



sambasafety

Billing Portal User Guide

Version 1.2

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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.

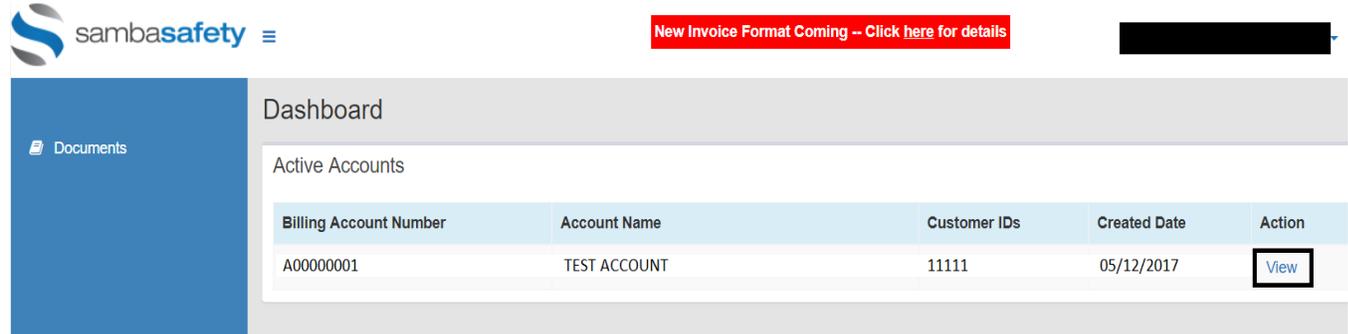
Login Credentials

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.

A screenshot of the SambaSafety login portal. At the top, it says "Welcome to SambaSafety". Below this is a white login form with a shadow. The form contains two input fields: "Username" with the placeholder text "E-mail" and "Password" with the placeholder text "Password". Below the fields is an orange "Login" button. To the right of the "Login" button is a blue "Signup" button, which is highlighted with a red rectangular border. Below the "Signup" button is a blue "Reset Password" link.

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.

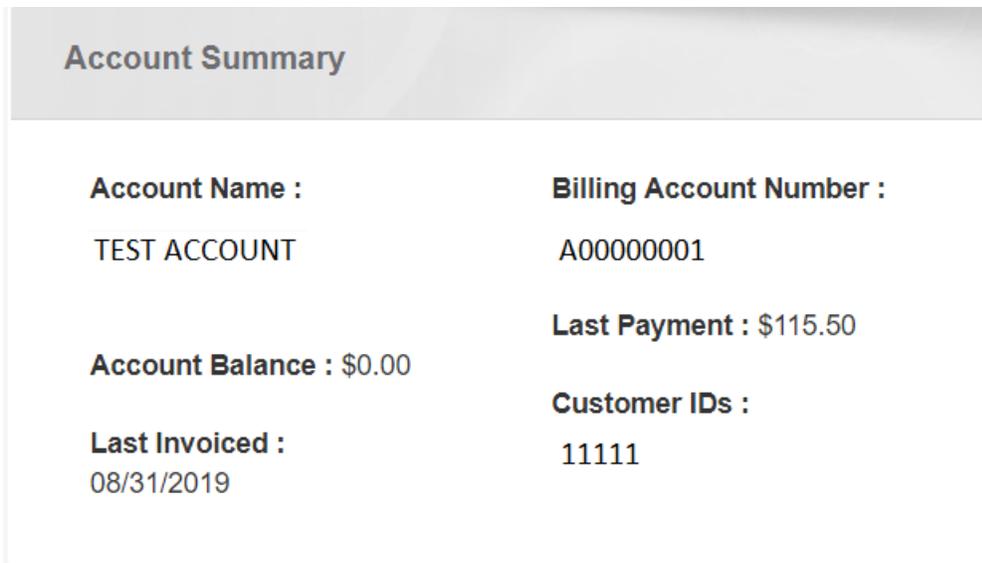


The screenshot shows the SambaSafety dashboard. At the top left is the SambaSafety logo. To its right is a red notification banner that reads "New Invoice Format Coming -- Click here for details". Further right is a blacked-out user profile area. Below the notification is a "Documents" menu icon. The main content area is titled "Dashboard" and contains a section for "Active Accounts". This section features a table with the following data:

Billing Account Number	Account Name	Customer IDs	Created Date	Action
A00000001	TEST ACCOUNT	11111	05/12/2017	View

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.

