

PORTAL INTRODUCTION

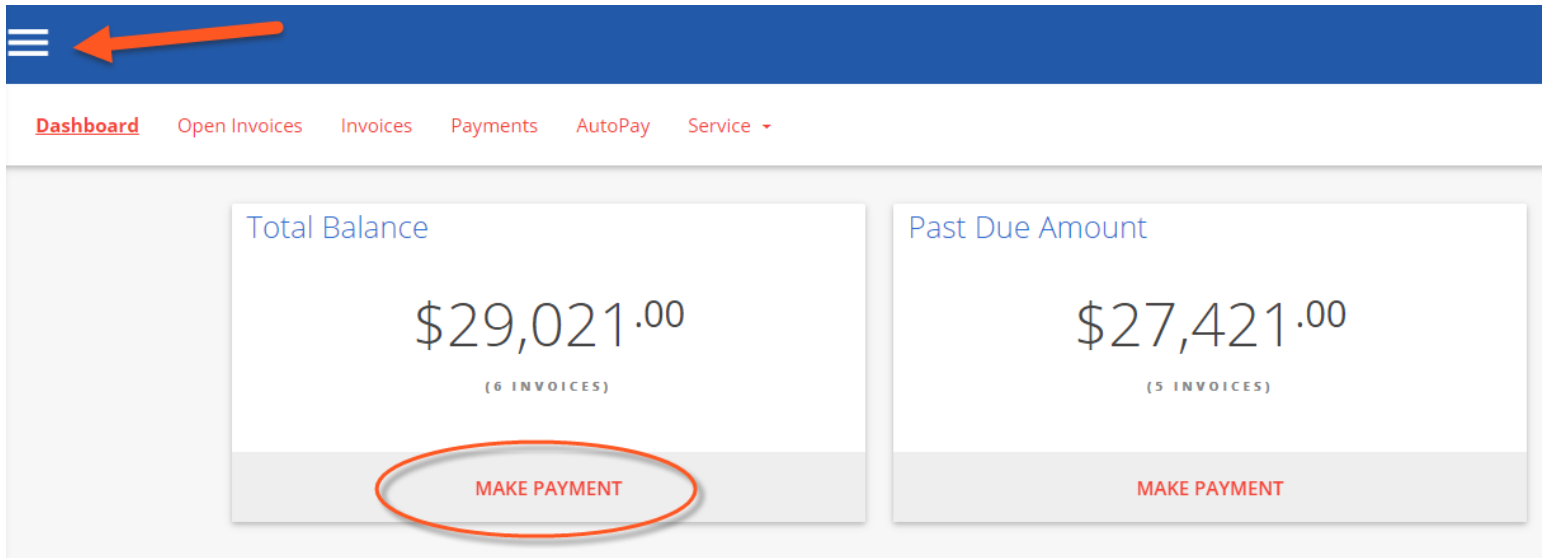
A Quick “How-To” Guide

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.



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

Q

Search Invoice Numbers

SEARCH

QUICK ACTIONS

SELECT ALL

DESELECT ALL

PAY SELECTED

	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

Open Invoices Invo

CB6363

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

TRAN. DATE 9/13/17 **PO#** --

Past D... Sched...

