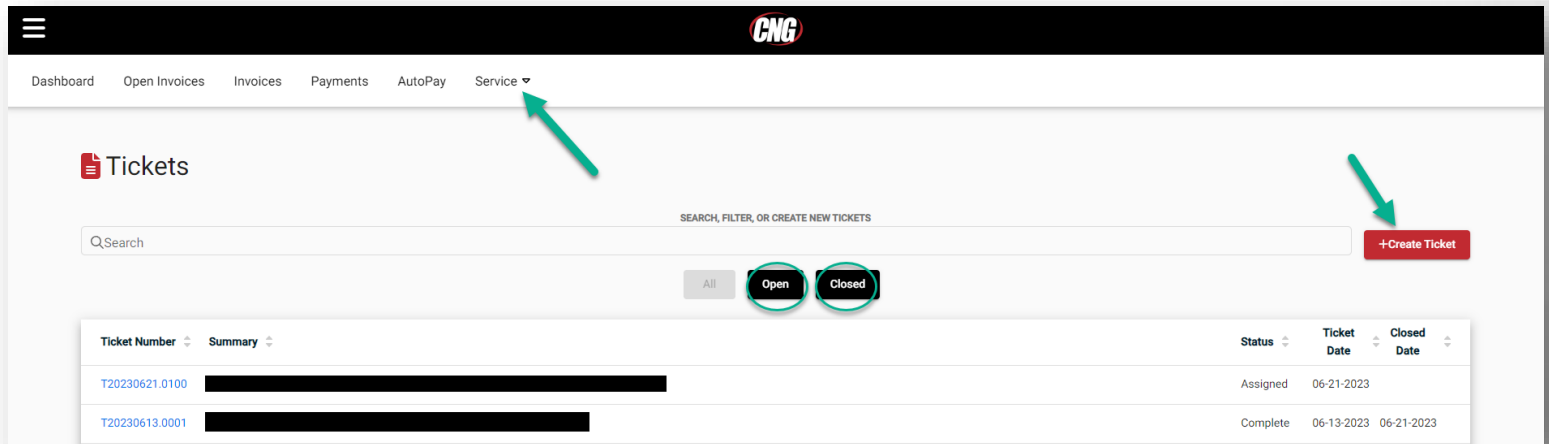
+ New Cancel All Save All

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

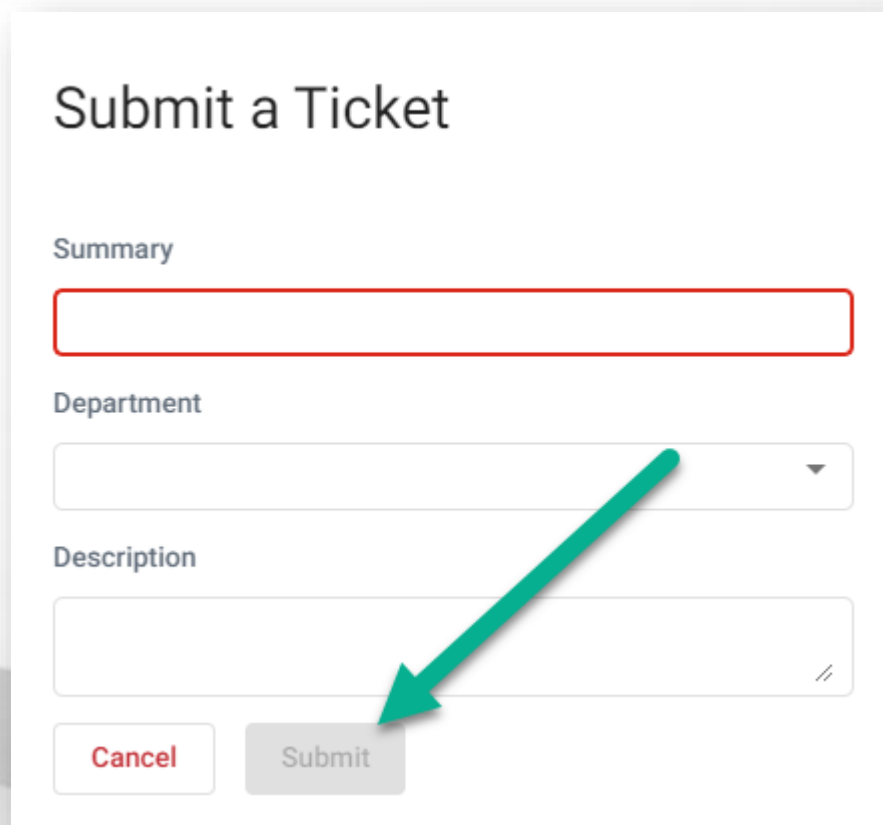
Click on the "Service" menu option:

- ◆ 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 CNG dashboard with a navigation bar containing: Dashboard, Open Invoices, Invoices, Payments, AutoPay, and Service. A green arrow points to the Service menu. Below the navigation bar is a 'Tickets' section with a search bar labeled 'QSearch' and a '+Create Ticket' button. A green arrow points to the '+Create Ticket' button. Below the search bar are filter buttons for 'All', 'Open', and 'Closed', with 'Open' and 'Closed' circled in green. A table of tickets is displayed below the filters:

Ticket Number	Summary	Status	Ticket Date	Closed Date
T20230621.0100	[REDACTED]	Assigned	06-21-2023	
T20230613.0001	[REDACTED]	Complete	06-13-2023	06-21-2023



Submit a Ticket

Summary

Department

Description

Cancel **Submit**

A green 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.

