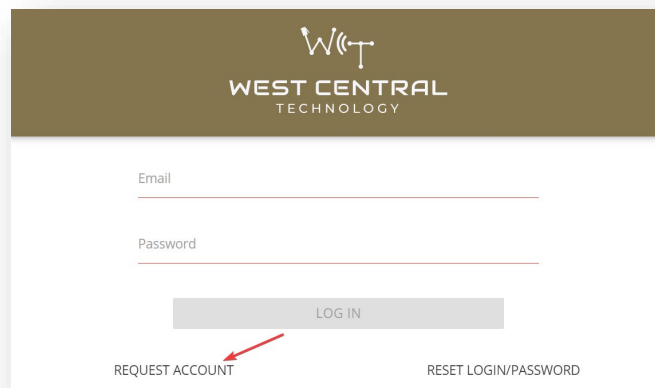


## West Central Technology Billing Portal Welcome Guide

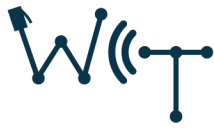
West Central Technology is excited to offer a new billing portal! This portal will offer you the ability to view your invoices, pay them online with a credit card or ACH transaction, setup Auto Pay and more! You can get there by going to <https://billing.wcthelp.com>

### Registration

To get started, we will need an account on the billing portal. If you do not yet have an account, please click “Request Account”



The screenshot shows the West Central Technology login page. At the top, there is a dark brown header with the WCT logo and the text "WEST CENTRAL TECHNOLOGY". Below the header, there are two input fields: "Email" and "Password". A grey "LOG IN" button is positioned below the password field. At the bottom of the page, there are two links: "REQUEST ACCOUNT" and "RESET LOGIN/PASSWORD". A red arrow points to the "REQUEST ACCOUNT" link.



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Once you click request access, it will prompt you for some information. Please fill out this form completely and accurately for a timely account creation. Once you have filled out the form, press "Request Account". The system will then alert our team to get you setup with access to your Company's invoices.

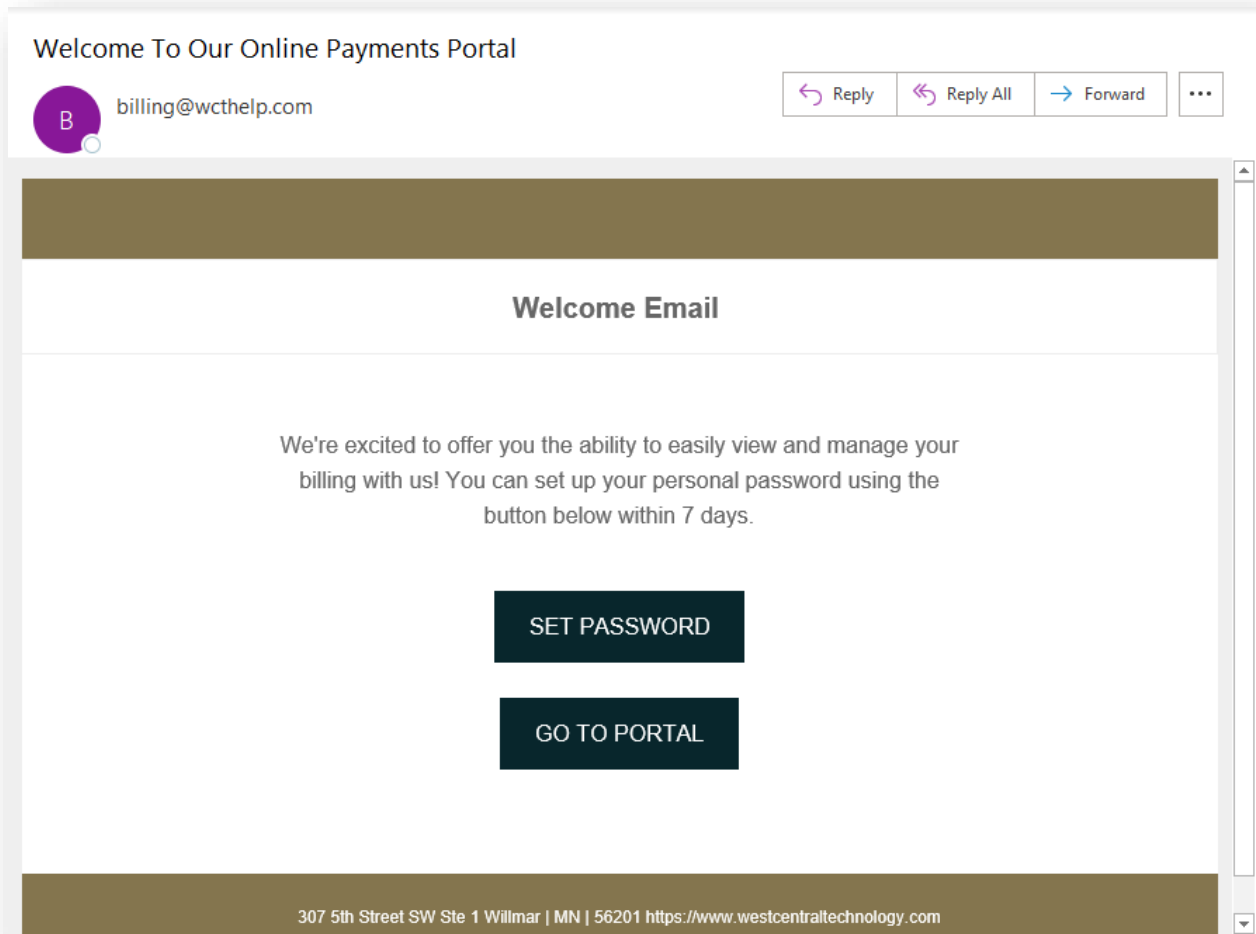
The screenshot shows a web form for requesting an account. At the top, there is a dark brown header with the West Central Technology logo and name. Below the header, the form fields are as follows:

