INSTRUCTIONS FOR INVOICE PAYMENT BY CREDIT CARD

MAY 2022

VERSION 5

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1. INTRODUCTION

The Invoice Payment by Credit Card feature, accessed from the **Account Summary** page, allows you to pay the amount on your monthly Account Statement using a credit card.

With this feature you can securely enter a valid credit card once and reuse it the next time you make your payments. The payment will appear on your monthly Account Statement.

2. SECURE MANAGEMENT OF CREDIT CARD INFORMATION

There is secure management of the firm's credit card information when adding and selecting a credit card. The credit card number is partially masked (meaning only the first four and last four digits are displayed) when selecting a card. Information for credit cards previously entered cannot be changed and credit cards cannot be deleted.

VISA® and MasterCard® only are supported by Dye & Durham.

3. MAKING YOUR PAYMENT

After you make the payment the billing contact for your firm will receive an email confirmation with details about the purchase.

Once the purchase is made the balance will be updated in the **Account Summary** page after a couple of days. Do not expect to see a change in the balance immediately.

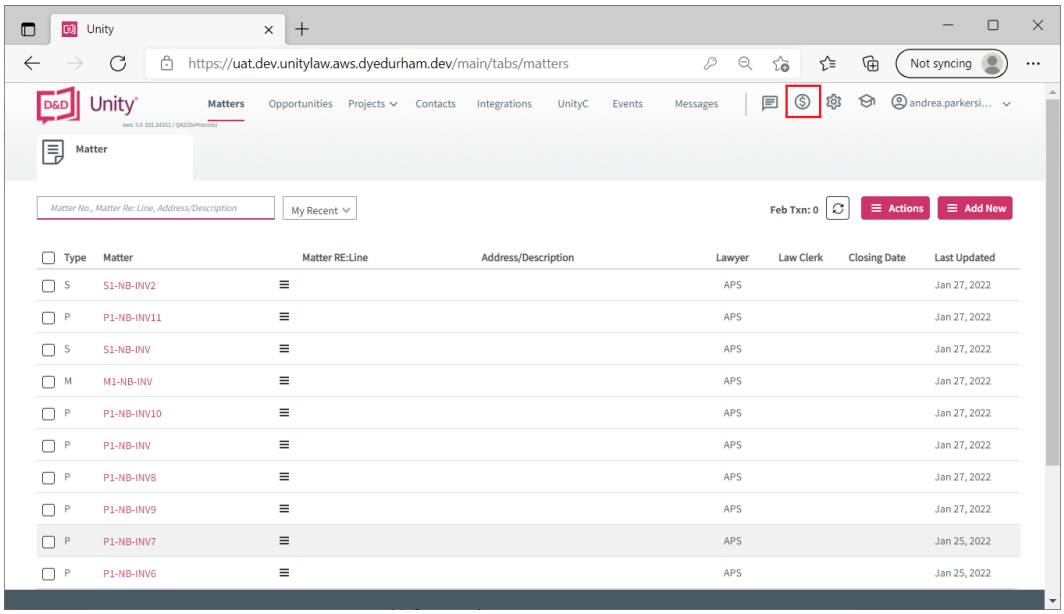
If there is an issue with your card or your billing contact did not receive the email confirmation, **do not make additional payments**. Instead, please contact the Customer Service Centre at inquiries@dyedurham.com or 1-866-367-7648 for assistance.

4. ACCESSING THE INVOICE PAYMENT PAGE

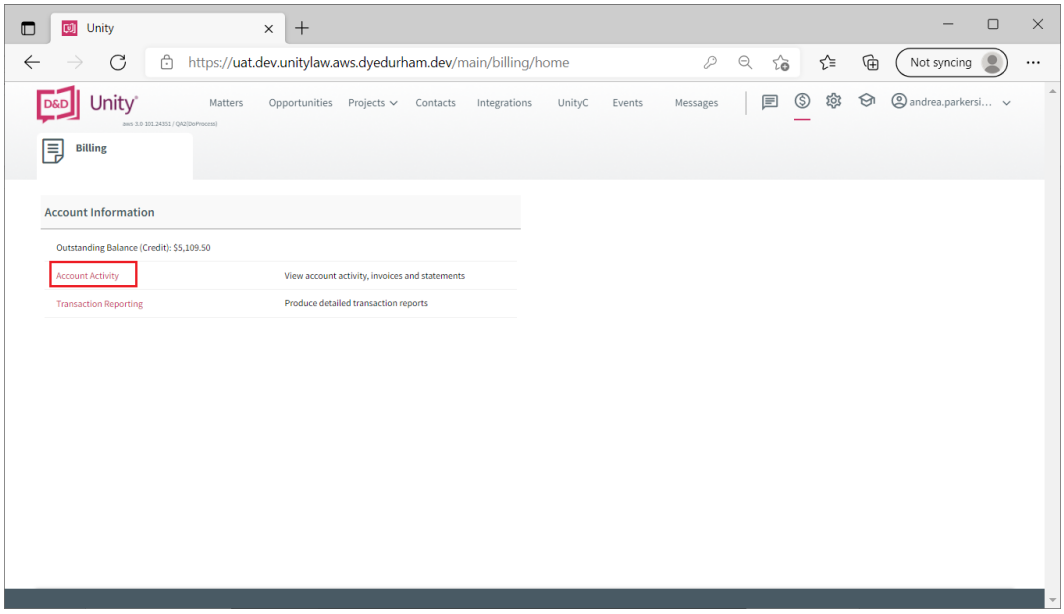
Instructions for accessing the **Pay Invoice** page differ slightly, depending on which application you are using.

