A GUIDE BY ADVICEPAY

# How Clients Make a Payment

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AP AdvicePay

# 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.
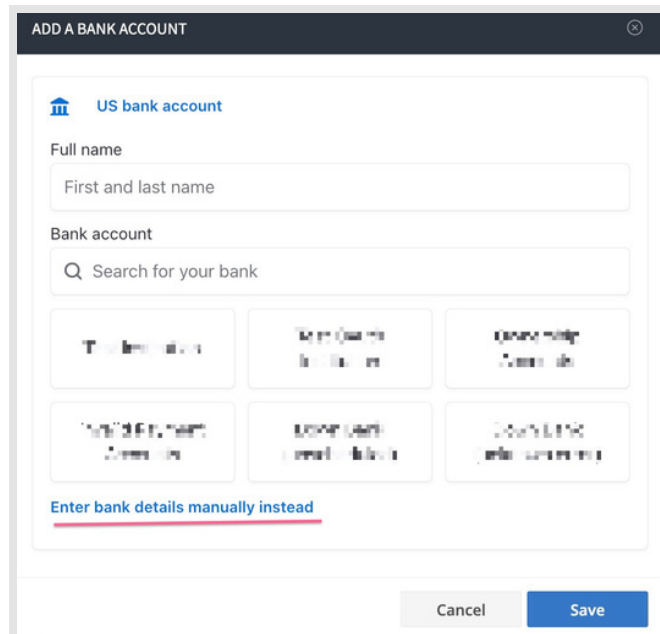
## STEP 1.

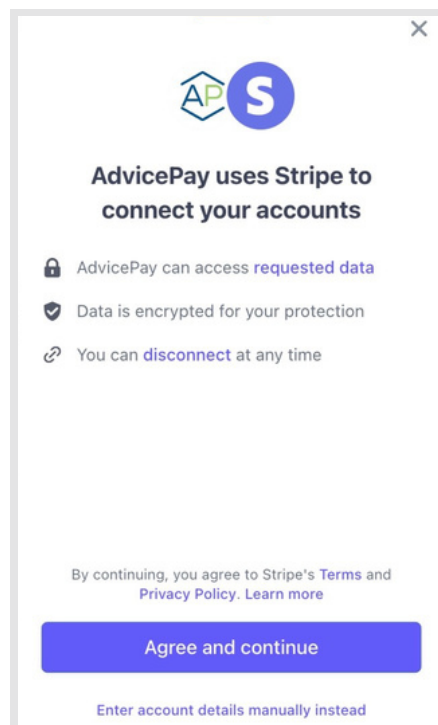Click on **US Bank Account** or **Credit Card** based on which option you want to pay with.
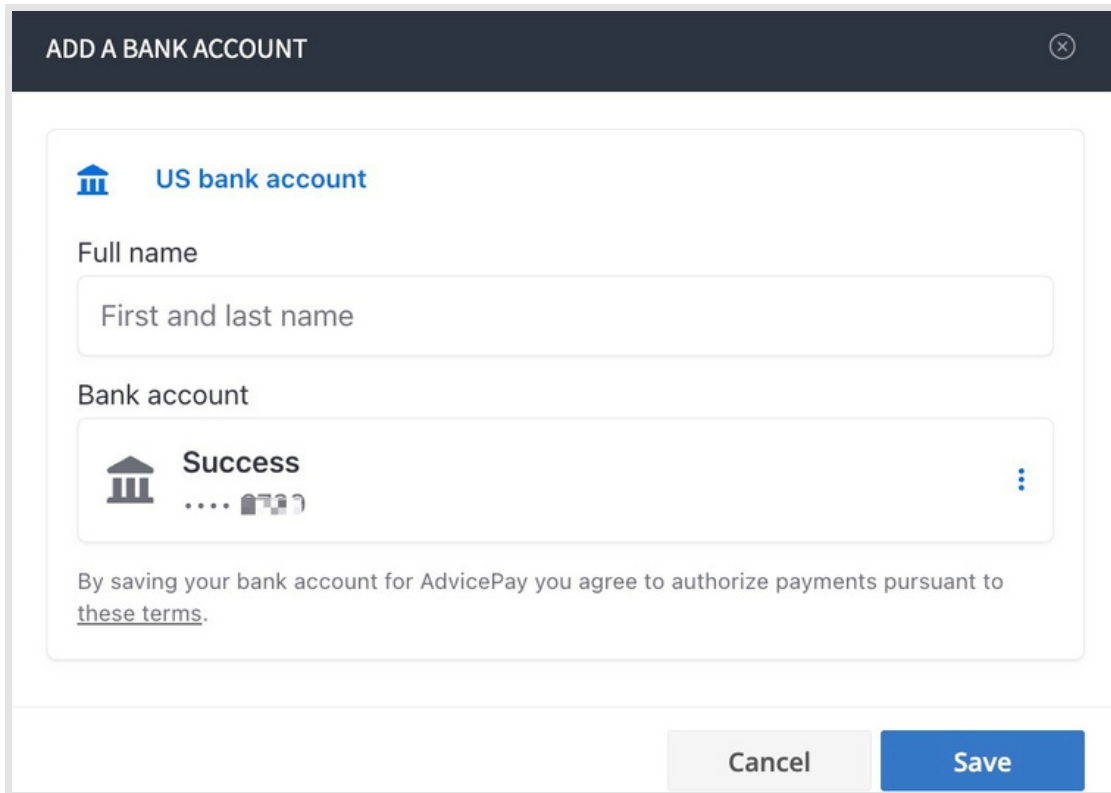
# STEP 2a. – US Bank Account

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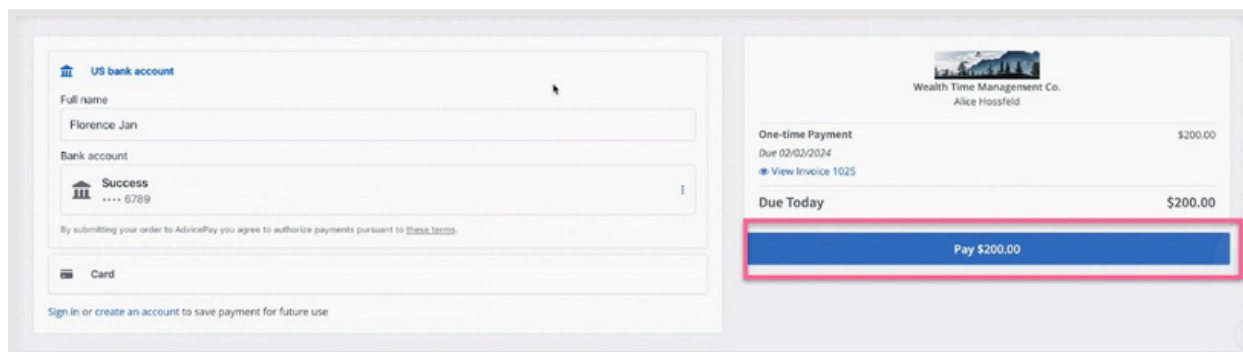
Once you've added your bank account, you'll be able to view the account along with the last few digits displayed under **Bank Account**. Double-check all the details are correct and click **Save**.



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

## 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.



## 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.



# Have questions? We're here to help!

Contact us at support@advicepay.com.

**Here is a Video Overview**

**CLIENT PAYMENT PROCESS**