- Name:** John Doe
- Company:** John Doe Enterprises
- Phone:** 3204417050
- Email:** john.doe@wcthelp.com

Below the email field is a reCAPTCHA verification box with a green checkmark and the text "I'm not a robot". To the right of the reCAPTCHA box is a small icon and the text "reCAPTCHA Privacy - Terms".

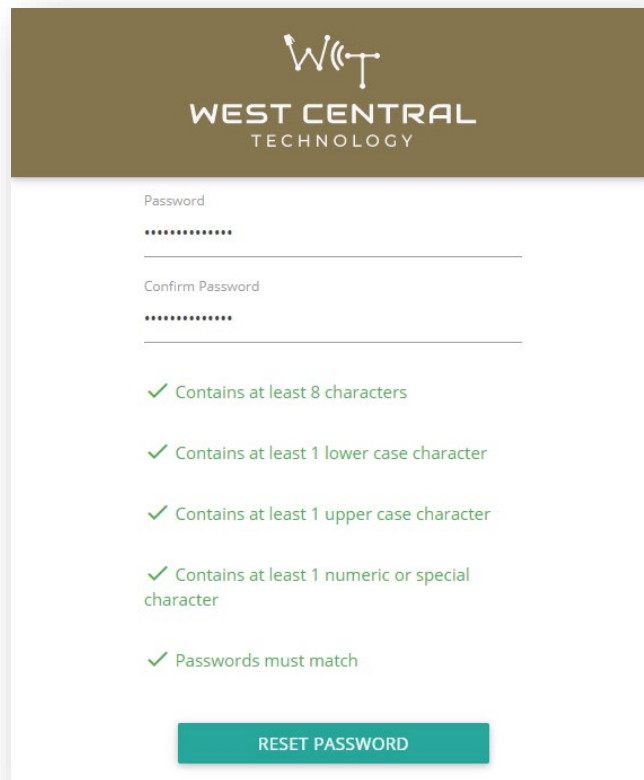
At the bottom of the form is a dark blue button labeled "REQUEST ACCOUNT" and a link labeled "← BACK".

Once your account has been created, you will receive a welcome email as shown below to set your password.



