

PORTAL INTRODUCTION

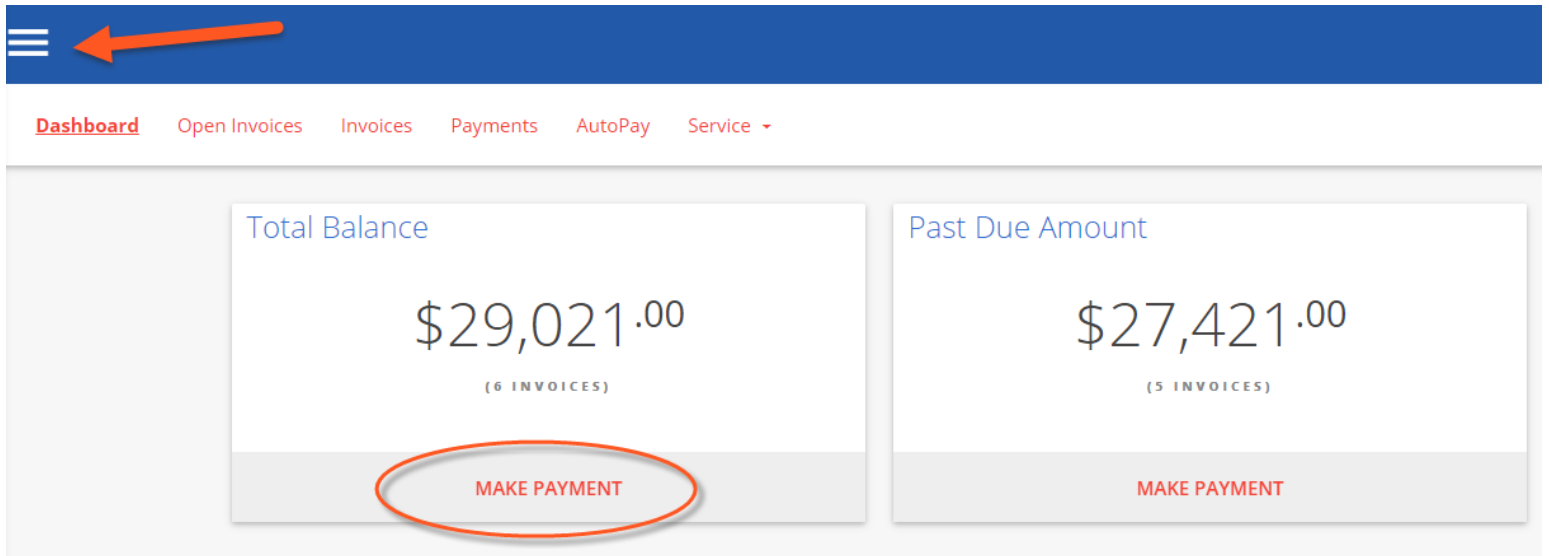
A Quick "How-To" Guide

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.

