

# PORTAL INTRODUCTION

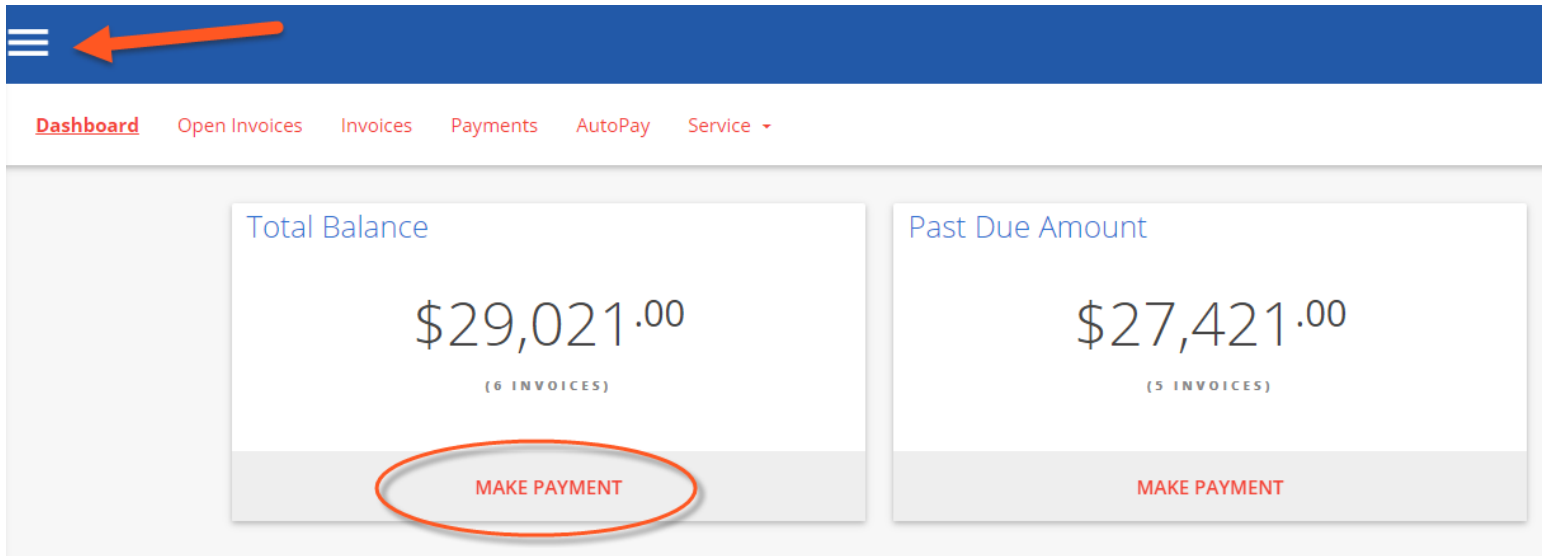
## A Quick "How-To" Guide

### 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. Below the navigation bar, there are 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, which is circled in orange in the left tile.

## 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	<a href="#">MORE</a>
<input type="checkbox"/>	QBINV123486	\$3,814.00	\$7,500.00	10/28/17	<a href="#">MORE</a>
<input checked="" type="checkbox"/>	CB6363	\$1,940.00	\$2,000.00	11/12/17	<a href="#">MORE</a>
<input type="checkbox"/>	CB6364	\$1,960.00	\$2,000.00	11/12/17	<a href="#">MORE</a>

