

Payment Portal User Guide

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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.

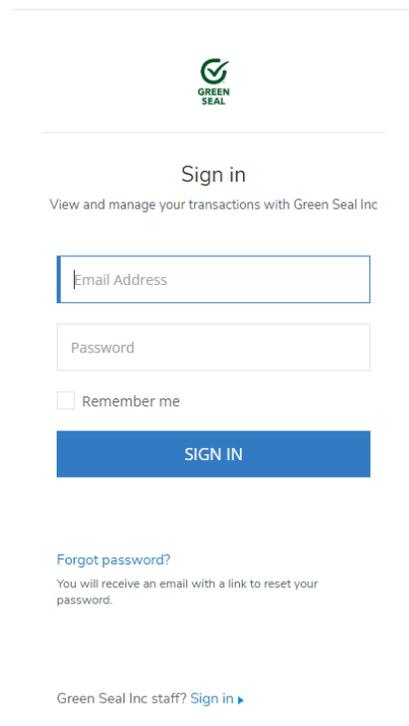
Note: For some customers with an open balance as of October 1st, 2018 you may see an invoice that states 'Customer Opening Balance (as of Oct. 1st 2018)'. This is not an actual invoice, but rather the opening balance of any unpaid invoices as of October 1st, 2018.

Accessing the Client Payment Portal

You can access the Green Seal Client Payment Portal at:

<https://books.greenseal.org/portal/greenseal>

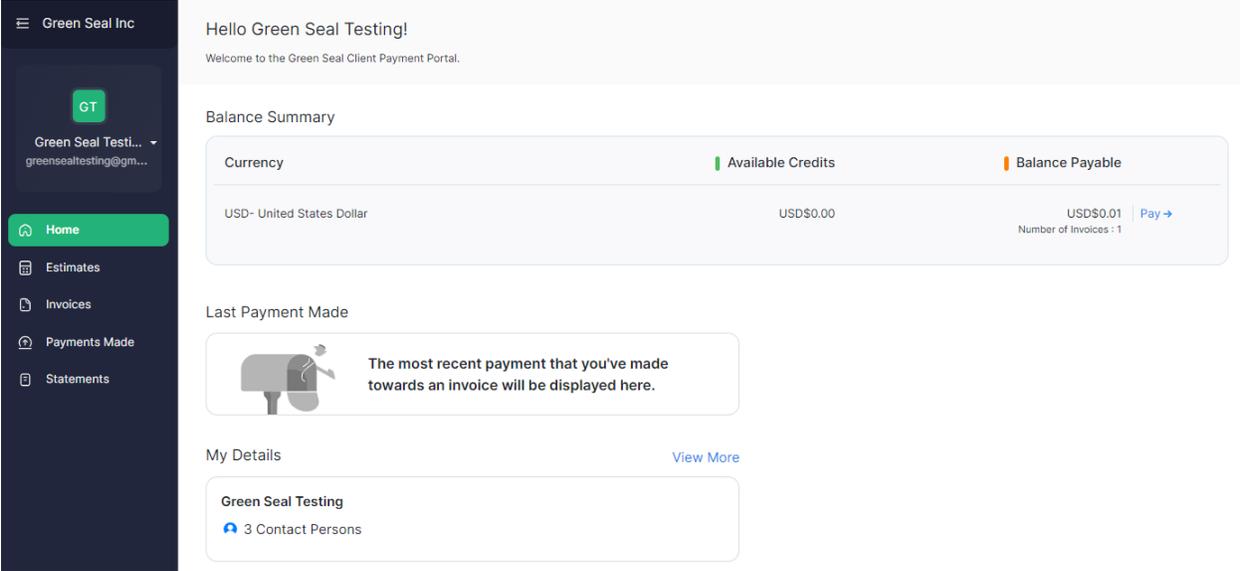
You can login to the client portal using your email address and the password created following the invite email.