4.1. ACCESSING THE PAY PAGE IN UNITY

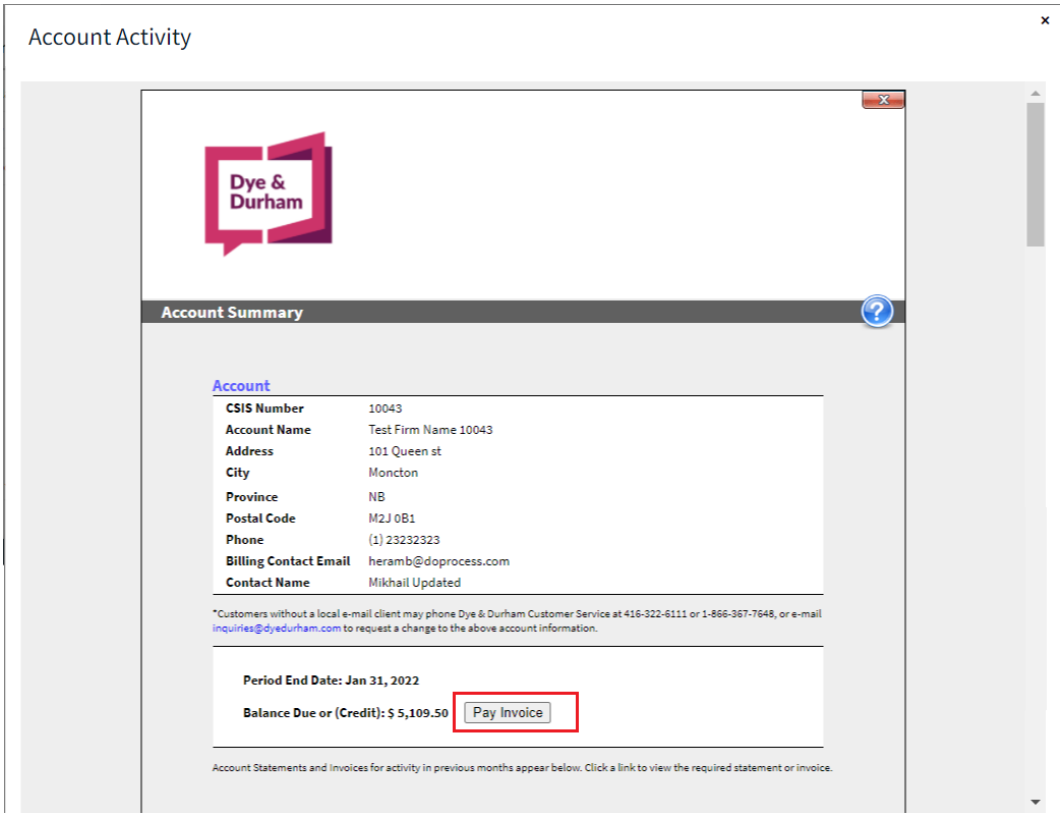
1 In Unity, click **$** in the menu bar:



2 In the **Billing** page, click **Account Activity**.

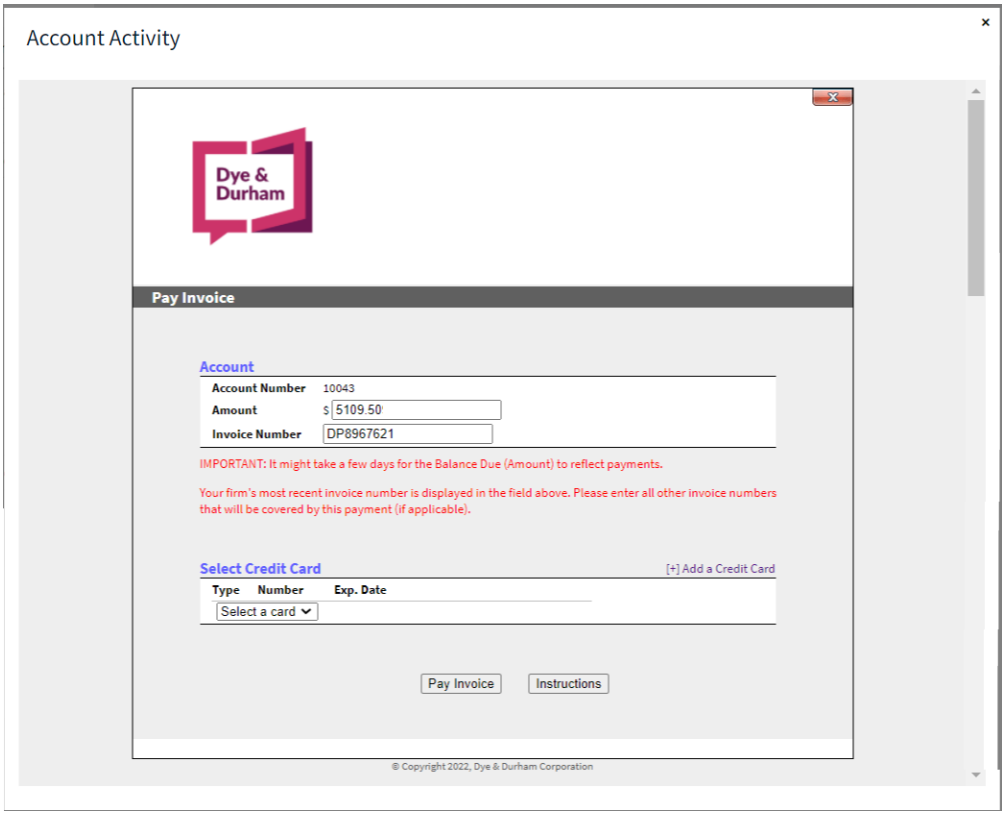


3 In the **Account Summary** page, click **Pay Invoice** which is beside the Balance Due amount.

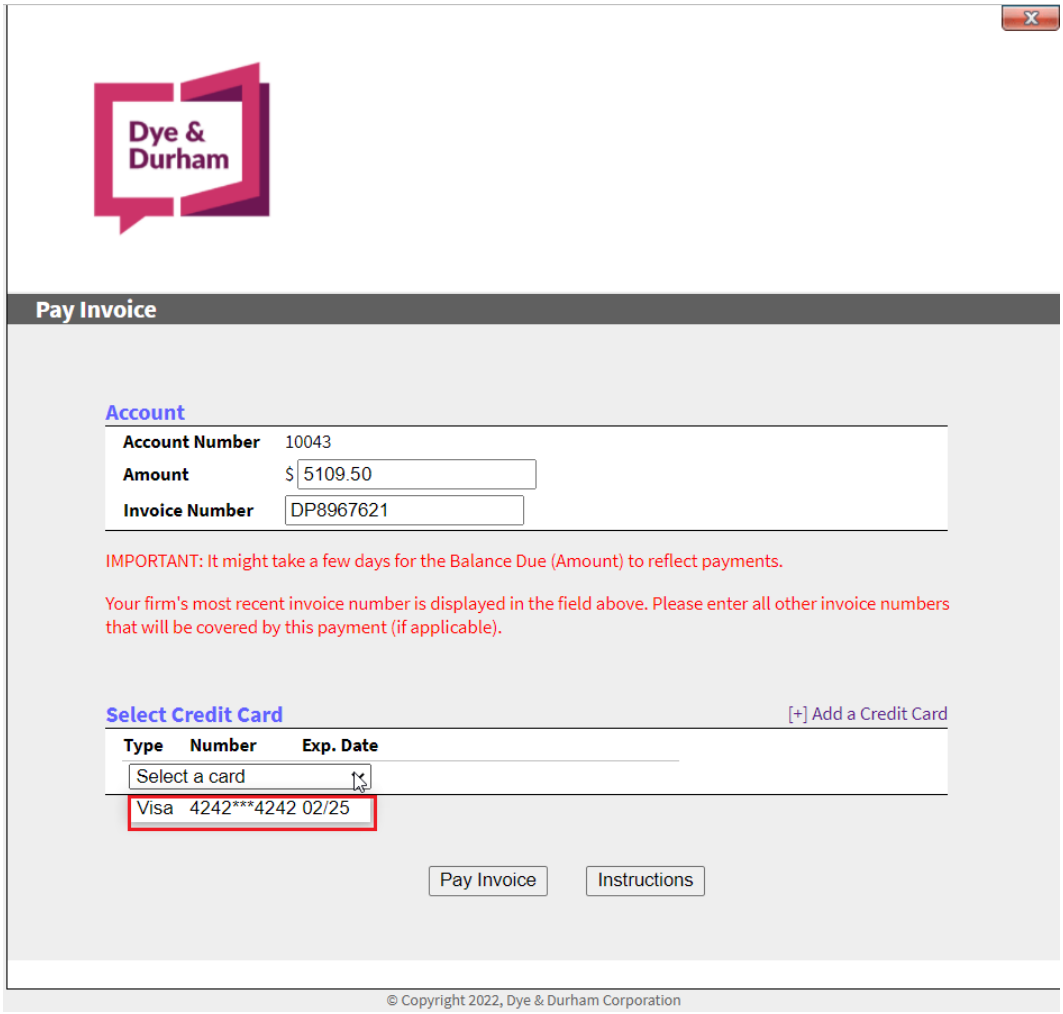


4 The **Pay Invoice** page appears with the **Balance Due** displayed in the **Amount** field. **It is strongly recommended that you pay the entire balance.**

5 The last invoice number is automatically displayed. Enter all other invoice numbers that will be covered by this payment (optional).



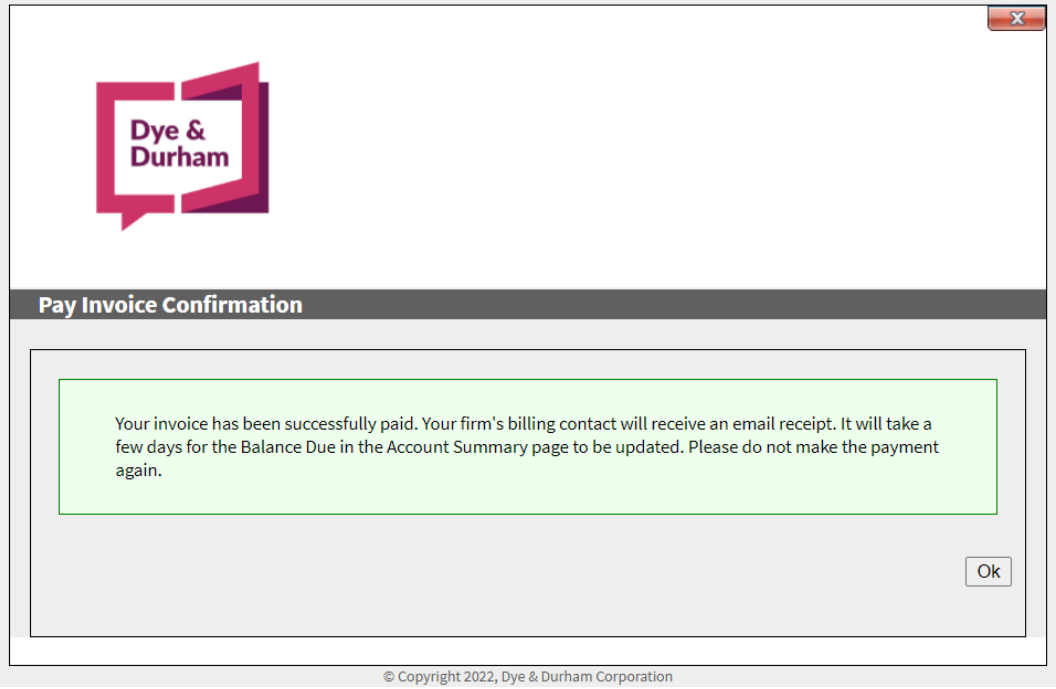
6 In the **Select Credit Card** section, click and select a card.



Note that the credit card type (Visa or Mastercard), masked number and expiry date appear for credit cards that have been added to the account. For instructions on adding a credit card, go to page 18.

