

Invoice Gateway Customer Enrollment

Billtrust is the Stock Building Supply provider of Statement and Invoice delivery. They also host our Customer Portal where you can view your invoices and statements 24 hours a day 7 days a week. In addition the portal allows you to pay your bills on line and download invoices directly into some small business accounting software such as Peachtree, QuickBooks, and Timberline. To enroll in the Stock Building Supply Invoice Gateway follow the instructions below. If you have questions or need help contact your local Stock Building Supply credit department.

Customer Enrollment from Stockbuildingsupply.billtrust.com

- 1- Launch the website above
- 2- From the login page click on the "Sign Up Now" Button

The screenshot shows the Billtrust customer portal interface. On the left, a 'Welcome!' message is displayed above a laptop icon showing an envelope. Below this, text states: 'Please sign in with your username and password. If you do not have a username, please enter your account number and password. If you do not have a username you will be prompted to create one.' Further down, it says 'Online Billing delivers your bills to you electronically and allows you to view all bill history for the account'. At the bottom of this section are three icons: a monitor for 'View and pay your bills online', a padlock for 'Your account is always protected', and a globe for 'Access anywhere'. On the right side, there are three main sections: 1. 'Sign In To Your Account' with input fields for username and password, a 'Remember My User Name' checkbox, and links for 'Forgot Your User Name?' and 'Forgot Your Password?'. A green 'Sign In' button is at the bottom right of this section. 2. 'Need an Account?' with a green 'Sign Up Now' button circled in red. 3. 'Make A One Time Payment' with a green 'Pay' button.

3. Enter required information and set up security questions. Your Enrollment token is printed at the bottom of each invoice and statement. If you have not yet purchased from Stock Building Supply you will have to contact your local credit department to obtain the Enrollment token

Sign Up With Invoice Gateway

*All fields are required unless otherwise indicated as "optional"

Name:	<input type="text" value="John Doe"/>
Account Number:	<input type="text" value="183665"/>
Enrollment Token:	<input type="text" value="12L3Tz6"/>
User Name:	<input type="text" value="jdoe"/>
Password:	<input type="password" value="••••••"/>
Confirm Password:	<input type="password" value="••••••"/>
Email Address:	<input type="text" value="jdoe@yahoo.com"/>
Security Question 1:	<input type="text" value="What is your favorite hobby?"/> 
Answer 1:	<input type="text" value="Playtime"/>

4. Check
5. Click "Sign Up"

I agree to the [Subscriber Agreement](#)

