

# BILL 360

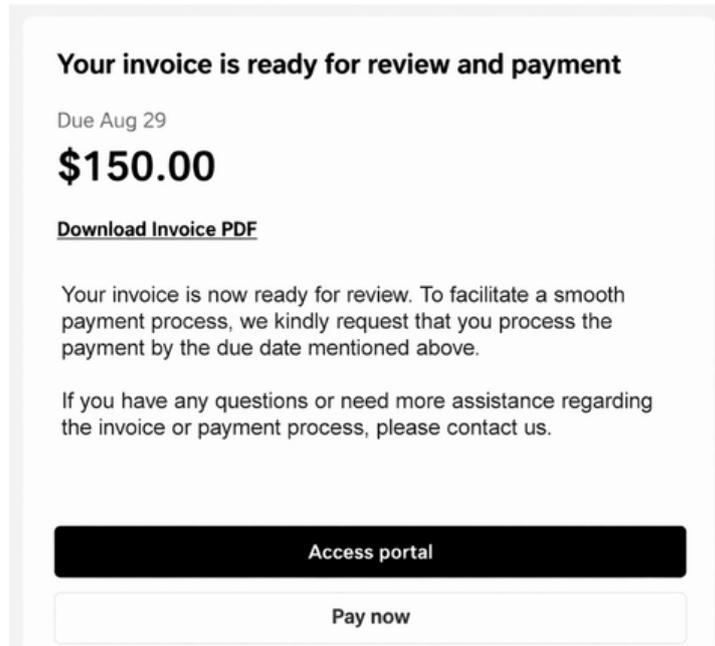
# QUICK START



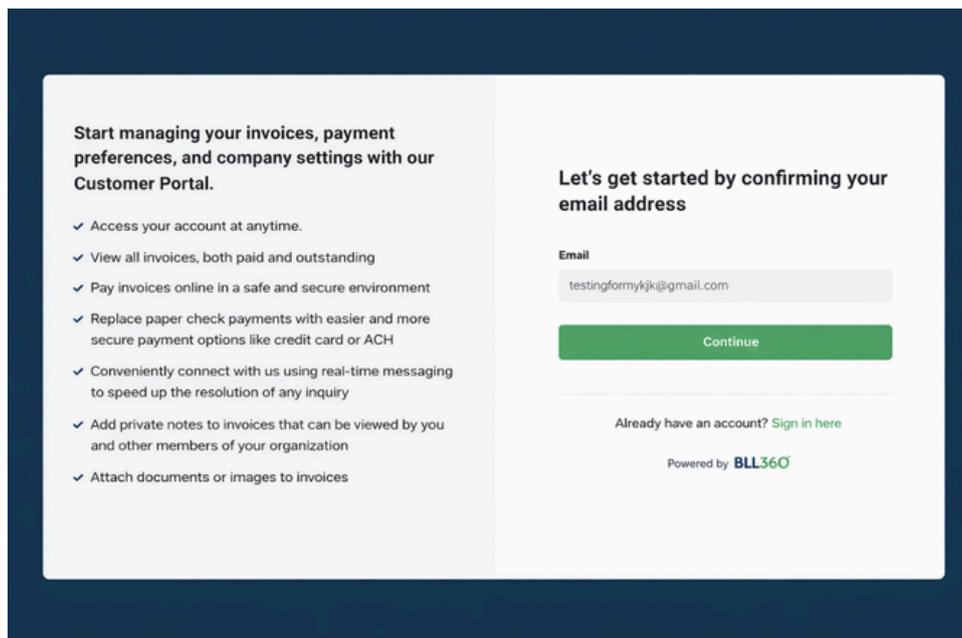
THE SHREDDER  
MEDSHRED

## Logging Into Bill360

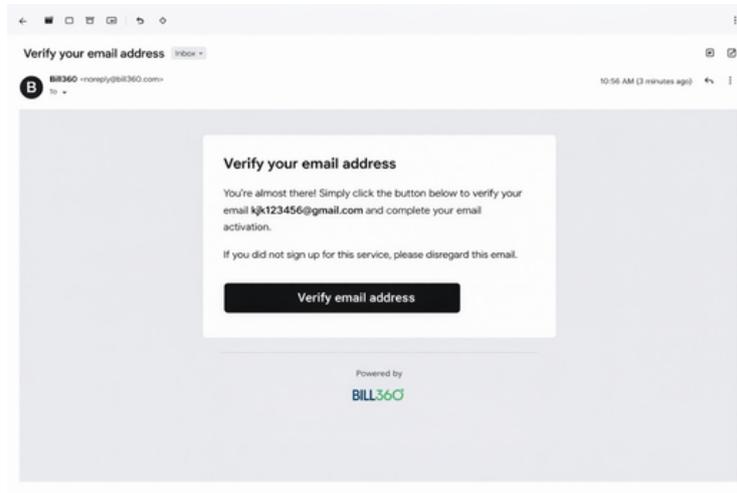
After you have received your first Invoice, select "Access Portal".



Once you click access portal, please verify your email is correct.



Next, please click the verification link in your inbox.



