



PORTAL INTRODUCTION

A Quick "How-To" Guide

Welcome to our new payment portal! We are excited to offer this new level of service for your business. Please follow the instructions below to help you navigate through the portal. As always, please do not hesitate to call us at 401-921-2607 with any questions. Let's begin!

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.

Dashboard Open Invoices Invoices Payments AutoPay Service ▾

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

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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”.

The screenshot displays the 'Open Invoices' page. At the top, there is a navigation bar with a hamburger menu icon and a breadcrumb trail: Dashboard > **Open Invoices** > Invoices > Payments > AutoPay > Service. Below the navigation is a search bar labeled 'Search Invoice Numbers' with a magnifying glass icon, a 'SEARCH' button, and a filter icon. Underneath the search bar are three 'QUICK ACTIONS' buttons: 'SELECT ALL' (red), 'DESELECT ALL' (red), and 'PAY SELECTED' (green). The main content is a table of invoices with the following columns: INVOICE NUMBER, BALANCE, TOTAL, DUE DATE, and MORE. The table contains four rows of data. The first row (CB6360) has a green arrow pointing to its checkbox and a red arrow pointing to its 'MORE' button. The second row (QBINV123486) has an unchecked checkbox. The third row (CB6363) is highlighted in blue and has a checked checkbox. The fourth row (CB6364) has an unchecked checkbox.

INVOICE NUMBER	BALANCE	TOTAL	DUE DATE	MORE
<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

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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 table with columns for Amount and Transaction Date. A green arrow points to the 'VIEW' button at the bottom of the window.

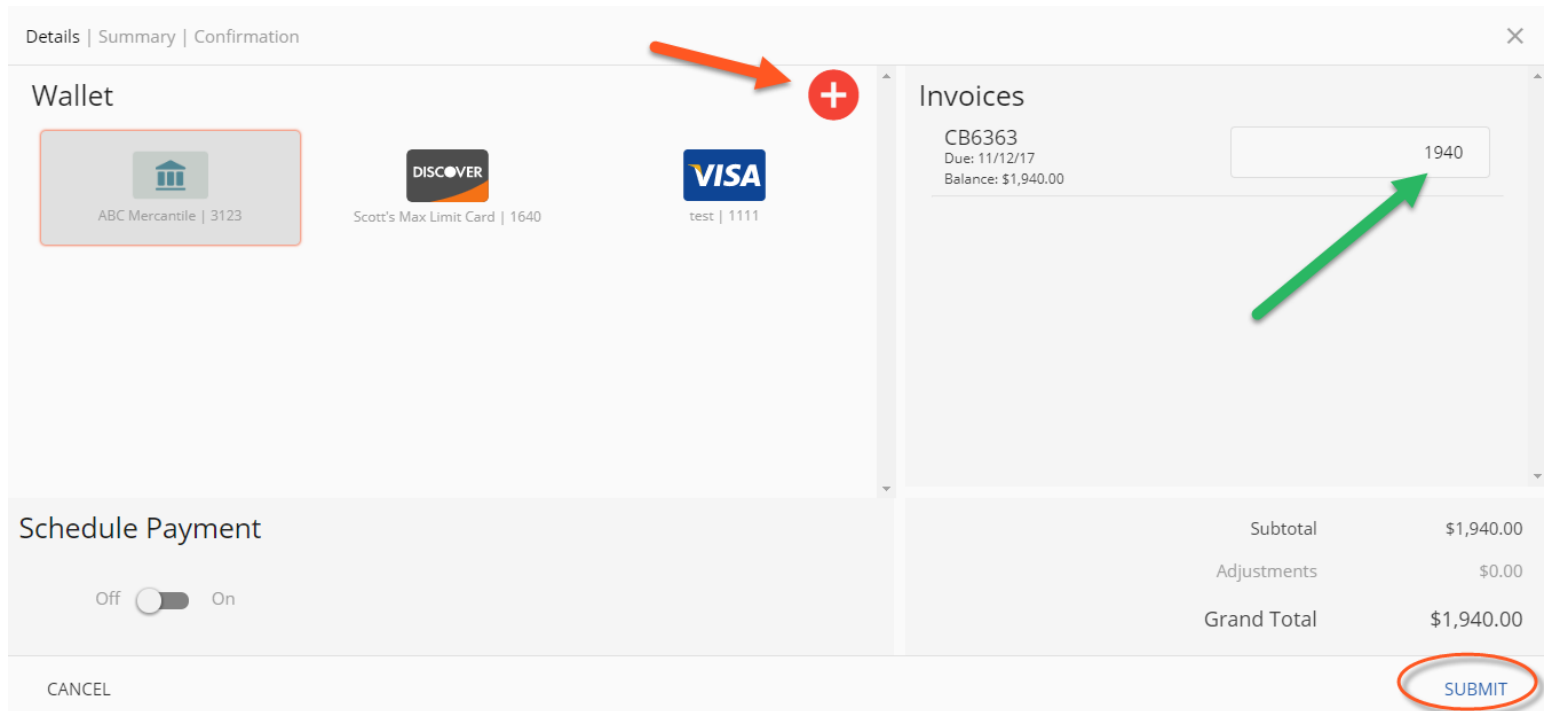
AMOUNT	TRANSACTION DATE	
\$30.00	2/15/18	📅
\$10.00	12/8/17	✅
\$25.00	12/13/17	✅
\$25.00	1/3/18	✅
\$17.00	1/3/18	✅

