

HOW TO SEND AN INVOICE IN SMART HUB

VERSION 1





SMART Hub Dashboard

On the SMART Hub dashboard, a user can send an invoice or manage a receivable through the 'Invoices/ Receivables' tab on the left-hand panel, this will take the user to the 'Receivables Overview.'

SMART Hub	←	Hello, Johnny Anderson						🖉 🖨 Big Kahuna Burger I	Ltd. 🗘 🦉
Dashboard		Dashboard							
Bills/Payables	12	Receivables Metrics							
Vendors		Total number of receivables in pro	gress	Total value of \$22 178	receivables in progre	55	Tota	value of overdue receivables	
1 Invoices/Receivables	3			•==,,,,,				,200	
Customers		View all →		View all \rightarrow			View all \rightarrow		
👯 Configurator									
③ Settings	~	Receivables Overview Z2 Receivables	sh					Q. Search	
Business details		Ready to invoice 22 In progress	12 Paid 156	Exceptions 3					
		AMOUNT C INVOICE C	CUSTOMER 🗘	CREATED 🚯 🗘	DUE 🕲 🗘	PRESENTED 🚯 🗘	EXPECTED 🚯 🗘	STATUS ¥	
Help from Transcard		\$1,983,526.00 USD CB15-090	Likang's Bakery	Jun 15, 2022	Jun 28, 2022	Aug 14, 2022	-	Pending Presentment	Cancel
Your Account Information	~	\$1,886,663.00 USD R01002	Asheville Brazilian Jiu	Jun 18, 2022	Jul 26, 2022	-	-	F Unproccesed	Invoice
		\$1,830,317.00 USD COMP1502	Shunn Shudders	Jun 17, 2022	Jun 26, 2022	-	-	F Unproccesed	Invoice
Powered by Transcard Terms of Use Privacy Policy		View all \rightarrow				Rows per pa	age: 10 ~	Showing 1 - 10 of 97 results	< > >

Receivables Overview

In the 'Receivables Overview' page, the user will see four tabs:

- 1. Ready to Invoice: Invoices that are ready to receive payments.
- 2. In progress: Invoices that have already been sent.
- 3. Paid: Successfully paid invoices.
- 4. Exceptions: Invoices that failed to send and/or failed to send payments successfully.

Receivables Overvi 22 Receivables	ew S Refresh	1					Q Search	
Ready to invoice 22	2 In progress	3 12 Paid 156	4 Exceptions 3					
AMOUNT 🗘	INVOICE NUMBER	CUSTOMER 🗘	CREATED 🚯 🗘	DUE 🕲 🗘	PRESENTED 🚯 🗘	EXPECTED 🚯 🗘	STATUS ¥	
\$1,983,526.00 USD	CB15-090	Likang's Bakery	Jun 15, 2022	Jun 28, 2022	Aug 14, 2022	-	Pending Presentment	Cancel
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\$1,830,317.00 USD	COMP1502	Shunn Shudders	Jun 17, 2022	Jun 26, 2022	-	-	■ Unproccesed	Invoice
View all \rightarrow					Rows per p	age: 10 v Si	nowing 1 - 10 of 97 results	< > »



Ready to Invoice Tab

In the Ready to Invoice tab, a user can send an invoice to receive payment. The number next to the tab represents how many invoices the user has ready to send to for payment. Users have three options on when to send out an invoice:

1. Invoice Now

- a. Click on the blue 'Invoice' button.
- b. Select the 'Invoice Now' option.
- c. Select the 'Method of Payment' (MOP).
- d. Select the 'Receiving Account for ACH and RTP Receivables' if applicable.
- e. A pop-up window will appear to confirm invoice details. Once the details are confirmed, click the blue 'Invoice' button.
- f. Receive the 'Payment Request Submitted' pop-up and click 'Done' to return to the SMART Hub Dashboard.

