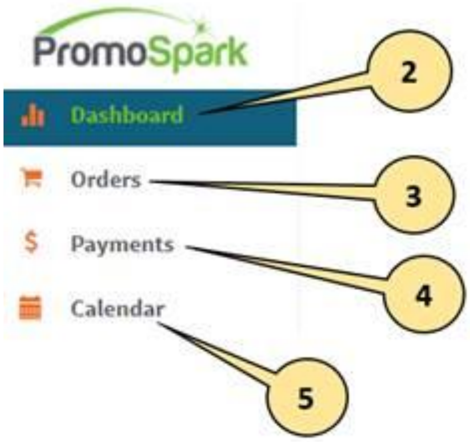
Customer Portal – Navigating Customer Account

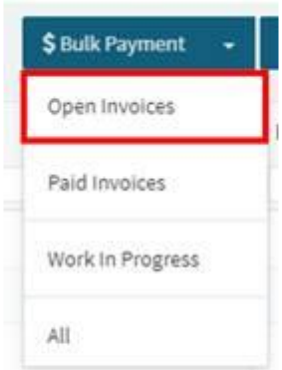
1. Side Menu Bar



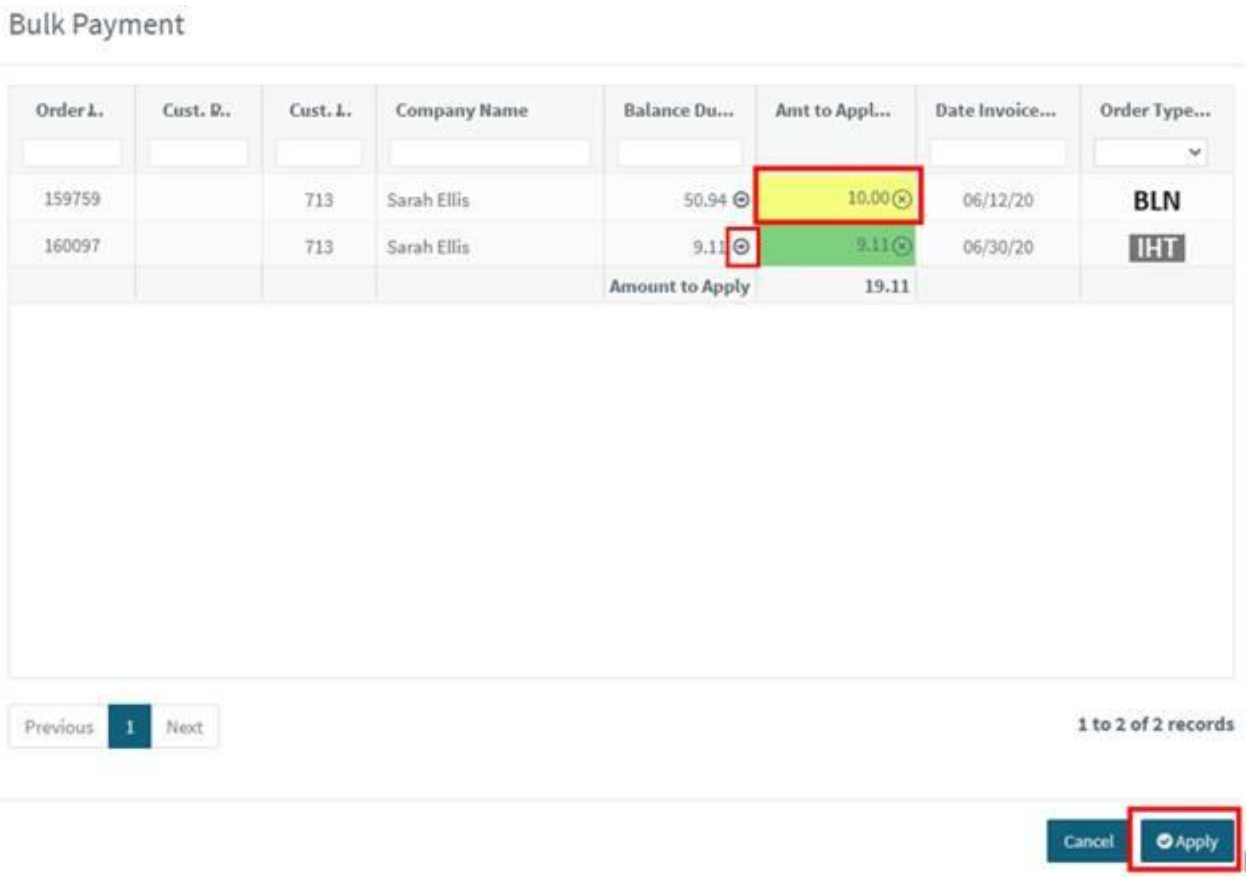
2. Upon log in, the customer is taken to a dashboard for their account
   a. Snapshot view of number of orders on account – can click on each box to see orders in bucket
   b. Tabs – second way for navigation
   c. Clicking on an order will open the order view in a new window

3. Orders – customers can see all orders placed on their account

   a. Customers can click on column headers to sort
   b. Bulk Payment – Provides an option to make a bulk payment to the account
      i. Click on the arrow and choose Open Invoices



ii. Click on the arrows next to the open balance to move to bulk payment. The customer can also type directly into the Amt to Apply box to make a partial payment
iii. Click Apply
iv. Enter credit card information


Bulk Payment

Order #..	Cust. R..	Cust. #..	Company Name	Balance Du...	Amt to Appl...	Date Invoice...	Order Type...
159759		713	Sarah Ellis	50.94	10.00	06/12/20	BLN
160097		713	Sarah Ellis	9.11	9.11	06/30/20	IHT
				Amount to Apply	19.11		

c. Advanced Filter – gives the customer options to limit orders in list
d. View All Open – Clears filters
e. Download – allows customer to download orders list in excel or CSV file

4. Payments
   a. List all payments on account
   b. Advanced Filter allows customer to choose filter options (Order #, Company, Date of Payment, Payment Amount)
   c. Payments – Payments that have synced with our system
   d. Web Payments – payments that have not yet synced with our system