At the bottom of the window, there are three buttons: **PAY** (circled in red), **VIEW** (with a red eye icon), and **CLOSE**.

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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

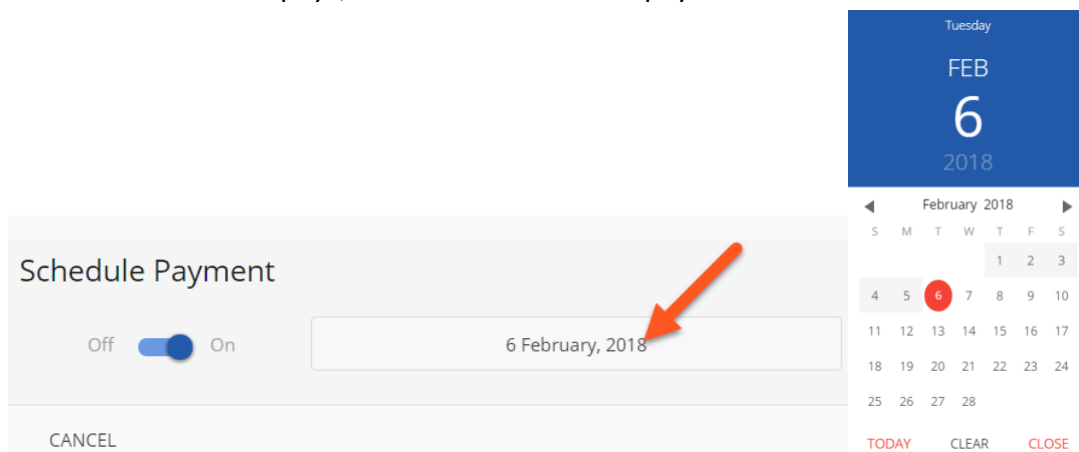
CANCEL

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

