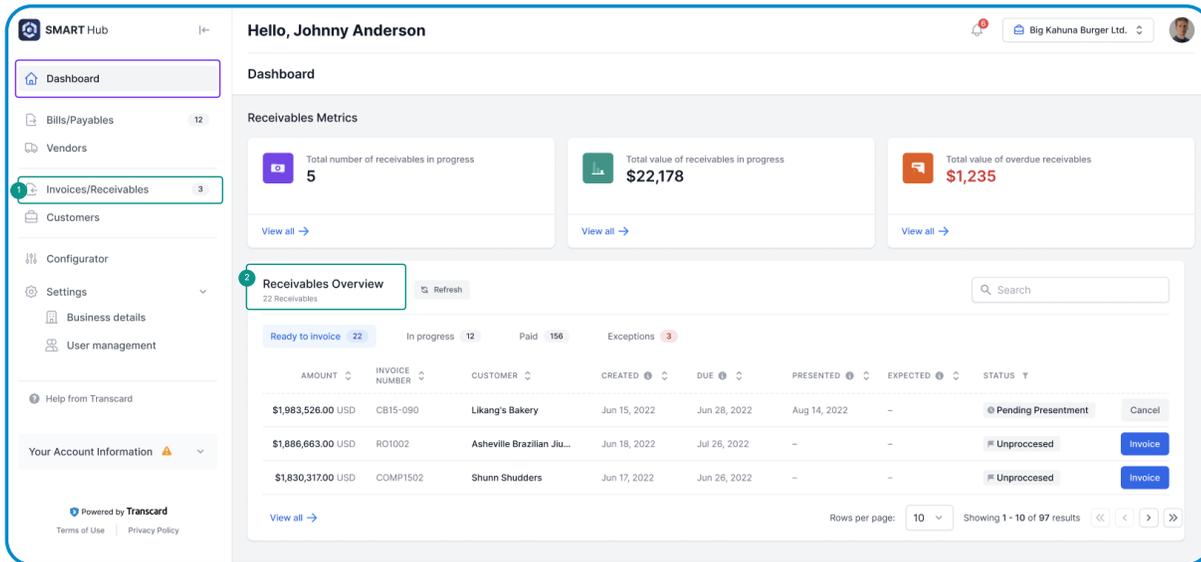


# HOW TO SEND AN INVOICE IN SMART HUB

VERSION 1

## SMART Hub Dashboard

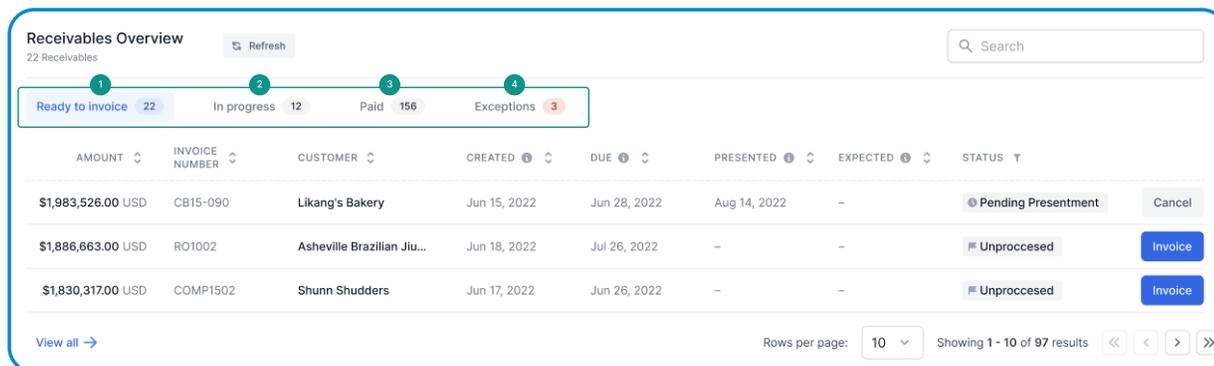
On the SMART Hub dashboard, a user can send an invoice or manage a receivable through the 'Invoices/Receivables' tab on the left-hand panel, this will take the user to the 'Receivables Overview.'