Sign Up

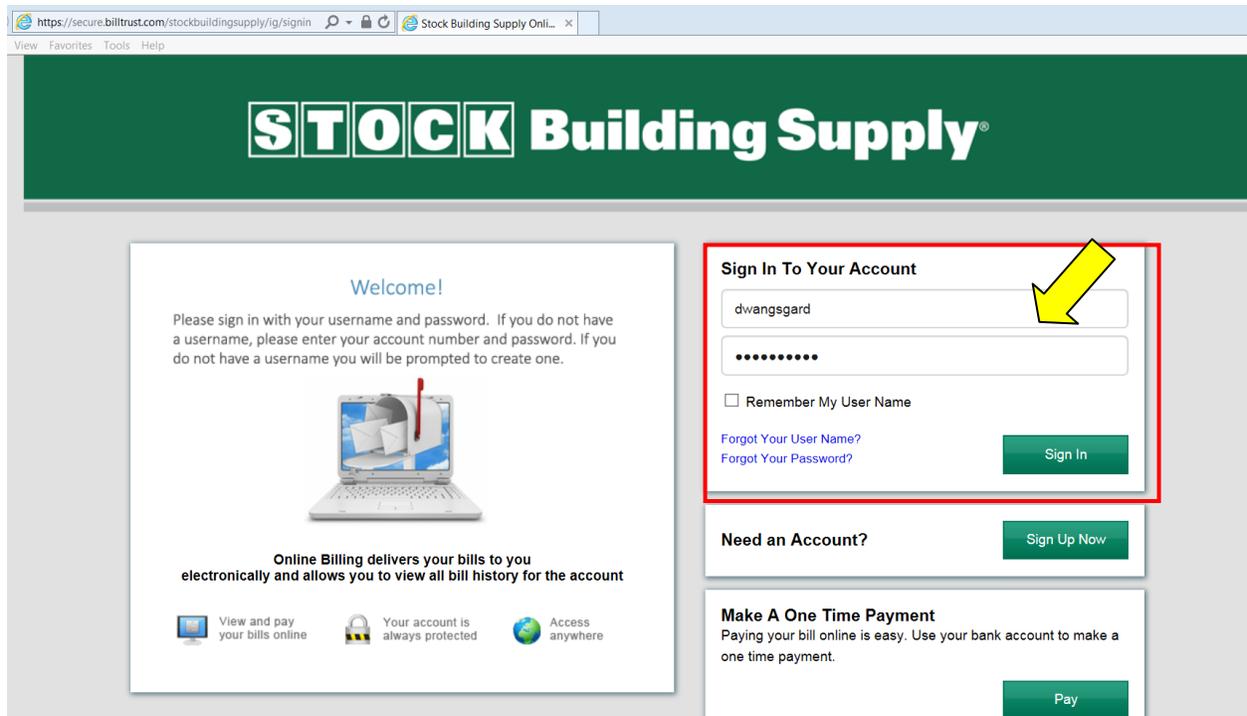
You are now enrolled

Note: Customers should set up a contact in their email contacts using the Stockbuildingsupply.billtrust.com. If they have a trusted sites, or safe sender site, also add this email address to those lists. This will prevent the spam filter from stopping emailed invoices and statements from getting to the customer.

You can now access your account by going to the [Stockbuildingsupply.billtrust.com](https://secure.billtrust.com/stockbuildingsupply/ig/signin) website. You will use the user ID and password you just set up.

Enter them in the fields below. Once you have logged in successfully you can follow the instructions below to view options and settings for your account.

1. Enter the user ID and password you created in the previous step
2. Click Sign In



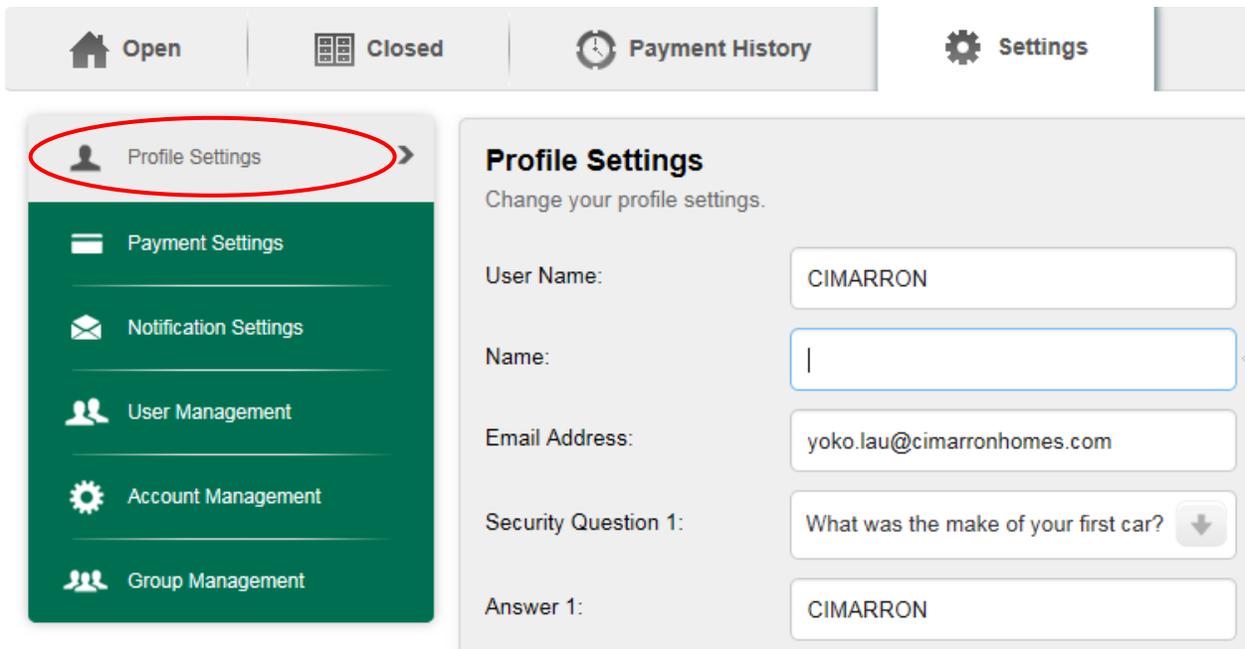
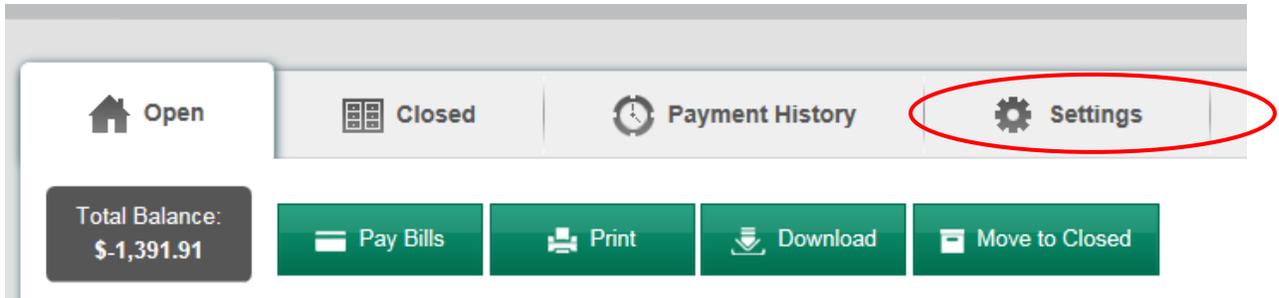
The Home page (or Open tab) will now be displayed. From this tab you can see your balance as of last night, see open invoices and statements.

