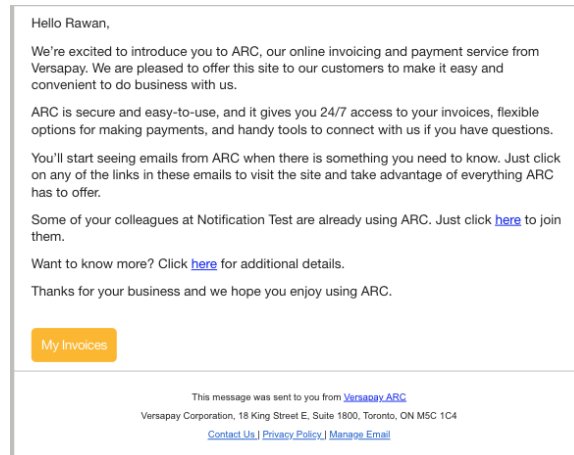


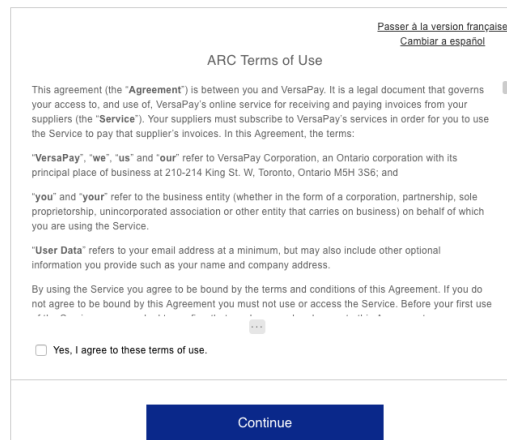
# Versapay Customer Portal Guide

## Getting Started

Welcome to Versapay! Our choice for cloud-based invoice presentment and payment solutions. You will receive an invitation from Versapay to create a user account to our new online invoice and payment solution.



Clicking the 'My Invoices' button will direct you to a Terms and Conditions page, where you will need to agree to and continue to view and pay your invoices online.



Note: In addition to the initial invite, you will also receive pertinent email notifications for new invoices with links to view and pay your invoices as applicable. Feel free to use those links as well to access your account.

You can view your invoices as an express user which has a similar concept to “guest checkout” where you do not have to create an account and see the green bar every time you visit the platform until you create an account.

The screenshot shows the 'Invoices' section of the Versapay interface. At the top, there are navigation tabs for 'Invoices', 'Payments', and 'Activities'. To the right, there are links for 'Send a Comment', 'Make A Prepayment', and 'Sign Up for AutoPay'. A prominent green notification bar states: 'You can pay invoices and more when you add a password. [Add your password now.](#)' Below this, there is a search bar for 'Invoice # or PO #' and a magnifying glass icon. A row of buttons includes 'Open Items', 'What should I pay?', 'Scheduled Payments', and 'More'. Underneath, there are filters for 'Dates:' with options for 'All', 'Invoice Date', and 'Due Date'. On the right side, there are buttons for 'Pay All', 'Export', and a dropdown arrow.

You can click the “Add your password now” to create an account and sign up.

The screenshot shows the 'Add a password' form. On the left, a message reads: 'You need to add a password to add a payment method, make a prepayment, or set up Autopay'. Below this, it says 'Adding a password is a great idea. It's quick and easy, and lets you:' followed by three bullet points: 'Securely store and re-use payment info', 'Invite your colleagues to join you', and 'Take advantage of automatic payment options and other handy time-saving tools'. The form itself has two input fields: 'Password' and 'Repeat Password', followed by 'Continue' and 'Return to Invoices' buttons. A callout box on the right lists the password requirements: 'At least 8 characters', 'At least 1 lowercase letter', 'At least 1 uppercase letter', and 'At least 1 number'.

## Viewing Your Invoices

The screenshot shows the 'Viewing Your Invoices' interface. At the top right, a grey status bar displays 'Balance Due: \$10.06' (callout 1). Below this are navigation tabs for 'Invoices', 'Payments', and 'Activities' (callout 2). A search field for 'Invoice # or PO #' is located below the tabs (callout 3). A row of status filter buttons includes 'Open Items', 'What should I pay?', 'Scheduled Payments', and 'More' (callout 4). On the right side, there are 'Pay All' and 'Export' buttons (callout 5). Below the filters, a row of action buttons includes 'Pay', 'Mark for Payment', and 'PDF' (callout 6). The main content is a table with columns: Invoice #, PO #, Amount, Status, Invoice Date, Due, and Balance. The first row shows an invoice with ID 180847, amount \$0.01, status OVERDUE, and due date 11-29-2018 (callout 8). A checkbox next to the invoice ID is highlighted (callout 7).

