

Introduction to TheConnection Personal Invoice Portal

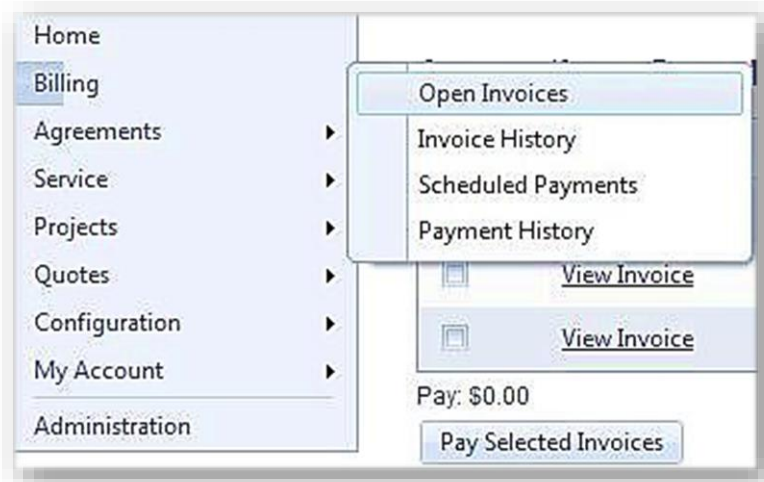
From the Payment portal you can select the invoice that you wish to view in either of these two ways.

Viewing your Open Invoices

- 1) Click on the 'Pay Bills' icon located top center of the page



- 2) Mouse over 'Billing' on the left column and click on 'Open Invoices'



This will load the 'Open Invoices' page showing you all of the currently open invoices. This is an example of what your open invoice page may look like.

Accounting - Open Invoices

<input type="checkbox"/>	Due Date ▾	Invoice #	PO #	Total	Balance	Pending Payment	Scheduled Payment	AutoPay Payment	
<input type="checkbox"/>	View Invoice 09/07/2013	594		\$5,889.00	\$3,389.00				Comment On Invoice
<input type="checkbox"/>	View Invoice 09/07/2013	596		\$5,450.00	\$5,450.00				Comment On Invoice
<input type="checkbox"/>	View Invoice 09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice

Pay: \$0.00

You may choose an invoice to view by selecting the check box to the left of the invoice that you wish to view.

Accounting - Open Invoices

<input type="checkbox"/>	View Invoice	Due Date	Invoice #	PO #	Total	Balance	Pending Payment	Scheduled Payment	AutoPay Payment	Comment On Invoice
<input checked="" type="checkbox"/>	View Invoice	09/07/2013	594		\$5,889.00	\$3,389.00				Comment On Invoice
<input type="checkbox"/>	View Invoice	09/07/2013	596		\$5,450.00	\$5,450.00				Comment On Invoice
<input type="checkbox"/>	View Invoice	09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice

Pay: \$3,389.00

By clicking on the 'Pay Selected Invoice' button you will be brought to the page that allows you to choose your payment type for this specific invoice.

Accounting - Invoice Payment

Due Date	Pending Payment	Scheduled Payment	Invoice #	PO #	Total	Balance	Payment Amount
09/07/2013			594		\$5,889.00	\$3,389.00	<input type="text" value="\$3389.00"/>

Paying 1 invoices. Total amount on invoices to pay: \$3389.00

Select payment method:

- Test ACH
- ACH - *****3456
- Test CC
- CC - *****1111
- Add new Payment Method

Pay Now Pay Future

We have chosen ACH (checking account) in this example. You may have the same option if allowed.

Accounting - Invoice Payment

Due Date	Pending Payment	Scheduled Payment	Invoice #	PO #	Total	Balance	Payment Amount
09/07/2013			594		\$5,889.00	\$3,389.00	<input type="text" value="\$3389.00"/>


Paying 1 invoices. Total amount on invoices to pay: \$3389.00

Select payment method:

Pay Now Pay Future

You may also choose credit card if that option is allowed.

