

# Green Seal Client Payment Portal



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## Green Seal Client Payment Portal

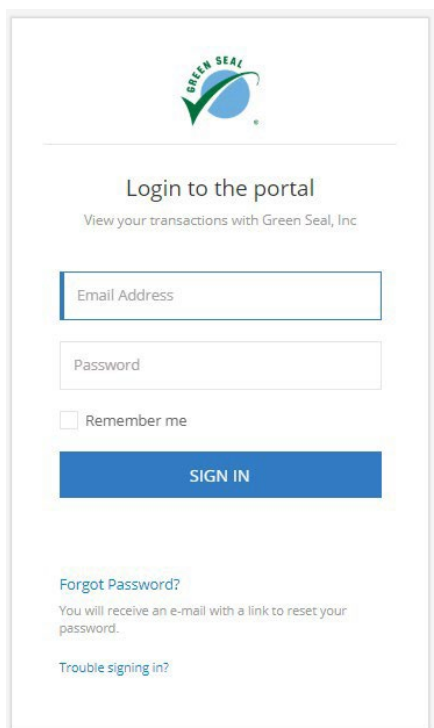
Green Seal has launched a Client Payment Portal to allow all our customers to more easily manage all of their transactions with Green Seal. The portal was launched in May of 2019 and includes historical transaction records going back to October 1st, 2018.

Note: For some customers with an open balance as of October 1st, 2018 you may see an invoice that states 'Customer Opening Balance (as of Oct. 1st 2018)'. This is not an actual invoice, but rather the opening balance of any unpaid invoices as of October 1st, 2018.

## Accessing the Client Payment Portal

You can access the Green Seal Client Payment Portal at: <https://books.greenseal.org/portal/greenseal>

You can login to the client portal using your email address and the password created following the invite email.




The screenshot shows the login interface for the Green Seal Client Payment Portal. At the top is the Green Seal logo, which consists of a green checkmark inside a blue circle with the words 'GREEN SEAL' above it. Below the logo is the heading 'Login to the portal' and a subtext 'View your transactions with Green Seal, Inc'. There are two input fields: 'Email Address' and 'Password'. Below these is a checkbox labeled 'Remember me'. A blue 'SIGN IN' button is positioned below the checkbox. At the bottom, there are two links: 'Forgot Password?' and 'Trouble signing in?'. The 'Forgot Password?' link has a subtext: 'You will receive an e-mail with a link to reset your password.'



# Dashboard

The first thing that you will see upon logging into your client portal will be the dashboard. The dashboard displays important details such as, outstanding invoices, available credits and the last payment made.



Jeff's Test CR...  
jeff.kuzlemko@gma...

Home

Estimates

Invoices

Payments Made

Statements

Hello Board Meeting Demo 2 (Ignore!)

OUTSTANDING INVOICES

\$1.00

Pay Now

Available Credits

\$0.00

LAST PAYMENT MADE

\$1.00

paid for INV-001172,  
on 18 Apr 2019.

My Account Details

Edit

Jeff's Test CRM Contact

jeff.kuzlemko@gmail.com

2026974178

2025491717

BILLING ADDRESS

Edit

123 Main St  
Washington  
DISTRICT OF COLUMBIA  
United States  
20011

SHIPPING ADDRESS

Edit


123 Main St  
Washington  
DISTRICT OF COLUMBIA  
United States

CARD DETAILS

\*\*\*\* \* 3775 2/2022 edit

BANK ACCOUNTS

\*\*\*\* \* 2639 Ally edit



Green Seal, Inc

1001 Connecticut Ave. NW  
Suite 827  
Washintgon, District of Columbia 20036  
U.S.A

Mail

Review



## Transactions

You can view the status of all the invoices and estimates you have received as well as the payments made in the past.

## Estimates

You can view a list of the estimates you've received from us (Note: Green Seal has not historically used 'Estimates', but we will in the future). If you are satisfied with the price, you can take your business forward by clicking on the Accept button. You can also filter the list to display a particular type of estimate by clicking on the drop-down above the list.

Jeff's Test CR...  
jeff.kuziemko@gmail...

Home

Estimates

Invoices

Payments Made

Statements

Estimates

Show: All Estimates ▾

Estimate #	Reference#	Date
EST-000012		24 Apr 2019
EST-000011		25 Mar 2019
EST-000010		18 Mar 2019
EST-000009		18 Mar 2019

Jeff's Test CR...  
jeff.kuziemko@gmail...