- Click the Closed tab to see closed invoices (only from the date of enrollment in Invoice Gateway)
- Click the Payment History tab to see pending or historical payment data (only if payments are made in the portal)
- Click Settings to see other set up options for your account such as your security questions, payment options and notification options.

From the Home page (Open tab) Click on Settings

Click on Profile Settings

Here you will be able to change your user name, password, security questions and email address. Your email address will be your delivery address for invoices and statements



Change information and click save

Payment Settings

Payment Settings allows you to add your bank account information and control when invoices move to the closed tab.

From the Home Page (Open tab) click settings

Click Payment Settings

Click Add Bank Account and then enter all required bank information.

This information is stored by Billtrust on secure sites that are government certified for your protection. Once the information is entered it is encrypted and only the last four digits of the bank account will be seen. You can set up multiple bank accounts and link them to particular jobs if you want to. For more information contact your local credit department.

When you make a payment in the portal your invoices will automatically move to the closed file. If you do not want them to move to the closed file

Click on payment options and remove the check mark from the auto close invoice line.

The screenshot displays the STOCK Building Supply portal interface. At the top, the logo 'STOCK Building Supply' is visible. Below the logo, there is a navigation bar with tabs for 'Open', 'Closed', 'Payment History', and 'Settings'. The 'Settings' tab is circled in red. On the left side, there is a sidebar menu with options: 'Profile Settings', 'Payment Settings', 'Notification Settings', 'User Management', 'Account Management', and 'Group Management'. The 'Payment Settings' option is circled in red. The main content area is titled 'Payment Settings' and includes a sub-header 'Manage your payment settings, payment accounts and auto-pay settings.' Below this, there are three tabs: 'Payment Accounts', 'Auto-Pay Settings', and 'Payment Options'. The 'Payment Options' tab is circled in red. Under the 'Payment Options' tab, there is a table with the following data:

Friendly Name	Account Type	Group
My Bank Account	Bank Account	Default Group

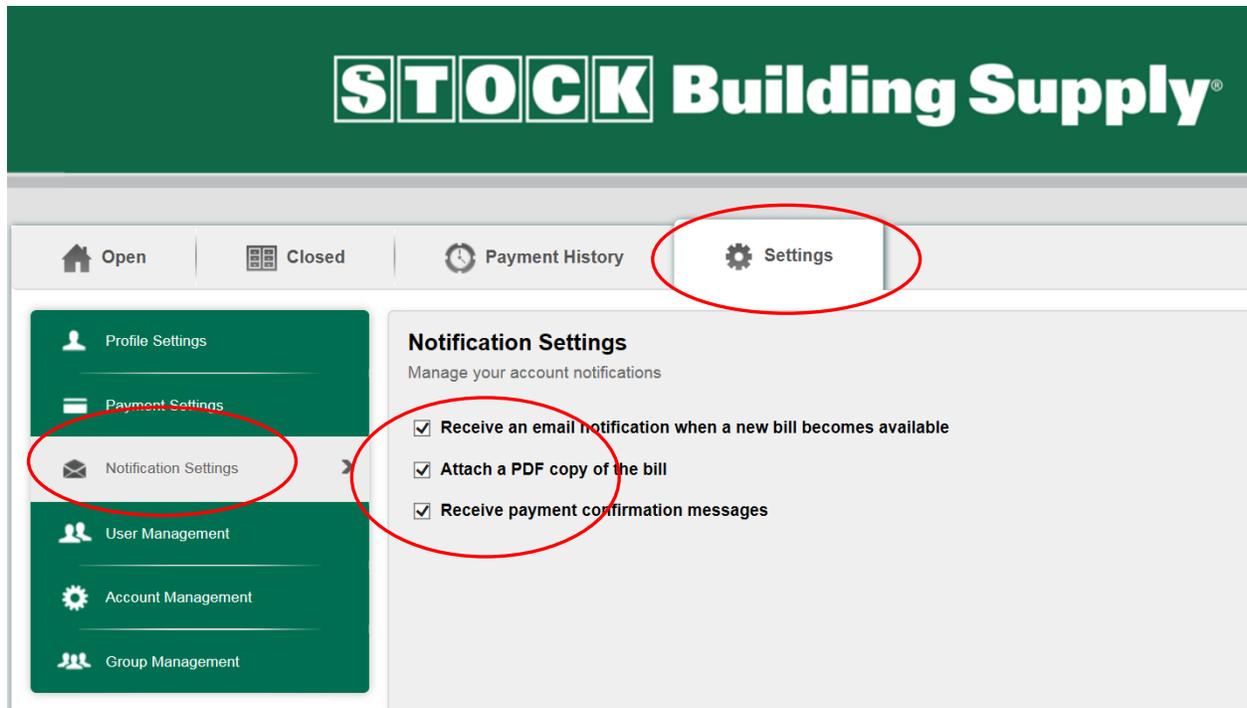
At the bottom of the page, there is a green button labeled 'Add Bank Account', which is circled in red.