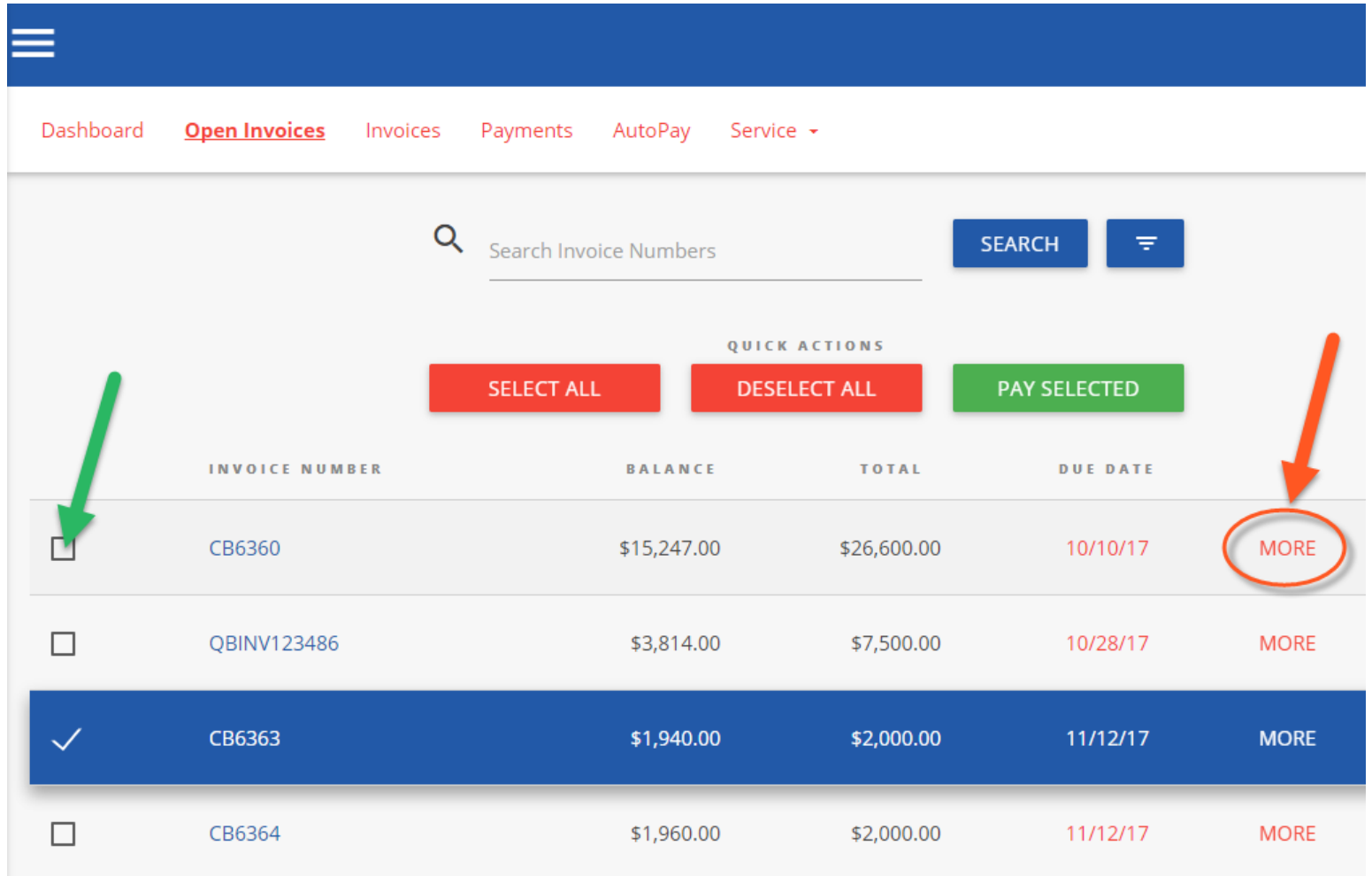


The screenshot shows a blue navigation bar at the top with a three-bar menu icon on the left, indicated by an orange arrow. Below the navigation bar, the dashboard content is displayed. The navigation menu includes: **Dashboard**, Open Invoices, Invoices, Payments, AutoPay, and Service ▾. The main content area features 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. The "MAKE PAYMENT" button in the "Total Balance" tile is circled in orange.


