

PORTAL INTRODUCTION

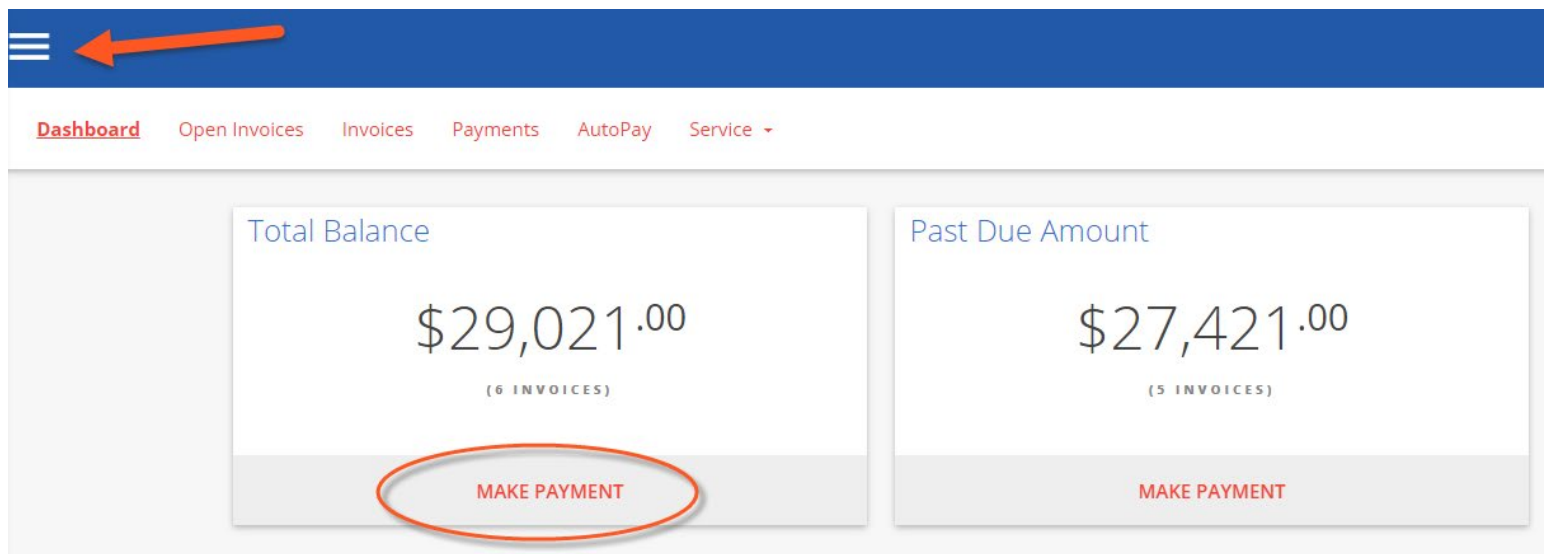
A Quick "How-To" Guide

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). The main content area features 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	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