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

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

Tuesday

FEB

6

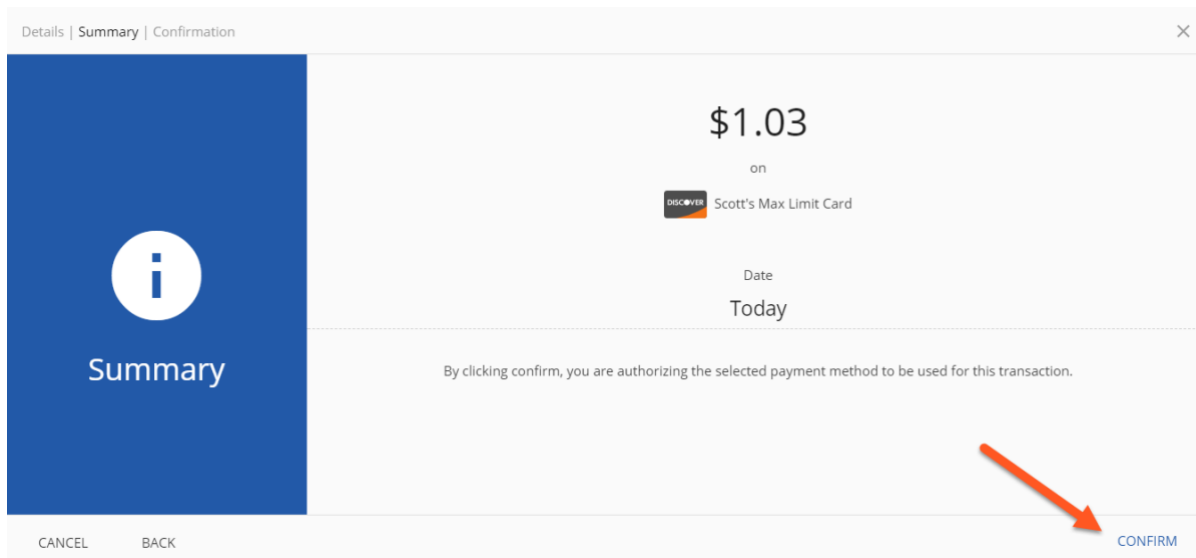
2018

February 2018

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.




This is a payment confirmation summary screen. On the left, a blue sidebar contains an information icon and the word "Summary". The main area displays a transaction of \$1.03 on a Discover Scott's Max Limit Card, dated "Today". A disclaimer states: "By clicking confirm, you are authorizing the selected payment method to be used for this transaction." At the bottom, there are "CANCEL", "BACK", and "CONFIRM" buttons. An orange arrow points to the "CONFIRM" button.

Details | Summary | Confirmation

\$1.03

on

 Scott's Max Limit Card

Date

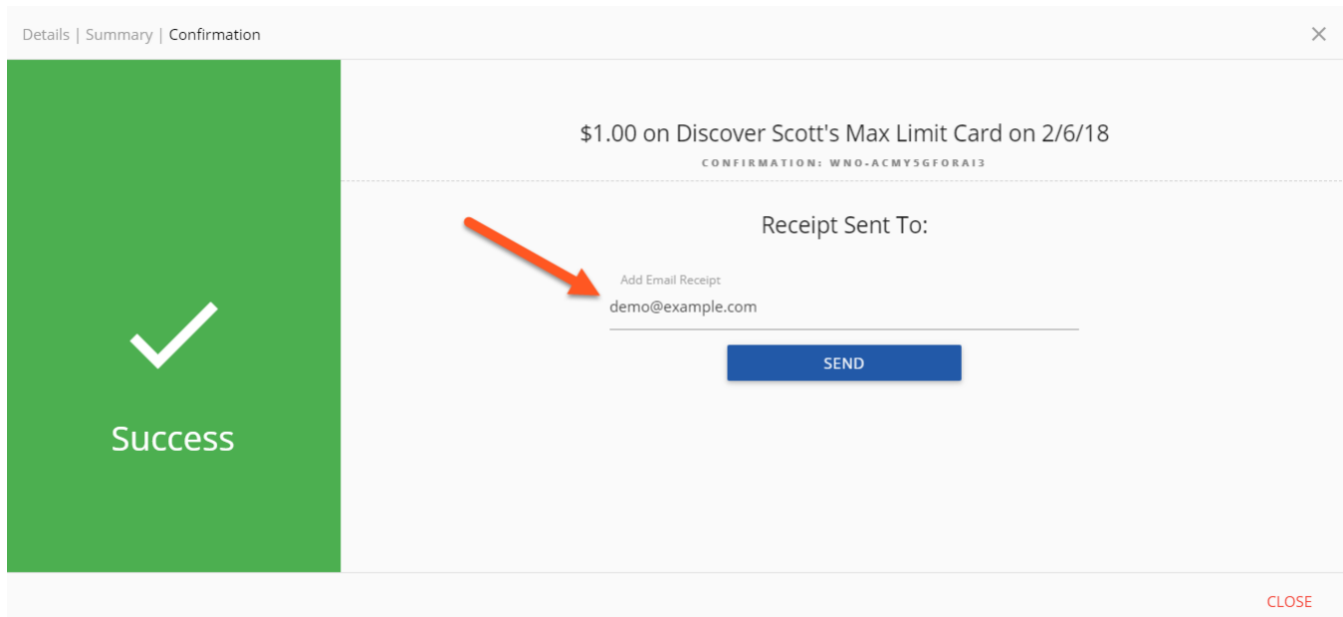
Today

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

CANCEL 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.



This is a payment success screen. On the left, a green sidebar contains a checkmark icon and the word "Success". The main area displays the transaction: "\$1.00 on Discover Scott's Max Limit Card on 2/6/18" with a confirmation code "WNO-ACM5SGFORA13". Below this, it says "Receipt Sent To:" followed by an "Add Email Receipt" link and the email "demo@example.com". A "SEND" button is located below the email field. An orange arrow points to the "Add Email Receipt" link. A "CLOSE" button is in the bottom right corner.