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 **SEARCH** 

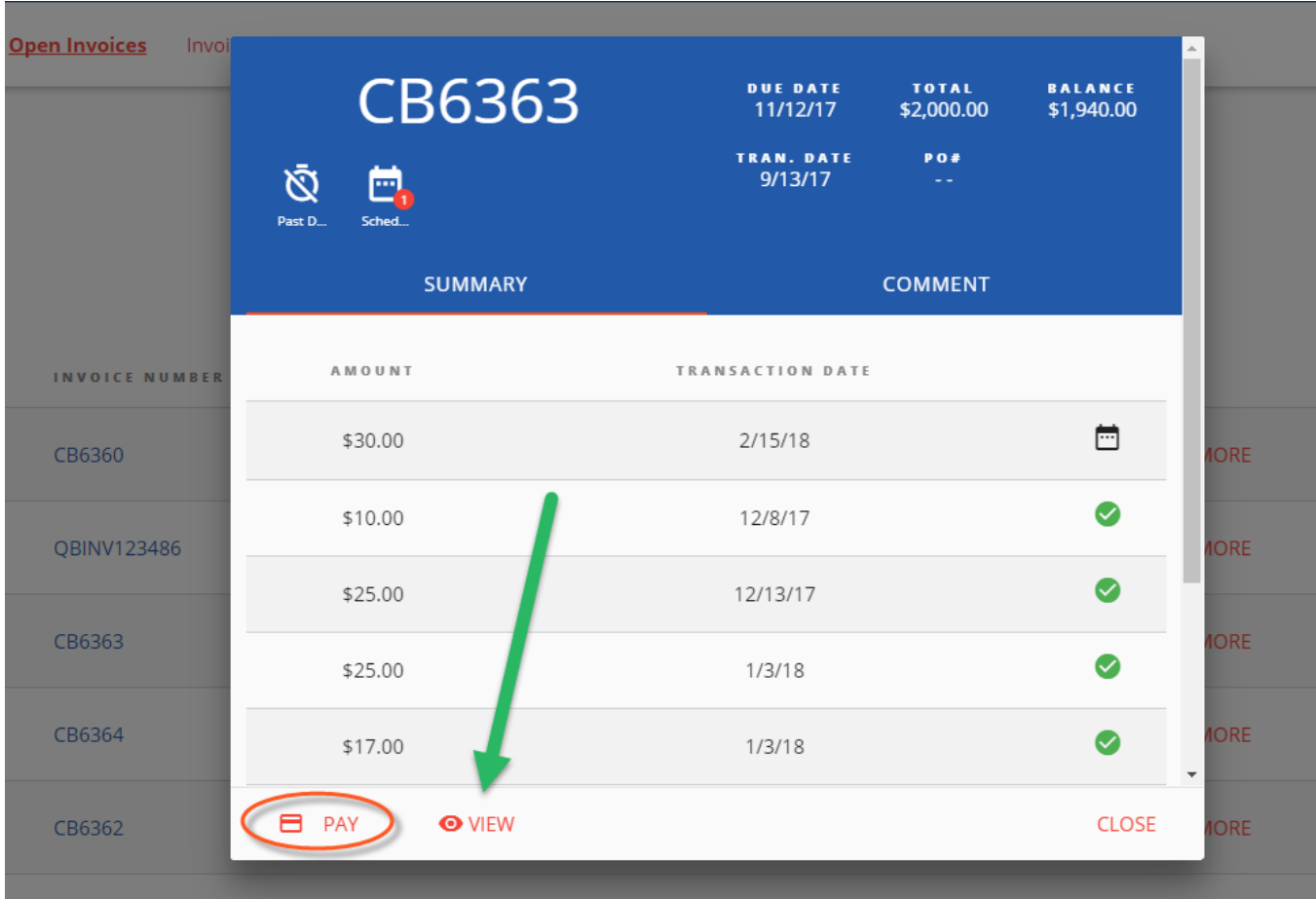
QUICK ACTIONS

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	✅
CB6364	\$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


 test | 1111

+

Invoices

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

Schedule Payment

Off On

CANCEL

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

SUBMIT

Advanced Payment Options:

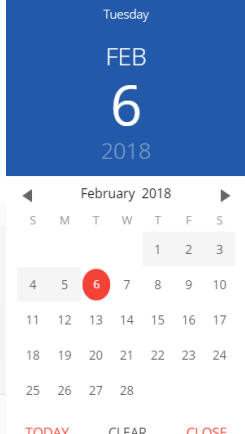
- Selecting the "Schedule Payment" switch to "ON" offers the ability to pick a specific payment date, using the Date Picker.
 - This is not an "auto-pay", but rather a one-time payment for the future.

