

Billing Center

Make a Payment

“Log In” to the Dashboard. From the home page click “**Billing Center.**” All of your billing accounts will be made available. Make a payment by clicking the “**Manage Payment**” button for the account of your choice. Any unpaid invoices will be displayed. Here you can make a one-time or scheduled payment.

1. Under the “Pay” column, click in the box associated with the invoice of your choice to pay. To pay multiple invoices, you may choose to check each box individually or simply click “**Select All.**”
2. Click “**Next.**”
3. Select a payment option of either “**Credit Card**” or “**eCheck.**”
4. Fill in the corresponding account information.
5. Choose either “**Pay Now**” or “**Pay Later**” and select a date.
Note: You must click the “Save To Wallet” option to schedule a payment.
6. Click “**Submit.**”
7. A confirmation page will appear and a payment confirmation email will be sent.

Scheduled Payments

To view or cancel scheduled payments, mouse over your company name to reveal a dropdown list of account options. Choose “**Scheduled Payments.**”

View Scheduled Payment Details:

1. Click the “**Payment Number.**”
2. You will have the option to print or download a .pdf of the Paid Invoice List.

Cancel a Scheduled Payment:

1. Click “**Cancel**” next to the corresponding payment.
2. You will receive a warning message asking you to confirm the cancellation. Click “**OK.**”

Invoice History

Select “**Invoice History**” from the menu options. A list will be displayed.

Advanced Search:

Click the “**Advanced Search**” button to enter the invoice number or filter by a specific date range.

View Invoice:

Click on any “**Invoice Number**” of your choice to view invoice details and payments applied to that invoice.

Payment History:

New users MUST REGISTER for Dashboard prior to gaining access to the Billing Center. The Billing Center can only be accessed by the billing contact listed on your account. This would be the email address that you currently use to receive your monthly invoices.

You can register here:

<https://dashboard.conferencegroup.com>

Contact Us Mon-Fri 8:30AM - 5PM (EST)

Call (888) 709-7060

Email billing@conferencegroup.com

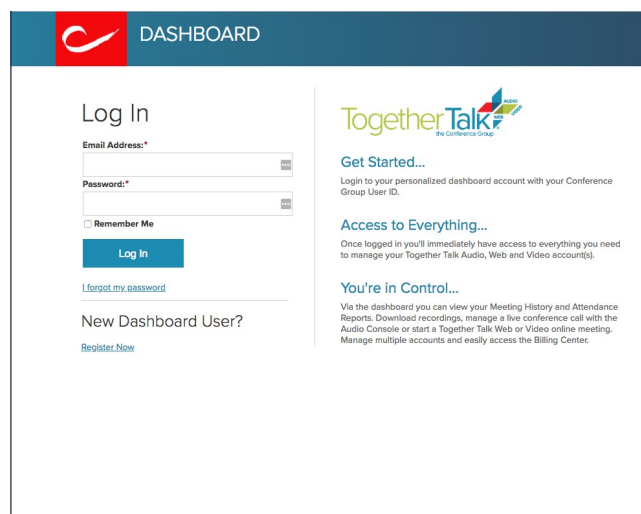


Figure A. Billing Center Login

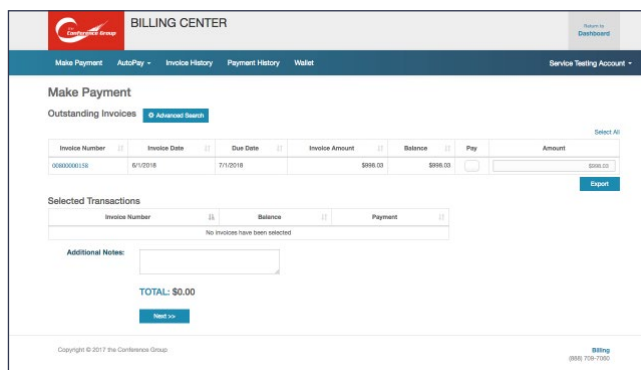


Figure B. Billing Center - Main Page

Click the **“Transaction Number”** to view the transaction details.

