BILL360

# QUICK START

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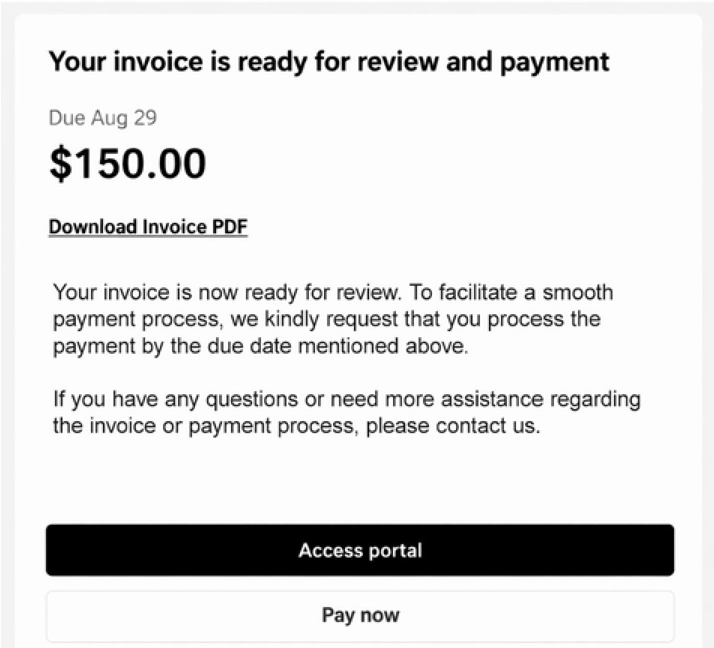
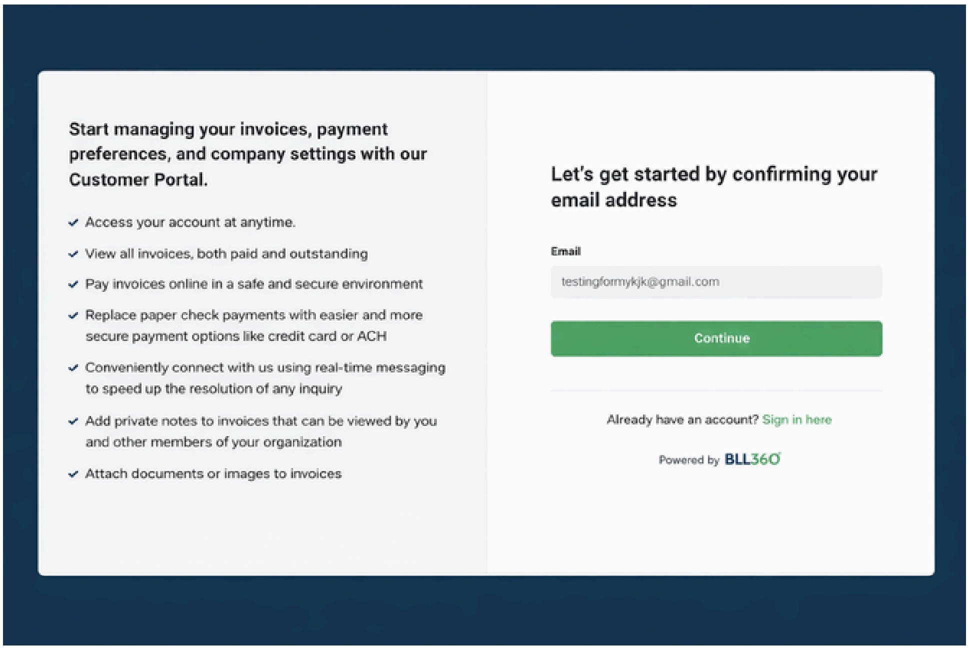
# Logging Into Bill360

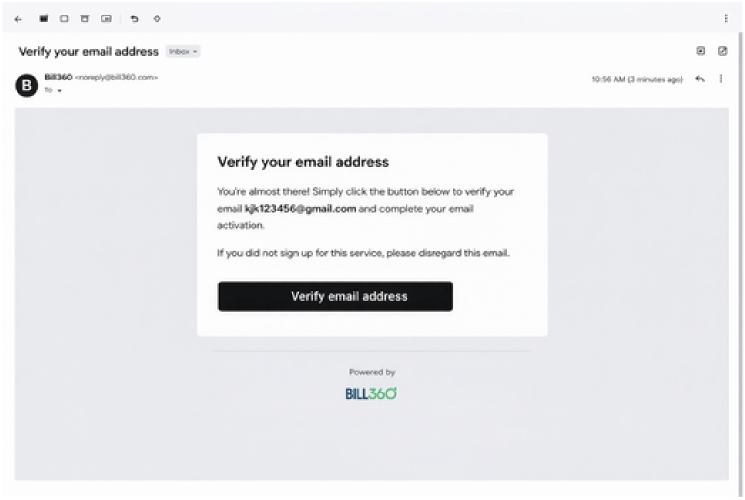
After you have received your first Invoice, select "Access Portal".



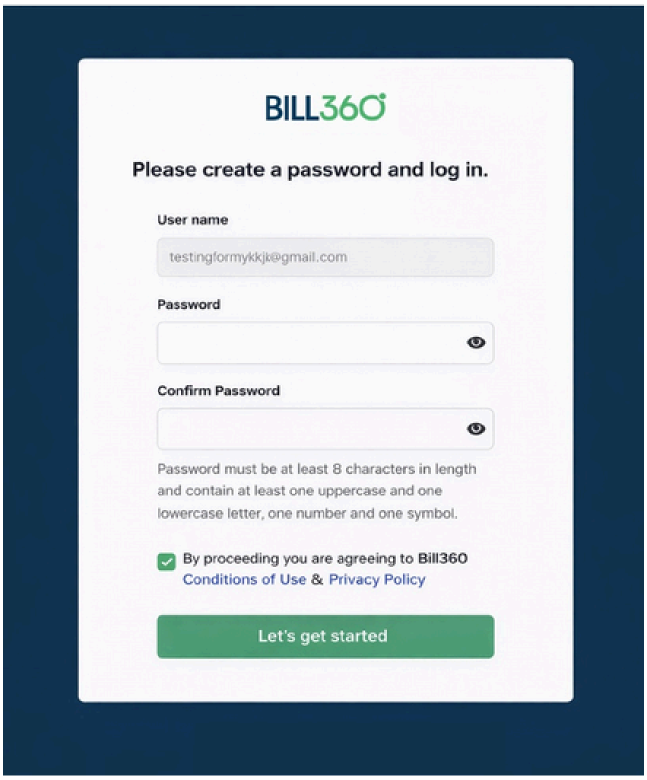

Once you click access portal, please verify your email is correct.



