Billing Portal User Guide

Version 1.2

Contents

Introduction

Welcome to SambaSafety's new Billing Portal. This new billing and invoice portal has been designed to allow you to view line item details and perform billing reconciliation every month. This user guide will explain the different features available to you with the portal and help you to get the most out of Samba's new billing solution.
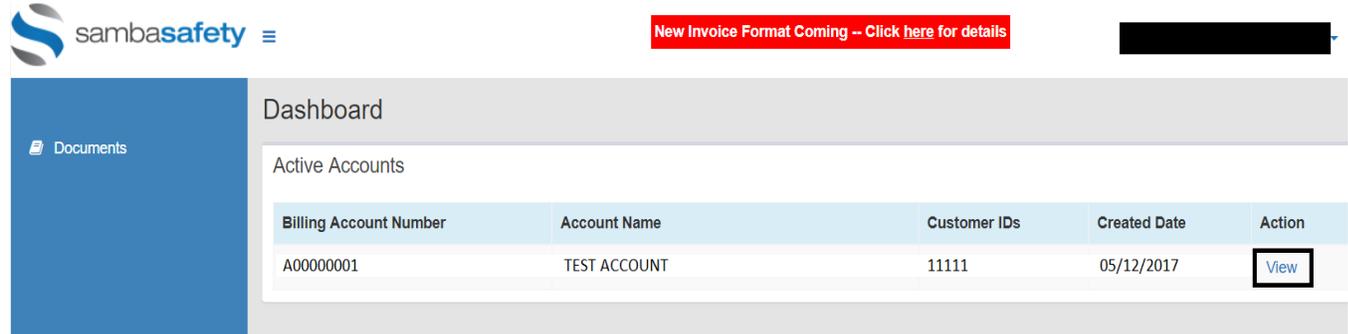
Login Credentials

To sign into the portal, you will need login credentials. An email will be sent to your invoice email address instructing you to click the **Signup** button and enter your **invoice email address, Billing Acct Number**, and create a **password**. Once you have done this, you will receive a verification email. Click the link inside that email, and you will automatically be logged in and have access to the billing portal.

Dashboard

Upon logging into the portal, you will land on the homepage dashboard. From here, you can see details pertaining to all your active billing accounts. For most, this will just be one account. To view more information, click view under the Action column on the right-hand side of the table.
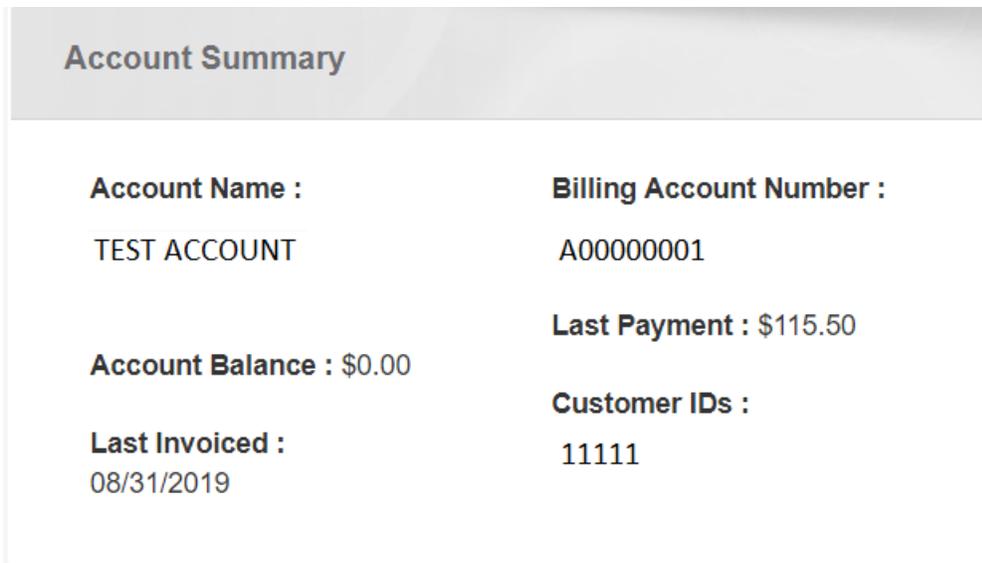

