

December 1, 2013

Managing Your Payment Options

Payment options for ProSuite are handled in the My Firm Billing tab's **Secure Payment Manager**. One of two Payment Options can be selected:

Invoice: Statements and invoices will be delivered via email on a monthly basis. A Statement contains all outstanding invoices and unallocated payments. The Invoice contains charges incurred for ProSuite in the previous month. You may also access these documents from the Account Summary tab.

Credit Card: Your credit card is debited when a transaction/file is created in ProSuite.

The Secure Payment Manager ensures the secure storage and management of your office's credit card information. Credit card information and payments are managed by Moneris, the largest secure processor of debit and credit card payments in Canada.

The credit card payment method provides the following advantages:

- Receive automatic notification when your card's expiry date is approaching
- Collect Rewards Program or Loyalty points from your credit card company
- Increase efficiency by reducing month end reporting and payment processing in your office
- Reduce use of stationary, postage and courier costs
- Easily reconcile transactions opened with charges incurred
- Feel secure knowing that your payments are managed by Moneris, the largest secure processor of debit and credit card payments in Canada

Managing Payment Methods

Activating the Credit Card Payment Option

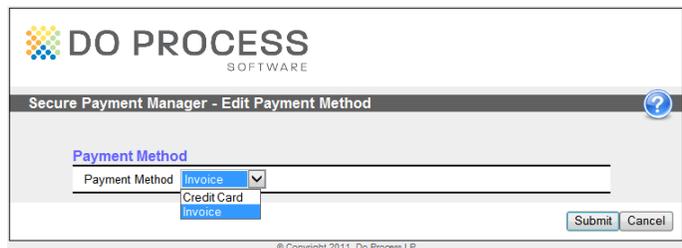
Step 1 – Select credit card as the payment method

In the **Payment Method** section of the Secure Payment Manager, select the **Edit** link.



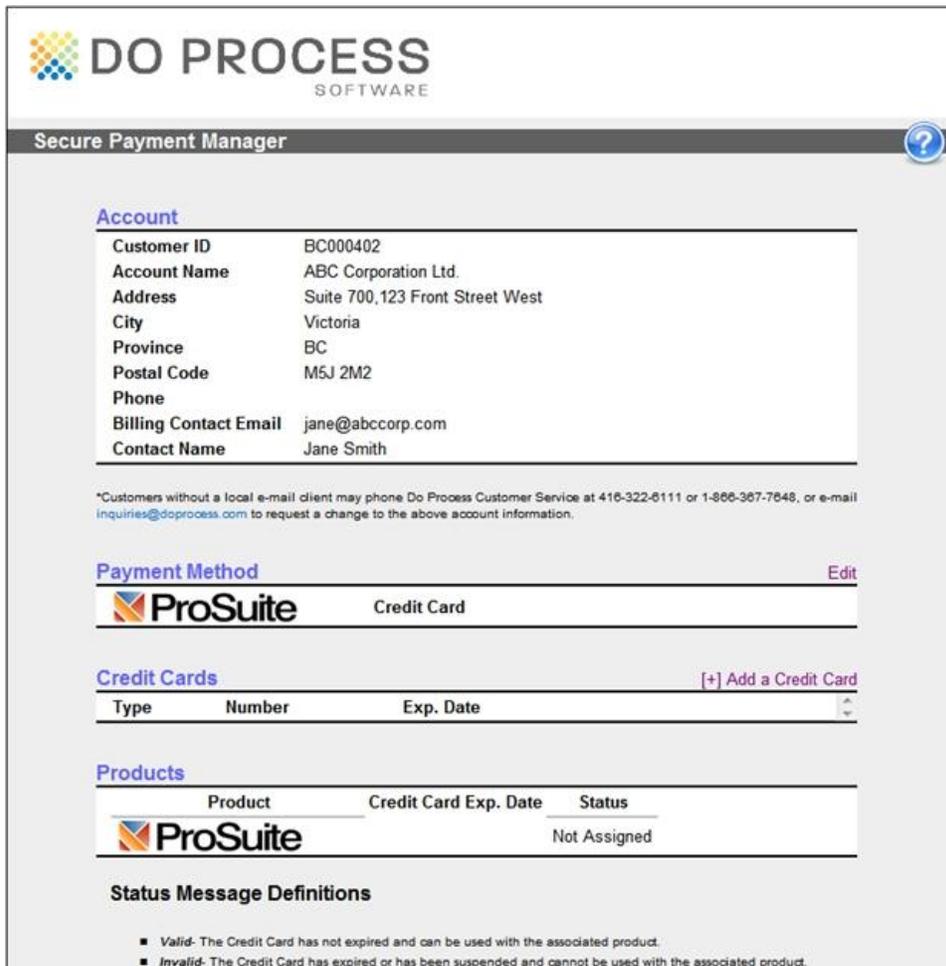
The screenshot shows the 'Secure Payment Manager' interface. At the top, there is a header with the 'DO PROCESS SOFTWARE' logo and a help icon. Below the header, the page is titled 'Secure Payment Manager'. Underneath, there is a section for 'Account' details, including fields for Customer ID, Account Name, Address, City, Province, Postal Code, Phone, Billing Contact Email, and Contact Name. A small note at the bottom of this section provides contact information for customers without a local e-mail client. Below the account details, there is a 'Payment Method' section with a dropdown menu currently set to 'Invoice' and an 'Edit' link.