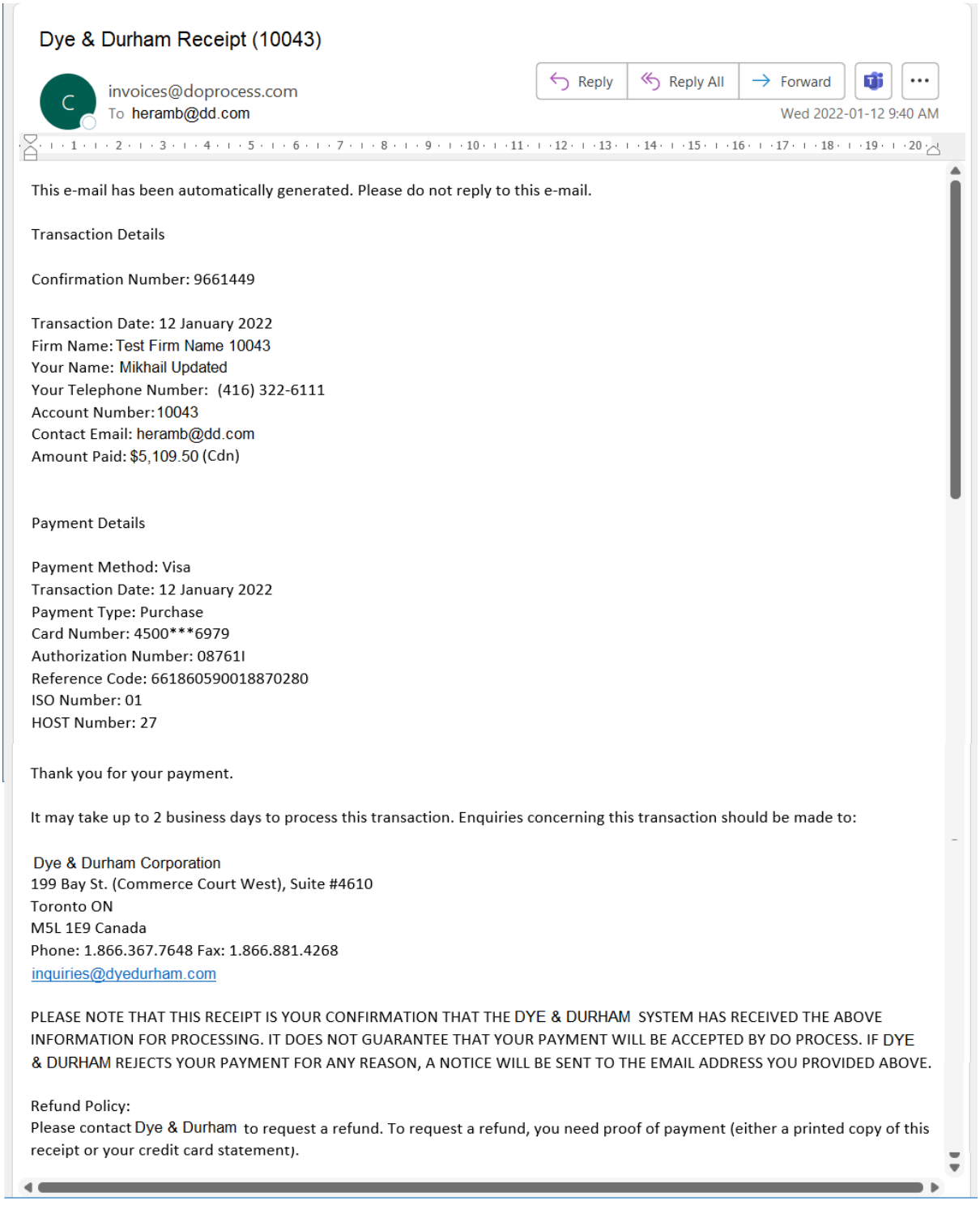
7 Select a card and click **Pay Invoice**.

8 A confirmation message appears that the payment has been made.



9 Click **OK** in the confirmation message.

10 The billing contact for your firm receives an email with the details of this transaction.



Dye & Durham Receipt (10043)

invoices@doprocess.com
To heramb@dd.com

Reply | Reply All | Forward

Wed 2022-01-12 9:40 AM

This e-mail has been automatically generated. Please do not reply to this e-mail.

Transaction Details

Confirmation Number: 9661449

Transaction Date: 12 January 2022
Firm Name: Test Firm Name 10043
Your Name: Mikhail Updated
Your Telephone Number: (416) 322-6111
Account Number: 10043
Contact Email: heramb@dd.com
Amount Paid: $5,109.50 (Cdn)

Payment Details

Payment Method: Visa
Transaction Date: 12 January 2022
Payment Type: Purchase
Card Number: 4500***6979
Authorization Number: 08761I
Reference Code: 661860590018870280
ISO Number: 01
HOST Number: 27

Thank you for your payment.

It may take up to 2 business days to process this transaction. Enquiries concerning this transaction should be made to:

Dye & Durham Corporation
199 Bay St. (Commerce Court West), Suite #4610
Toronto ON
M5L 1E9 Canada
Phone: 1.866.367.7648 Fax: 1.866.881.4268
inquiries@dyedurham.com

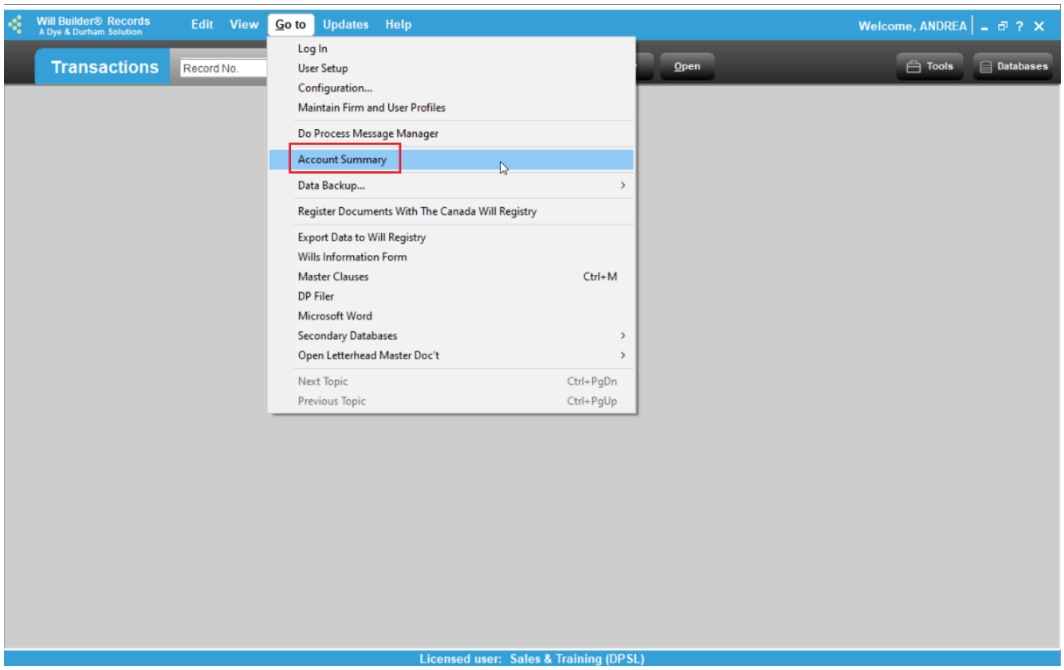
PLEASE NOTE THAT THIS RECEIPT IS YOUR CONFIRMATION THAT THE DYE & DURHAM SYSTEM HAS RECEIVED THE ABOVE INFORMATION FOR PROCESSING. IT DOES NOT GUARANTEE THAT YOUR PAYMENT WILL BE ACCEPTED BY DO PROCESS. IF DYE & DURHAM REJECTS YOUR PAYMENT FOR ANY REASON, A NOTICE WILL BE SENT TO THE EMAIL ADDRESS YOU PROVIDED ABOVE.