Account Summary

Here you will find all of your account details. You can see your account balance, the last payment amount you made, and date of last invoice. This is a snapshot of your Samba billing details and activity.
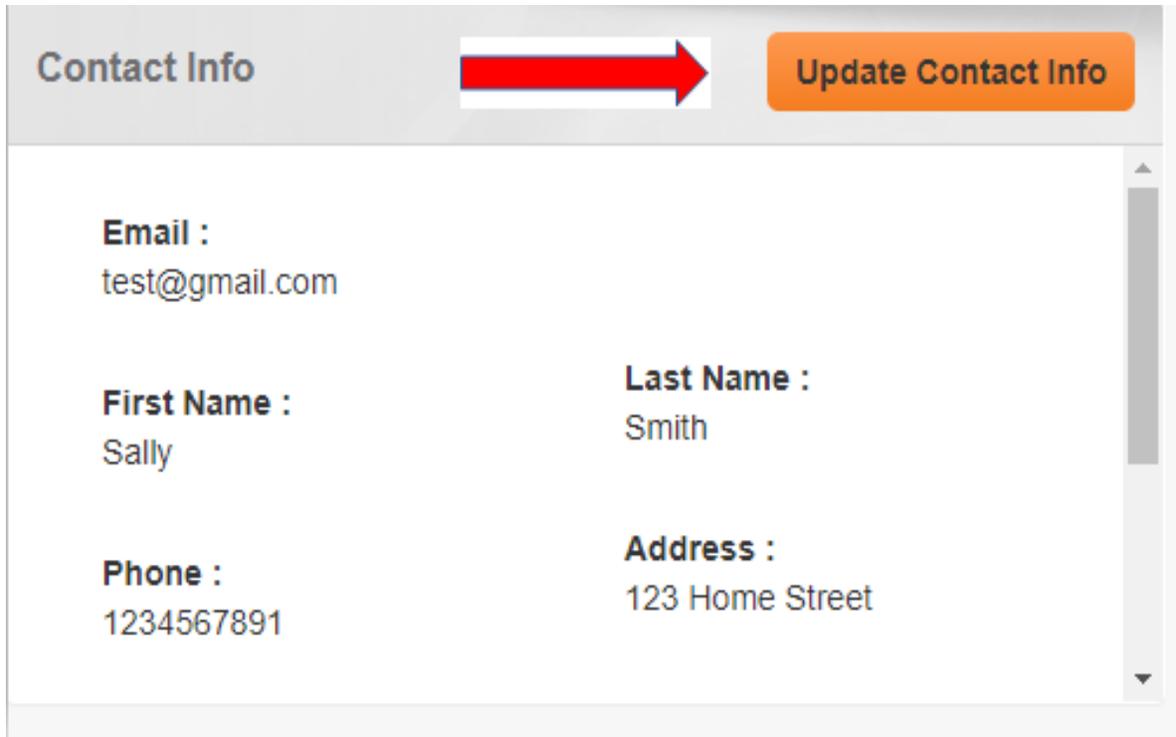
Contact Info

The contact info tab shows al the current contact information in your account. If you wish to update any of your contact info, click the orange **Update Contact Info** button in the top right corner of this section.
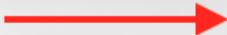

Invoices

The invoice section shows the last six invoices for your account. You can download each invoice as either a PDF or an Excel(CSV) document.

Make a Payment

If you would like to make a payment to your outstanding balance, click the green **Pay Now** in the invoices section.

NOTE: you must select a default payment method before making any payments.

Invoices								Pay Now
Invoice	**Details**	**Invoice #**	**Created Date**	**Due Date**	**Amount**	**Tax**	**Balance**	**Status**
📄	📊	INV00003177	07/27/2017	07/30/2017	$40.00	$0.00	$23.00	Posted

You can apply a partial payment or the full amount to your invoice balance. This screen also displays any credits you have in your account.

Available Credit Balance : $ 0

Invoices #	Amount	Balance
INV00003177	$40.00	$27.00
Total	**$40.00**	**$27.00**

Please enter your payment amount

[   ]

Pay Now

Go Back

Payments

The payments section shows the six most recent payments you have made. It includes payment number, date, amount, and status of each payment made.

Payment Methods

At the bottom of the page you will find your current payment methods. Both credit cards and ACH accounts can be added as a payment type. **However, you must select <u>one</u> payment method to be the default <u>before</u> you can make any payments.** You can switch your default payment method at any time.

Add a Payment Method

To add a new payment method, click the orange **Add New Payment Method** button. You will be able to choose from ACH or CC payment types.

NOTE: You must select at least one payment method as a default before making any payments.

Once you have selected a default payment method, you can make payments inside the portal. You can remove any payment type as long as it is not set as your default payment method.

If you have any questions about the portal, or need assistance, please contact Customer Care at customercare@sambasafety.com.