Wallet

Select **“Wallet”** from the menu options to securely add and store your credit card and bank account information to easily process your payments.

Add New Entry:

1. Click **“Add New Entry”** and select Credit Card or E-Check.
2. Give the credit card or banking account a name in the **“Wallet ID”** field.
3. Fill in the corresponding account information.
4. For credit card entries, check **“Set As Default,”** if this will be the main form of payment.
5. Click **“Save.”**

Note: Please make sure to update an existing “AutoPay” with the “New Wallet Entry.”

Delete Wallet Entry:

1. Delete the account from your wallet entirely by clicking the **“Trash Icon.”**
2. A message will be displayed asking to confirm your request. Choose **“OK”** or **“Cancel.”**

Note: You cannot delete a “Wallet Entry” if it has a Scheduled Payment or AutoPay associated with it.

AutoPay

Mouse over **“AutoPay”** from the menu to reveal a dropdown list of autopay options. You can create a new AutoPay contract to setup automatic reoccurring monthly payments for your account(s) or view an existing one.

NEW AutoPay Contract

To schedule a new AutoPay contract, click **“New AutoPay Contract”** from the dropdown list and fill in the fields appropriately:

- **Memo**
Note Field – This field can be personalized to your liking.
- **First Payment Date**
This is the first date your account will be charged.
Note: It will default to the current date. We recommend choosing a date between the 10th and 25th of the month.
- **Payment Method**
Click the magnifying glass to select your method of payment from an existing wallet or click the **“Add New Entry”** button. Please see Wallet instructions above.

Invoice Number	Invoice Date	Last Payment Date	Amount
0080000107	5/1/2018	5/18/2018	\$23.99
0080000106	4/1/2018	4/4/2018	\$10.60
0080000105	3/1/2018	4/4/2018	\$6.36
0080000104	2/1/2018	2/23/2018	\$6.36
0080000103	1/1/2018	2/23/2018	\$6.36
0080000102	12/1/2017	12/15/2017	\$6.36
0080000101	1/1/2017	1/10/2017	\$13.01
0080000100	10/1/2017	1/25/2017	\$6.36
0080000109	8/1/2017	8/30/2017	\$6.36
0080000108	8/1/2017	8/22/2017	\$6.36

Figure C. Invoice History

Figure D. Add Wallet

Figure E. New AutoPay Contract

View Existing AutoPay Contract

1. Click the “Contract Number” you wish to view or edit.
2. Click the “Edit” button to change any of the above fields.
3. Click “Save” when your editing is complete.

Account Summary

Mouse over your company name to reveal a dropdown list of account options. Click “Account Summary.” The Account Summary page presents a broad overview of your account.

Account Summary displays:

- Outstanding Balance / Invoices
- Payment History
- Scheduled Payments

The screenshot displays the 'Account Summary' page in the Billing Center. At the top, there is a navigation bar with options like 'Make Payment', 'AutoPay', 'Invoice History', 'Payment History', and 'Wallet'. The main content area is divided into three sections:

- Outstanding Invoices:** A summary box showing 'TOTAL BALANCE DUE: \$998.03', 'TOTAL AVAILABLE CREDIT: \$0.00', and 'NET BALANCE: \$998.03'. Below this is a table with columns for 'INVOICE #', 'DATE', 'DUE DATE', 'TOTAL', and 'BALANCE DUE'. One invoice is listed with ID '00000002158' due on 7/1/2018 for \$998.03. A link 'View All Open Invoices' is present.
- Payment History:** A table with columns for 'PAYMENT NUMBER', 'TYPE', 'DATE', and 'AMOUNT'. It lists five credit memos from 5/18/2018 to 2/23/2018 with amounts ranging from \$23.99 to \$6.36. A link 'View All Payment History' is at the bottom.
- Scheduled Payments:** A table with columns for 'SCHEDULED DATE', 'PAYMENT NUMBER', 'AMOUNT', 'PROCESS STATUS', and 'SOURCE'. It shows two scheduled payments on 6/26/2018 and 6/25/2018 for \$0.50 each, with a 'View Complete List' link.

At the bottom of the page, it says 'POWERED BY HOKU'.

Figure F. Account Summary