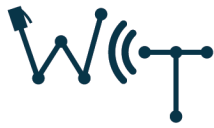
Please click on “Set Password” to setup your password for the first time.

After clicking “Set Password”, it will bring you to a reset password page. Select a password that meets the complexity requirements listed, and select “Reset Password”



The screenshot shows a password reset form with the following elements:

- Header: WEST CENTRAL TECHNOLOGY logo and name.
- Form fields: "Password" and "Confirm Password", both masked with dots.
- Validation list:
  - ✓ Contains at least 8 characters
  - ✓ Contains at least 1 lower case character
  - ✓ Contains at least 1 upper case character
  - ✓ Contains at least 1 numeric or special character
  - ✓ Passwords must match
- Button: A teal button labeled "RESET PASSWORD".



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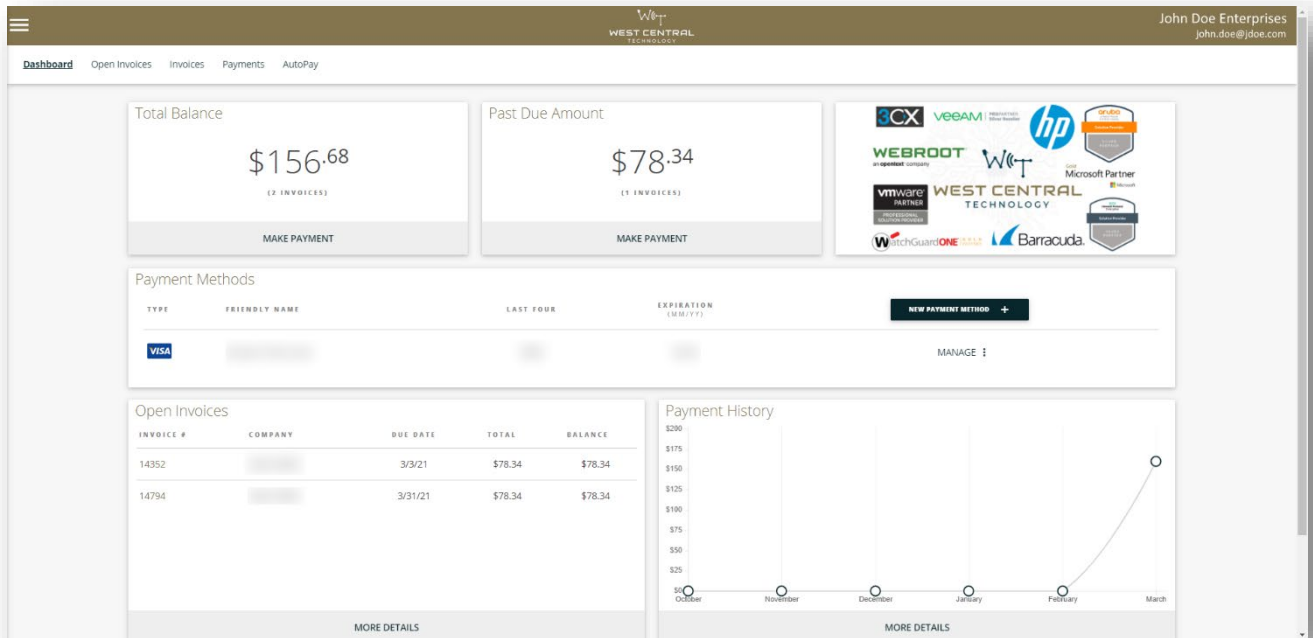
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Upon logging in for the first time, it will prompt you to setup 2 Factor Authentication. We highly recommend setting up 2 Factor Authentication for your account to ensure security of your account. The screen will look like this. Please enter a mobile number in the phone number field and press send. You will then get a Text message with a code to enter. Please enter that code, and press "Enter".

The screenshot shows a mobile application interface for West Central Technology. At the top, there is a header with the company logo and name. Below the header, a message explains the purpose of 2FA: "To further improve the security and privacy of your account, please provide a phone number to receive your one-time-use security code via SMS text message. This phone number will be used to verify your identity at login each time you access your account." Below this message is a text input field labeled "+1 Phone Number" with a red underline. Underneath the input field are two buttons: a brown "SEND" button and a dark blue "SKIP FOR NOW" button. Below the buttons, another message says: "Enter the code that was sent to the phone you entered above in the confirmation box below." This is followed by a text input field labeled "Verification Code" with a red underline, and a grey "ENTER" button below it.