Details | Summary | Confirmation

\$1.00 on Discover Scott's Max Limit Card on 2/6/18

CONFIRMATION: WNO-ACM5SGFORA13

Receipt Sent To:

Add Email Receipt

demo@example.com

SEND

Success

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

DashboardOpen InvoicesInvoicesPaymentsAutoPay

Q

Search Invoice Numbers

SEARCH

<

1

2

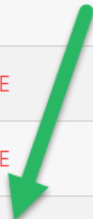
3

4

...

>

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

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: 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 two rows of configuration options. The first row has 'Payment Methods' with a dropdown menu showing 'Wild Eagle Checking' (labeled 1) and 'Run AutoPay' with a dropdown menu showing 'On Due Date' (labeled 2). The second row has 'Autopay Type' with a dropdown menu showing 'Contract' (labeled 3) and 'Matches Any' with a dropdown menu showing 'Platinum Managed Plan (\$2,750.00)' (labeled 4). Below the configuration area, there are three buttons: '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 disclaimer: '*By saving, you are authorizing all of the above payments according to their criterion.' At the bottom, there are three buttons: 'NEW' (labeled 5), 'CANCEL', and 'SAVE'. An orange arrow points to the 'NEW' button.

Dashboard Open Invoices Invoices Payments **AutoPay**

(DRAG TO REORDER)

AutoPay when Invoice Contract Is any of the following Platinum Managed Plan (\$2,750.00)

Payment Methods Run AutoPay

1 Wild Eagle Checking 2 On Due Date

Autopay Type Contract

3 Contract 4 Contract

Matches Any Platinum Managed Plan (\$2,750.00)

ADVANCED DELETE UNDO CHANGES

AutoPay when Invoice Amount Is less than 1000.00

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

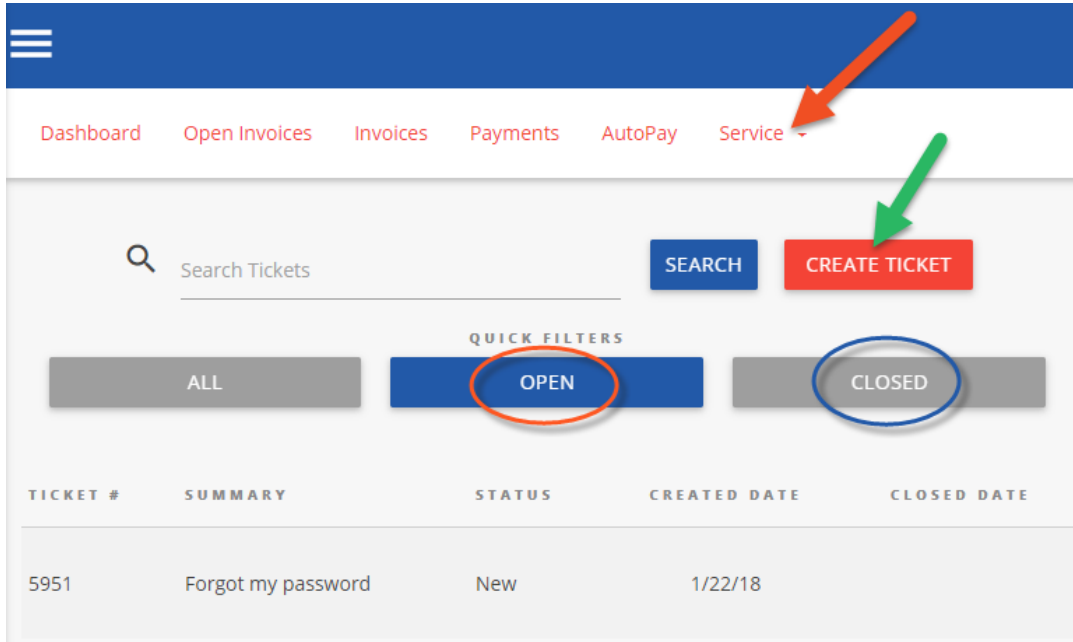
NEW CANCEL SAVE 5

- 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 "Submit a Ticket" form. It has three numbered steps: 1. Summary, 2. Department, and 3. Description. Step 1 is a text input field. Step 2 is a dropdown menu labeled "Choose department". Step 3 is a text input field. At the bottom of the form are two buttons: "CANCEL" and "SUBMIT". 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.

