User Guide

Welcome to Invoice Central! Now that you've created your account, you can immediately begin taking advantage of Invoice Central's useful features. Click on a topic in the Table of Contents below to learn more.

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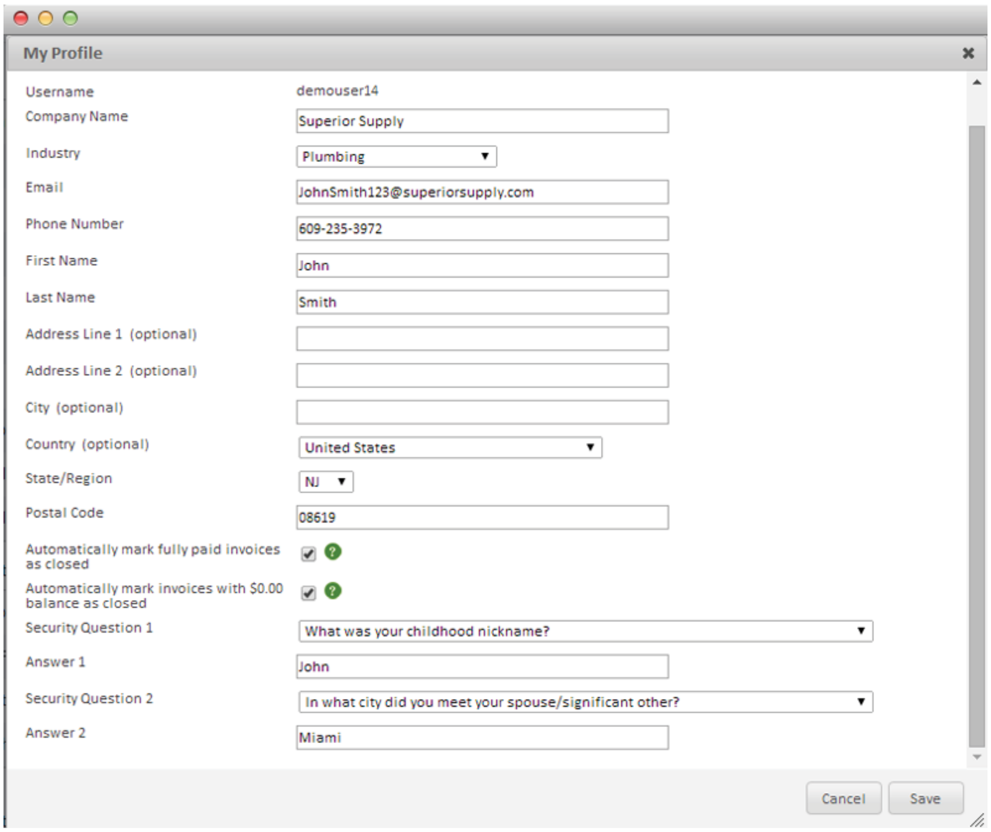
Need Help? Contact Us! help@invoicecentral.com (888) 349-7434

Manage General Account Settings

To manage your general account settings, click on the *Profile* tab. To edit your settings, click the *Edit* button on the upper-right hand side of the screen, directly above your settings display. A window containing all of your profile information will appear. Here, you can edit personal information, including your main email address, as well as change your security questions and answers. You can also specify whether or not you would like to automatically mark fully paid invoices, and invoices with a $0.00 balance, as closed.



FAQ

What is the difference between closing "fully paid invoices" vs. "invoices with a $0.00 balance?"

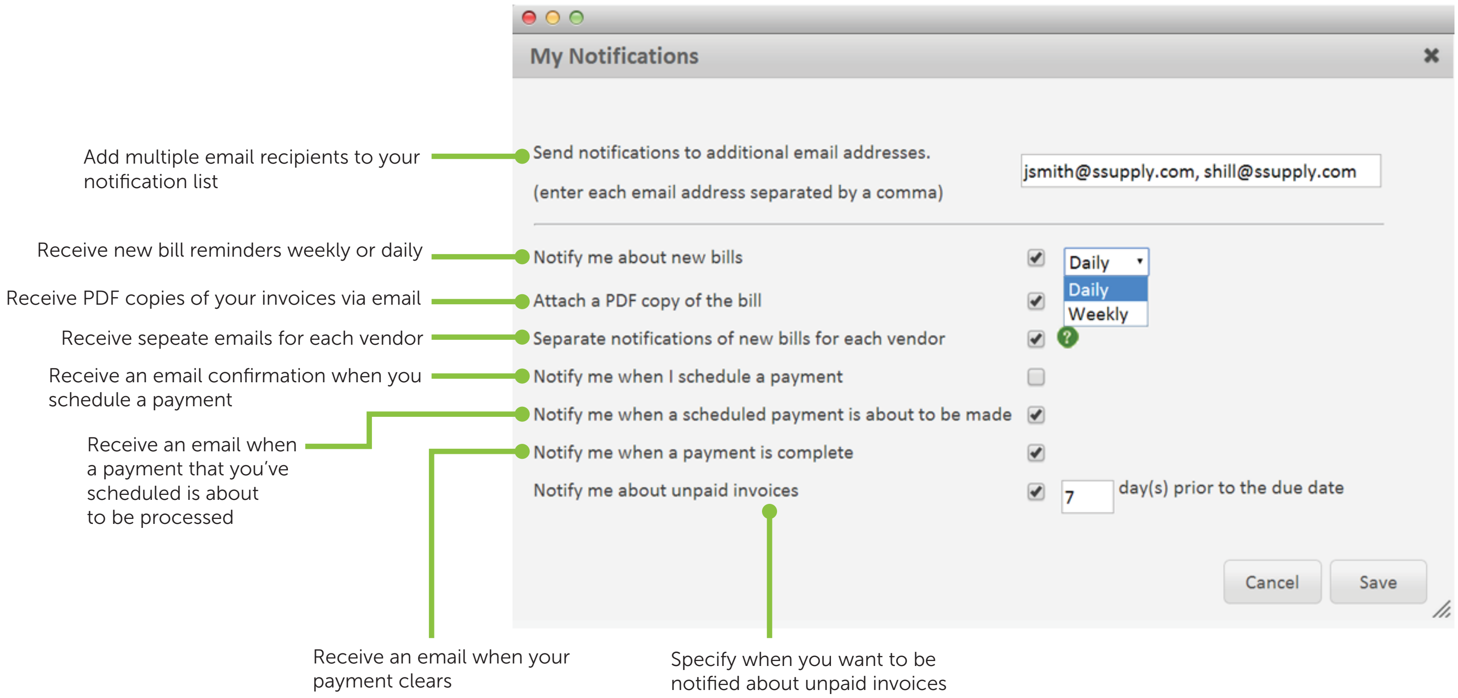
If you choose to automatically close fully paid invoices, your invoices that are paid *directly through Invoice Central* will be marked as *closed* and automatically moved to the *Closed* tab.