## 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



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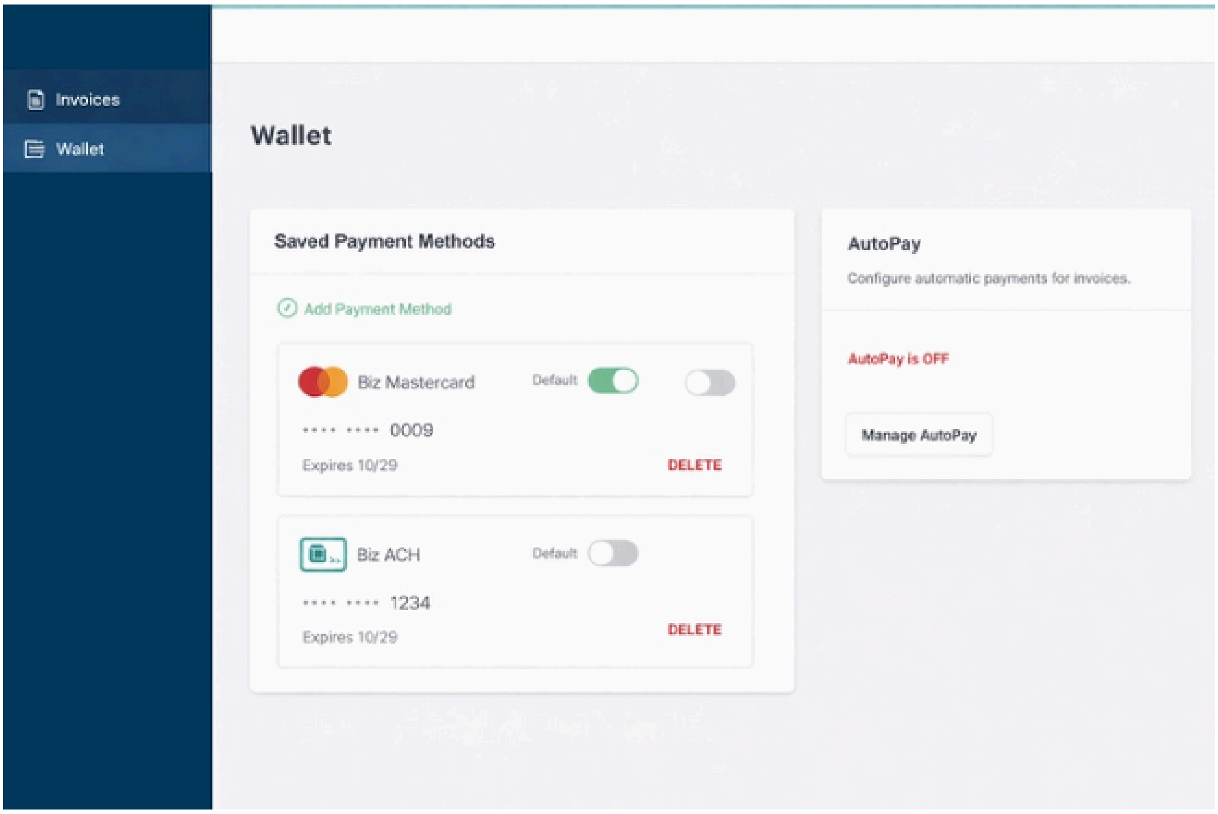
# Customer Wallet

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.

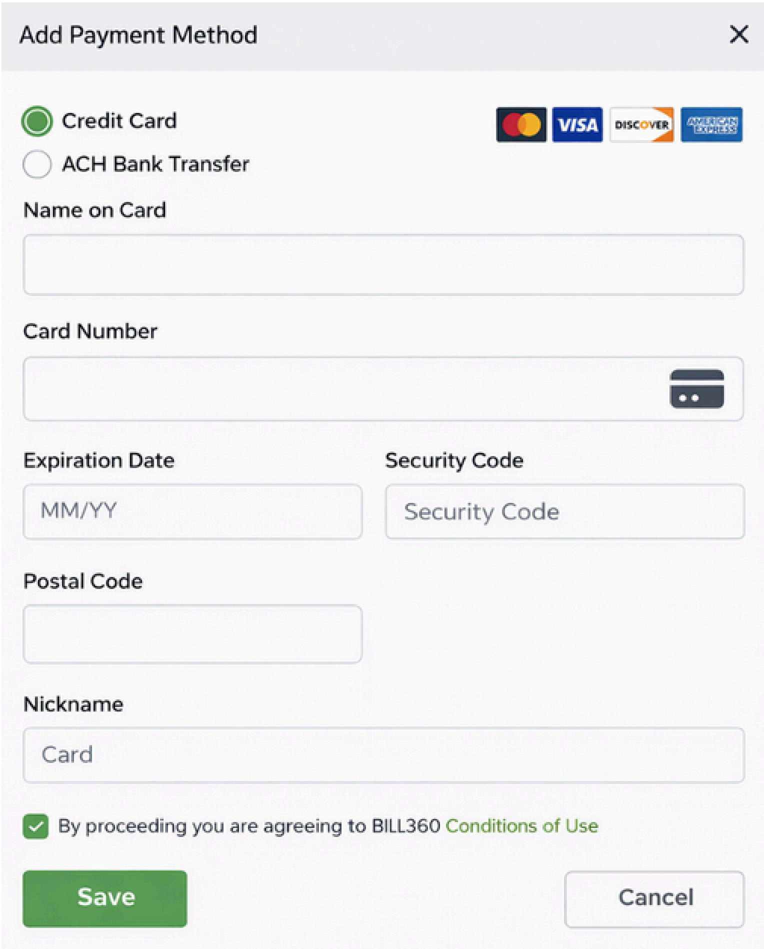


## Add a Payment Method

To add a payment method, complete the following steps:

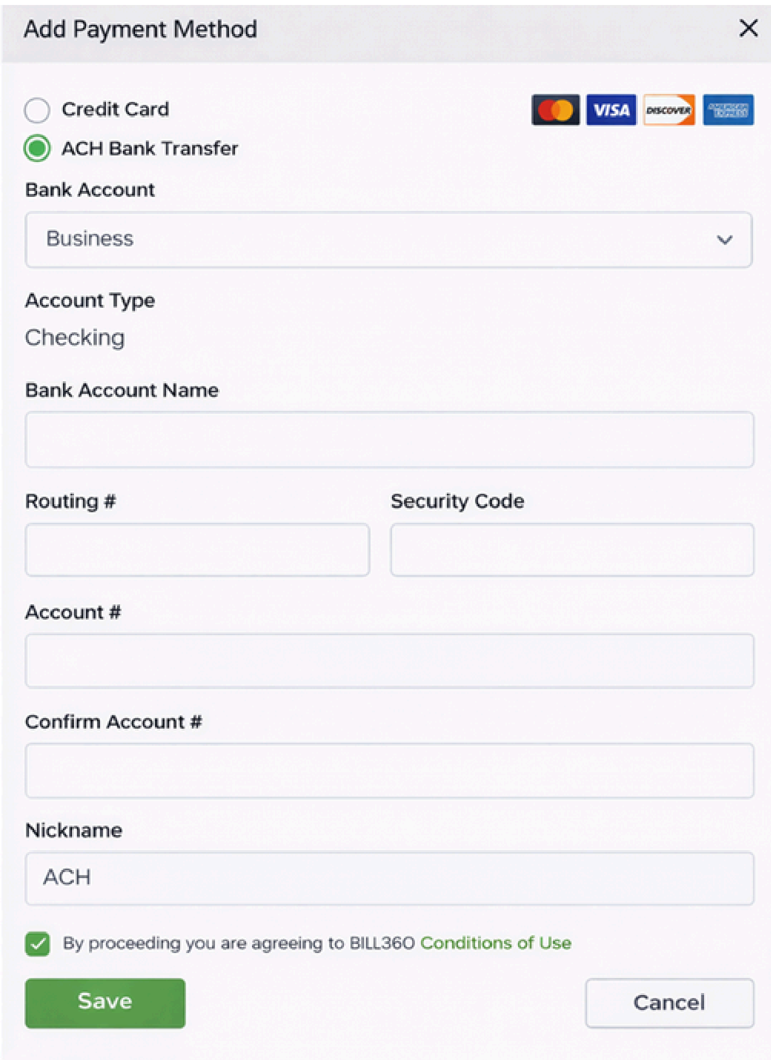
1. From the Payment Options tab, click **Add Payment Method.**
2. The Add Payment Method window opens. Select the radio button for either credit card or ACH Bank Transfer.
3. For credit cards, enter the card information in the following fields.
   - Name on Card
   - Card Number
   - Expiration Date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

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

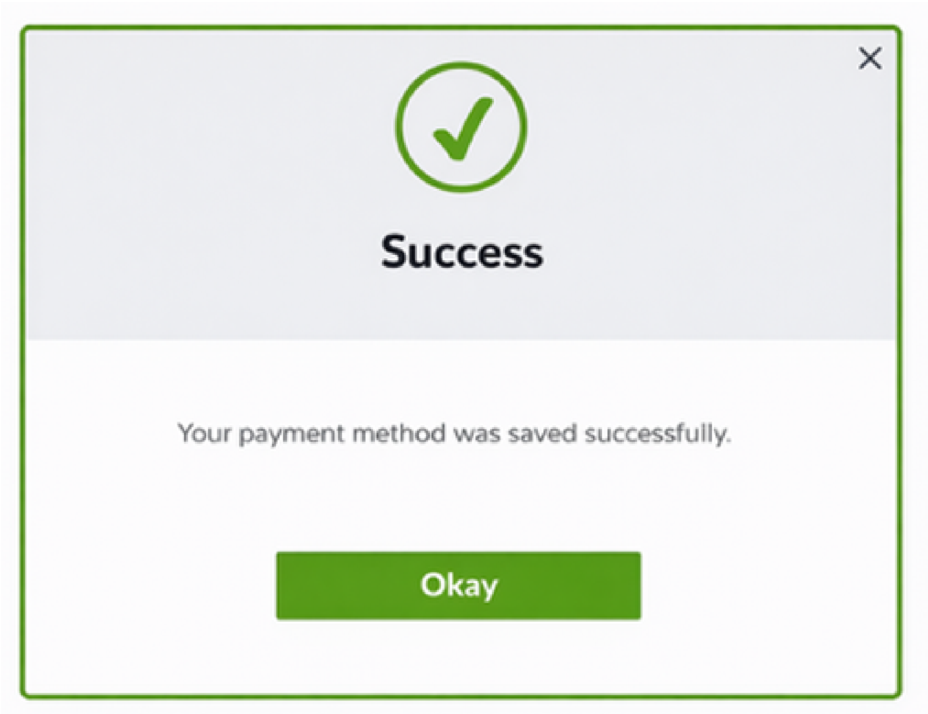


4. For ACH Bank Transfer, enter the bank account information in the following fields:
   - Bank Account drop-down, select Business or Personal
   - Bank Account Name - The name on the account
   - Routing #
   - Account #
   - Confirm Account #
   - Nickname