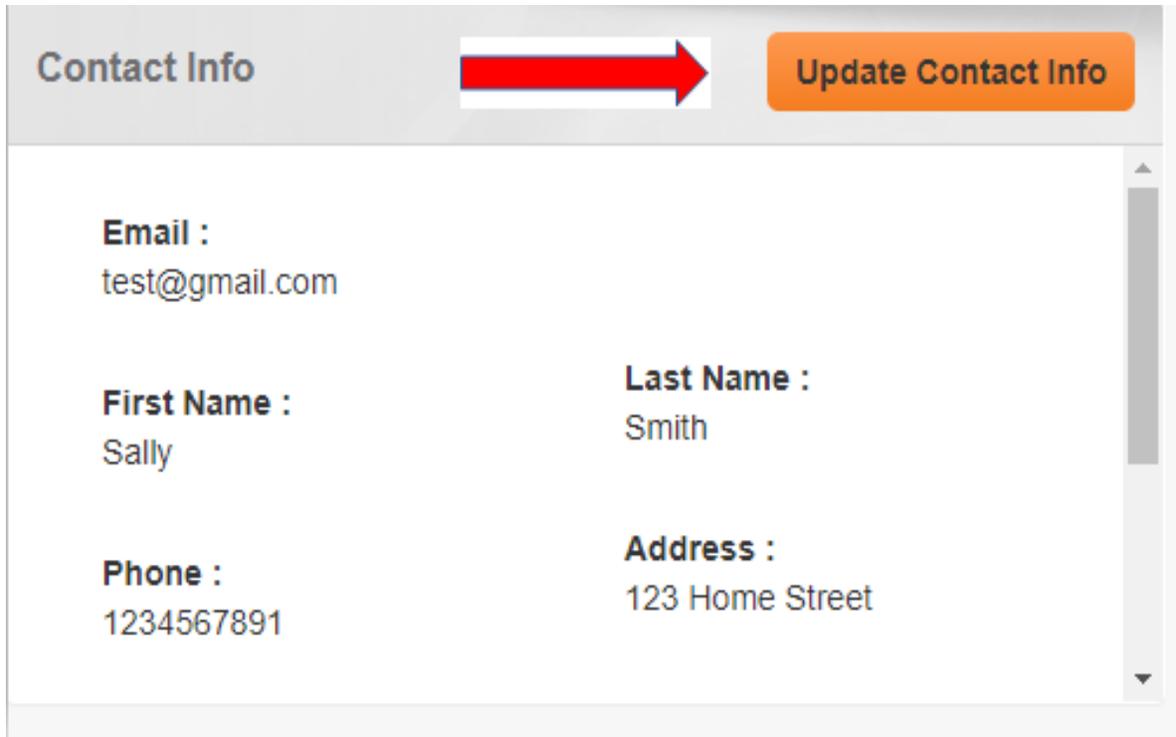


The screenshot shows the "Account Summary" page. It displays the following information:

- Account Name :** TEST ACCOUNT
- Billing Account Number :** A00000001
- Account Balance :** \$0.00
- Last Payment :** \$115.50
- Last Invoiced :** 08/31/2019
- Customer IDs :** 11111

Contact Info

The contact info tab shows all 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.



Contact Info  **Update Contact Info**

Email :
test@gmail.com

First Name :
Sally

Last Name :
Smith

Phone :
1234567891

Address :
123 Home Street

Invoices

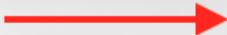
The invoice section shows the last six invoices for your account. You can download each invoice as either a PDF or an Excel(CSV) document.

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 Number	Invoice Number	Reference	Created Date	Amount	Status
P-00073629	INV00219507	1819	09/26/2019	\$115.50	Processed
P-00067882	INV00209381	1799	08/14/2019	\$38.50	Processed
P-00067881	INV00213554	1799	08/14/2019	\$64.00	Processed

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 one payment method to be the default before you can make any payments.** You can switch your default payment method at any time.

Payment Methods Add New Payment Method

Card Authorized [Update](#)

ACH
Acc. No: ***1111
ABA/Routing No: 11111111
Bank/Type: Bank / BusinessChecking
Acc. Name: Test

*** Default Payment Method**

Card Authorized [View](#)

Visa
*****1111
Exp: 2 / 2019
TEST

[Make Default](#) [Remove](#)

Card Authorized [Update](#)

ACH
Acc. No: ***2222
ABA/Routing No: 11111111
Bank/Type: BOA / Checking
Acc. Name: Test BOA

[Make Default](#) [Remove](#)

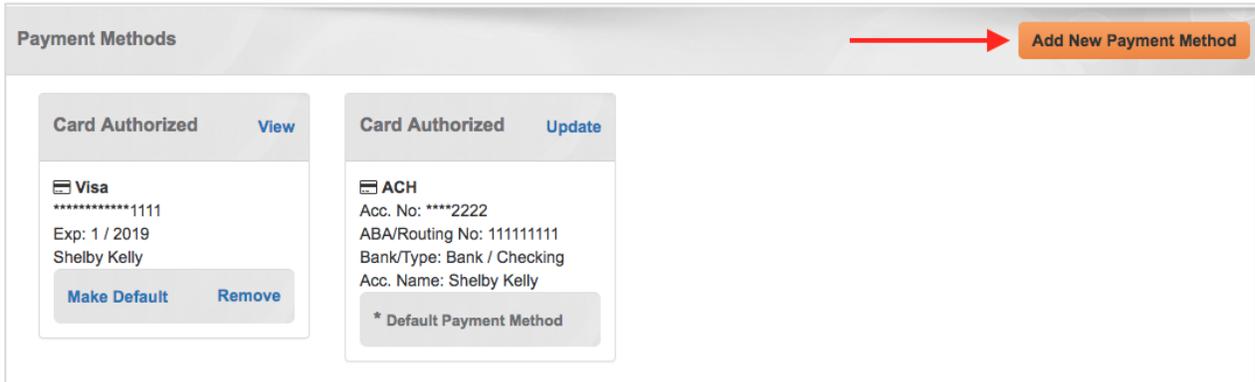
Card Authorized [Update](#)

ACH
Acc. No: *5554
ABA/Routing No: 454545554
Bank/Type: TEST / Checking
Acc. Name: TES

[Make Default](#) [Remove](#)

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.



The screenshot shows a "Payment Methods" interface. At the top right, there is an orange button labeled "Add New Payment Method" with a red arrow pointing to it. Below this, there are two payment method cards. The first card is for a "Card Authorized" (Visa) with a "View" link. The second card is also for a "Card Authorized" (ACH) with an "Update" link. The ACH card is marked as the "Default Payment Method".

Payment Method	Card Type	Card Number	Exp. Date	Cardholder Name	Buttons
Card Authorized	Visa	*****1111	Exp: 1 / 2019	Shelby Kelly	Make Default, Remove
Card Authorized	ACH	Acc. No: ****2222	ABA/Routing No: 111111111	Bank/Type: Bank / Checking Acc. Name: Shelby Kelly	Update, * Default Payment Method

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.