If you choose to automatically close invoices with a $0.00 balance, invoices that are paid *outside of Invoice Central* (i.e. check by mail), will be marked as *closed* and moved to the closed tab once your vendor(s) alert(s) us that they have a $0.00 balance.

Please note that some vendors do not provide us with an updated balance due for each invoice if you pay outside of Invoice Central. Vendors who do not provide us with an updated balance due have a ? next to the *Amount Due*.

Manage Email Notification Settings

In the *Profile* tab, click the *Edit* button on the upper-right hand side of your screen, directly above your notifications display. A window containing your notification settings will appear. From here, you can customize your notification settings based on your preferences.

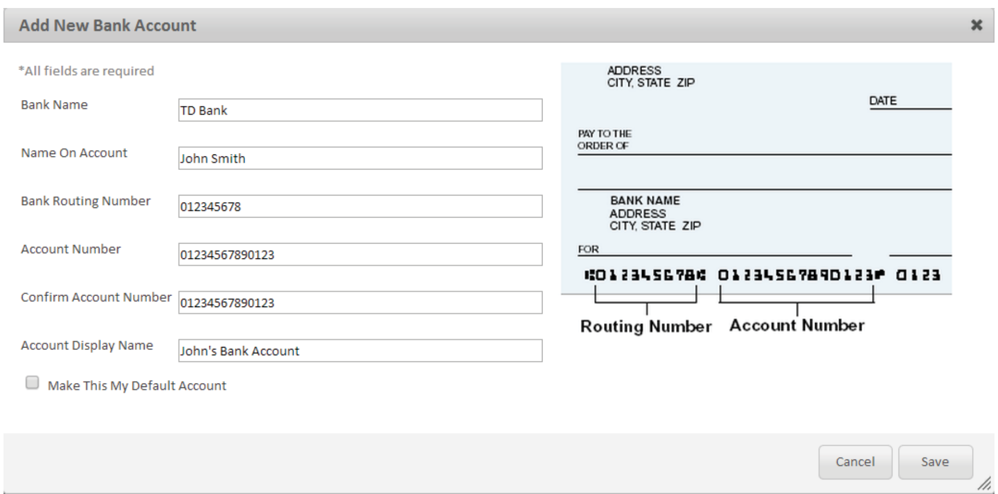


Helpful Tip › Set your *Notify me about new bills* preference to "Daily" to ensure that you never miss an invoice or statement.

Add Payment Accounts

In the *Profile* tab, scroll down to the *Payment Accounts* section, and click on *Add Bank Account* or *Add Credit Card*. A window will appear prompting you to type in your banking or credit card information, depending on which account type you've selected. If you are adding a new bank account, you will need the full name on the account, a bank routing number, and an account number. If you are adding a credit card account, you will need a card number, an expiration date, the name on the credit card and a billing address. If you would like to make the account you are adding the default account for future payments, click on the checkbox titled *Make This My Default Account*. After you've completed the required fields, click *Save*.

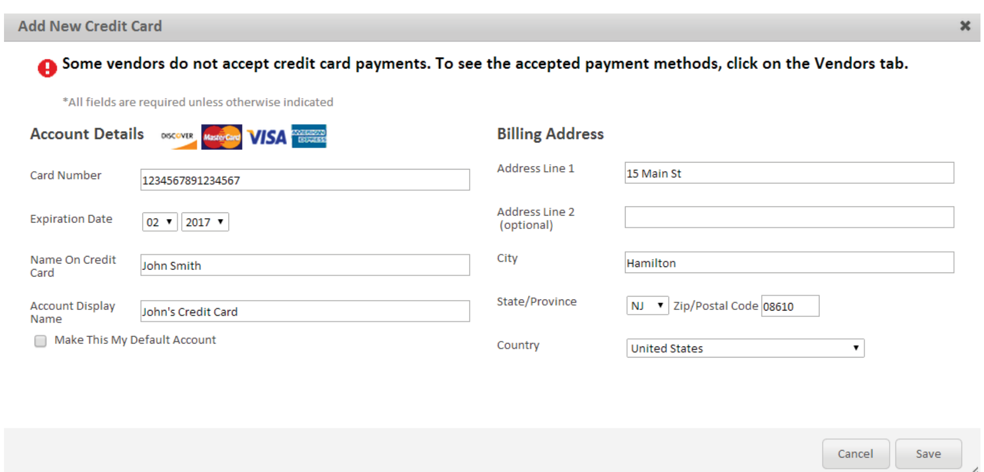
Adding Bank Accounts



Note:

Your credit card information is validated automatically and as soon as you add a credit card account to your profile. Bank account information, however, is only validated once a payment is made. When adding a bank account to your profile, double check to ensure that all of your information is accurate.

