



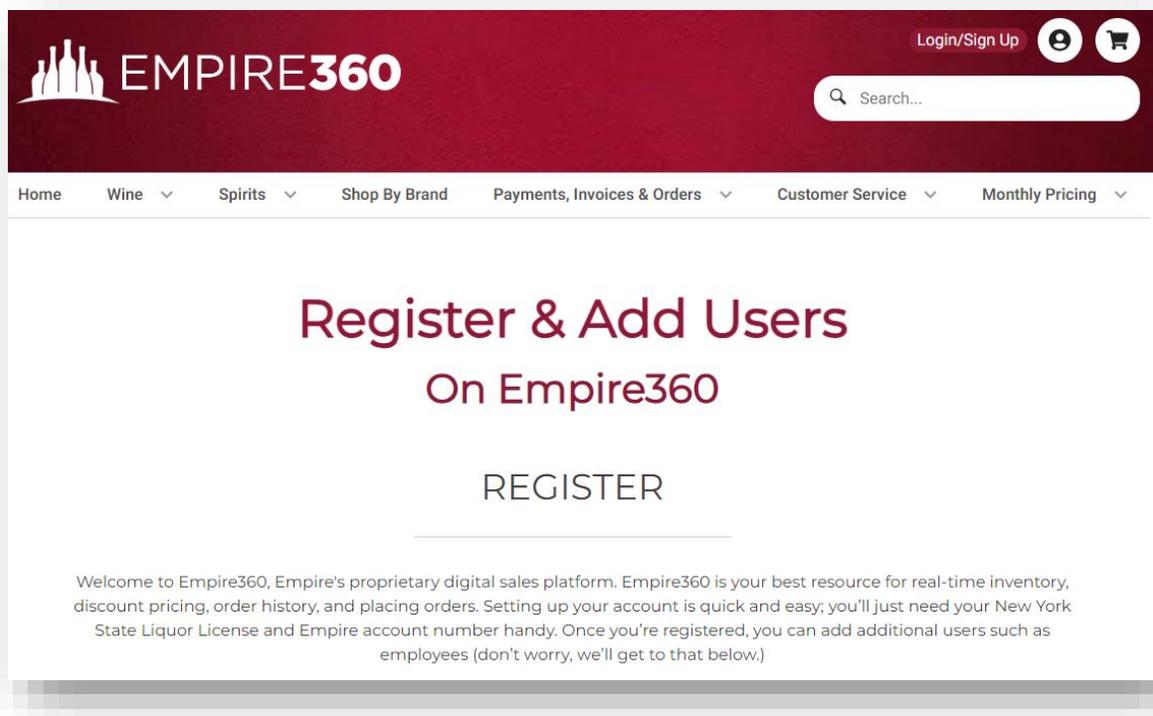
Payments, Invoices & Orders

Quick Links:

- [Accessing Empire360](#)
- [Billing](#)
- [Banking Information](#)
- [Banking/Verification Request](#)
- [Banking](#)
- [Banking – Email Confirmation](#)
- [Connect Bank Accounts](#)
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- [Paying Invoices](#)
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- [Balance](#)
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Accessing Empire360

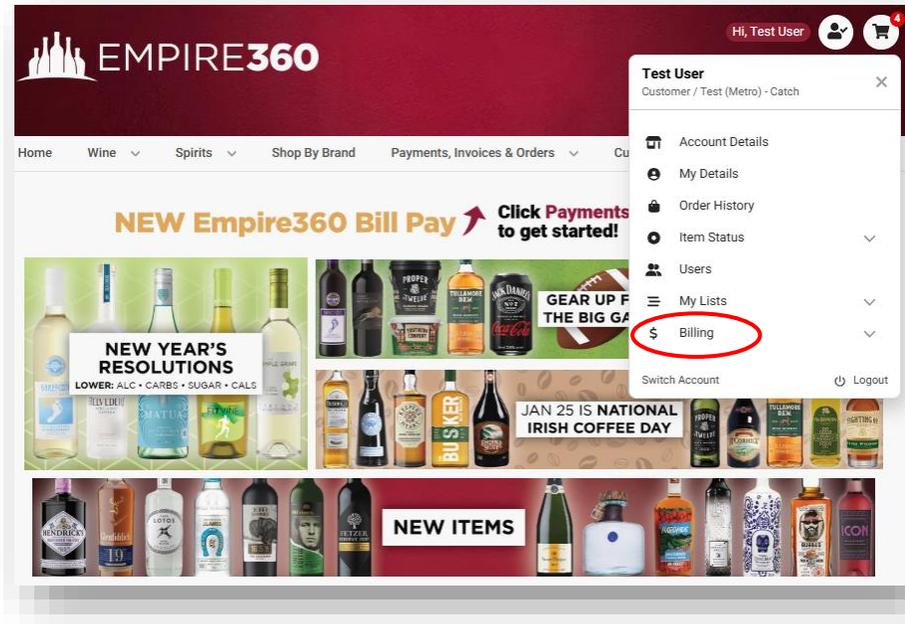
1. Go to <https://empire360.com/>
2. Log into your account
3. If you do not have an account, please visit <https://empire360.com/pages/register>
4. If you need further assistance creating an Empire360 account, please contact Empire Merchants Customer Service



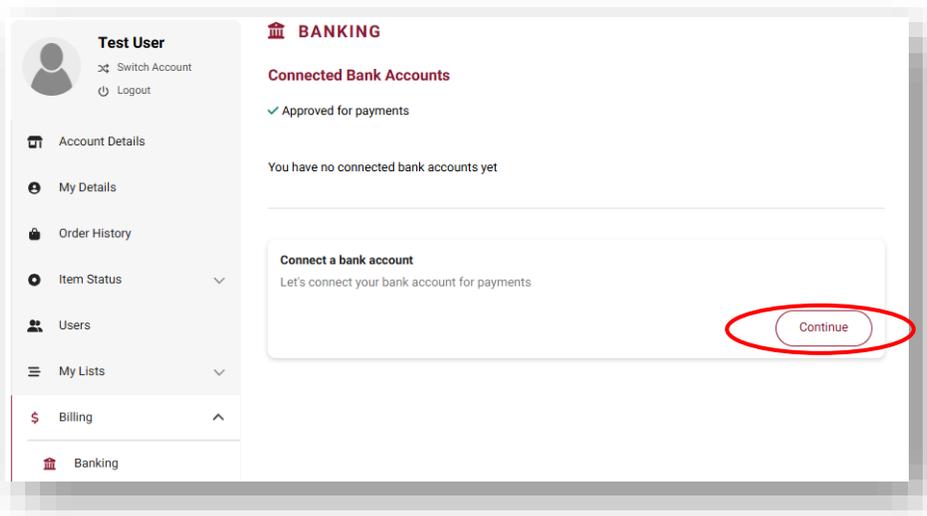
Billing

By tapping on the dropdown next to **Billing**, you can view:

- Banking
- Payments
- Invoices
- Balance
- Reporting

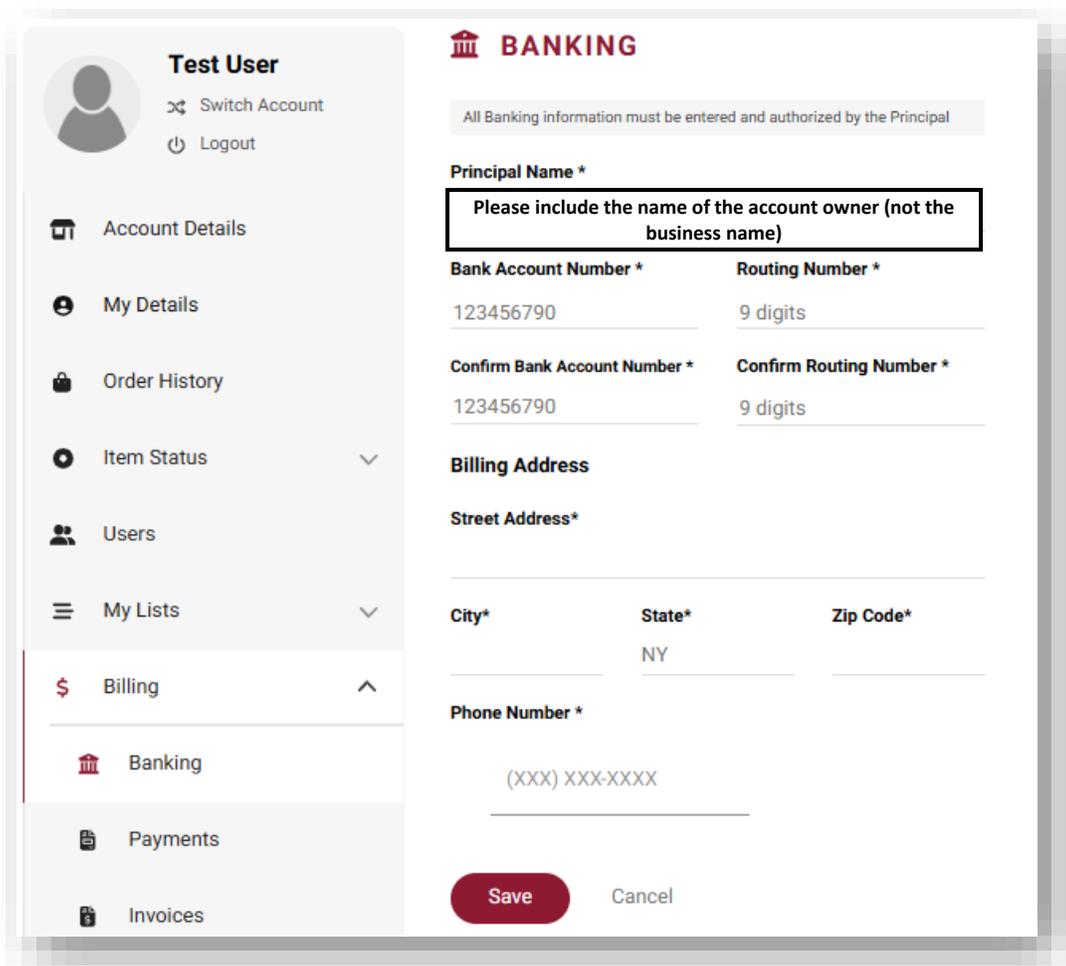


- To start paying online, click on **Continue** below **Connect a bank account**



Banking Information

- A bank account must be selected as the default payment method
- The bank account should be set up by the principal of the account
- You can set up multiple bank accounts as needed
- After you click “Save” there are still more steps to complete before the bank account will be considered for approval



The screenshot shows a user dashboard for 'Test User' with a sidebar menu on the left and a main content area on the right. The sidebar menu includes: Account Details, My Details, Order History, Item Status, Users, My Lists, Billing, Banking (highlighted with a red arrow), Payments, and Invoices. The main content area is titled 'BANKING' and contains a warning: 'All Banking information must be entered and authorized by the Principal'. Below this is a form with the following fields:

- Principal Name ***: A text input field with a tooltip that says 'Please include the name of the account owner (not the business name)'. The field is currently empty.
- Bank Account Number ***: A text input field containing '123456790'.
- Routing Number ***: A text input field containing '9 digits'.
- Confirm Bank Account Number ***: A text input field containing '123456790'.
- Confirm Routing Number ***: A text input field containing '9 digits'.
- Billing Address**: A section with a **Street Address*** field (empty).
- City***, **State***, and **Zip Code***: Three text input fields. The State field contains 'NY'.
- Phone Number ***: A text input field with a placeholder '(XXX) XXX-XXXX'.

At the bottom of the form are two buttons: 'Save' (a red button) and 'Cancel'.

Banking / Verification Request

In this screen you must :

- Attach a screenshot of a canceled check or a letter from the bank verifying your account ownership
- Provide a digital signature
- Agree to the terms of service

Test User
Switch Account
Logout

BANKING / REQUEST VERIFICATION

ACH Direct Debit**** 1111

To add a bank account to your **Empire Merchants** account, we require either a copy of a voided check or a recent bank letter verifying account ownership. The bank account must be a business checking account. Savings, deposit-only, and prepaid debit accounts cannot be accepted.

Either document uploaded must meet the following requirements:

Voided check:

- Includes the account holder's name (either the DBA or legal name of your business)
- If an address is listed, it matches the address we have on file for your business
- Starter or temporary checks are not valid

Bank Letter:

- Printed on bank letterhead
- Includes the name of your bank
- Includes the account holder's name (either the DBA or legal name of your business)
- Includes the ABA/routing number and account number
- Signed by a bank representative
- Was issued within the last 6 months (with the issue date clearly listed)
- Cannot be a direct deposit form