Once you have been logged in, it will redirect you to your dashboard as shown below.



**John Doe Enterprises**  
john.doe@jdoe.com

**Total Balance**  
\$156.68  
(2 INVOICES)  
MAKE PAYMENT

**Past Due Amount**  
\$78.34  
(1 INVOICES)  
MAKE PAYMENT

**Payment Methods**

TYPE	FRIENDLY NAME	LAST FOUR	EXPIRATION (MM/YY)	MANAGE
VISA				MANAGE

**Open Invoices**

INVOICE #	COMPANY	DUE DATE	TOTAL	BALANCE
14352		3/3/21	\$78.34	\$78.34
14794		3/31/21	\$78.34	\$78.34

**Payment History**

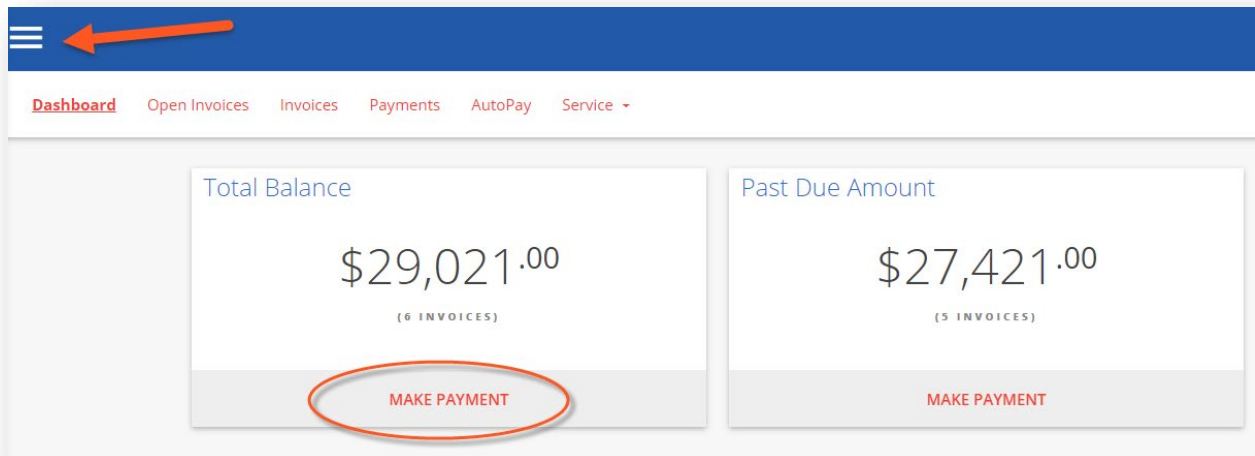
Line graph showing payment history from October to March. The y-axis represents the amount paid, ranging from \$0 to \$200. The x-axis shows months from October to March. The graph shows a sharp increase in payment in March, reaching approximately \$175.

On this portal, you have several options, from viewing your invoices to paying them online and setting up Auto Pay.

