



Client Portal Guide

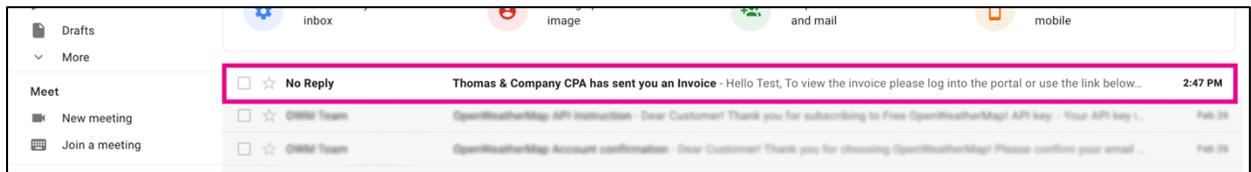
Viewing/Paying Invoices

STEP ONE:

Check your email

When we upload a new invoice to your portal, you'll receive a notification via email, similar to the one below.

NOTE: if you're expecting an invoice but don't see an email, try checking your junk/spam folders. If you see this email in one of those folders, be sure to mark it as "Not Spam" so that future messages reach your inbox!



STEP TWO:

Log in and locate the invoice

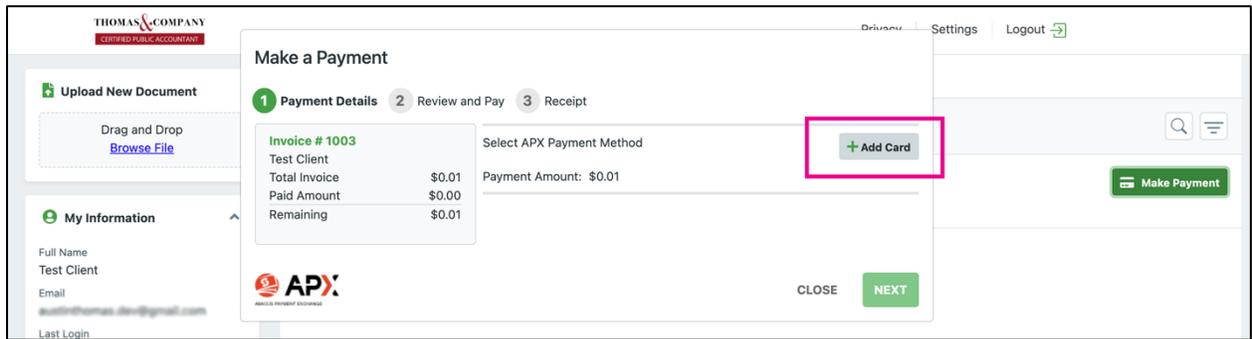
Log into your portal and navigate to the the **Invoices** tab. Here, you'll be able to view all of your invoices, including those you've already paid. Locate the invoice in question (if it's new, it should be at the top). When you're ready to pay your invoice, press the **Make Payment** button.



STEP THREE: Select “Add Card”

After pressing the Make Payment button, you'll see a popup like the one below. The first step is to press the **add card** button – even if you plan on paying with ACH.

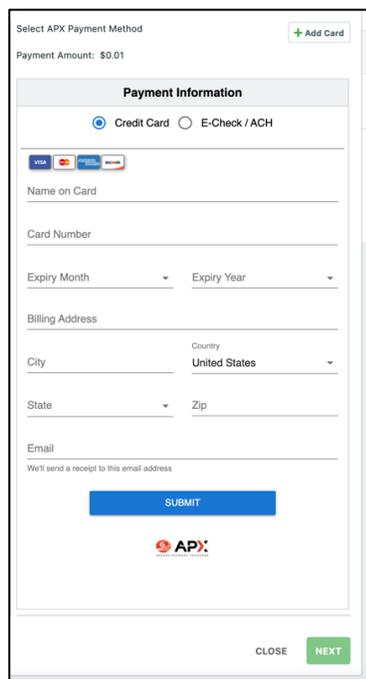
**A note on payment security can be found at the bottom of this guide*



