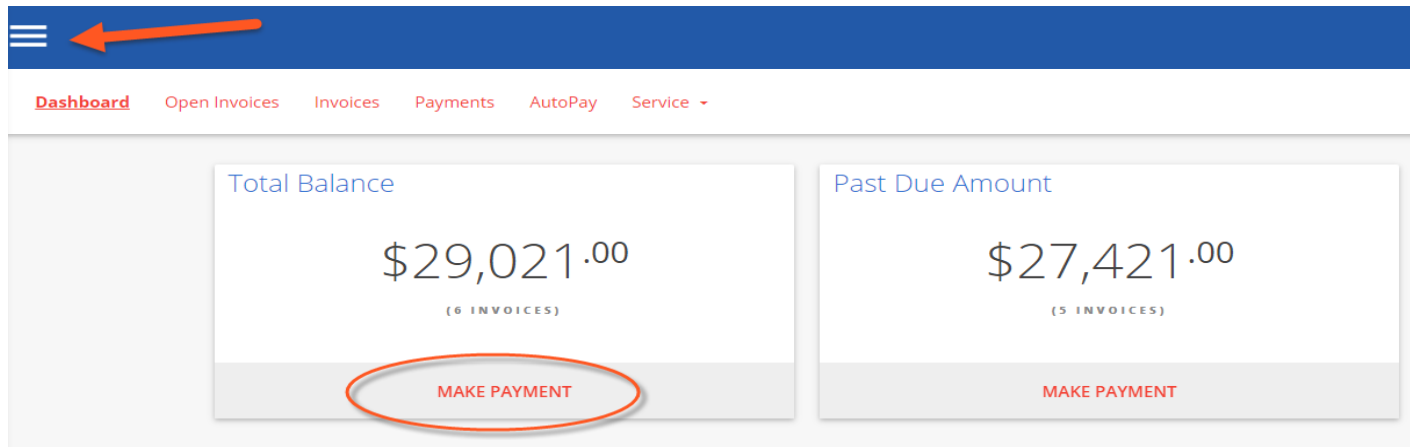


## VIEW AND PAY INVOICES:

### Dashboard

This is the first thing you will see when logging in, known as the “Dashboard” 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.

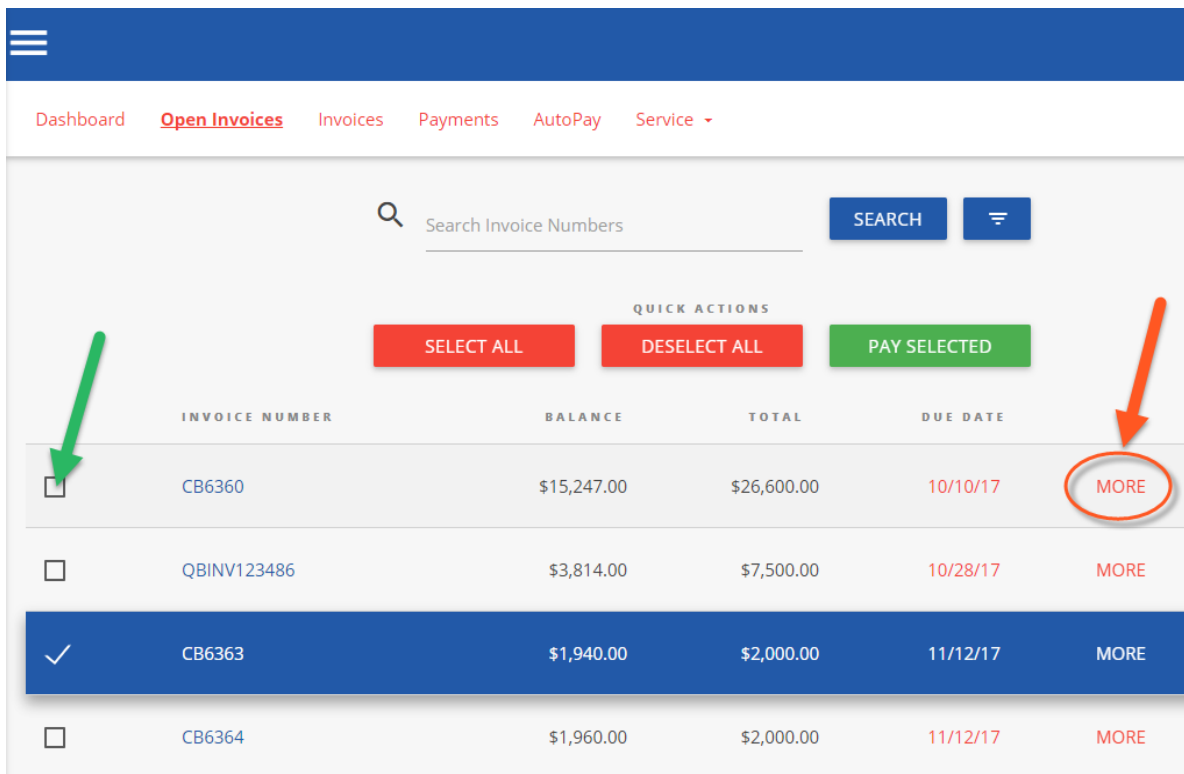


The screenshot shows the dashboard interface. At the top, there is a blue navigation bar with a hamburger menu icon on the left and a navigation menu with items: Dashboard, Open Invoices, Invoices, Payments, AutoPay, and Service. Below the navigation bar, there are two main tiles. The left tile is titled "Total Balance" and displays "\$29,021.00" with "(6 INVOICES)" below it. A red circle highlights the "MAKE PAYMENT" button at the bottom of this tile. The right tile is titled "Past Due Amount" and displays "\$27,421.00" with "(5 INVOICES)" below it. A "MAKE PAYMENT" button is also visible at the bottom of this tile. An orange arrow points to the hamburger menu icon in the top left corner.