Choose File | Voided Check.png

Add Signature

I agree to the terms of service

Submit Cancel

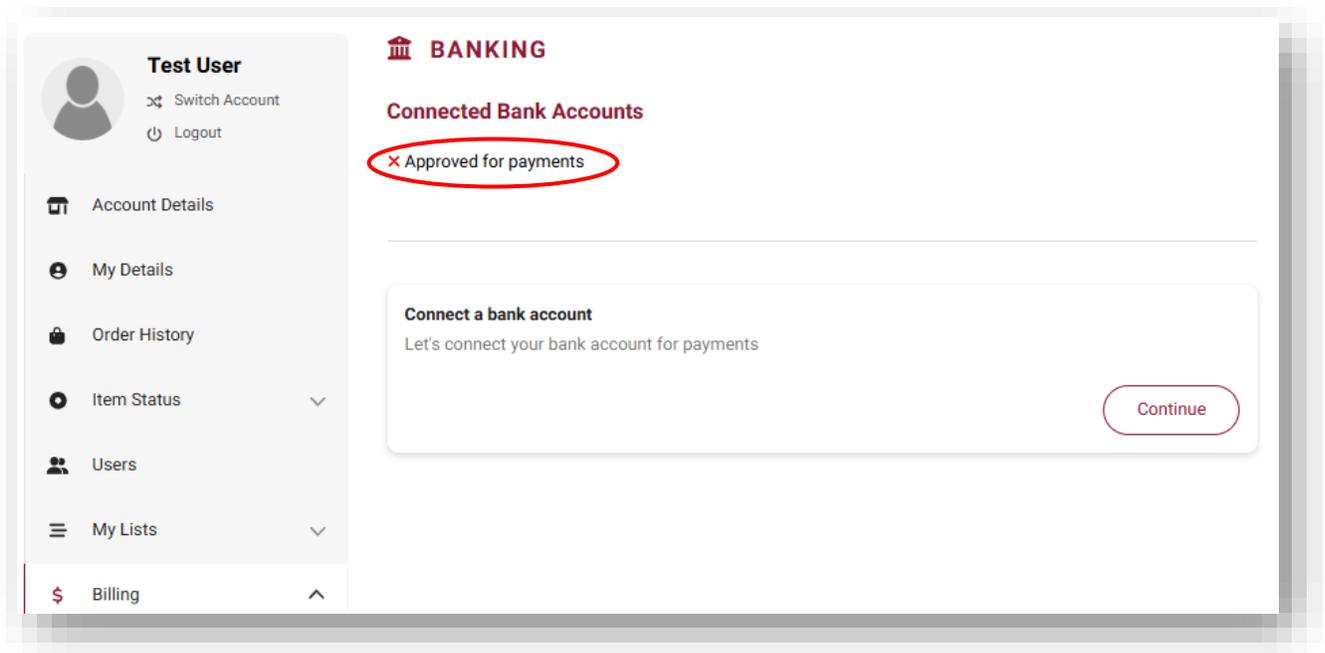
Add Signature

Test

Confirm Clear

Banking

- Once you have submitted the necessary information you will receive a confirmation email
- You will not be eligible to make payments until you have received a second email that your payment has been approved by Empire Merchants
 - It will take approximately 48 hours (about 2 business days) to be approved
 - You will also receive an email if your banking information is declined, in which case you will not be able to make payments and will have to enter a new banking information if you wish to pay via Empire360



Banking – Email Communications

- This is a sample of the email confirmations you will receive

Upon submitting your banking information

Dear Test User,

Thank you for submitting your banking details for verification. Our team will review and get back to you soon.

Account Number: ch_test

Name: Test

Bank Account Number: **** 1111

Please be aware that some corporate accounts require you to safelist payees, or an ACH transaction may be blocked. To avoid these delays, please read below for further details about allowing transactions from our Empire360 payment processor.

Q: Why did my bank not authorize my payment?

A: When moving to Empire360, we changed payment providers. An ACH Company ID identifies an entity like Adyen that collects payments through the ACH network. Unknown entities are often blocked when they collect payments from business accounts. The transaction will result in a chargeback with reason code R29, Corporate customer advises not authorized. You may need to instruct your bank to add Adyen's ACH company ID to the list of entities that are allowed to debit your business account. The Adyen ACH company ID for payments is 8263863381.

For more information and other FAQs please visit:

<https://empire360.com/pages/startbillpay>

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Phone: (800) 338-3880 | Email: empire360support@empiremerchants.com

www.Empire360.com

After Empire verifies your banking information

Dear Test User,

Your banking details have been approved. You are welcome to make payments on empire360.com.

Please be aware that some corporate accounts require you to safelist payees, or an ACH transaction may be blocked. To avoid these delays, please read below for further details about allowing transactions from our Empire360 payment processor.

Account Number: ch_test

Name: Test

Bank Account Number: ****

Q: Why did my bank not authorize my payment?

A: When moving to Empire360, we changed payment providers. An ACH Company ID identifies an entity like Adyen that collects payments through the ACH network. Unknown entities are often blocked when they collect payments from business accounts. The transaction will result in a chargeback with reason code R29, Corporate customer advises not authorized. You may need to instruct your bank to add Adyen's ACH company ID to the list of entities that are allowed to debit your business account. The Adyen ACH company ID for payments is 8263863381.

For more information and other FAQs please visit:

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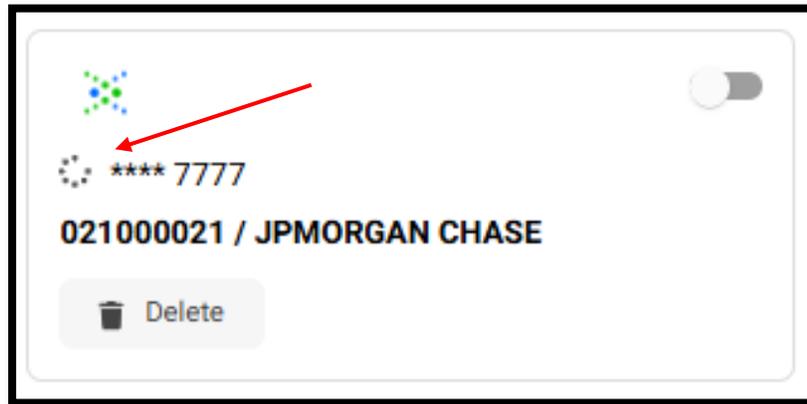
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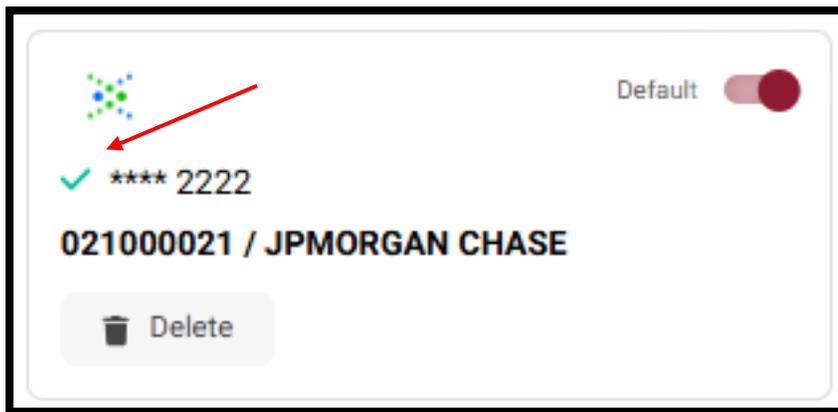
www.Empire360.com

Banking

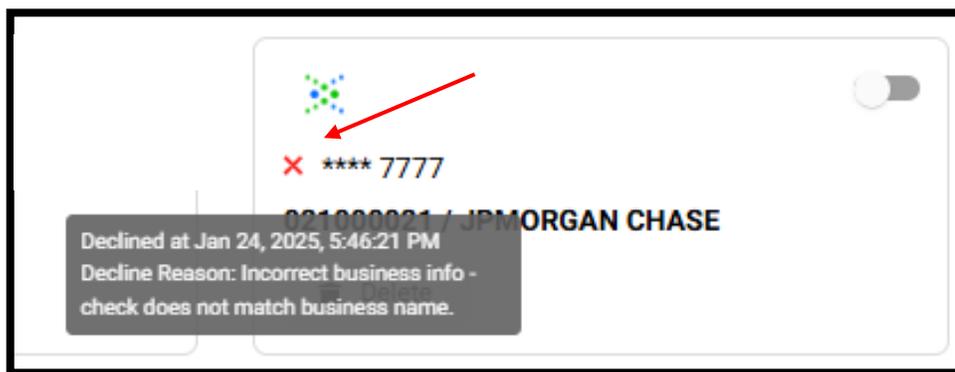
- Once you submit your banking information, it will show as **Pending** (loading symbol) before it is approved or declined