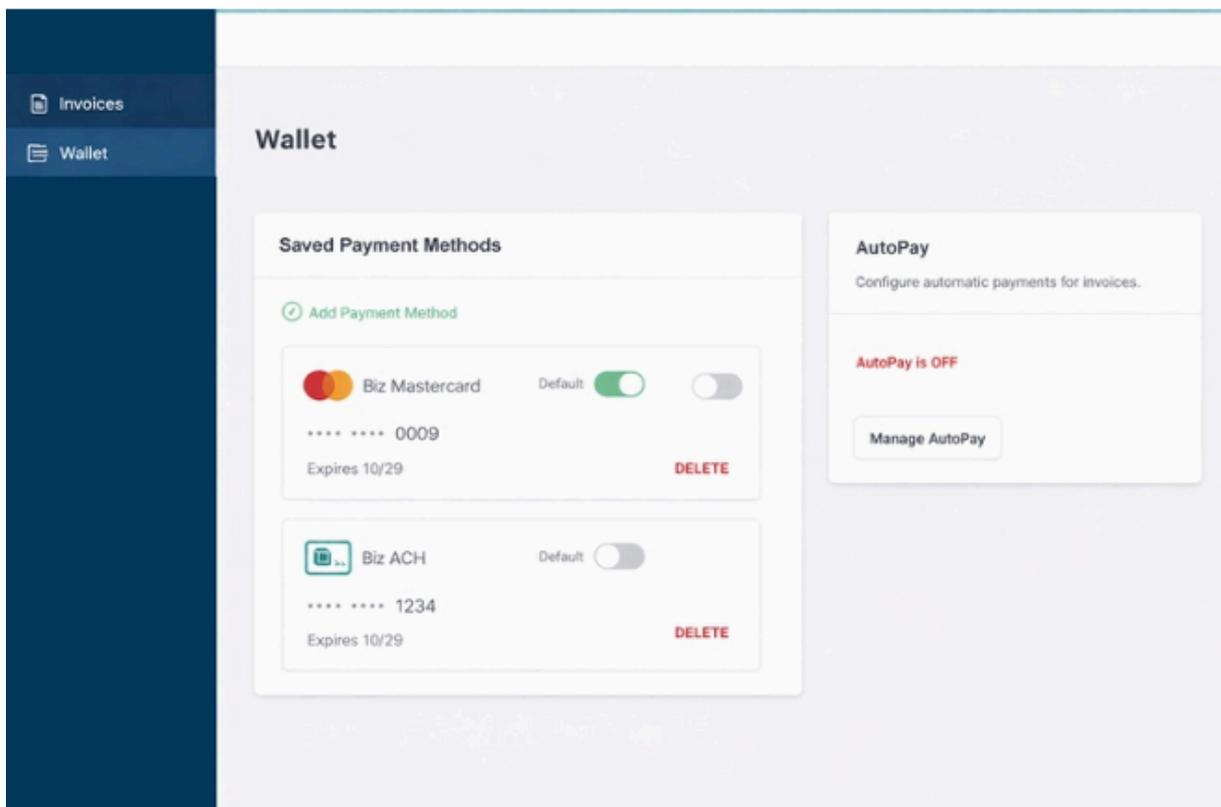
After you have verified your email address, you will be prompted to create your password. Password must be at least 8 characters in length and contain at least one uppercase and one lowercase letter, one number and one symbol. Please also make sure to agree to Bill360's Conditions of Use & Privacy Policy

A screenshot of the BILL360 password creation and login screen. The screen has a dark blue background and a white central form. At the top is the BILL360 logo. Below it is the heading "Please create a password and log in." The form contains three input fields: "User name" with the value "testingformykkjk@gmail.com", "Password", and "Confirm Password". Below the input fields is a text requirement: "Password must be at least 8 characters in length and contain at least one uppercase and one lowercase letter, one number and one symbol." There is a checked checkbox with the text "By proceeding you are agreeing to BILL360 Conditions of Use & Privacy Policy". At the bottom is a green button with the text "Let's get started".

## Customer Wallet

From the Wallet page, customers can manage their payment methods and AutoPay.

**Tip:** Purchasing cards (P-cards) typically have restrictions that do not allow specific purchase types, which could cause your payment to be declined. Therefore, it is recommended that a different payment method be used.

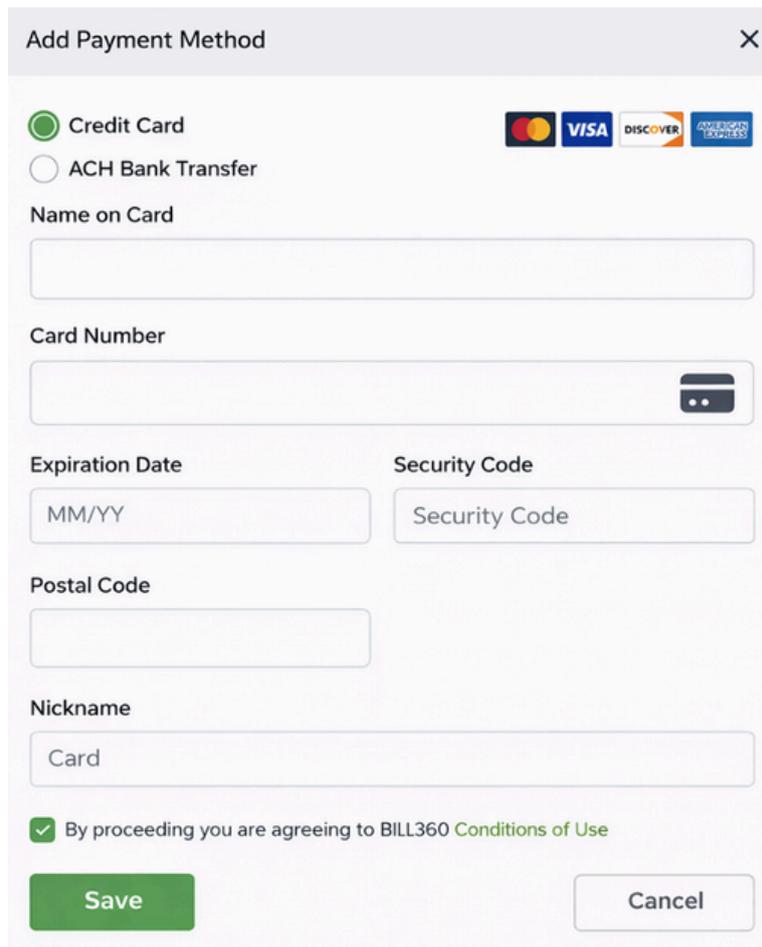


## Add a Payment Method

To add a payment method, complete the following steps:

1. From the Payment Options tab, click **Add Payment Method**.
2. The Add Payment Method window opens. Select the radio button for either credit card or ACH Bank Transfer.
3. For credit cards, enter the card information in the following fields.
  - Name on Card
  - Card Number
  - Expiration Date
  - Security Code (CVC/CW)
  - Zip Code
  - Nickname

The image below is an example of the Credit Card payment option.