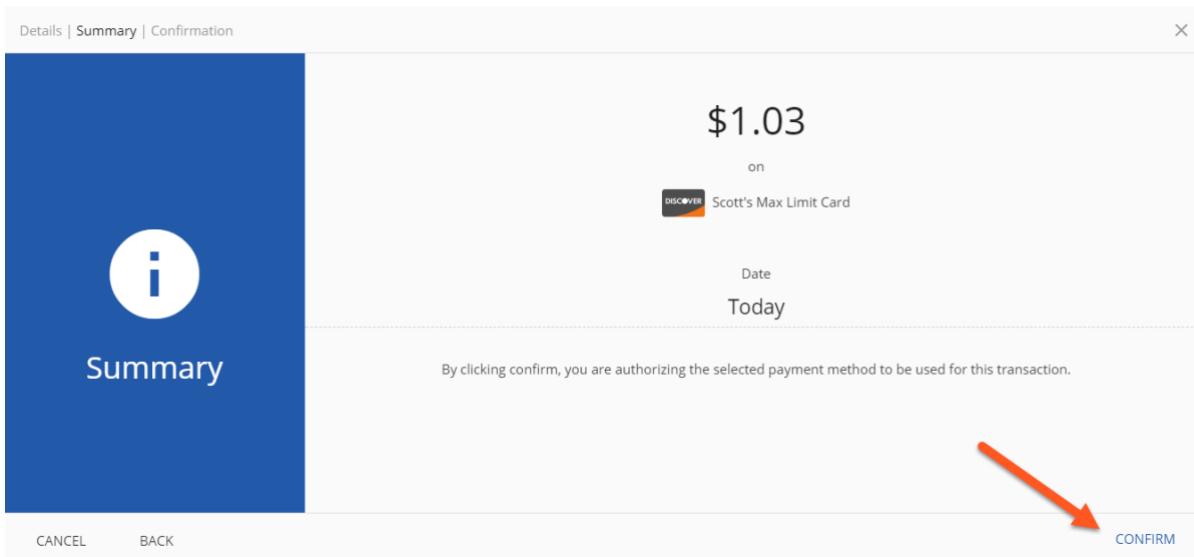
18 19 20 21 22 23 24

25 26 27 28

TODAY CLEAR CLOSE

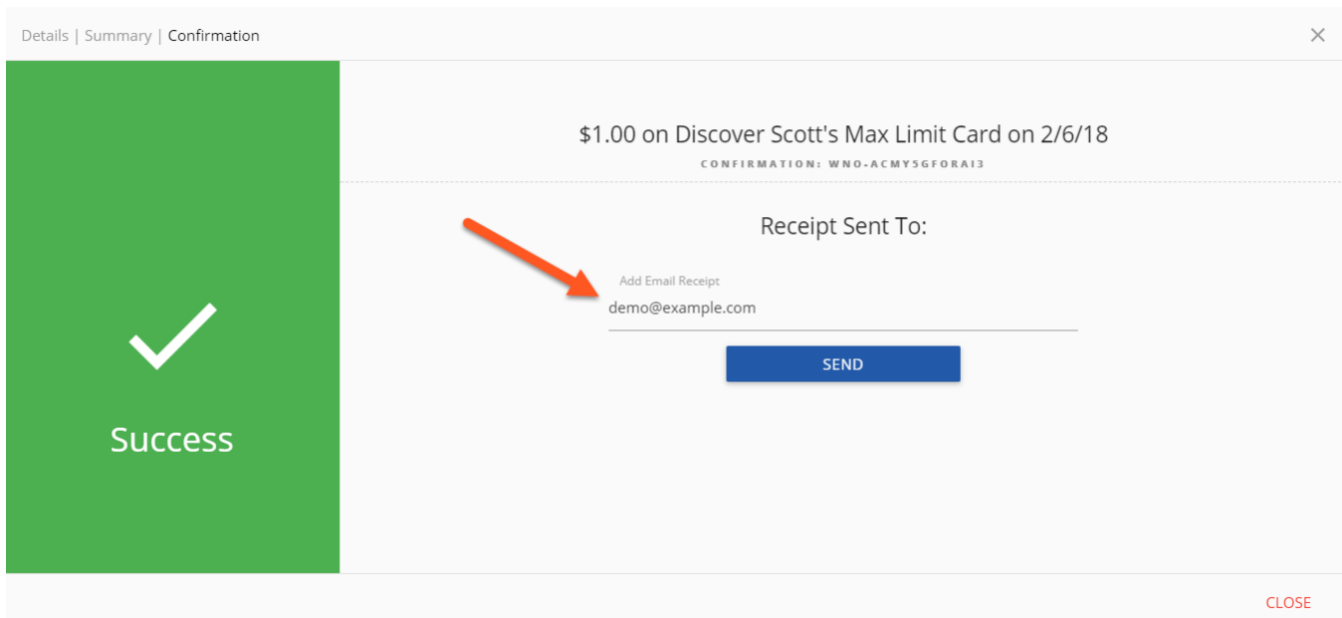
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Clicking **“SUBMIT”** will give you a chance to review your actions.



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.