Schedule Payment

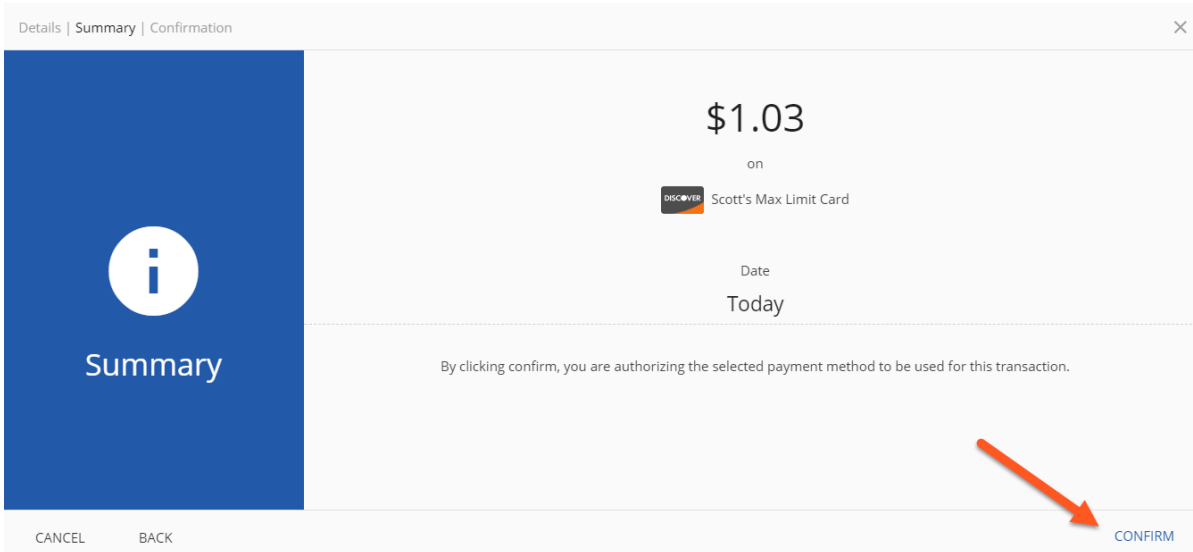
Off On

6 February, 2018


CANCEL



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



Details | Summary | Confirmation

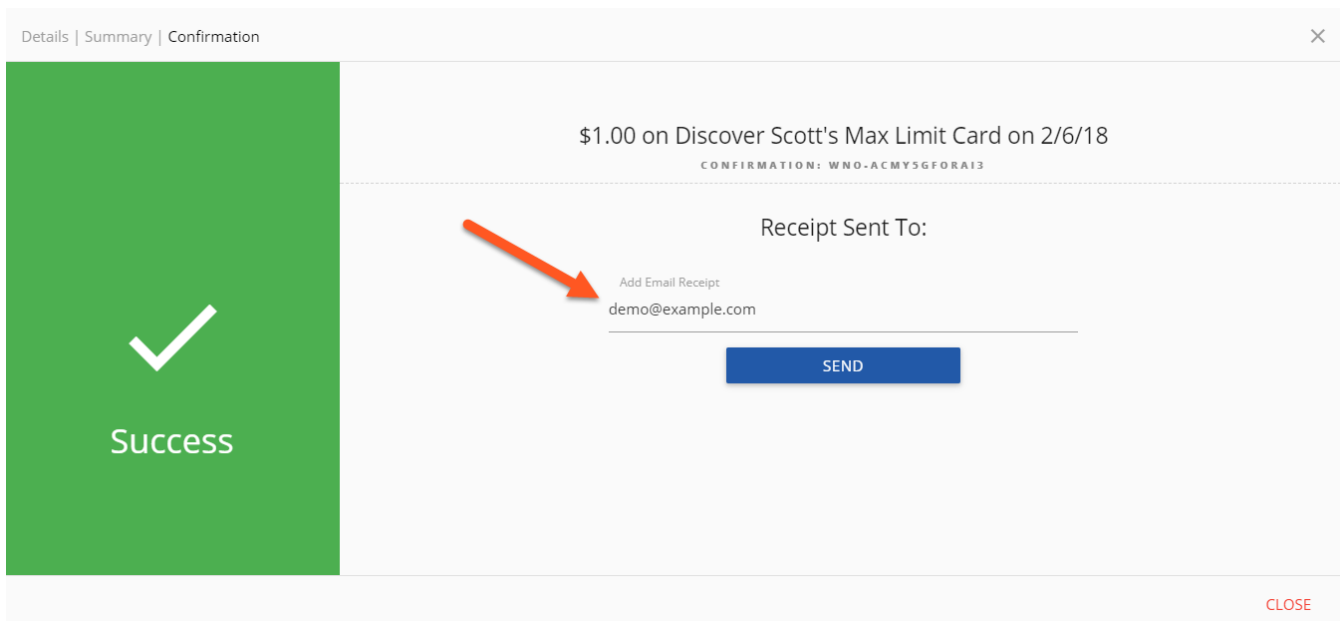
\$1.03
on
 Scott's Max Limit Card
Date
Today

