

HOW TO MAKE PAYMENTS IN SMART HUB

VERSION 1





SMART Hub Dashboard

On the SMART Hub dashboard, you can make a payment in two ways:

- 1. Click on 'Payments Overview' under 'Payment Metrics.'
- 2. Click on the 'Bills/Payables' tab on the left panel.

After clicking the 'Pay' button, you'll automatically be redirected to the 'Payable Details' tab.

SMART Hub	Hello, Johnny Anderson	ı. 🧐 🧶
Dashboard	Alert. 20 unpaid Invoices are due today.	Pay Now
Bills/Payables	Dashboard	
🕞 Vendors	Payments Metrics	
E Invoices/Receivables 3 Customers	Total number of payments in progress 4 Total value of payments in progress \$22,178	ceptions
Settings 5 Strings 5 Users 5	View all → View all → View all →	
€_ Support: 800-890-3128	22 Payments Q. Search Ready to pay 24 In progress 12 Paid 156 Exceptions 3	
Your Account Information ~	AMOUNT 🗘 INVOICE 🗘 PAYEE 🗘	DUE DATE 👙
	> \$20,100.00 USD LC7-C Flatley-Kovacek	Mar 20, 2020
Powered by Transcard	> \$8,087.00 USD TN1-F Rad Roofing	Oct 12, 2019
Terms of Use Privacy Policy	View all → Rows per page: 10 ∨ Showing 1 - 10 of 97 result	lts « < > »

Payments Overview

In the 'Payments Overview' page, you'll see all bills that are ready to pay. After clicking the 'Pay' button, you'll be redirected to the 'Payable Details' tab.

2 Payments Overview		Q Search	Filter ~
Ready to pay 24 In progress 12	Paid 156 Exceptions 3		
AMOUNT O INVOICE	PAYEE 🗘	DUE DATE 🗘	STATUS
> \$20,100.00 USD LC7-C	Flatley-Kovacek	Aug 13, 2022	Unprocessed
> \$8,520.00 USD FX8-C	Rad Roofing	Aug 17, 2022	Pending Initiation Cancel
> 33,443.00 USD KQ5-B	Lily's Flower Shop	Aug 17, 2022	F Unprocessed Pay
	Rows pe	r page: 10 \checkmark Showing 1	- 10 of 97 results 🤍 < 🔉 💌



- 1. Click on the 'Pay' button.
- 2. Select the 'Origination Account.' (You can add multiple bank accounts during the SMART Enroll application/ onboarding process.)
- 3. Select the 'Method of Payment' (MOP).
 - All Transcard methods of payment will appear in the dropdown menu. However, you can only select a method that is compatible with the chosen bank. If a method is not available, 'Not Available' will appear next to MOP. The recommended MOP will be listed first.

SMART Hub	Hello, Johnny Anderson			A 🖉
斺 Dashboard	Alert. 20 unpaid Invoices are due today.			Pay Now
Bills/Payables	Payables 🏫 > Payables > Payable details			
Vendors Invoices/Receivables 3	← Initiate a Payment			
Customers	\$20,100.00 USD • Unproccesed & Refresh			
 ⊗ Settings s ∨ ⊗ Users s 	DUE DATE VENDOR INVOICE NUMBER Aug 13, 2022 Flatley-Kovacek LC7-C			
L_ Support: 800-890-3128	2 Origination Account Select account	0] →	Method of Payment
Your Account Information ~	Secondary Bank Account American Express ••••1010	Balance \$111,921.02		ACH (1-3 days) (Recommended
	Michelle Anderson External card Mastercard ••••1911			SMART Disourse Learn more → SMART Exchange Learn more →
	ICCP prepaid credit account Credit account American Express •••••1911	Balance		Wire (Same day) Check Slowest
	Insurance Bank Account American Express •••••1911	Balance \$56,921.02		Pay with Card How this works → RTP (1 hour) Not available
	This bank account is inactive. Click here to resolve this issue.			Payment method is not available for this bank account. Please select another bank account or contact support for more information.
Powered by Transcard Terms of Use Privacy Policy				

After selecting the origination account and method of payment, you can choose to:

- 1. Pay the bill now.
- 2. Schedule the payment.
- 3. Pay the bill on the due date.