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

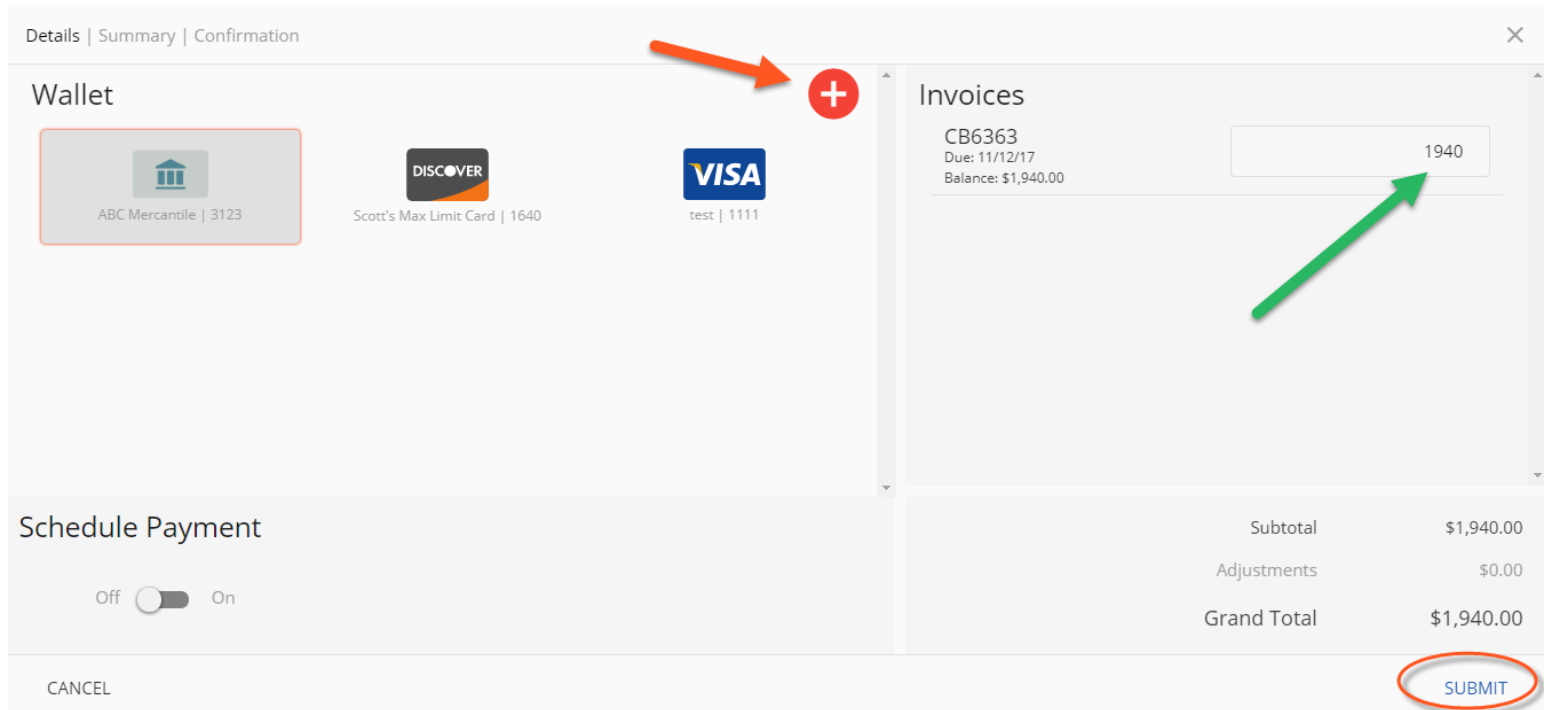
The screenshot shows a details window for invoice CB6363. The window has a blue header with the invoice number and key information. Below the header is a summary table with columns for Invoice Number, Amount, and Transaction Date. A green arrow points to the 'VIEW' button at the bottom of the window.