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



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



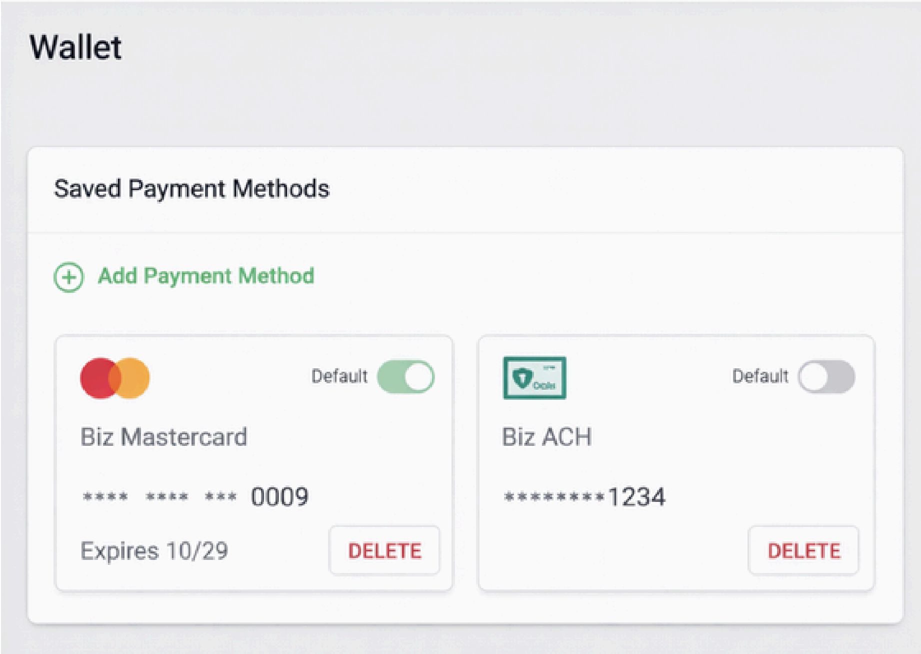

**Note:** The first wallet item becomes the default payment method. You can change the default option should there be more than one payment method.

## Delete a Payment Method

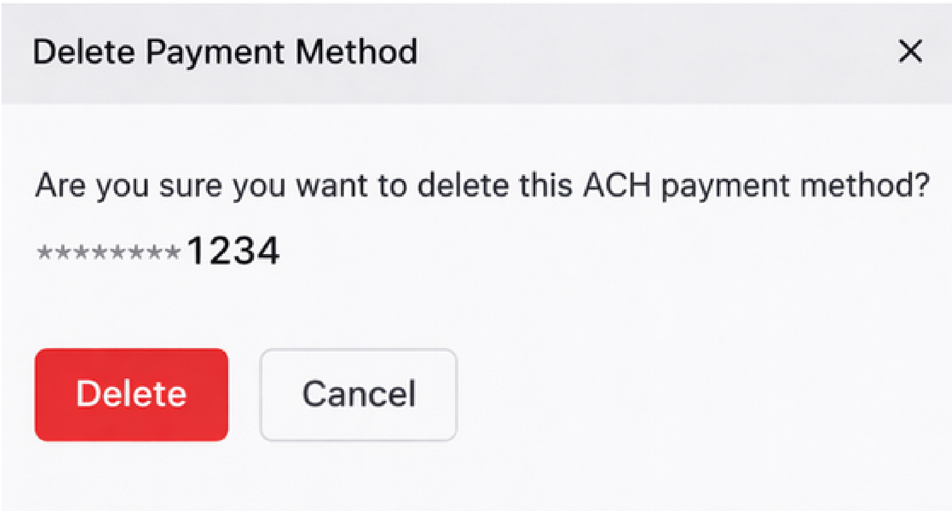
To delete a payment method, complete the following steps:

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.

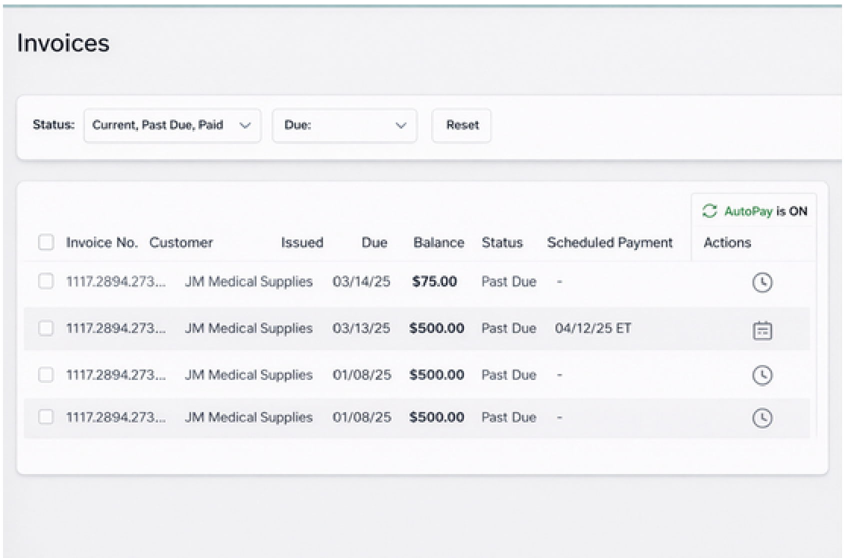


# AutoPay

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.

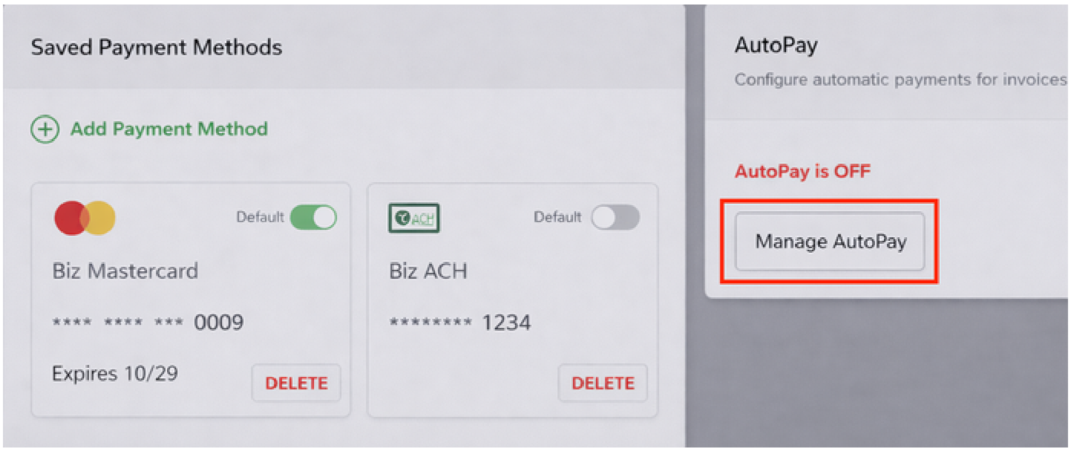
Autopay will keep trying to process invoices up to 5 days past the due date. This prevents missed payments when invoices are issued very close to their due date and ensures eligible invoices are still collected within a short tolerance window.