E Invoices/Receivables	3	← Initiate a Payment			
Customers		\$20,100.00 USD · Unprocessed & Refresh		🕹 Pay Now 🗘	Pay: \$20,100.00
 Settings Users 	5 ~	DUE DATE VENDOR INVOICE NUMBER Aug 13, 2022 Flatley-Kovacek LC7-C		Pay Now Make payment at the time of initiation	
L_ Support: 800-890-3128		Origination Account	Image: Strength of Payment ○ → image: SMART Dist	Schedule Payment Select single future payment date for payable(s) to be paid	\$
Your Account Information	~		Where would you Provide your pays token will be sent	Pay on Due Date Pay payable(s) on stated Due Date ee's en	purse payment



Pay Now

After selecting the method of payment and entering the required data, click the blue 'Pay' button.

SMART Hub	←	Hello, Johnny Anderson		. <mark>@</mark>
斺 Dashboard		Alert. 20 unpaid Invoices are due today.		Pay Nov
Bills/Payables	12	Payables 🕐 Payables > Payable details		
D Vendors				
Invoices/Receivables	3	← Initiate a Payment		
Customers		\$20,100.00 USD · Unprocessed Stresh		◆ Pay Now 0 Pay: \$20,100.00
 Settings Users 	5 ¥	DUE DATE VENDOR INVOICE NUMBER Aug 13, 2022 Flatley-Kovacek LC7-C		<u></u>
L Support: 800-890-3128		Origination Account 6		Method of Payment
		💼 Secondary Bank Account ++++1010 🗘) →	SMART Disburse
Your Account Information	v		-	Where would you like to send the payment link? Provide your payers email address or/and phone number where the SMART Disburse payment token will be sent to. Contact Addresses

A pop-up window will appear to confirm the payment details. Confirm the details and click the 'Pay' button.

SMART Hub	Hello, Johnny Anderson	🎸 Pay Now	×		e 🌒
	Alert. 20 unpaid Invoices are due today.	\$20	,100.00		
Bills/Payables	Payables 🍙 > Payables > Pay	â Origination Account	Bank of America ••••1728		
	← Initiate a Payment	SMART Disburse Details	\downarrow		
	\$20,100.00 USD • Unproceese	Email	kovacheck@email.com		
	DUE DATE VENDOR Aug 13, 2022 Flatley-Kovacek	Make default payment met Checking this means next t pre-selected. You can char	hod ime you make a payment it will be ige it anytime in vendor profile.		
C Support: 800-890-3128	Origination Account	Cancel	Pay \$20,100.00 ≎ ⇒	nod of Payment	

A pop-up window will appear to confirm the payment details. Confirm the details and click the blue 'Pay' button. A 'Payment Submitted!' pop-up will appear. Click 'Done' to return to the SMART Hub dashboard.



HOW TO MAKE PAYMENTS IN SMART HUB

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Schedule a Payment (for a Future Date)

If you prefer to schedule a future payment:

- 1. Select the 'Origination Account.'
- 2. Select the 'Method of Payment.'
 - Enter all required data.
- 3. Click the arrow next to the blue 'Pay' button.
- 4. Select 'Schedule Payment.'
- 5. Enter or select a future date.
- 6. Click the blue 'Schedule' button at the bottom of the page.