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.



Details | Summary | Confirmation

\$1.00 on Discover Scott's Max Limit Card on 2/6/18
CONFIRMATION: WNO-ACMYS6FORA13

Receipt Sent To:
Add Email Receipt
demo@example.com

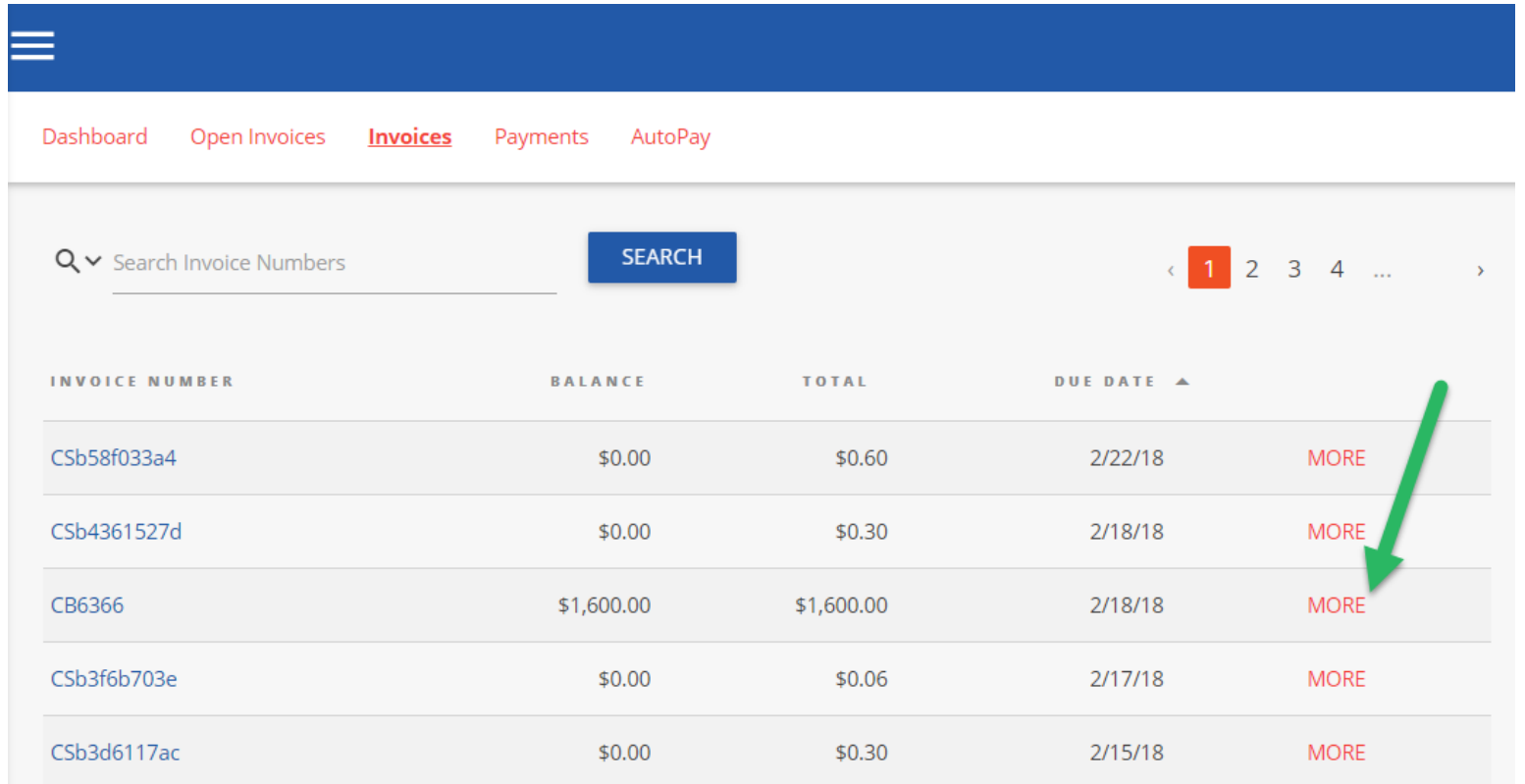
SEND

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



The screenshot shows the 'Invoices' section of the Munimentum interface. At the top, there is a blue navigation bar with a hamburger menu icon on the left and navigation links for 'Dashboard', 'Open Invoices', 'Invoices' (highlighted), 'Payments', and 'AutoPay'. Below the navigation bar is a search area with a search box containing the text 'Search Invoice Numbers' and a blue 'SEARCH' button. To the right of the search box is a pagination control showing page numbers 1, 2, 3, 4, and an ellipsis, with page 1 highlighted in a red box. Below the search area is a table with the following columns: 'INVOICE NUMBER', 'BALANCE', 'TOTAL', 'DUE DATE', and 'MORE'. The table contains five rows of invoice data. A green arrow points to the 'MORE' link in the third row of the table.