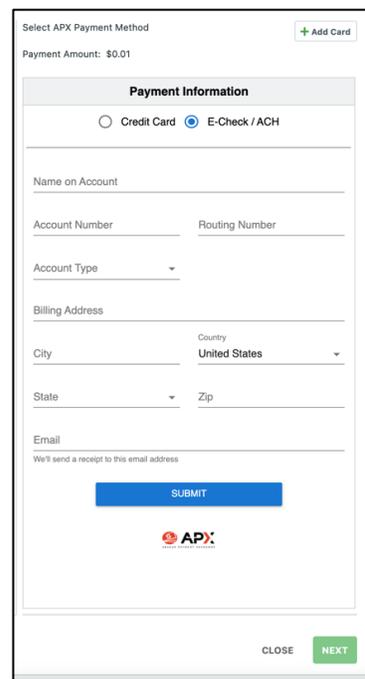
STEP FOUR: Select a payment type, then enter your information

After pressing Add Card you will be prompted to enter payment information. At the top, select either **Credit Card** or **E-Check/ACH** ([Automated Clearing House](#)), then enter the information for the card/account you would like to pay with. When you're finished, press NEXT.

Credit Card



E-Check/ACH



STEP FIVE:

Select the card/account from the APX Payment Method menu

After you've added a payment method, you must select it by clicking the checkbox next to it in the Payment Method menu, as shown below. Once you have a payment method checked, press NEXT.

Make a Payment

1 **Payment Details** 2 Review and Pay 3 Receipt

Invoice # 1003
Test Client
Total Invoice \$0.01
Paid Amount \$0.00
Remaining \$0.01

Select APX Payment Method + Add Card

Acct. Type	Acct. Number	Expiration	Acct. Name	Delete
<input checked="" type="checkbox"/> Visa	[REDACTED]	[REDACTED]	[REDACTED]	[Delete Icon]

Payment Amount: \$0.01

APX ASACUS PAYMENT EXCHANGE

CLOSE **NEXT**

STEP SIX:

Confirm your details and submit your payment

Make a Payment

Payment Details 2 **Review and Pay** 3 Receipt

PAYMENT DETAILS

Invoice # 1003
Test Client
Total Invoice \$0.01
Paid Amount \$0.00
Remaining Amount \$0.01

[REDACTED]

Payment Date **March 2, 2021** Payment Amount **\$0.01**

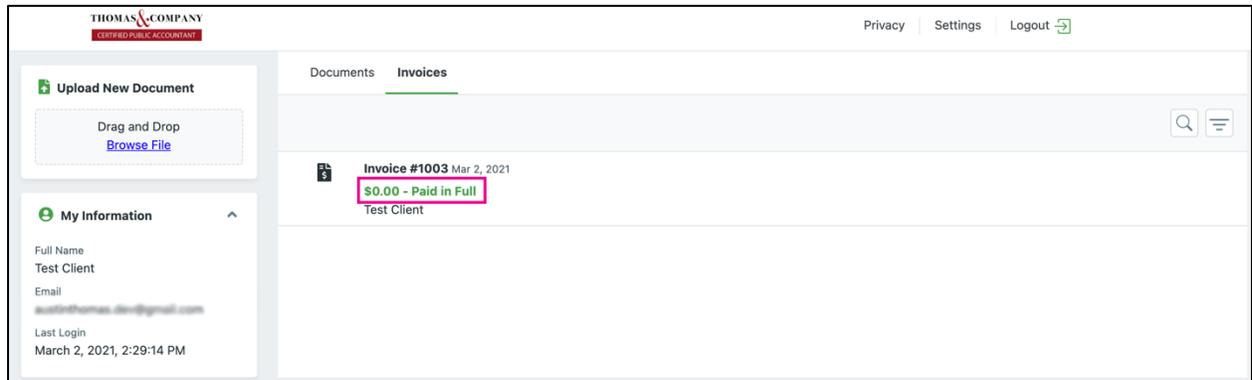
APX ASACUS PAYMENT EXCHANGE

CLOSE PREVIOUS **PAY**

Congratulations! You've successfully paid your invoice using the secure client portal.

We'll be notified by email when you've submitted a payment on your portal. If you'd like to view all of the invoices on your portal, you may do so by navigating again to the **Invoices tab** at the top.

Notice that invoices you've already fully paid display a balance of \$0.00, as well as a message that says "Paid in Full."



*A Note on Payment Security:

Our client portal uses Abacus Payment Exchange (APX) to process electronic payments. A note from APX on security & compliance:

“Your customers can be confident that their data is secure. We are fully in compliance with industry standards like the Payment Card Industry Data Security Standard (PCI DSS), using PCI-compliant 256-bit encryption to protect client payment data.”

Here are a few resources that provide more information on APX & security:

- [APX Landing Page](#)
- [Article: Abacus Unveils Integrated, Secure Credit Card and E-Check Processing](#)
- [Article: AbacusNext Launches the Abacus Payment Exchange](#)