



Payment Portal

The Acumatica Payment Portal puts payment control at your customers' fingertips and streamlines payment processing. Customers can self-manage their accounts and control the timing and method of their payments. They can access invoices, choose a payment option, and submit payments online at their convenience.

- Display open balances on the portal to remind customers to pay
- Automatically adjust invoices and alert customers when processed
- Enable customers to pay all or selected invoices
- Present cash discount options to encourage full payments

Key business benefits

- Enable customers to access invoices, choose a payment option, and submit payments.
- Customize instructions and responses for customers.
- Adjust invoices and notify clients when a payment is processed.
- Support payment flexibility, partial payments, and preferences.
- Promote and apply discounts for cash payments.
- Enable customers to select invoices to pay or pay all invoices.

Collect Payments Faster and Improve Customer Satisfaction

Customers can submit payments, customize the amount, and take advantage of cash discounts instantaneously without leaving the Self-Service Portal. Now they can access their accounts, place orders, and submit payments from the same application. Automated email templates confirm receipts and foster open communication.

STREAMLINE PAYMENT PROCESSES AND RESPONSES

Acumatica enhanced its popular Customer Self-Service Portal to optimize the payment experience for ERP users and their customers.

- Tailor the Portal's settings with different options and instructions.
- Publicize discounts for full payments.
- Leverage email templates to create confirmation emails and automatically distribute them when customers submit payments.
- View up-to-date customer account activity and outstanding balances on the centralized system. Confirmed payments update accounts in Accounts Receivable.

IMPROVE CUSTOMER EXPERIENCE

Customers can use the Portal to self-manage their account from checking order status to paying bills. Empower customers with the ability to:

- View their invoices and choose to select which ones to pay.
- Select a payment method and quickly submit payments.
- Take advantage of cash discounts.
- Make installments or partial payments based on the Portal's instructions.
- Receive email confirmations when payments are posted.

“Acumatica is easy to learn, and I find it very intuitive. You can do a simple keyword search and the results are automatically categorized. It's a one-stop shop. I can see everything I need all in one dashboard in about 15 seconds.

—Craig Matusinski, E-Commerce and Social Media Director, Kevins Worldwide

For more information contact Protelo at www.protelo.com | 916-943-4428

Customer Self-Service

Give customers access to account information and enable them to self-manage their orders and payments.

Flexible Payment Options

Enable customers to view payments, choose the payment method and amount, and then submit payments directly on the Portal. Customers can opt to pay the outstanding balance for all invoices, choose one to pay, or make partial payments.

Discounts for Cash Payments

Allow Acumatica users to offer customers discounts off their outstanding bills when they make full cash payments on the Portal.

Customizable Portal Settings

Enable ERP users to create portal settings that reflect their desired payment options. Users can click designated fields to offer partial payments, discounts, and options to select invoices to pay or pay all outstanding invoices.

Online Instructions

Allow users to personalize payment instructions for customers and post the instructions on the Portal.

Email Templates

Provide email templates for users to customize and use as confirmation emails. Automatically send confirmation emails to customers when payments are cleared.

Account Receivable (AR) Integration

Integrate with Acumatica's Accounts Receivable module; update AR data when payments are received and reflect approved payments in AR and Portal.

Account Overview

Give customers access to account history, invoices, balances, due dates, payments received, and amount owed.



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ABOUT ACUMATICA

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

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