# Web Portal Client User Guide

Commercial Finance

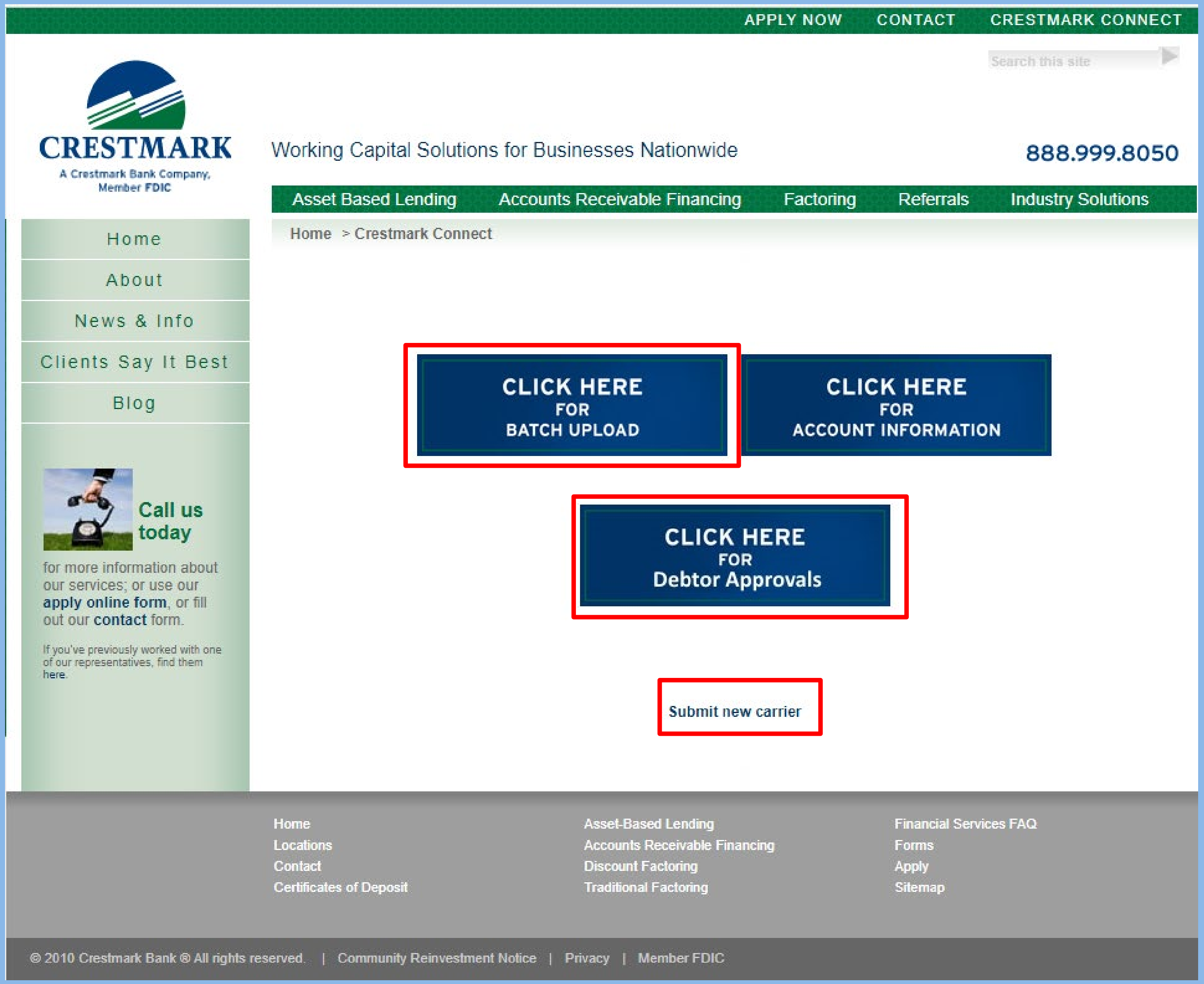
# IMPORTANT

You will continue to use your existing login Credentials prior to accessing the upgraded Portal.

Continue to utilize the existing login Credentials to submit the following:

- **Invoice Batch Uploads**
- **Quick Debtor Approval Requests**
- **Submit New Carriers**

To access your account information on the updated Portal via ‘CLICK HERE for Account Information’ Icon