Accounting - Invoice Payment

Due Date	Pending Payment	Scheduled Payment	Invoice #	PO #	Total	Balance	Payment Amount
09/07/2013			594		\$5,889.00	\$3,389.00	<input type="text" value="\$3389.00"/>

Paying 1 invoices. Total amount on invoices to pay: \$3389.00

Select payment method:

Pay Now Pay Future

Once you have selected the payment type that you wish to have this invoice applied to then click the 'Pay Now' button. You will then get a confirmation that looks similar to this.


Payment Receipt

Paid Date: 9/20/2013 9:39:28 AM
Applied Amount: \$3,389.00
Surcharge Amount: \$0.00
Total Amount: \$3,389.00
Invoices Paid: 594
Payment Type: Visa

Thank you. Your payment has been received.

Another option available to you in paying invoices is to schedule a payment & type for the future. Instead of choosing the 'Pay Now' option you can select the 'Pay Future' option and then select the date that you wish the payment to be made.


Accounting - Invoice Payment

Due Date	Pending Payment	Scheduled Payment
09/07/2013		

Paying 1 invoices. Total amount on invoices to pay: \$0.00

Select payment method:

Pay Now Pay Future

Scheduled Date: 

Schedule Paymer

	S	M	T	W	T	F	S
40	29	30	1	2	3	4	5
41	6	7	8	9	10	11	12
42	13	14	15	16	17	18	19
43	20	21	22	23	24	25	26
44	27	28	29	30	31	1	2
45	3	4	5	6	7	8	9

After your date has been selected it will appear in the 'Scheduled Date' box.

Due Date	Pending Payment	Scheduled Payment
09/07/2013		

Paying 1 invoices. Total amount on invoices to pay: \$0.00

Select payment method:

Pay Now Pay Future

Scheduled Date:

The next step is to confirm your selection by clicking the 'Scheduled Payment' button. At this point you will see the following information.

Payment Receipt

Scheduled Payment Date: 10/28/2013
Applied Amount: \$0.00
Surcharge Amount: \$0.00
Total Amount: \$0.00
Invoices Paid: 594
Payment Type: ACH

Thank you. Your payment has been scheduled.

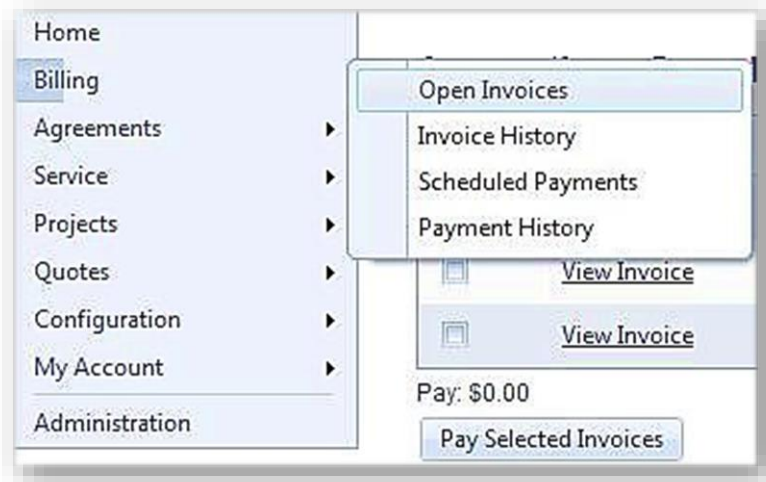
Congratulations! You have made/scheduled a payment on an open invoice from your personal invoice portal. Let's look at a couple of other features while you're here...

Viewing an open invoice.

1) Click on the 'Pay Bills' icon located top center of the page



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Accounting - Open Invoices

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<input type="checkbox"/> View Invoice	09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice

Pay: \$0.00

Click on 'View Invoice' link of the invoice that you wish to see.

This will load a snapshot of that invoice in your browser and may look similar to this.

