



A GUIDE BY ADVICEPAY

How Clients Make a Payment



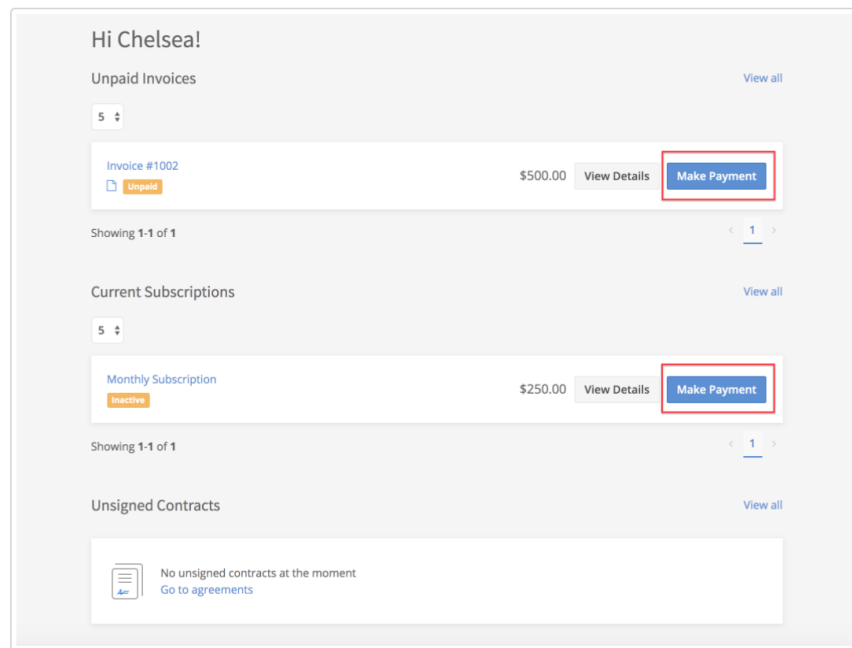
Have Questions?

Contact support@advicepay.com

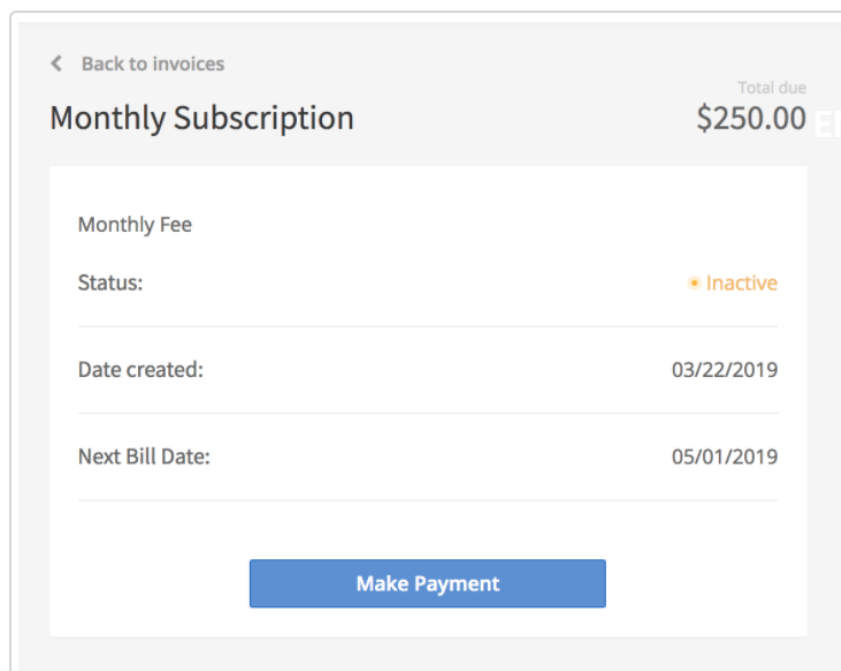
Our aim is to make paying invoices fast and efficient for you, which is why it only takes three steps to make a payment from start to finish on AdvicePay.

Step 1

Click the blue Make Payment button on the unpaid or inactive invoice you want to pay. (If you don't see anything listed on your dashboard, this means your advisor has not yet issued you an invoice!)



Proceed with clicking the next blue Make Payment button after reviewing the invoice details:



Step 2

Choose a method for adding a bank account.

Note: Note: If your advisor has chosen to only be paid via ACH (checking account), you will see only see that method available as an option.

1 Select Payment Method 2 Confirm Payment


Bank Account
Easily connect your bank account to make payments electronically.

New bank account

Credit Card
Add your credit card information to make payments directly from your cards.

New credit card

Digital Wallet
Make payments via Apple Pay, Google Pay, or Microsoft Pay

Pay now 

Note: This payment may appear as Stripe Inc on your card or bank statement.

When paying via ACH, we have over 500 banks available for quick automatic linking via our Plaid integration under the 'Connect' option. To add your account this way, you'll need to know your online banking login information. Some banks may ask you to take extra steps to verify your identity and will send you a verification number via text.

Step 3

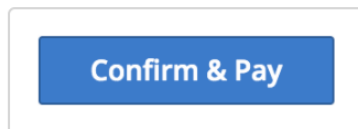
Once the account you want to use is added and selected, click Next to make a final review of your payment. To go over the full details of your payment, click View details

For subscriptions with due dates set in the future, note that you will not be charged immediately upon authorizing the invoice -- rather, your account will be debited on the date indicated:

✓ Select Payment Method	2 Confirm Payment
Payment Details	Minimize
Subscription (will charge automatically on 05/01/2019):	\$250.00
Total Due Today:	\$0.00

Step 4

When you're ready, click the Confirm & Pay button to submit your payment/authorization. We will not charge your account or activate your subscription until this button is clicked!



Once successfully submitted, you will be redirected to a screen confirming your payment. You will also receive a confirmation via email.