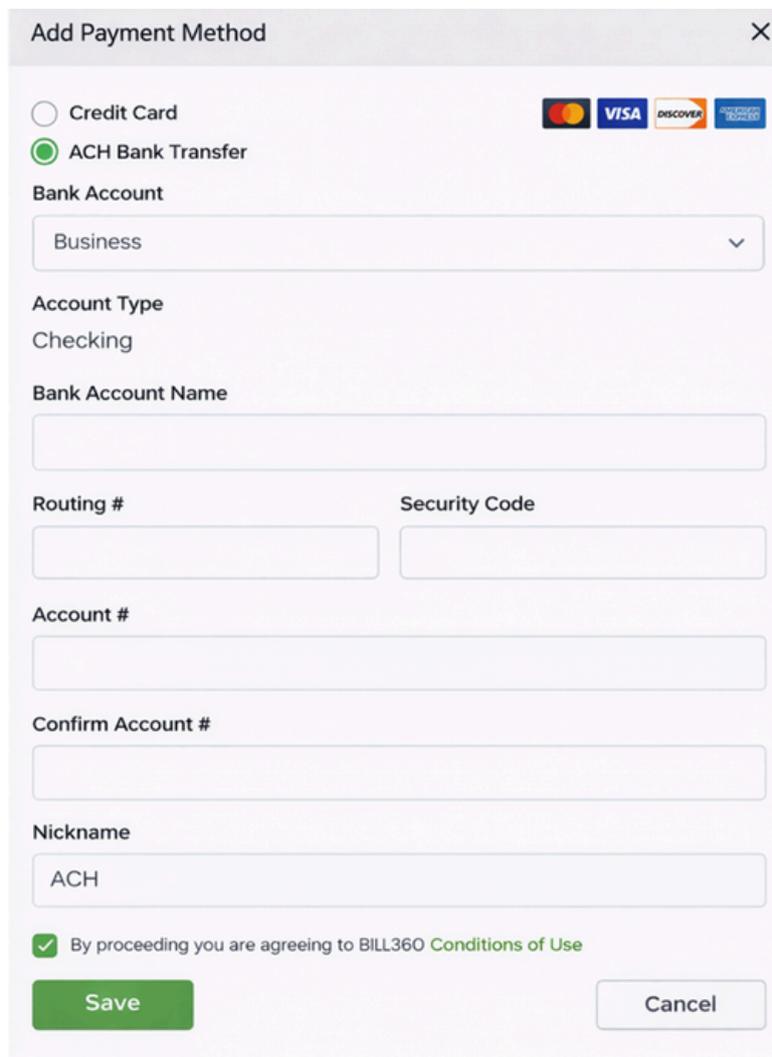


The screenshot shows a window titled "Add Payment Method" with a close button (X) in the top right corner. At the top, there are two radio buttons: "Credit Card" (which is selected) and "ACH Bank Transfer". To the right of these buttons are logos for Mastercard, VISA, DISCOVER, and AMERICAN EXPRESS. Below the radio buttons, there are several input fields: "Name on Card" (a single-line text box), "Card Number" (a single-line text box with a card icon on the right), "Expiration Date" (a text box with "MM/YY" as a placeholder), "Security Code" (a text box with "Security Code" as a placeholder), "Postal Code" (a single-line text box), and "Nickname" (a single-line text box with "Card" as a placeholder). At the bottom, there is a checked checkbox with the text "By proceeding you are agreeing to BILL360 Conditions of Use". Below the checkbox are two buttons: a green "Save" button and a white "Cancel" button.

4. For ACH Bank Transfer, enter the bank account information in the following fields:

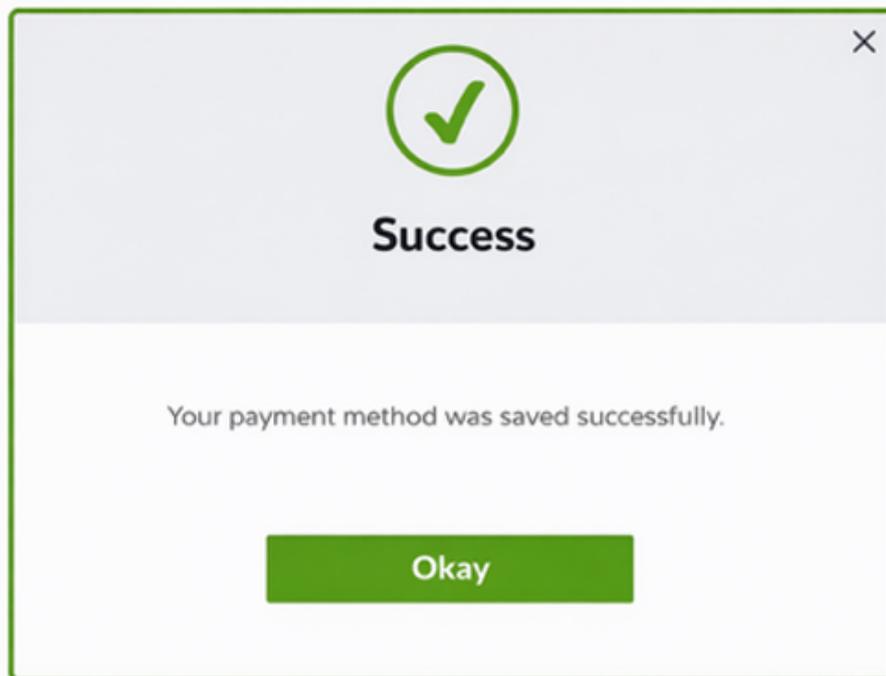
- Bank Account drop-down, select Business or Personal
- Bank Account Name - The name on the account
- Routing #
- Account #
- Confirm Account #
- Nickname

*The image below is an example of the Credit Card payment option.*



The image shows a screenshot of a web application dialog box titled "Add Payment Method". At the top right is a close button (X). Below the title, there are two radio button options: "Credit Card" (unselected) and "ACH Bank Transfer" (selected). To the right of these options are logos for Mastercard, VISA, DISCOVER, and AMERICAN EXPRESS. Below the radio buttons, there are several input fields: "Bank Account" (a dropdown menu currently showing "Business"), "Account Type" (a text field containing "Checking"), "Bank Account Name" (an empty text field), "Routing #" (an empty text field), "Security Code" (an empty text field), "Account #" (an empty text field), "Confirm Account #" (an empty text field), and "Nickname" (a text field containing "ACH"). At the bottom, there is a checked checkbox with the text "By proceeding you are agreeing to BILL360 Conditions of Use". Below this are two buttons: a green "Save" button and a white "Cancel" button.

5. Once all payment information has been entered, click **Save**.
6. A new window opens with a Success message. Click **Okay**.