### Open Invoices

Click the “OPEN INVOICES” menu option:

- All currently open invoices in our system are listed here.
- Select the items you wish to pay, and click “Pay Selected”.
- Clicking “MORE” on any invoice will display a details window:



The screenshot shows the "Open Invoices" page. At the top, there is a blue navigation bar with a hamburger menu icon on the left and a navigation menu with items: Dashboard, Open Invoices, Invoices, Payments, AutoPay, and Service. Below the navigation bar, there is a search bar with the text "Search Invoice Numbers" and a "SEARCH" button. To the right of the search bar is a filter icon. Below the search bar, there are three buttons: "SELECT ALL" (red), "DESELECT ALL" (red), and "PAY SELECTED" (green). Below these buttons is a table with the following columns: INVOICE NUMBER, BALANCE, TOTAL, DUE DATE, and MORE. The table contains four rows of invoice data. A green arrow points to the checkbox in the first row, and a red arrow points to the "MORE" button in the first row.

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

Click "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

**CB6363**

**DUE DATE** 11/12/17    **TOTAL** \$2,000.00    **BALANCE** \$1,940.00

**TRAN. DATE** 9/13/17    **PO#** --

Past D...    Sched... 1

**SUMMARY**    **COMMENT**

INVOICE NUMBER	AMOUNT	TRANSACTION DATE	
CB6360	\$30.00	2/15/18	📅
QBINV123486	\$10.00	12/8/17	✓
CB6363	\$25.00	12/13/17	✓
CB6364	\$25.00	1/3/18	✓
CB6362	\$17.00	1/3/18	✓

**PAY**    **VIEW**    **CLOSE**

### To Process a Payment:

- Select the checkbox of one (or multiple) invoice(s). Click "PAY SELECTED" **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    Scott's Max Limit Card | 1640    VISA test | 1111

**Invoices**

CB6363  
Due: 11/12/17  
Balance: \$1,940.00

1940

**Schedule Payment**

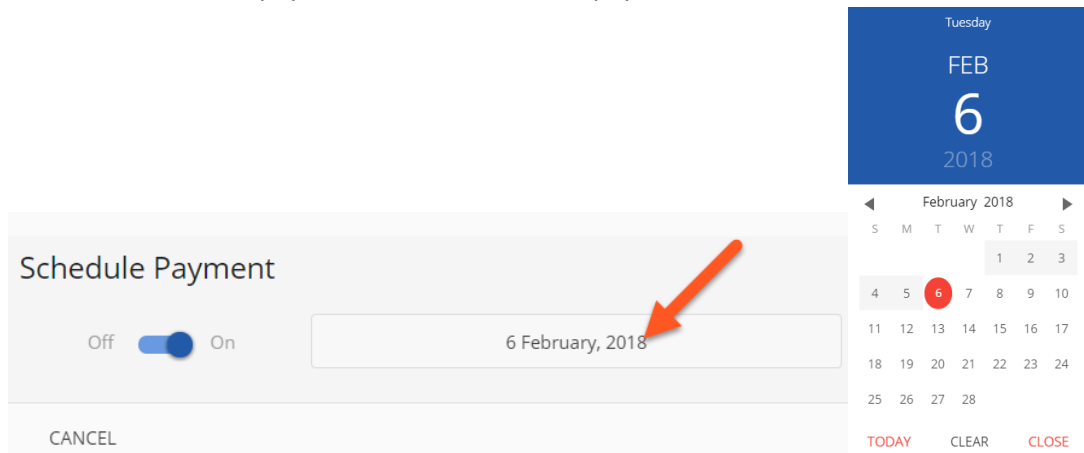
Off  On

**Subtotal** \$1,940.00  
**Adjustments** \$0.00  
**Grand Total** \$1,940.00

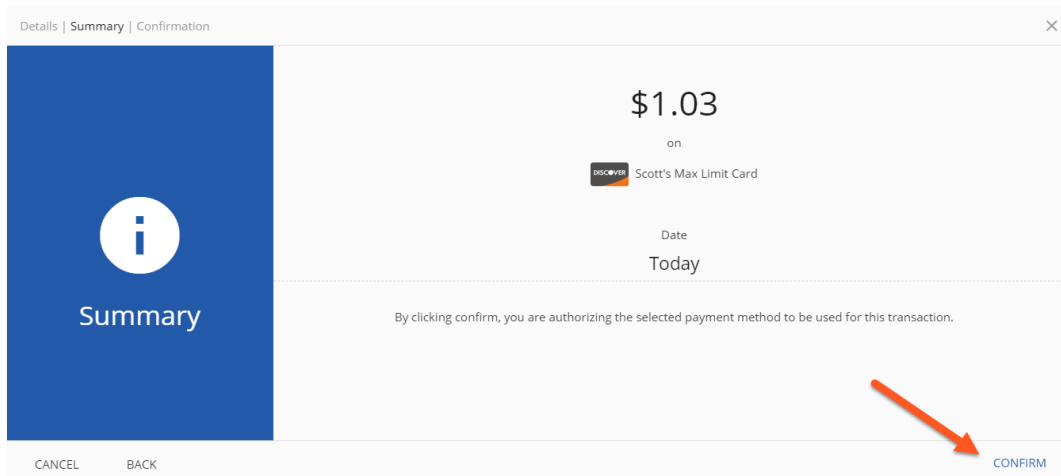
**CANCEL**    **SUBMIT**

### 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.



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.