On the **Edit Payment Method** popup, select credit card from the drop down menu.



The screenshot shows the 'Edit Payment Method' popup window. The title bar reads 'Secure Payment Manager - Edit Payment Method'. The main content area has a 'Payment Method' section with a dropdown menu. The dropdown is open, showing 'Invoice' as the selected option, with 'Credit Card' and 'Invoice' as other visible options. At the bottom right of the popup, there are 'Submit' and 'Cancel' buttons.

The Secure Payment Manager screen changes to reflect the credit card payment method.



DO PROCESS SOFTWARE

Secure Payment Manager

Account

Customer ID	BC000402
Account Name	ABC Corporation Ltd.
Address	Suite 700, 123 Front Street West
City	Victoria
Province	BC
Postal Code	M5J 2M2
Phone	
Billing Contact Email	jane@abccorp.com
Contact Name	Jane Smith

*Customers without a local e-mail client may phone Do Process Customer Service at 416-322-6111 or 1-866-367-7648, or e-mail inquiries@doprocess.com to request a change to the above account information.

Payment Method Edit

 Credit Card

Credit Cards [+] Add a Credit Card

Type	Number	Exp. Date

Products

Product	Credit Card Exp. Date	Status
		Not Assigned

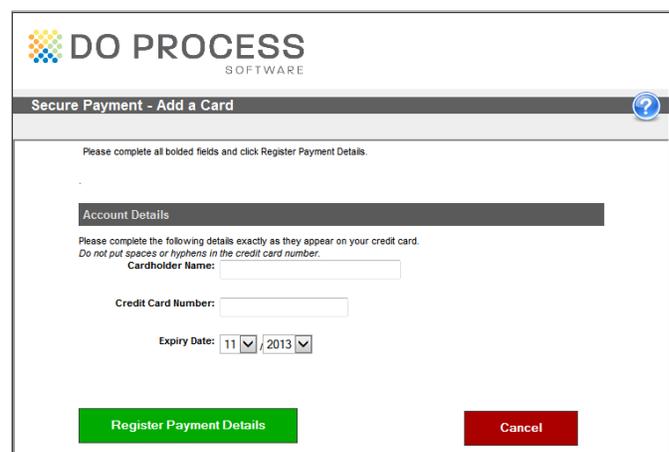
Status Message Definitions

- Valid- The Credit Card has not expired and can be used with the associated product.
- Invalid- The Credit Card has expired or has been suspended and cannot be used with the associated product.

Step 2 - Add Credit Card

In the Credit Cards section of the Secure Payment Manager window, select the **Add a Credit Card** link to access the **Add a Card** popup.