- Approved** bank accounts show the green checkmark

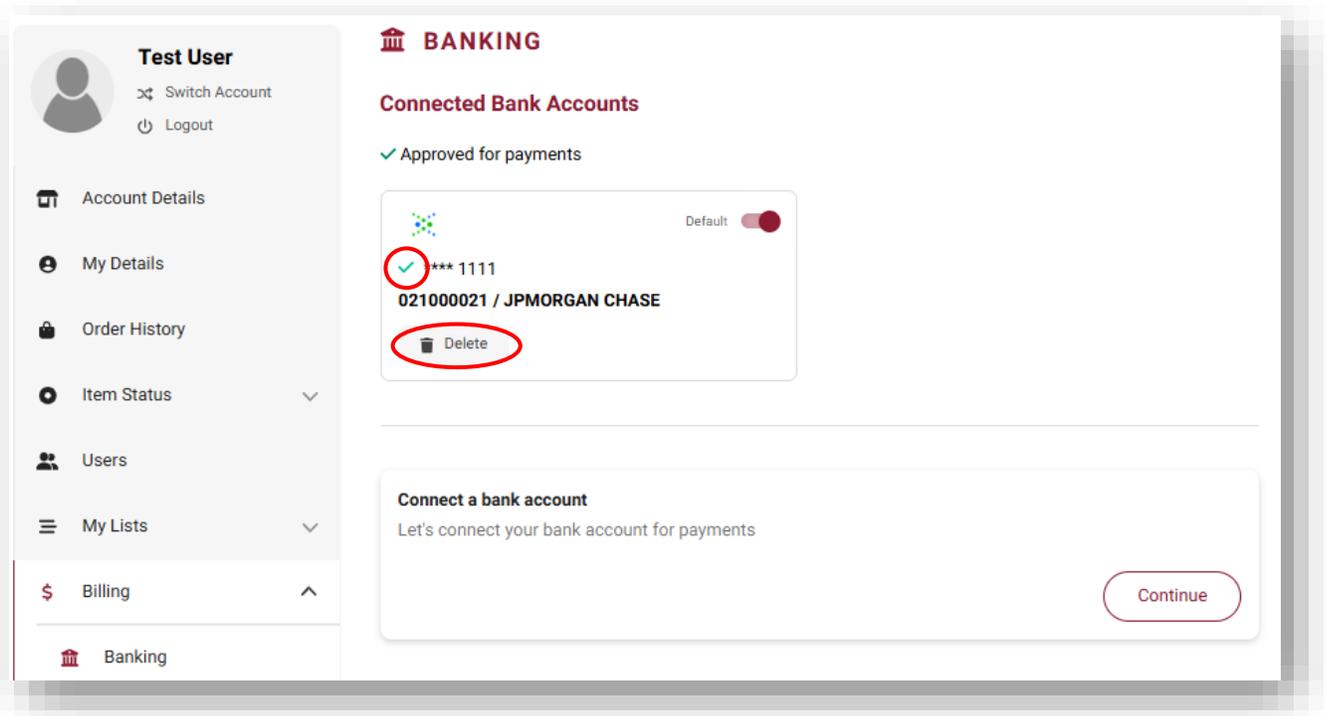


- Declined** bank accounts show the red X and will show the reason the payment method was declined (hover over X)



Connected Bank Accounts

- Once you are approved, your payment method will show with a green check next to it
- You can toggle the button to make it your default payment method
- If you are no longer associated with a specific bank account, you can also remove methods of payment from this screen by selecting the **Delete** button.



Users

- Only **Managers** and **Admins** will have full access to the account details
- To view your user account role, visit the **Users** tab
 - You will not be able to access the **Users** tabs if you are logged in as a **Buyer** or **Payer**
 - If you are unsure of your role, please contact customer service.
- As an Admin, you may add users by clicking the (...) on the top of the section

Name	Email	Phone	Role	Confirmed Account
Test User	temoyad223@fanicle.com	Missing	Manager	✓
Saar Schwartz	saars@cityhive.net	+12489906739	Buyer	✓
Otto Capps - Customer	ocapps@empiremerchants.i	+12125551212	Admin	✓
Edward Lederer	elederer@empiremerchants	+17183835500	Admin	✓
Thomas De Mola	tdemola@empiremerchants	+16319425105	Admin	✓
Albert Ferrante	aferrante@empiremerchant	Missing	Admin	✓

- After that, click on the (+) that will appear 
- You will then be able to add new users who should have access to the account

Create New User

Name *

Email *

Phone

Role *

Update

Please be sure to enter the correct role for the new user

- To switch a user role, simply click into the role, make the change and click save.

Invoices

- The **Invoices** tab shows the list of invoices and available credits
- Key Columns:
 1. PDF: downloads a file with a snapshot of your invoice
 2. Type: indicates whether it is an invoice or a credit
 3. Due date: dates when payment is due
 4. Payment Terms: payment term for a specific invoice
 5. Status: show the current payment status
- Sorting:
 - Automatically set to sort from oldest to newest Due Date
 - Click on a column header to sort by the items by that column

Test User
Switch Account
Logout

Account Details
My Details
Order History
Item Status
Users
My Lists
Billing
Banking
Payments

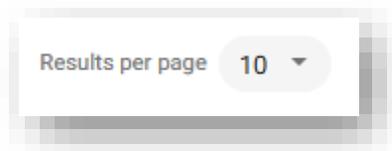
INVOICES (9)

Invoice # Search by Invoice #

Active filters: Clear all filters Open x Pay (0)

<input type="checkbox"/>	① Type	②	Invoice Date	Due Date	③	Payment Terms	④	Status	⑤	Gross Total
<input type="checkbox"/>	Credit	#ch_test_1828935 credits	Dec 06, 2023	Dec 06, 2023		P30		open		-\$2,415.00
<input type="checkbox"/>	Invoice	#ch_test_9811298	Nov 14, 2024	Dec 14, 2024 ▲ OVERDUE		P30		open		\$6,752.70
<input type="checkbox"/>	Invoice	#ch_test_9814963	Nov 19, 2024	Dec 19, 2024 ▲ OVERDUE		P30		open		\$1,339.44
<input type="checkbox"/>	Invoice	#ch_test_9816670	Nov 20, 2024	Dec 20, 2024 ▲ OVERDUE		P30		open		\$6,507.39
<input type="checkbox"/>	Invoice	#ch_test_9824246	Nov 26, 2024	Dec 26, 2024 ▲ OVERDUE		P30		open		\$1,804.11
<input type="checkbox"/>	Invoice	#ch_test_9827950	Dec 02, 2024	Jan 01, 2025 ▲ OVERDUE		P30		open		\$2,152.08
<input type="checkbox"/>	Invoice	#ch_test_9833067	Dec 04, 2024	Jan 03, 2025 ▲ OVERDUE		P30		open		\$2,493.03
<input type="checkbox"/>	Invoice	#ch_test_9870452	Dec 31, 2024	Feb 05, 2025		P30		open		\$406.64
<input type="checkbox"/>	Invoice	#ch_test_9873218	Jan 08, 2025	Feb 07, 2025		P30		open		\$852.87

- You can choose to view more invoices per page by changing the number at the bottom of the page, as per below:



Searching for Invoices

- To facilitate finding specific invoices, you may also click on the filter icon located on the top right
 - The default screen is set to show open invoices only

The screenshot shows the 'INVOICES (9)' page. At the top, there is a search bar for 'Invoice #' and a filter icon (a downward arrow) circled in red. Below the search bar, there are 'Active filters' for 'Clear all filters' and 'Open x'. A 'Pay (0)' button is also visible. The main table lists invoices with columns for Type, Invoice Date, Due Date, Payment Terms, Status, and Gross Total. The filters sidebar on the right shows 'Status' with 'Open' selected (circled in red), and other options like 'Paid' and 'Scheduled'. The sidebar also has sections for 'Type', 'Invoice Date', and 'Due Date'.

