### 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'

Home		
Billing	ſ	Open Invoices
Agreements	•	Invoice History
Service	E	Scheduled Payments
Projects	•	Payment History
Quotes	•	View Invoice
Configuration	×.	View Invoice
My Account	•	The second second second
		Pay: \$0.00
Administration		Pay Selected 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.

		Due Date 🔺	Invoice #	PO #	Total	Balance	Pending Payment	Scheduled Payment	AutoPay Payment	
	View Invoice	09/07/2013	594		\$5,889.00	\$3,389.00	<u>/</u>			Comment On Invoice
	<u>View Invoice</u>	09/07/2013	596		\$5,450.00	\$5,450.00				Comment On Invoice
	View Invoice	09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice
ay: \$	0.00									
Pay	Selected Invoice	s								

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

		Due Date 🔺	Invoice #	PO #	Total	Balance	Pending Payment	Scheduled Payment	AutoPay Payment	
	View Invoice	09/07/2013	594		\$5,889.00	\$3,389.00	2			Comment On Invoice
1	View Invoice	09/07/2013	596		\$5,450.00	\$5,450.00				Comment On Invoice
1	View Invoice	09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice

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.

	nding Payment	Scheduled Payment	Invoice #	PO #	Total	Balance	Payment Amount
09/07/2013	2		594		\$5,889.00	\$3,389.00	\$3389.00
aying 1 invoices. Total a	amount on invoices to	pay: \$3389.00					
elect payment method:	Test ACH	•					
	Test ACH ACH - ***********345	56					
elect payment method: ay Now © Pay Futu	Test ACH ACH - ***********345						

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

Due Date	Pending Payment	Scheduled Payment	Invoice #	PO #	Total	Balance	Payment Amount
09/07/2013	<u> </u>		594		\$5,889.00	\$3,389.00	\$3389.00
ying 1 invoices	s. Total amount on invoices	to pay: \$3389.00					
elect payment n	nethod: Test ACH	•					
elect payment n	nethod: Test ACH	•					
		•					
elect payment n ay Now 💿 Pa		•					

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

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.

## 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.

Due Date		Per	nding	Payn	nent		S	cheduled Pa	ayment
09/07/2013	0.9		1	•					
Paying 1 invoice	s. To	otal ar	mour	nt on i	invoid	ces to	pay:	\$0.00	
Calest novement	math	od [	T	ACUL				-	
Select payment	meu	100.	l est /	ACH					
🛛 Pay Now 🔍 P	ay F	utur	е						
	ay F	utur	e						
◎ Pay Now ◎ P scheduled Date:							2003		
	ay F	Futur		ctob	er 201	_	*	••	
scheduled Date:				ctob T	er 201 W	_	۱ ۶	₩ S	
		•	0	1002030303	COMPANY.	.3	28	1200	
scheduled Date:		∙ s	0 M	T	W	.3 T	F	S	
cheduled Date:	<b>44</b> 40	<ul> <li>▲</li> <li>S</li> <li>29</li> </ul>	0 M 30	T 1 8	W 2	.3 T 3	F 4 11	S 5	
cheduled Date:	<b>41</b>	<ul> <li>\$</li> <li>29</li> <li>6</li> </ul>	0 M 30 7	T 1 8	W 2 9	.3 T 3 10	F 4 11 18	S 5 12	
cheduled Date:	<ul> <li>41</li> <li>40</li> <li>41</li> <li>42</li> </ul>	<ul> <li>√</li> <li>S</li> <li>29</li> <li>6</li> <li>13</li> </ul>	0 M 30 7 14	T 1 8 15	W 2 9 16	3 T 3 10 17	F 4 11 18	S 5 12 19	

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

Due Date	Pending Payment	Scheduled Payment
09/07/2013	<u> </u>	
Paying 1 invoices	s. Total amount on invoices	to pay: \$0.00
Select payment r	nethod: Test ACH	
🖗 Pay Now 🍥 Pa	ay Future	
Pay Now ● Pa 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.

P	ayment Receipt
Ap Su To Inv	heduled Payment Date: 10/28/2013 plied Amount: \$0.00 rrcharge Amount: \$0.00 tal Amount: \$0.00 voices Paid: 594 syment Type: ACH
Th	ank 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



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

Home		
Billing	ſ	Open Invoices
Agreements	•	Invoice History
Service	×	Scheduled Payments
Projects	•	Payment History
Quotes	•	View Invoice
Configuration	•	View Invoice
My Account	•	The last set of the last set o
A 10000 - 200,000		Pay: \$0.00
Administration		Pay Selected 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.