Refund Policy:
Please contact Dye & Durham to request a refund. To request a refund, you need proof of payment (either a printed copy of this receipt or your credit card statement).

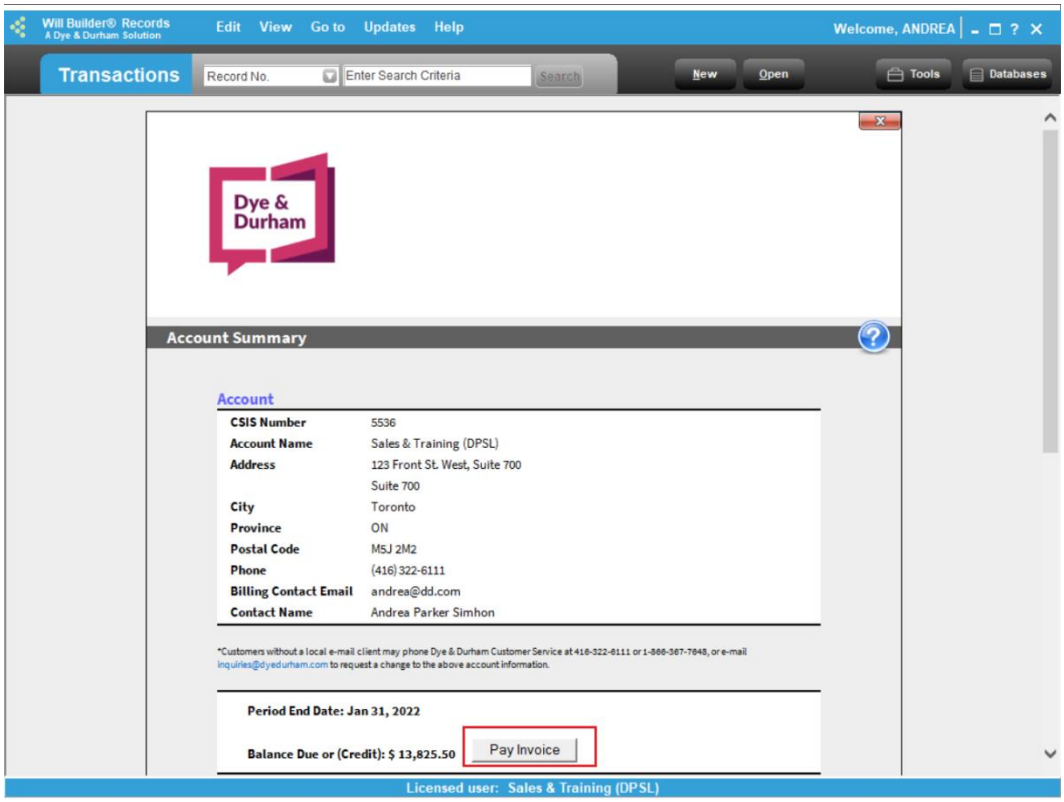
Note: After making this payment the balance will be refreshed in the **Account Summary** page in a couple of days.

4.2. ACCESSING THE PAY PAGE IN TC, FC, EAB OR WB

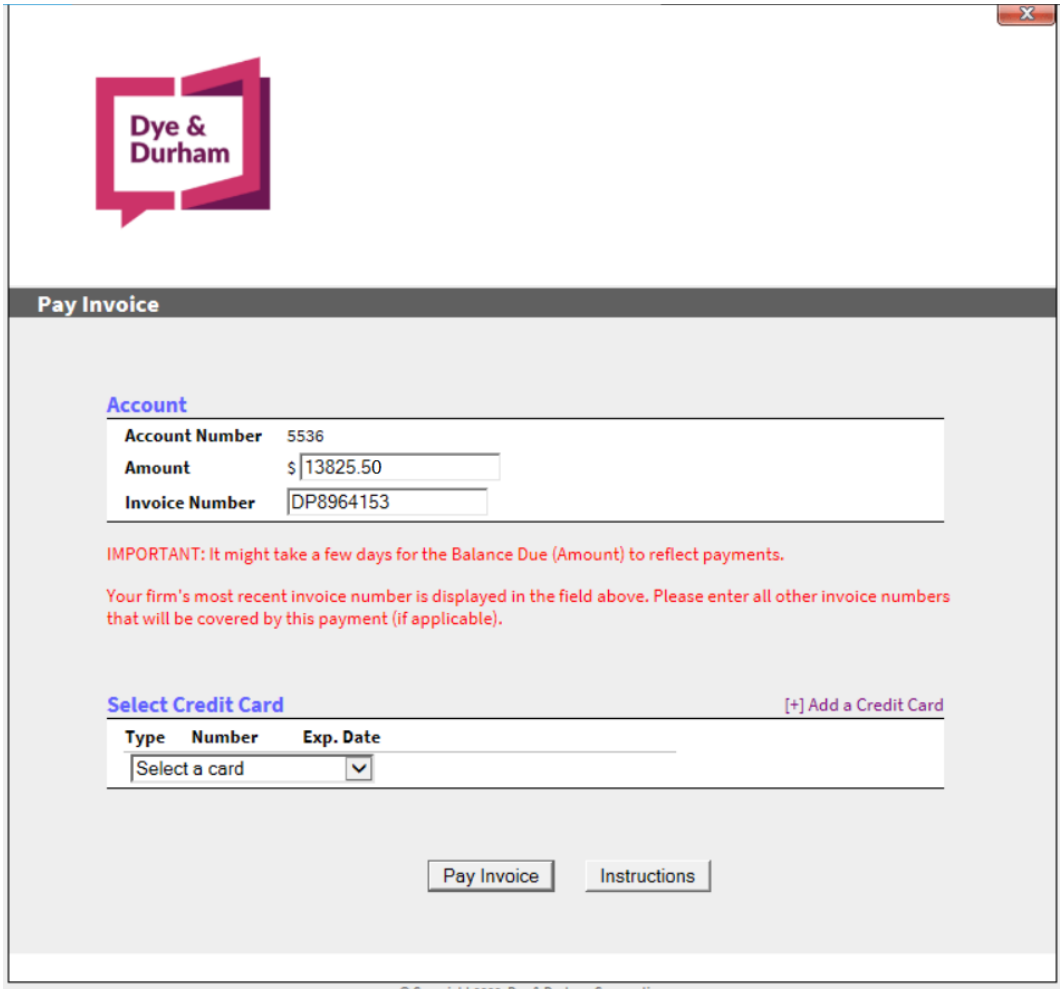
1 In **The Conveyancer**, **Fast Company**, **Estate-a-Base** or **Will Builder**, click the **Go To** menu > **Account Summary** or click **Tools** > **Account Summary**.