Type	Invoice Date	Due Date	Payment Terms	Status	Gross Total
Credit # #ch_test_1828935 credits	Dec 06, 2023	Dec 06, 2023	P30	open	-\$2,415.00
Invoice #ch_test_9811298	Nov 14, 2024	Dec 14, 2024 ▲ OVERDUE	P30	open	\$6,752.70
Invoice #ch_test_9814963	Nov 19, 2024	Dec 19, 2024 ▲ OVERDUE	P30	open	\$1,339.44
Invoice #ch_test_9816670	Nov 20, 2024	Dec 20, 2024 ▲ OVERDUE	P30	open	\$6,507.39
Invoice #ch_test_9824246	Nov 26, 2024	Dec 26, 2024 ▲ OVERDUE	P30	open	\$1,804.11
Invoice #ch_test_9827950	Dec 02, 2024	Jan 01, 2025 ▲ OVERDUE	P30	open	\$2,152.08
Invoice #ch_test_9833067	Dec 04, 2024	Jan 03, 2025 ▲ OVERDUE	P30	open	\$2,493.03
Invoice #ch_test_9870452	Dec 31, 2024	Feb 05, 2025	P30	open	\$406.64
Invoice #ch_test_9873218	Jan 08, 2025	Feb 07, 2025	P30	open	\$852.87

Paying Invoices

- To pay an invoice, click the checkbox on the leftmost column and then click **Pay** on the top right
 - You may select multiple invoices at once
 - Credits associated with a specific invoice will be automatically applied on the Checkout screen
- You will then be taken to the Checkout Screen

The screenshot shows the 'INVOICES (9)' page with a sidebar on the left for 'Test User'. The main table is the same as in the previous screenshot. The checkbox for the first invoice (Nov 14, 2024) is checked and circled in red. A 'Pay (1)' button is circled in red at the top right. A message above the table says '1 invoice is selected. Select all 9 invoices - Clear all'.

Type	Invoice Date	Due Date	Payment Terms	Status	Gross Total
Credit # #ch_test_1828935 credits	Dec 06, 2023	Dec 06, 2023	P30	open	-\$2,415.00
Invoice #ch_test_9811298	Nov 14, 2024	Dec 14, 2024 ▲ OVERDUE	P30	open	\$6,752.70
Invoice #ch_test_9814963	Nov 19, 2024	Dec 19, 2024 ▲ OVERDUE	P30	open	\$1,339.44
Invoice #ch_test_9816670	Nov 20, 2024	Dec 20, 2024 ▲ OVERDUE	P30	open	\$6,507.39
Invoice #ch_test_9824246	Nov 26, 2024	Dec 26, 2024 ▲ OVERDUE	P30	open	\$1,804.11
Invoice #ch_test_9827950	Dec 02, 2024	Jan 01, 2025 ▲ OVERDUE	P30	open	\$2,152.08
Invoice #ch_test_9833067	Dec 04, 2024	Jan 03, 2025 ▲ OVERDUE	P30	open	\$2,493.03
Invoice #ch_test_9870452	Dec 31, 2024	Feb 05, 2025	P30	open	\$406.64
Invoice #ch_test_9873218	Jan 08, 2025	Feb 07, 2025	P30	open	\$852.87

Checkout Screen

- See below/next page for the checkout screen and details



Go Back Continue Shopping

CHECKOUT Logged in as **Test (Metro) - Catch / Test User / temoyad223@fanicle.com** [Not you? Logout](#)

PLEASE NOTE: There is a limit of \$1,000,000 per payment. If you need to pay more than that, please break it into multiple transactions. For customers with multiple bank accounts, please confirm the correct bank account is selected before submitting the payment.

Payment

✓ Payment:  **ACH Direct Debit **** 1111** Edit

✓ Payment would be processed immediately Edit

Reference Notes

Reference notes for the invoice 0 / 30

Review

Invoice Date	Due Date	Gross Total	Open Amount	Amount to pay
Nov 14, 2024	Dec 14, 2024	\$6,752.70	\$6,752.70	\$6,752.70 
#ch_test_9811298				\$0.00 left

1 Invoice

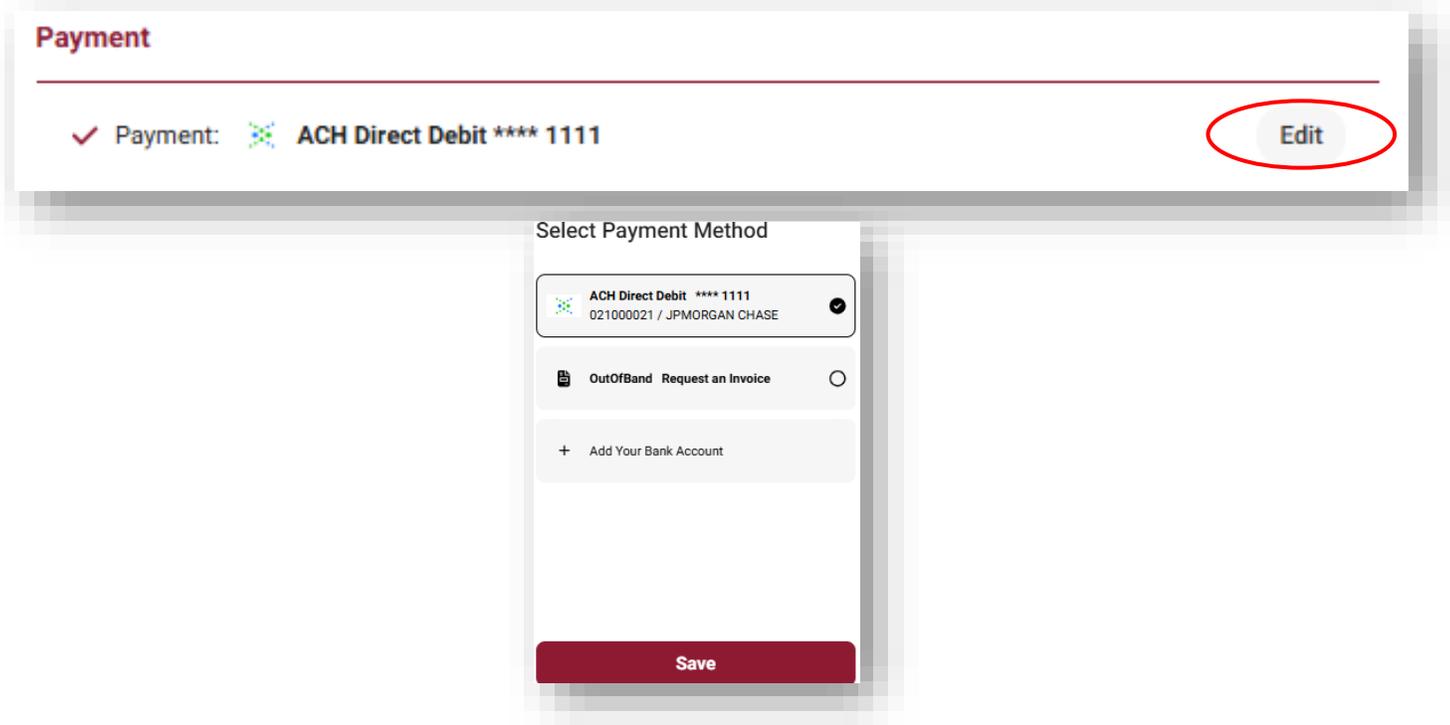
Pay \$6,752.70 towards the invoice - ch_test_9811298