## Dashboard

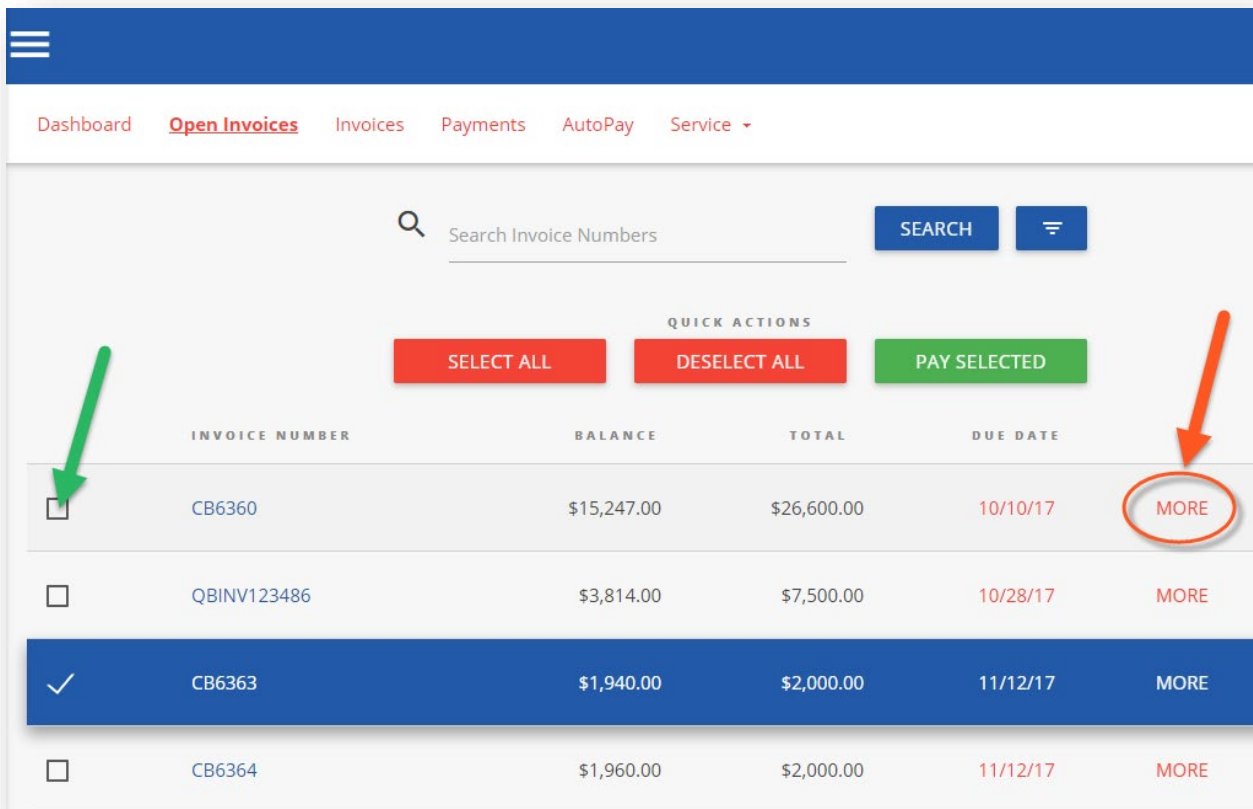
This is the first page you will see when logging in, known as the “Dashboard”. From here, you may quickly view invoices and make payments using the prominent tiles. The tiles will link to the same “Open Invoices” section in the portal.

Using the hamburger menu (3 bars), you may change your password, logout, or “Change Companies” if applicable.



## Open Invoices

All currently open invoices in the system are shown here. If you need to sort and filter, you can do this with the hamburger menu (3 bars) next to the search box. If you wish to pay an invoice, select the item(s) you wish to pay, and click "Pay Selected"



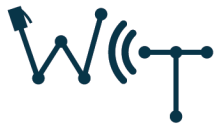
Dashboard **Open Invoices** Invoices Payments AutoPay Service ▾

Search Invoice Numbers





**QUICK ACTIONS**

	INVOICE NUMBER	BALANCE	TOTAL	DUE DATE	
<input type="checkbox"/>	CB6360	\$15,247.00	\$26,600.00	10/10/17	<b>MORE</b>
<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



