

# Viewing/Paying Invoices

STEP ONE:

Check your email

When we upload a new invoice to your portal, you'll receive a notification via email, similar to the one below.

NOTE: if you're expecting an invoice but don't see an email, try checking your junk/spam folders. If you see this email in one of those folders, be sure to mark it as "Not Spam" so that future messages reach your inbox!

Drafts	inbox	image	and mail	mobile	
Meet	🗌 🚖 No Reply	Thomas & Company CPA has sent you an	Invoice - Hello Test, To view the invoice plea	se log into the portal or use the link below	2:47 PM
New meeting	🗌 🚖 Olifii Team	OpenWeatherMap API Instruction - Dear C	ustomer! Thank you for subscribing to Free (	OpenWeatherMap! API key: - Your API key i	Fab 25
🕮 🛛 Join a meeting	🗌 🚖 OWNI Team	OpenWeatherMap Account confirmation -	Dear Customer! Thank you for choosing Ope	nWeatherMap! Please confirm your email	Path 25

### STEP TWO:

Log in and locate the invoice

Log into your portal and navigate to the the **Invoices** tab. Here, you'll be able to view all of your invoices, including those you've already paid. Locate the invoice in question (if it's new, it should be at the top). When you're ready to pay your invoice, press the **Make Payment** button.

CERTIFICO PUBLIC ACCOUNTANT		Privacy Settings Logout	
Dipload New Document	Documents Invoices		
Drag and Drop Browse File			Q =
	Invoice #1003 Mar 2, 2021		🚍 Make Payment
My Information	Test Client		
Full Name Test Client			
Email			_

### STEP THREE: Select "Add Card"

After pressing the Make Payment button, you'll see a popup like the one below. The first step is to press the **add card** button – <u>even if you plan on paying with ACH</u>. \*A note on payment security can be found at the bottom of this guide

	Meles a Dayment		Drivoov Settings L	.ogout 🕁
🔓 Upload New Document	Payment Details 2 Revi	ew and Pay 3 Receipt		
Drag and Drop <u>Browse File</u>	Invoice # 1003 Test Client Total Invoice \$0 Paid Amount \$0	Select APX Payment Method D01 Payment Amount: \$0.01	+ Add Card	Q =
<b>My Information</b> Full Name Test Client Email	Remaining \$0	2.01	CLOSE NEXT	

## STEP FOUR:

Select a payment type, then enter your information

After pressing Add Card you will be prompted to enter payment information. At the top, select either **Credit Card** or **E-Check/ACH** (<u>Automated Clearing House</u>), then enter the information for the card/account you would like to pay with. When you're finished, press NEXT.

Select APX Payment Method	+ Add Card	Select APX Payment Method	+ Add Ca
ayment Amount: \$0.01		Payment Amount: \$0.01	
Payment Information		Payment Info	rmation
Credit Card      E-Check / AC	н	🔿 Credit Card 🧿	E-Check / ACH
Name on Card		Name on Account	
Card Number		Account Number F	Youting Number
Expiry Month - Expiry Year	•	Account Type 👻	
Billing Address		Billing Address	
City Country United States	<b>*</b>	City C	Jnited States
State - Zip		State - Z	ίp
Email		Email	
We'll send a receipt to this email address SUBMIT		We'll send a receipt to this email address	r
@ AD)'	-	🤒 AP	<u>).</u>
AND A DOMAIN			
c			CLOSE

Client Portal Guide – Viewing and Paying Invoices Thomas & Company CPA

## STEP FIVE:

Select the card/account from the APX Payment Method menu

After you've added a payment method, you must select it by clicking the checkbox next to it in the Payment Method menu, as shown below. Once you have a payment method checked, press NEXT.

Invoice # 1003		Soloct ABX Davin	aant Mathad			
Test Client		Select AFA Fayli	nent wethou		+	Add Card
Total Invoice	\$0.01	Acct. Ty	pe Acct. Number	Expiration	Acct. Name	Delet
Paid Amount	\$0.00					-
Remaining	\$0.01	Visa				
		Payment Amoun	t: \$0.01			

### STEP SIX:

Confirm your details and submit your payment

					Drivaov
Make a Payment					
Payment Details 2	Review and Pay	3 Receipt			
PAYMENT DETAILS					
Invoice # 1003					
Test Client					
Total Invoice	\$0.01				
Paid Amount	\$0.00				
Remaining Amount	\$0.01				
Payment Data		Payment Ama	upt		
Payment Date		Payment Amo	unt		
March 2, 2021		\$0.01			
6.4.51					
🦉 APX			CLOSE	PREVIOUS	PAY
ABACUS PAYMENT EXCHANGE					

**Congratulations!** You've successfully paid your invoice using the secure client portal.

We'll be notified by email when you've submitted a payment on your portal. If you'd like to view all of the invoices on your portal, you may do so by navigating again to the **Invoices tab** at the top.

Notice that invoices you've already fully paid display a balance of \$0.00, as well as a message that says "Paid in Full."

THOMAS & COMPANY CERTIFIED PUBLIC ACCOUNTANT	Privacy Settings Log	out 🖯
🚦 Upload New Document	Documents Invoices	
Drag and Drop Browse File		Q =
My Information	Invoice #1003 Mar 2, 2021     S0.00 - Paid in Full     Test Client	
Full Name Test Client		
Email An an an ann an Ann an Ann an Ann		
Last Login March 2, 2021, 2:29:14 PM		

## \*A Note on Payment Security:

Our client portal uses Abacus Payment Exchange (APX) to process electronic payments. A note from APX on security & compliance:

"Your customers can be confident that their data is secure. We are fully in compliance with industry standards like the Payment Card Industry Data Security Standard (PCI DSS), using PCIcompliant 256-bit encryption to protect client payment data."

Here are a few resources that provide more information on APX & security:

- <u>APX Landing Page</u>
- <u>Article: Abacus Unveils Integrated, Secure Credit Card and E-Check</u>
   <u>Processing</u>
- Article: AbacusNext Launches the Abacus Payment Exchange