1. **Status Bar:** Indicates your total balance due, your last login date and your last payment amount
2. **Navigation Tabs:** Allow you to navigate to various views of your account data
3. **Search Field:** You can search for records by Invoice Number, or PO Number
4. **Status Filters:** These buttons allow you to filter which invoices are displayed based on status. Only one filter per set can be selected at a time, e.g. Open and All. There's also a filter called "What Should I Pay?" which will display invoices within five days of the upcoming due date or any that are past due.
5. **Pay All and Export:** You can choose to pay all invoices or to export all the invoices in your list to .csv file by clicking these buttons.
6. **Invoice Options:** When you have selected an invoice using the Invoice Selection Checkbox these options will become available. You can choose to pay the invoice(s) selected, mark them for future payment, or open PDF copies of the invoices on your desktop.
7. **Invoice Selection Checkbox:** You can flag this checkbox to select any given invoice for payment.
8. **Presented Invoice Link:** Click on the invoice link and it will open the invoice for you to view. The invoice will open, and you will be able to see the invoice details, payments, attachments and any comments related to the invoice.

## Making a Payment

You can also click on the invoice number to review the invoice you would like to pay and click the "Pay Now" button on the invoice view to make a payment.

**Invoices** Payments Activities Send a Comment Sign Up for AutoPay

#180847 Balance: \$0.01

Pay Now
View PDF

Amount	Invoice Date	Due Date	Status
\$0.01	11/01/2018	11/29/2018	Overdue

**INVOICE**

<b>Date</b>	<b>Invoice #</b>
11/01/2018	180847
<b>Due Date</b>	<b>Terms</b>
11/29/2018	
<b>Bill To:</b>	

Without adding a password you would be prompted to enter your payment method (either credit card or bank account information) and can make a one-time payment without needing to save your bank payment information.

You are about to pay 1 invoice

--- Total Charge ---

**\$2,163.00**

[More Details](#)

**Choose your payment method:**

**VISA**  
 **Bank Account**

**Payment Method Information**

Flip your card over and look at the signature box. You should see either the entire 16-digit credit card number or just the last four digits, followed by a special 3-digit code. This 3-digit code is your Card Verification Value.  
   
 Expires:

Clicking Confirm Payment will authorize VersaPay to make a one-time payment from your account.

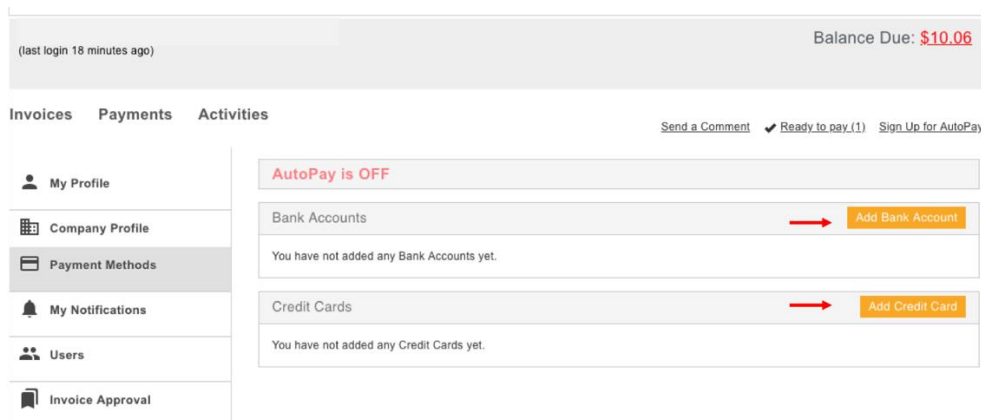
Confirm Payment

## Payment Methods

When you add a password, you can add the funding source you wish to use when paying invoices by opening your account settings and going into the "Payment Methods" section.



Accepted payment methods will vary based on the supplier, so you will only be able to add the type of payment method the given supplier accepts. If you wish to add a bank account and that is an option offered, click to "Add Bank Account" button. Similarly, if credit card is an accepted payment method, click the "Add Credit Card" button. You'll be taken to a page to enter the funding source, simply complete this page and save the funding source.



## Communication Tool

If you want to communicate with a member on the AR team, you can select the invoice you are inquiring about and choose to open a comment or a dispute as seen below.

Recent Activity New Comment/Open Dispute

---

Invoice published June 13

Once you click on “New Comment/Open Dispute”, you will be able to see the below options.