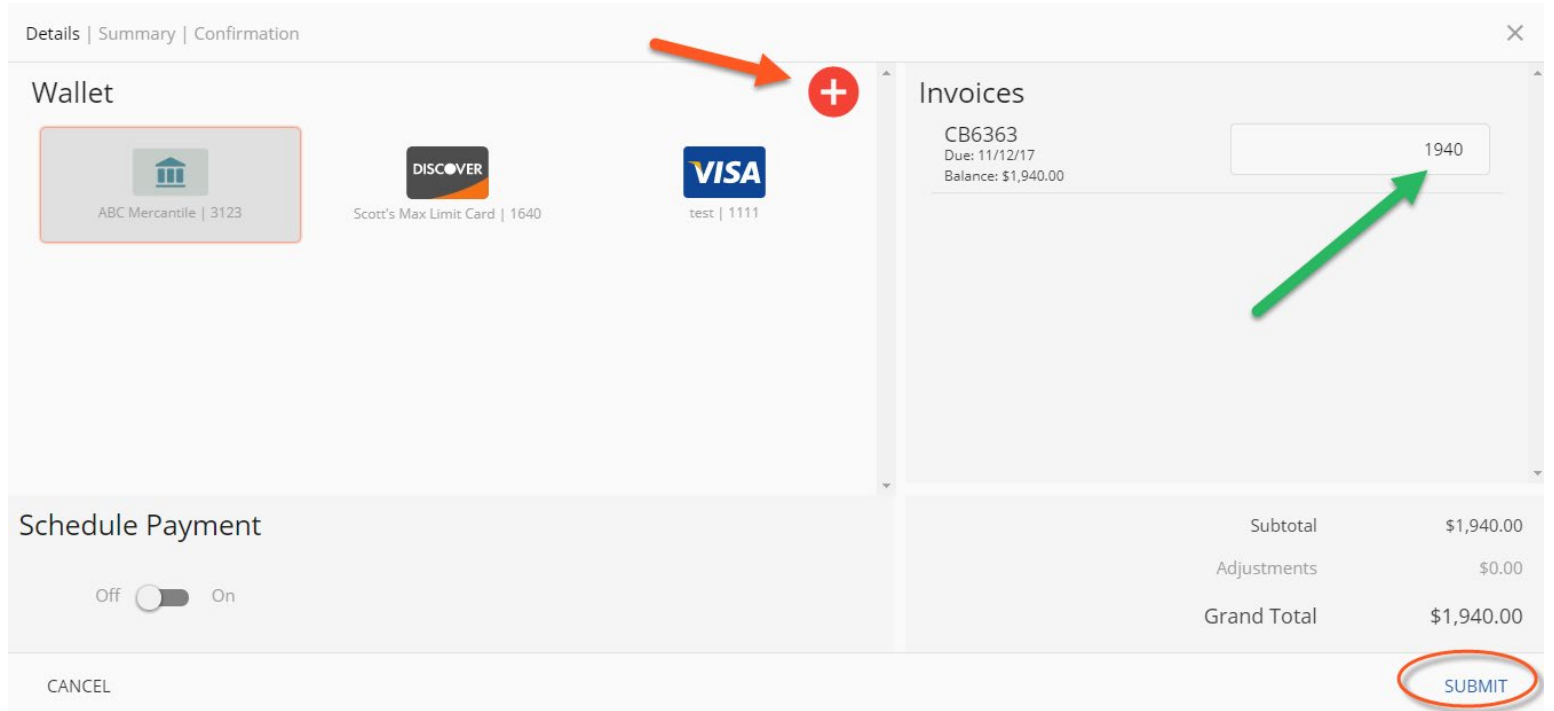
The screenshot shows a details window for invoice CB6363. The window has a blue header with the invoice number and key information. Below the header is a summary table with columns for Amount and Transaction Date. A green arrow points to the 'VIEW' button at the bottom of the window.