Adding Credit Card Accounts



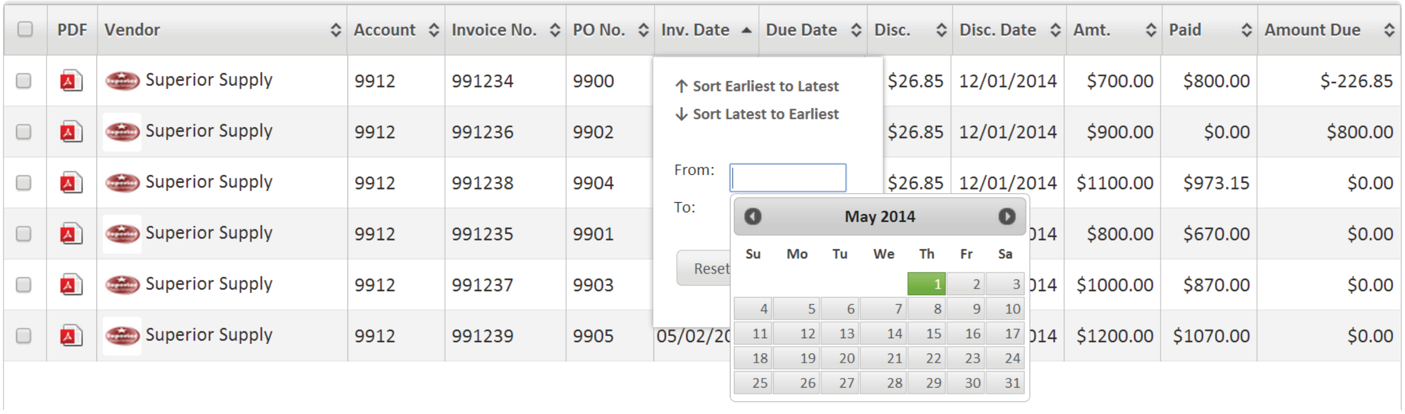
Note:

Adding and saving a bank or credit card account is optional. You will be prompted to enter your credit card or bank account information when paying an invoice or statement, where you can choose whether or not you would like to save your information.

Make Payments

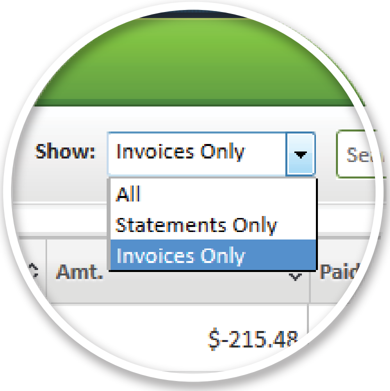
Introduction

You'll be making payments through the *Open* tab, which is also your default homepage when you log in. Your open invoices will be listed, along with all pertinent information like your account number, invoice number, amount due, etc. You have the ability to sort your open invoices based on any one of these columns. To do so, simply click on the column header you would like to sort your open invoices by. In the example below, we've chosen to sort open invoices by *Invoice Date.* When you click on the *Inv. Date* header, a pop-up menu will prompt you to choose a *From* and *To* date, which also allows you to select dates from a calendar that appears when you click into the corresponding field. You may also choose to simply sort your open invoices by earliest to latest, or vice versa. Once you've selected your filter, click *Apply*.



New Feature:

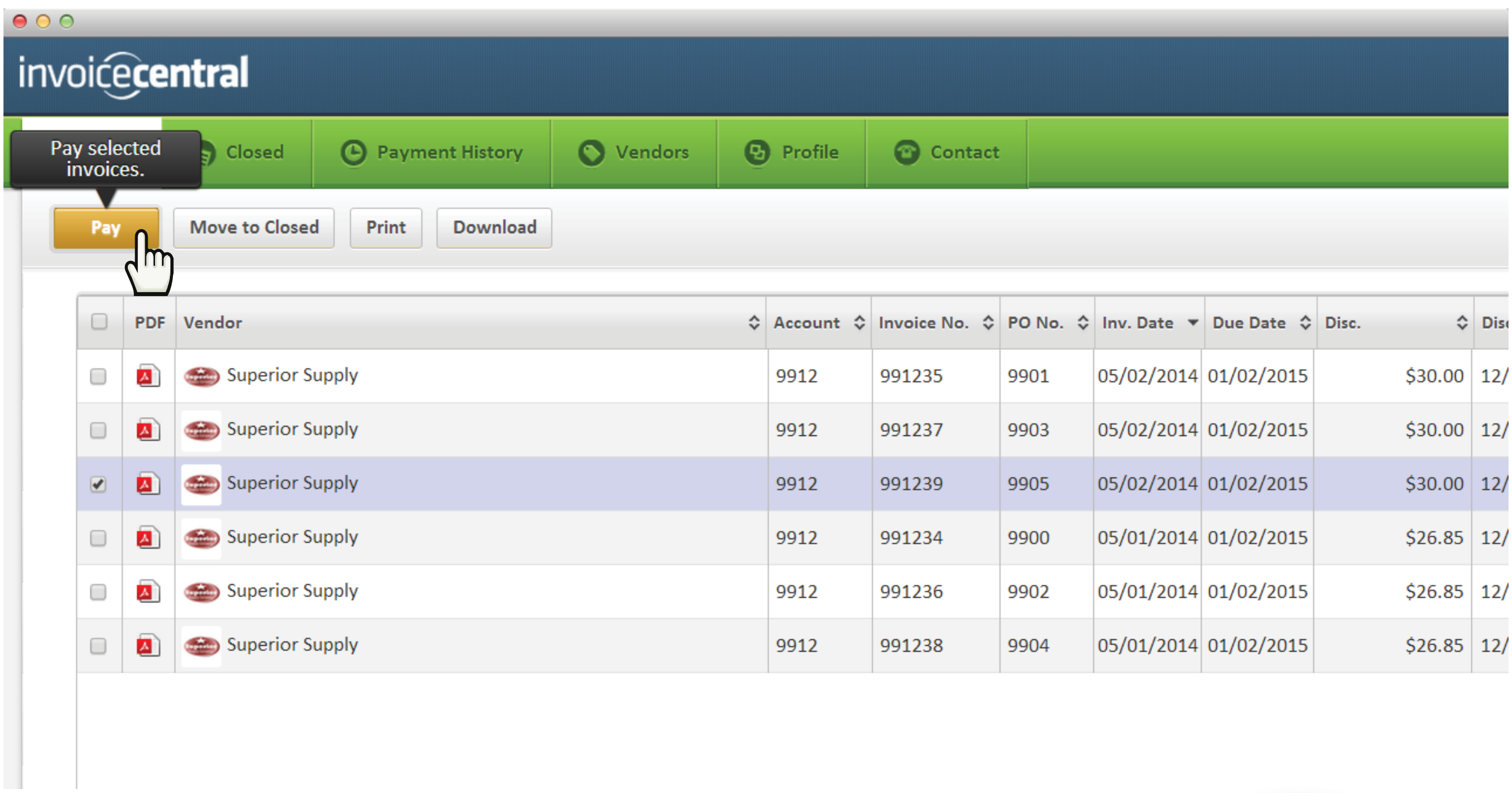
You can now also filter your *Open* menu by invoices, statements, or both. Your total amount due will be shown, based only on the filter you've selected. Once you've selected your filter, your *Total Amount Due* at the bottom of the screen will only reflect your total corresponding to the filter you've selected. You can also search for specific vendor's invoices/statements by typing their name into the search field under the *Open* tab.