Recent Activity New Comment/Open Dispute

---

Leave a comment

Attach File  → **1**

→ **2**

Open dispute ← **3**

Cancel Comment

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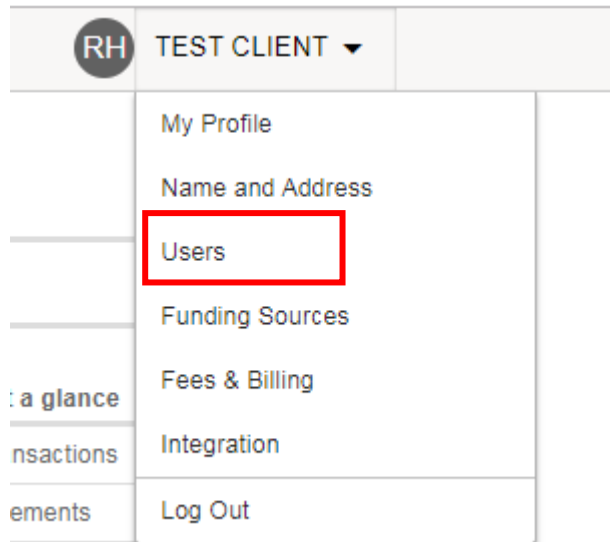
Invoice published June 13

- 1.** You can attach a file or a picture that is relevant to your comment/question
- 2.** You are able to tag specific people you want to be notified with your question
- 3.** You are able to distinguish between a comment and a dispute by checking this box. Disputes are generally created when you are requesting that you do not pay the invoice in question for whatever reason you provide. Comments are chosen when you have questions/requests or would like to inform an AR member with any additional information.

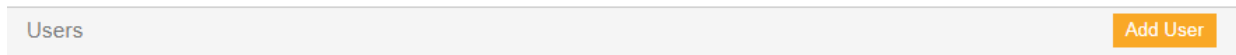
## Adding and Removing Users (For Admin Users only)

Initially, only the primary billing email address on file will be set up with an ARC Account. That individual will be set up as an admin on the account and will be able to add other users if desired. Once registration has been completed, users can be added as follows.

1. Log in to your account and navigate to Users available on the top right menu



2. Select Add User




3. Enter email and role type:

Users

Email:

Role:  **Admin** - Full access to this account; can invite and manage users.  
 **User** - Full access to this account except user management  
 **Read-Only** - View invoices and payments.

The user will be sent an email welcoming them to ARC and should follow the instructions in the first section of this document. Users access can be changed or removed by an admin on the account by clicking on change on the user screen.

(User) 


Change

19

Access can be changed for the user or can be completely removed which should be done for any users who no longer work with the customer as soon as possible.

Users



hchengarc+rxbcust4@gmail.com (Admin) 

Last Login on: 10-30-2019

- Admin** - Full access to this account; can invite and manage users.
- User** - Full access to this account except user management
- Read-Only** - View invoices and payments.

Update

Remove Access

Cancel



## Managing Multiple Customer Accounts

If you manage multiple customer accounts, you will be able to toggle between each customer's account. When initially logging in, you will be prompted with a second screen since your email address belongs to another account. It may look like one of the two notifications listed below.

- Click Yes if you want to share your payment methods, then click continue
- Click No if you want to keep your payment methods separate, then click continue

Welcome back Rebecca! We see you're already using ARC for TEST CLIENT. Do you want to manage invoices for Company A together with TEST CLIENT?

Yes, group with TEST CLIENT (C-00002)
   
 No, keep them separate

[Continue](#)

**Great News!**

It looks like Company A is related to other companies that do business with. If you want to manage invoices for any of those companies too, please select them below. If you do not select any of them, you will be presented with invoices for Company A only.

Company A-Location 0100 (C-01726)
  TPA, Inc. (C-01724)

[Continue](#)

If you would like to view these companies together, you must check all companies that apply. If you select to view all together you can view all at once or filter as needed.

TEST CLIENT (C-00002) ▾

Select Customers to View  [Apply](#)

[Select All](#) [Unselect All](#)

- TEST CLIENT (C-00002)
- TPA, Inc. (C-01724)
- Company A (C-01725)
- Company A-Location 0100 (C-01726)
- Company A- Location 0200 (C-01727)