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

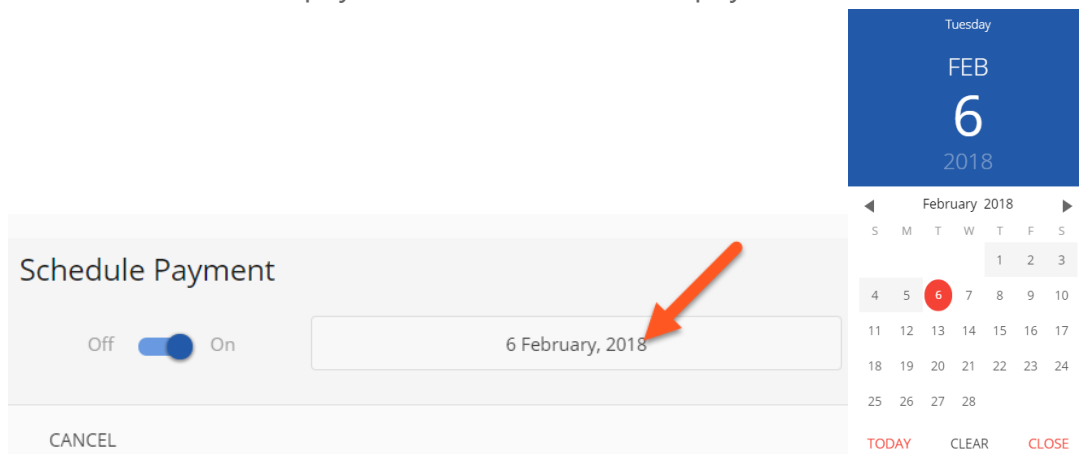
CANCEL

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

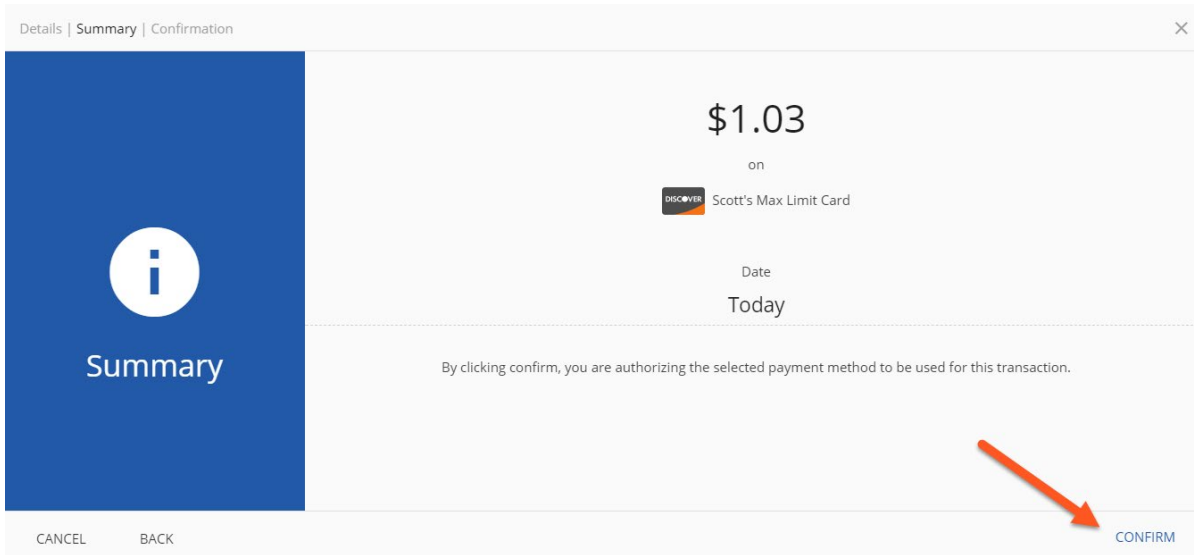
11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28