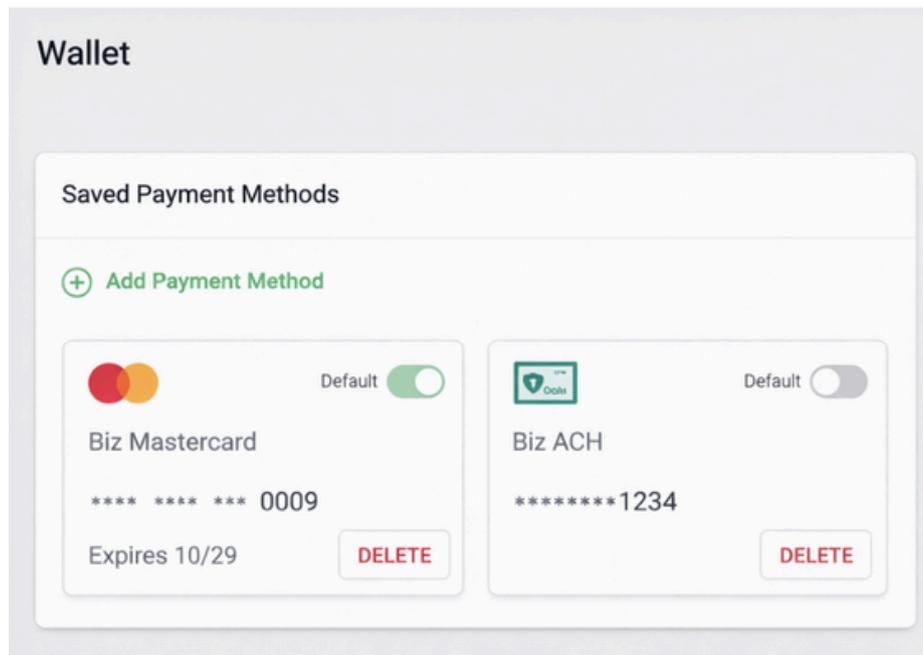
**Note:** The first wallet item becomes the default payment method. You can change the default option should there be more than one payment method.

## Delete a Payment Method

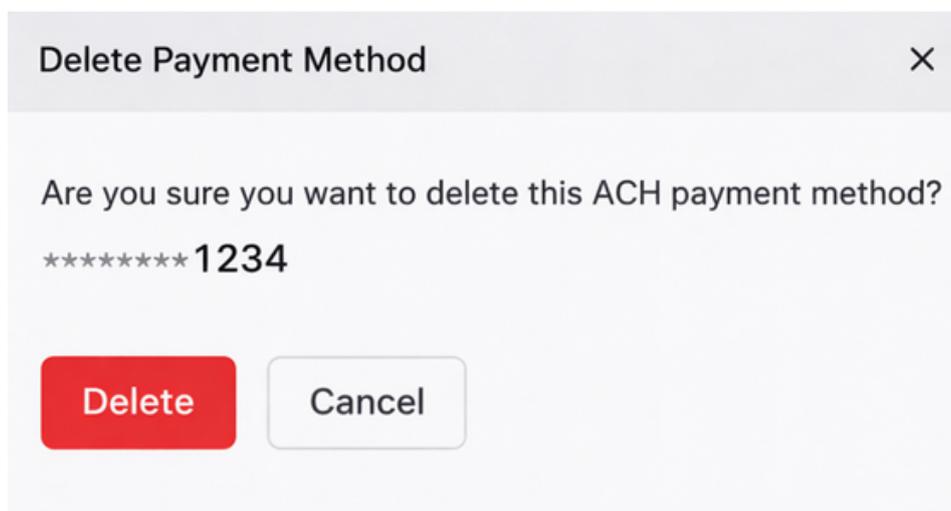
To delete a payment method, complete the following steps:

Note: You need Admin permissions to delete a payment method.

1. Click **Delete** next to the payment method.



2. The Delete Payment Method window opens. Click the **Delete** button to delete the payment method or **Cancel** to save the payment method.

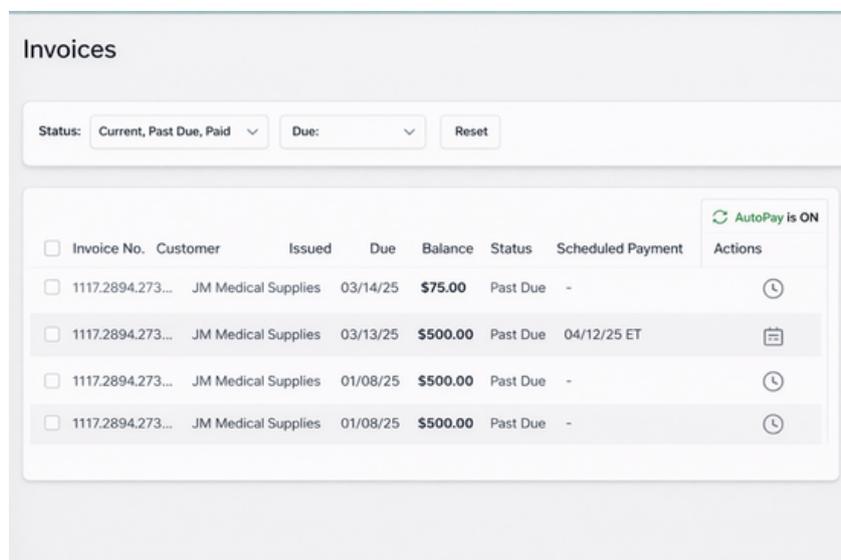


## AutoPay

AutoPay enables you to set-up automatic payments for your invoices (you must have a payment method in your Bill360 Wallet). This feature automatically pays invoices up to a maximum allowable amount that you set. AutoPay currently pays invoices on the day they're due and are processed in Eastern Standard Time. Currently, AutoPay does not cover past-due invoices.

After the Upcoming AutoPay email is sent, Autopay enforces a 1 business day delay before processing the payment; this applies even if AutoPay is set to Due on Receipt/Pay on Receipt. This gives customers time to review surcharge information when applicable. If a payment run is skipped because of this hold, we'll automatically retry the next business day, and it will not be marked as failed.

Autopay will keep trying to process invoices up to 5 days past the due date. This prevents missed payments when invoices are issued very close to their due date and ensures eligible invoices are still collected within a short tolerance window.

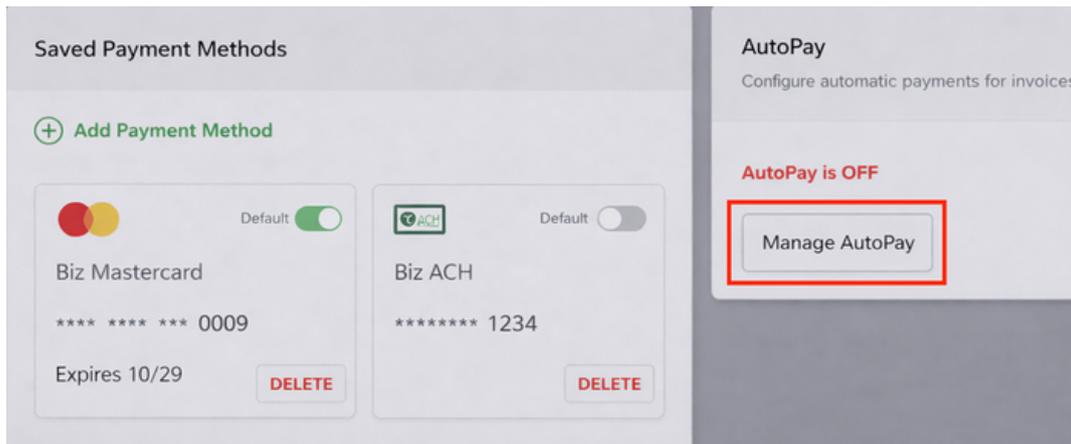


<input type="checkbox"/>	Invoice No.	Customer	Issued	Due	Balance	Status	Scheduled Payment	Actions
<input type="checkbox"/>	1117.2894.273...	JM Medical Supplies	03/14/25	03/14/25	\$75.00	Past Due	-	
<input type="checkbox"/>	1117.2894.273...	JM Medical Supplies	03/13/25	03/13/25	\$500.00	Past Due	04/12/25 ET	
<input type="checkbox"/>	1117.2894.273...	JM Medical Supplies	01/08/25	01/08/25	\$500.00	Past Due	-	
<input type="checkbox"/>	1117.2894.273...	JM Medical Supplies	01/08/25	01/08/25	\$500.00	Past Due	-	