E Invoices/Receivables 3	← Initiate a Payment				
Customers	\$20,100.00 USD Unproccesed & Refresh			Schedule Payment	Schedule
 ⊗ Settings 5 ~ ⊗ Users 5 	DUE DATE VENDOR INVOICE NUMBER Aug 13, 2022 Flatley-Kovacek LC7-C		A Pay Now Make pay	ment at the time of initiation	
t_ Support: 800-890-3128	Origination Account m Secondary Bank Account ****1010	Image: State	Select sin payable(s	gle future payment date for) to be paid	÷
Your Account Information v	Payable Summary		Pay payal	Due Date	^
	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
	Table VGY716		1	\$1,725.25 USD	\$1,725.25 USD
	Sofa OG00GY		1	\$13,332.95 USD	\$13,332.95 USD
Powered by Transcard Terms of Use Privacy Policy				Schedule Payment	Schedule

You can manually enter the date or use the calendar date picker to select a future date. After clicking 'Pay,' a pop-up will appear to confirm that the payment has been scheduled.

← Initiate a Payment												
\$20,100.00 USD · Unprocessed S Refresh					🖹 Schi	edule P	aymen	1 0) [s	chedule		
DUE DATE VENDOR INVOICE NUMBER Aug 13, 2022 Flatley-Kovacek LC7-C			Schedule Date 🚯		//DD/Y	YYY	-	D				
Origination Account	0	Method of Payment		2	<	Auç	gust 20	022	>	>>		
Secondary Bank Account ••••1010	\Rightarrow \rightarrow	ACH		м	т	W	т	F	s	S		
				27	28	29	30	31	1	2	10	-
Payable Summary				3	4	5	6	7	8	9		\mathbf{i}
rayabe Summary				10	11	12	13	14	15	16		Payment Scheduled!
ITEM (S)			QUANTITY	17	18	19	20	21	22	23		Your payment has been scheduled for 09/24/2023.
Chair KS8671			6	24	25	26	27	28	29	30		If there are additional actions for you to take, you'll be notified.
Pillow FT1241			2	31	28	29	30	31	1	2		
Table VGY716			1									
Sofa OG00GY			1		Today	,		s	elect			Payment Initiation In Progress Paid
					🗄 Schr	edule P	aymen	• •	8	chedule		Done
								ø			11	

Transcard

On the SMART Hub dashboard the user will be able to see the scheduled payment, under the 'Status' column the date that the payment is scheduled to process will display. The user can also click the arrow on the left to expand the details and see the activity log for the bill. On the date the scheduled bill will move from the "Ready to pay' tab to the 'In progress' tab.

🗿 SMART Hub 🤟 🤟	Hello, Tom	Q. Search	J 🕫 😰
Dashboard	Payables 🔶 Payables		
☐ Payees Image: Settings ✓	Payments Overview	Q Search	Filter ~
€_ Support: 800-890-3128	Ready to pay In progress 5 Paid 1 Exceptions 1 AMOUNT AMOUNT EXTERNAL ID PAYEE PAYME	ENT DUE 🗘 ATTACHMENTS STATUS 🖲	
	S20,100.00 USD LC7-C Flatley-Kovacek Augus	st 13, 2022 B documen B 08/13/2023	Cancel
	> S8,240.00 USD JIH1782 Beier-Cummings Octob	er 20, 2022	Cancel

Activity Log

On the SMART Hub Dashboard, you can view the activity for each bill by clicking the arrow to expand the details on the left. The activity log is found under the 'Bills/Payables' tab and covers 'Ready to Pay', 'In Progress', 'Paid' bills, and those with 'Exceptions'. In the activity log, you'll find:

- Date and time the payment was initiated.
- Individual or entity that initiated the payment.
- Last four digits of the bank account used.
- Selected method of payment for the bill.
- Timestamp of the bill initiation.
- Payment status: whether it's in process, failed (with an error message), or completed.

For completed payments, you'll also see the payment method details and timestamp.