Pay Invoice

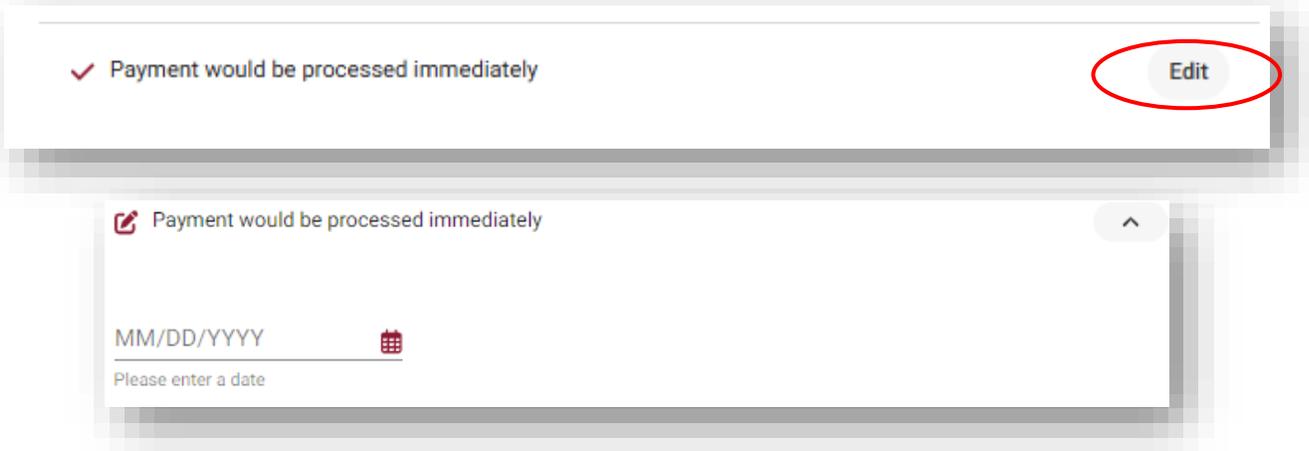
By paying my invoice I agree to the City Hive Inc. and Empire Merchants Empire360 terms and conditions and the privacy policy.

Checkout Screen

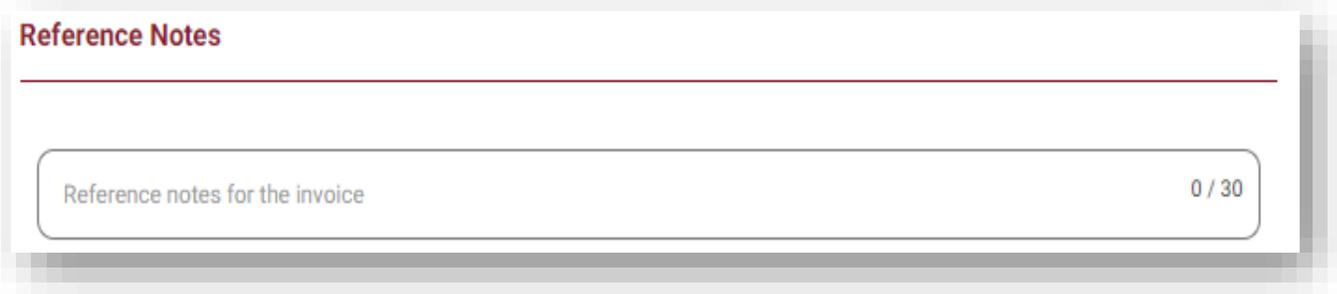
- Payment section allows you to:
 - Edit your payment method and select a new one:



- Schedule your payments:



- You may enter payment reference notes below:



Checkout Screen

- Review your payment preferences:
 - You may partially pay an invoice by adjusting the Amount to Pay
 - You may also delete a specific invoice by clicking on the trash can

Review

Invoice Date	Due Date	Gross Total	Open Amount	Amount to pay
Nov 14, 2024 #ch_test_9811298	Dec 14, 2024	\$6,752.70	\$6,751.70	\$3.00  \$6,748.70 left

- Finally, click the **Pay Invoice** button to submit your payment:

Pay Invoice

By paying my invoice I agree to the City Hive Inc. and Empire Merchants Empire360 [terms and conditions](#) and the [privacy policy](#).

Original Subtotal	\$3.00
Subtotal	\$3.00
Total	\$3.00

Payment Confirmation Screen

- You will then be directed to the Payment Confirmation Screen, where you will be able to visualize key payment information:

EMPIRE360

Hi, Test User

Search...

Home Wine Spirits Shop By Brand Payments, Invoices & Orders Customer Service Monthly Pricing

Open All Invoices



THANK YOU! WE'VE RECEIVED YOUR PAYMENT

[VIEW PAYMENT #6793DDFE](#)

A copy of your receipt has been sent to empiremetcatchtest@empiremetro.com

Payment Details		Summary	
Pay to Empire Merchants at 16 Bridgewater St, Brooklyn, NY 11222, USA		Original Subtotal	\$3.00
Payment Info		Subtotal	\$3.00
Payment Method Invoice Requested		Total	\$3.00

1 Invoice

Invoice #	Type	Payment Date	Total	Paid Amount
#ch_test_9811298	Invoice	Jan 24, 2025	\$6,752.70	\$3.00

Contact Us - Empire Merchants

16 Bridgewater St, Brooklyn, NY 11222, USA
1 (800) 338 - 3880
empire360support@empiremerchants.com

Example – Scheduled Partial Payment

- The checkout screen below shows sample of a scheduled partial payment and includes a reference note indicating that
 - Note that you may edit the amount you would like to pay for each invoice



Go Back Continue Shopping

CHECKOUT

PLEASE NOTE: There is a limit of \$1,000,000 per payment. If you need to pay more than that, please break it into multiple transactions. For customers with multiple bank accounts, please confirm the correct bank account is selected before submitting the payment.

Payment

✓ Payment:  ACH Direct Debit **** 1111 Edit

 Payment Date: 2/6/2025 ^

2/6/2025 
in 12 days

Reference Notes

Scheduled Partial Payment 2/6 29 / 30

Review

Invoice Date	Due Date	Gross Total	Open Amount	Amount to pay
Nov 19, 2024	Dec 19, 2024	\$1,339.44	\$1,339.44	\$13.00 
#ch_test_9814963				\$1,326.44 

1 Invoice

Partially pay \$13.00 towards the invoice - ch_test_9814963

Schedule payment for Feb 6, 2025

By paying my invoice I agree to the City Hive Inc. and Empire Merchants Empire360 [terms and conditions](#) and the [privacy policy](#).

Payments

- To view payments, visit the **Payments** tab:

Test User
Switch Account
Logout

PAYMENTS (25)

Payment # Search by Payment #

Id	Transaction ID	Payment date	Descriptor	Status	Total
#6793de92	Missing	Feb 06, 2025	ch_test_9814963	scheduled	\$13.00
#6793ddfe	#6793ddff	Jan 24, 2025	ch_test_9811298	succeeded	\$3.00
#6793dbdd	#6793dbde	Jan 24, 2025	ch_test_9811298	succeeded	\$1.00
#6756ec9f	#6756ec9f	Dec 09, 2024	On Account Payment	succeeded	\$1,145.23
#6756ecd8	#6756ecd8	Dec 09, 2024	On Account Payment	succeeded	\$427.08
#6756ec9f	#6756ec9f	Dec 09, 2024	On Account Payment	succeeded	\$3,075.38
#6756eca0	#6756eca0	Dec 09, 2024	ch_test_9802473	succeeded	\$5,109.80
#6756ec9e	#6756ec9e	Dec 09, 2024	On Account Payment	succeeded	\$4,328.95
#6756ec9f	#6756eca0	Dec 09, 2024	On Account Payment	succeeded	-\$32.79
#6756ec9e	#6756ec9e	Dec 09, 2024	On Account Payment	succeeded	\$3,600.89

