

SedonaWeb Invoices, Payments, Credit Cards, and Bank Accounts

Last Modified on 07/10/2023 1:52 pm EDT

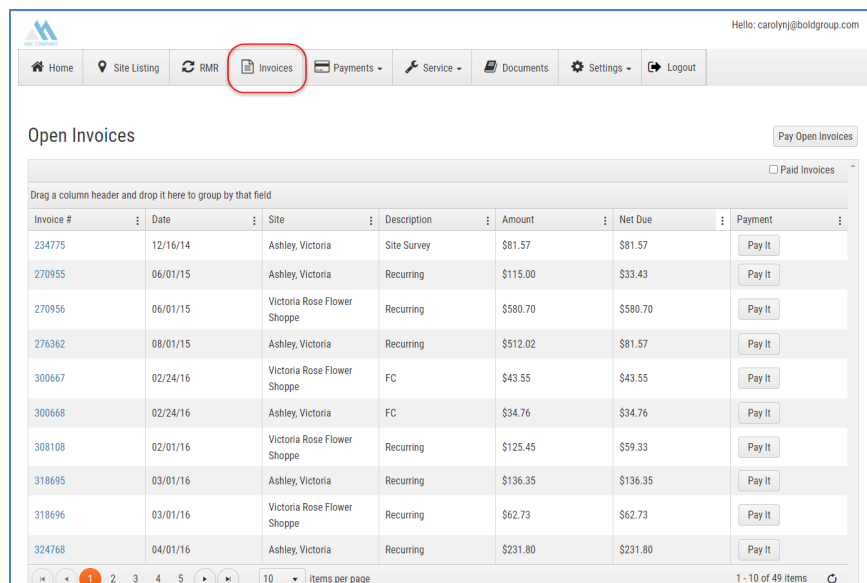
Invoices Tab

Clicking on the Invoices Tab will display a listing of all invoices with an open balance. Invoices are listed beginning with the oldest invoice first. The customer has the ability to drill down into the details of each individual invoice. If checking the box "Paid Invoices", this listing will include all paid and open invoices for the customer.

If the customer has a credit card or bank account on file, they may click on the Pay It button on any invoice to mark for payment, or if they want to pay all of their invoices, they can click on the Pay Open Invoices button.

Pay It and Pay Open Invoices

These two options are only available to companies who have set up an account with Forte (merchant bank).



Open Invoices Pay Open Invoices

Paid Invoices

Drag a column header and drop it here to group by that field

Invoice #	Date	Site	Description	Amount	Net Due	Payment
234775	12/16/14	Ashley, Victoria	Site Survey	\$81.57	\$81.57	Pay It
270955	06/01/15	Ashley, Victoria	Recurring	\$115.00	\$33.43	Pay It
270956	06/01/15	Victoria Rose Flower Shoppe	Recurring	\$580.70	\$580.70	Pay It
276362	08/01/15	Ashley, Victoria	Recurring	\$512.02	\$81.57	Pay It
300667	02/24/16	Victoria Rose Flower Shoppe	FC	\$43.55	\$43.55	Pay It
300668	02/24/16	Ashley, Victoria	FC	\$34.76	\$34.76	Pay It
308108	02/01/16	Victoria Rose Flower Shoppe	Recurring	\$125.45	\$59.33	Pay It
318695	03/01/16	Ashley, Victoria	Recurring	\$136.35	\$136.35	Pay It
318696	03/01/16	Victoria Rose Flower Shoppe	Recurring	\$62.73	\$62.73	Pay It
324768	04/01/16	Ashley, Victoria	Recurring	\$231.80	\$231.80	Pay It

1 - 10 of 49 items

Include Paid Invoices

If checking the box "Paid Invoices", both paid and unpaid invoices will be displayed in the listing beginning with the oldest invoice first. For invoices that have been paid, in the Payment column, text will be displayed with the date the invoice was completely paid.

Open Invoices

Pay Open Invoices

Paid Invoices

Drag a column header and drop it here to group by that field

Invoice #	Date	Site	Description	Amount	Net Due	Payment
270955	06/01/15	Ashley, Victoria	Recurring	\$115.00	\$33.43	Pay It
270956	06/01/15	Victoria Rose Flower Shoppe	Recurring	\$580.70	\$580.70	Pay It
276362	08/01/15	Ashley, Victoria	Recurring	\$512.02	\$81.57	Pay It
276363	08/01/15	Victoria Rose Flower Shoppe	Recurring	\$628.56	\$0.00	Paid on Jun 08 2017

Invoice Details

From the Invoice listing, click on an invoice number link to display the invoice details. When finished viewing the invoice details, click on the Back button to return to the Invoice listing.

