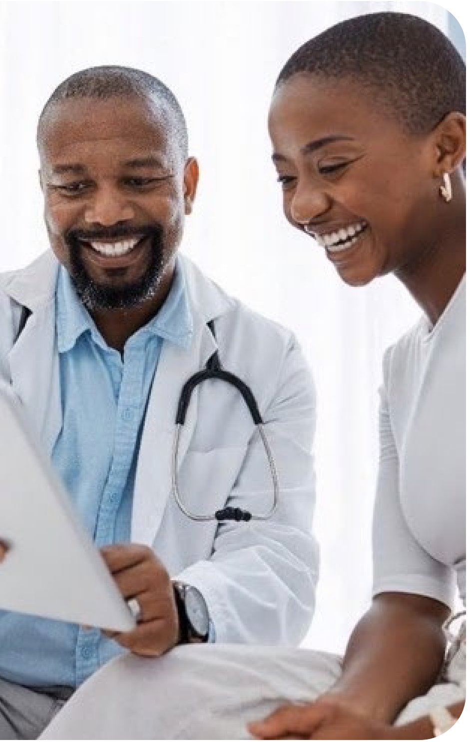
Electronic Invoice Payment & Presentment Portal (EIPP) Customer Journey User Interface (UI) Guide

Training Curriculum



1. Learning Steps
2. Overview of EIPP System
3. Invoice Presentment Workflow
4. ACH Payment Workflow
5. Credit Card Payment Workflow
6. Customer Self-Service Workflow

Learning Objectives

1. Introductions & Agenda
2. **Overview of EIPP System**
3. Invoice Presentment Workflow
4. ACH Payment Workflow
5. Credit Card Payment Workflow
6. Customer Self-Service Workflow

In this section, you'll learn about the following:

Access the HighRadius EIPP System

- Execute the steps to log on to the EIPP Portal.

Navigating Through the Key Screens

- Navigate through the EIPP Portal.

Learning Steps

Tabs Overview

Workboard → Open Bills → Closed Bills → Payment History → Dispute → Administration

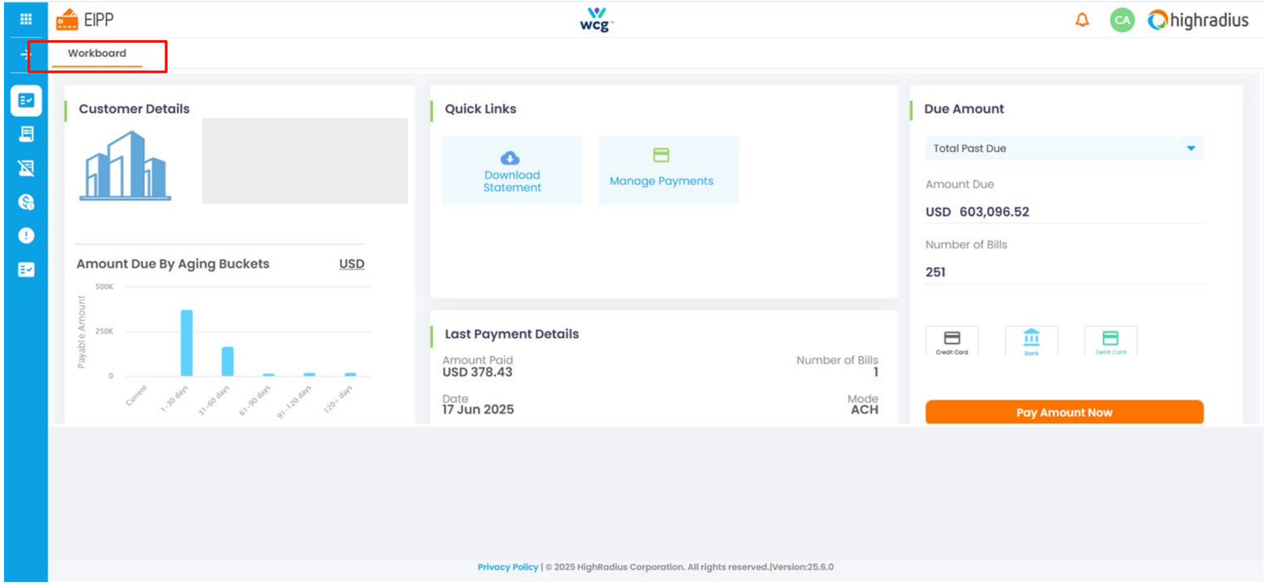
Actions

Essential Buttons → Advanced Search

Tabs Overview

Tabs Overview

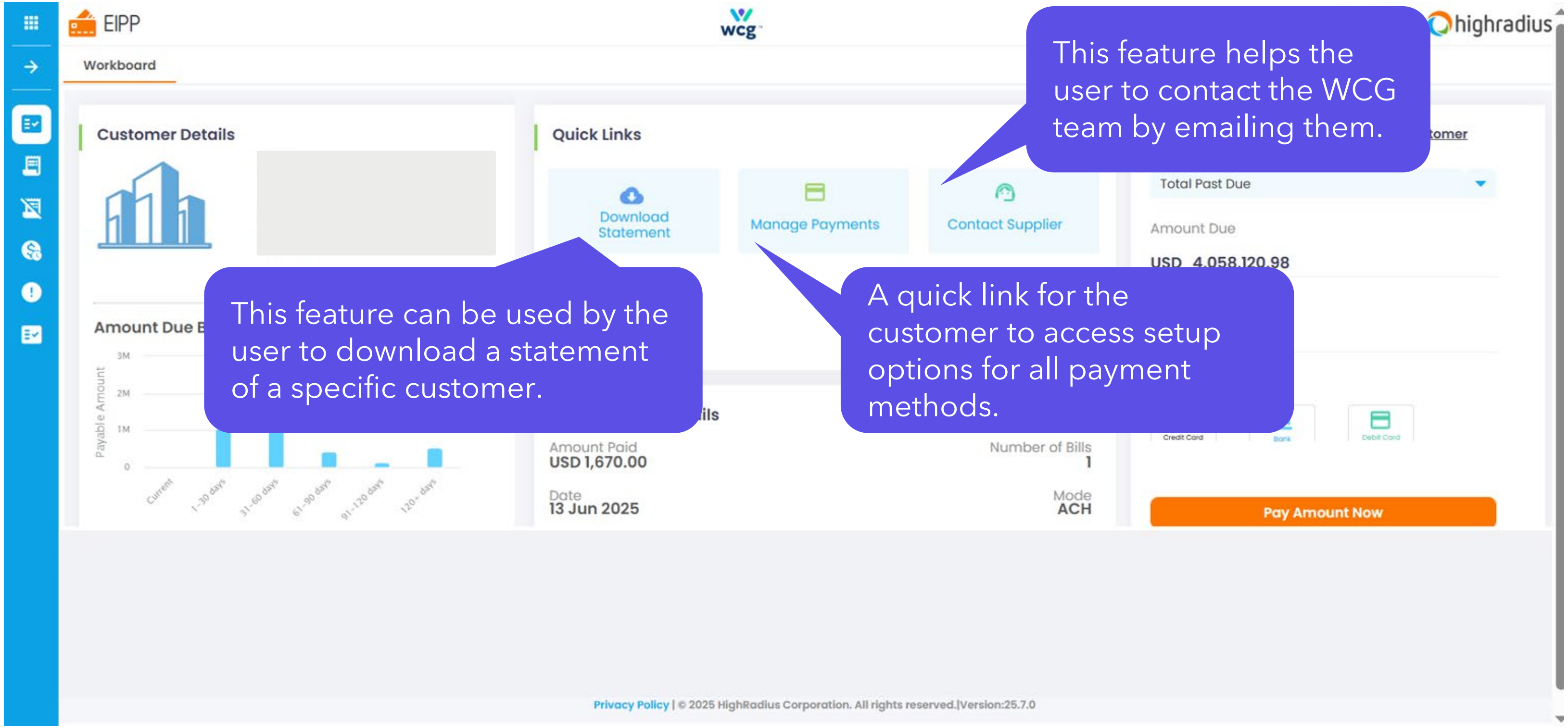
Workboard



- The **Workboard** tab gives an overview of user details, last transaction details, and even provides quick links for certain features.
- This is the landing page by default, users can change the default landing page through the Settings tab.

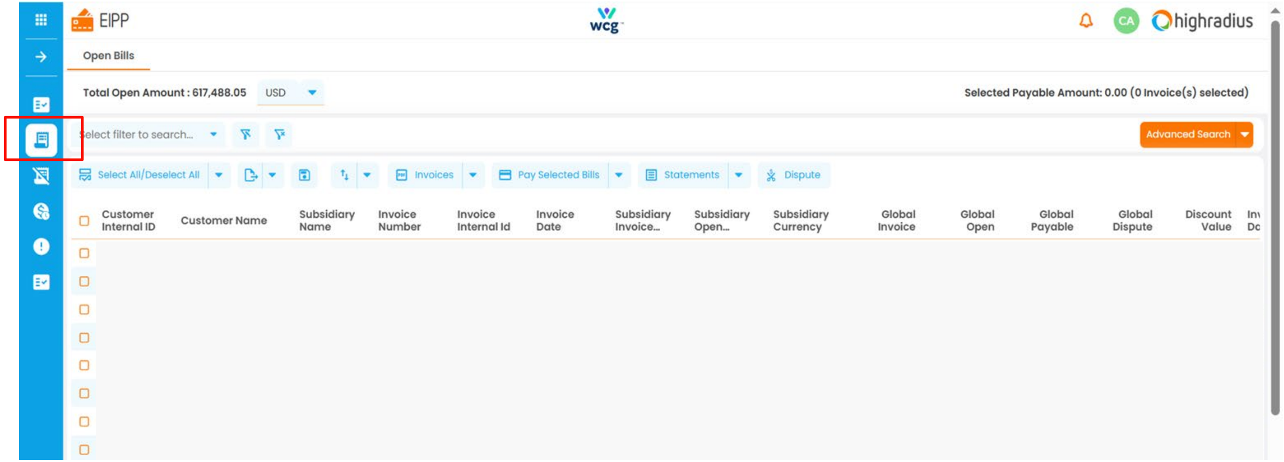
Tabs Overview

Workboard



Tabs Overview

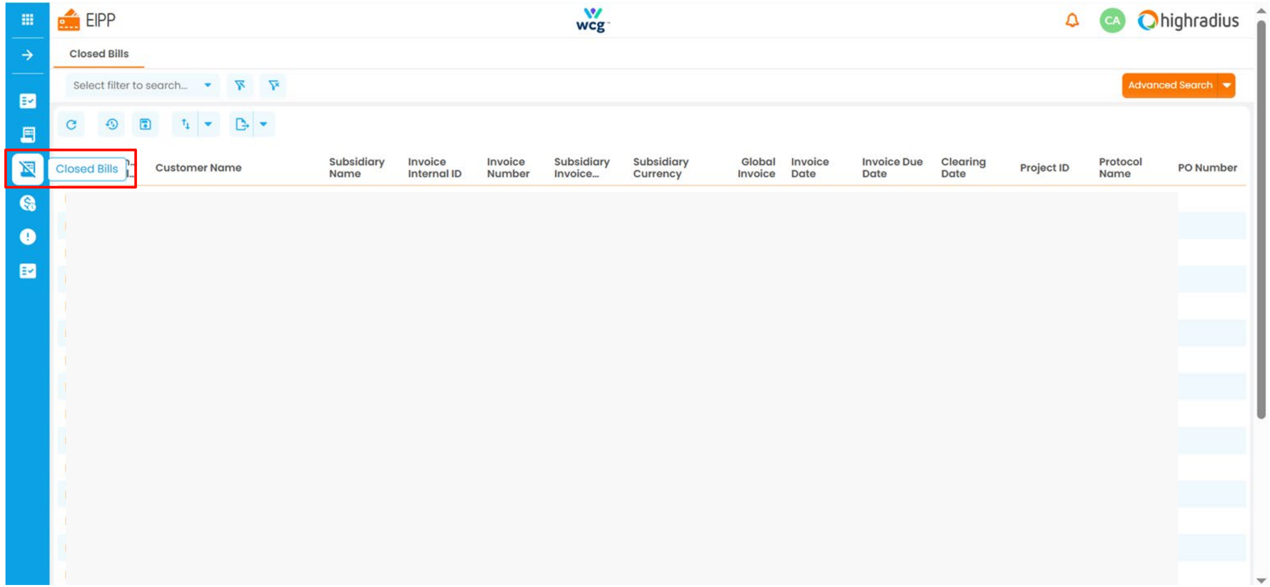
Open Bills



Click the **Open Bills** tab on the top grid header to **view all Open Bills** that are loaded into the system.