The screenshot shows the sign-in page for the Green Seal Client Payment Portal. At the top center is the Green Seal logo, which consists of a green checkmark inside a circle above the words "GREEN SEAL". Below the logo is the heading "Sign in" and the subtext "View and manage your transactions with Green Seal Inc". There are two input fields: "Email Address" and "Password". Below the password field is a checkbox labeled "Remember me". A blue button with the text "SIGN IN" is positioned below the checkbox. At the bottom left, there is a link for "Forgot password?" with the text "You will receive an email with a link to reset your password." below it. At the very bottom left, there is a link for "Green Seal Inc staff? Sign in ►".

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.

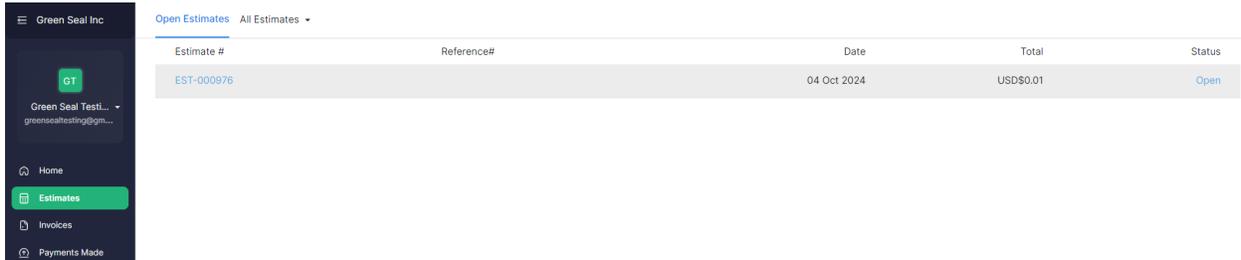


Transactions

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

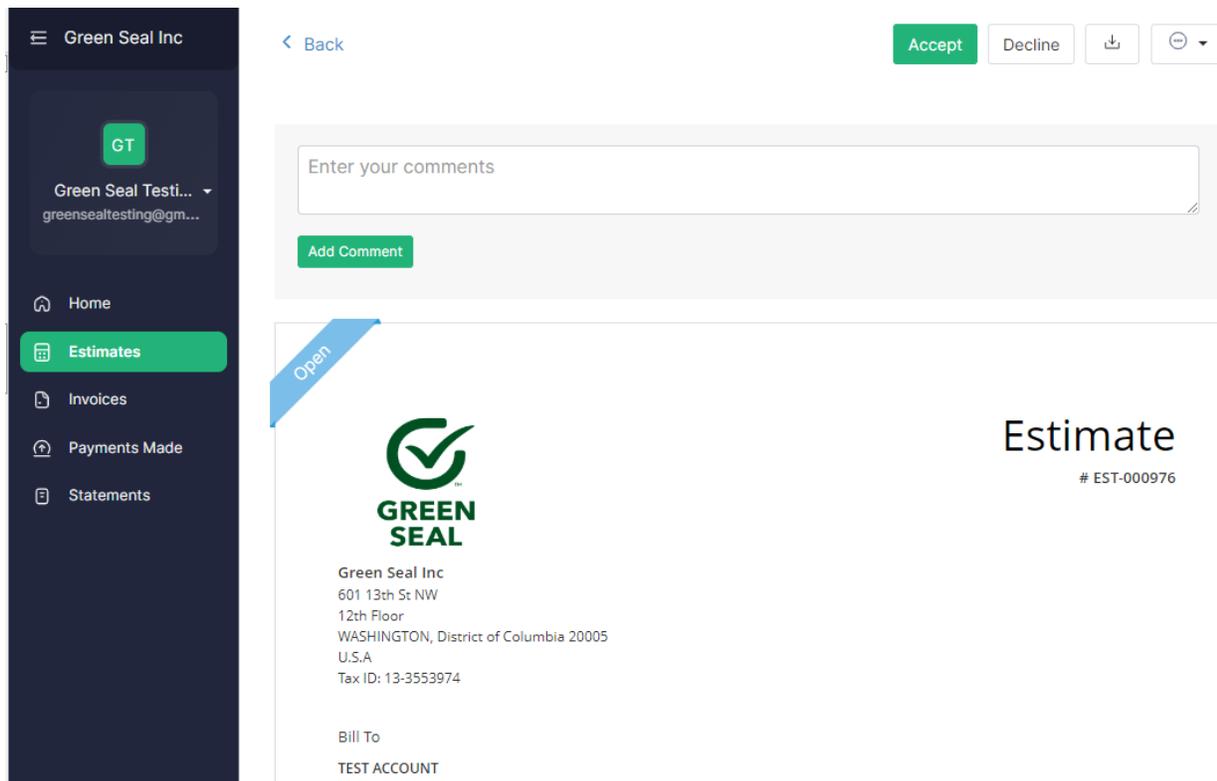
Estimates

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.