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

At the bottom of the window, there are three buttons: "PAY" (circled in red), "VIEW", 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

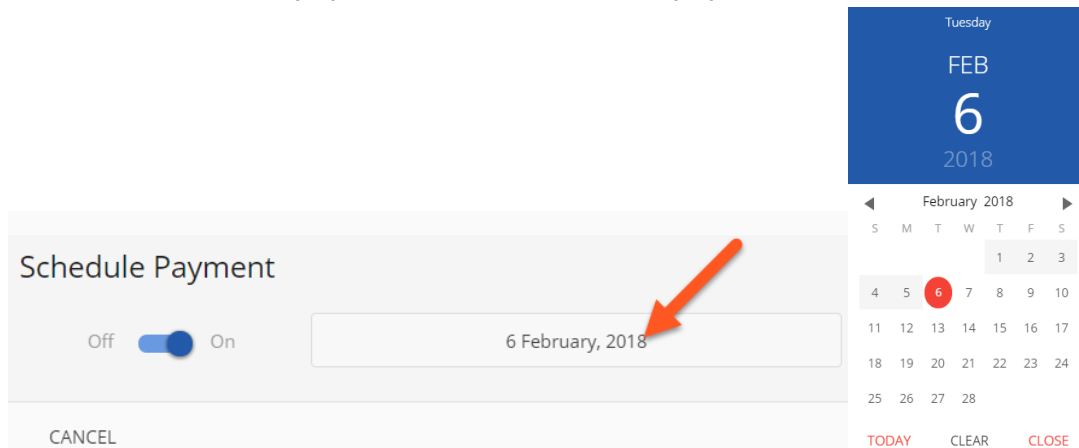
CANCEL

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

1 2 3

4 5 6 7 8 9 10

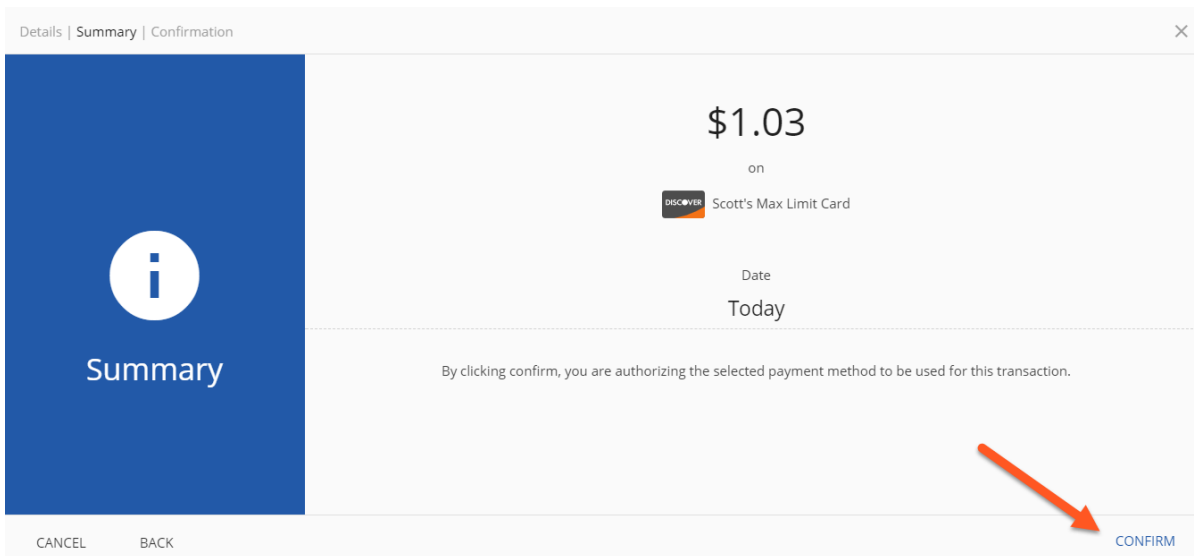
11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28