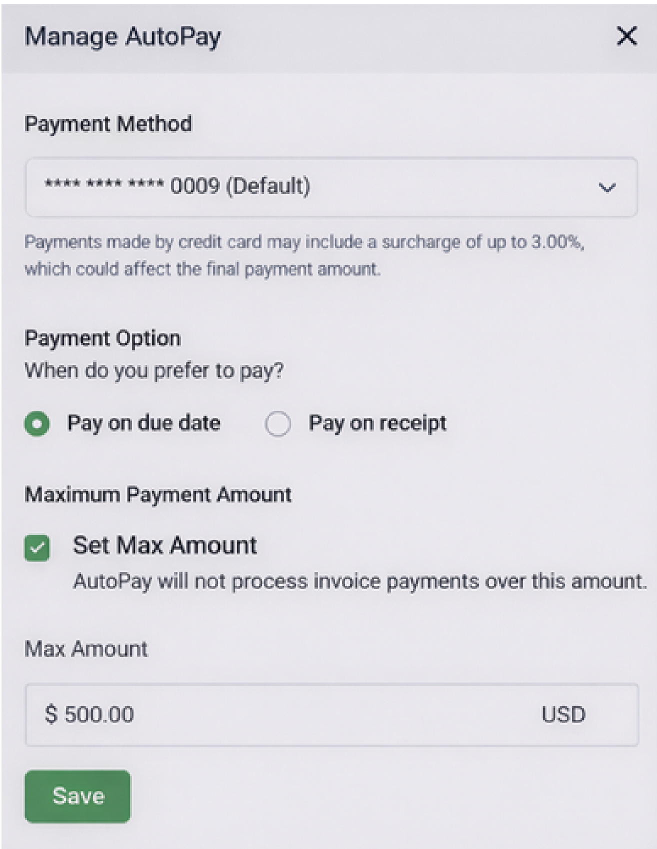

### Set-Up AutoPay

Complete the following steps to set-up AutoPay:

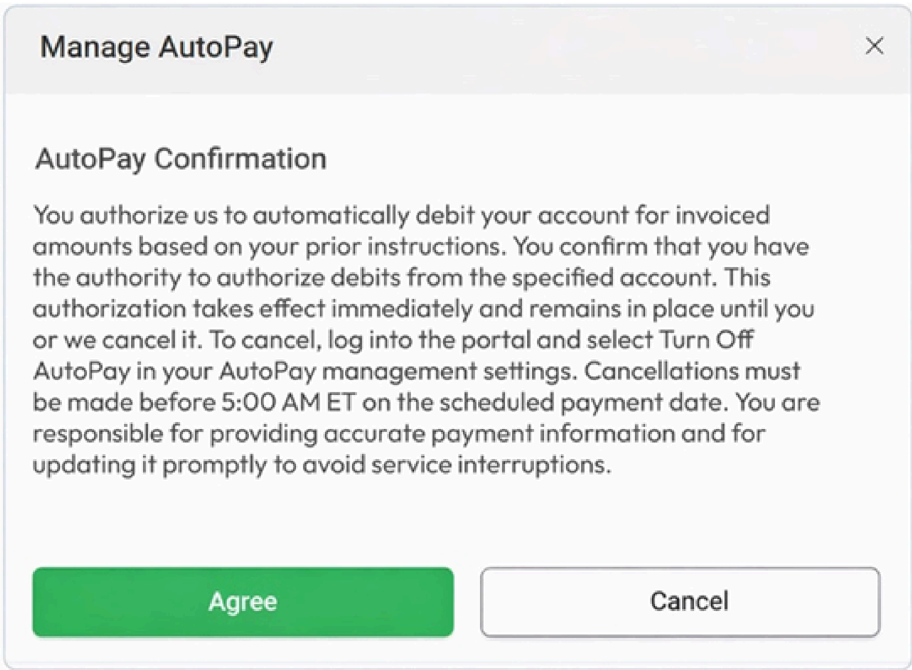
1. From the Settings page, click **Payment Options.**
2. Under AutoPay, click **Manage AutoPay.**




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.**

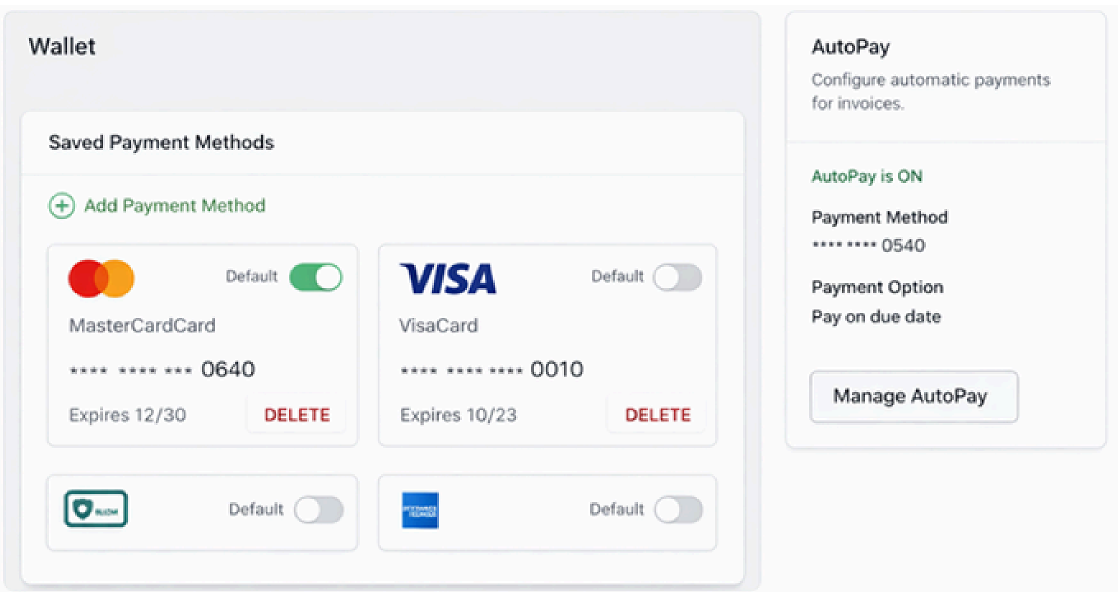


8. The AutoPay Confirmation window opens. Read the confirmation message and then click **Agree** to return to the Payment Options page.