Bill To:		Date	Invoice
Demo Company Attn: Demo Owner P.O. BOx 527 Detroit, MI 92344-0527		08/28/2013	594
		Account	
		Demo Company	
Terms	Due Date	PO Number	Reference
Net 10 days	09/07/2013		
Billing Method		Actual Rates	
Detail		Wed 8/28/2013/12:35 PM CDT/ Training User15-	
Resolution			
Company Name	Demo Company		
Contact Name	Demo Owner		
Ship To Address	711 N. Franklin St. 813-178-2000 Detroit, MI 92344		
Other Charges	Quantity	Price	Amount
Billable Other Charges			
Network Certified Workstation Intel 1.8 GHZ Pentium 4 Processor with 512k cache High Speed Motherboard 400/533mhz bus 32 Bit PCI Bus Mastering Architecture Intel ChipSet Shared AGP Videot / 4 USB 2.0 Ports 1 Mouse / 1 Parallel / 2 Serial Ports 10/100 Ethernet LAN Adapter Audio/Sound Adapter 1200 Megabytes of High Speed DDR SDRAM Memory 300 Watt Power Supply 40 Gigabyte Hard Drive Ultra Enhanced IDE Interface 9.5 Millisecond Access Time CD-ROM Player Internal 52x Speed Enhanced IDE Interface 1.44 Megabyte Floppy Drive 3.5" 104 Key Windows Enhanced Keyboard Optical Three Button Mouse with Scroll Wheel - PS2/USB Windows XP Professional with CD	6.00	981.50	5,889.00
Total Other Charges:			5,889.00
Make checks payable to Corporate		Invoice Subtotal:	5,889.00
		Sales Tax:	0.00
		Invoice Total:	5,889.00

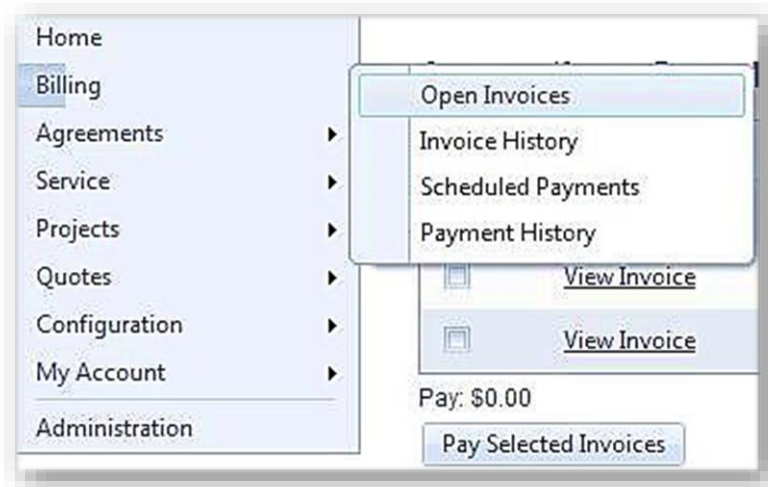
Thank you for your business!

Sending comments or questions about a specific invoice.

1) Click on the 'Pay Bills' icon located top center of the page



2) Or mouse over 'Billing' on the left column and click on 'Open Invoices'



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Accounting - Open Invoices

<input type="checkbox"/>	Due Date ▾	Invoice #	PO #	Total	Balance	Pending Payment	Scheduled Payment	AutoPay Payment	
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<input type="checkbox"/>	View Invoice 09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice

Pay: \$0.00

Click on the 'Comment On Invoice' link to the right of the invoice that you wish to comment on. This will load a page that looks similar to this;

Comment On Invoice

Invoice # 594

Comment:

B *I* U

This is where you go to contact your MSP provider and ask about this specific invoice.

Design HTML Preview

Send Comment

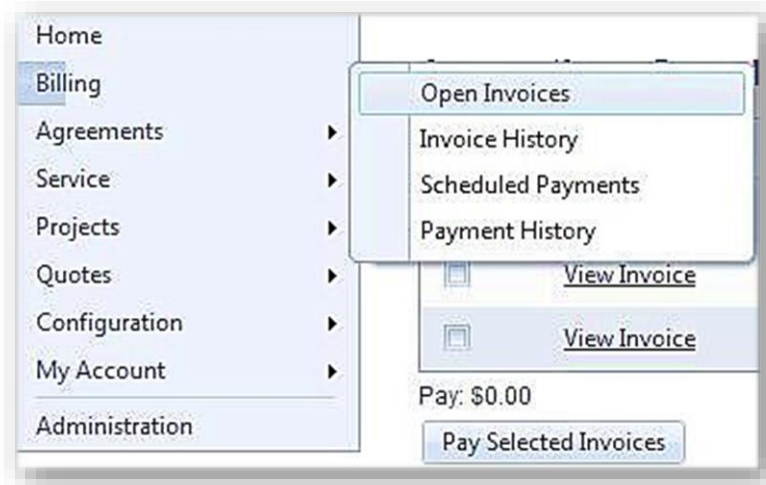
Enter your questions or comments in the provided comment box and click on 'Send Comment'.