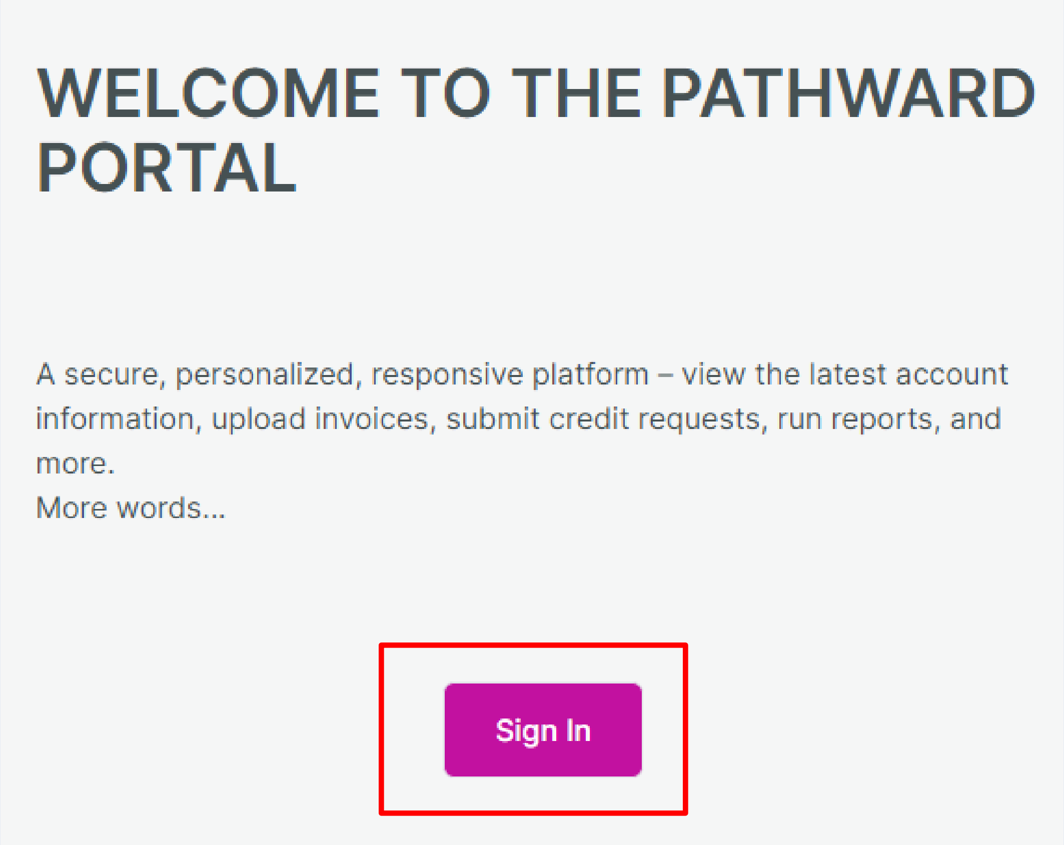
# Upgraded Portal Training Agenda

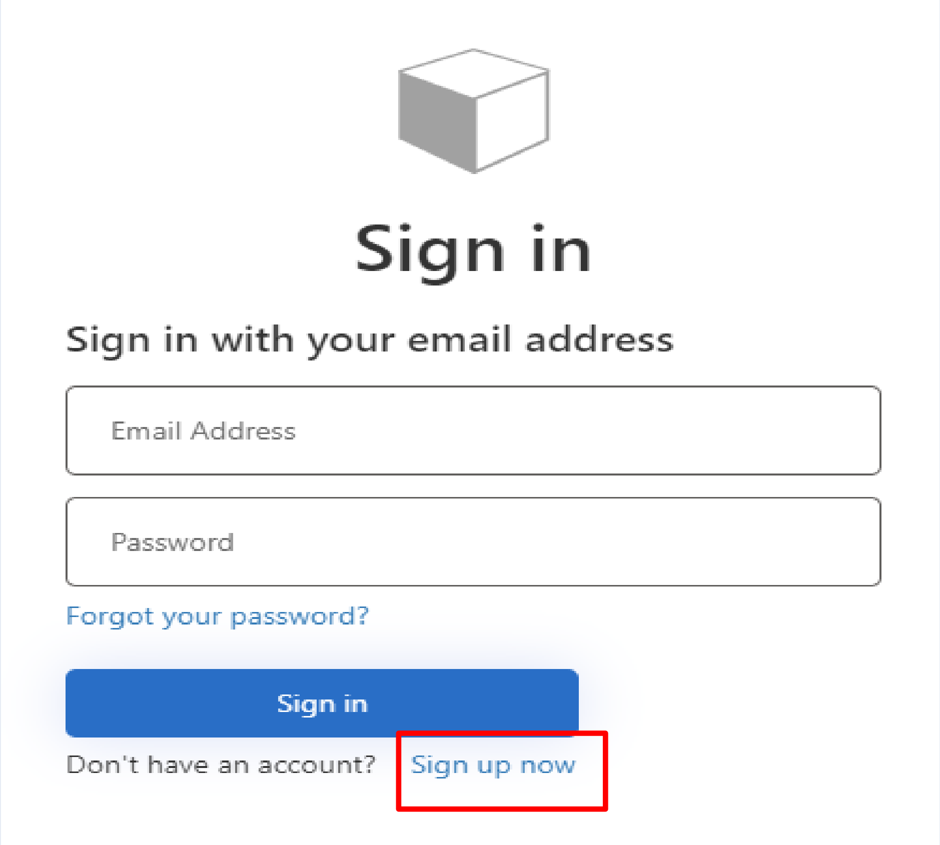
1. Authentication & Establishing Username and Password
2. Dashboard
3. Submit a Debtor Credit Limit Request
4. Facility List
5. Pending Schedules & Invoice Batches
6. Search Function
7. Report Options
8. Mobile Web Application Installation Instructions

# Authentication & Establishing Username and Password

All users will each have unique login credentials to access the upgraded Client Portal.

To establish your login credentials, click ‘Sign In’, then “Sign Up Now’

