

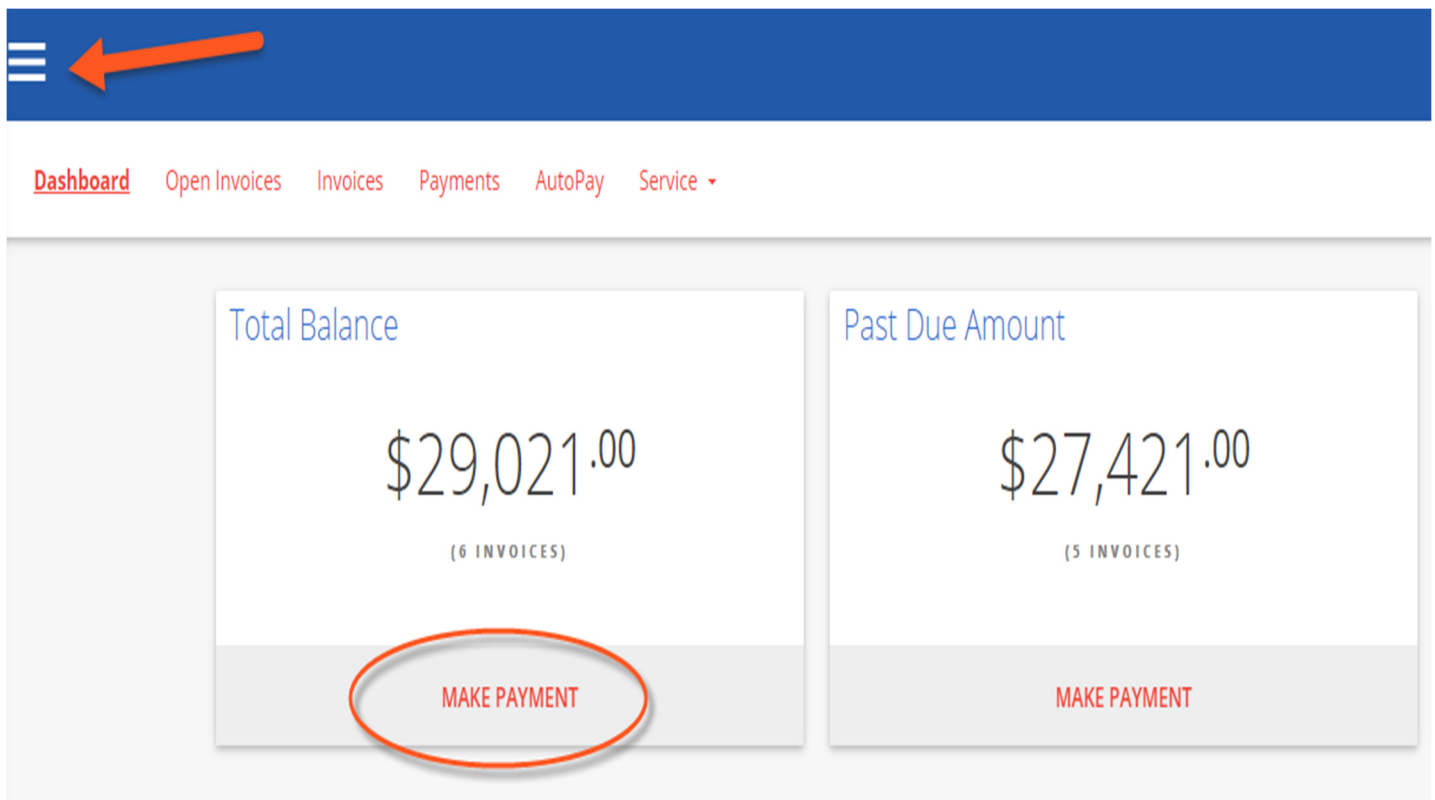
# PORTAL INTRODUCTION

## A QUICK “HOW TO” GUIDE

### 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.



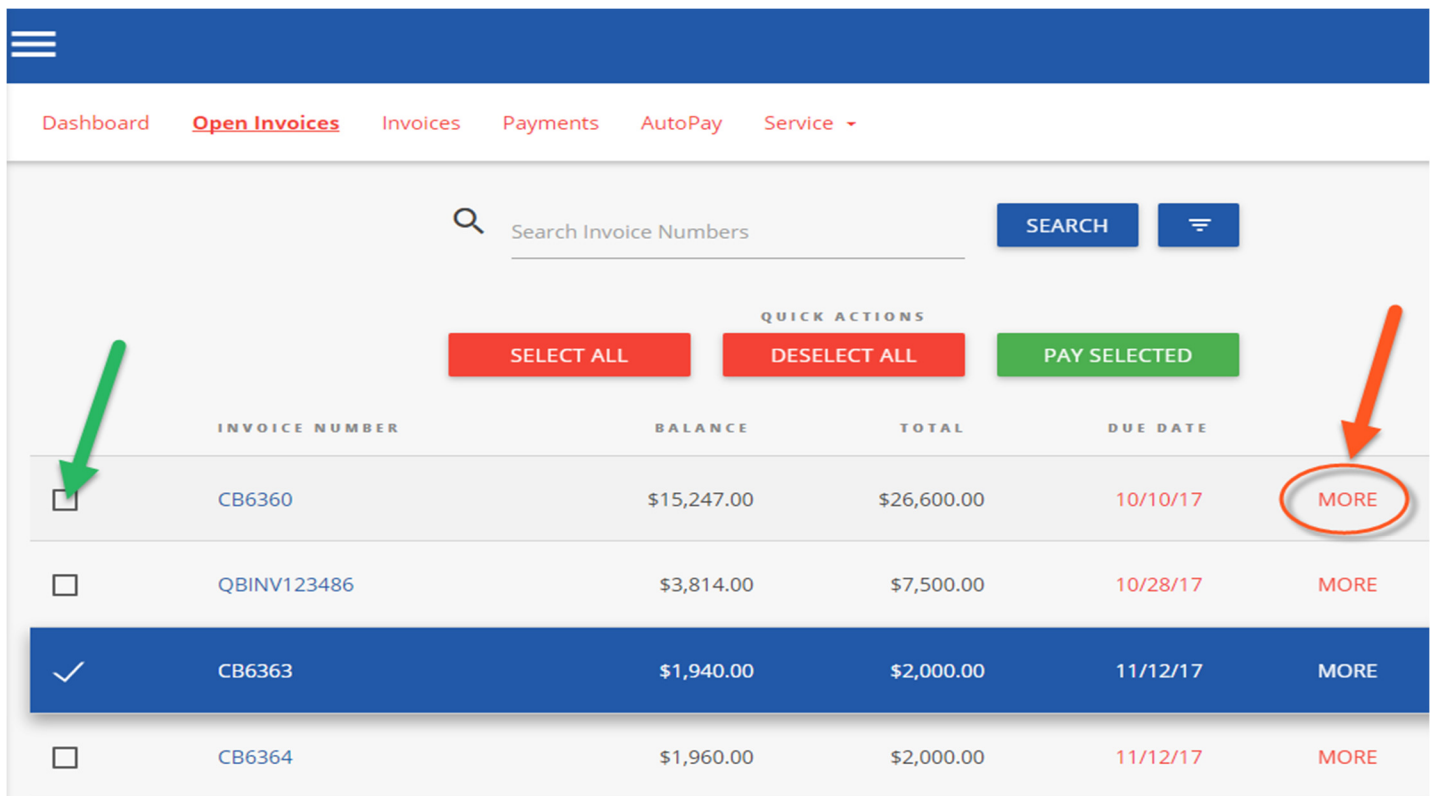
# PORTAL INTRODUCTION

## A QUICK "HOW TO" GUIDE

### 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".



<div> <div></div> <div>Dashboard</div> <div>Open Invoices</div> <div>Invoices</div> <div>Payments</div> <div>AutoPay</div> <div>Service</div> </div>					
<div> <div>Search Invoice Numbers</div> <div>SEARCH</div> <div></div> </div>					
<div> <div>SELECT ALL</div> <div>DESELECT ALL</div> <div>PAY SELECTED</div> </div>					
	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

# PORTAL INTRODUCTION

## A QUICK “HOW TO” GUIDE

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#** --

**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**

# PORTAL INTRODUCTION

## A QUICK “HOW TO” GUIDE

### To Process a payment:

- Select the checkbox of one (or multiple) invoice(s). Click “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.

PAY SELECTED

Details | Summary | Confirmation

Wallet

ABC Mercantile | 3123

DISCOVER

Scott's Max Limit Card | 1640

VISA

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

# PORTAL INTRODUCTION

## A QUICK “HOW TO” GUIDE

### 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
3	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.

# PORTAL INTRODUCTION


## A QUICK “HOW TO” GUIDE

Details | Summary | Confirmation X

  
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.

CANCEL BACK CONFIRM

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.

# PORTAL INTRODUCTION

## A QUICK “HOW TO” GUIDE

- 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-ACMYS6FORA13

Receipt Sent To:

Add Email Receipt  
demo@example.com

SEND

CLOSE

**POLICY NUMBER:** MOC-FORM-0019  
**POLICY CATEGORY:** CONNECT BOOSTER  
**INITIATION DATE:** 01/01/2018  
**APPROVED BY:** SENIOR MANAGEMENT TEAM  
**REVISION NUMBER:** R12-20  
**REVISION DATE:** 12/01/2020