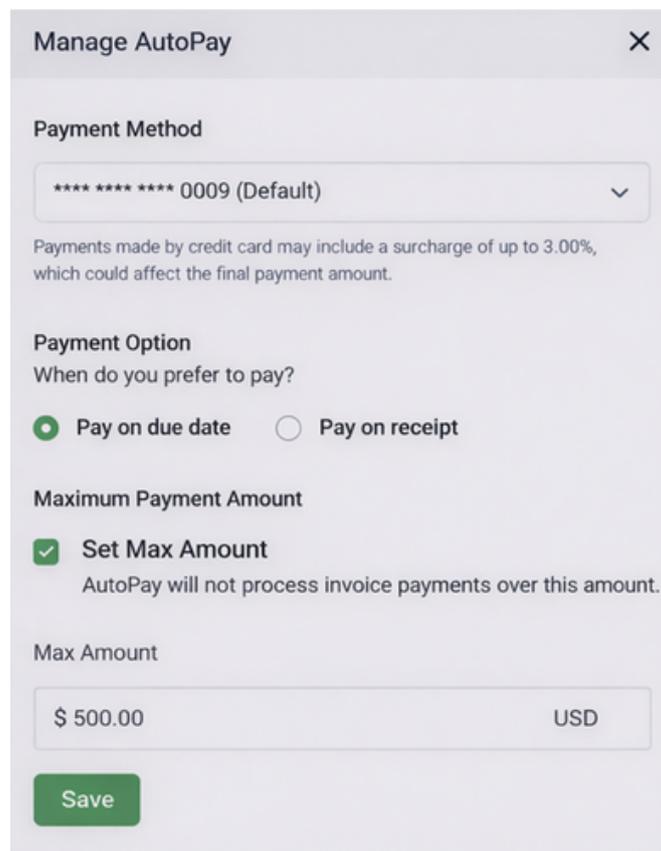
### Set-Up AutoPay

Complete the following steps to set-up AutoPay:

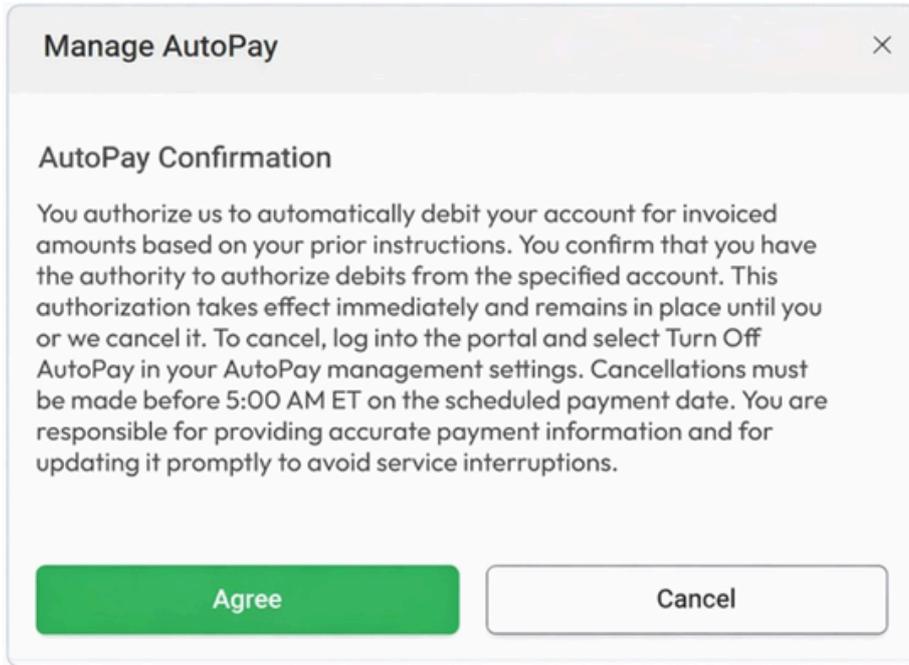
1. From the Settings page, click **Payment Options**.
2. Under AutoPay, click **Manage AutoPay**.



3. The Manage AutoPay window opens. Select a **Payment Method** from the drop-down.
4. Under **Payment Options**, select Pay on due date OR Pay on receipt.
5. If you would like to enter a maximum dollar amount for AutoPay to process an invoice, click the box next to **Set Max Amount**.
6. If applicable, enter the **Max Amount**.
7. Click **Save**.

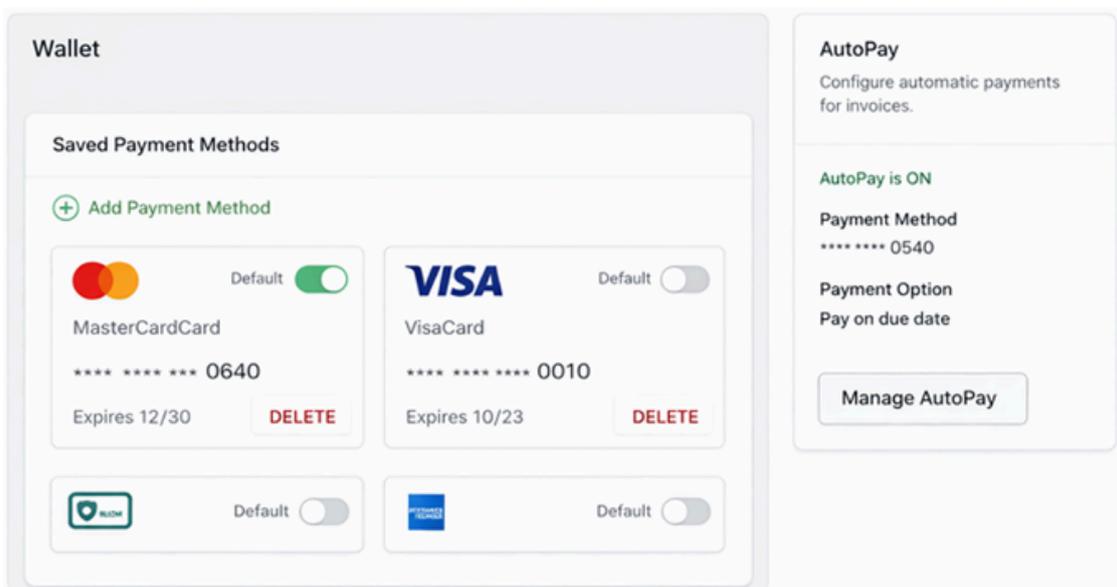


8. The AutoPay Confirmation window opens. Read the confirmation message and then click **Agree** to return to the Payment Options page.