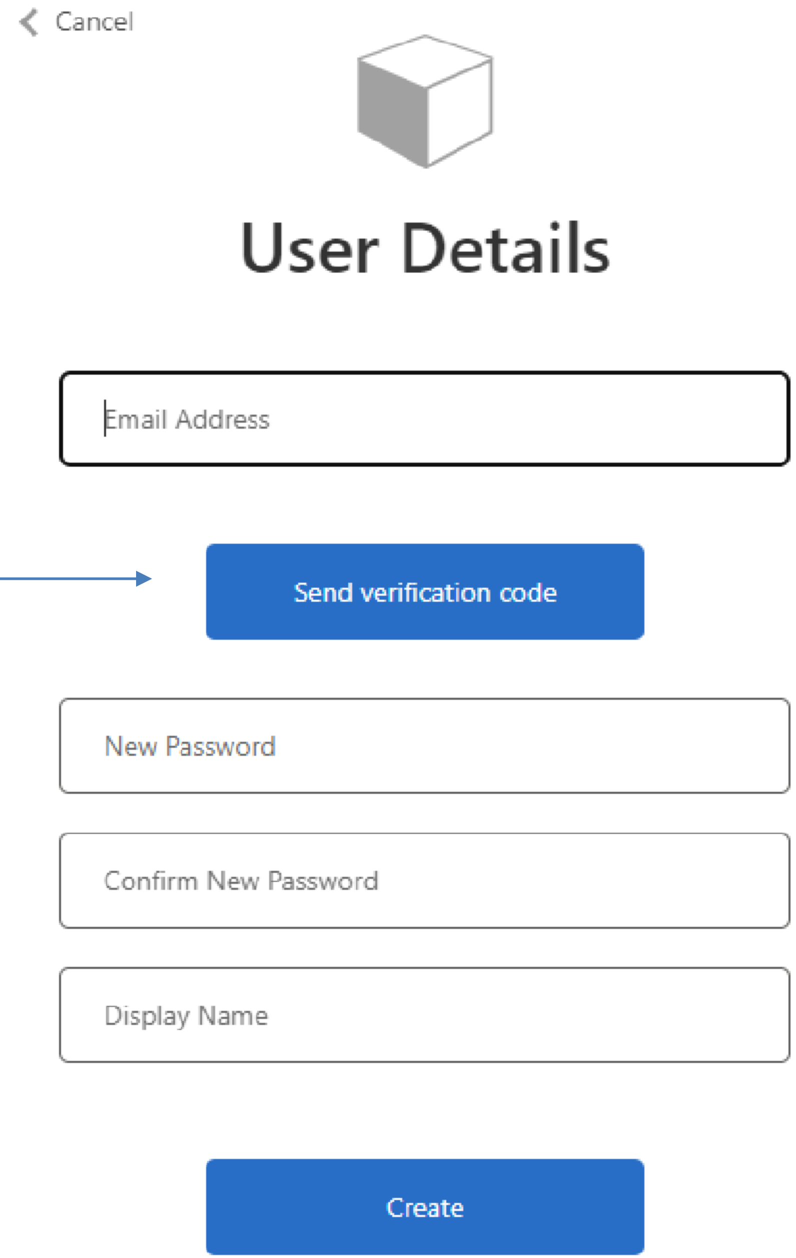


# Authentication & Establishing Username and Password continued

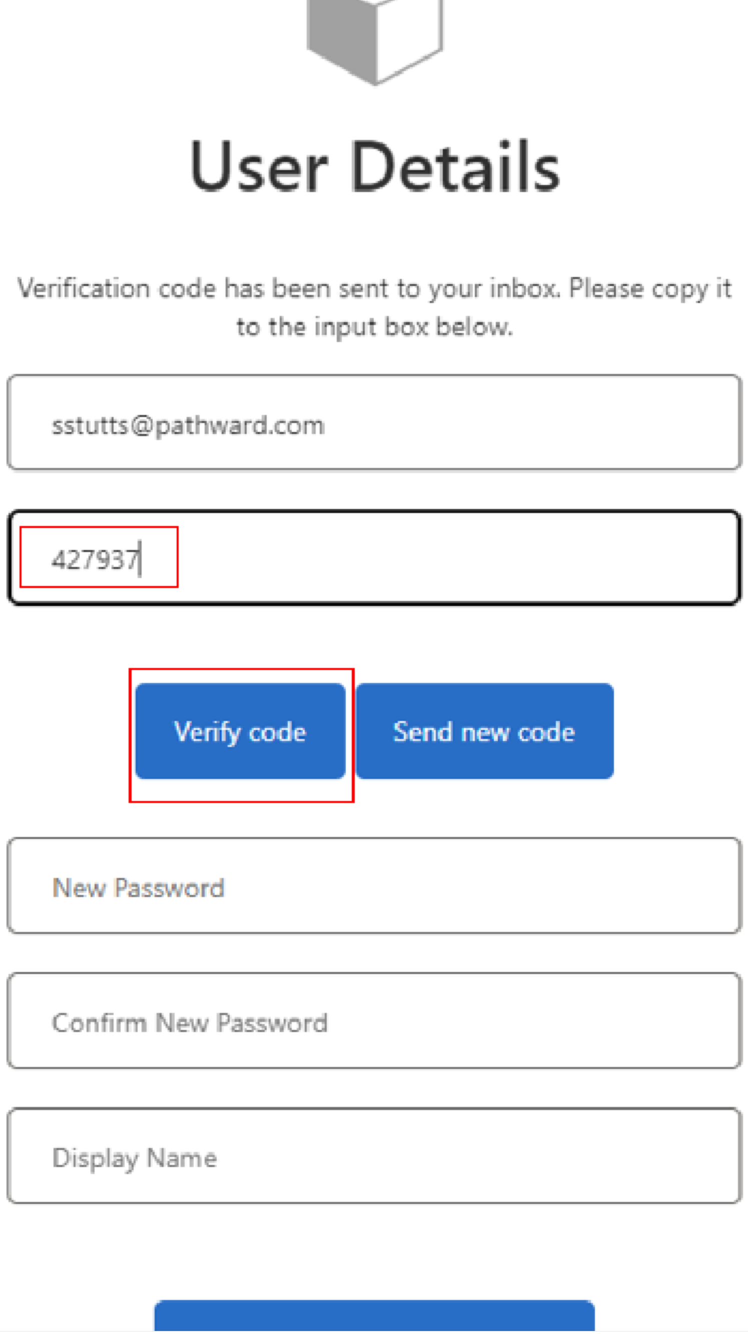
Enter email address and click “send verification code”