## 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.

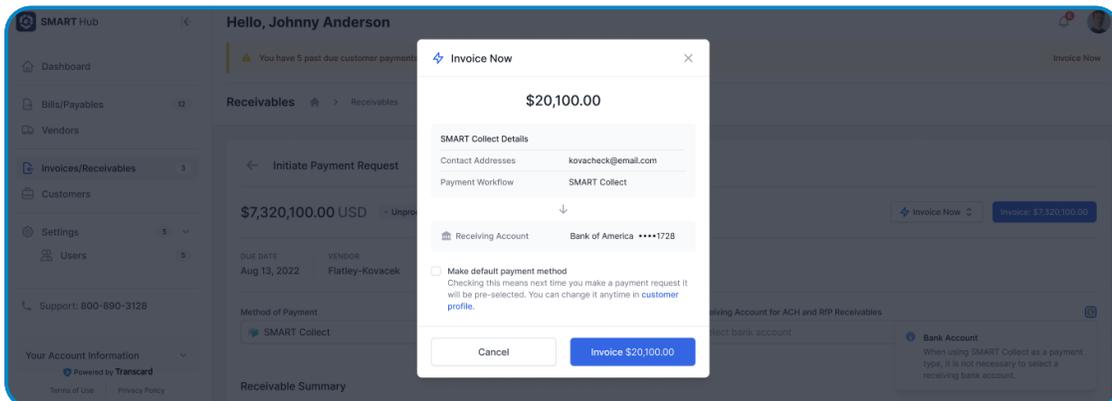
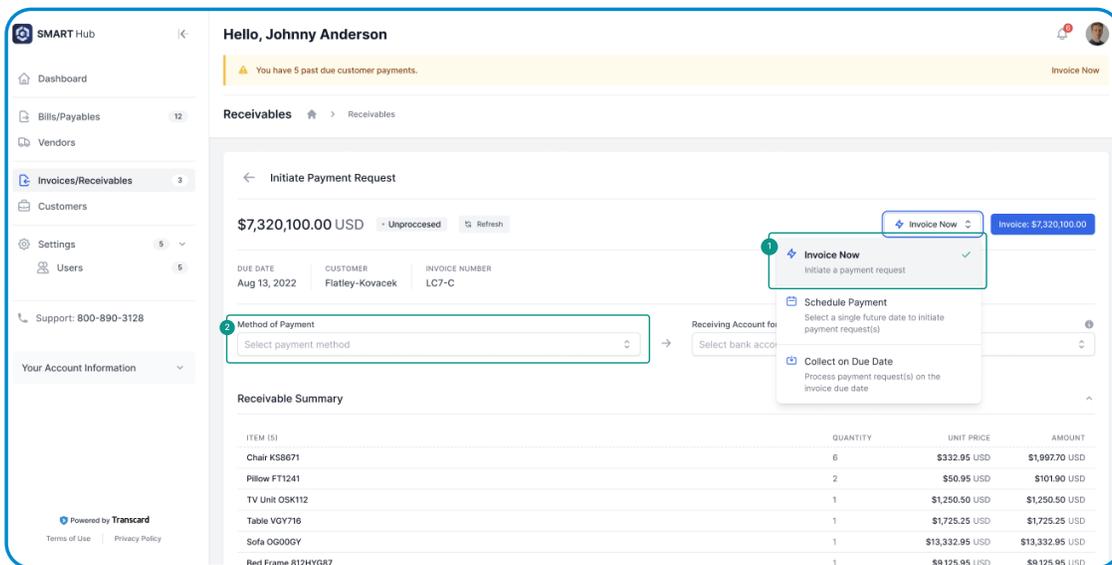


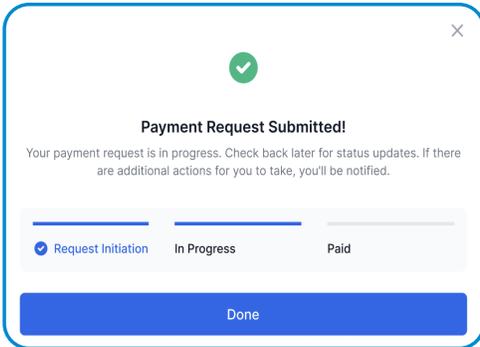
## Ready to Invoice Tab

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

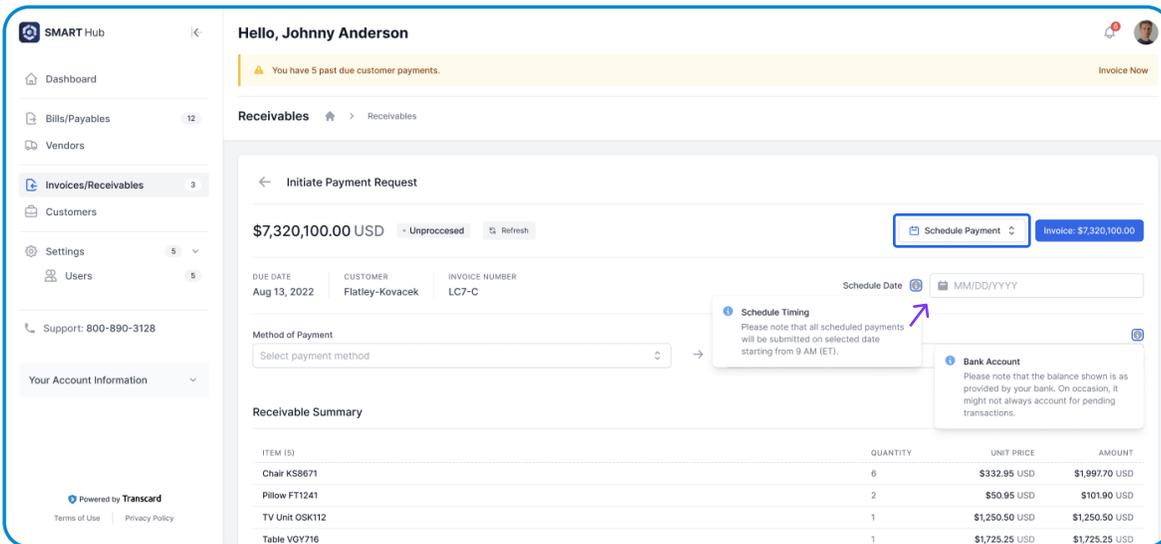
- Click on the blue 'Invoice' button.
- Select the 'Invoice Now' option.
- Select the 'Method of Payment' (MOP).
- Select the 'Receiving Account for ACH and RTP Receivables' if applicable.
- A pop-up window will appear to confirm invoice details. Once the details are confirmed, click the blue 'Invoice'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





## 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.



### 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.