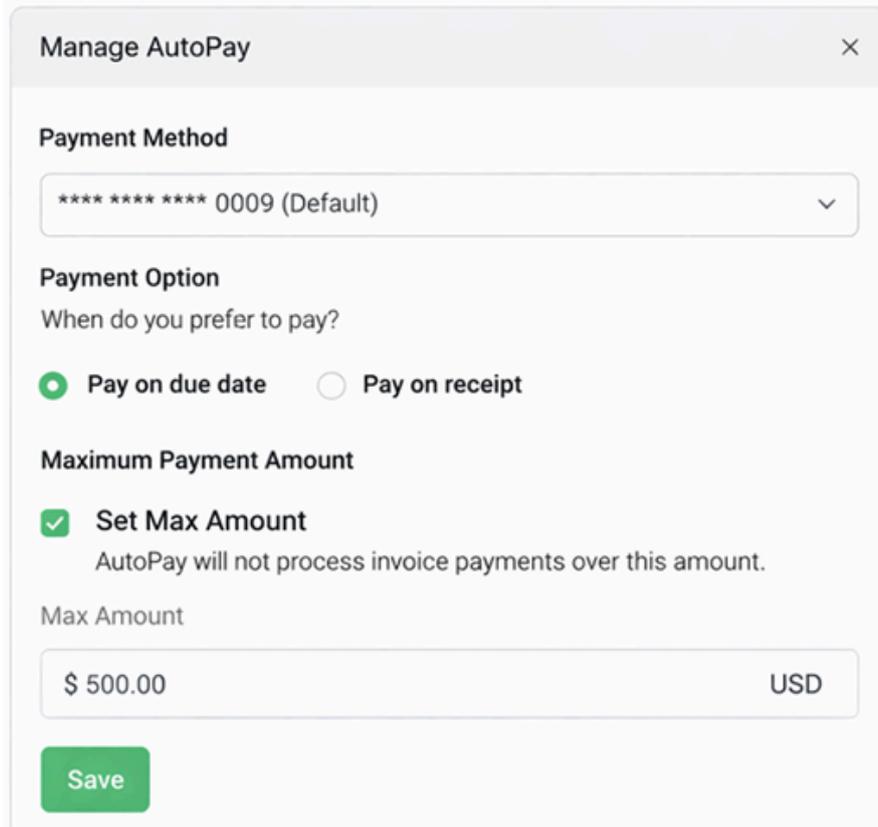


## Edit AutoPay

1. From the Setting page, click **Payment Options**.
2. Under AutoPay, click **Manage AutoPay**.



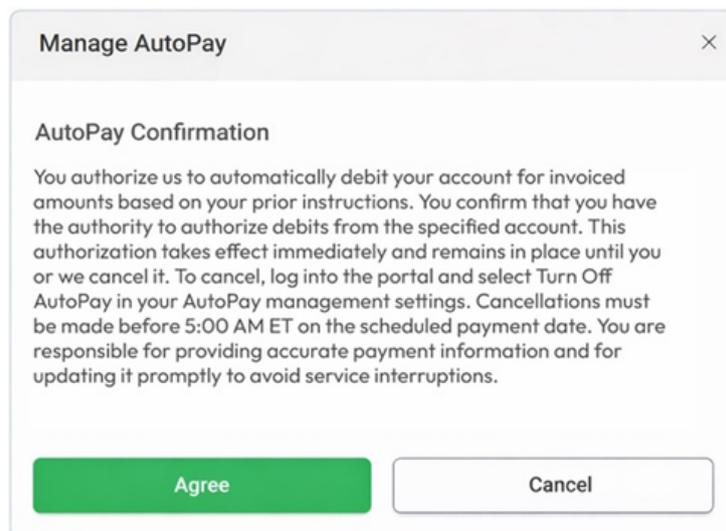
3. Update the **Payment Method**, **Payment Option**, and **Max Amount** options as needed and then click Save.



The screenshot shows a 'Manage AutoPay' window with the following fields and options:

- Payment Method:** A dropdown menu showing '\*\*\*\* \* 0009 (Default)'.
- Payment Option:** A section titled 'When do you prefer to pay?' with two radio buttons: 'Pay on due date' (selected) and 'Pay on receipt'.
- Maximum Payment Amount:** A section with a checked checkbox 'Set Max Amount' and the text 'AutoPay will not process invoice payments over this amount.'
- Max Amount:** A text input field containing '\$ 500.00' and a currency dropdown set to 'USD'.
- Save:** A green button at the bottom left.

4. The AutoPay Confirmation window opens. Read the confirmation message and then click **Agree** to return to the Payment Options page.



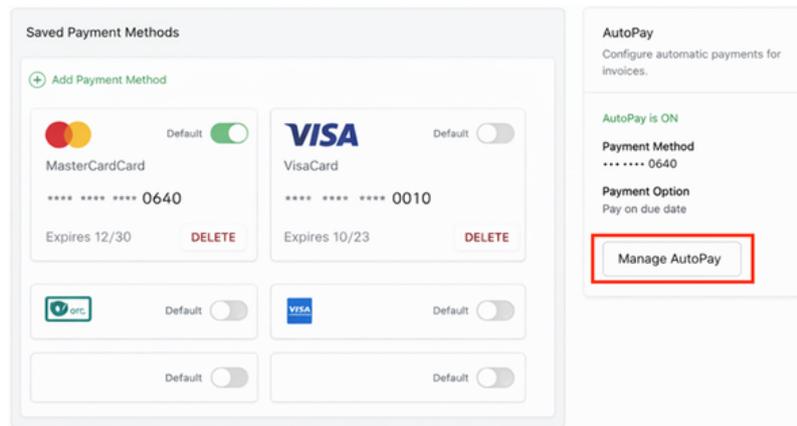
The screenshot shows an 'AutoPay Confirmation' window with the following content:

- AutoPay Confirmation:** A text block explaining the authorization: 'You authorize us to automatically debit your account for invoiced amounts based on your prior instructions. You confirm that you have the authority to authorize debits from the specified account. This authorization takes effect immediately and remains in place until you or we cancel it. To cancel, log into the portal and select Turn Off AutoPay in your AutoPay management settings. Cancellations must be made before 5:00 AM ET on the scheduled payment date. You are responsible for providing accurate payment information and for updating it promptly to avoid service interruptions.'
- Agree:** A green button at the bottom left.
- Cancel:** A white button with a grey border at the bottom right.