Select all open invoices for payment

1) Click on the 'Pay Bills' icon located top center of the page



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Accounting - Open Invoices

<input type="checkbox"/>	Due Date	Invoice #	PO #	Total	Balance	Pending Payment	Scheduled Payment	AutoPay Payment	
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<input type="checkbox"/>	View Invoice 09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice

Pay: \$0.00

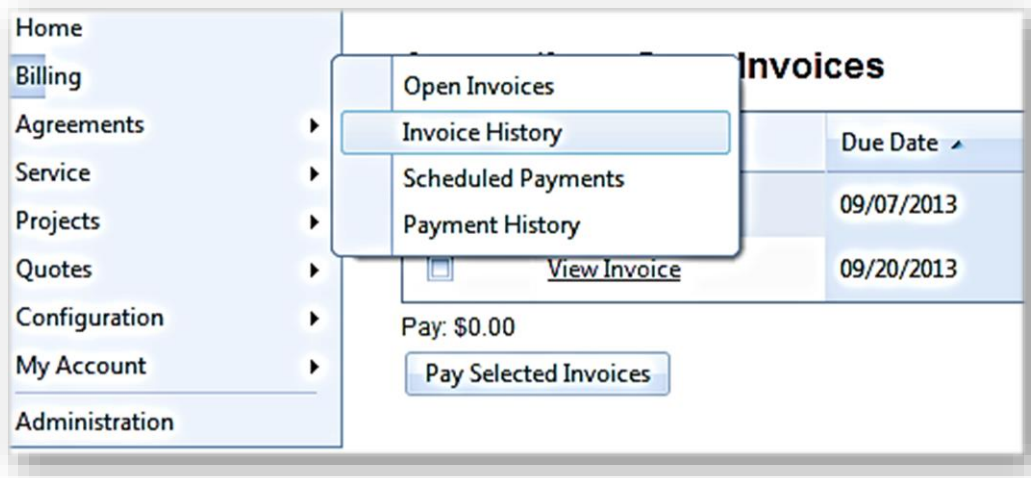
To make a payment on all open invoices at one time check the box in the very upper left hand corner, or check the box to the left of each individual invoice.

NOTE: You may select multiple invoices without selecting them all.

Click on the 'Pay Selected Invoices' button and choose your method of payment in the screens that follow.

Reviewing Invoice History

Mouse over 'Billing' and click on 'Invoice History'.



A page of the most recent invoices paid will appear. You will find previous paid invoices in subsequent pages.

Invoice History

	Invoice Date ▾	Due Date	Invoice #	PO #	Total	Balance
View Invoice	09/10/2013	09/20/2013	598		\$1,650.00	\$1,650.00
View Invoice	08/28/2013	09/07/2013	592		\$5,000.00	\$0.00
View Invoice	08/28/2013	09/07/2013	593		\$1,350.00	\$0.00
View Invoice	08/28/2013	09/07/2013	594		\$5,889.00	\$0.00
View Invoice	08/28/2013	09/07/2013	595		\$1,762.50	\$0.00
View Invoice	08/28/2013	09/07/2013	597		\$3,715.00	\$0.00
View Invoice	08/06/2013	08/16/2013	591		\$637.50	\$0.00
View Invoice	08/05/2013	08/15/2013	579		\$2,212.50	\$0.00
View Invoice	08/05/2013	08/15/2013	580		\$4,162.50	\$0.00
View Invoice	08/05/2013	08/15/2013	581		\$6,435.00	\$0.00

Navigation: [Home] [Back] [1] 2 3 4 5 6 7 8 9 10 ... [Next] [End] Page size: 10 322 items in 33 pages

Click on 'View Invoice' link of the invoice that you wish to see.