Tabs Overview

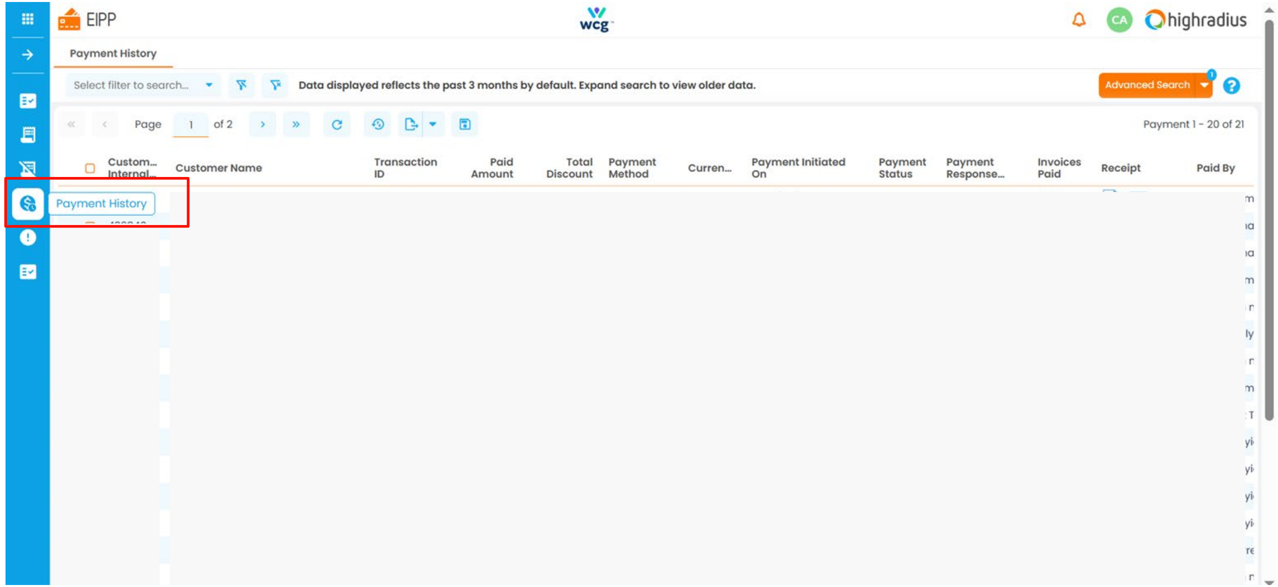
Closed Bills



Click the **Closed Bills** sub-tab under the **EIPP** tab to view all the closed invoices.

Tabs Overview

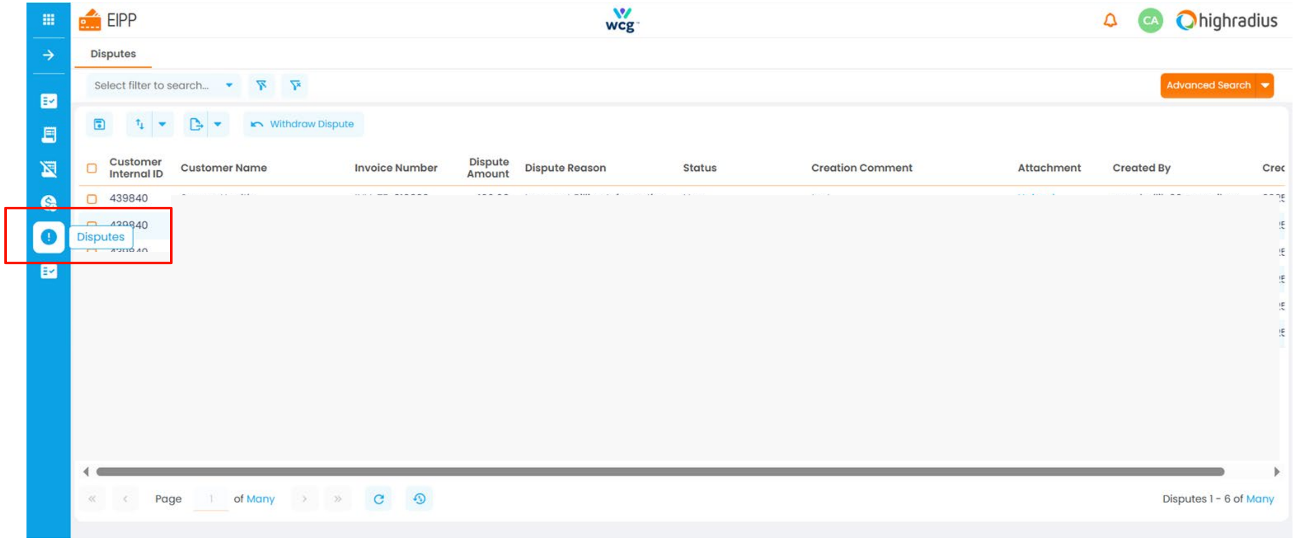
Payment History



Navigate to the **Payment History** tab to view the transaction details for all the payments made in the EIPP portal.

Tabs Overview

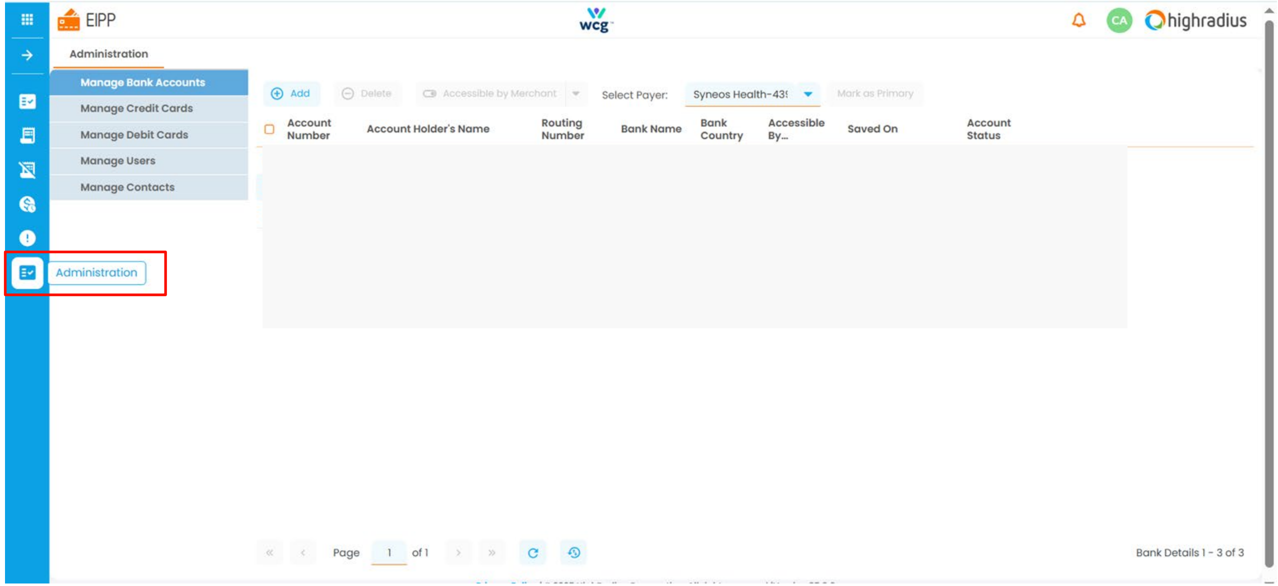
Disputes



Navigate to the **Disputes** tab to view the details of the disputes raised in the EIPP portal.

Tabs Overview

Administration



Navigate to the **Administration** sub-tab under the EIPP tab to manage your accounts as well as contacts/users.

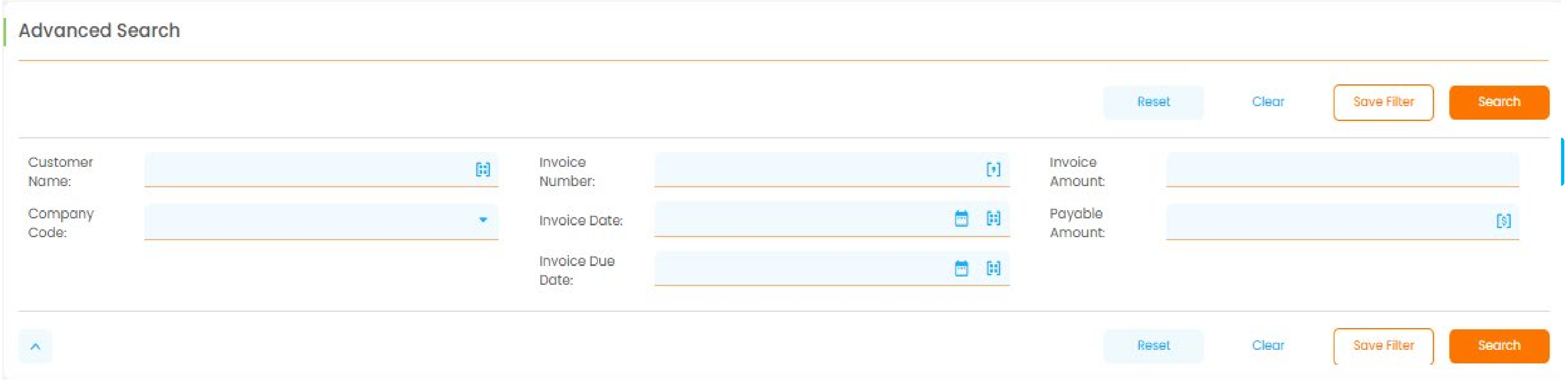
Actions

Essential Buttons

Button	Available Screens	Why is it used?
Invite Contact	Manage Contacts	Send an email invitation for registration.
Invoices	Open Bills	Email/view the selected invoice(s).
Pay Selected Bills	Open Bills	Make a payment against the selected invoice(s).
	Open Bills	Reload the screen.

Advanced Search

Specific Search Fields



Users can filter the **Open Bills** line items using **Customer Number**, **Customer Name**, **Invoice Number**, etc.

Learning Objectives

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1. Introductions & Agenda
2. Overview of EIPP System
3. **Invoice Presentment Workflow**
4. ACH Payment Workflow
5. Credit Card Payment Workflow
6. Customer Self-Service Workflow

In this section, you'll learn about the following:

Introductions

- Explain the complete user journey for EIPP Invoice Presentment workflow.

Action Required Prior to Viewing/ Downloading Invoices or Statement

- Access the Invoice Bills tab.
- View the AR invoices.
- Select the AR invoices.

Do's and Don'ts

- Describe the best practices to follow and not-to-follow during presentment workflow.

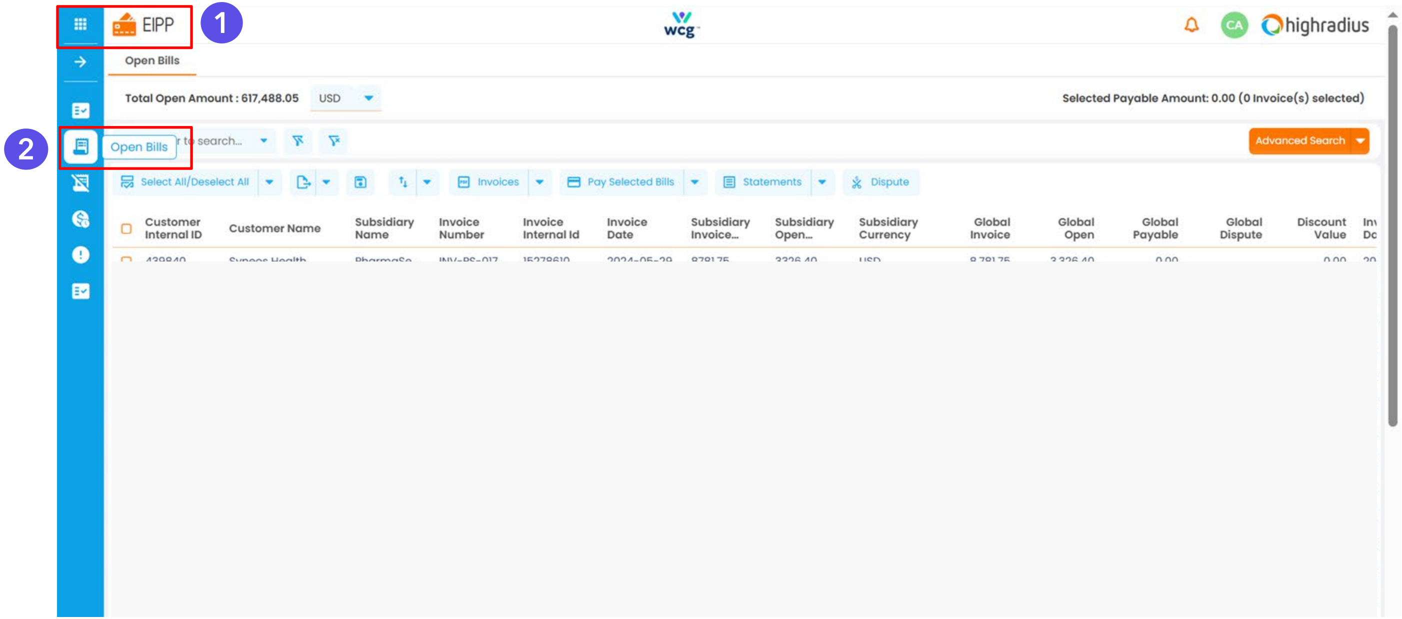
Learning Steps

Invoice Presentment	Open Bills →	View/Email Invoices
Statement Presentment	Open Bills →	View/ Statement Invoices

