



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 the Managed IT Force portal dashboard. At the top is a blue navigation bar with a three-bar menu icon on the left, indicated by an orange arrow. Below the navigation bar is a horizontal menu with links: [Dashboard](#), [Open Invoices](#), [Invoices](#), [Payments](#), [AutoPay](#), and [Service](#) with a dropdown arrow. The main content area features two large white 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 grey footer bar with a red 'MAKE PAYMENT' button. The 'MAKE PAYMENT' button on the 'Total Balance' tile is circled in red.

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 Invoic

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


Scott's Max Limit Card | 1640


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

S	M	T	W	T	F	S
					1	2
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.

Details | Summary | Confirmation


Summary

\$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.


[CONFIRM](#)

CANCEL BACK

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


Success

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

CONFIRMATION: WNO-ACMY56FORA13

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



[Dashboard](#) [Open Invoices](#) [Invoices](#) [Payments](#) [AutoPay](#)

 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** (which is circled in blue). Below the navigation bar, there is a section titled '(DRAG TO REORDER)'. 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 yellow edit icon. The rule is configured with the following settings:

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

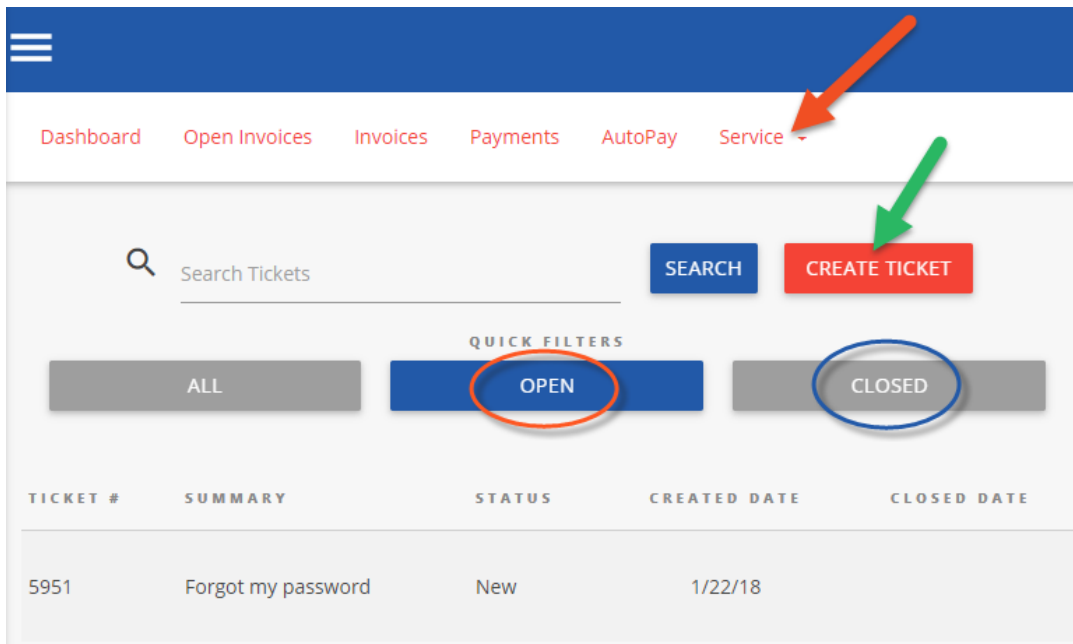
At the bottom of the rule configuration, there are three buttons: **ADVANCED**, **DELETE**, and **UNDO CHANGES**. Below the first rule, there is a second rule titled 'AutoPay when Invoice Amount Is less than 1000.00'. At the bottom of the interface, there is a message: '*By saving, you are authorizing all of the above payments according to their criterion.' Below this message, there are three buttons: **NEW** (highlighted with an orange arrow), **CANCEL**, and **SAVE** (labeled with a green '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

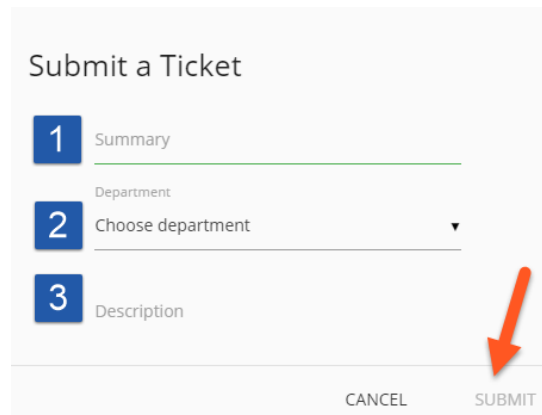
Click on the “Service” menu option:

- 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 top navigation bar with a blue background and a white hamburger menu icon on the left. The navigation bar contains the following links: Dashboard, Open Invoices, Invoices, Payments, AutoPay, and Service. An orange arrow points to the Service link. Below the navigation bar is a search bar with a magnifying glass icon and the text "Search Tickets". To the right of the search bar are two buttons: a blue "SEARCH" button and a red "CREATE TICKET" button. A green arrow points to the "CREATE TICKET" button. Below the search bar is a "QUICK FILTERS" section with three buttons: "ALL", "OPEN", and "CLOSED". The "OPEN" button is highlighted with an orange circle, and the "CLOSED" button is highlighted with a blue circle. Below the filters is a table with the following columns: TICKET #, SUMMARY, STATUS, CREATED DATE, and CLOSED DATE. The table contains one row with the following data: 5951, Forgot my password, New, 1/22/18.

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



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