		Due Date 🔺	Invoice #	PO #	Total	Balance	Pending Payment	Scheduled Payment	AutoPay Payment	
l v	View Invoice	09/07/2013	594		\$5,889.00	\$3,389.00	2			Comment On Invoice
l v	View Invoice	09/07/2013	596		\$5,450.00	\$5,450.00				Comment On Invoice
l v	View Invoice	09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice

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.

				Date	Invoice	3
Demo Company				08/28/2013	594	
Attn: Demo Owner P.O. BOx 527				Account	A	
Detroit, MI 92344-052	27			Demo Com	npany	
Terms	Due Date	PO Number	Reference			
Net 10 days	09/07/2013					
Billing Method	Actual R	ates				
Detail	Wed 8/2	8/2013/12:35 PM CE	T/ Training User1	15-		
Resolution						
Company Name	Demo C	omoany				
Contact Name	Demo O					
Ship To Address		ranklin St.				
onp to Address	813-178					
Other Charges			]	Quantity	Price	Amoun
Billable Other Charg	es					
Network Certified Wo Intel 1.8 GHZ Pentiur High Speed Motherbo 32 Bit PCI Bus Masi	nkstation m 4 Processor with s pard 400/533mhz bu			6.00	981.50	5,889.0
Network Certified Wo Intel 1.8 GHZ Pentiur High Speed Motherbo 32 Bit PCI Bus Masi Intel ChipSet Shared AGP Videot 1 Mouse / 1 Parallel Audio/Sound Adapter 1200 Megabytes of H 300 Watt Power Sup	rikstation n 4 Processor with 5 bard 400/533mhz buttering Architecture / 4 USB 2.0 Ports / 2 Serial Ports 10. r ligh Speed DDR SDI bly ve enterface ress Time mal 52x Speed face y Drive 3.5" hanced Keyboard Mouse with Scroll W	s /100 Ethernet LAN A RAM Memory	dapter	6.00	981.50	5,889.00
Network Certified Wo Intel 1.8 GHZ Pentiur High Speed Motherbo 32 Bit PCI Bus Masi Intel ChipSet Shared AGP Videot 1 Mouse / 1 Parallel Audio/Sound Adapter 1200 Megabytes of H 300 Watt Power Sup 40 Gigabyte Hard Dn Ultra Enhanced IDE 9.5 Millisecond Acc CD-ROM Player Inter Enhanced IDE Inter 1.44 Megabyte Flopp 104 Key Windows Er Optical Three Button	rikstation n 4 Processor with 5 bard 400/533mhz buttering Architecture / 4 USB 2.0 Ports / 2 Serial Ports 10. r ligh Speed DDR SDI bly ve enterface ress Time mal 52x Speed face y Drive 3.5" hanced Keyboard Mouse with Scroll W	s /100 Ethernet LAN A RAM Memory	dapter -		981.50 her Charges:	5,889.00
Network Certified Wo Intel 1.8 GHZ Pentiur High Speed Motherbo 32 Bit PCI Bus Masi Intel ChipSet Shared AGP Videot 1 Mouse / 1 Parallel Audio/Sound Adapter 1200 Megabytes of H 300 Watt Power Sup 40 Gigabyte Hard Dn Ultra Enhanced IDE 9.5 Millisecond Acc CD-ROM Player Inter Enhanced IDE Inter 1.44 Megabyte Flopp 104 Key Windows Er Optical Three Button	rikstation n 4 Processor with 5 bard 400/533mhz buttering Architecture / 4 USB 2.0 Ports / 2 Serial Ports 10. r ligh Speed DDR SDI bly ve enterface ress Time mal 52x Speed face y Drive 3.5" hanced Keyboard Mouse with Scroll W	s /100 Ethernet LAN A RAM Memory	dapter -		her Charges:	
Network Certified Wo Intel 1.8 GHZ Pentiur High Speed Motherbo 32 Bit PCI Bus Masi Intel ChipSet Shared AGP Videot 1 Mouse / 1 Parallel Audio/Sound Adapter 1200 Megabytes of H 300 Watt Power Sup 40 Gigabyte Hard Dn Ultra Enhanced IDE 9.5 Millisecond Acc CD-ROM Player Inter Enhanced IDE Inter 1.44 Megabyte Flopp 104 Key Windows Er Optical Three Button	rikstation n 4 Processor with 5 bard 400/533mhz buttering Architecture / 4 USB 2.0 Ports / 2 Serial Ports 10. r ligh Speed DDR SDI bly ve enterface ress Time mal 52x Speed face y Drive 3.5" hanced Keyboard Mouse with Scroll W	s /100 Ethernet LAN A RAM Memory /heel - PS2/USB	dapter	Total Oti Invoice Su	her Charges:	5,889.00