Statement Presentment

Statement Presentment

Open Bills

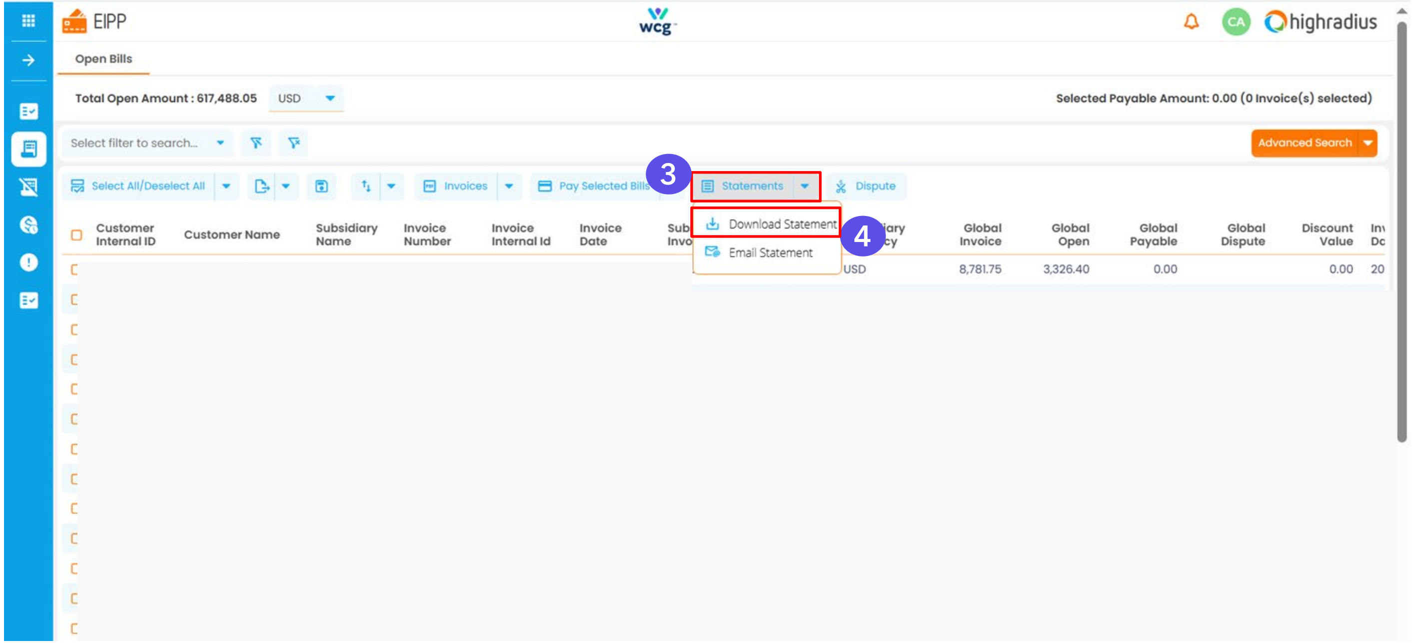


1 Navigate to the **EIPP** tab.

2 Navigate to the **Open Bills** sub-tab under the EIPP tab.

Statement Presentment - View Statement(s)

View/Email Invoices



3 Click the **Statement** dropdown. 4 Select the **View Statement** option to view statement.

Statement Presentment - View Statement(s)

View/Email Invoices

STATEMENT

Statement Date	06-23-2025
Account #	438836
Collection Analyst	
Phone	(609) 613-4393
Email	wcgcollections@wcgclinical.com

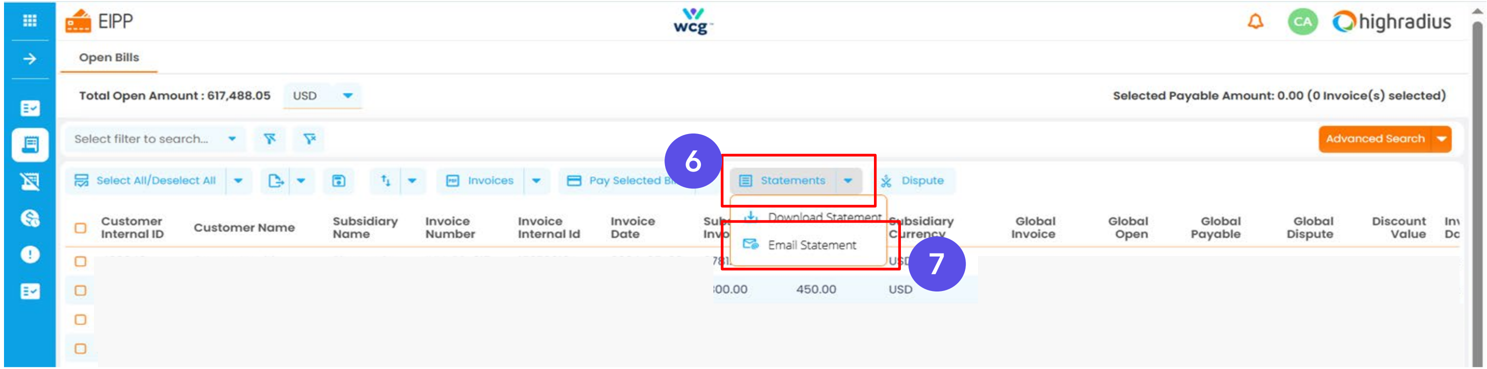
SOLD TO	Sanofi-Aventis (Master) 62971 ARRAS CEDEX 9 USA

Document Number	Invoice Date	Net Due Date	Net Arrear	Open Amount	Protocol	Sponsor	Project

5 The invoice will open in an excel format. A sample of invoice is shown.

Statement Presentment - Email Statement(s)

Open Bills

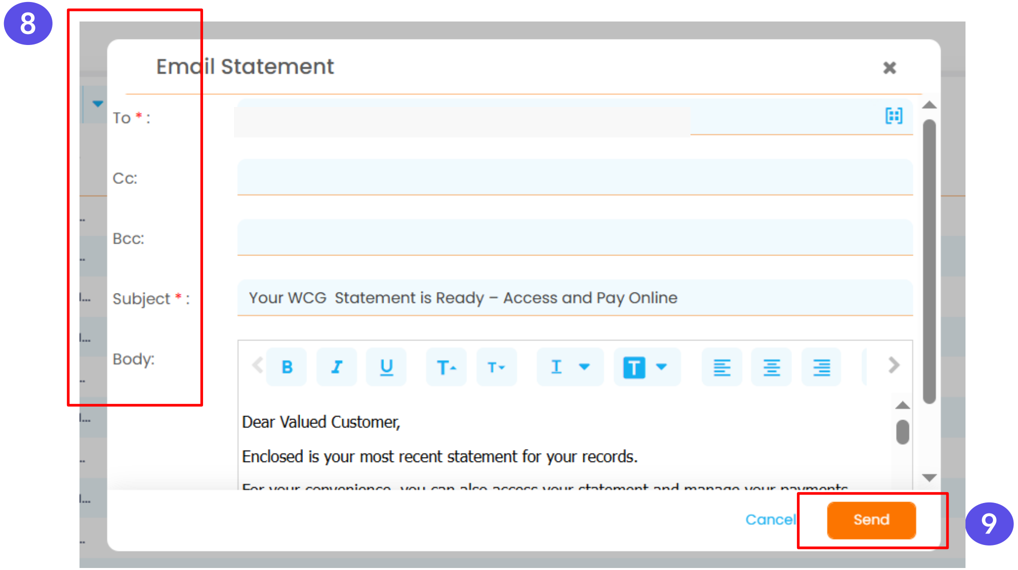


6 Click the **Statements** dropdown after selecting an invoice.

7 Select the **Email Statement** option to open the email box.

Statement Presentment - Email Statement(s)

View/Email Invoices

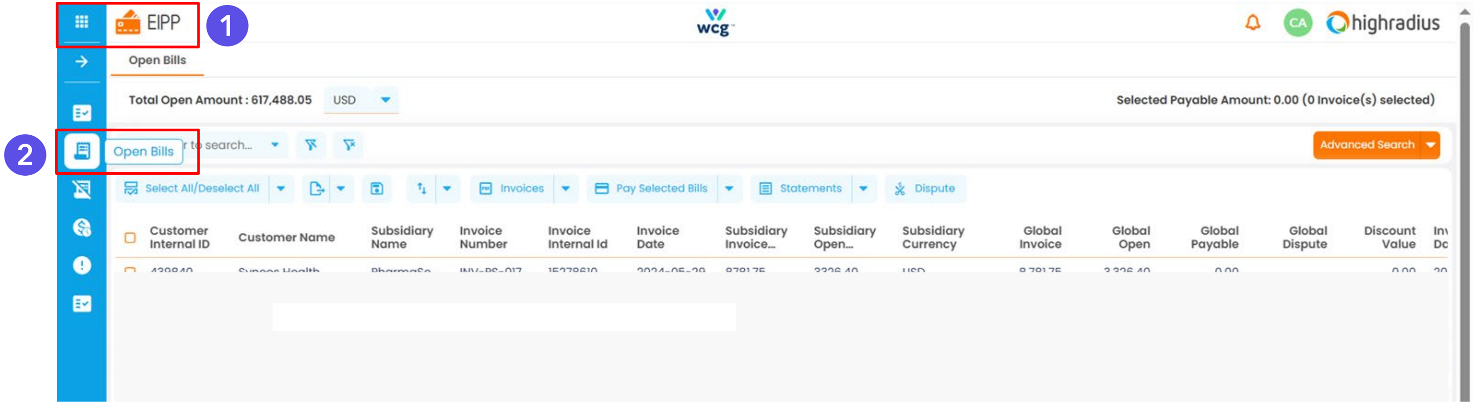


1. Validate the fields including **To, Cc, Bcc, Subject**, and **Body**.
2. Click the **Send** button to send the email. The sent email can be tracked in the Correspondence History tab.

Invoice Presentment

Invoice Presentment

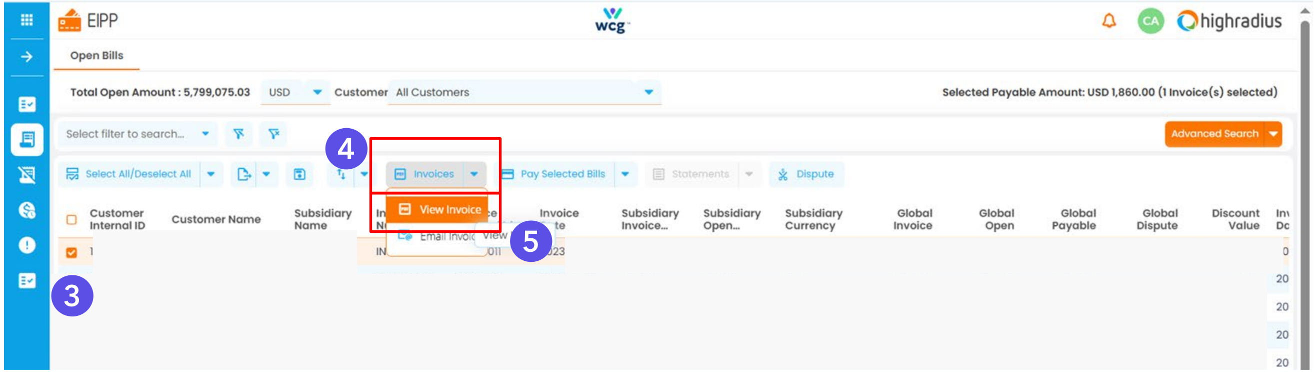
Open Bills



1. Navigate to the **EIPP** tab.
2. Navigate to the **Open Bills** sub-tab under the EIPP tab.

Invoice Presentment

View/Email Invoices



3. Select any invoice by clicking on the **record**.
4. Click the **Invoice** dropdown.
5. Select the **View Invoice** option to view the invoice.

Invoice Presentment - View Invoice(s)

View/Email Invoices

Invoice
#INV-XXXXXX
Invoice Date: 0/00/2025

5000 Centregreen Way
Suite 200
Cary, NC 27513
Phone: (626)-355-1303
Email:
Tax ID: 30-0717648

Bill To

Amount Due
$0.00
Due Date: 0/00/2025

PO#	Project #	Memo	Terms
00000000	Example Project		Net 30

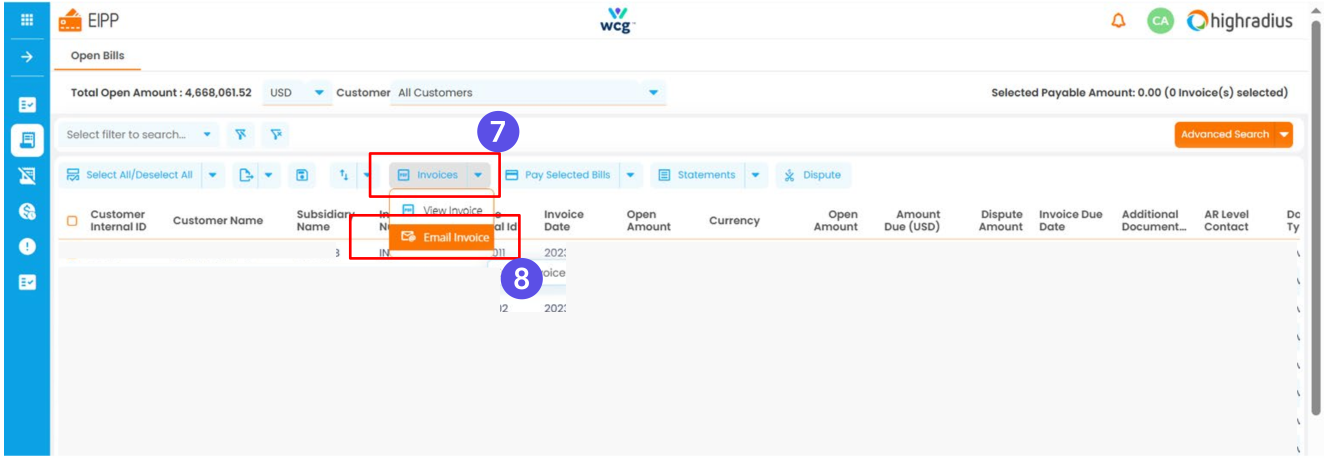
Description	Quantity	Rate	Discount	Amount
Example	1.00	0.00	0.00	0.00