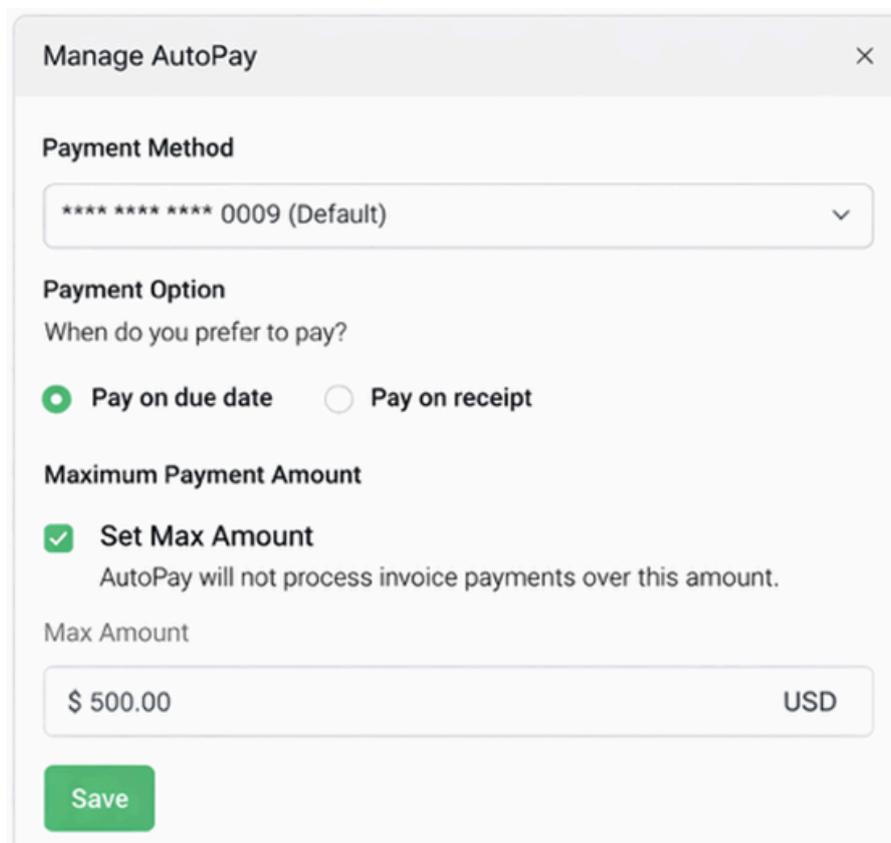
## Turn Off AutoPay

Complete the following steps to turn AutoPay off:

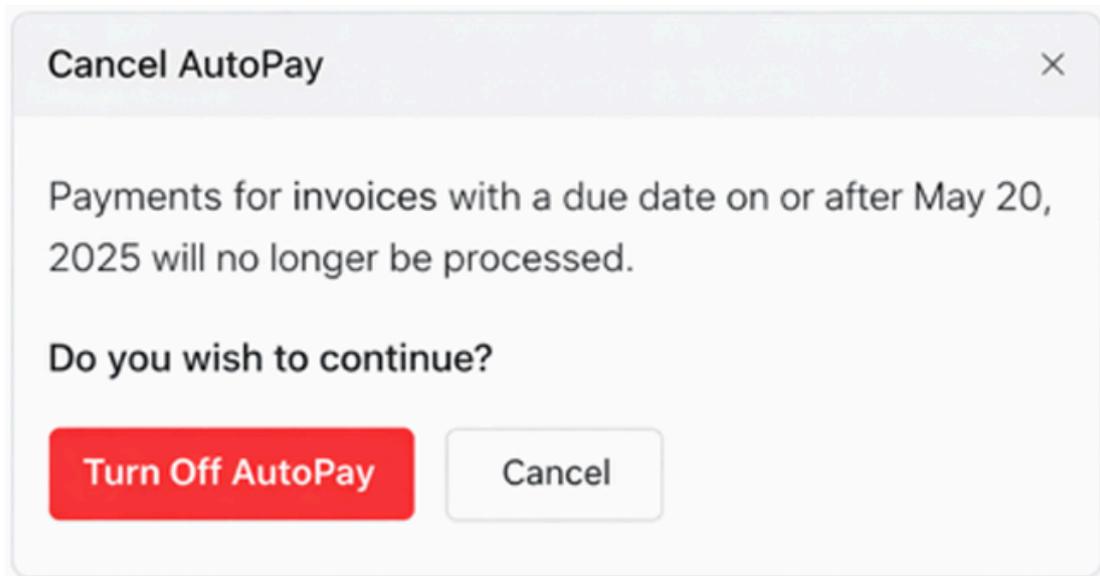
1. From the Settings page, click **Payment Options**.
2. Under AutoPay, click **Manage AutoPay**.