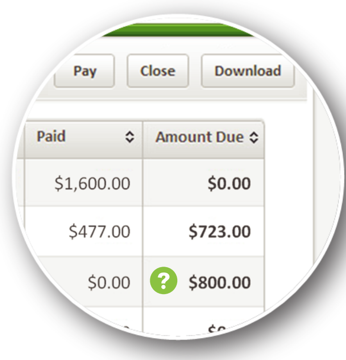
Make Payments

Step 1

Under the *Open* tab, select the invoice(s) you'd like to pay by clicking the checkbox to the left of the PDF icon. Once selected, click *Pay*.



When you see a question mark symbol next to your *Amount Due*, this means the vendor does not provide us with an updated balance due for your invoices/statements - if you pay this vendor outside of Invoice Central, your payments will not be reflected in your Invoice Central account. If you have paid outside of Invoice Central, we suggest you move the invoice to the *Closed* tab so they are not included in the total amount due.



Make Payments

Step 2

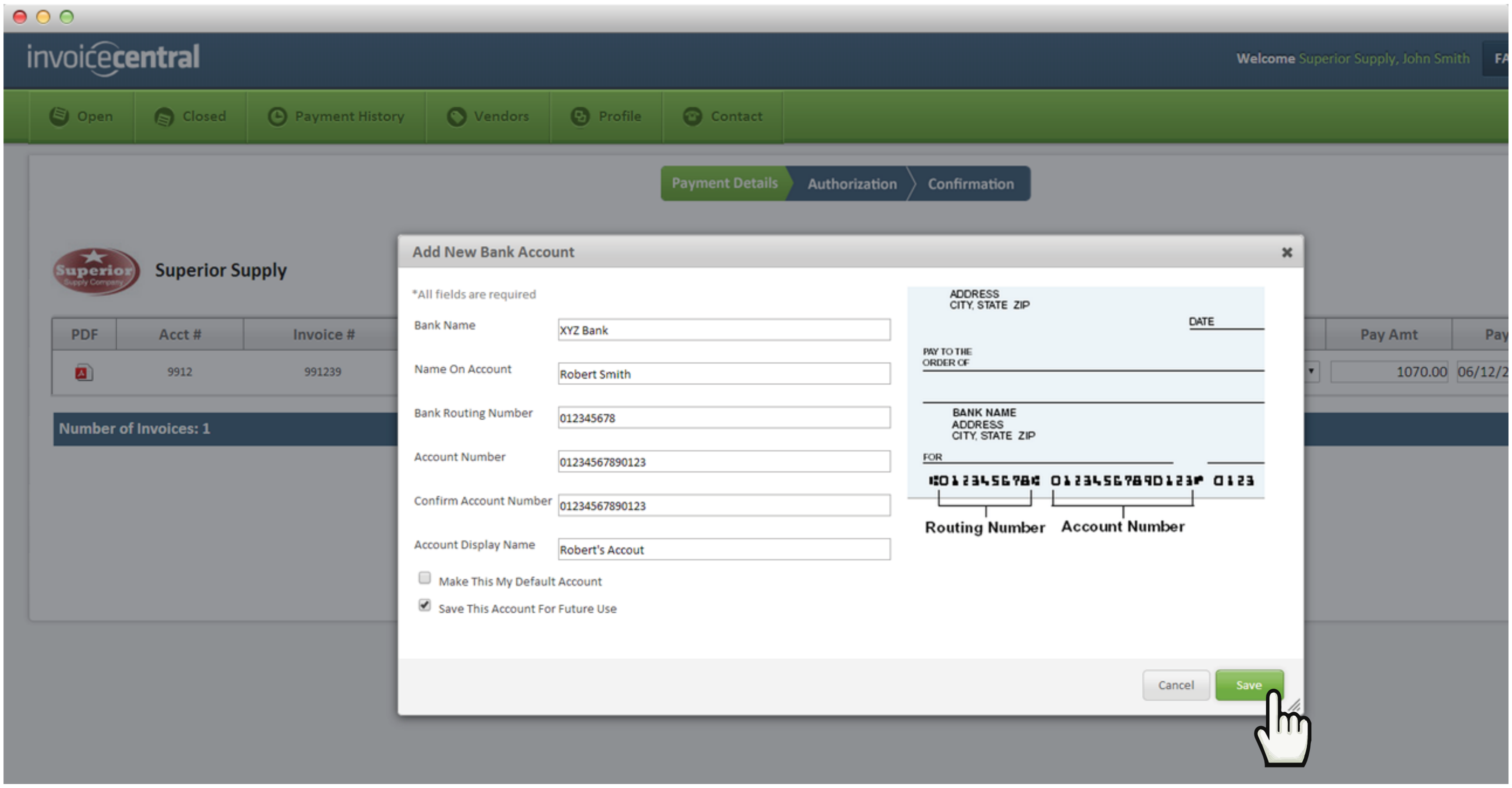
Once on the *Payment Details* screen, select a payment account from the drop down menu under the *Payment Acct* tab. If you already have a payment account saved, you will be able to select your account from the drop down menu. If you do not have an account saved, you can select *Add New Bank Account* or *Add New Credit Card*. Select your preferred payment account type, and complete the required fields. Once finished, click *Save.*