Subtotal	0.00
Tax Total	$0.00
Total	$0.00

6 The invoice will open in a PDF format. A sample of invoice is shown.

Invoice Presentment - Email Invoice(s)

Open Bills

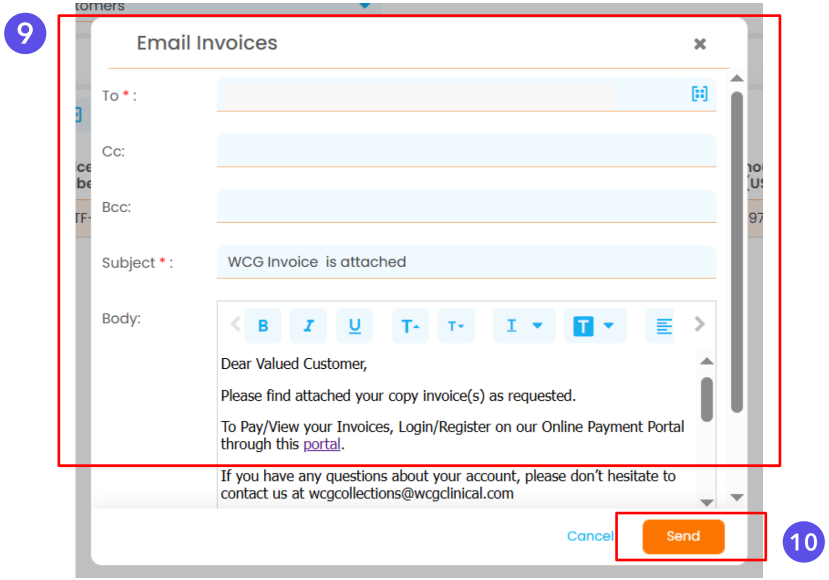


7 Click the **Invoice** dropdown after selecting an invoice.

8 Select the **Email Invoice** option to open the email box.

Invoice Presentment - Email Invoice(s)

View/Email Invoices



9. Validate the fields including **To**, **Cc**, **Bcc**, **Subject** and **Body**.
10. Click the **Send** button to send the email. The sent correspondence can be tracked in the Correspondence History tab.

Learning Objectives

1. Introductions & Agenda
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6. Customer Self-Service Workflow

In this section, you'll learn about the following:

Introductions

- Explain the complete user journey for ACH payment workflow.

Action Required Prior to ACH Payment

- Access the Open Bills tab.
- View the AR Invoices.
- Select the AR Invoices.

Do's and Don'ts

- Describe the best practices to follow and not-to-follow during making ACH Payment.

Learning Steps

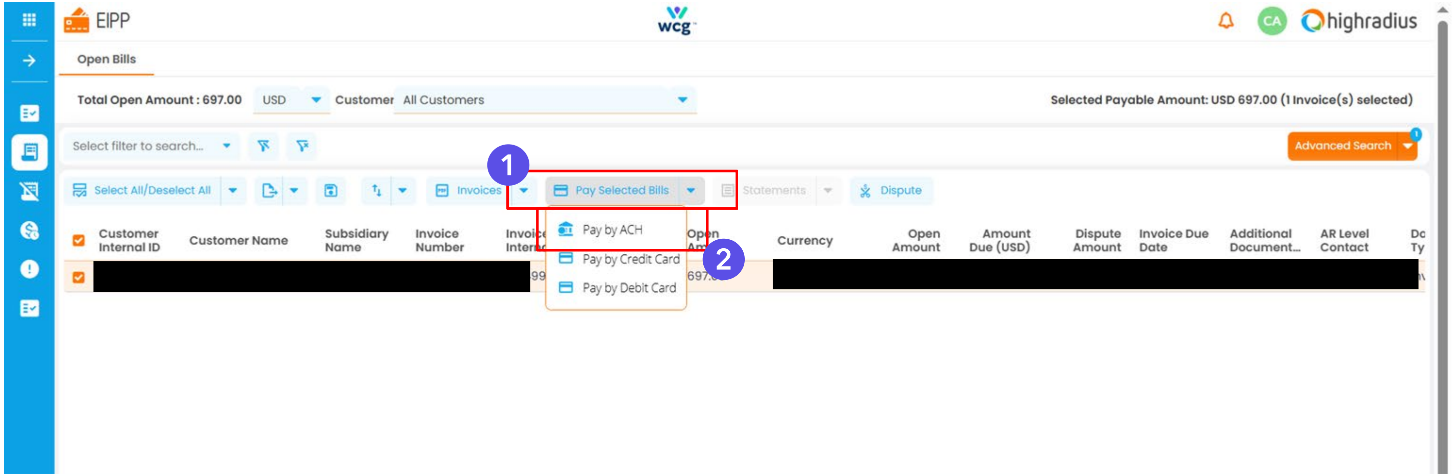
Making ACH Payment

Select ACH Payment Options → Review Payable Amount → Add or Select Bank Details to Pay

Making ACH Payment

Making ACH Payment

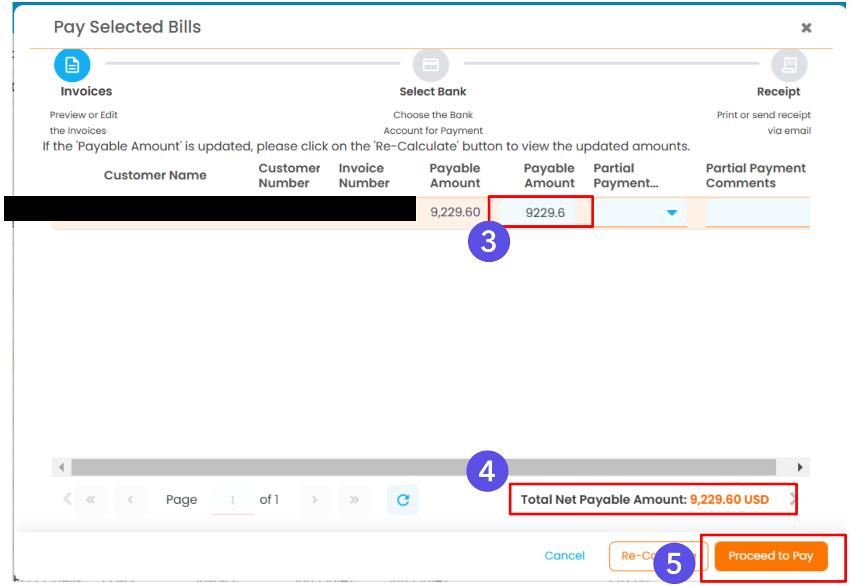
Select ACH Payment Option



1. Select the invoice(s) to be paid and click the **Pay Selected Bills** dropdown.
2. Select **ACH** as the payment method for the selected AR.

Make ACH Payment - Change Payable Amount

Review Payable Amount



3 **Review** the amount to be paid.

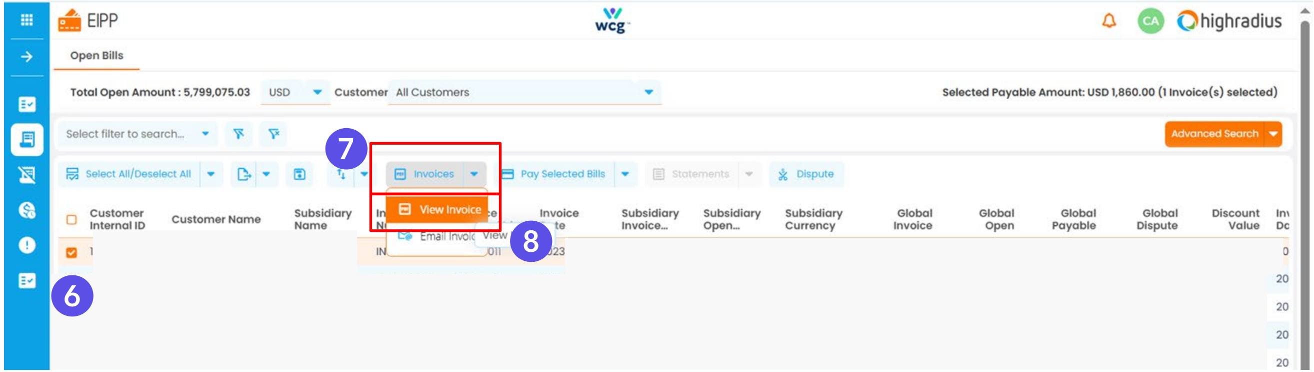
4 Check the **Total Net Payable** Amount.

5 Click on **Proceed to Pay**.

Note: In case of a partial payment, it is mandatory to provide partial payment reasons and comments

Make ACH Payment

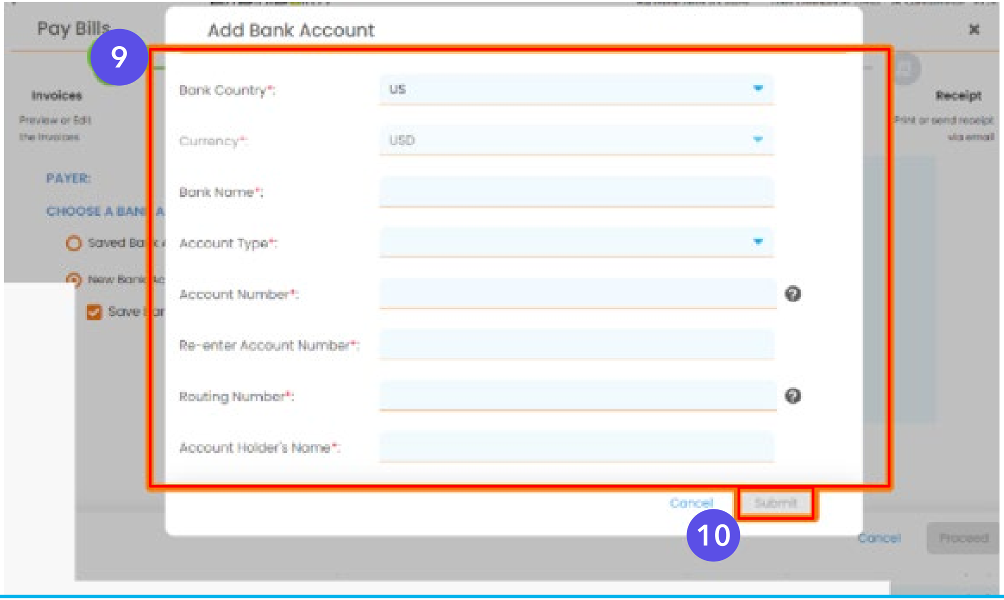
Add/Select Bank Details to Pay



6. Select any invoice by clicking on the **record**.
7. Click the **Invoice** dropdown.
8. Select the **View Invoice** option to view the invoice.

Make ACH Payment - Adding Bank Details

Add/Select Bank Details to Pay

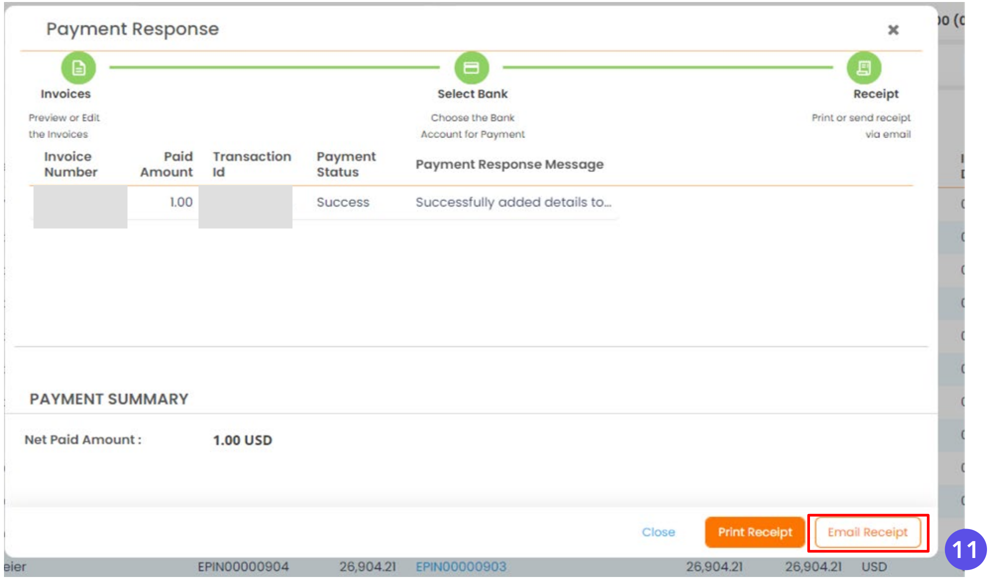


9 Add the bank account details by filling the mandatory fields marked with a red asterisk and other non-mandatory fields if necessary.

10 Click the **Submit** button to proceed with the payment process.

Make ACH Payment - Adding Bank Details

Add/Select Bank Details to Pay



After the payment is successful, a confirmation page will show up.

11 Click the **Print Receipt** or **Email Receipt** buttons to print or email the receipt for the payment.

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Introductions

- Explain the complete user journey for EIPP Invoice Presentment workflow.