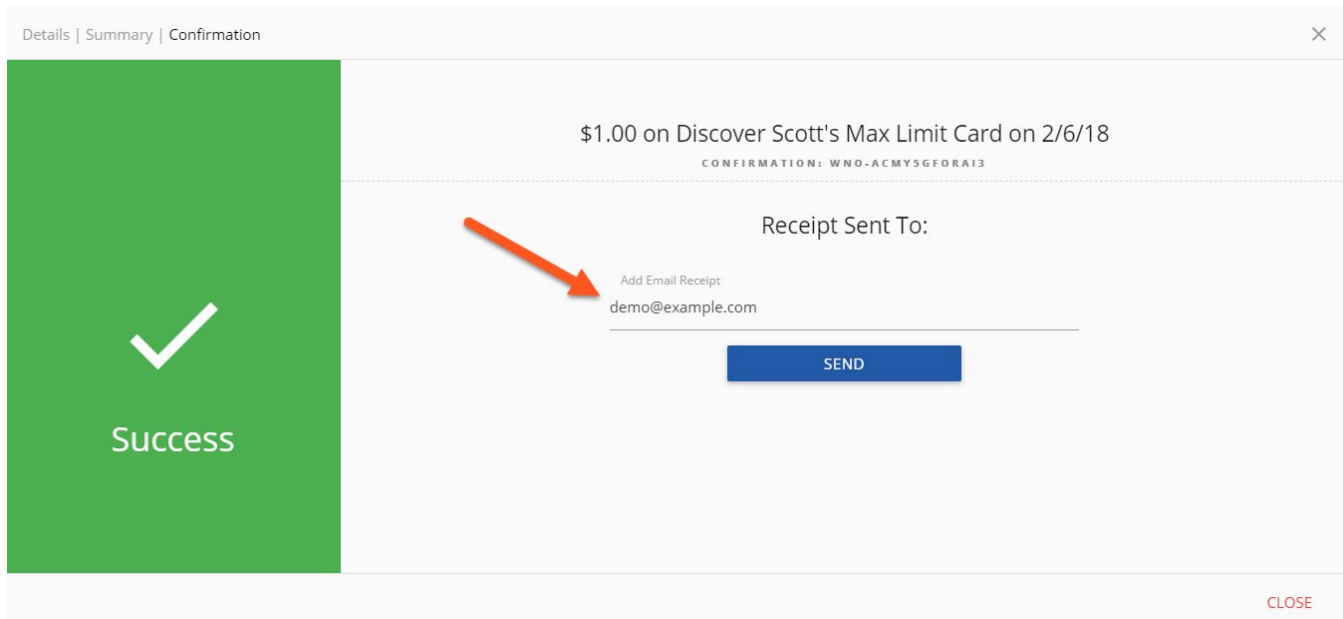
TODAY CLEAR CLOSE

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



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

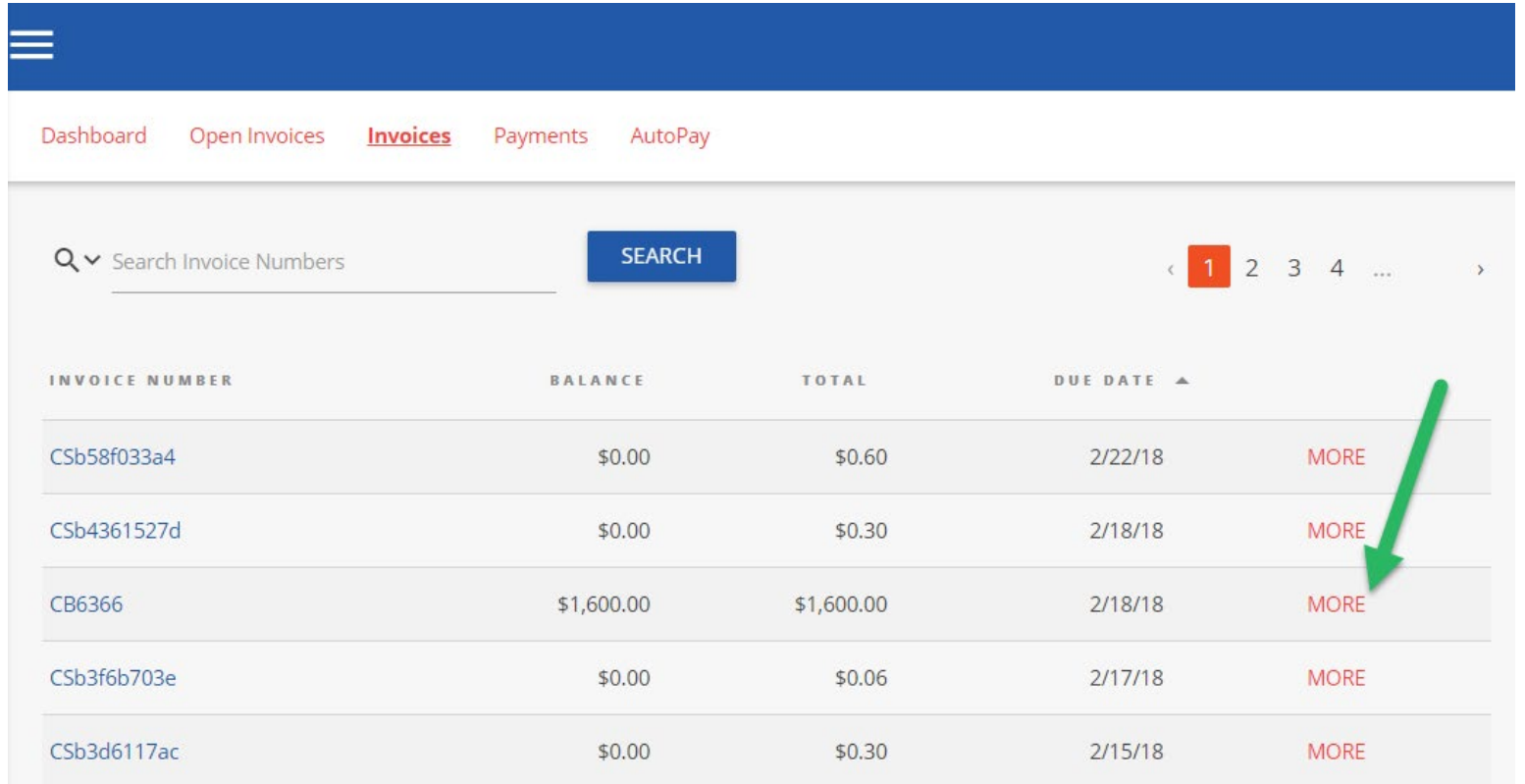
- An email receipt will be sent to your login email address.
 - You may send any additional receipts using the "Add Email Receipt" field.
- If the payment is scheduled for the future, the receipt will show the scheduled payment date.



