

A GUIDE BY ADVICEPAY

How Clients Make a Payment

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How to Make a Payment Without Logging In to an Advicepay Account

With an ACH US Bank Account or a Credit Card

We love making processes fast and efficient! Whether you have a registered account with AdvicePay or not, you never have to log in to make a payment. This means it takes just a couple of quick steps to choose which method you want to pay with, enter your payment info, and go on with your day. This guide details the payment process with a credit card or ACH without logging in.

Getting Started

There are two ways to access the payment page without creating or logging into an AdvicePay account:

1. Click the invoice button from a notification email
2. Enter the URL provided by your advisor into an address bar

Once on the payment page, you'll find the available payment types listed on the left side, while the right side displays your invoice, payment due amount, and the 'pay' button (see image below).

Note: You do have the option to log in using the sign-in option once on the payment page (located under the payment options on the left) or continue with the following steps to pay without logging in.

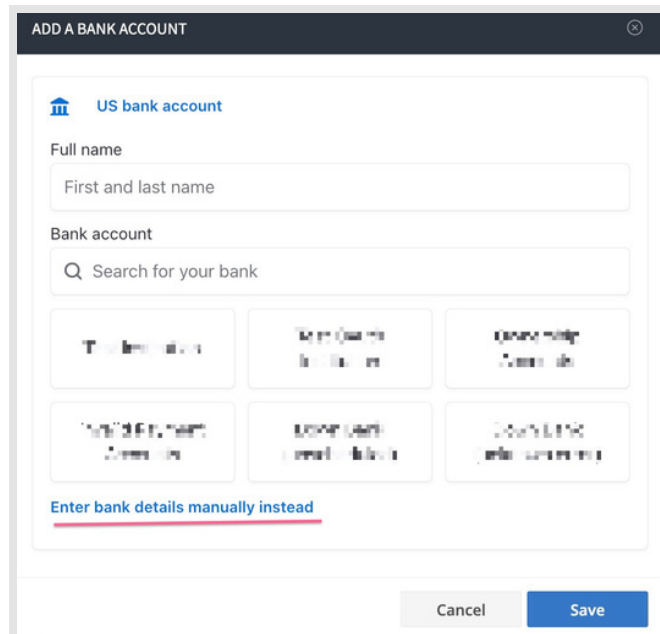
STEP 1.

Click on **US Bank Account** or **Credit Card** based on which option you want to pay with.

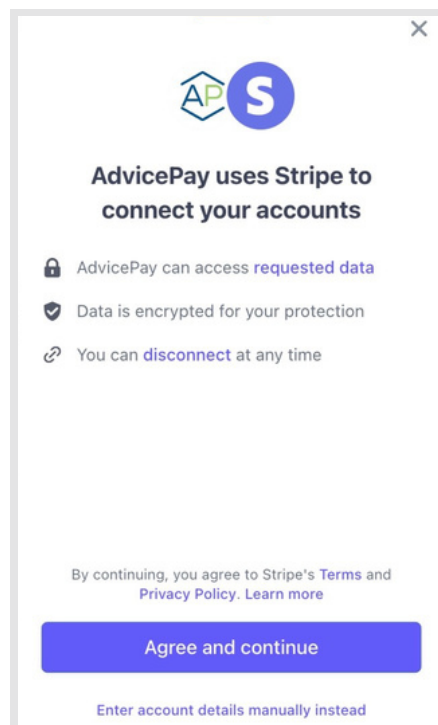
The screenshot displays the AdvicePay payment interface. On the left, there are two radio button options: "US bank account" (selected) and "Card". Below these options is a link that says "Sign in or create an account to save payment for future use". On the right, the invoice details are shown for "Wealth Time Management Co. Alice Hossfeld". The invoice includes a "One-Time Payment" of \$400.00 due on 01/27/2024, with a link to "View Invoice 1018". Below this, it shows "Due Today" for \$400.00. At the bottom right, there is a prominent blue button labeled "Pay \$400.00".

STEP 2a. – US Bank Account

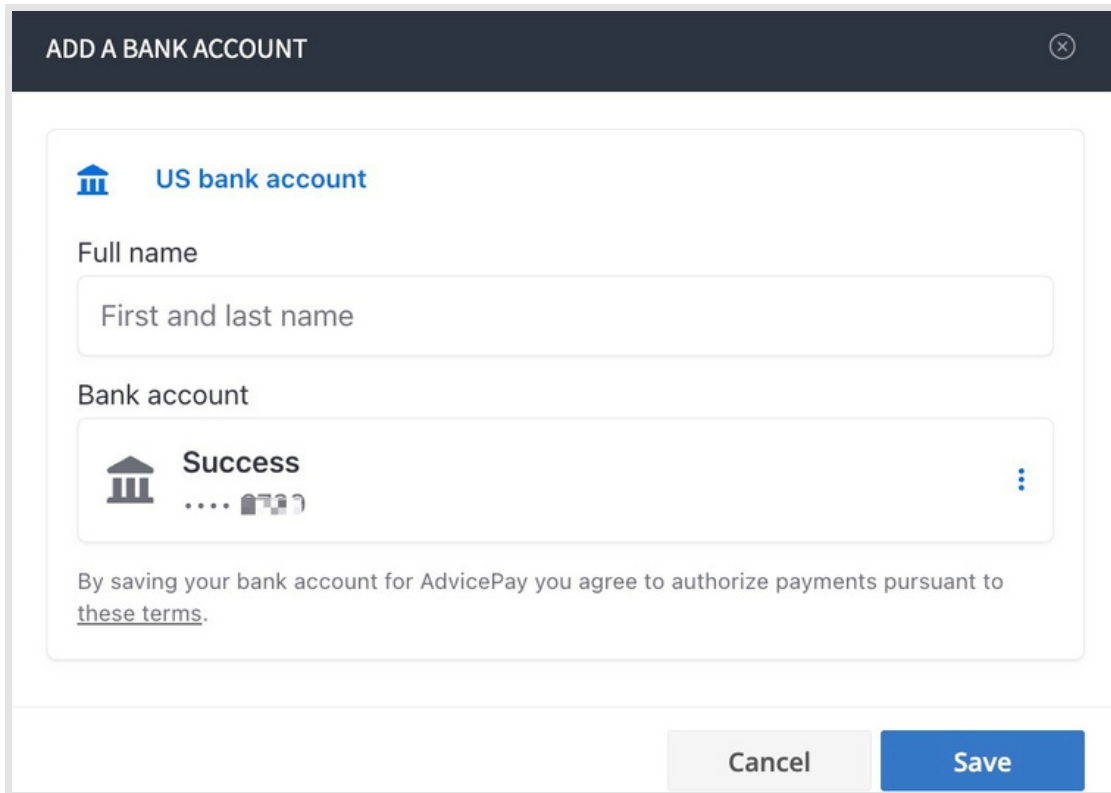
If you choose to pay with a US bank account you will be prompted to enter your bank account information. Type your **Full Name** > search for and select your **Bank Account** or **Enter Bank Details Manually Instead** > click **Save**.