2 In the **Account Summary** page, click **Pay Invoice**.



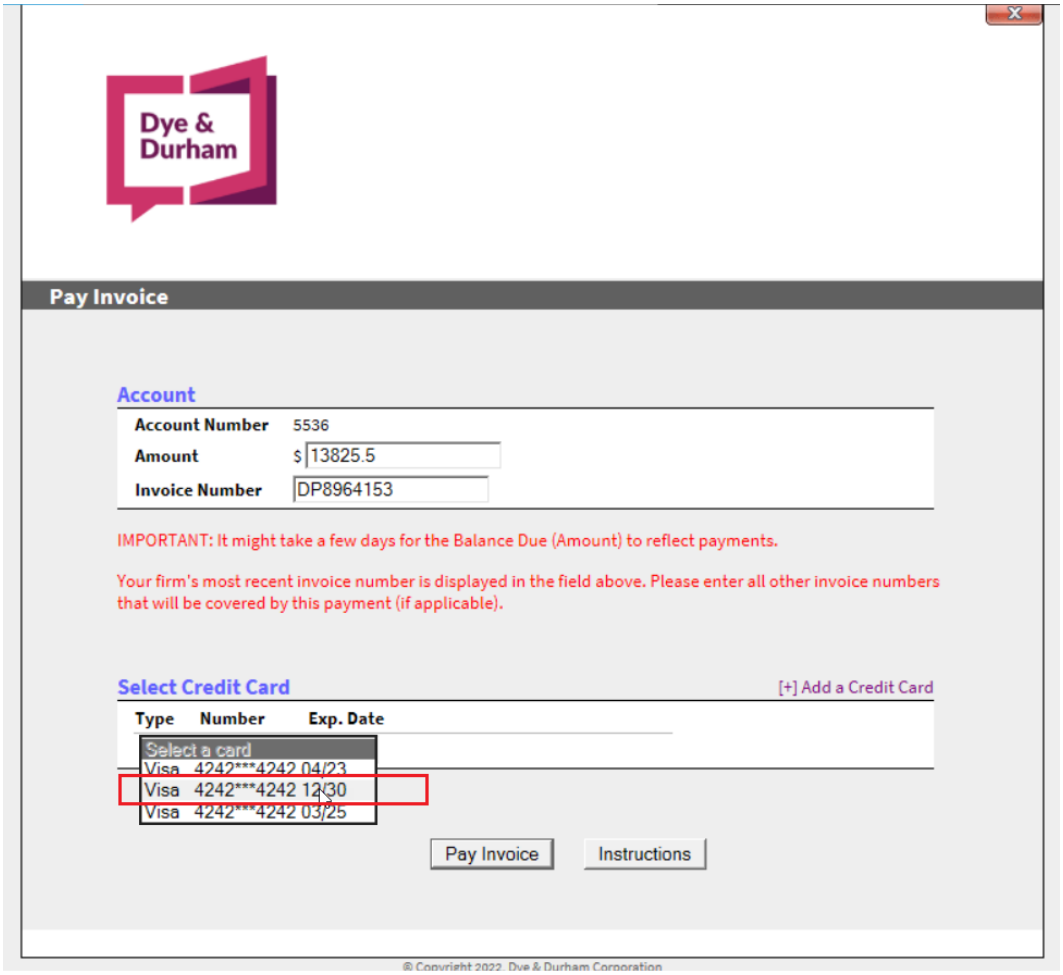
3 The **Pay Invoice** page appears in the **Account Summary** page.



4 In the **Amount** field, enter the required amount if it is not already appearing. **It is strongly recommended that you pay the entire balance.**

5 The last invoice number is automatically displayed. Enter all other invoice numbers that will be covered by this payment (optional).