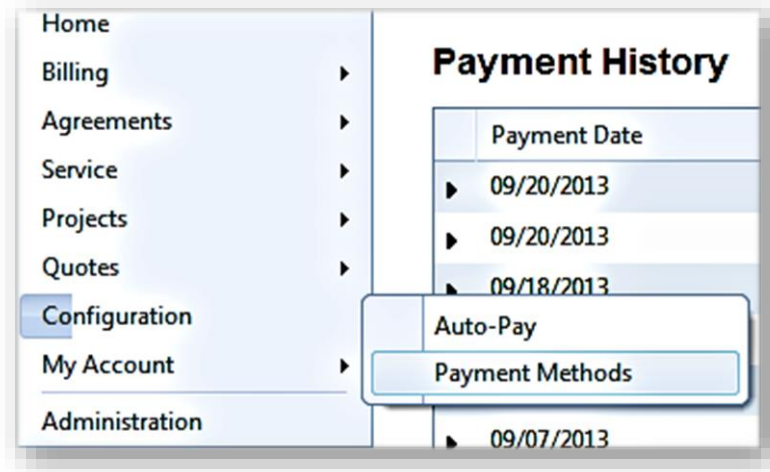
This will load a snapshot of that invoice in your browser and may look similar to this.

Bill To:		Date	Invoice
Demo Company Attn: Demo Owner P.O. B0x 527 Detroit, MI 92344-0527		08/28/2013	594
		Account	
		Demo Company	
Terms	Due Date	PO Number	Reference
Net 10 days	09/07/2013		
Billing Method		Actual Rates	
Detail		Wed 8/28/2013/12:35 PM CDT/ Training User15-	
Resolution			
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Ship To Address	711 N. Franklin St. 813-178-2000 Detroit, MI 92344		
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Total Other Charges:			5,889.00
Make checks payable to Corporate		Invoice Subtotal:	5,889.00
		Sales Tax:	0.00
		Invoice Total:	5,889.00

Thank you for your business!

Payment Method Creation Instructions.

Begin by mosing over the 'Configuration' link and then select 'Payment Methods'.



You can then add a credit card or checking account payment method by clicking on the appropriate selection.



Your chosen payment method type will appear for you to fill out and save.

Name For This Account:	<input type="text"/>
Cardholder's Company:	<input type="text" value="Demo Company"/>
Cardholder's First Name:	<input type="text" value="Demo"/>
Cardholder's Last Name:	<input type="text" value="Owner"/>
Card Number:	<input type="text"/>
Expiration (MMYY):	<input type="text"/>
CVV:	<input type="text"/>
Billing Information:	
Address	<input type="text" value="711 N. Franklin St."/>
City	<input type="text" value="Detroit"/>
State	<input type="text" value="MI"/>
Zip	<input type="text" value="92344"/>
Country	<input type="text" value="United States"/>
<input type="button" value="Cancel"/>	<input type="button" value="Save Payment Information"/>

Account Name:	<input type="text"/>
Accountholder's Company:	<input type="text" value="Demo Company"/>
Accountholder's First Name:	<input type="text" value="Demo"/>
Accountholder's Last Name:	<input type="text" value="Owner"/>
Bank Routing Number:	<input type="text"/>
Confirm Routing Number:	<input type="text"/>
Account Number:	<input type="text"/>
Confirm Account Number:	<input type="text"/>
Billing Information:	
Address	<input type="text" value="711 N. Franklin St."/>
City	<input type="text" value="Detroit"/>
State	<input type="text" value="MI"/>
Zip	<input type="text" value="92344"/>
Country	<input type="text" value="United States"/>
<input type="button" value="Save Payment Information"/>	<input type="button" value="Cancel"/>

Once the payment method has been saved you can edit it by clicking on 'Edit' to the left of that chosen method of payment.

Payment Methods

Add Credit Card Add ACH

	Account Name	Payment Method	Account (Last 4 #s)	Exp Date	
Edit	Test CC	CC	1111	12/15	Remove
Edit	Test ACH	ACH	3456		Remove

Editing a method of payment is similar to creating one.

Name For This Account:

Cardholder's Company:

Cardholder's First Name:

Cardholder's Last Name:

Card Number:

Expiration (MMYY):

CVV:

Billing Information:

Address:

City:

State:

Zip:

Country:

Once you save the edited method and save it you are done!