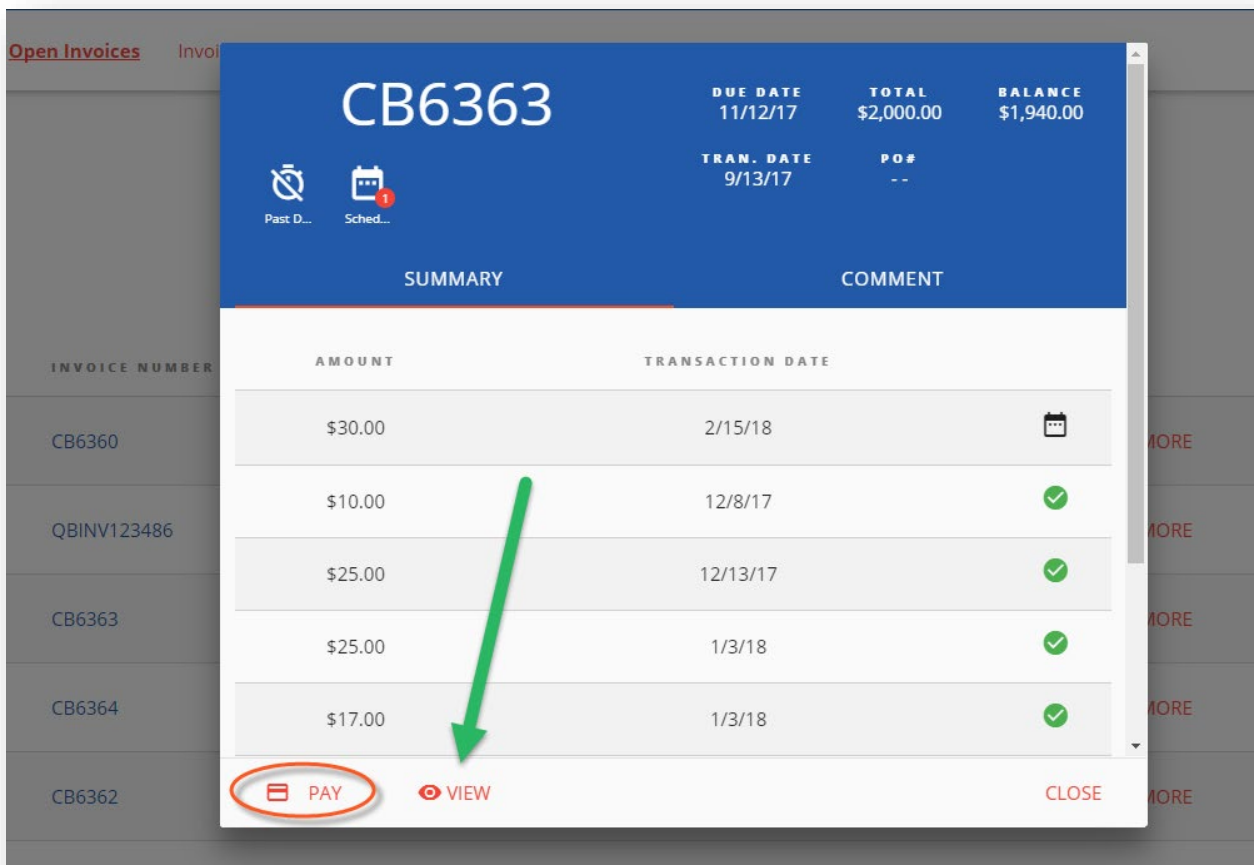


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Clicking “More” on any invoice will display a details window.

You can click “View” to view the invoice, which will open in a new tab in your browser window. You may print / save the PDF as desired





**Open Invoices** Invoic






## CB6363



**DUE DATE** 11/12/17    **TOTAL** \$2,000.00    **BALANCE** \$1,940.00

**TRAN. DATE** 9/13/17    **PO#** --

 Past D...     Sched...