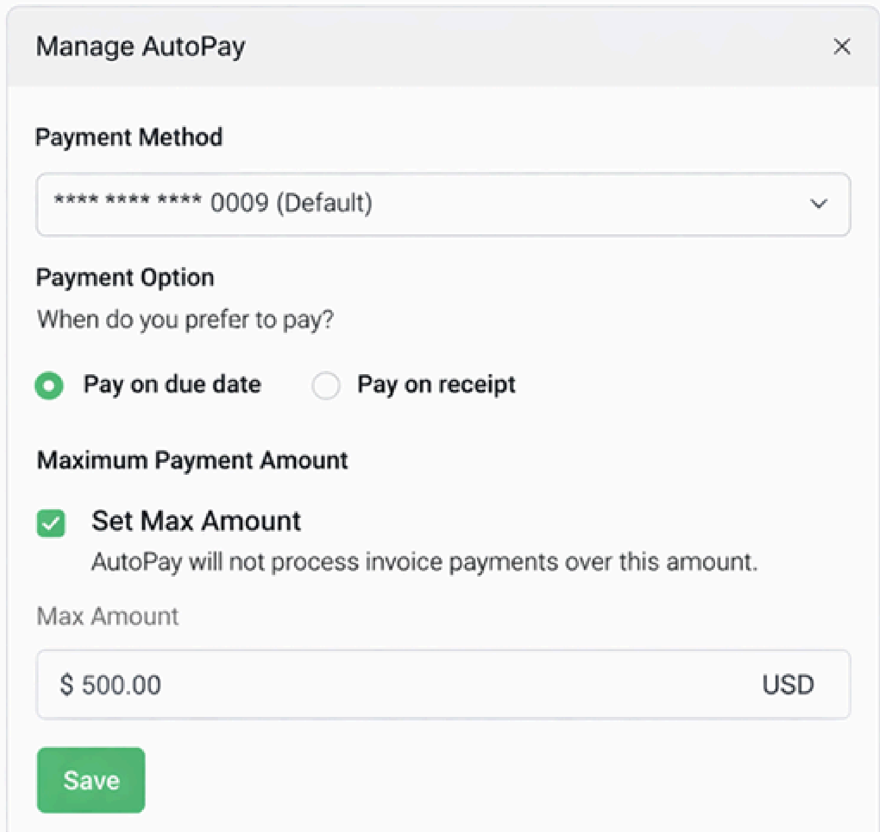



## Edit AutoPay

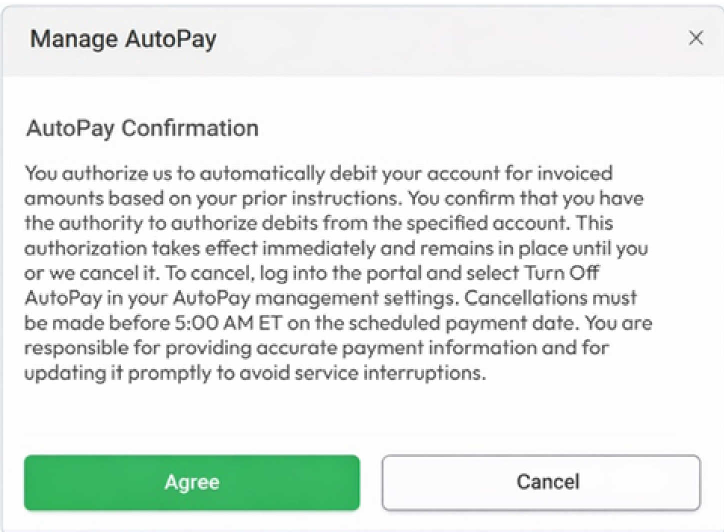
1. From the Setting page, click **Payment Options.**
2. Under AutoPay, click **Manage AutoPay.**



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



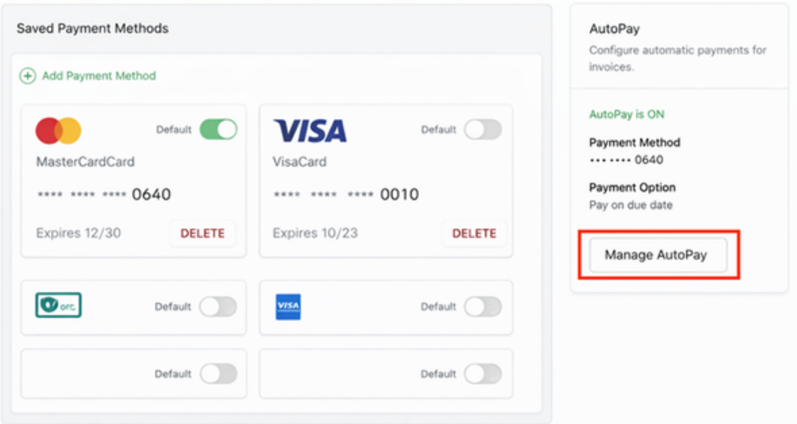

4. The AutoPay Confirmation window opens. Read the confirmation message and then click **Agree** to return to the Payment Options page.