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	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!

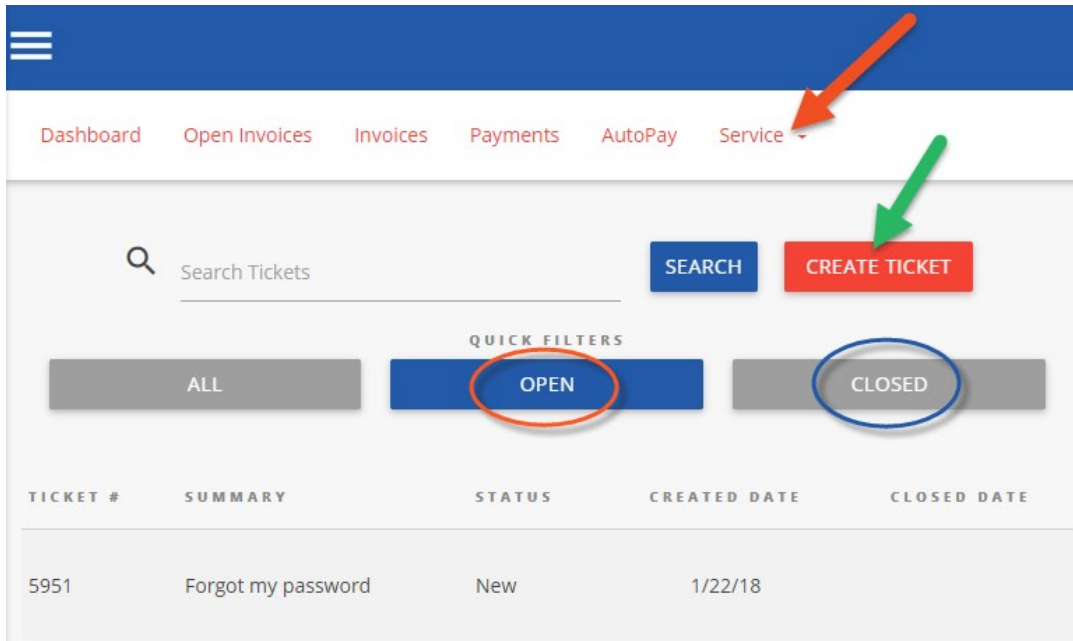
The screenshot shows the AutoPay configuration interface. At the top, there is a navigation bar with links for Dashboard, Open Invoices, Invoices, Payments, and AutoPay (highlighted with a blue circle). Below the navigation bar, there is a section titled "(DRAG TO REORDER)". The main configuration area 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 contains the following fields: "Payment Methods" with a dropdown menu set to "Wild Eagle Checking" (marked with a green '1'), "Run AutoPay" with a dropdown menu set to "On Due Date" (marked with a green '2'), "Autopay Type" with a dropdown menu set to "Contract" (marked with a green '3'), and a dropdown menu set to "Platinum Managed Plan (\$2,750.00)" (marked with a green '4'). Below these fields are buttons for "ADVANCED", "DELETE", and "UNDO CHANGES". The second section is titled "AutoPay when Invoice Amount Is less than 1000.00". 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 are three buttons: "NEW" (blue), "CANCEL" (red), and "SAVE" (blue, marked with a green '5'). 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 "Term" or "Amount". Monthly Recurring invoices "Term" should be 1st of Month.
- 4 - Pick the "Term" or "Amount" 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.