In the Add a Card popup, enter the information for the credit card and click **Register Payment Details** when you have finished. When the Secure Payment Manager window reopens, the credit card (masked) and its expiry date are displayed.



DO PROCESS SOFTWARE

Secure Payment - Add a Card

Please complete all bolded fields and click Register Payment Details.

Account Details

Please complete the following details exactly as they appear on your credit card.
Do not put spaces or hyphens in the credit card number.

Cardholder Name:

Credit Card Number:

Expiry Date: /

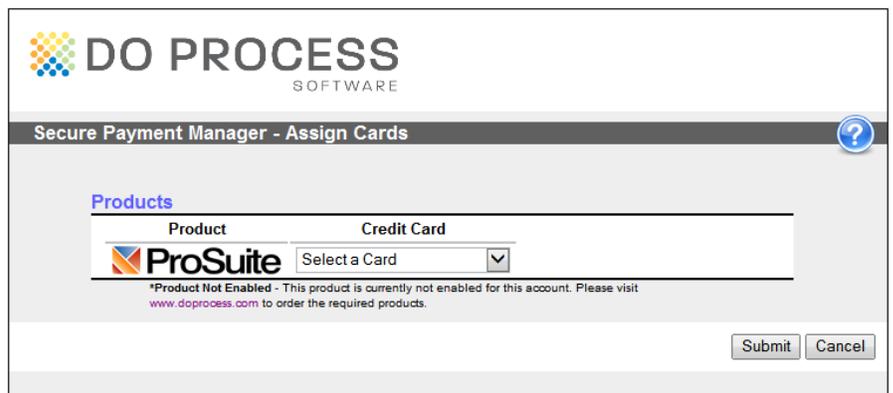
Register Payment Details **Cancel**

Notes: The system will not accept expired credit cards. VISA® and MasterCard® are accepted by Do Process. You do not need to specify which credit card you are using; the system detects the card from the number.

Step 3 - Assign Credit Card

In the Products section of the Secure Payment Manager window, click **Edit** to access the **Assign Cards** popup. Select the card from the drop down list and click **Submit**.

When the Secure Payment Manager window reopens, the assignment is displayed, along with the status of the card:

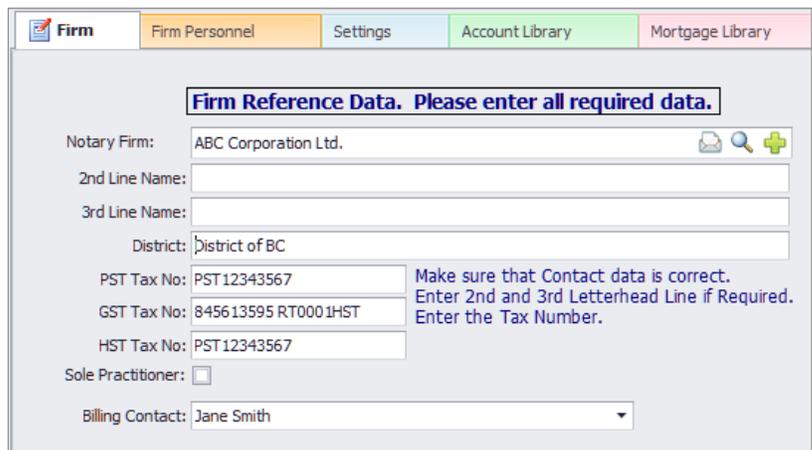


- **Valid** – The credit card has not expired and can be used
- **Invalid** – The credit card has expired or has been suspended and can't be used
- **Not Assigned** – A credit card has not been assigned. Please select a card

Viewing and Editing Your Office's Billing Contact Information

The **My Firm - Firm** tab contains a field for you to identify your office's billing contact. This field is pre-populated with names from the **My Firm - Personnel** tabs.

Select the name of the person who is the billing contact for your office, and then save. If the billing contact is not in the selection list, add this person's name and email in the



appropriate Personnel tab and then return to the Firm tab. This person will now appear in the billing contact drop down for selection.

If you require further assistance with managing your payment options, please contact Customer Service at 1.866.367.7648 during business hours.