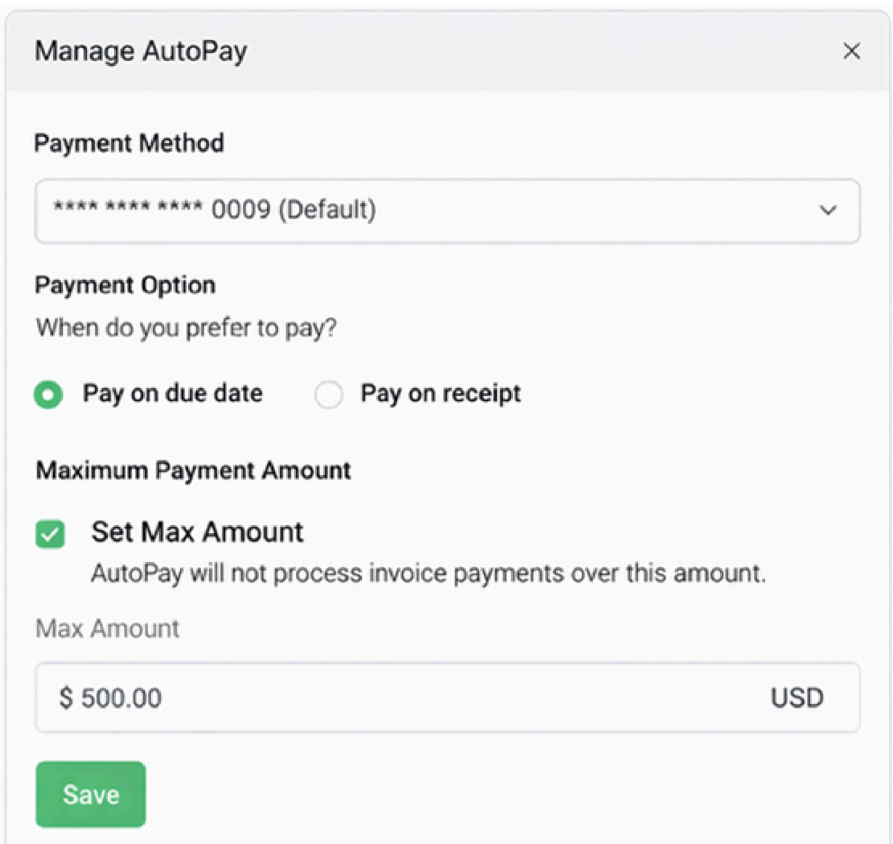
## Turn Off AutoPay

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.**



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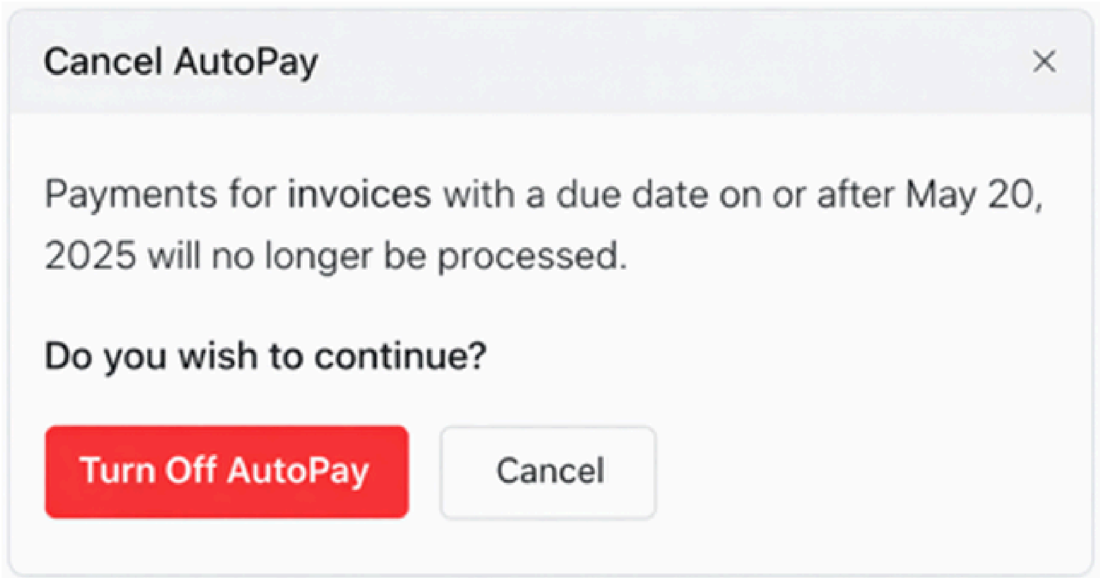
4. The Cancel AutoPay window opens. Click **Turn Off AutoPay** and return to the Payment Options page.

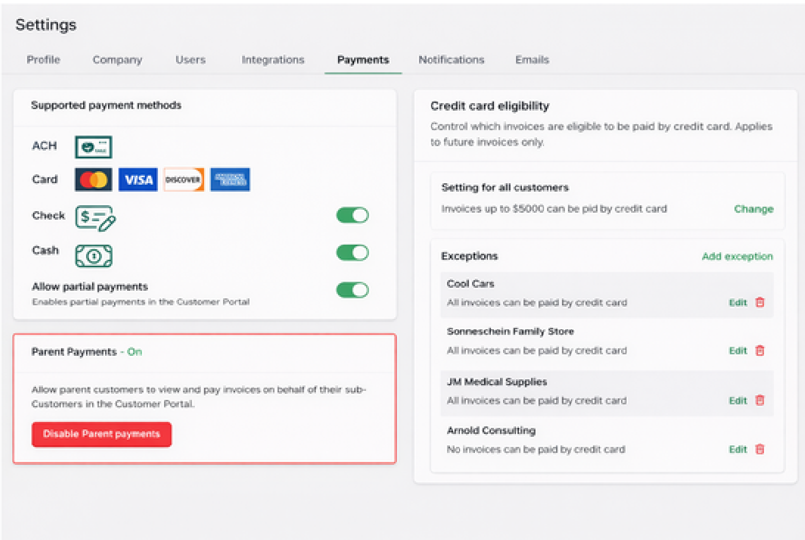


# ParentPay Overview

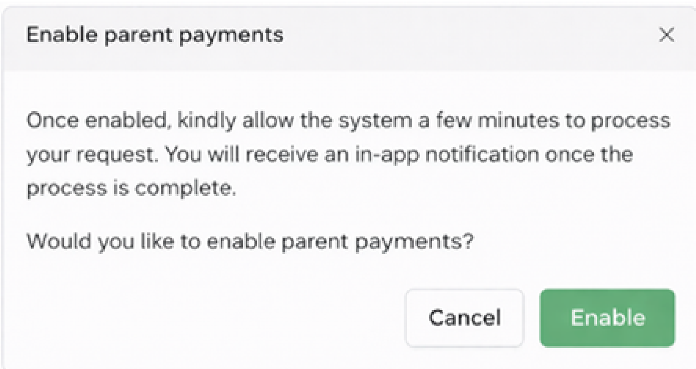
ParentPay allows companies that utilize hierarchical customer structures to manage invoices and payments more efficiently by enabling the parent customer to view and settle all associated sub-customer invoices through a single portal, significantly simplifying the user experience and reducing the administrative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