Home

Estimates

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Payments Made

Statements

< Back

Accept

Decline


Download

More

Enter your comments

Add Comment

Open



Green Seal, Inc  
1001 Connecticut Ave. NW  
Suite 827  
Washington, District of Columbia 20036  
U.S.A

Bill To  
Board Meeting Demo 2 (Ignore)  
123 Main St  
Washington, DISTRICT OF COLUMBIA 20011  
United States

Estimate Date : 25 Mar 2019

#	Item & Description	Qty	Rate	Amount
1	Certification Fee	1.00	100.00	100.00
Sub Total				100.00
Total				\$100.00



Invoices

You can view a list of invoices in the portal and open the invoice by clicking on one of them. If the invoice is unpaid, you can choose to pay by clicking on Pay Now.

Jeff's Test CR...  
jeff.kuziemko@gma...

Home

Estimates

Invoices

Payments Made

Statements

Invoices

Show: All Transactions   Sort By: Date


Invoice #

INV-001172

INV-001173

INV-001246

Paid



Green Seal, Inc  
1001 Connecticut Ave. NW  
Suite 827  
Washington, District of Columbia 20036  
U.S.A

Invoice

# INV-001172

Balance Due

\$0.00

Bill To

Board Meeting Demo 2 (Ignore)  
123 Main St  
Washington, DISTRICT OF COLUMBIA 20011  
United States

Invoice Date : 11 Apr 2019

Terms : Net 30

Due Date : 11 May 2019

#	Item & Description	Qty	Rate	Amount
1	GS-1 Certification Fee GS-1 Certification Fee	1.00	1.00	1.00
Sub Total				1.00
Total				\$1.00
Payment Made				(-) 1.00
Balance Due				\$0.00



## Making Payments

You can make payments directly from the portal via credit card or ACH.

Payment for INV-001246


Balance Due <b>\$1.00</b>	INV-001246 Due Date: 24 May 2019
------------------------------	-------------------------------------

Select your payment method to proceed

 <b>Pay via Card</b> Make fast and secure payments through your card.	>
 <b>Bank Account</b> Make simplified payments through your Bank account.	>

## Making Credit Card Payments

For making payments using Credit/Debit card, you can enter your card number, CVV, expiry date, billing address and country. You can also save the card and use it while making payments for upcoming invoices.

 **Pay via Card**  
Make fast and secure payments through your card.

☐ Card ending with **3775**  
Pay via Forte

☒ Use another Card

**CARD DETAILS**  
Your card details are sent to Forte via secure SSL connection for payment processing. We do not store your card informat in our servers.

Card Number

CVV

Expires on

MM

▼

YYYY

▼

First Name

Jeff's

Last Name

Test CRM Contact

**BILLING ADDRESS**  
The billing address entered here must match the billing address of the card holder.

Address

123 Main St

City

Washington

Zip Code

20011

State

DISTRICT OF COLUMBIA

Country


Select Country ▼

☐ I authorize Green Seal, Inc to charge this credit card automatically for future transactions

Note: You can also choose to save your account details for future transactions by checking the 'I authorize Green Seal, Inc. to charge this bank account automatically for future transactions' option.




# Making ACH Payments



Bank Account

Make simplified payments through your Bank account.



☐ Account ending with 2639

Pay via Forte

☒ Use another account

BANK DETAILS

Your account details are sent to via secure SSL connection for payment processing. We do not store your account information in our servers.

First Name

Jeff's

Last Name

Test CRM Contact

Bank Name

Account #

Account Type

Routing Number

☐ I authorize Green Seal, Inc to charge this bank account automatically for future transactions.

Note: You can also choose to save your account details for future transactions by checking the ‘I authorize Green Seal, Inc. to charge this bank account automatically for future transactions’ option.



## Bulk Payments


The dashboard will display the total amount for Outstanding Invoices. Select Pay Now to view the number of invoices for which the amount is due.

**Outstanding Invoices:**  
**\$2,175.00**  
Available Credits: **\$191.99**

[Pay Now](#)

**Last Paid Invoice:**  
\$624.90 paid for [INV-000029](#), on 22 May 2015.

To view more details of the outstanding invoices, click on the hyperlink below the Total Amount.