Action Required Prior to Viewing/Downloading Invoices or Statement

- Access the Open Bills tab.
- View the AR invoices.
- Select the AR invoices.

Do's and Don'ts

- Describe the best practices to follow and not-to-follow during presentment workflow.

Learning Steps

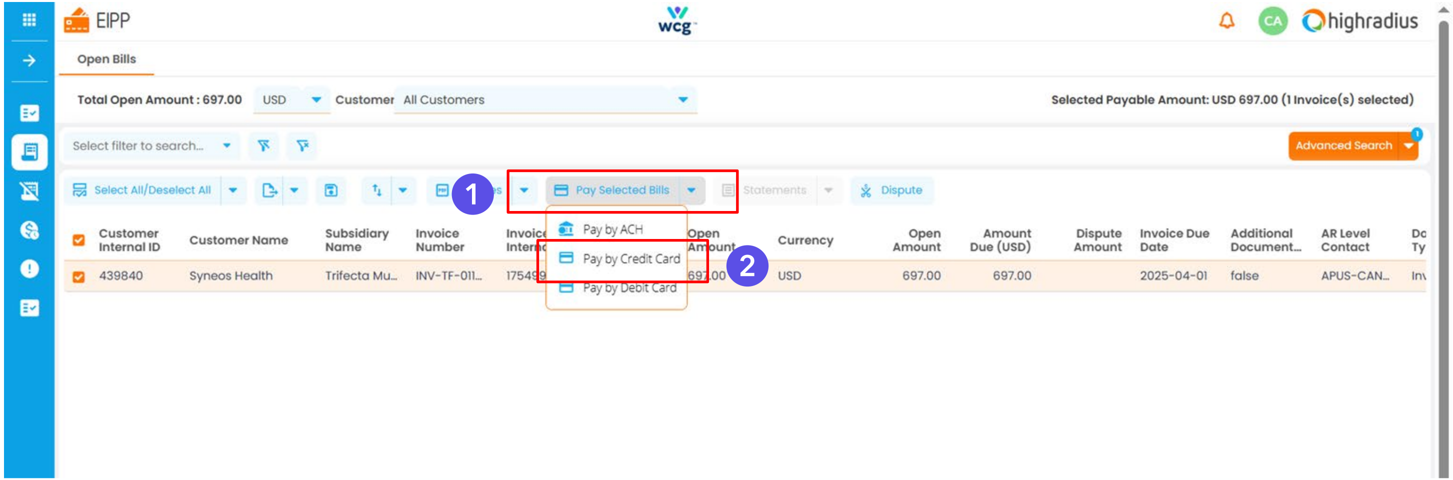
Making a Credit Card Payment

Select Credit Card Payment Option → Review Payable Amount → Add/Select Credit Card Details to Pay

Making a Credit Card Payment

Making a Credit Card Payment

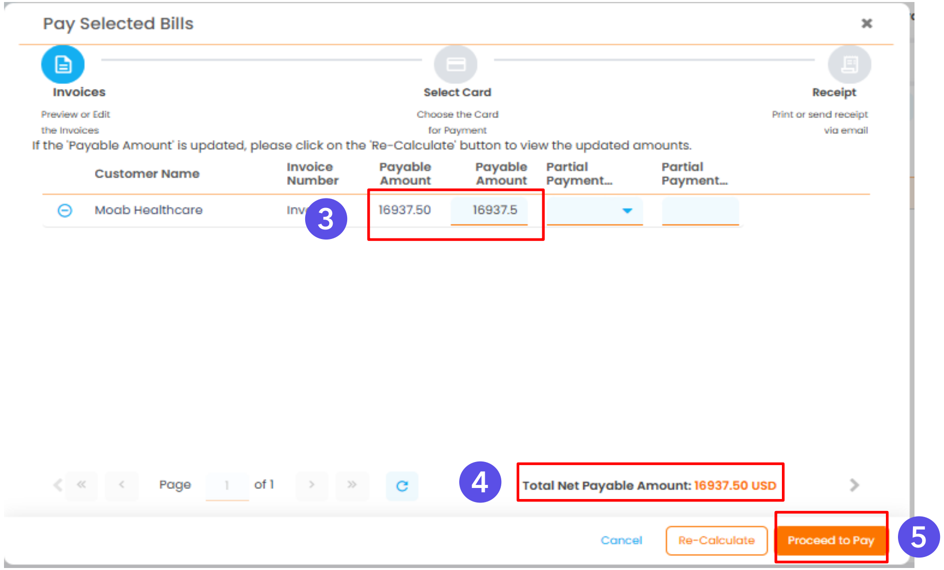
Select Credit Card Payment Option



1. Select the invoice(s) to be paid.
2. Now select the **required payment method** from the options, for example, **Pay by Credit Card**.

Making a Credit Card Payment

Review Payable Amount

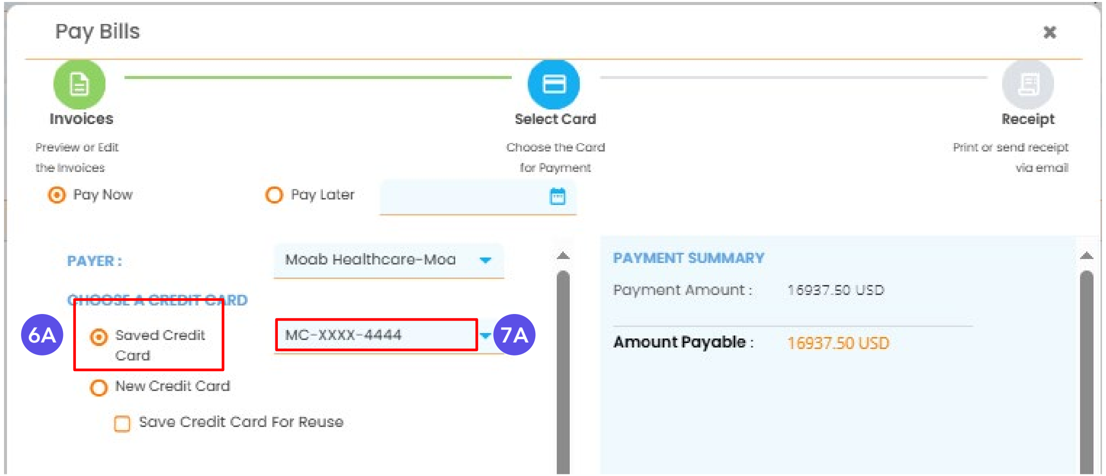


3. Review the amount to be paid.
4. Check the **Total Net Payable Amount**.
5. Click on **Proceed to Pay**.

Note: In case of a partial payment, it is mandatory to provide Partial payment reasons and comments.

Making a Credit Card Payment - Saved Credit Card

Add/Select Credit Card Details to Pay

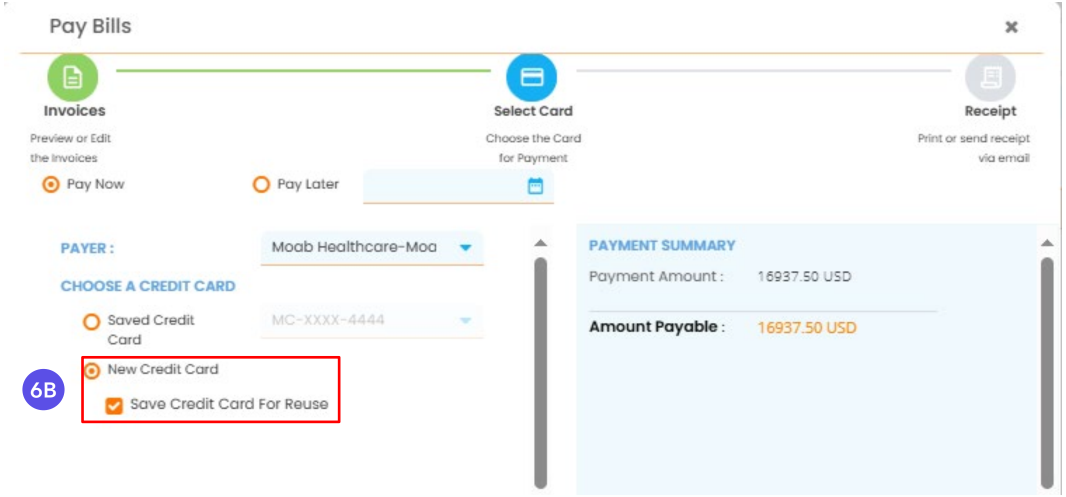


6A Select the **Saved Credit Card** option to make payment with saved card details.

7A Select the required credit card from the dropdown.

Making a Credit Card Payment - New Credit Card

Add/Select Credit Card Details to Pay

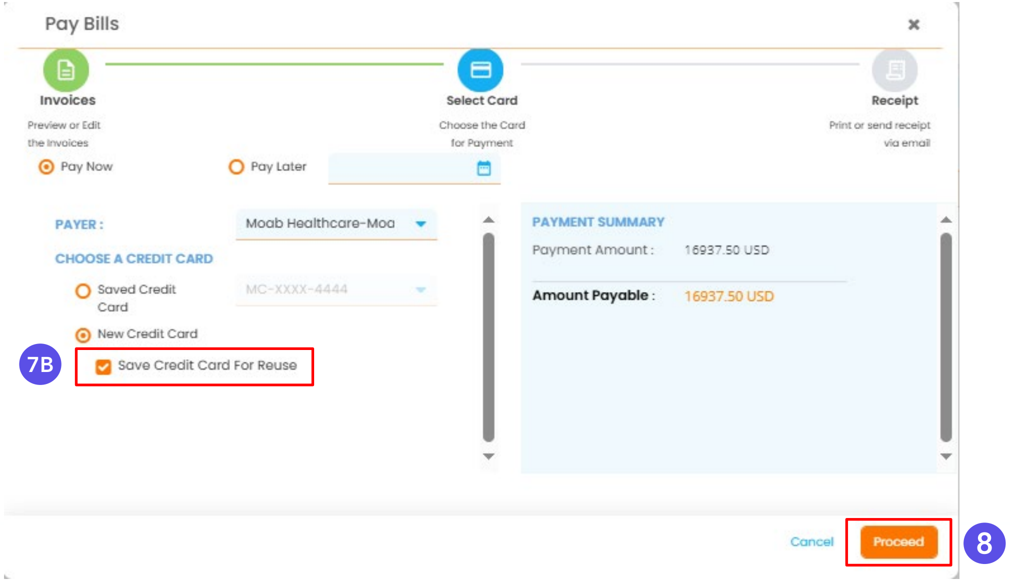


Alternatively, if you want to make payment using a new credit card then refer below:

6B Select the **New Credit Card** radio button to make payment with new card details.

Making a Credit Card Payment - New Credit Card

Add/Select Credit Card Details to Pay

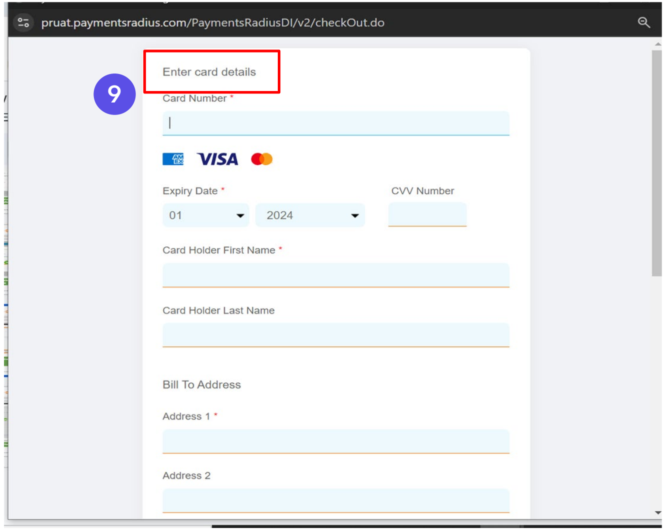


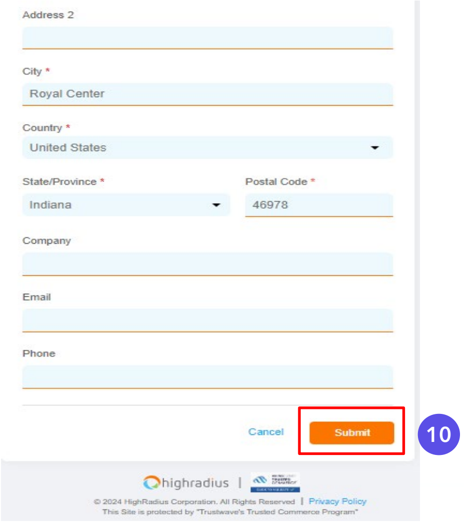
7B Click the **Save Credit Card For Reuse** button to save the card details for future use.

8 Click the **Proceed** button to continue.

Making a Credit Card Payment - New Credit Card

Add/Select Credit Card Details to Pay





9 Add the new credit card details such as **Card Type**, **Card Number**, **etc.** (Fields marked with an asterisk are mandatory to fill.)

10 Click the **Submit** button.

Learning Objectives

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In this section, you'll learn about the following:

Introductions

- Explain the complete User Journey for EIPP Presentment workflow.

Action Required Prior to Viewing/ Downloading Invoices or Statement:

- Access the Open Bills tab.
- View the AR invoices.
- Select the AR invoices.

Do's and Don'ts

- Describe the best practices to follow and not-to-follow during presentment workflow.