Transcard

SMART Hub	Hello, Johnny Anderson	A 🖉
Dashboard	Payables $rightarrow$ Payables	
Bills/Payables 12	Payments Overview 22 Payments Q, Search	Filter v
☐ Invoices/Receivables 3 ☐ Customers	Ready to pay 24 In progress 12 Paid 156 Exceptions 3	
	ANUME NUMBER PATE Docume Status S2,109.00 USD BS1-A Flatey-Kovacek Apr 22, 2022 FUnprocessed	Pay
L Support: 800-890-3128	NOTES Second Invoice due in August STATUS MUnprocessed ATTACHMENTS Bfie01.xml	
Your Account Information v	ACTIVITY LOG Perding Initiation Nev 29, 2021 1049 AM Payment for payable ID #2345RE03 is pending initiation on 04/22/2022 Put Disprocessed Nev 29, 2021 1049 AM Payment for payable ID #2345RE03 is pending initiation on 04/22/2022	
	\$1,829.00 USD R09-C Likang's Bakery Dec 19, 2019 E Unprocessed	Pay
	S8,83700 USD GUT-E Shunn Shudders Dec 17, 2019 F Unprocessed Image: S8,087.00 USD TNT-F He's Organic Foods Oct 12, 2019 F Unprocessed	Pay

Pay on Due Date

Pay a bill on its due date:

- 1. Select the 'Origination Account.'
- 2. Select the 'Method of Payment.'
 - Enter all required data.
- 3. Click the arrow next to the blue 'Pay' button.
- 4. Select 'Pay on Due Date.'
- 5. Click the blue 'Pay' button.

E Invoices/Receivables 3	← Initiate a Payment				
🖨 Customers	\$20,100.00 USD · Unproccesed S Refresh			Pay on Due Date	Schedule
 ⊚ Settings s ✓ ∞ Users s 	DUE DATE VENDOR INVOICE NUMBER Aug 13, 2022 Flatley-Kovacek LC7-C		Schedu	Pay Now Make payment at the time of initiation	
t_ Support: 800-890-3128	Origination Account Constant Secondary Bank Account •••••1010	Image: Wethod of Payment ○ → ACH		Sclect single future payment date for payable(s) to be paid	\$
Your Account Information v	Payable Summary		\rightarrow	Pay on Due Date Pay payable(s) on stated Due Date	
	ITEM (5)		G	UANTITY UNIT PRICE	AMOUNT
	Chair KS8671		6	\$332.95 USD	\$1,997.70 USD
	Pillow FT1241		2	\$50.95 USD	\$101.90 USD
	Table VGY716		1	\$1,725.25 USD	\$1,725.25 USD
	Sofa OG00GY		1	\$13,332.95 USD	\$13,332.95 USD
Powered by Transcard Terms of Use Privacy Policy				🗎 Schedule Payment	Schedule



Pay Multiple Bills

To pay multiple bills at once:

- 1. Click on the 'Bills/Payables' tab on the left panel.
- 2. In the 'Ready to Pay' tab, use the checkboxes to select the bills you wish to pay.
- 3. To select all payable bills, click the checkbox under the 'Ready to Pay' column. When selected, the box will display a checkmark and turn blue.

SMART Hub	←	Hello,	Johnny Anderson			<i>4</i> ⁰ (
🟠 Dashboard		Payable	😢 🏫 > Payables > Payable De	stails		
 Bills/Payables Vendors 	12	÷	Initiate a Payment			
Invoices/Receivables	3	\$20;	100.00 USD · Unproccesed	Si Refresh	💠 Pay Now 🗘	Pay: \$20,100.00
Customers	5 ~	Originat Selec	tion Account account	•	Pay Now Make payment at the time of initiation Schedule Payment	
 Users Support: 800-890-3128 	5	Vendo 4 vendo	ors to Pay		Select single future payment date for payable(s) to be paid	Total amount \$20,100.00 USD
our Account Information	~	>	He's Organic Foods 2 payables	Payment method ACH - Bank of America •••••1728 💉	Pay payable(s) on stated Due Date	Amount \$8,006.00 USD
		~	Tres Comas Tequila 8 payables	Paymant method SMART Disburse - comas@tequila.me 🖉		Amount \$6,261.00 USD
			9c9f28b8-27	DUE: July 27, 2023		\$2459.00 USD
			✓ 3d28b6e9-ec	DUE: Jan 11, 2023		\$500.00 USD
			3aab1997-f8	DUE: Feb 11, 2023		\$575.00 USD
			✓ c17687b9-5e	DUE: Aug 06, 2023		\$988.00 USD
		>	Lily's Flower Shop S payables	Payment method Select payment method		Amount \$8,006.00 USD
		>	Kunzify 2 payables	Paymant method ACH - Bank of America ++++1018 💉		Amount \$8,937.00 USD
Powered by Transcard Terms of Use Privacy Poli	lcy			L	🔶 Pay Now 🗘	Pay: \$20,100.00