An email will be delivered to your email inbox with a one-time code to enter



# Authentication & Establishing Username and Password continued

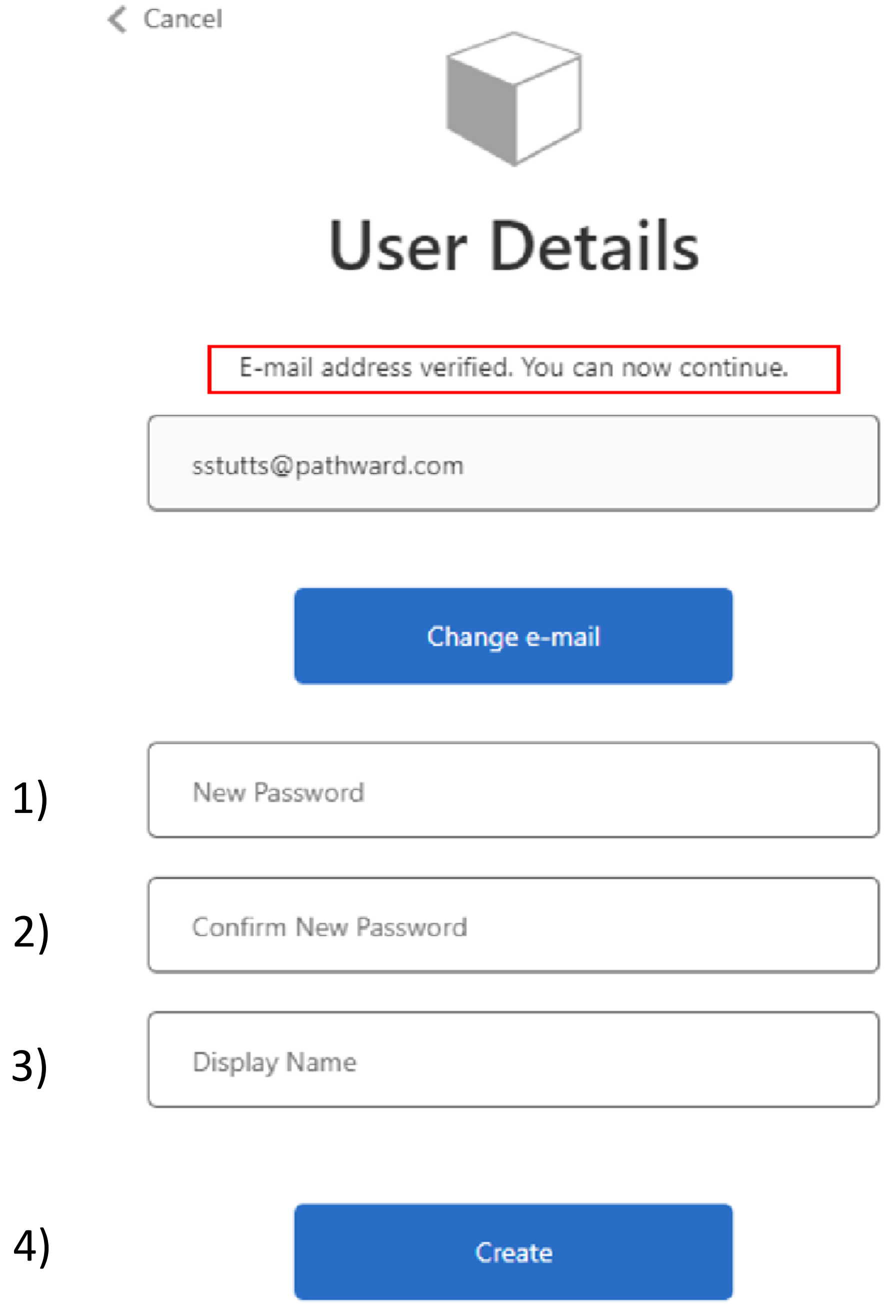
ENTER THE CODE THAT WAS EMAILED AND CLICK ‘ VERIFYCODE’



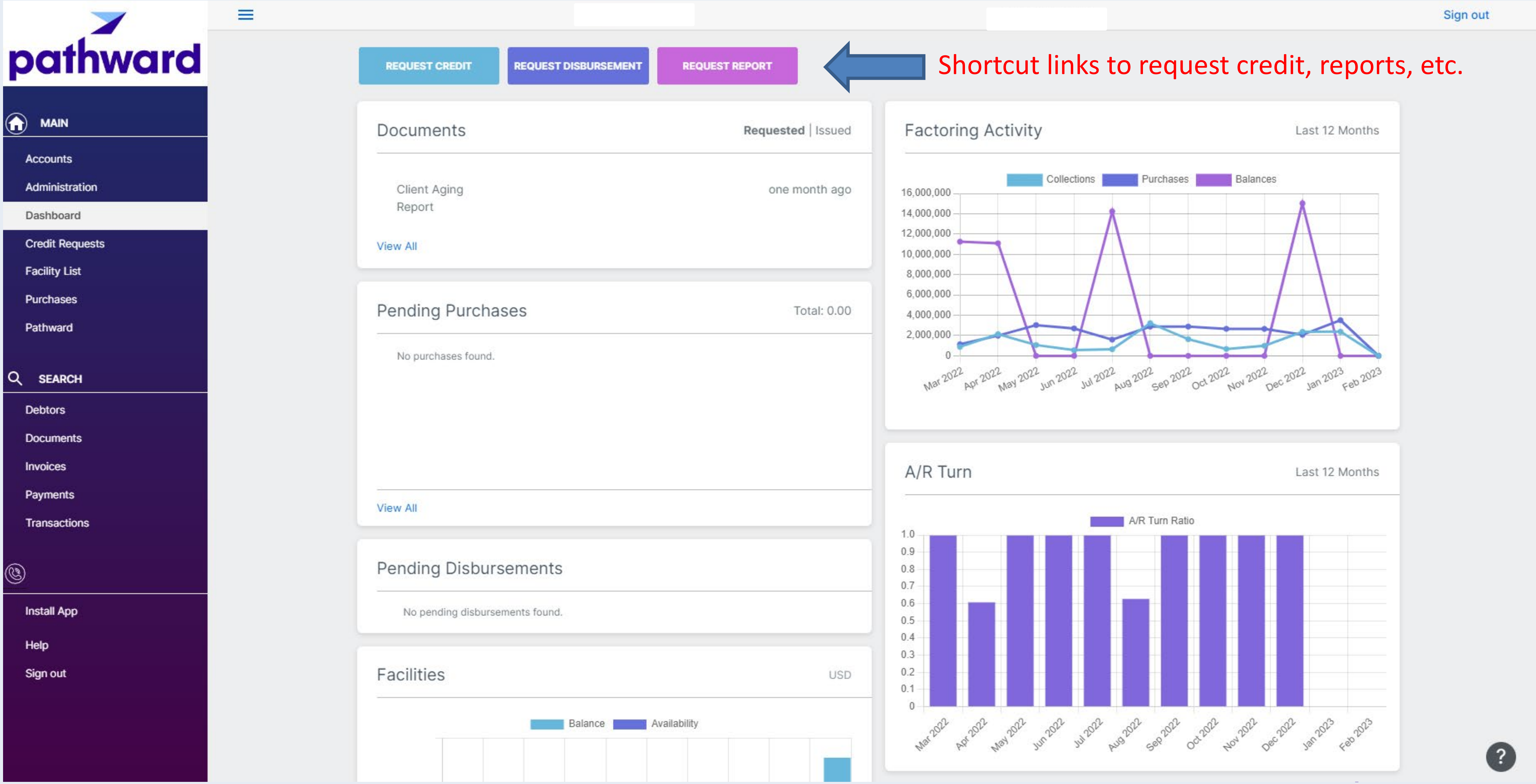
# Authentication & Establishing Username and Password continued