Notification Settings

Click settings

Click Notification settings

Choose your delivery options for invoices and payment confirmation.



User Management

The user management button will allow you to add users to your account. You will be able to control access to what they can see. You can allow them to see invoices, see payments, or change information. Setting up a new user is easy to do.

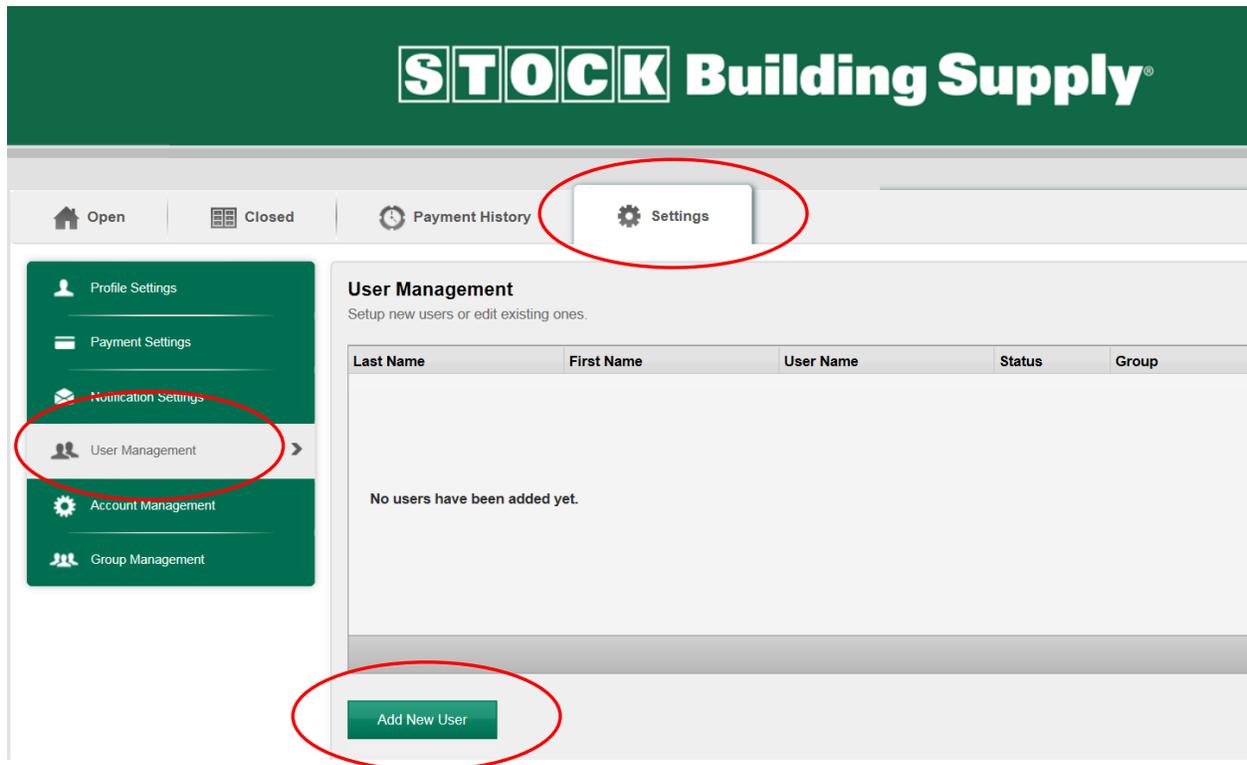
To set up a new user;