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# PORTAL INTRODUCTION

## A QUICK "HOW TO" GUIDE

### 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

Q

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

**POLICY NUMBER:** MOC-FORM-0019

**POLICY CATEGORY:** CONNECT BOOSTER

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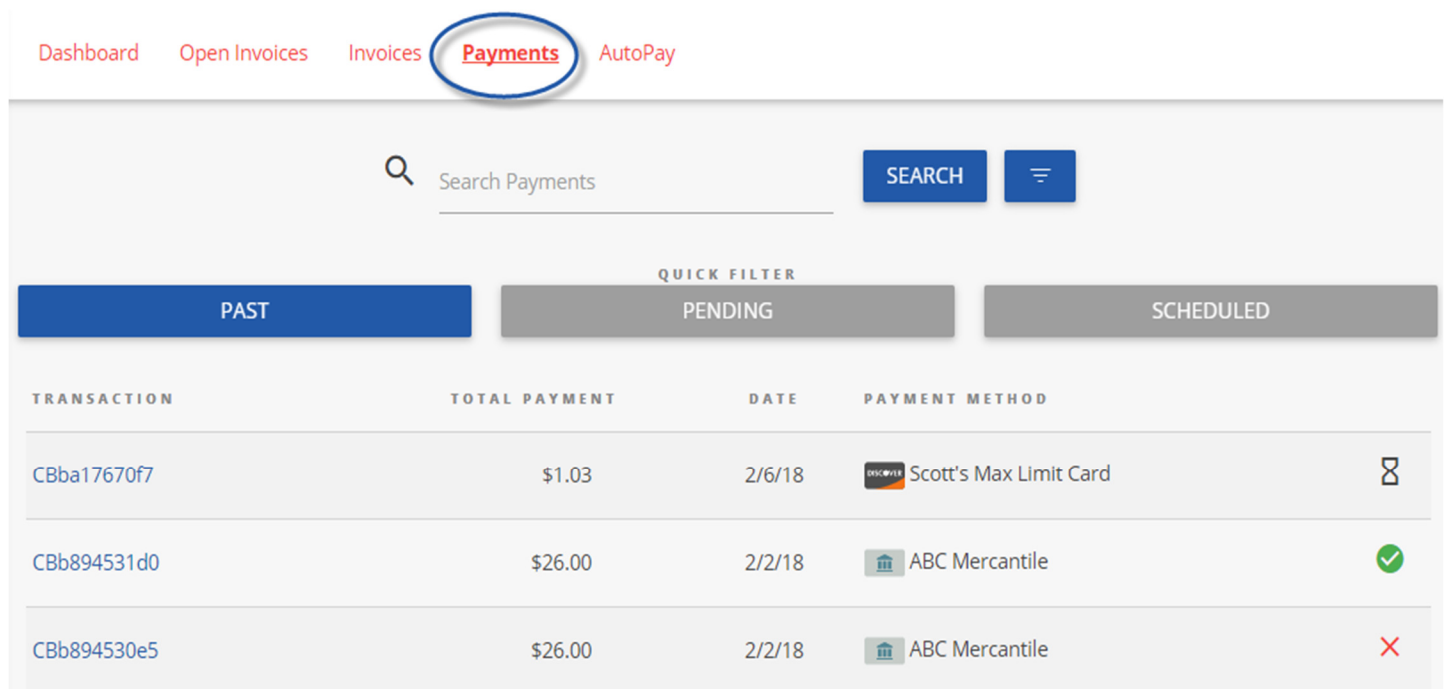
# PORTAL INTRODUCTION









## A QUICK “HOW TO” GUIDE

### Payments

Click on the PAYMENTS menu option:

- View all currently pending, future scheduled (including AutoPay) or past historic payments



Dashboard	Open Invoices	Invoices	<b>Payments</b>	AutoPay
 Search Payments		<b>SEARCH</b> 		
QUICK FILTER				
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	

# PORTAL INTRODUCTION

## A QUICK “HOW TO” GUIDE

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### 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!

# PORTAL INTRODUCTION

## A QUICK “HOW TO” GUIDE

Dashboard Open Invoices Invoices Payments **AutoPay**

(DRAG TO REORDER)

AutoPay when Invoice Contract Is any of the following Platinum Managed Plan (\$2,750.00)

1 Payment Methods Wild Eagle Checking 2 Run AutoPay On Due Date

3 Autopay Type Contract Matches Any 4 Contract Platinum Managed Plan (\$2,750.00)

ADVANCED DELETE UNDO CHANGES

AutoPay when Invoice Amount Is less than 1000.00

\*By saving, you are authorizing all of the above payments according to their criterion.

NEW CANCEL SAVE 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!

# PORTAL INTRODUCTION

## A QUICK “HOW TO” GUIDE

### 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 myODIE.com portal interface. At the top, there is a blue navigation bar with a hamburger menu icon on the left and a list of menu items: Dashboard, Open Invoices, Invoices, Payments, AutoPay, and Service. An orange arrow points to the Service menu item. Below the navigation bar, there 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, there is a section titled "QUICK FILTERS" 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, there is a table with the following columns: TICKET #, SUMMARY, STATUS, CREATED DATE, and CLOSED DATE. The table contains one row of data: 5951, Forgot my password, New, 1/22/18.

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

# PORTAL INTRODUCTION

## A QUICK “HOW TO” GUIDE

Submit a Ticket

1 Summary

2 Department  
Choose department

3 Description

CANCEL SUBMIT

### Mobile

Mobile device navigation:

- The top menu bar is replaced by the lower right button, but functions nearly the same.