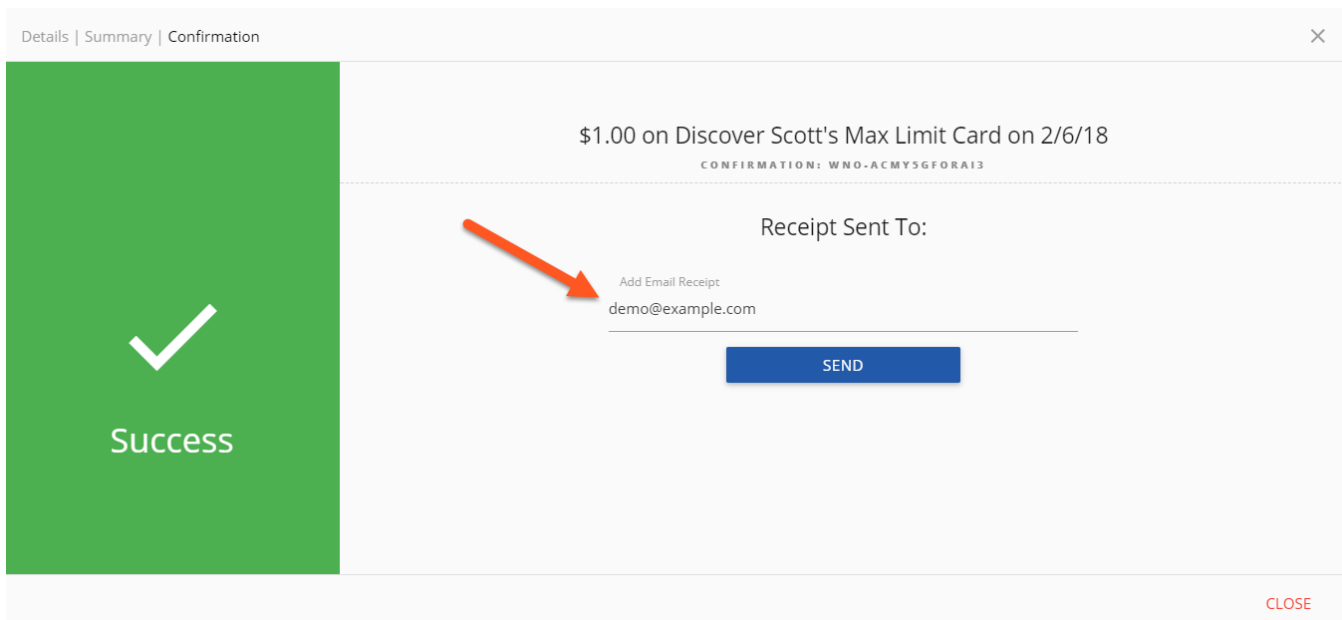
TODAY CLEAR CLOSE

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



Clicking “CONFIRM” will yield a payment success or failure screen

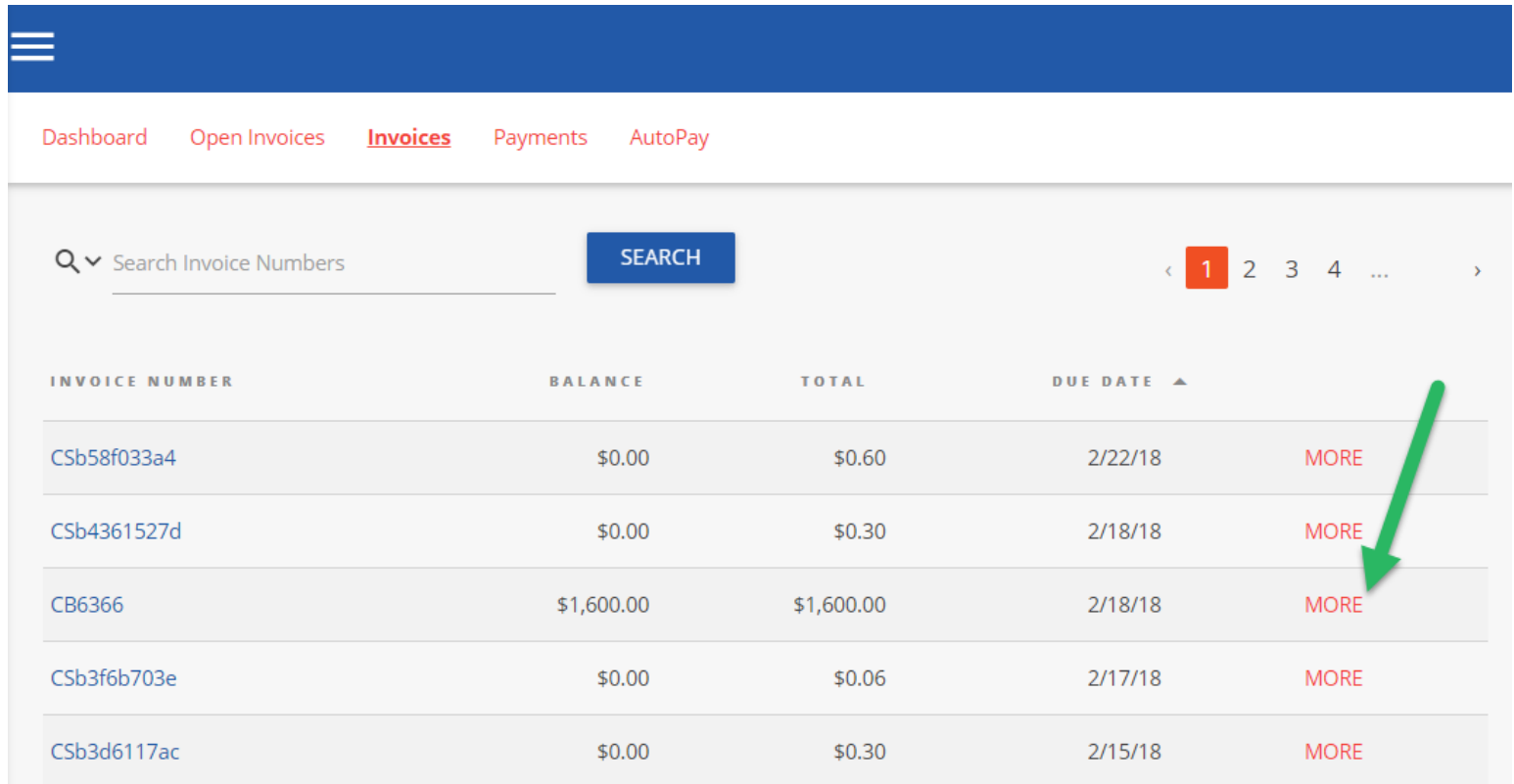
- An email receipt will be sent to your login email address.
  - You may send any additional receipts using the “Add Email Receipt” field.
- If the payment is scheduled for the future, the receipt will show the scheduled payment date.



## 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



The screenshot shows the RESTECH Invoices page. At the top, there is a blue navigation bar with a hamburger menu icon on the left and the following menu items: Dashboard, Open Invoices, **Invoices**, Payments, and AutoPay. Below the navigation bar is a search section with a search icon, a text input field labeled "Search Invoice Numbers", a blue "SEARCH" button, and pagination controls showing page 1 of 4. The main content is a table with the following columns: INVOICE NUMBER, BALANCE, TOTAL, DUE DATE, and MORE. A green arrow points to the "MORE" link for the invoice with ID CB6366.


INVOICE NUMBER	BALANCE	TOTAL	DUE DATE ▲	MORE
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 for configuring AutoPay rules. The first rule is titled "AutoPay when Invoice Contract Is any of the following Platinum Managed Plan (\$2,750.00)". It has a lock icon and a pencil icon. The rule is configured with the following settings:

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

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 titled "AutoPay when Invoice Amount Is less than 1000.00". At the bottom of the interface, there is a confirmation dialog with the text: "\*By saving, you are authorizing all of the above payments according to their criterion." Below the dialog, there 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 “Contract” or “Amount”
- 4 - Pick the recurring service agreement you would like to be auto-paid
- 5 - Save your changes!



## Mobile

Mobile device navigation:

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