Learning Steps

Bank Account Management (U.S.)

Administration → Manage Bank Accounts → Bank Account Management

Credit Card Management

Manage Credit Cards → Credit Card Management

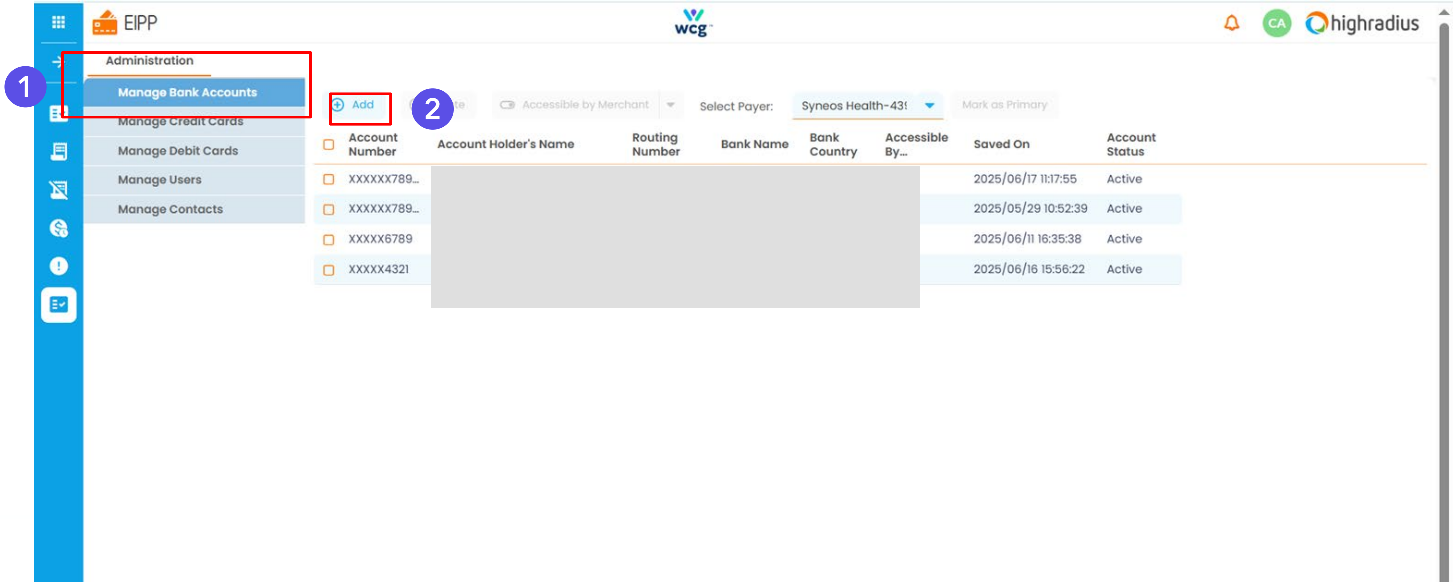
Learning Steps Continued

Payment History	Payment History →	Export Functionality
Contact Management	Administration Tab →	Manage Contacts
User Management	Administration Tab →	Manage Users

Bank Account Management

Bank Account Management (U.S.)

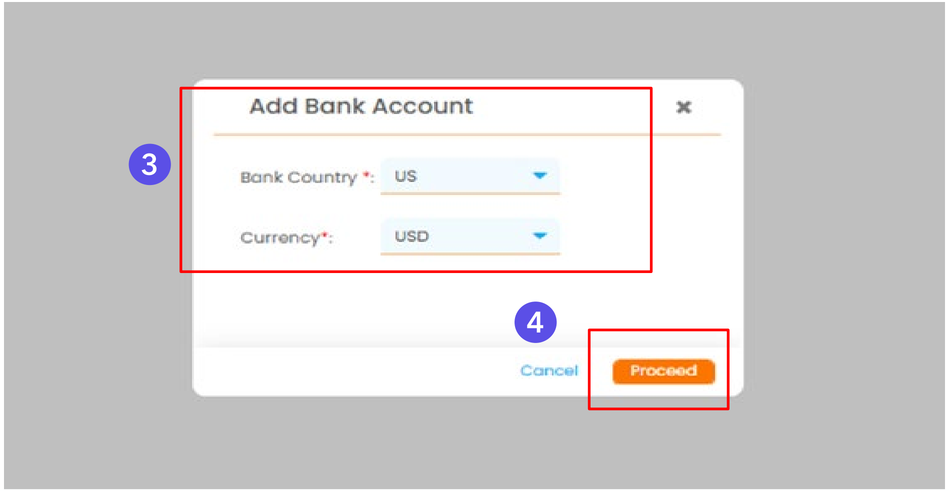
Manage Bank Accounts



1. Navigate to the Administration tab and go to **Manage Bank Accounts** option under the Administration tab.
2. Click on the **Add** button.

Bank Account Management (U.S.) - Bank Account Addition

Bank Account Management

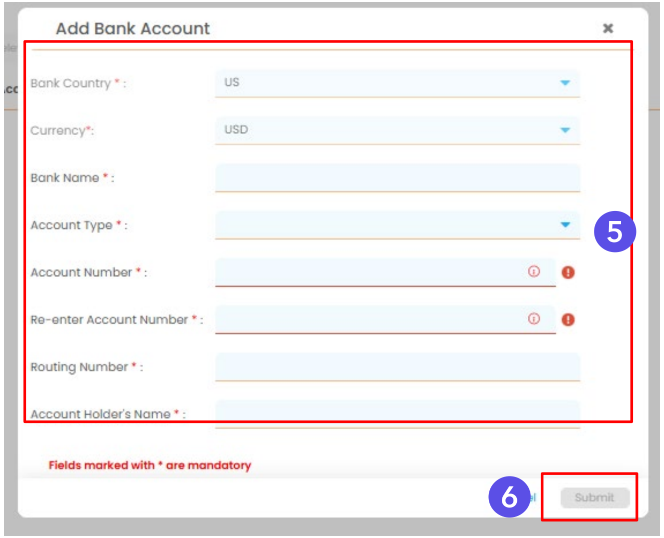


3 The bank country and currency will be selected by default.

4 Click the **Proceed** button to continue with the process.

Bank Account Management (U.S.) - Bank Account Addition

Bank Account Management

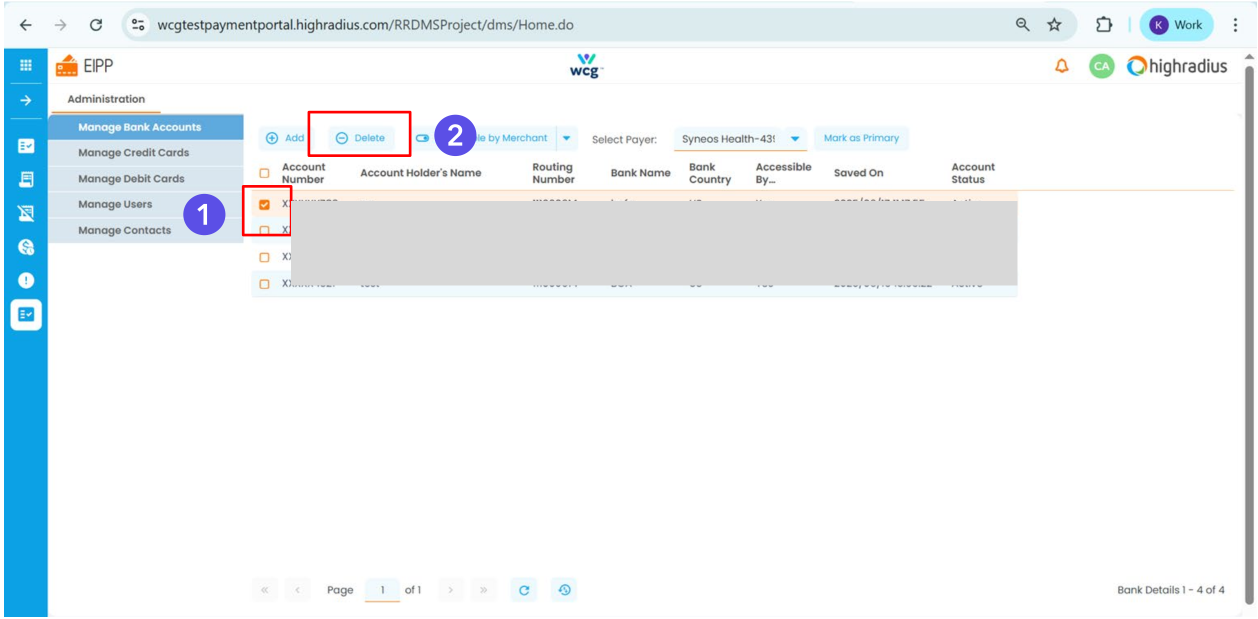


5. Fill the required fields such as **Bank Name**, **Account Type**, **Account Number**, **Routing Number** and **Account Holder**'s Name.
6. Click the **Submit** button to save the bank account.

Note: All the fields marked with an asterisk are mandatory to fill.

