



This is a guide to explain how payments work on the customer portal. If you need additional help, please follow the link below to **Freshbooks** help page for instructions, or you may contact customer service.

The cloud based, online accounting software I use is set up to protect the card holder. You have a secure customer portal to view, save, or print invoices and make payments. Your portal can be accessed at any time, using any device with internet access. Simply follow the last Email link you were sent by THEPOOLGUY.JASON@GMAIL.COM.

Credit cards on file can be updated and stored for recurring invoices only. You may also pay one off invoices that are non recurring there on a secure payment screen. Using this secure method to handle transactions is not only convenient, but it also reduces the risk of your card information being compromised.

- The credit card on file is used specifically for recurring payments (weekly service). Credit cards on file cannot be used to make payments on invoices that are not recurring (by you or I). Separate invoices, other than the monthly invoices from a recurring profile, must be paid individually. This is due to the type of compliance insurance the credit card processing company has. Once a credit card is stored on a recurring profile, the number is encrypted, even to me. Only the last 4 digits are visible.
- When making a payment against an outstanding recurring invoice, you will see a check box asking if you would like to use the new card for future payments. This box is automatically checked. The card you use to pay a recurring invoice will be saved and used for the recurring invoices moving forward.

The link below provides more instructions on how to manage payments on your customer portal.

<http://www.freshbooks.com/support/i-m-a-client-how-do-i-pay-my-invoices-automatically>

If you have any additional questions, or need help through the process, please contact Freshbooks customer service at - 1-866-303-6061. Tell them you are my customer and the Email on the FreshBooks account is:

THEPOOLGUY.JASON@GMAIL.COM

**JASOn**thepoolguy.com