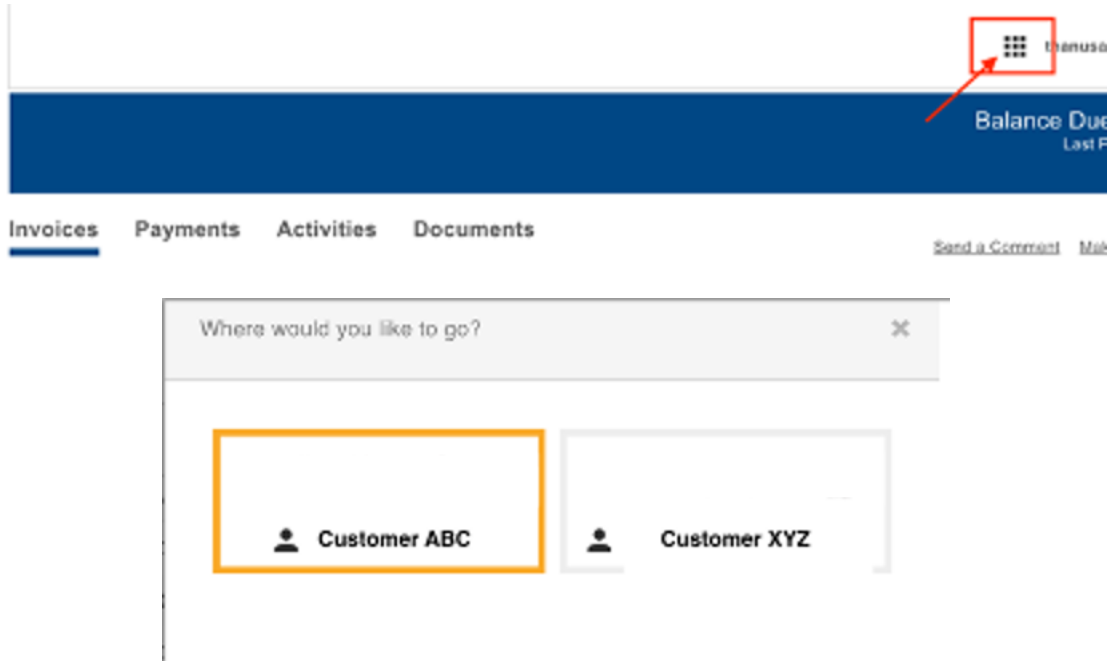
<input type="checkbox"/>	Invoice #	PO #	Customer #	Customer	Amount	Status	Invoice
<input type="checkbox"/>	ARDM-00675		C-00002	TEST CLIENT	\$0.01	OVERDUE	04-17-20

15 invo  
6 credits, (

Choosing this option will not allow you to use separated payment types. If different payment types are needed for each account, you would select NOT to group together. Grouping together will also combine

notifications (example: you would receive one email with all your customers' balances) thus making it ideal unless different payment types are needed.

If you choose not to group together, you would toggle between by selecting the menu on the top right of the screen



### Important Note on Grouped Accounts

Please note that inviting additional users to an account that is already grouped allows the newly added user to view invoices across all grouped accounts. Similarly, newly added users can view and use the shared payment methods across all the accounts in that group to pay any invoice. For further clarity, imagine that:

- Person A groups Company A, B, and C (all of which pay invoices to the same supplier), and
- Person A then invites Person B to Company A

In the above scenario, when Person B accepts the invite and signs into ARC, Person B will have access to Companies A, B, and C since they are already grouped.

Customer accounts should NOT be grouped if additional contacts will be added to individual companies and such contacts should not be able to view all groupings. If previously grouped accounts need to be separated, please reach out to your supplier directly for assistance.

## About Versapay

### What is ARC?

VersaPay's ARC is an accounts receivable cloud application used by your service provider or supplier. As their customer, they have invited you to use the platform to view and pay your invoices.

### Why Should I Sign Up?

By signing into your customer portal, you'll have access to all of your invoices. You will be able to check your account statement, print your invoices and make payments safely and securely.

### Is It Secure?

VersaPay has passed the most rigorous of security testing from external auditors to verify our security level meets the highest industry standards. Our systems are monitored and updated as needed to protect against any known security risks. In addition to the third-party testing, our internal security personnel use several risk assessment and security tools to monitor and maintain the security of our online systems. VersaPay is a certified PCI Level 1 Service Provider and is audited annually by its banking partners to ensure 'bank grade' security compliance.

### What Does This Mean?

It means we have passed the most rigorous of security testing from external auditors to verify our security level meets the highest industry standards.

All interaction with our service is done using the latest levels of SSL encryption (TLS), our systems are housed in a SSAE16 certified facility, meeting the highest standards in security and availability.

Our compliance, internal practices, data centers, and security monitoring is best-in-class to ensure your customer and financial information is protected in a secure environment. We're certified as compliant under PCI DSS version 3.2 at Service Provider Level 1, and complete an annual PCI DSS assessment using an approved Qualified Security Assessor.

### Time Out

VersaPay maintains a time out feature that will automatically log you off of the current session after a period of inactivity. This helps reduce unauthorized access to your accounts.

### Physical Security

Our services are hosted in top-tier data centers that provide carrier-level support, as well as multiple levels of security and redundancy.

### Secure Login