Bank Account Management (U.S.) - Bank Account Deletion

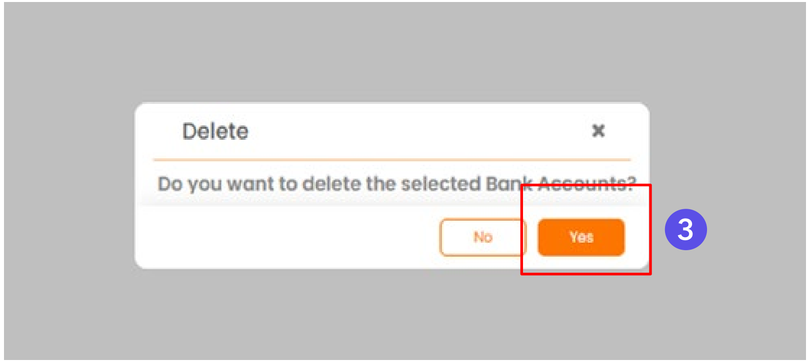
Bank Account Management



1. Select the **checkbox** to select the bank account record.
2. Click the **Delete** button to delete the bank account.

Bank Account Management (U.S.) - Bank Account Deletion

Bank Account Management

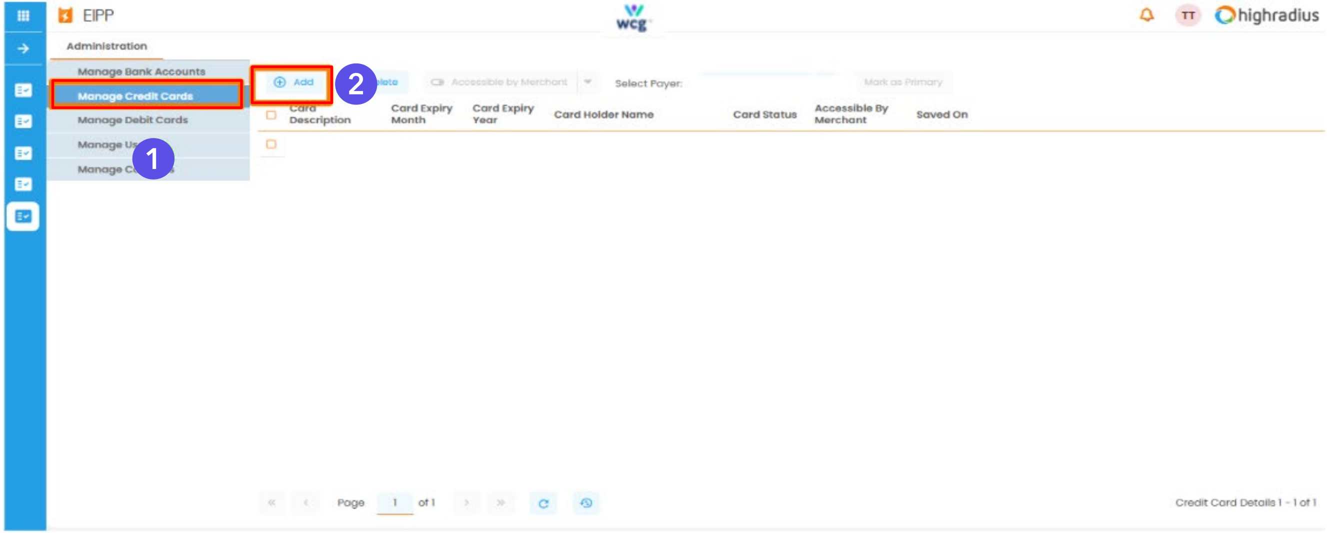


3 Click **Yes** to confirm the deletion.

Credit Card Management

Credit Card Management

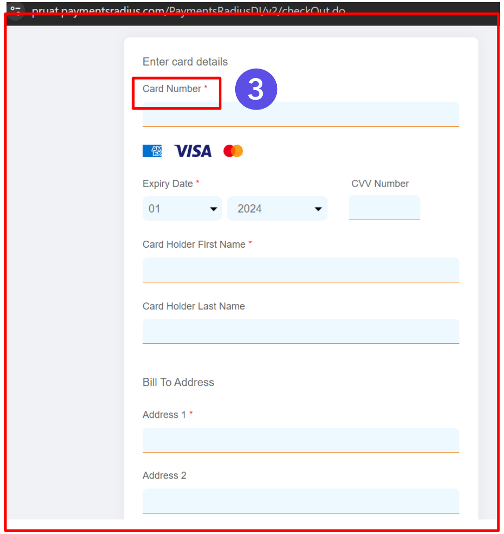
Manage Credit Cards

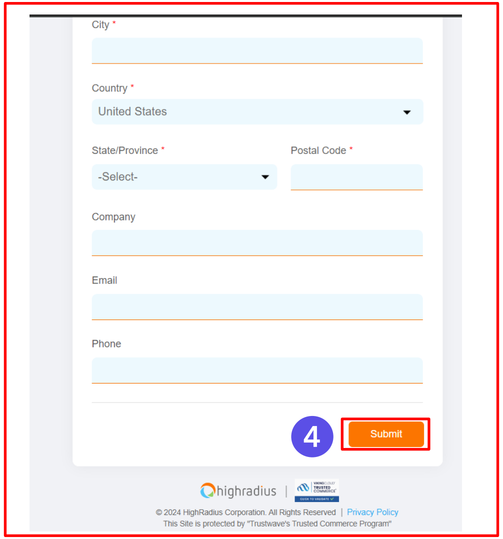


1. Select the **Manage Credit Cards** menu to manage the credit cards.
2. Click the **Add** button to add a new card.

Credit Card Management - Card Addition

Credit Card Management





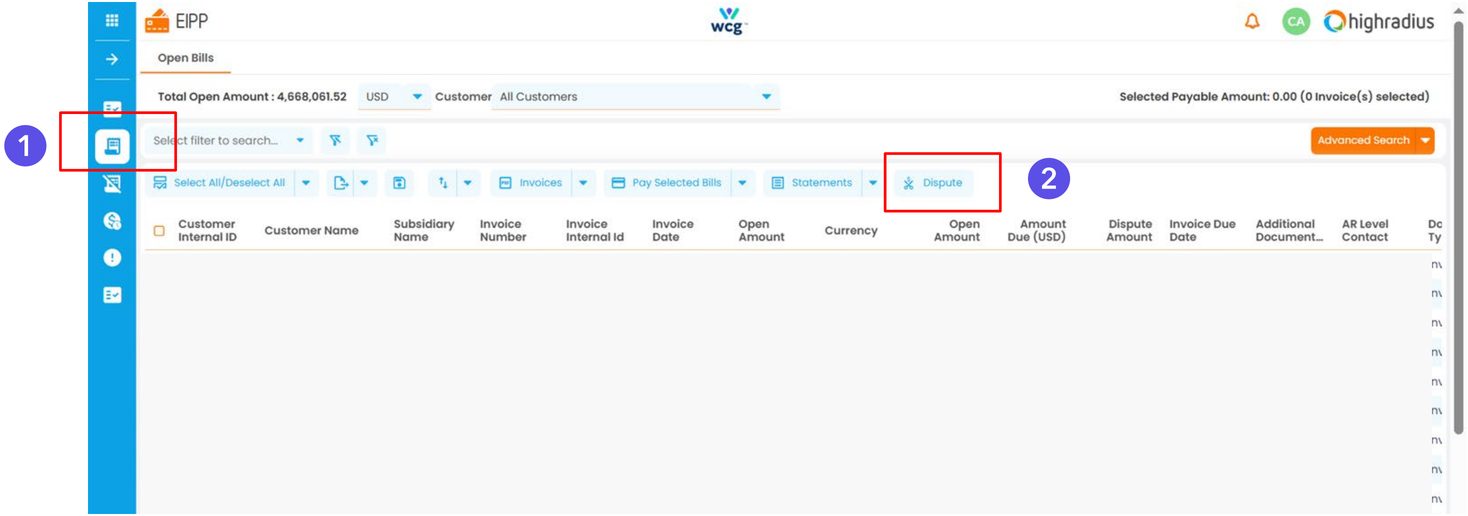
3 Fill the required fields such as **Card Type**, **Card Number**, **Expiry Date**, etc. All the fields marked with an asterisk are mandatory to fill.

4 Click the **Submit** button to add the card.

Disputes

Disputes

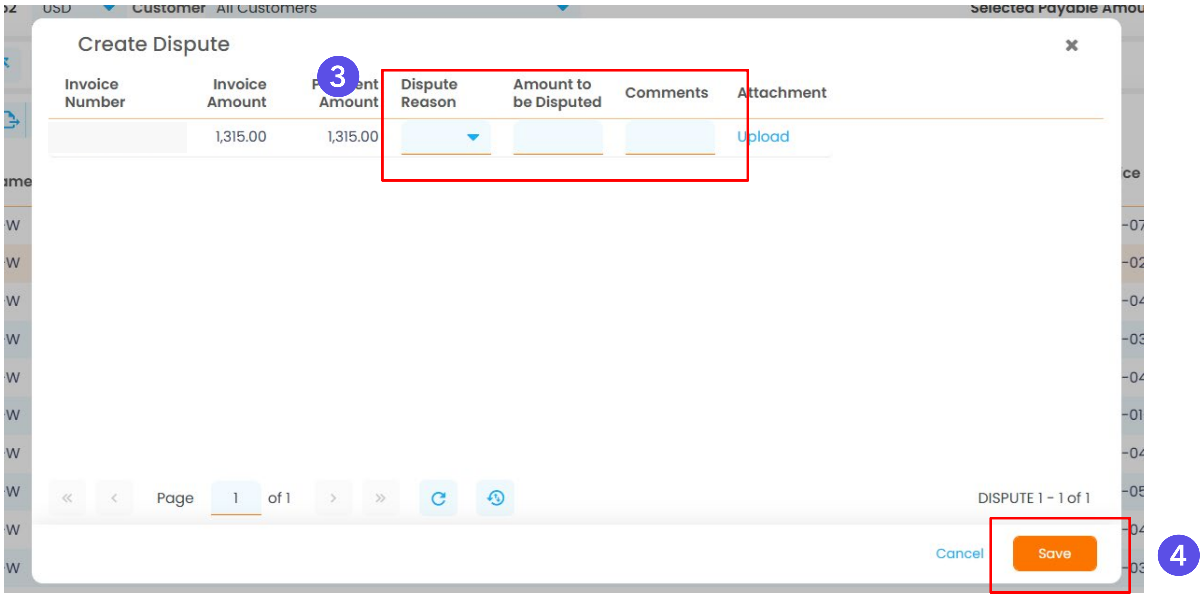
Open Bills Tab



1. Navigate to the **Open Bills** sub-tab under the EIPP tab and select an invoice.
2. Click the **Dispute** button to raise a dispute.

Disputes

Open Bills Tab

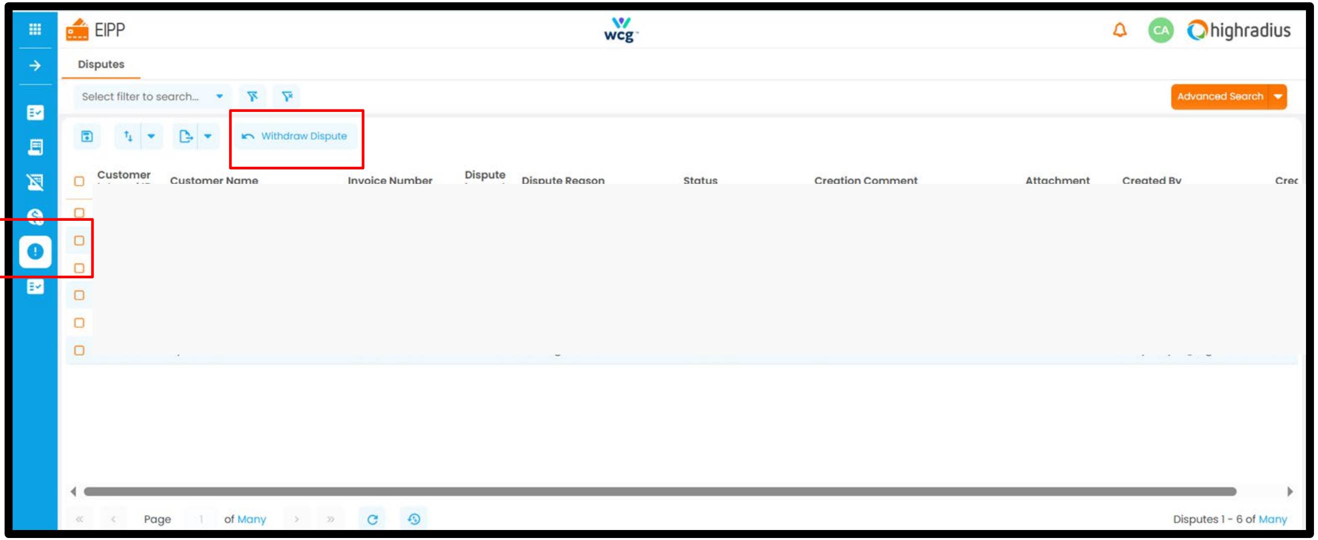


3 Select the **Dispute Reason Code** and the **Amount to be Disputed** and add comments if any.

4 Click on the **Save** button to raise a dispute.

Withdraw Disputes

EIPP Tab

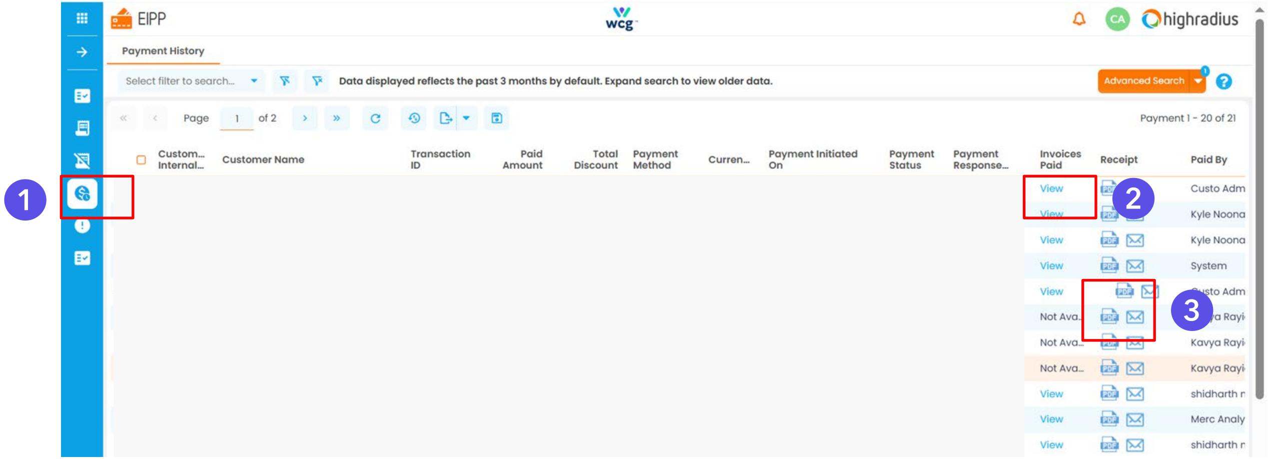


1. Click on the **Disputes Tab** under EIPP to track the raised disputes.
2. Select the **Dispute Entry** that is to be withdrawn.
3. Click on the **Withdraw Dispute** button.

Payment History and Export Functionality

Key Tabs: Payment History

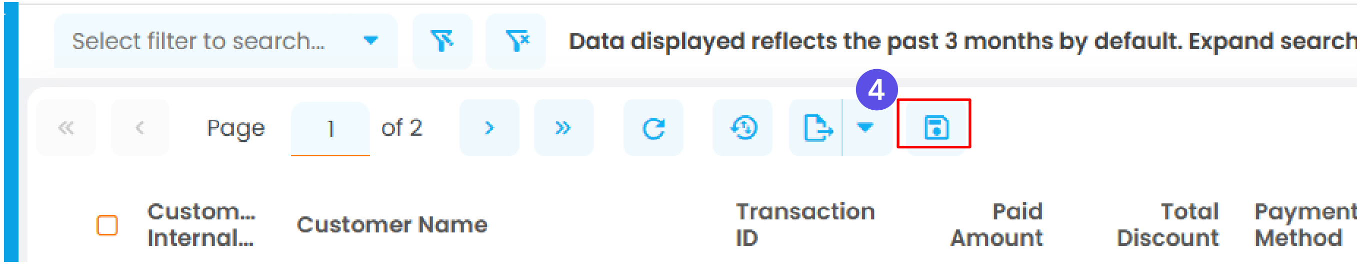
Payment History Tab



1. Navigate to the **Payment History** sub-tab in the EIPP tab to view the payment details of the transactions made in the EIPP portal.
2. Click the **View** link under the **Invoices Paid** field to view the invoices paid as a part of that particular transaction.
3. Click on the icons under the **Receipt** field to print or email the payment receipt for that transaction.