**ONCE EMAIL ADDRESS IS VERIFIED:**

1) **ENTER A NEW PASSWORD**
2) **CONFIRM NEW PASSWORD**
3) **CREATE A DISPLAY NAME**
4) **CLICK 'CREATE'**

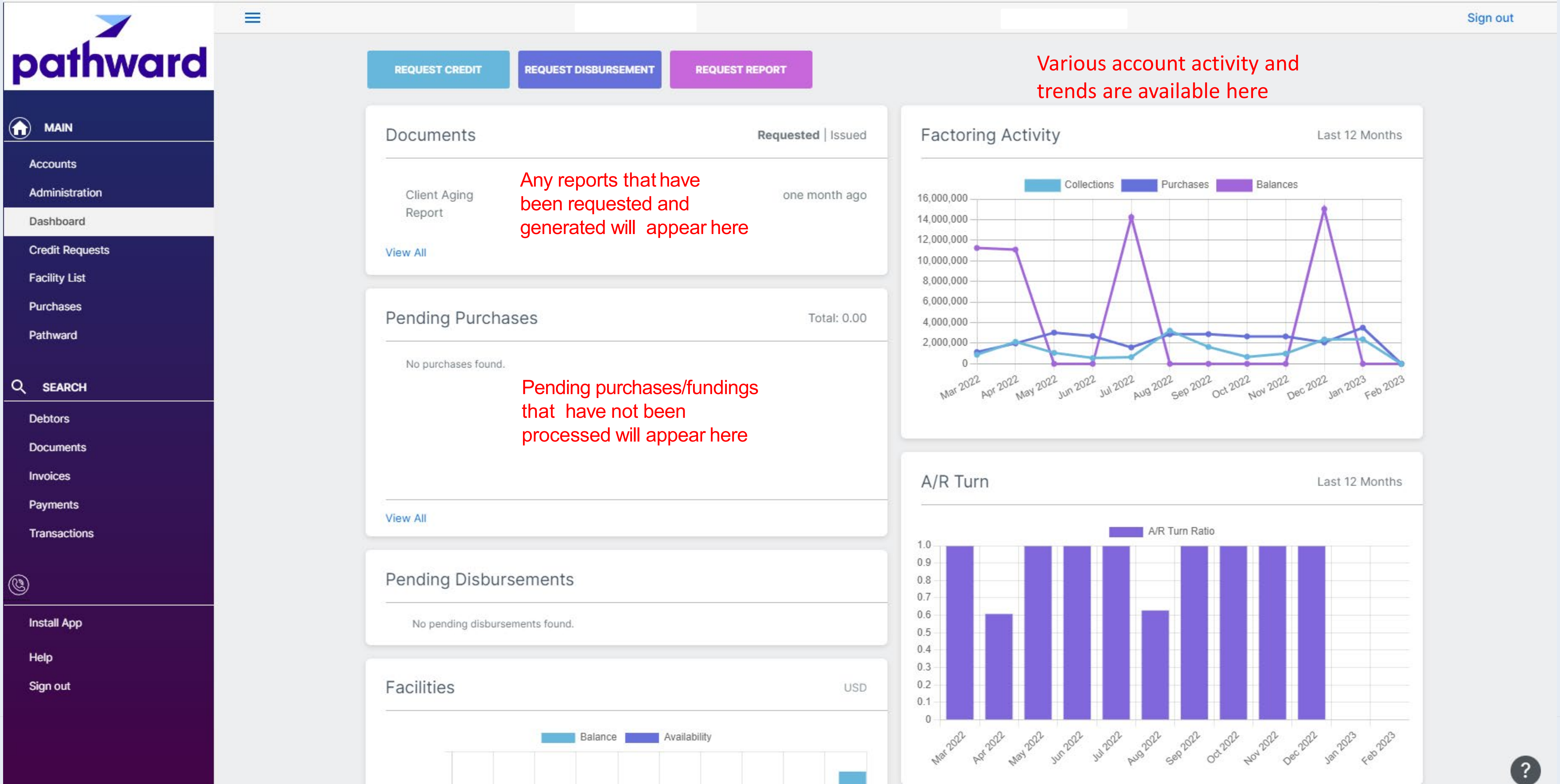


# Dashboard Upon Logging in

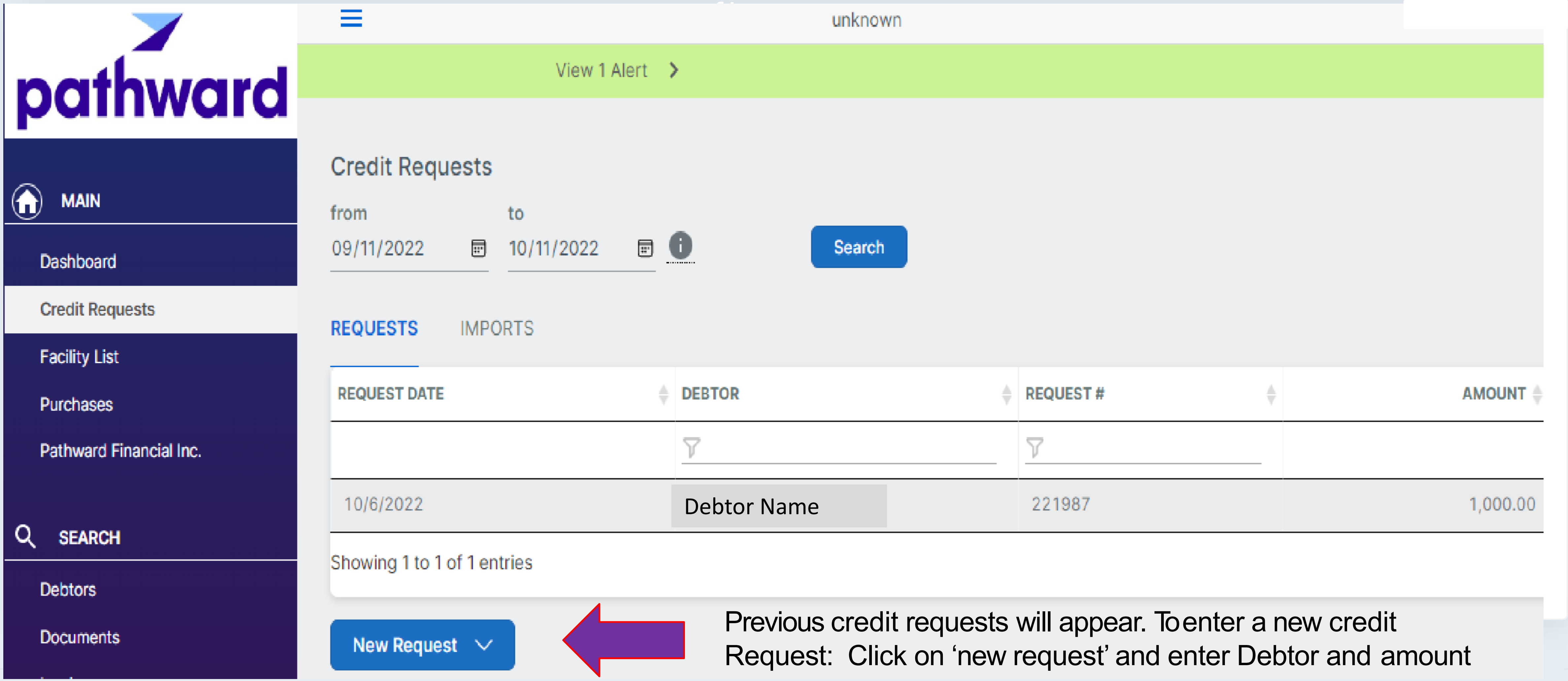



Shortcut links to request credit, reports, etc.

# Details of Dashboard



# Submit a Debtor Credit Limit Request




Previous credit requests will appear. To enter a new credit Request: Click on ‘new request’ and enter Debtor and amount