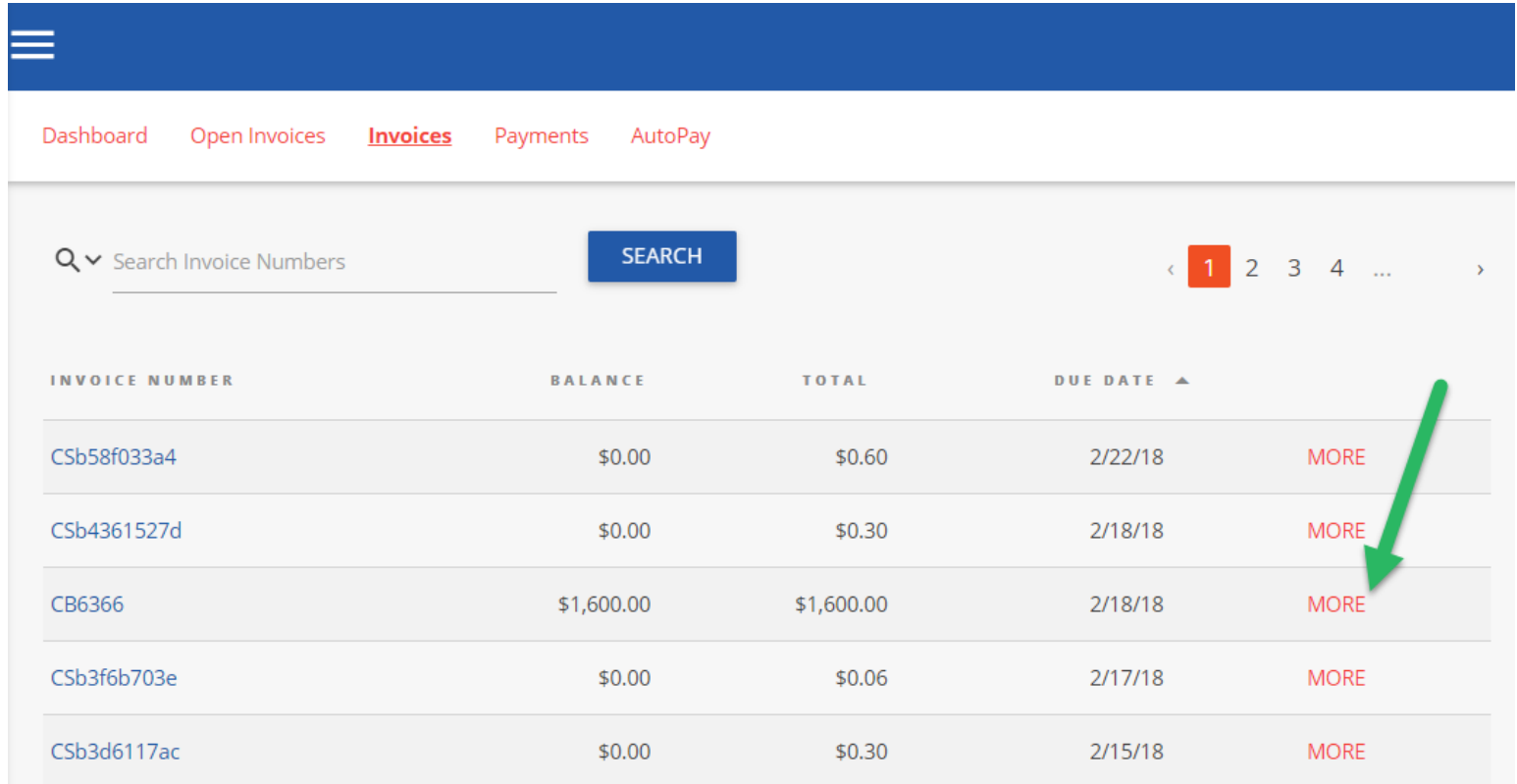


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Invoice History:

Click on the "Invoices" menu option:

- Click "MORE" on previously issued and archaic invoices
 - 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


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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	

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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!

The screenshot shows the AutoPay configuration interface. At the top, there is a navigation bar with 'Dashboard', 'Open Invoices', 'Invoices', 'Payments', and 'AutoPay' (circled in blue). Below the navigation bar, there is a section titled '(DRAG TO REORDER)'. The first rule is 'AutoPay when Invoice Contract Is any of the following Platinum Managed Plan (\$2,750.00)'. It has a lock icon and an edit icon. The rule is configured with the following settings:

- 1. Payment Methods: Wild Eagle Checking
- 2. Run AutoPay: On Due Date
- 3. Autopay Type: Contract
- 4. Contract: Matches Any
- 5. Platinum Managed Plan (\$2,750.00)

At the bottom of the rule configuration, there are buttons for 'ADVANCED', 'DELETE', and 'UNDO CHANGES'. Below the first rule, there is a second rule: 'AutoPay when Invoice Amount Is less than 1000.00'. At the bottom of the interface, 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 box with the number '5' is next to the 'SAVE' button. An orange arrow points to the 'NEW' button.