### 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'

Home		
Billing	ſ	Open Invoices
Agreements	•	Invoice History
Service	×	Scheduled Payments
Projects	•	Payment History
Quotes	۰	View Invoice
Configuration	×.	View Invoice
My Account	•	
Administration		Pay: \$0.00
Administration		Pay Selected 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.

		Due Date 🔺	Invoice #	PO #	Total	Balance	Pending Payment	Scheduled Payment	AutoPay Payment	
1	View Invoice	09/07/2013	594		\$5,889.00	\$3,389.00	1			Comment On Invoice
1	View Invoice	09/07/2013	596		\$5,450.00	\$5,450.00				Comment On Invoice
1	View Invoice	09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice

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;

omment:	B Z U 🐰 🗈 😩	
	This is where you go to contact your MSP provider and ask about this specific invoice.	
	Design <> HTML Q Preview	

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



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

Home		
Billing	Í	Open Invoices
Agreements	•	Invoice History
Service	×	Scheduled Payments
Projects	•	Payment History
Quotes	•	View Invoice
Configuration	•	View Invoice
My Account	•	
Administration		Pay: \$0.00
, and a second		Pay Selected 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.

1		Due Date 🔺	Invoice #	PO #	Total	Balance	Pending Payment	Scheduled Payment	AutoPay Payment	
1	View Invoice	09/07/2013	594	i A	\$5,889.00	\$3,389.00	<u>^</u>			Comment On Invoice
7	<u>View Invoice</u>	09/07/2013	596		\$5,450.00	\$5,450.00				Comment On Invoice
1	View Invoice	09/20/2013	599		\$5,500.00	\$5,500.00				Comment On Invoice

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**

Home Invoices Billing **Open Invoices** Agreements ۲ Invoice History Due Date 🔺 Service . Scheduled Payments 09/07/2013 Projects ۲ Payment History Quotes View Invoice 09/20/2013 ۲ Configuration ۲ Pay: \$0.00 My Account ۲ Pay Selected Invoices Administration

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

	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
<u>View Invoice</u>	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

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

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.