Click Settings from the Home Page (Open tab)

Click User Management button

Click Add New User

Choose permissions and click save



Account Management

If you have multiple accounts with Stock Building Supply, you can link them together so you only have to have one user ID and password to access all your invoices. Invoices will not be mixed together but after you login all invoice numbers will display so you can pick which account you want to see. Linking accounts together may affect your login to the SBS web portal which is different from this portal so it is recommended that you contact your credit department for help in linking accounts.

Group Management

The group management function allows you to set up different projects and tie them to particular users. This function also allows you to set up separate bank accounts for each project. For more information contact your local credit department.

Making Payments Through the Invoice Gateway Portal

Making Payments through the portal is easy and convenient. You can make payments anytime of the day or night. However payments are only transmitted once a day at 3:00 pm EDT Monday through Friday. Payments made after the cut off or during the weekend will be settled the next business day.

Once a payment has been made you will see the pending payment in the payment history tab. Once the payment is confirmed by the bank the status will change to complete. Invoices will then move from the open tab to the closed tab. It may take 24 hours depending on the time of the payment for this process to happen.

You will be asked to check off the invoices you are paying. It is recommended that you filter the information by sorting the order of the invoices being paid either by date, a date range, a job , or invoice number before you start the payment to make checking off the invoices faster.

If there are too many invoices to check off you may also make a lump sum payment and put a note in the comments on what is being paid. Note a particular job for a date range etc.

To ensure the proper cash application it is recommended that you check off the invoices. Otherwise if the payment comments are not clear the cash app team will have to call you for directions. They are not allowed to make a decision on how to apply the payment without your direction.

To Make a Payment

From the Open tab, check off the invoices they wish to pay.

Click on the Pay Bills Button

Note: If this is the first payment the customer makes they will be prompted to add the bank account information. It will be stored for future use on the account in a secured format. We can only see the truncated last four digits of the account number. The customer may also store additional bank accounts and tie them to different projects by clicking on Settings then Payment settings.

Open Closed Payment History Settings

Total Balance: \$9,043.50

Pay Bills Print Download Move to Closed

<input type="checkbox"/>	PDF	Note	Disp...	Group	Invoice #	Doc Type	Inv Date	Due Date	Total Due	Disc Amt	D
<input checked="" type="checkbox"/>				Default Group	52295041-00	Invoice	06/05/2015	07/10/2015	8740.82	0.00	
<input checked="" type="checkbox"/>				Default Group	52290307-00	Invoice	06/01/2015	07/10/2015	302.68	0.00	

Once information for the bank account has been added (first payment only) and invoices checked off all paid invoices will appear. You will be able to change the dollar amount on any invoice before clicking the next button. If you are short paying an invoice you will be prompted to enter the reason for the short paid invoice. You can either type the reason or select one from the drop down box, then click the Next Button.

Payment Details Authorization Confirmation

Bank account payments that are made after 3:00 pm Eastern will be scheduled for the next business day.

Payment Account: My Bank Account Payment Date: 06/15/2015 Show Rows: 5

Account	Invoice #	PO #	Inv Date	Due Date	Discount	Discount Date	Inv Amt	Disputed	Amt Paid	Open Balance	Pay Amt
258112	52295041-00	TRUSSES	06/05/2015	07/10/2015	0.00		8740.82	0.00	0.00	8740.82	8740.82
258112	52290307-00		06/01/2015	07/10/2015	0.00		302.68	0.00	0.00	302.68	302.68

(USD) Total Amount: \$9,043.50

Cancel Next

You will be asked to authorize the payment. Once you click authorize you will see the confirmation page and number. You can print this for your records but unless you have turned off the payment notification option in your notification settings you will get an email that the payment has been made.

1 Payment Details **2** Payment Account **3** Confirmation

Your payment(s) have been scheduled to post according to the account's remittance addresses.

A confirmation email will be sent to graysondarehomes@verison.net with the details of this payment.

Confirmation number	9272267665065
Account Number	202088
Payment Method	Checking Account
Total Amount	\$416.55
Payment Date	05/06/2015
Payment Made	Success - Payment has been made.

[Print Confirmation](#)

[Done](#)

If you have questions not covered in this guide please contact your local credit department.