Helpful Tip

When adding a payment account, check the box labeled "Save This Account For Future Use" to expedite future invoice payments.

Note:

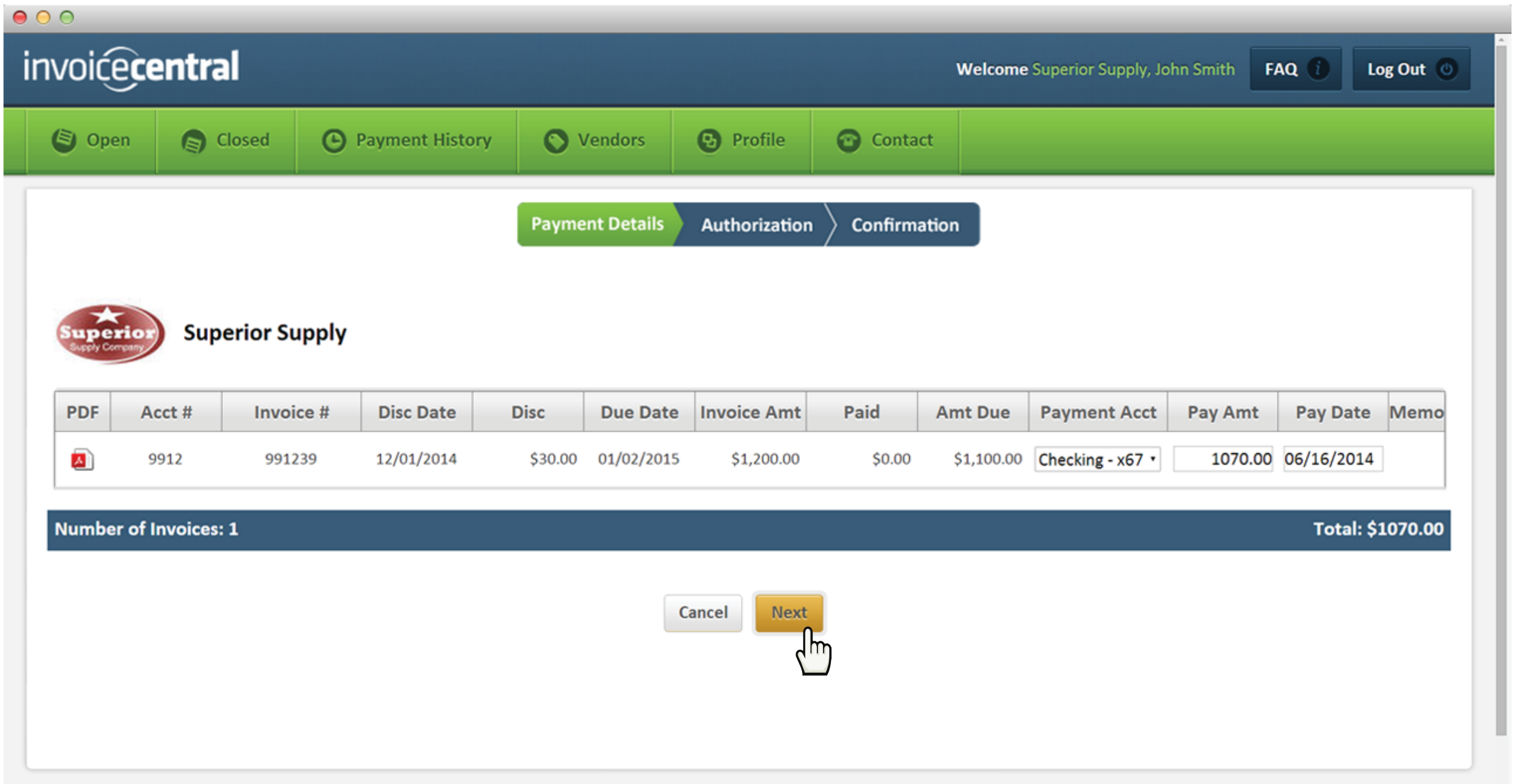
Although you can add both checking and credit card accounts to your profile, certain vendors may only accept one payment method.



Make Payments

Step 3

Your payment amount defaults to your amount due, and the payment date defaults to today's date. If you would like to schedule a payment for a later date, type that date into the *Pay Date* field. If you are short paying or over paying for any reason, you will be prompted to select a reason. Once all fields are complete on the *Payment Details* page, click *Next*.