Home  
Estimates  
**Invoices**  
Payments Made  
Statements


### Pay All Invoices

Total Amount  
**\$101.00**  
[For 2 invoices](#)

Invoice #	Due on	Balance Due
INV-000001	07/11/2016	\$50.00
INV-000002	07/11/2016	\$51.00

Select your payment method to proceed

**PayPal**  
Make safe online payments through PayPal.

**Credit Card**  
Make fast and secure payments through your Creditcard.

You can then proceed to make the payment for all your outstanding invoices using a Credit Card or through any one of the associated payment gateways.



# Payments Made

You can keep track of all the payments made on invoices.

Home

Estimates

Invoices

Payments Made

Statements

Show:	All Payments	Sort By:	Date
Payment #	Reference#	Date	Amount
PA-000570	EDAF30FA-5785-4E9F-9715-B3BB1...	18 Apr 2019	\$1.00
PA-000553	862C72CA-FAF4-4D2F-A2C0-E92...	11 Apr 2019	\$0.13

# Statements

You can view a detailed ‘Statement of Accounts’ consisting of all your activities (Note: Only back to October 1st, 2018). You can also have your statements printed or downloaded as PDFs.

Jon Wilson  
jons@zylker.com

Home

Estimates

Invoices

Payments Made

Statements

Change Password

Log Out

Date Range

This Year

Go

Download PDF

Print

To  
Mr. Jon Wilson

Statement of Accounts

01 Jan 2015 To 31 Dec 2015

Account Summary

Opening Balance

\$ 0.00

Invoiced Amount

\$ 77,000.00

Amount Paid

\$ 34,000.00

Balance Due

\$ 43,000.00

Date	Transactions	Details	Amount	Payments	Balance
01 Jan 2015	***Opening Balance***		0.00		0.00
02 Jun 2015	Invoice	INV-000004 - due on 02 Jun 2015	11,000.00		11,000.00
05 Jun 2015	Invoice	INV-000002 - due on 05 Jun 2015	11,000.00		22,000.00
05 Jun 2015	Invoice	INV-000003 - due on 05 Jun 2015	11,000.00		33,000.00
05 Jun 2015	Payment Received	\$11,000.00 for payment of INV-000003		11,000.00	22,000.00
05 Jun 2015	Payment Received	\$1,000.00 as retainer payment		1,000.00	21,000.00
05 Jun 2015	Invoice	INV-000005 - due on 04 Aug 2015	11,000.00		32,000.00
19 Jun 2015	Invoice	INV-000007 - due on 19 Jun 2015	11,000.00		43,000.00
19 Jun 2015	Invoice	INV-000008 - due on 19 Jun 2015	22,000.00		65,000.00
22 Jun 2015	Payment Received	\$11,000.00 for payment of INV-000002		11,000.00	54,000.00
22 Jun 2015	Payment Received	\$11,000.00 for payment of INV-000004		11,000.00	43,000.00
		Balance Due			\$ 43,000.00

## Save, Print, and Forward

Estimates and Invoices can be printed, downloaded as PDF's and can be forwarded to other contacts from the options provided inside the 'More' drop-down.

< Back to Invoices

Forward

More ▾

Paid

Zylker

2362 Kelly Drive

Charleston WV 25301

U.S.A

INVOICE

# INV-000004

## Customer Details

You can update and edit your personal details, company details and change your password using the client portal.

## My Account

The 'My Account' section is used for updating & editing personal details. You can fill in your name and contact details. You can also edit your credit/debit card details.

My Account

Contact Details

jack

Wilson

Mobile

Phone

Credit cards

\*\*\*\* \* 424210/2014edit

\*\*\*\* \* 42427/2028edit

Save

Cancel

## My Company Details

The 'My Company Details' option is used for updating and editing your company details. You can fill in your name and contact details including the Billing and Shipping address.

My Company Details

×

Jack Wilson

Billing Address

Address

City

State

Country

Zip Code

Shipping Address

Address

City

State

Country

Zip Code

Save

Cancel

## Change Password

You can change your password to enter the client portal by selecting this option.

Change Password

×

Old Password

New Password

Confirm Password

Confirm

Cancel

P.S: The password changes only for the specific person using the client portal – any other users from the same company would continue to have their own password.