Open Invoices

Pay Open Invoices

Paid Invoices

Drag a column header and drop it here to group by that field

Invoice #	Date	Site	Description	Amount	Net Due	Payment
324769	04/01/16	Victoria Rose Flower Shoppe	Recurring	\$62.73	\$62.73	Pay It
334611	06/01/16	Ashley, Victoria	Equipment Sales	\$417.20	\$417.20	Pay It
334612	06/01/16	Victoria Rose Flower Shoppe	Equipment Sales	\$125.45	\$125.45	Pay It
341130	07/19/16	Ashley, Victoria	Service Call	\$358.89	\$358.89	Pay It

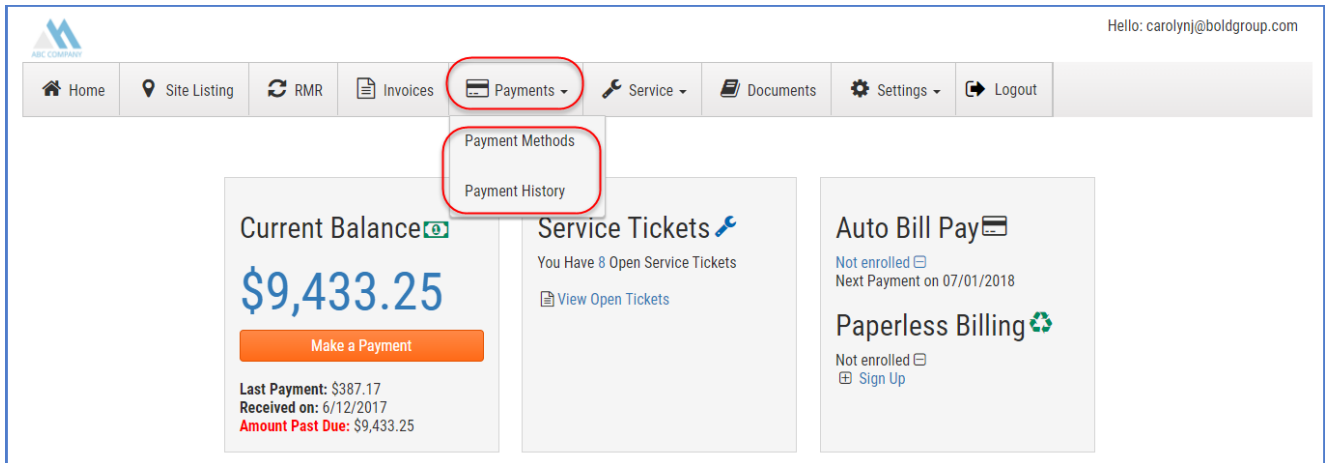
Payments Tab

When clicking on the Payments Tab, two options are available:

Payment Methods

- Displays a listing of credit cards and bank accounts on file
- Add a new credit card or bank account
- Edit or delete a credit card or bank account

Payment History – Displays a listing of all payments made with a credit card or bank account.



Payment Methods

When clicking on the Payment Methods option from the Payments tab, a listing of all credit cards and bank accounts on file for the customer will be displayed.

ABC COMPANY

Hello: carolynj@boldgroup.com

Home Sub Account Site Listing RMR Invoices **Payments** Service Documents Settings Logout

Credit Cards [New Credit Card](#)

Drag a column header and drop it here to group by that field

Account Name	Last Four Digits	Card Type	Valid Thru	Auto Pay	Customer Name	
	1111	Visa	09 / 21	No	Lyons, Francesca	<input type="checkbox"/> <input type="checkbox"/>
PETER FOURNER	1111	Visa	09 / 22	No	Lyons, Francesca	<input type="checkbox"/> <input type="checkbox"/>

10 items per page 1 - 2 of 2 items

Bank Accounts [New Bank Account](#)

Drag a column header and drop it here to group by that column





Account Name	Last Four Digits	Bank	Account Type	Customer Name	Auto Pay	
S/3	1234	123123123	Checking	Lyons, Francesca	No	<input type="checkbox"/> <input type="checkbox"/>

10 items per page 1 - 1 of 1 items



Edit a Credit Card

When clicking on the edit icon to the right of a credit card, the customer is able to change the billing address for the credit card and if not already flagged for auto-pay, can check the “Use Card for Auto Bill Payment” checkbox. If selecting the “Use Card for Auto Bill Payment” checkbox, any future recurring invoices will use the credit card for payment.