Results per page 10

1 2 3 Next →

- To facilitate finding specific invoices, you may also click on the filter icon located on the top right:

Filters

Status

Pending Scheduled

Charging Canceled

Succeeded

Failed

Payment date

This Week

This Month

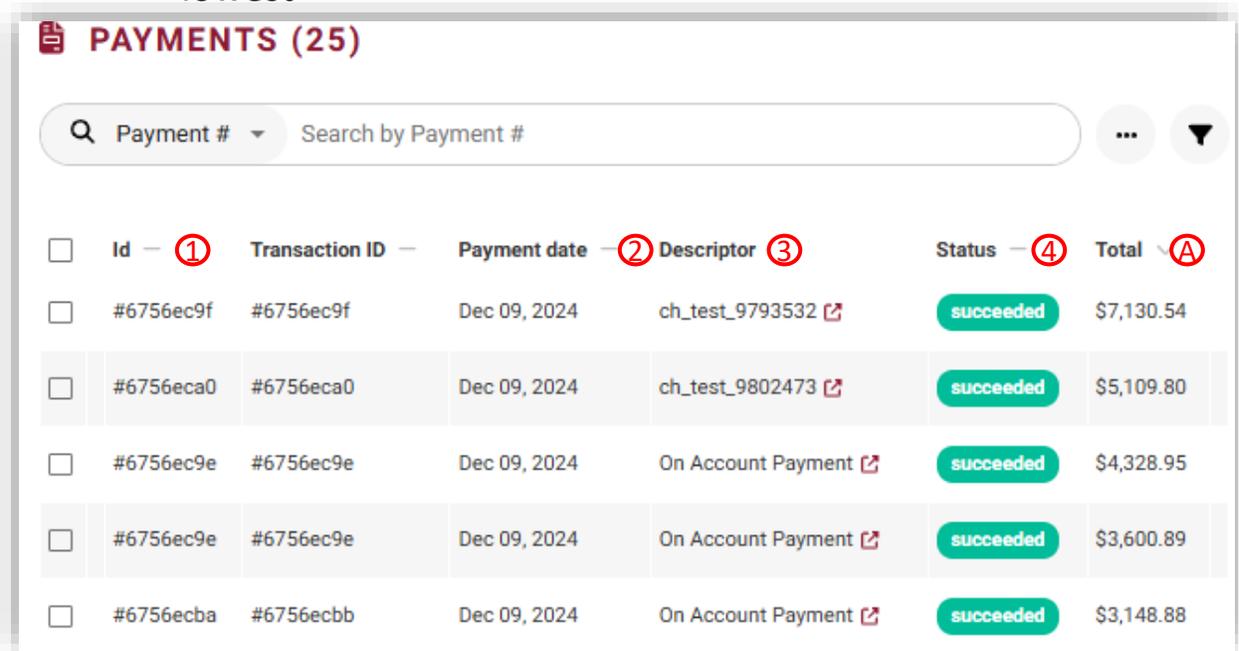
Custom Range

Start Date - End Date

Clear All Apply Filters

Payments

- Key Columns:
 1. ID: invoice number
 2. Payment date: dates when payment is sent to Empire Merchants
 3. Descriptor: see invoice details (see next page)
 4. Status:
 - Paid: invoice paid
 - Scheduled: shown when a payment has been scheduled
 - Charging: recently paid invoice, processing
- Sorting:
 - Click on a column header to sort by the items by that column
 - A. See below for an example of sorting the total from highest to lowest



The screenshot shows a table titled "PAYMENTS (25)" with a search bar and a table of payment records. Red circles and arrows highlight the sorting options on the column headers: "Id" (1), "Payment date" (2), "Descriptor" (3), "Status" (4), and "Total" (A). The "Total" column is sorted in descending order.

<input type="checkbox"/>	Id — ①	Transaction ID —	Payment date — ②	Descriptor ③	Status — ④	Total \A
<input type="checkbox"/>	#6756ec9f	#6756ec9f	Dec 09, 2024	ch_test_9793532 🔗	succeeded	\$7,130.54
<input type="checkbox"/>	#6756eca0	#6756eca0	Dec 09, 2024	ch_test_9802473 🔗	succeeded	\$5,109.80
<input type="checkbox"/>	#6756ec9e	#6756ec9e	Dec 09, 2024	On Account Payment 🔗	succeeded	\$4,328.95
<input type="checkbox"/>	#6756ec9e	#6756ec9e	Dec 09, 2024	On Account Payment 🔗	succeeded	\$3,600.89
<input type="checkbox"/>	#6756ecba	#6756ecbb	Dec 09, 2024	On Account Payment 🔗	succeeded	\$3,148.88

Payments

- Click the descriptor column to view invoice payment details and more:
 - Items part of the invoice:

INVOICES / INVOICE #CH_TEST_9793532

Invoice Number: **ch_test_9793532**

9 Products | 1 Item | 27 Cases | 1 Order

DELIVERY CHARGE 1 x \$0.00

Order #672b3f0d0bec72b58785100

	Belvedere Vodka Organic 1 L	10 Cases	x	\$182.21	\$1,822.10
		10 Cases		Subtotal	\$1,822.10
	Groth Cabernet Sauvignon Oakville 2021 750 mL	2 Cases	x	\$583.97	\$1,167.94
		2 Cases		Subtotal	\$1,167.94
	Louis Jadot Pouilly-Fuisse Chardonnay 2022 2023 750 mL	2 Cases	x	\$287.88	\$575.76
		2 Cases		Subtotal	\$575.76
	Maestro Dobel Diamante Reposado Tequila 750 mL	1 Cases	x	\$244.84	\$244.84
		1 Cases		Subtotal	\$244.84
	Clase Azul Reposado Tequila 750 mL	1 Cases	x	\$832.12	\$832.12
		1 Cases		Subtotal	\$832.12
	Great Jones Straight Bourbon 750 mL	2 Cases	x	\$191.96	\$383.92
		2 Cases		Subtotal	\$383.92
	Hendrick's Gin 1 L	5 Cases	x	\$223.01	\$1,115.05
		5 Cases		Subtotal	\$1,115.05
	Su Casa Mezcal Espadin 750 mL	3 Cases	x	\$167.96	\$503.88
		3 Cases		Subtotal	\$503.88
	Domaine Serene Yamhill Cuvée Willamette Valley 2019 750 mL	1 Cases	x	\$479.93	\$479.93
		1 Cases		Subtotal	\$479.93

Original Amount		Remaining Amount	
Original Subtotal	\$7,130.54	Original Subtotal	\$0.00
Subtotal	\$7,130.54	Subtotal	\$0.00
Total	\$7,130.54	Total	\$0.00

- Invoice History, which includes the dates and users responsible for specific actions:

Invoice History

- Fully Paid \$7130.54 System
- Monday, Dec 9, 2024 8:11 AM Test (Metro) - Catch - CustomerPayment
Partial payment of \$0.00
- Monday, Dec 9, 2024 8:11 AM Test (Metro) - Catch - CustomerPayment
Created payment of \$0.00
- Wednesday, Nov 20, 2024 10:56 AM System
Created invoice for \$7130.54

Canceling Scheduled Payments

- To cancel a scheduled payment:
 1. Visit the **Payments** tab
 2. Search for the payment
 3. Click on the circular arrow at the far right of the table

