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

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.

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 2839
- 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  Last Name
Jeff’s        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.

![Bulk Payments Dashboard]

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

![Invoice Details]

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.

<table>
<thead>
<tr>
<th>Payment #</th>
<th>Reference#</th>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA-000570</td>
<td>EDAF325A-5785-4E9F-9785-B3BB1...</td>
<td>18 Apr 2019</td>
<td>$100</td>
</tr>
<tr>
<td>PA-000553</td>
<td>862C72CA-FAF4-4D2F-A2C0-E92...</td>
<td>11 Apr 2019</td>
<td>$015</td>
</tr>
</tbody>
</table>

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.
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.

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 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.

Change Password

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

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.