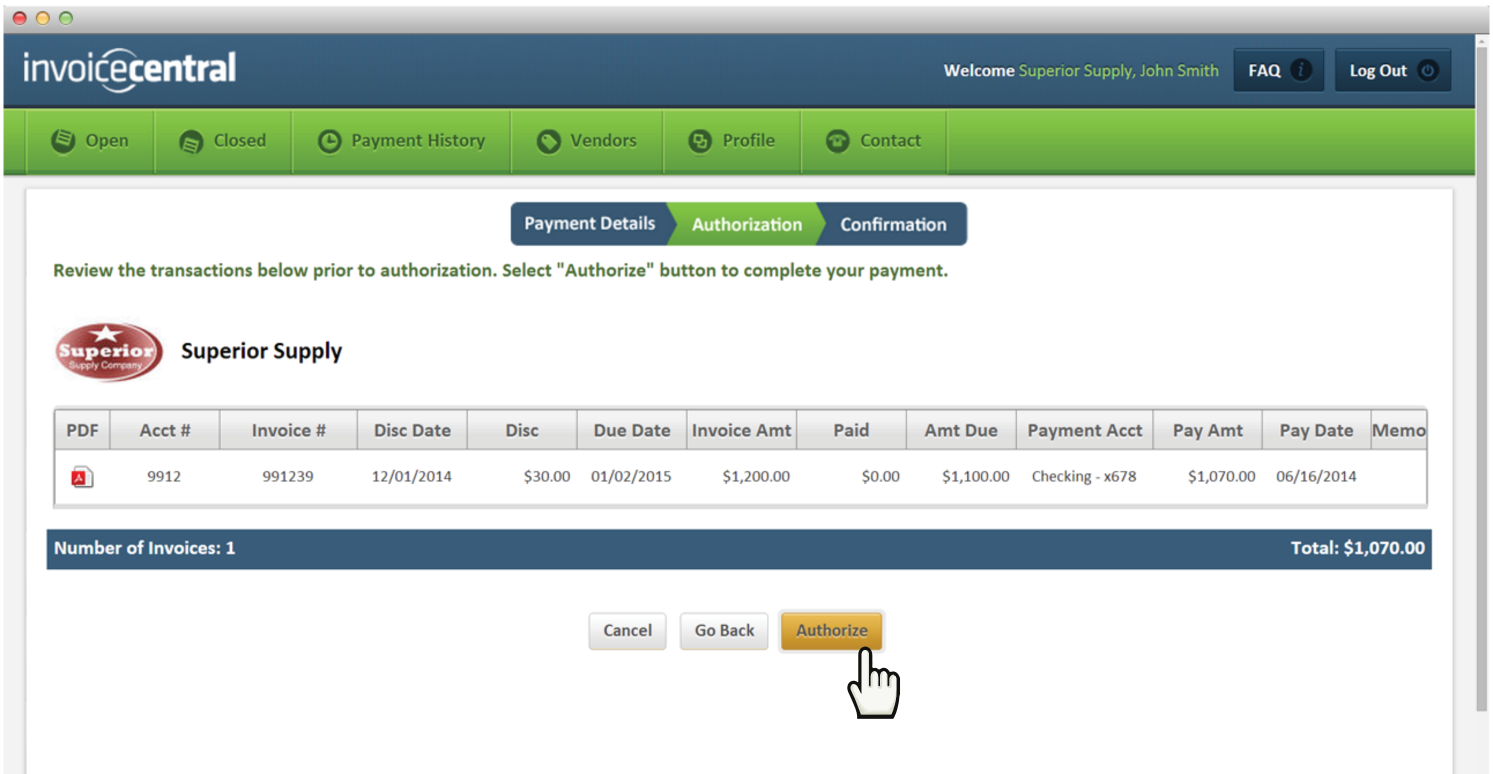


Note: If you qualify for an early pay discount, your payment amount will automatically reflect your discounted invoice/statement total.

Make Payments

Step 4

On the next screen, you will be asked to review your transactions.Make sure all of your information is accurate, and click *Authorize* once you are ready to complete your payment.