After selecting the desired bills, click the blue 'Pay' button to proceed to the 'Payable Details' page:

- 1. Choose the 'Origination Account'.
- 2. For each bill, the available payment methods compatible with the selected bank will be displayed.
- 3. Select the preferred method of payment for each bill.
- 4. Fill in the required information.
- 5. Decide on a payment option: 'Pay Now', 'Schedule Payment', or 'Pay on Due Date' (if the due date hasn't passed).

After making your selection, click the 'Pay' button. The previously mentioned steps will then apply. If any selected bill can be paid on its due date, that option will be available. Bills with past due dates will be processed immediately, while those with future due dates will be paid on the specified date.



Re-run Failed Payment

If a payment doesn't process in SMART Hub, or if a SMART Disburse payment isn't completed by the recipient, follow these steps to re-run the payment:

- 1. Navigate to the 'Exceptions' tab.
- 2. Find the bill you wish to re-run.
- 3. Click the 'Re-run Payment' button.
- 4. You'll be directed to the 'Initiate a Payment' screen.
- 5. Choose the 'Origination Account' (you can change from the original selection if needed).
- 6. Select the 'Method of Payment' and provide the necessary details.
- 7. Click the blue 'Pay' button.

SMART Hub	←	Hello, Johnny Anderson							
Dashboard		Alert. 20 unpaid Involces are due today.				Pay Now			
Bills/Payables	12	Payables 🕐 > Payables							
D Vendors									
Invoices/Receivables	3	Payments Overview 22 Payments Refush		Q Search		Filter v			
Customers		Ready to pay 24 In progress 12 Paid 156 Exceptions 3							
Settings	5 ~	AMOUNT O INVOICE O PAYEE O	DUE DATE 🗘	ATTACHMENTS	STATUS				
🖉 Users	5	\$1,892.00 USD LC7-C Hubert Blaine Wolfeschlegelsteinhausenbergerdorff Sr.	Mar 20, 2020	B Job_offer	Failed	G Re-run			
L Support: 800-890-3128		✓ \$8,520.00 USD FX8-C Rad Roofing	Mar 17, 2020	B Work_con	9 Failed	G Re-run			
		NOTES Ligula vehicula consequat morbi a ipsum integer a nibh in quis justo maecenas rhoncus aliquam lacus morbi							
Your Account Information	×	STATUS O Failed							

Initiate a Payment Ealier			
\$20,100.00 USD & Refresh			4 Pay Now 💲 Pay: \$20,100.00
DUE DATE VENDOR INVOICE NUMBER Aug 13, 2022 Flatley-Kovacek LC7-C			
Origination Account Image: Construction of the secondary Bank A	→	Method of Payment ACH	\$
		Bank of America •••••1728	\$
		ACH Account Details	
		Routing Number •••	•8282
		Account Number •••	•1102
		Address I 347 Hay Wis 548 Unit	6 Orphan Road ward consin 143 ted States
		In case Routing, Account and Address (as register longer accurate please update details in your ERP, reflect this change.	red under the bank account) records are no . Once completed, please "Refresh" to



Methods of Payment in SMART Hub

Several payment methods are available, depending on your bank:

- 1. ACH
- 2. SMART Disburse
- 3. Wire
- 4. RTP
- 5. Check
- 6. SMART Exchange
- 7. Virtual Card

If the vendor possesses several bank accounts, they can choose a specific account for ACH, RTP, or Wire payment methods.

If SMART Disburse is chosen, the recipient will be able to choose the method in which they receive the disbursed funds.