Next, you will go through the prompts with Stripe on a similar screen. Click **Agree and Continue** > select your **Bank Account** > click **Connect Account** > select **Continue with AdvicePay**.

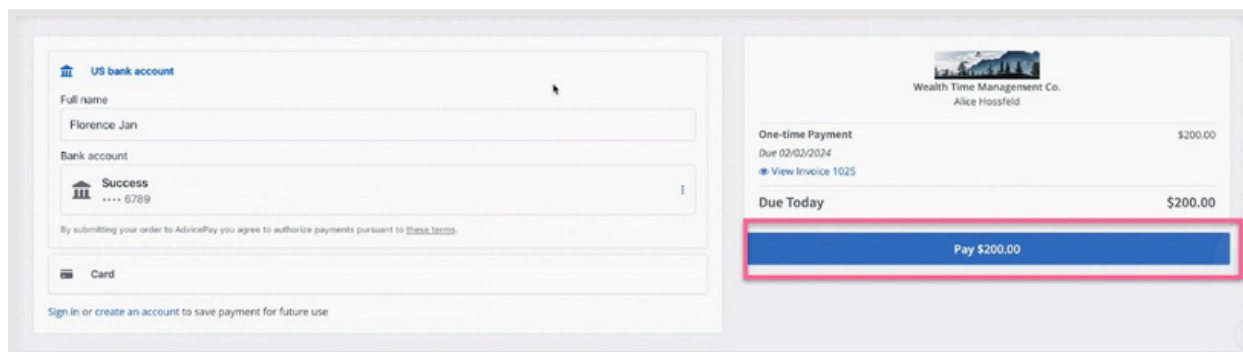


Once you've added your bank account, you'll be able to view the account along with the last few digits displayed under **Bank Account**. Double-check all the details are correct and click **Save**.



The screenshot shows a modal window titled "ADD A BANK ACCOUNT" with a close button in the top right corner. Inside the modal, there is a section for "US bank account" with a blue icon of a bank building. Below this, there is a "Full name" field containing the text "First and last name". Underneath is a "Bank account" section featuring a dropdown menu with a "Success" bank icon and the text "Success" followed by ".... 6789" and a three-dot menu icon. Below the dropdown, there is a line of text: "By saving your bank account for AdvicePay you agree to authorize payments pursuant to [these terms](#)." At the bottom of the modal, there are two buttons: a grey "Cancel" button and a blue "Save" button.

Next, click **Pay** and your payment will be submitted.



The screenshot shows a payment confirmation screen. On the left, there is a summary of the bank account information, including the "Full name" (Florence Jan) and "Bank account" (Success, 6789). Below this, there is a "Card" option. On the right, there is a summary of the payment details for "Wealth Time Management Co. Alice Hossfeld". It shows a "One-time Payment" of \$200.00 due on 02/02/2024, with a link to "View Invoice 1025". Below this, it shows "Due Today" for \$200.00. At the bottom right, there is a prominent blue button labeled "Pay \$200.00" which is highlighted with a red rectangular border.

STEP 2b. – Credit Card

If you choose to pay with a credit card you will be prompted to enter your credit account information. Enter your **Card Number**, **Expiration**, **CVC**, **Country**, and **ZIP**. Click **Pay** and your payment will be submitted.

US bank account

Card

Card number: 4242 4242 4242 4242 (VISA)

Expiration: 12 / 30

CVC: 123

Country: United States

ZIP: 12345

Sign in or create an account to save payment for future use

Wealth Time Management Co.
Alice Hossfeld

One-time Payment \$100.00
Due 02/02/2024
[View Invoice 1030](#)

Due Today \$100.00

Pay \$100.00

STEP 3.

Once you click **Pay**, the screen below will show. If you are not yet registered with an AdvicePay account you can choose to register by selecting the **Create an Account** button.

Thank you for your payment!

Your \$200.00 payment to Wealth Time Management Co. has been successfully paid.

Please note that on your bank statement, this charge may appear as AdvicePay, Wealth Time Management Co., or Stripe.

To pay your invoices faster, set up your password below to create your AdvicePay account.

Create an Account

Have questions? We're here to help!

Contact us at support@advicepay.com.

Here is a Video Overview

[CLIENT PAYMENT PROCESS](#)