FAQ

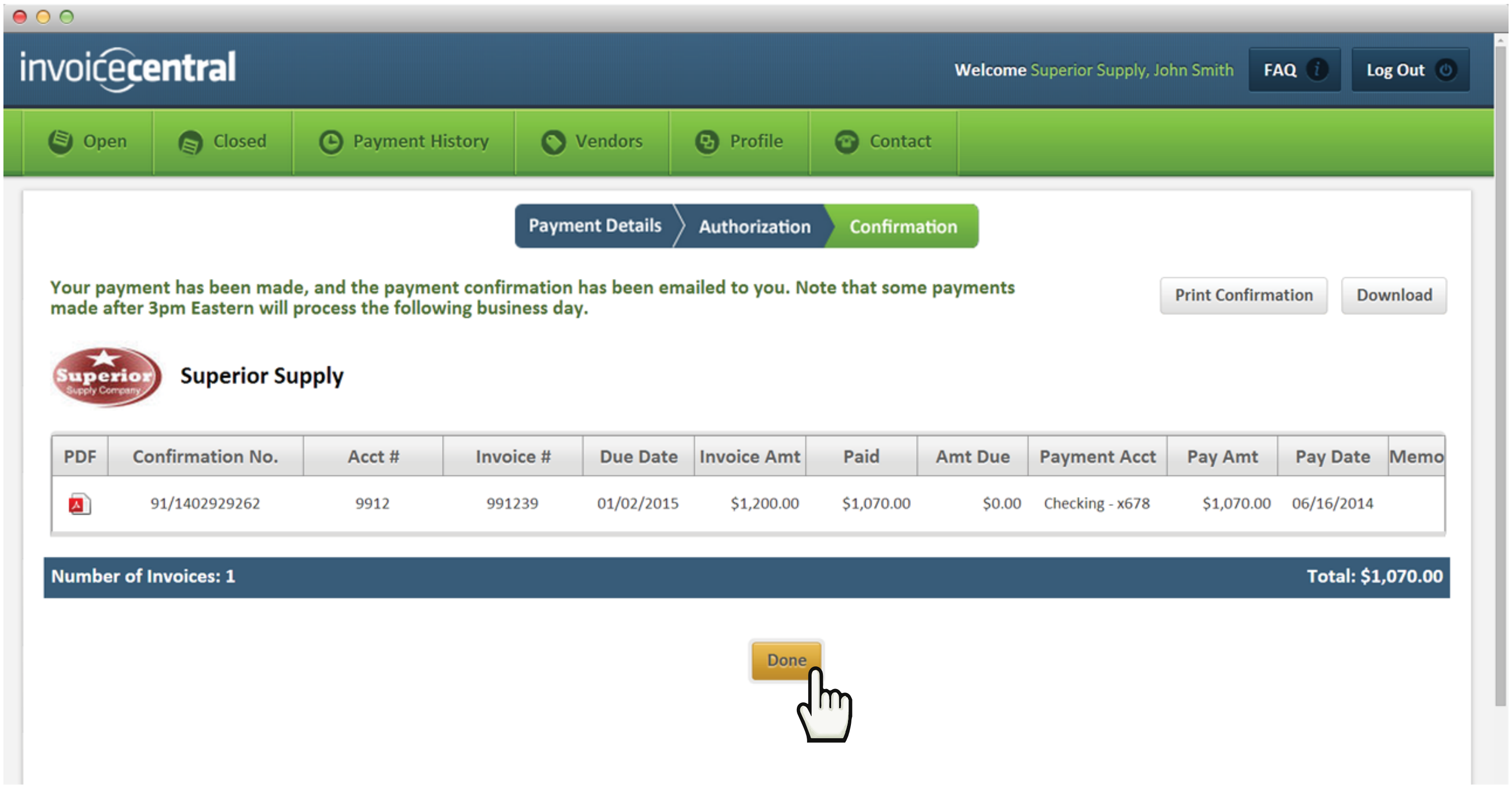
How do I apply credit given by my vendor to my next payment?

When your vendor has granted you a credit, the invoice/statement they applied the credit toward will show a negative balance in the *Open* tab. Select that invoice/ statement, along with any other bill you'd like to pay, and click *Pay*. On the next page, your total amount due will reflect your new total with the credit automatically applied.

Make Payments

Final Step

Once your transaction is complete, you will land on the confirmation page, with a message stating that your payment was completed successfully. A confirmation will be sent to the email address on file, and you will also have the option to print your confirmation, as well as download the invoices you paid to QuickBooks. Click *Done* to return to your open invoices.



FAQ

How do I import my invoices and statements into QuickBooks?

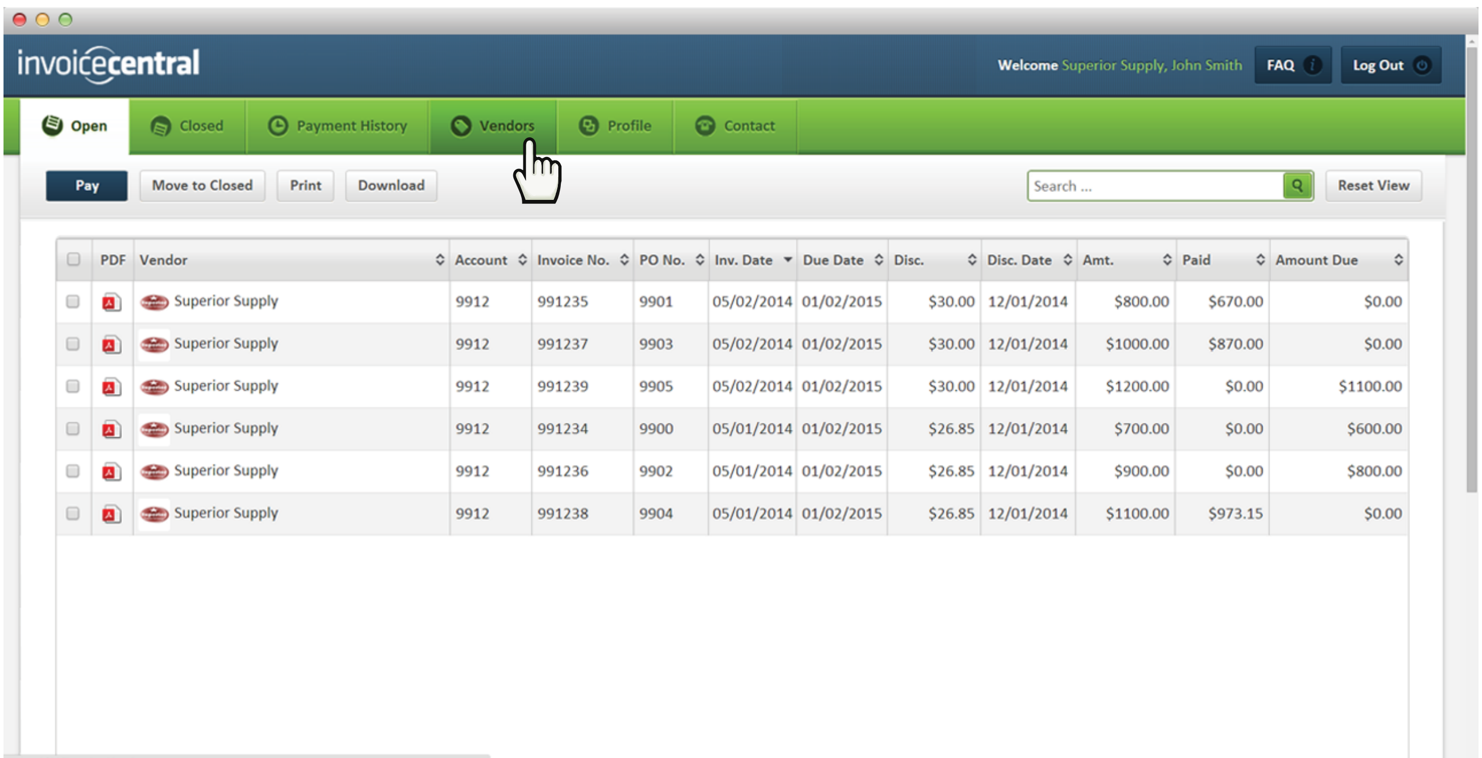
Invoicing data from the last 90 days can easily be downloaded from Invoice Central directly into QuickBooks. Click **here** to view our comprehensive how-to guide.