SMART Hub	(Hello, Johnny Anderson						
Dashboard		A You have 5 past due customer payments.					Invoice Now	
 Bills/Payables Vendors 	12	Receivables 🔶 > Receivables						
Invoices/Receivables Customers	3	← Initiate Payment Request						
④ Settings 5 곳 Users	5	\$7,320,100.00 USD · Unprocessed to Refresh DUE DATE CUSTOMER RVOICE NUMBER Aug 13, 2022 Flattley-Kovacek LC7-C		Í	Invoice Now Initiate a payment request	nvoice Now 🗧 🛛	nvoice: \$7,320,100.00	
L_ Support: 800-890-3128		2 Method of Payment Select payment method	⇒	Receiving Account fo	Select a single future date t payment request(s)	o initiate	0	
Your Account Information	~	Receivable Summary			Collect on Due Date Process payment request(s invoice due date	on the	^	
		ITEM (5)			QUANTITY	UNIT PRICE	AMOUNT	
		Chair KS8671			6	\$332.95 USD	\$1,997.70 USD	
		Pillow FT1241			2	\$50.95 USD	\$101.90 USD	
		TV Unit OSK112			1	\$1,250.50 USD	\$1,250.50 USD	
Powered by Transcard		Table VGY716			1	\$1,725.25 USD	\$1,725.25 USD	
Terms of Use Privacy Policy		Sofa OG00GY			1	\$13,332.95 USD	\$13,332.95 USD	
		Bed Frame 812HYG87			1	\$9,125.95 USD	\$9.125.95 USD	



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2. Schedule for later

- a. Click on the blue 'Invoice' button.
- b. Select the 'Schedule payment' option.
- c. Enter the date to be scheduled.
- d. Select the 'Method of Payment' (MOP).
- e. Select the 'Receiving Account for ACH and RTP Receivables' if applicable.
- f. A pop-up window will appear to confirm the invoice details. Once the details are confirmed, click the blue 'Schedule' button.
- g. Receive the 'Payment Request Scheduled' pop up and click 'Done' to return to the SMART Hub Dashboard.

SMART Hub	Hello, Johnny Anderson					A 🖉	
Dashboard	A You have 5 past due customer payments.					Invoice Now	
Bills/Payables	Receivables 🌸 > Receivables						
Vendors Invoices/Receivables	← Initiate Payment Request						
© Customers	\$7,320,100.00 USD · Unprocessed & Refresh				Schedule Payment 🗘 In	voice: \$7,320,100.00	
😤 Users 5	DUE DATE CUSTOMER INVOICE NUMBER Aug 13, 2022 Flatley-Kovacek LC7-C			Schedule Date 📵	MM/DD/YYYY		
L Support: 800-890-3128	Method of Payment	● Schedule Timing Please note that all scheduled payments will be submitted on selected date starting from 9 AM (ET).			6		
Your Account Information ~	Receivable Summary				 Bank Account Please note that the b provided by your bank might not always account transactions. 	alance shown is as . On occasion, it sunt for pending	
	ITEM (5)			QUANTITY	UNIT PRICE	AMOUNT	
	Chair KS8671			6	\$332.95 USD	\$1,997.70 USD	
Powered by Transcard Terms of Lise Privacy Policy	Pillow FT1241 TV Unit OSK112	2				\$101.90 USD	
Pintuppolity	Table VGY716			1	\$1,725.25 USD	\$1,725.25 USD	

Transcard

3. Collect on Due Date

- a. Click on the blue 'Invoice' button.
- b. Select 'Collect on Due Date' option.
- c. Select the 'Method of payment' (MOP).
- d. Select the 'Receiving Account for ACH and RTP Receivables' if applicable.
- e. A pop-up window will appear to confirm the invoice details. Once the details are confirmed, click the blue 'Collect on Due Date' button.
- f. Receive the 'Payment Request Scheduled' pop up and click 'Done' to return to the SMART Hub Dashboard.

SMART Hub	Hello, Johnny Anderson					4 🕘
	You have 5 past due customer payments	Collect on Due Date	×			Invoice Now
	Receivables 🔶 > Receivables	\$20,100.00				
		SMART Collect Details				
Invoices/Receivables	← Initiate Payment Request	Contact Addresses kovacheck@em	ail.com			
		Payment Workflow SMART Collect				
	\$7,320,100.00 USD • Unprov	\downarrow		۵	Collect on Due Date \$	Invoice: \$7,320,100.00
		Origination Account Bank of America	a ••••1728			
	Aug 13, 2022 Flatley-Kovacek	Make default payment method		Due Date 🌒		
L Support: 800-890-3128	Method of Payment	Checking this means next time you make a pay will be pre-selected. You can change it anytime profile.	ment request it in customer	eiving Account for ACH and RfP Receivable		
	SMART Collect			elect bank account		
Your Account Information		Cancel Collect or	n Due Date			
Terms of Use Privacy Polic	Receivable Summary					