The screenshot shows the Green Seal Inc. mobile app interface. On the left is a dark sidebar with a menu containing 'Home', 'Estimates' (highlighted in green), 'Invoices', and 'Payments Made'. The main content area shows a table of estimates under the heading 'Open Estimates'. The table has columns for Estimate #, Reference#, Date, Total, and Status. One estimate is listed: EST-000976, Reference#, 04 Oct 2024, USD\$0.01, and Status 'Open'.

| Estimate # | Reference# | Date | Total | Status |
|------------|------------|-------------|-----------|--------|
| EST-000976 | | 04 Oct 2024 | USD\$0.01 | Open |



The screenshot shows the details of an estimate in the Green Seal Inc. mobile app. The sidebar on the left is the same as in the previous screenshot. The main content area has a 'Back' button and three action buttons: 'Accept' (green), 'Decline', and a download icon. Below these is a text input field for comments with an 'Add Comment' button. The estimate details are displayed in a white box with a blue 'Open' ribbon in the top-left corner. The Green Seal logo is prominent, followed by the company name and address: Green Seal Inc, 601 13th St NW, 12th Floor, WASHINGTON, District of Columbia 20005, U.S.A, Tax ID: 13-3553974. The 'Bill To' information is listed as TEST ACCOUNT.

Green Seal Inc
601 13th St NW
12th Floor
WASHINGTON, District of Columbia 20005
U.S.A
Tax ID: 13-3553974

Bill To
TEST ACCOUNT

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**.

| Invoice # | Reference# | Date * | Total | Balance Due | Status | |
|------------|------------|-------------|-----------|-------------|----------------|-------------------------|
| INV-006938 | --- | 19 Sep 2024 | USD\$0.01 | USD\$0.01 | Due in 27 days | Pay Now |

[Back](#) [Pay Now](#) [Print](#) [Download](#)

Enter your comments

[Add Comment](#)

Outstanding

GREEN SEAL HAS MOVED: PLEASE USE THE UPDATED MAILING ADDRESS LISTED BELOW FOR ALL FUTURE PAYMENTS AND CORRESPONDENCES.



Invoice
INV-006938
Balance Due
USD\$0.01

Green Seal Inc
601 13th St NW
12th Floor
WASHINGTON, District of Columbia 20005
U.S.A
Tax ID: 13-3553974

Bill To
TEST ACCOUNT

Making Payments

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

Payment for INV-001246

| | |
|------------------------------|-------------------------------------|
| Balance Due \$1.00 | INV-001246 Due Date: 24 May 2019 |
|------------------------------|-------------------------------------|

Select your payment method to proceed

-  **Pay via Card**
Make fast and secure payments through your card. >
-  **Bank Account**
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

First Name

Last Name

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

Address

City

Zip Code

State

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 Last Name

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**.

Michaels
michaels@zyker.c...

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.

| 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@zyker.com

- Home
- Estimates
- Invoices
- Payments Made
- Statements**

Change Password
Log Out

Date Range: This Year | Go | Download PDF | Print

Zyker
2362 Kelly Drive
Charleston WV 25301
U.S.A

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 |

To
Mr. Jon Wilson

| 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** ▾

Download PDF
Print

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

☰ Credit cards

| | | |
|-------------|---------|-------------------------------------|
| **** * 4242 | 10/2014 | <input type="button" value="edit"/> |
| **** * 4242 | 7/2028 | <input type="button" value="edit"/> |

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

Change Password

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

Change Password ×

Old Password

New Password

Confirm Password

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.