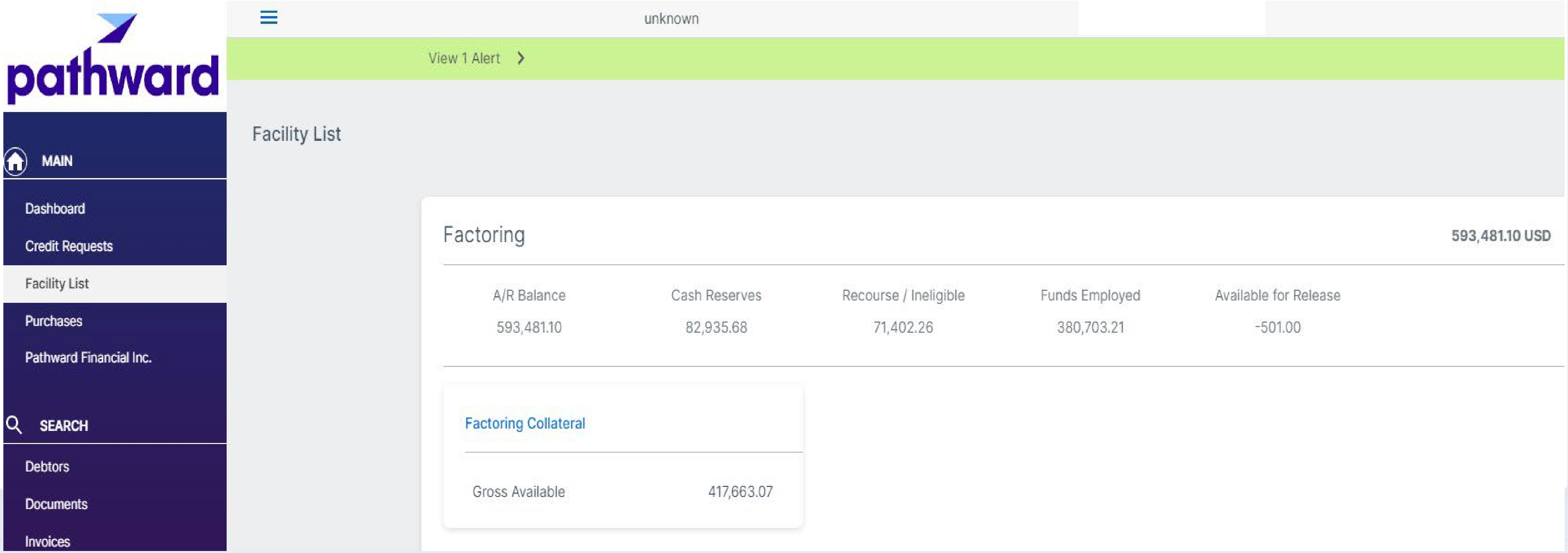




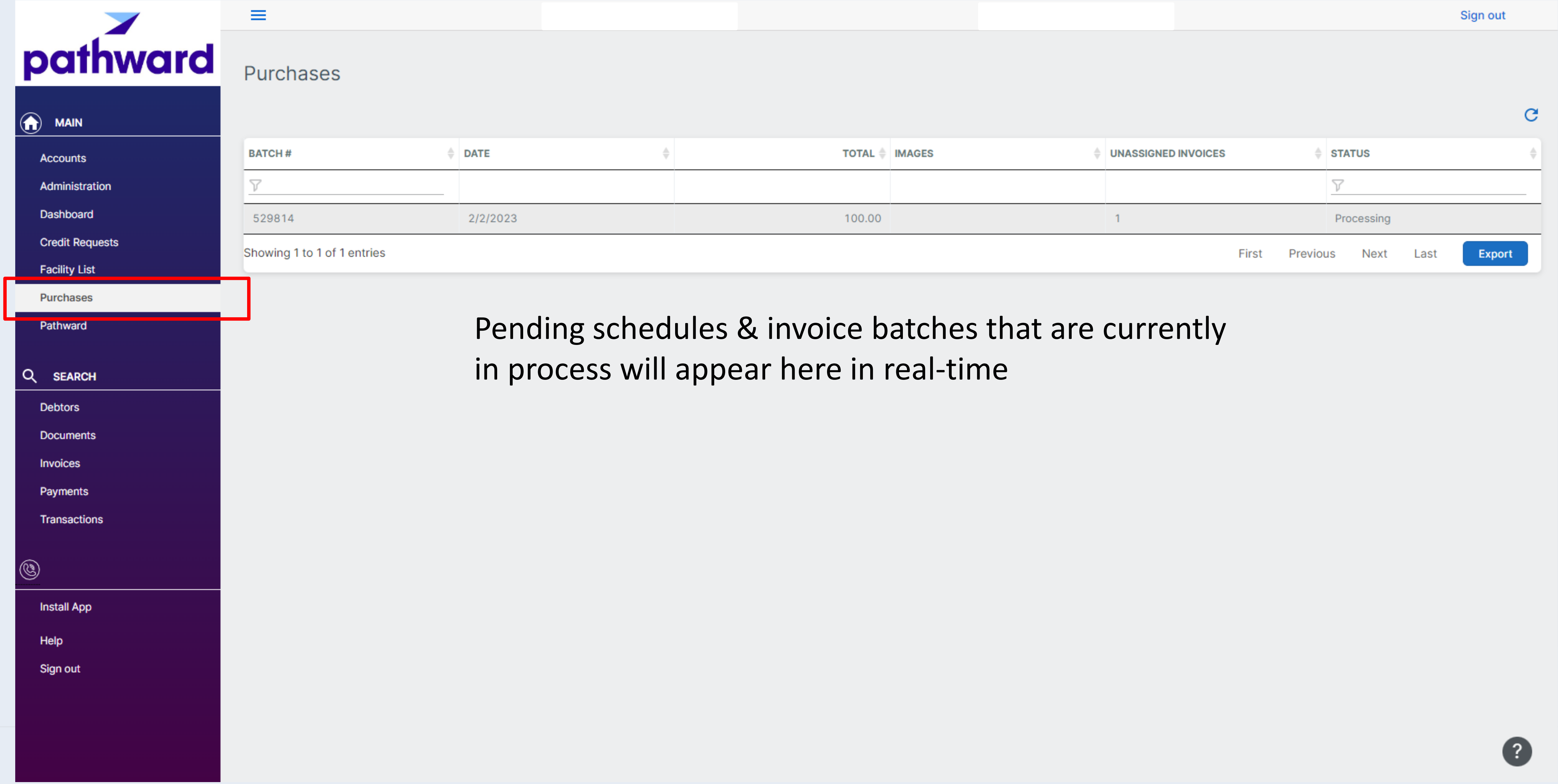
pathward

# Facility List

**The facility list will display current balances in A/R, Cash Reserve, Ineligible Invoices and Funds employed (current loan balance), and available funds.**