3. Click **Turn Off AutoPay**.



4. The Cancel AutoPay window opens. Click **Turn Off AutoPay** and return to the Payment Options page.

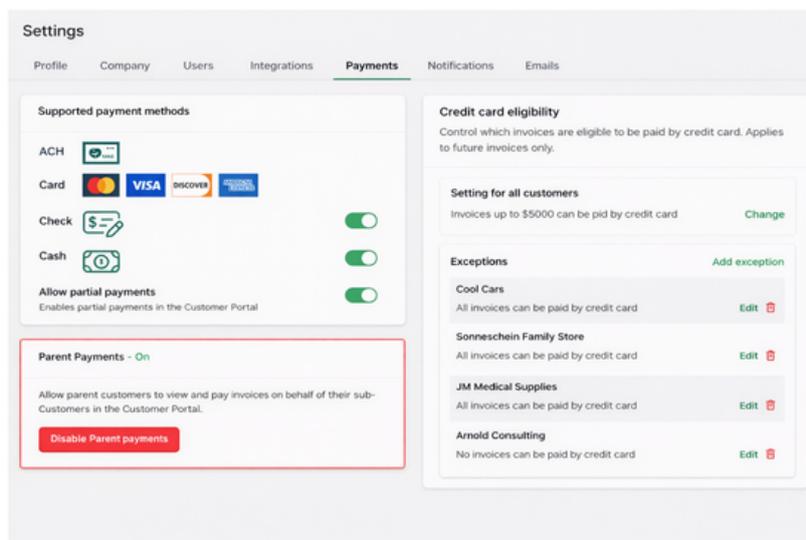


## ParentPay Overview

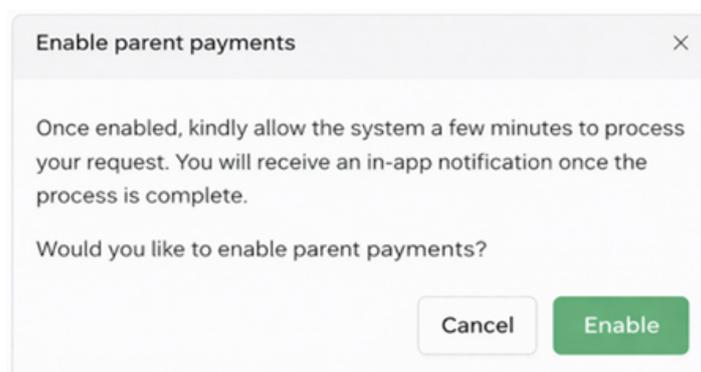
ParentPay allows companies that utilize hierarchical customer structures to manage invoices and payments more efficiently by enabling the parent customer to view and settle all associated sub-customer invoices through a single portal, significantly simplifying the user experience and reducing the administrative burden of gaining access and toggling between numerous accounts.

### ParentPay Activation

To activate ParentPay, navigate to Settings and then select Payments. In the Parent Payments section, click on the Enable Parent Payments button.

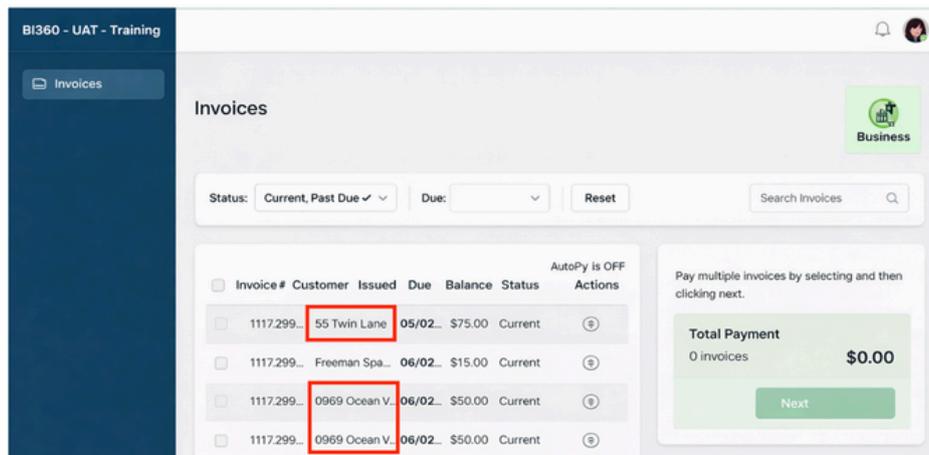


The Enable parent payments window opens, click Enable. Once confirmation, parent customers can view and pay invoices on behalf of their sub-customers directly from their customer portal.



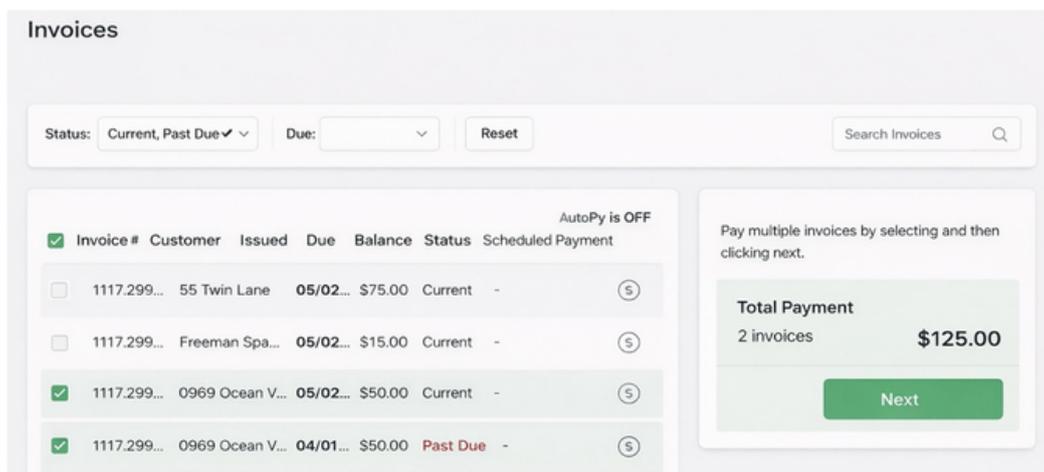
## Parent Customer Portal - Invoice List View

Once ParentPay has been enabled, the Invoices List view in the parent customer portal will be updated to reflect any sub-customer invoices.



## Parent Customer Portal - Payments

From the Invoice List view, parent customer users can use their wallet to pay their invoices, along with invoices for their sub-customers, in a single payment experience.



Next, the parent customer user will navigate to the **Select Payment Method**. User can use a saved payment method, add a new payment method, or make a one-time payment.

Users will then determine their preferred **Payment Option**:

- Pay now
- Pay nearest due date
- Schedule payment

Once selected, users will click the Submit button to finalize the payment.

The screenshot shows a 'Payment' window with a close button (X) in the top right corner. On the left, under 'Select Payment Method', there is a green link 'Add payment method' and a button labeled 'Make one-time payment'. On the right, under 'Summary', there is a table with two rows of payment details. Below the table is a section for 'Payment option' with a dropdown menu set to 'Pay Now', a 'Payment date' of 'May 22', and a 'Payment amount' of '\$125.00'. A summary table shows a 'Subtotal' of '\$125.00' and a 'Total payment' of '\$125.00'. At the bottom of the summary section is a green button labeled 'Submit Payment'.

Summary	
# 1117.2894.274002	\$50.00
# 1117.2894.273999	\$75.00

Payment option:	Pay Now
Payment date:	May 22
Payment amount	\$125.00
<hr/>	
Subtotal	\$125.00
<b>Total payment</b>	<b>\$125.00</b>

After the user submits payment, the Payment Successful window will appear, displaying the associated payment details.