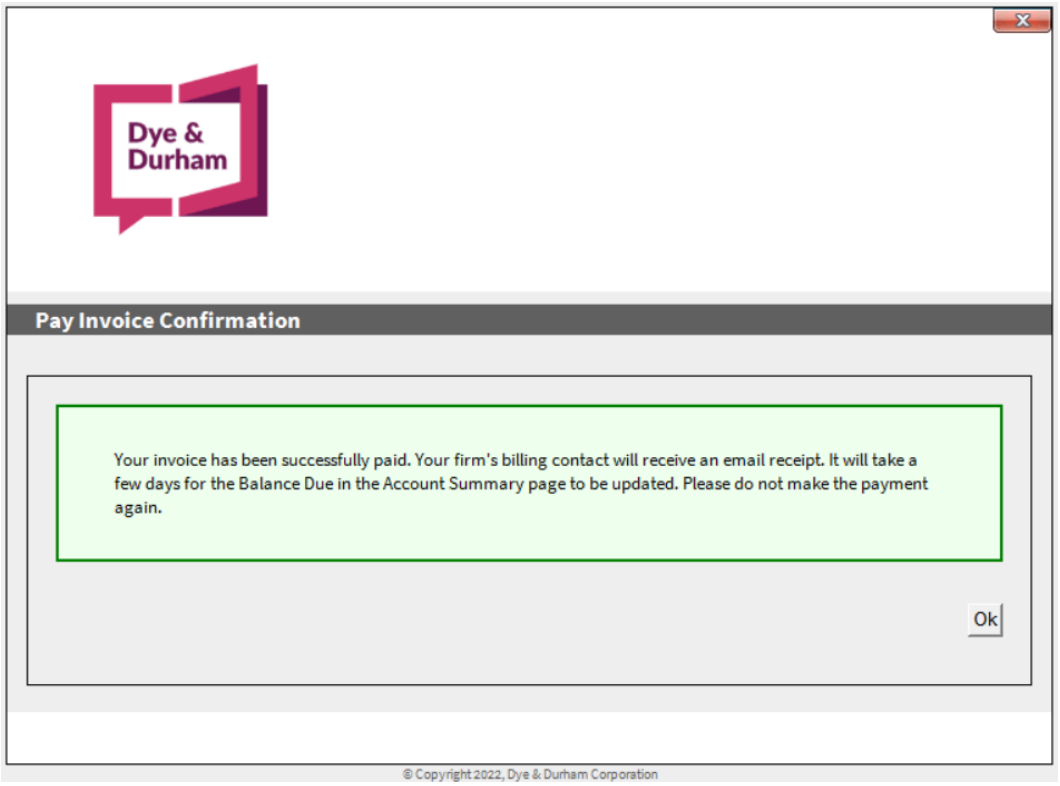
6 In the **Select Credit Card** section, click and select a card.



Note that the credit card type (Visa or Mastercard), masked number and expiry date appear for credit cards that have been added to the account. For instructions on adding a credit card, go to page 18.

7 Select a card and click **Pay Invoice**.

8 A confirmation message appears that the payment has been made.



9 Click **OK** in the confirmation message.

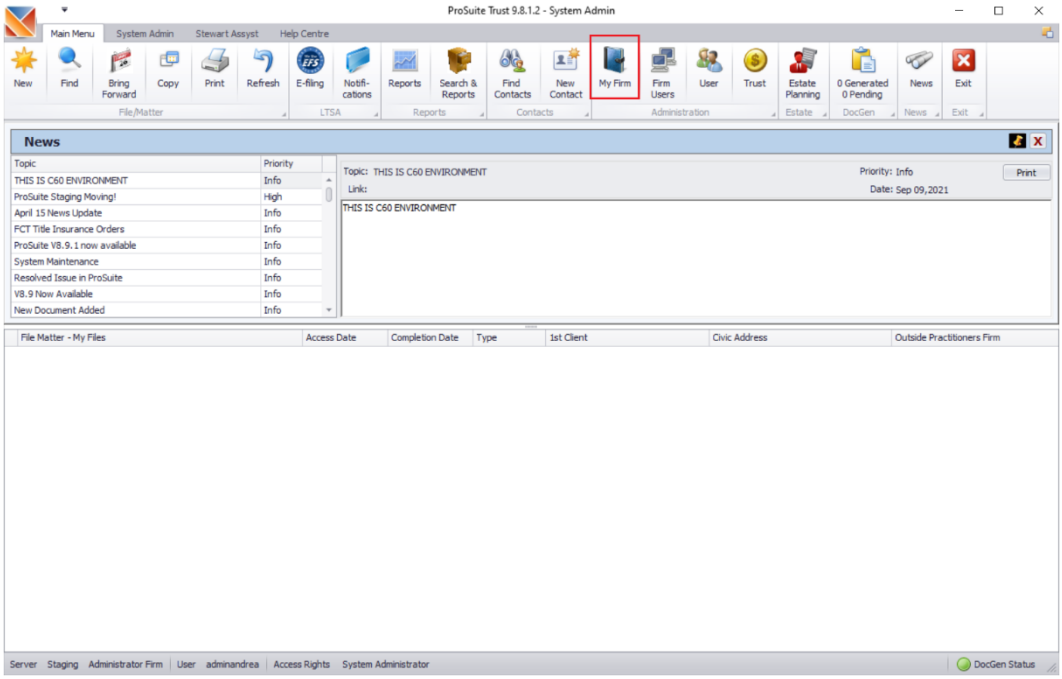
10 The billing contact for the firm receives an email with the details of this transaction. Refer to the sample email on page 9.

Note: After making this payment the balance will be refreshed in the **Account Summary** page in a couple of days.