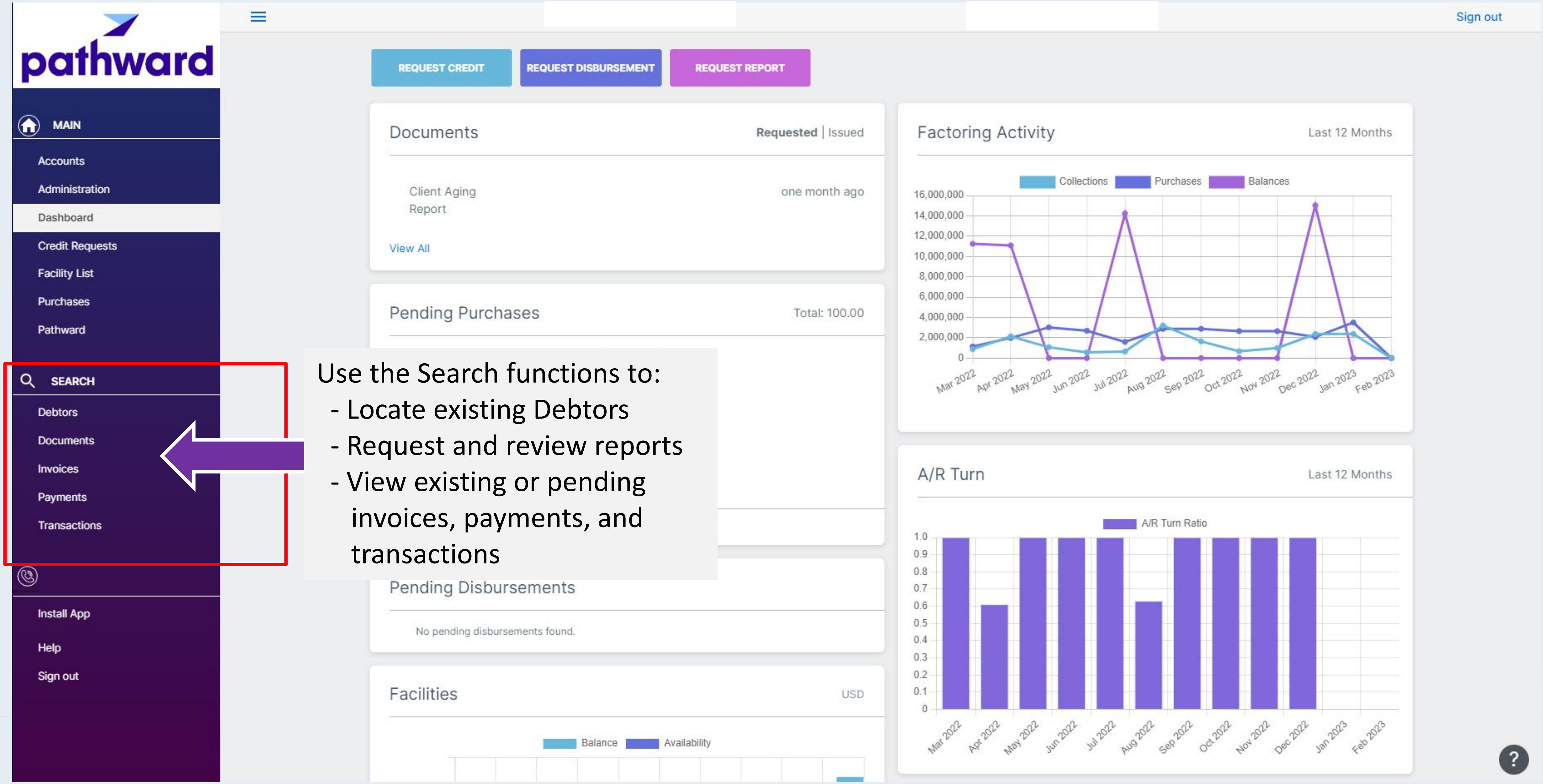


# Pending Schedules & Invoice Batches




Pending schedules & invoice batches that are currently in process will appear here in real-time

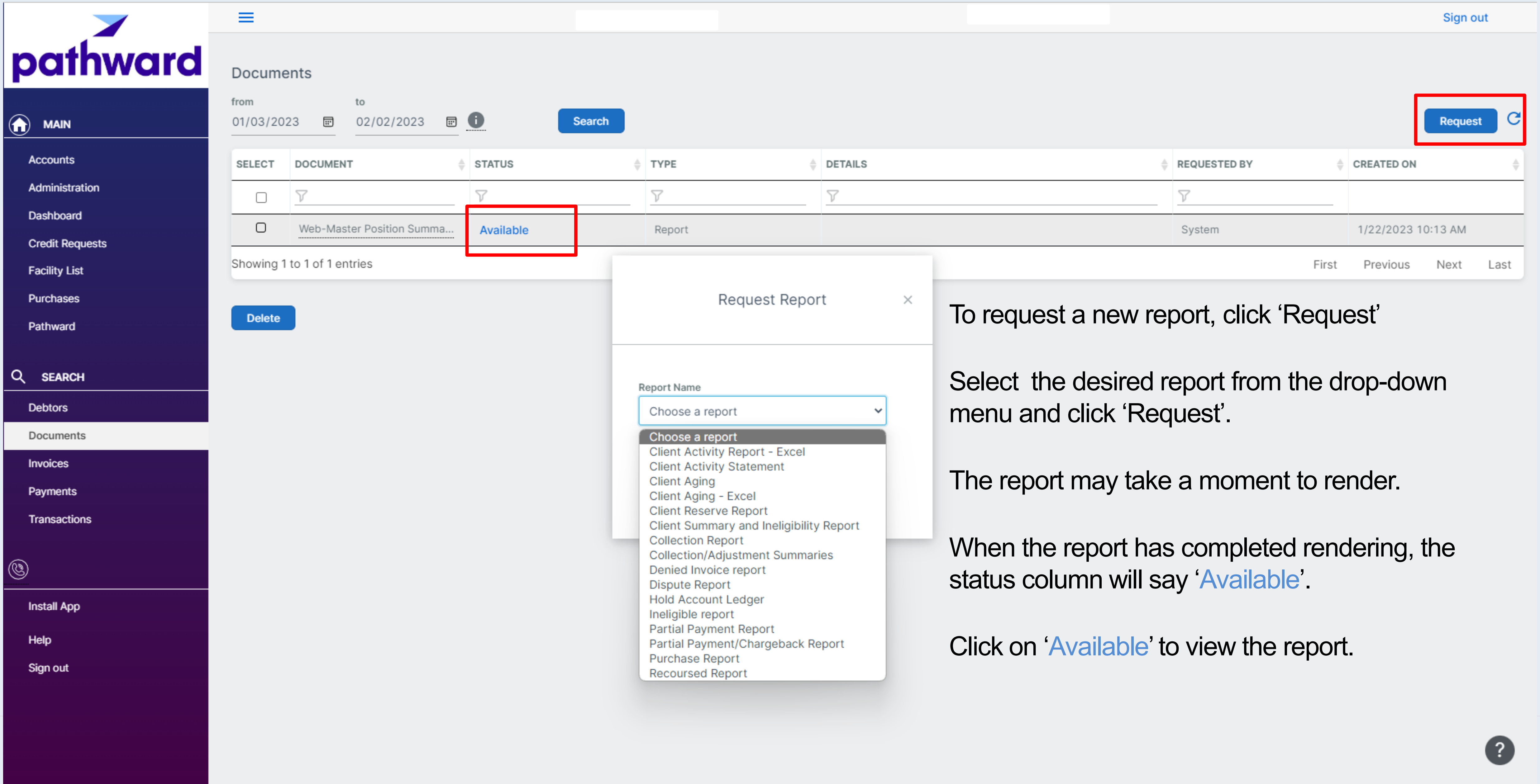
# Search Function




Use the Search functions to:

- Locate existing Debtors
- Request and review reports
- View existing or pending invoices, payments, and transactions

# Report Options




To request a new report, click ‘Request’

Select the desired report from the drop-down menu and click ‘Request’.

The report may take a moment to render.

When the report has completed rendering, the status column will say ‘Available’.

Click on ‘Available’ to view the report.

# Mobile Web Application Installation