**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	

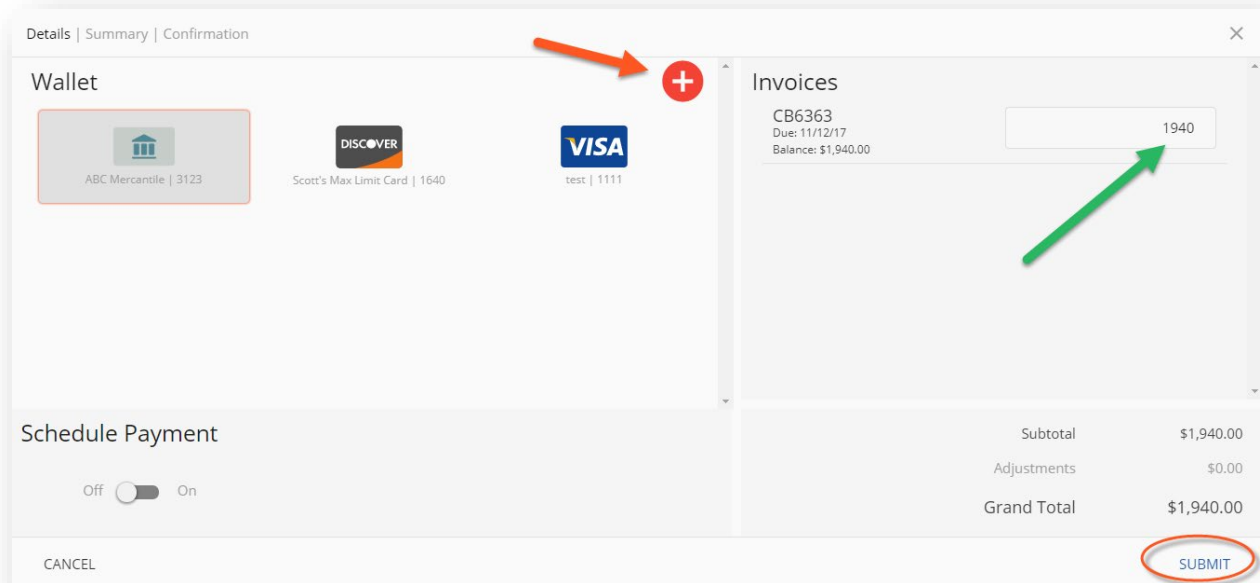
 **PAY**     **VIEW**    **CLOSE**

## To Process a Payment

Select the checkbox of one (or multiple) invoice(s). Click “Pay Selected”

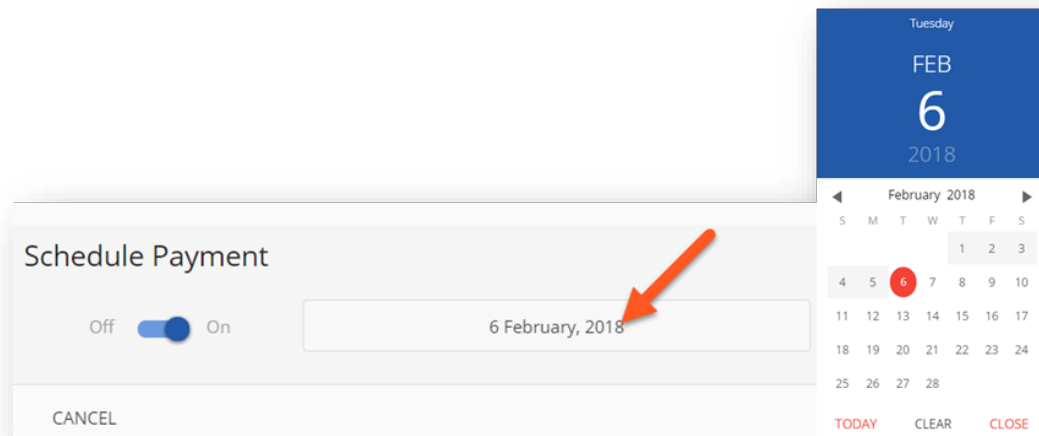


A dialog will appear, select a payment method on file, or add a new entry. Partial payment amounts can be entered in the top right corner. You have the option of splitting payments up with multiple payment methods, if desired.

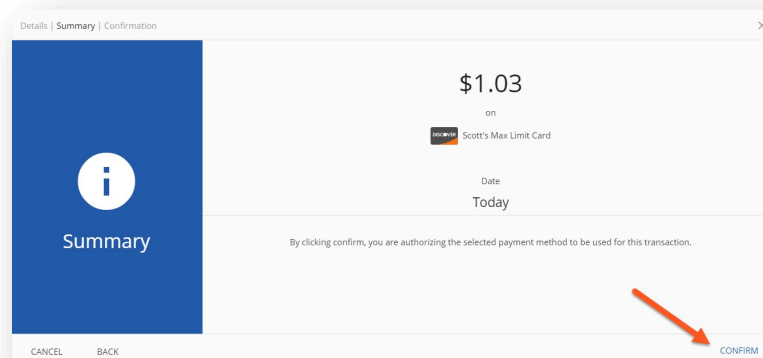


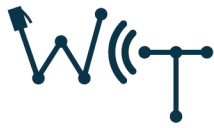
## Advanced Payment Methods

Selecting the “Schedule Payment” switch to “ON” offers the ability to pick a specific payment date, using the date picker. This is **NOT** setting up Auto Pay, but rather just scheduling a one time payment for the future.