The screenshot shows the top navigation bar of the ABC COMPANY website. The 'Payments' menu item is highlighted with a red circle. Below the navigation bar, there are two sections: 'Credit Cards' and 'Bank Accounts'. The 'Credit Cards' section contains a table with the following data:

Account Name	Last Four Digits	Card Type	Valid Till	Auto Pay	Customer Name	
	1111	Visa	09 / 21	No	Lyons, Francesca	 
PETER FOURNIER	1111	Visa	09 / 22	No	Lyons, Francesca	 

The 'Bank Accounts' section contains a table with the following data:

Account Name	Last Four Digits	Bank	Account Type	Customer Name	Auto Pay	
5/3	1234	123123123	Checking	Lyons, Francesca	No	 

When finished editing the credit card information, click the Submit button to save the changes. To exit the form without making any changes, click the Back to Payment Methods button.

The 'Edit Credit Card' form displays the following information:

- Card Type: visa
- Card Number: 1111
- Name on Card: PETER FOURNIER
- Expiration Date: 09 / 22
- Billing Street Address: 63 Coleman Road, ...
- Postal Code: 48375
- Use card for auto bill payment

At the top right of the form, there are two buttons: 'Submit' and 'Back to Payment Methods'.

Delete a Credit Card

When clicking on the delete icon to the right of a credit card, the customer is able to delete a credit card on file. Make certain this is what you want to do – once you click on the Delete button, there is no way to undo this. If you do not want to delete the credit card, click on the Back to Payment Methods button.

The 'Delete Credit Card' form asks: 'Are you sure you want to delete this?' and displays the following information:

- Card Type: VISA
- LastFourDigits: 1111
- Expiration Date: 09 / 23
- Billing Street Address: 63 Coleman Road, ...
- Postal Code: 48375

At the top right of the form, there are two buttons: 'Delete' and 'Back to Payment Methods'.

Edit a Bank Account

When clicking on the edit icon to the right of a bank account, the customer is able to change the name on the bank account and if not already flagged for auto-pay, can check the “Use this for Auto Bill Payment” checkbox. If selecting the “Use this for Auto Bill Payment” checkbox, any future recurring invoices will use the bank account for payment.

Apps How to import data... The US50 - Cities a... RD Web Access-Dat... New Tab TFS Workspace - Tractio... SO Docs on BoldU Inbox (133) - caroly... K&J Magnetics: Blo... Hello: carolynj@boldgroup.com

Home Sub Account Site Listing RMR Invoices **Payments** Service Documents Settings Logout

Credit Cards

Drag a column header and drop it here to group by that field

Account Name	Last Four Digits	Card Type	Valid Till	Auto Pay	Customer Name	
PETER FOURNIER	1111	Visa	09 / 22	No	Lyons, Francesca	

10 items per page 1 - 1 of 1 items

Bank Accounts

Drag a column header and drop it here to group by that field

Account Name	Last Four Digits	Bank	Account Type	Customer Name	Auto Pay	
Francesca Lyons	1234	123123123	Checking	Lyons, Francesca	No	

10 items per page 1 - 1 of 1 items

When finished editing the bank account information, click the Submit button to save the changes. To exit the form without making any changes, click the Back to Payment Methods button.

Edit Bank Account Submit Back to Payment Methods

Last Four Digits 1234

Name on Account

Check to use this account for all future recurring invoices Use this for auto bill payment

Delete a Bank Account

When clicking on the delete icon to the right of a bank account, the customer is able to delete a bank account on file. Make certain this is what you want to do – once you click on the Delete button, there is no way to undo this. If you do not want to delete the bank account, click on the Back to Payment Methods button.

Delete Bank Account Delete Back to Payment Methods

Are you sure you want to delete this?

RoutingNumber 123123123

Last Four 1234

Description 123123123

Name on Account Francesca Lyons

Payment History

When clicking on the Payment History option from the Payments tab, a listing of all credit card and bank account transactions for the customer will be displayed.



- Home
- Site Listing
- RMR
- Invoices
- Payments
- Service
- Documents
- Settings
- Logout

Payment Methods

Payment History

Current Balance

\$9,433.25

Make a Payment

Last Payment: \$387.17
Received on: 6/12/2017
Amount Past Due: \$9,433.25

Service Tickets

You Have 8 Open Service Tickets

View Open Tickets

Auto Bill Pay

Not enrolled
Next Payment on 07/01/2018

Paperless Billing

Not enrolled
Sign Up

Payment History

Drag a column header and drop it here to group by that field

Name	Date	Payment Method	Amount	Reference	Memo	Approval Code
Lynn, Francesca	Mon Sep 09 2019	Credit Card	\$7.50	300625		

10 items per page 1-1 of 1 Items