				Date	Invoice	•
Demo Company				08/28/2013	594	
Attn: Demo Owner P.O. BOx 527				Account	30.00 ···	
Detroit, MI 92344-0527	7			Demo Com	ipany	
Terms	Due Date	PO Number	Reference		j.	
Net 10 days	09/07/2013		-		<u> </u>	
Billing Method	Actual R	ates				
Detail	Wed 8/2	8/2013/12:35 PM CE	T/ Training User	15-		
Resolution						
Company Name	Demo Co	ompany				
Contact Name	Demo O					
Ship To Address		ranklin St.				
onip to Address	813-178 Detroit, M	2000				
Other Charges	in the stream of			Quantity	Price	Amoun
Billable Other Charge	S					
Network Certified Work Intel 1.8 GHZ Pentium High Speed Motherboa 32 Bit PCI Bus Maste Intel ChioSet	4 Processor with s ard 400/533mhz bu ring Architecture			6.00	981.50	5,889.0
Network Certified Worl Intel 1.8 GHZ Pentium High Speed Motherbox 32 Bit PCI Bus Maste	4 Processor with 5 and 400/533mhz bu ring Architecture 4 USB 2.0 Ports 2 Serial Ports 10/ gh Speed DDR SDB y e nterface ss Time hal 52x Speed toce Drive 3.5" hanced Keyboard douse with Scroll W	s /100 Ethernet LAN A RAM Memory	dapter	6.00	981.50	5,889.00
Network Certified Worl Intel 1.8 GHZ Pentium High Speed Motherbox 32 Bit PCI Bus Maste Intel ChipSet Shared AGP Videot / 1 Mouse / 1 Parallel / Audio/Sound Adapter 1200 Megabytes of Hig 300 Watt Power Suppi 40 Gigabyte Hard Driv Ultra Enhanced IDE 9.5 Millisecond Acce CD-ROM Player Intern Enhanced IDE Interfa 1.44 Megabyte Floppy 104 Key Windows Enh Optical Three Button M	4 Processor with 5 and 400/533mhz bu ring Architecture 4 USB 2.0 Ports 2 Serial Ports 10/ gh Speed DDR SDB y e nterface ss Time hal 52x Speed toce Drive 3.5" hanced Keyboard douse with Scroll W	s /100 Ethernet LAN A RAM Memory	dapter -		981.50 ner Charges:	5,889.00
Network Certified Worl Intel 1.8 GHZ Pentium High Speed Motherbox 32 Bit PCI Bus Maste Intel ChipSet Shared AGP Videot / 1 Mouse / 1 Parallel / Audio/Sound Adapter 1200 Megabytes of Hig 300 Watt Power Suppi 40 Gigabyte Hard Driv Ultra Enhanced IDE 9.5 Millisecond Acce CD-ROM Player Intern Enhanced IDE Interfa 1.44 Megabyte Floppy 104 Key Windows Enh Optical Three Button M	4 Processor with 5 and 400/533mhz bu ring Architecture 4 USB 2.0 Ports 2 Serial Ports 10/ gh Speed DDR SDB y e nterface ss Time hal 52x Speed toce Drive 3.5" hanced Keyboard douse with Scroll W	s /100 Ethernet LAN A RAM Memory	dapter -		1er Charges:	5,889.00
Network Certified Worl Intel 1.8 GHZ Pentium High Speed Motherbox 32 Bit PCI Bus Maste Intel ChipSet Shared AGP Videot / 1 Mouse / 1 Parallel / Audio/Sound Adapter 1200 Megabytes of Hig 300 Watt Power Suppl 40 Gigabyte Hard Driv Ultra Enhanced IDE Inter D-ROM Player Intern Enhanced IDE Interfa 1.44 Megabyte Floppy 104 Key Windows Enh Optical Three Button N Windows XP Profession	4 Processor with 5 and 400/533mhz bu ring Architecture 4 USB 2.0 Ports 2 Serial Ports 10/ gh Speed DDR SDB y e nterface ss Time hal 52x Speed toce Drive 3.5" hanced Keyboard douse with Scroll W	s /100 Ethernet LAN A RAM Memory /heel - PS2/USB	dapter -	Total Oti Invoice Su	1er Charges:	

# Payment Method Creation Instructions.

Home		
Billing	•	Payment History
Agreements	•	Payment Date
Service	•	• 09/20/2013
Projects	•	• 09/20/2013
Quotes	•	• 09/18/2013
Configuration		Auto-Pay
My Account	•	Payment Methods
Administration		• 09/07/2013

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.

Payment Methods
+ Add Credit Card + Add ACH

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

Name For This Account:		Account Name: Accountholder's Comp	pany: Demo Company
Cardholder's Company:	Demo Company	Accountholder's First N	
Cardholder's First Name:	Demo	Accountholder's Last N	Jame: Owner
Cardholder's Last Name:	Owner	Bank Routing Number:	
Card Number:		Confirm Routing Numb	per:
Expiration (MMYY):		Account Number:	
CVV:		Confirm Account Num	ber:
Billing Information:		Billing Information:	
Address	711 N. Franklin St.	Address	711 N. Franklin St.
City	Detroit	City	Detroit
State	M	State	MI
Zip	92344	Zip	92344
Country	United States	- Country	United States
	N_2	Save Payment Informa	tion
Cancel	Save Paymer	t Information 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.

Paym	ent Methods				
+ Add	Credit Card + Add ACH				
	Account Name	Payment Method	Account (Last 4 #s)	Exp Date	
Edit	Test CC	СС	1111	12/15	Remove
	Test ACH	ACH	3456		Remove

Editing a method of payment is similar to creating one.

Name For This Account:	Test CC	
Cardholder's Company:	Demo Company	
Cardholder's First Name:	Demo	
Cardholder's Last Name:	Owner	
Card Number:	1111	
Expiration (MMYY):	1215	
CVV:		
Billing Information:		
Address	711 N. Franklin St.	
City	Detroit	
State	MI	
Zip	92344	

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