Clicking “Submit” will give you a chance to review your actions.

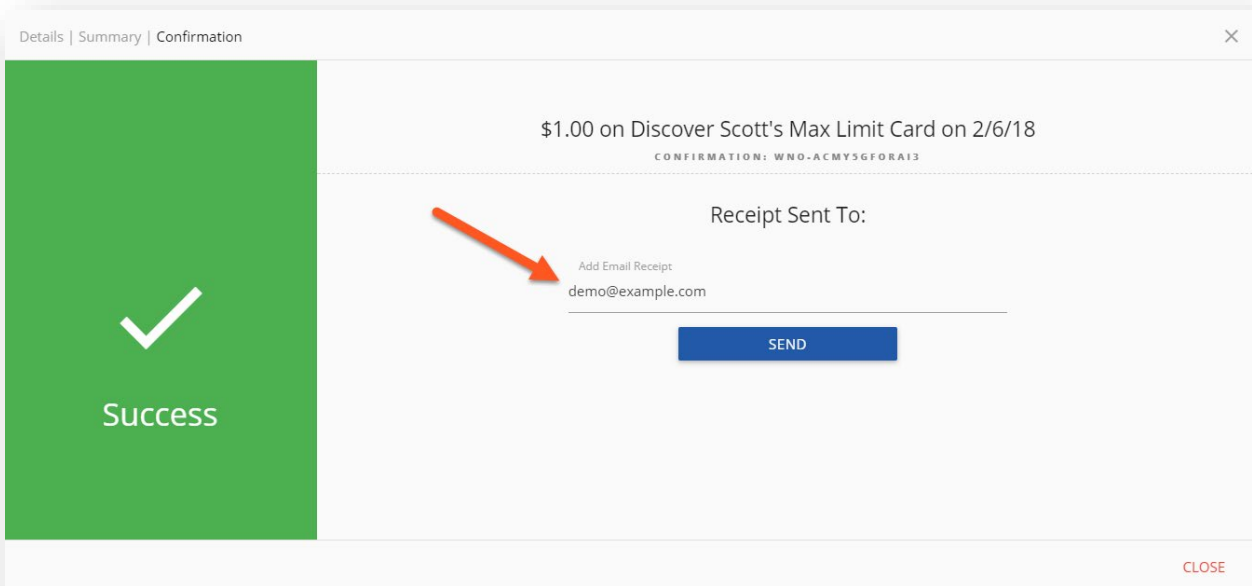


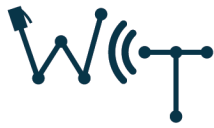


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Clicking “CONFIRM” will display a payment success or failure screen. An email receipt will be sent to your login email address. You may send any additional receipts using the “Add Email Receipt” field. If the payment is scheduled for the future, the receipt will show the scheduled payment date.

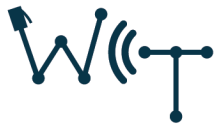




## Invoice History

Click on the “Invoices” menu option. Click “MORE” on previously issued and old 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.

INVOICE NUMBER	BALANCE	TOTAL	DUE DATE	MORE
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



## Payments

In the payments section, you can view all currently pending, future scheduled (including Auto Pay) and past payments.

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	

## Auto Pay

Under AutoPay, Click “NEW” to setup a new AutoPay. Clicking on “NEW” will reveal several options. Configure these rules as you desire. With these rules, you have a wide variety of rules to determine what invoices will be paid with AutoPay. If you wish to auto pay any invoices you receive, set it to “Balance is greater than 1”

- 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!