

# CUSTOMER PORTAL

O2C PRO



# Webcollect

Webcollect's Customer Portal provides customers a secure, advanced and easy to use online platform to manage their invoices and make payments.

## CUSTOMER STATEMENT

- Instantly create a statement of account listing all open transactions
- Statements are configurable to follow the client's approved format.

Integration of the Portal and the client's existing web applications is made seamless by branding the portal to match the client's approved logo, color scheme, fonts and deploying single sign on for authorization.

The system has preset roles that control what users can view and functions they may perform within the Portal.



### Customer Admin



Primary user of the portal who can also manage access for others in their organization

### Customer User



Portal users with the ability to download invoice copies, make payments, and dispute invoices

### Portal Administrator



User that manages the permissions that the customers can utilize in the portal.

## ACCOUNT DETAILS

- Manage AP contact information
- View method and frequency for invoice delivery
- Review Balance information including:
  - Total Balance
  - Total Past Due
  - Sum of invoices approved for payment
  - Sum of disputed invoices

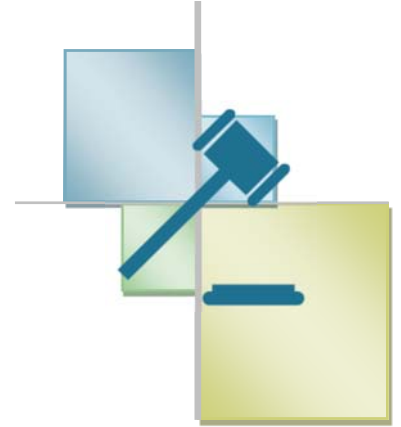
## INVOICE MANAGEMENT

Webcollect has been designed with an intuitive user interface to create an easy to use application

- Notifies users of new invoices issued
- View invoices (open and closed)
- Filter option to assist in managing complex accounts
- View and download single or multiple invoice copies
- Option to deliver invoice copies via email or hard-copy, fax
- Historic tracking of invoices viewed online
- Communication History shows invoice delivery and notification of sending success. Any failures will trigger a workflow to help obtain correct delivery information

## DISPUTE MANAGEMENT

- If a customer wishes to dispute an invoice, they are required to classify the reason. Once entered, the dispute resolution workflow will immediately begin
- Dispute reason codes can be configured by Client Administrator
- Ability to fully or partially dispute an invoice
- Attach electronic backup documentation to expedite the dispute resolution process



## ONLINE PAYMENT

- Approve invoices for payment
- Ability to instantly pay invoices via credit card or ACH
- Integration with Client's payment vendor or utilize one of Webcollect's plug and play merchants
- Short pay management with immediate dispute workflow triggers
- Future payment Scheduling
- History of past and future scheduled payments including invoice application details
- Option to assess surcharges / convenience fees



## COMMUNICATE WITH ANALYST

- Ability for users to leave comments on transactions for their team's reference or to send a note to the analyst assigned to their account
- Customer notes entered via the Portal create a priority task for the analyst



## REPORTING

Quick and efficient ad-hoc reporting for all Portal activity

- Portal activity analysis by activity type
- Reporting of total time logged in Portal by user and activities performed
- Payments processed for ACH and Credit Card
- Disputes logged in the Portal
- Invoice delivery / notification success



For general inquiries or to schedule a demo

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