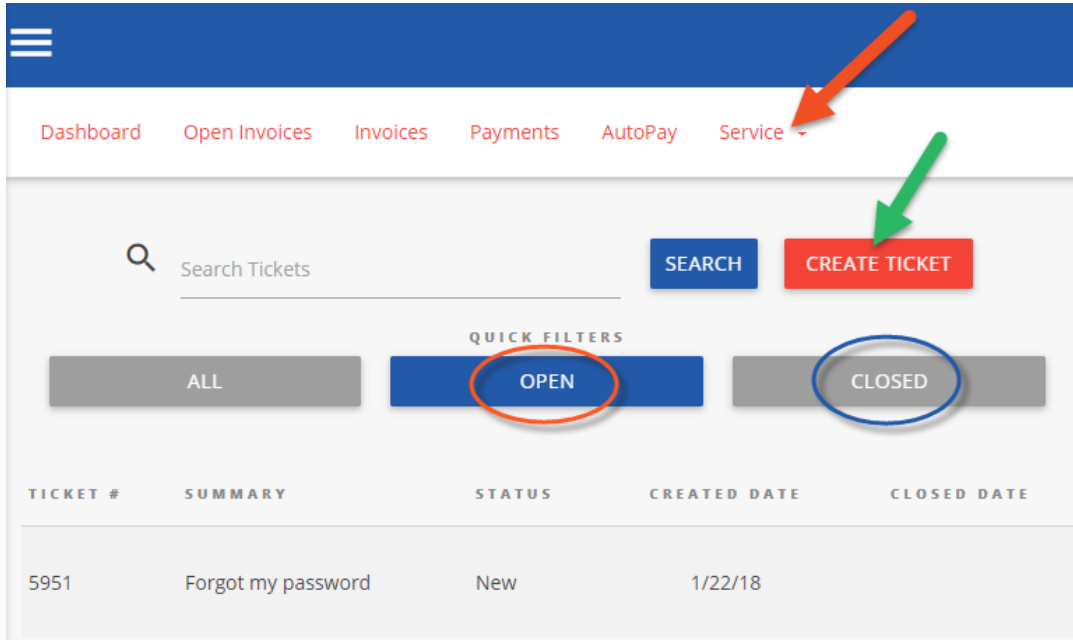
- 1 - Select the payment method you want this rule to follow
- 2 - “On Due Date” will pay invoices matching the criteria on the date they are due (not created)
- 3 - Select “Contract” or “Amount”
- 4 - Pick the recurring service agreement you would like to be auto-paid
- 5 - Save your changes!

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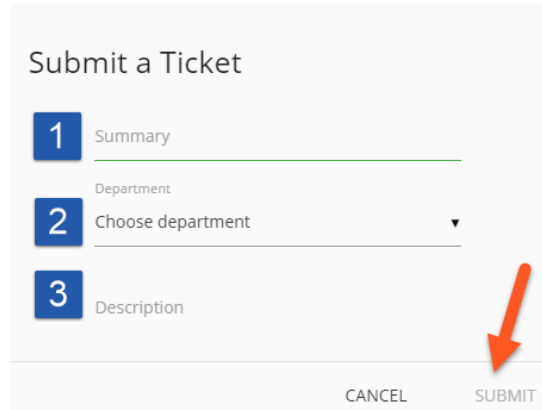
Service:

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 top navigation bar with a blue background and a white hamburger menu icon on the left. The navigation items are: Dashboard, Open Invoices, Invoices, Payments, AutoPay, and Service. A red arrow points to the Service menu item. Below the navigation bar is a search area with a magnifying glass icon, the text "Search Tickets", a blue "SEARCH" button, and a red "CREATE TICKET" button. A green arrow points to the "CREATE TICKET" button. Below the search area are "QUICK FILTERS" with three buttons: "ALL", "OPEN", and "CLOSED". The "OPEN" button is circled in orange, and the "CLOSED" button is 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.



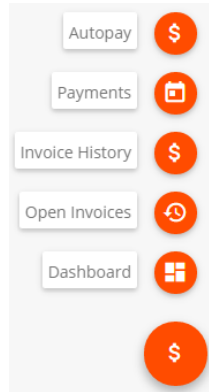
The screenshot shows the "Submit a Ticket" form. It has three numbered steps: 1. Summary (with a text input field), 2. Choose department (with a dropdown menu), and 3. Description (with a text input field). At the bottom of the form are two buttons: "CANCEL" and "SUBMIT". A red arrow points to the "SUBMIT"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

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Mobile:

Mobile device navigation:

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



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