Key Tabs: Payment History

Export Functionality

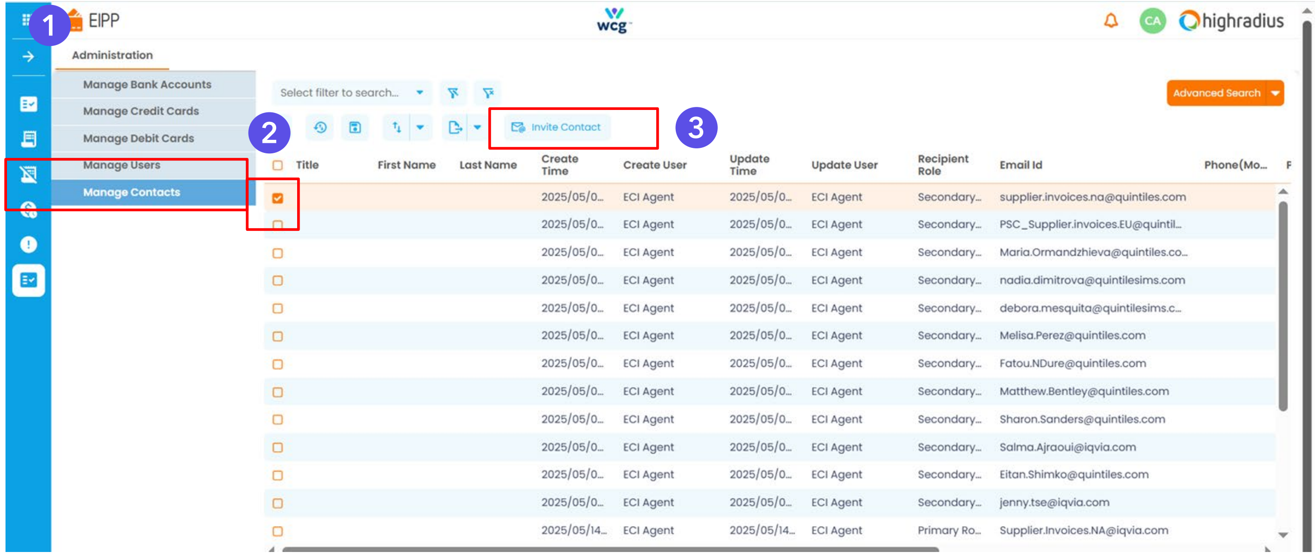


4 Click on the **export button** to select the export type.

Contact Management

Contact Management - Invite Contact

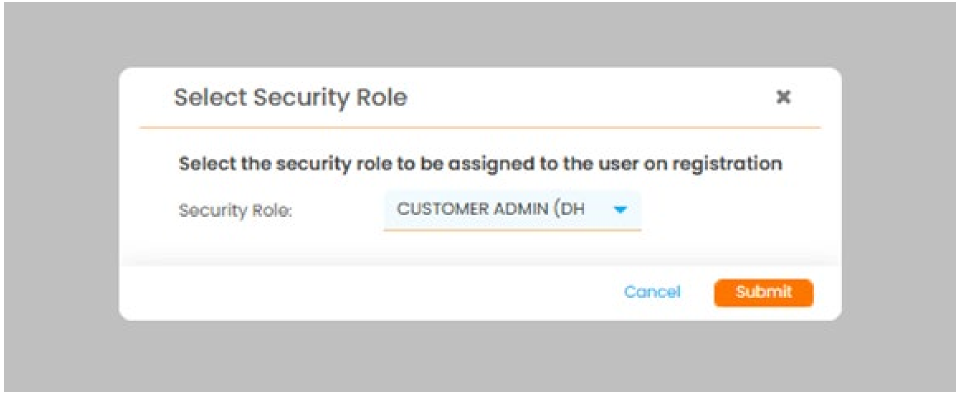
Manage Contacts



1. Navigate to the **Administration** sub-tab under the EIPP tab.
2. Select **Manage Contacts**.
3. Select the data record and click on **Invite Contact**.

Contact Management - Invite Contact

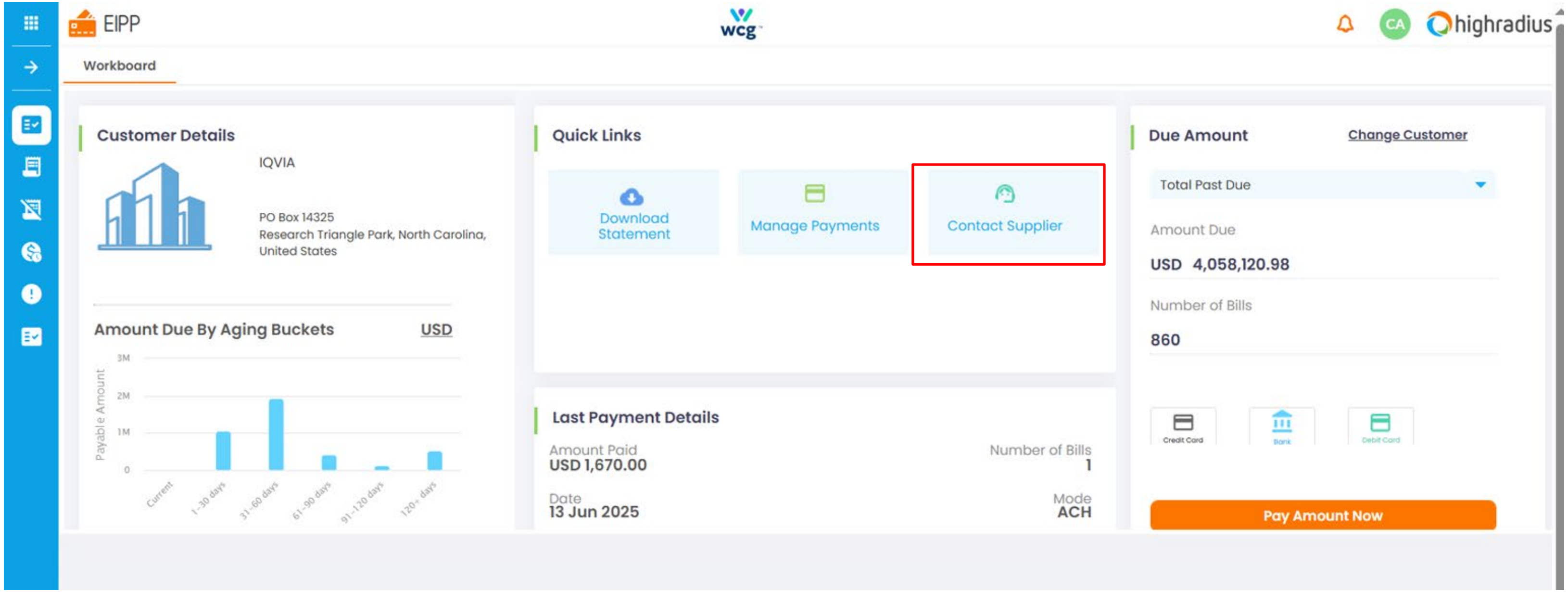
Manage Contact



4 Select your **Customer Role** and then click **Submit**.

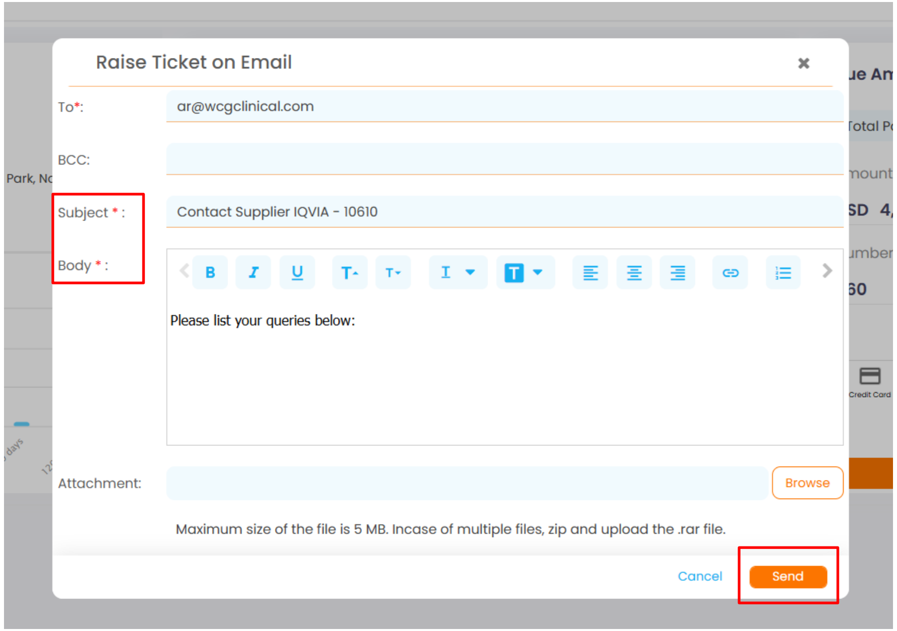
Contact Supplier

Workboard



Navigate to the **Workboard** tab and click on **Contact Supplier**.

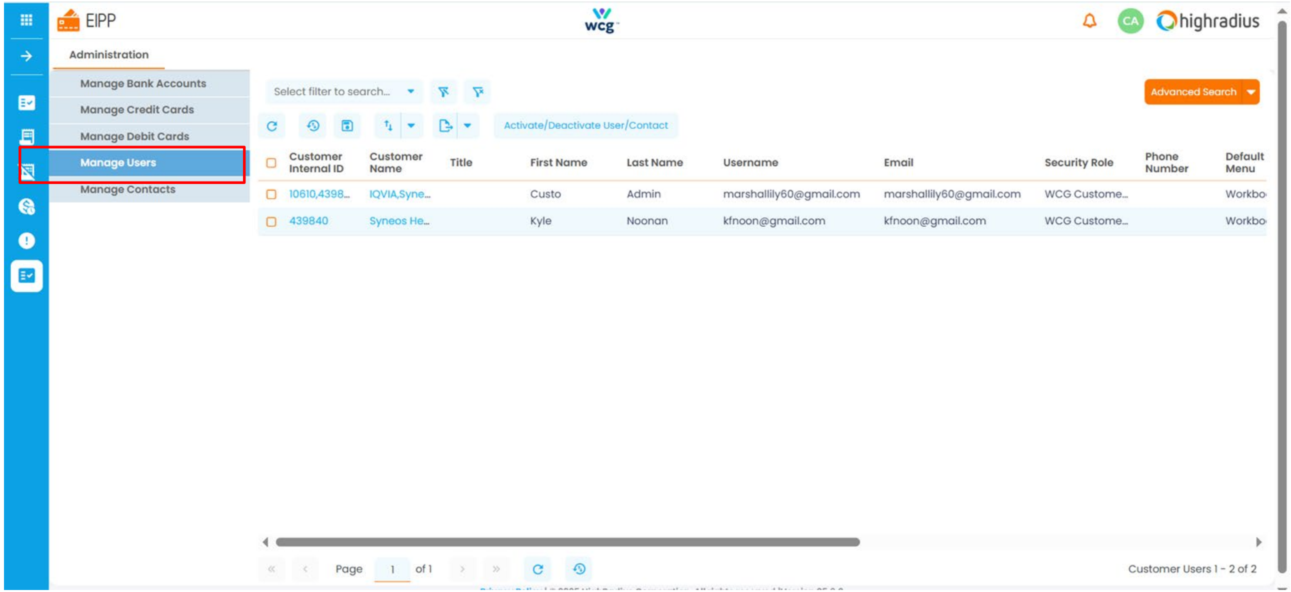
Contact Supplier



This screen will open. You can modify the subject and body as per your requirement and click **Send**.

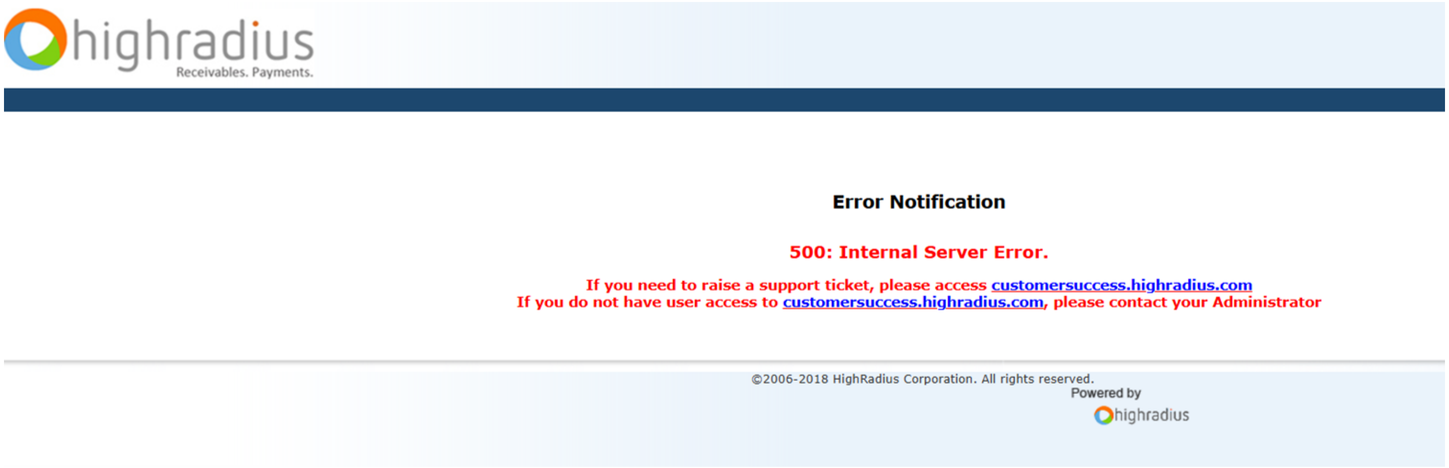
User Management

User Management - Administration



Navigate to the **Administration** sub-tab under the EIPP tab and then click on **Manage Users**.

To Avoid Any Server-Based Error



- To avoid any server-based error issues, avoid clicking on the **Back** and the **Refresh** button while using the payment portal. Since EIPP is a payment platform, resubmission requests are not allowed to ensure compliance with security standards.
- Use the URL to login to the portal again if logged out due to resubmission error.

Thank you!

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