

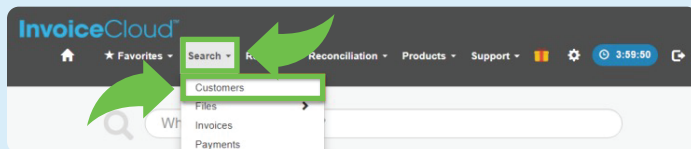
How to Send and Pay an Invoice via Text and Email

Teaching more customers to pay online means fewer phone calls, fewer walk-in payments, and more time to focus on other projects. This how-to guide provides step-by-step instructions for prompting your customers to make payments through text and email.

How To Send an Invoice By Text





1

From the Biller Portal, select "Search" > "Customers". From there, you can search by the Customer's name, email address, account number, or invoice number.









2

Once the customer has been located, click the *customer profile* link. Once the profile has loaded, click the "History" tab towards the top of your screen.

City	Email Address	Options
Boston	gerry@mail.com	
Boston		
Boston		
Boston		

3

From the "History" tab, you will see several icons towards the right side of each line item. Click the *cell phone* icon to send the customer a link to pay via text.

Total Amount	Balance Due	Action
\$0.00	\$0.00	     

4

At this time you will see a pop-up, prompting you to enter the customer's mobile phone number to receive the text. Once entered, click the "Send" button.

Send Invoice Notification by SMS

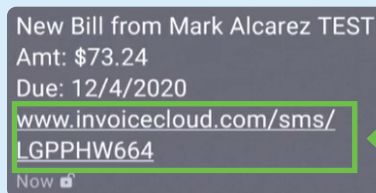
Sign customer up for Pay By Text: ☐

Enter a Phone Number:

Message and data rates may apply. You may opt out of text delivery at any time by replying STOP to any Text message received from Invoice Cloud. Text HELP for more information. Message frequency varies. Contact customer support at (617) 448-2675. T-Mobile is not liable for delayed or undelivered messages.

5

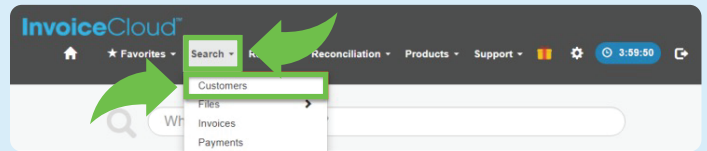
The customer will then receive a text message, prompting them to click the provided link, at which point they will be redirected to the mobile website of the payment portal, where they can view their invoice, proceed to payment, enter their card and personal information, and process their payment.



How To Send an Invoice By Text





1

From the *Biller Portal*, select "Search" > "Customers". From there, you can search by the Customer's name, email address, account number, or invoice number.







2

Once the customer has been located, click the customer *profile link*. Once the profile has loaded, click the "History" tab towards the top of your screen.

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Boston	gerry@mail.com	
Boston		
Boston		
Boston		

3

From the "History" tab, you will see several icons towards the right side of each line item. Click the cell *Envelope* icon to send the customer a link to pay Email.

Total Amount	Balance Due	Action
\$0.00	\$0.00	   

4


At this time you will see a pop-up, prompting you to enter the customer's email address, or to send if the email address is already saved on file. Once entered, click the "Send" button.

Resend Email Notification ✕

The invoice notification will be sent to the email recipient listed below

Account Owner

☒ aek@invoicecloud.com



5

The customer will then receive a text message, prompting them to click the provided link, at which point they will be redirected to the mobile website of the payment portal, where they can view their invoice, proceed to payment, enter their card and personal information, and process their payment.

Dear Arron Driscoll

A new invoice is now available to view online.

Sarah Lenard TEST has implemented a convenient online billing and payment system for you to access and pay your bills. Simply click on the **View Invoice** or **Pay Now** button to get started. You can review and print your invoice, pay electronically now, or schedule the date your invoice will be paid. ****AcceptedCards****

You may also access your invoice via our Customer Portal at <https://www.invoicecloud.com/sarahlenardtest>.

If you have any questions regarding your account, please email us at . Be sure to include your first name, last name, and account number.

Account Information

Account Number:	RE-1001
Invoice Number:	1001-1
Invoice Due Date:	12/17/2022
Balance Due:	\$0.00

Have any questions? We are always here to help:

billermarketing@invoicecloud.com • training@invoicecloud.com

Script

Intro text:

When a payer calls in or walks in to make a payment, utilize your new certification and take advantage of this opportunity to talk with the customer and show them the value of paying their bill online.

While I have you here, I wanted to show you how quickly you can pay your bill online. This is a quick and efficient process to easily pay your future bills online.

If they say yes:

Great – I am going to send you a text / Email now, which you will receive in just a second. You might want to put me on speakerphone if you're on the phone while I'm texting/emailing too! All you need to do is click on the link in the (text/email) message, and it will direct you to your payment portal. From there, you click on your invoice, enter your payment method, contact information, and press "Process Payment" to pay your bill.

You'll be able to confirm that you successfully made a payment because you'll receive an email receipt after you complete the transaction.

Don't lead with this because you're trying to get first-time payers to pay online and autopay may be a big step for them. However, if they're interested in learning about AutoPay, here is a way to talk about it.

Opting into Auto-Pay makes paying your bills even easier. You don't need to worry about remembering the due date for your bills anymore, on top of everything else you need to remember. When you're in the portal paying your bill this or next time, simply click the home button after you're logged in, click the Auto-Pay" button towards the top right corner of the screen, and follow the steps on the next page to set this up!

Have any questions? We are always here to help:

billermarketing@invoicecloud.com • training@invoicecloud.com