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



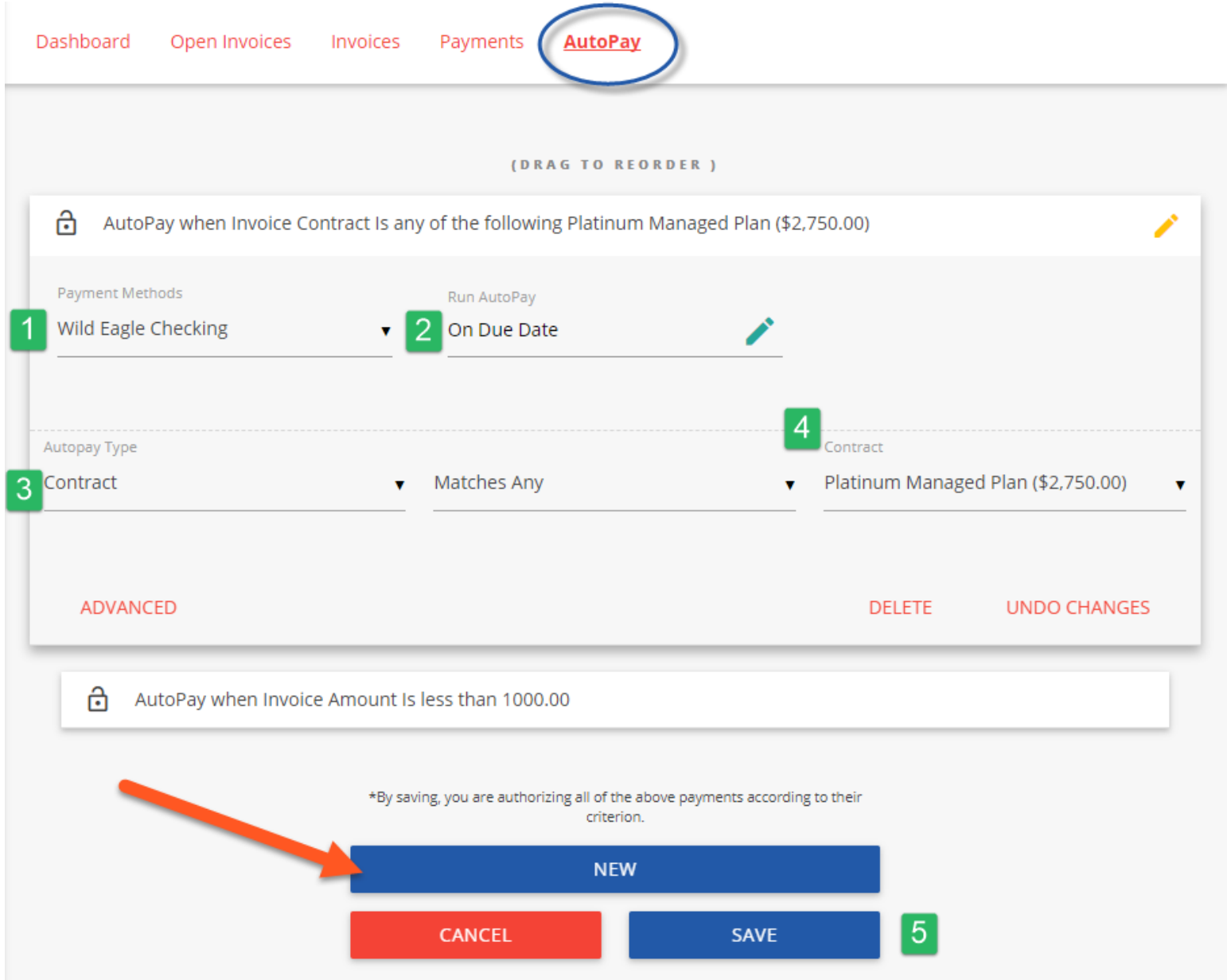
ABC Mercantile



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!



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 4 Contract

3 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.

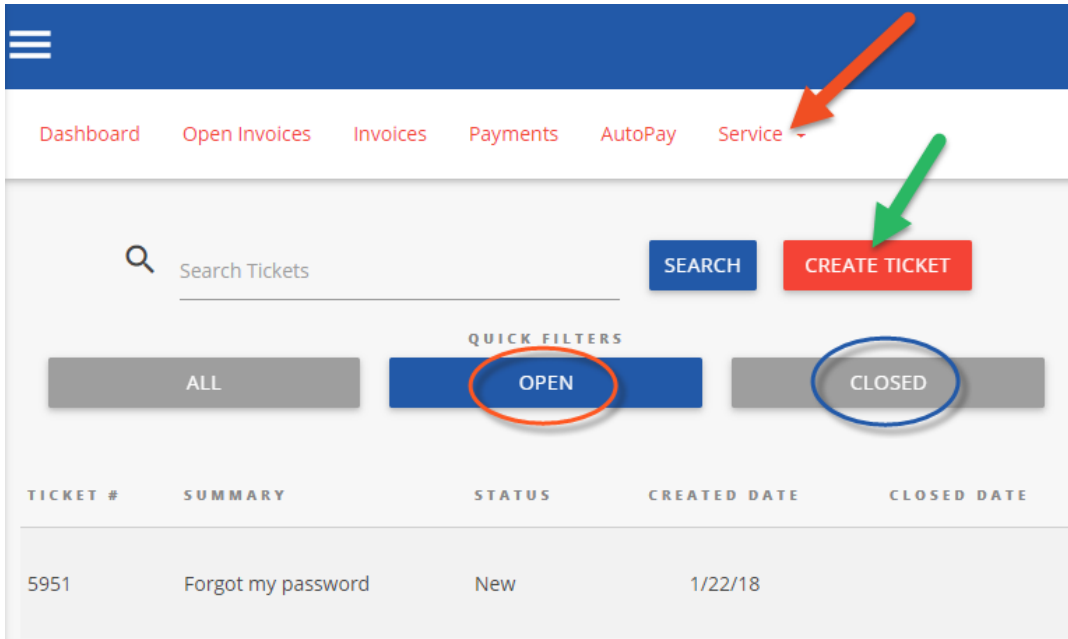
NEW CANCEL SAVE 5

- 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.



Dashboard Open Invoices Invoices Payments AutoPay Service

Search Tickets SEARCH CREATE TICKET

QUICK FILTERS

ALL OPEN CLOSED

TICKET #	SUMMARY	STATUS	CREATED DATE	CLOSED DATE
5951	Forgot my password	New	1/22/18	

Submit a Ticket

- 1 Summary
- 2 Department Choose department
- 3 Description

CANCEL SUBMIT

Mobile

Mobile device navigation:

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