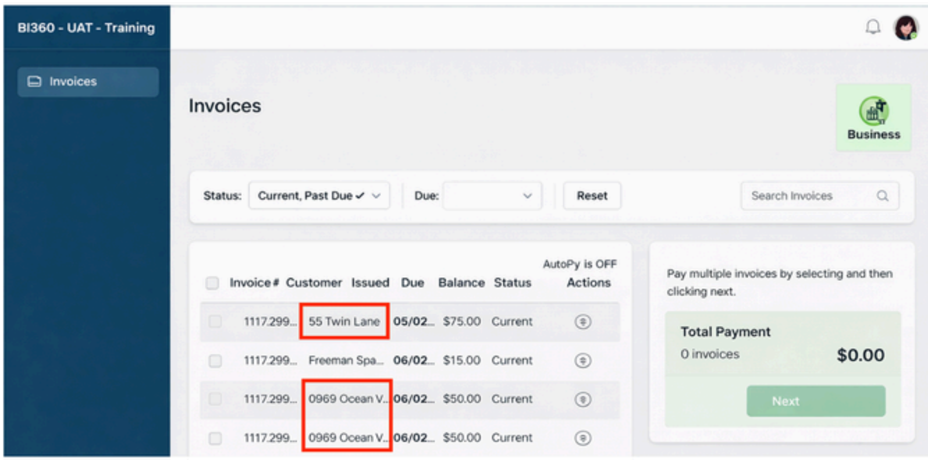



The Enable parent payments window opens, click Enable. Once confirmation, parent customers can view and pay invoices on behalf of their sub-customers directly from their customer portal.



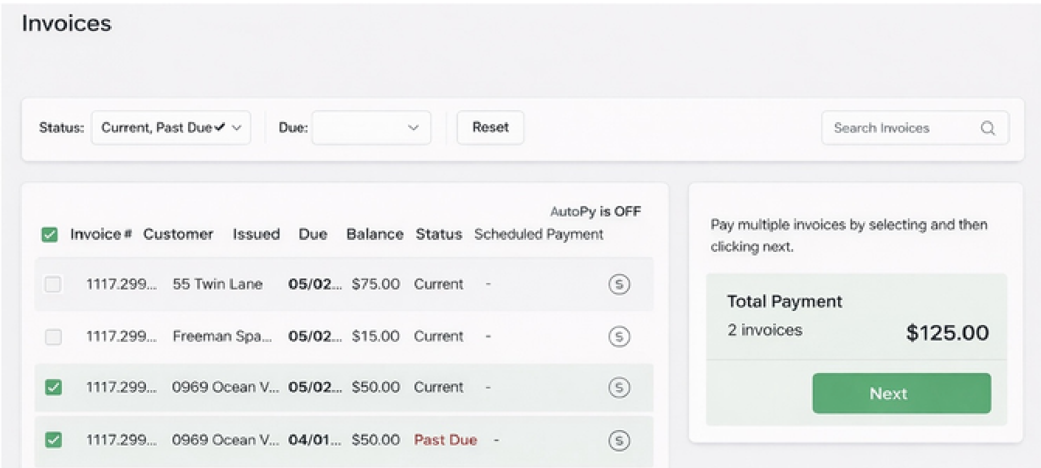
# Parent Customer Portal - Invoice List View

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.

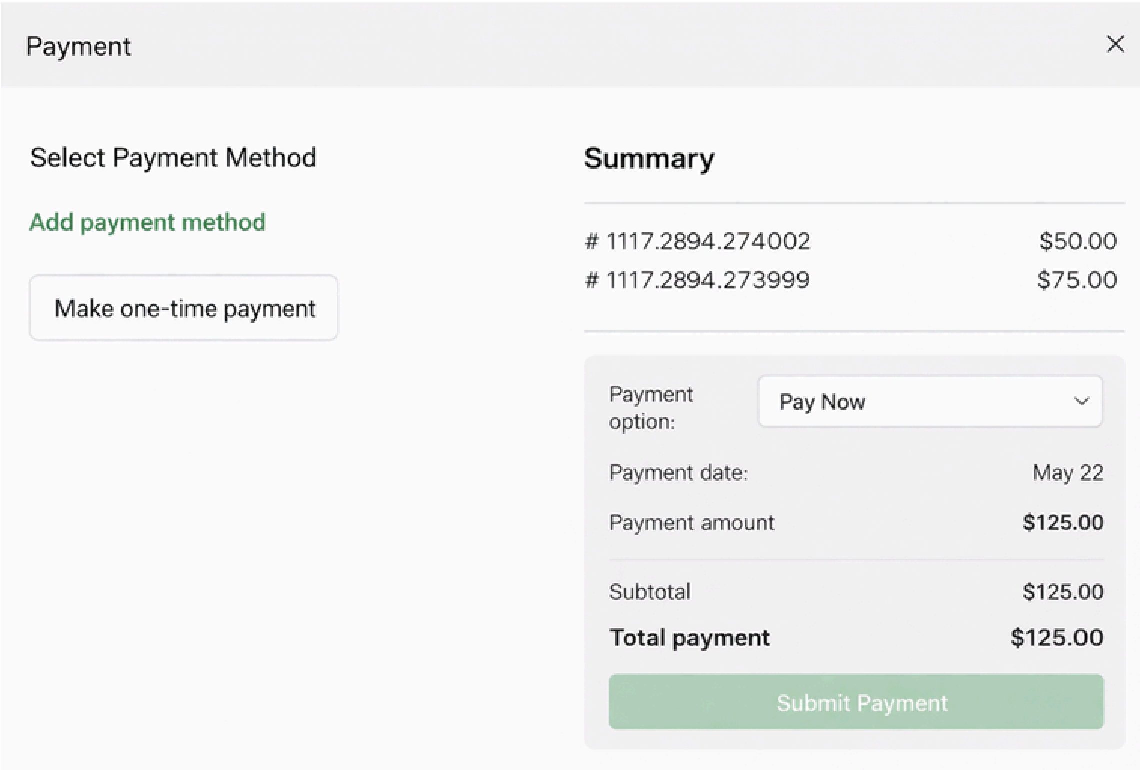



Next, the parent customer user will navigate to the **Select Payment Method.** User can use a saved payment method, add a new payment method, or make a one-time payment.

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.




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