Add Vendors

You can receive and pay invoices from multiple vendors. To add vendors:

Step 1

» Click on the *Vendors* tab.



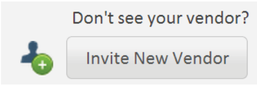
Add Vendors

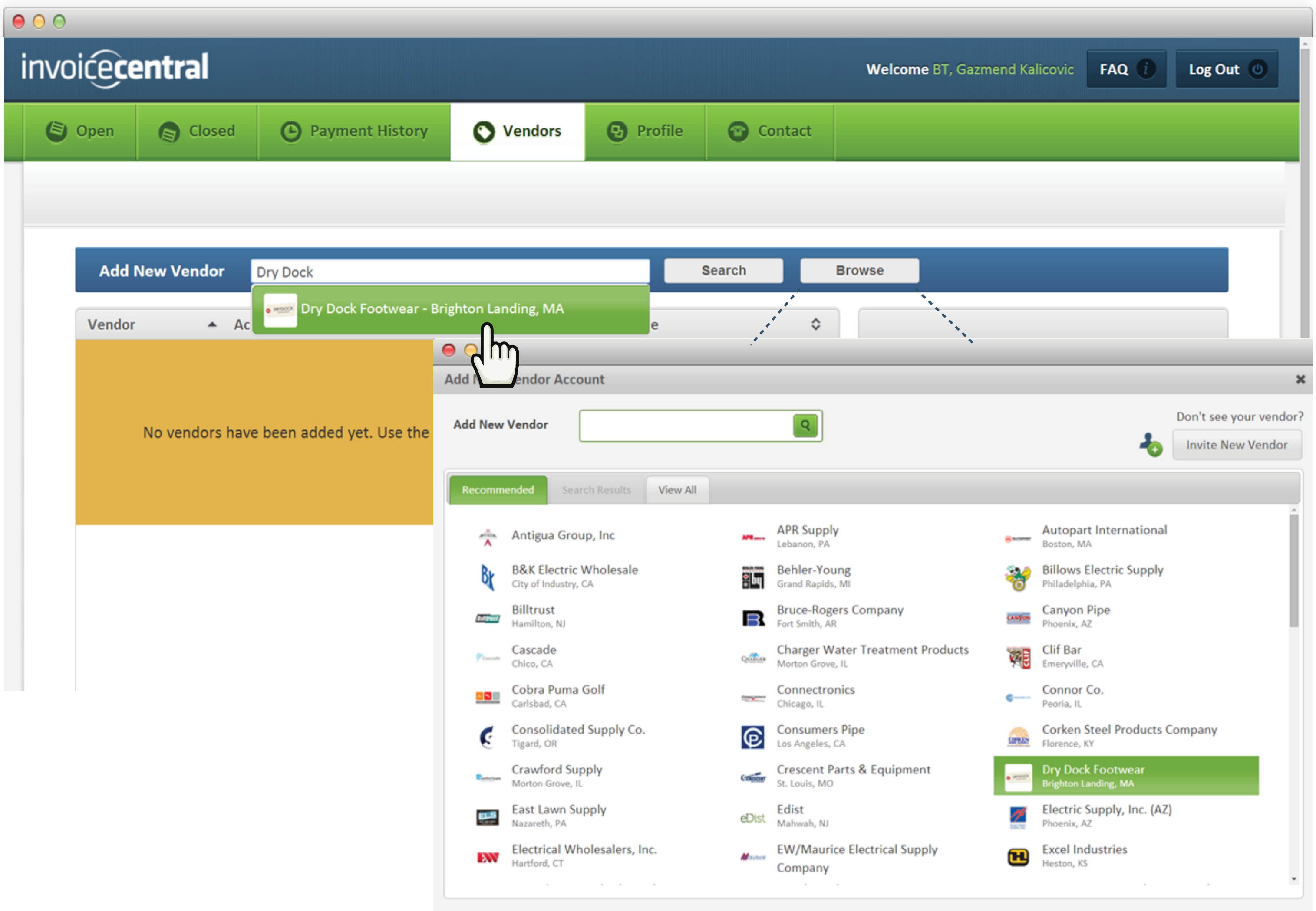
Step 2

In the *Add New Vendor* field, search for your vendor by typing in their name in the search field, or click *Browse* to browse our current list of vendors. Click on your vendor's name once you have located them.

Helpful Tip

Don't see your vendor listed? Click on "Invite New Vendor" in the "Browse" menu and we will personally reach out and help them join Invoice Central!





Add Vendors

Final Step

Enter in your account number, invoice number and invoice amount, and click *Add*.

Helpful Tip

Don't have an invoice from your vendor on hand? Contact your vendor and they will provide you with an enrollment token.