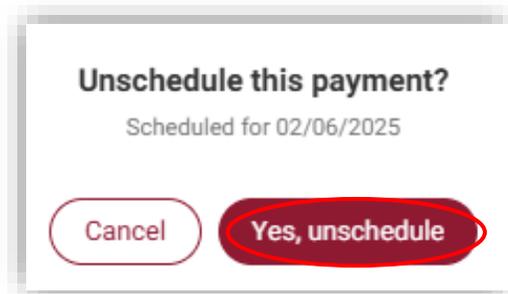
Test User
Switch Account
Logout

PAYMENTS (25)

Payment # Search by Payment #

<input type="checkbox"/>	Id	Transaction ID	Payment date	Descriptor	Status	Total
<input type="checkbox"/>	#6793de92	Missing	Feb 06, 2025	ch_test_9814963	scheduled	\$13.00
<input type="checkbox"/>	#6793ddfe	#6793ddff	Jan 24, 2025	ch_test_9811298	succeeded	\$3.00
<input type="checkbox"/>	#6793dbdd	#6793dbde	Jan 24, 2025	ch_test_9811298	succeeded	\$1.00

4. Confirm that you would like to unschedule the payment and click **Yes, unschedule**



5. The payment will then show as canceled

<input type="checkbox"/>	#6793de92	Missing	Feb 06, 2025	ch_test_9814963	canceled	\$13.00
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Balance

- Here you will be able to:
 1. View your Balance
 2. See open invoices
 3. If you have any open credits, they will appear here

- You are also able to pay on account:

Test User
Switch Account
Logout

BALANCE

\$2,415.00 ①
1 Open Credits

\$22,304.26 ③
8 Open Invoices ②

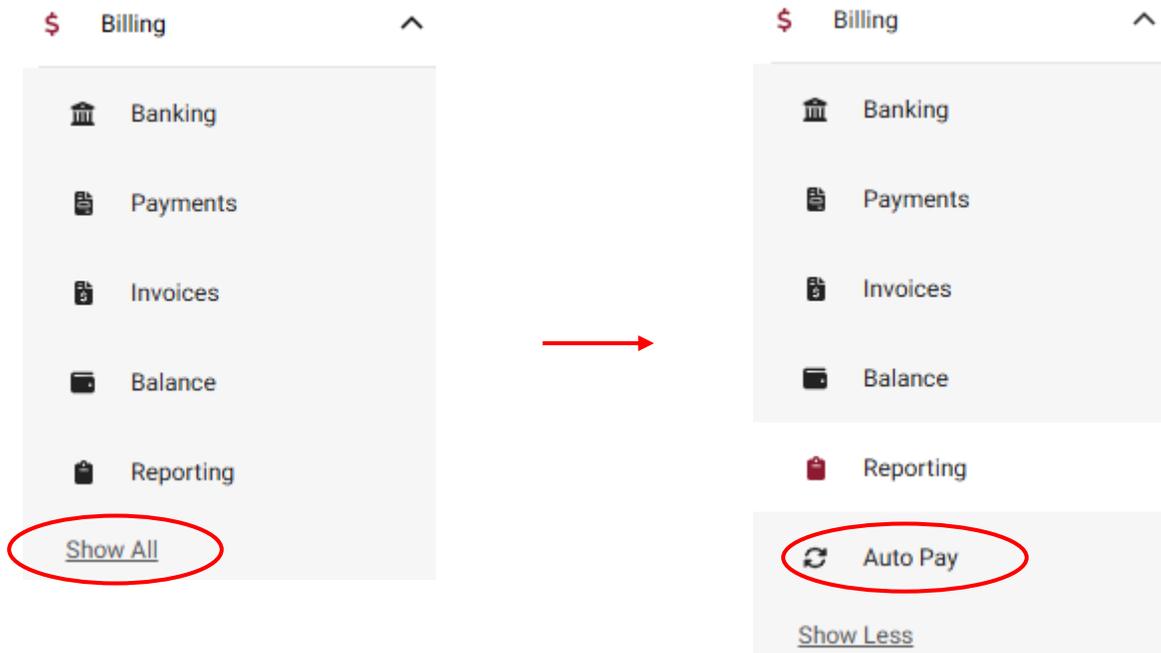
Pay on account

Balance History

Created	'Created payment of \$13.00 on invoices #ch_test_9814963'	Test User
Scheduled	'Scheduled \$13.00 for 2025-02-06 on invoices #ch_test_9814963'	Test User
Canceled	'Canceled \$13.00 on invoices #ch_test_9814963'	Test User
Created	'Created payment of \$3.00 on invoices #ch_test_9811298'	Test User
Charging	'Charging \$3.00 on invoices #ch_test_9811298'	Test User
Succeeded	'Succeeded \$3.00 on invoices #ch_test_9811298'	Test User - Online
Created	'Created payment of \$1.00 on invoices #ch_test_9811298'	Test User

AutoPay

- To view and change the AutoPay settings, click on:
- Billing > Show All then Auto Pay will appear



- To enable AutoPay, toggle the button:

BILLING

What does AutoPay do?

AutoPay will automatically schedule invoices based on the terms you have below, using your default payment method.



- You will then be asked to confirm your selection

Enable AutoPay?

Are you sure you want to enable AutoPay? This will only apply to new invoices and not existing ones



AutoPay Settings

- If you wish to only enable automatic payment for invoices up to a certain amount, include the amount desired in the following section:

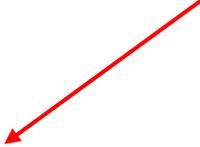
 **BILLING**

What does AutoPay do?

AutoPay will automatically schedule invoices based on the terms you have below, using your default payment method.

AutoPay Invoices

AutoPay invoices up to: _____ ?



- By doing so, any invoices that exceed the amount selected will **not** be scheduled for payment

Save

- Remember to Save:
- If you receive any invoices higher than the specified amount, you will receive an email notifying of that

AutoPay Settings *AutoPay will only apply to invoices received after it is enabled.*

- Below are the AutoPay options you may select:

BILLING

What does AutoPay do?

AutoPay will automatically schedule invoices based on the terms you have below, using your default payment method.

AutoPay Invoices ← Toggle AutoPay on/off

AutoPay invoices up to: ?

How would you like to pay your invoices? *

Please select...

- Specific day of month **2**
- Last day of month **3**
- Days before due date **4**
- Days after creation date **5**

Save ← Click to save changes

1 Invoices over this amount won't be scheduled and must be paid manually.

Specific day of month ?

Day of month *

2

3 Invoices will be scheduled for payment on the selected day.

How many days before due date should the invoice be charged? ?

Days *

4

How many days after creation date should the invoice be charged? ?

Days *

5

Selecting 0 pays the invoice the same day.

- Upon selecting the desired option, you will receive a confirmation email with your selection

Key Scenarios:

AutoPay invoices on due date	AutoPay invoices upon creation/receipt
<p>How would you like to pay your invoices? *</p> <p>Please select... <input type="text" value="Days before due date"/></p> <p>How many days before due date should the invoice be charged? ?</p> <p>Days * <input type="text" value="0"/></p>	<p>How would you like to pay your invoices? *</p> <p>Please select... <input type="text" value="Days after creation date"/></p> <p>How many days after creation date should the invoice be charged? ?</p> <p>Days * <input type="text" value="0"/></p>

Reporting

- The following reports are available to export:
 1. Charges
 2. Invoices
- Clicking on the desired report will download the selected report in an Excel format