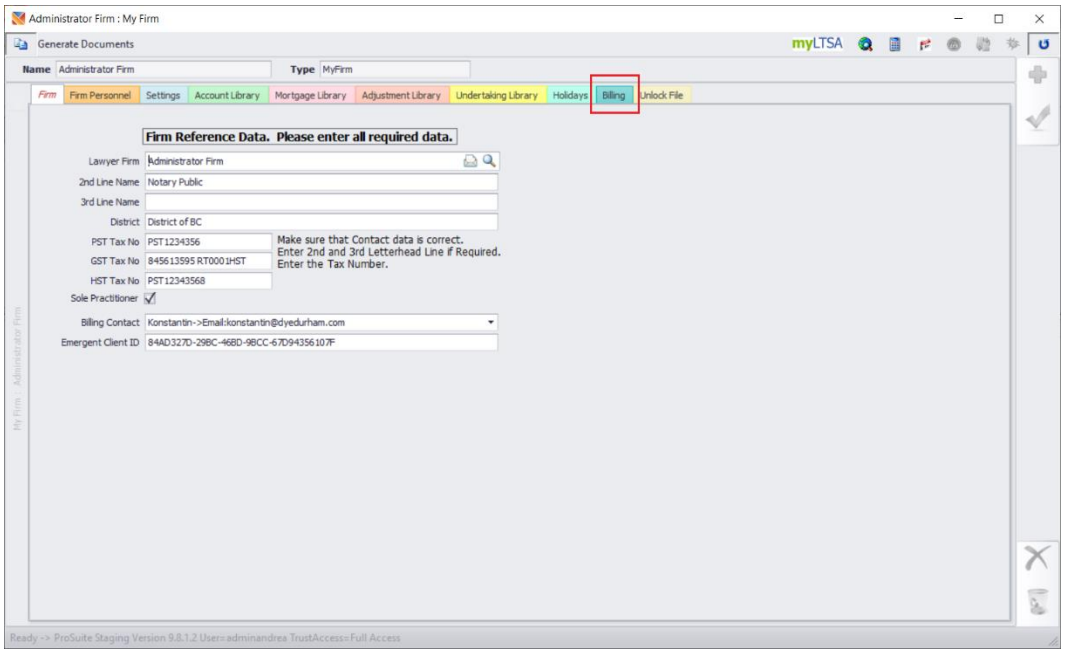
4.3. ACCESSING THE PAY PAGE IN PROSUITE

The Pay Page is available to Administrators only.

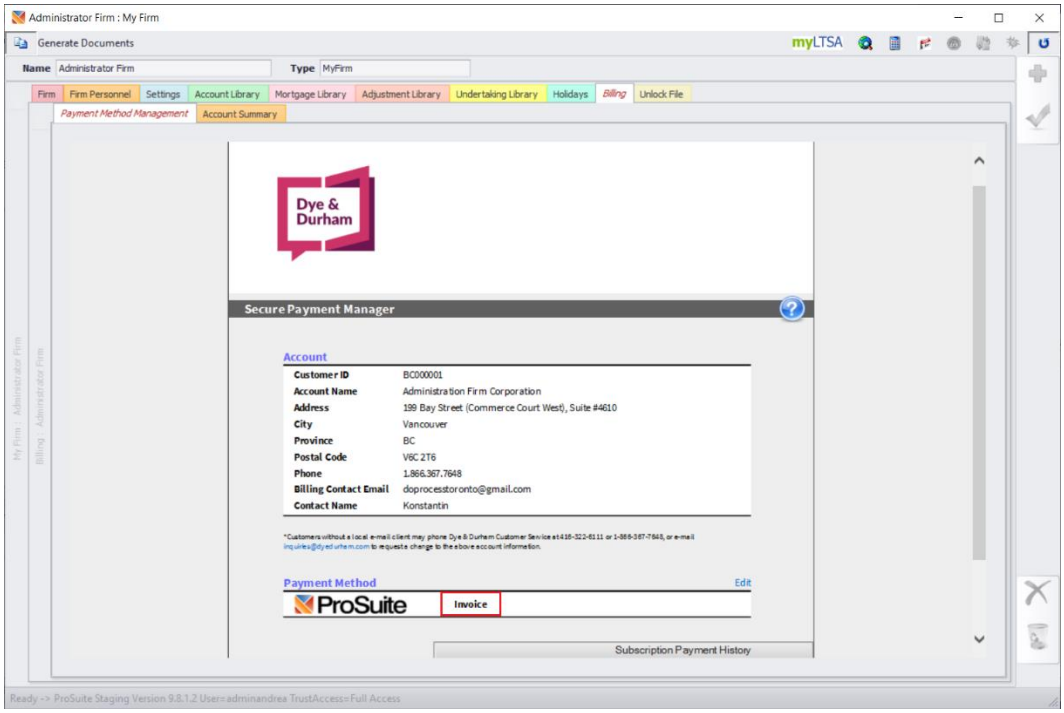
1 In the main ProSuite screen, click **My Firm**:



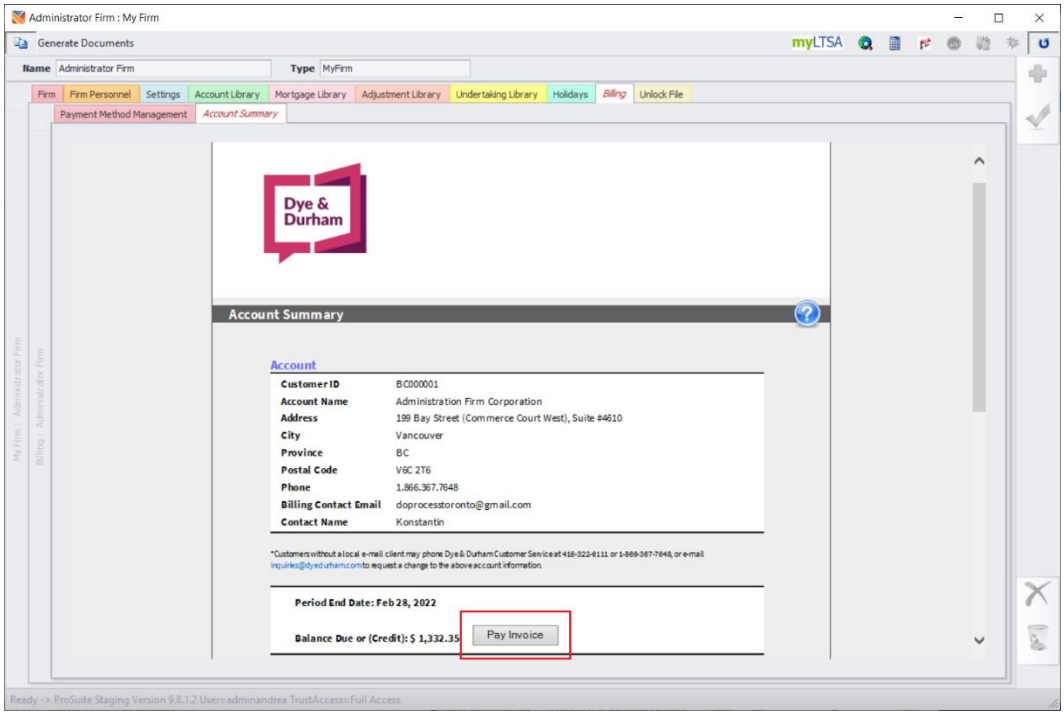
2 In the **My Firm** screen click **Billing**.



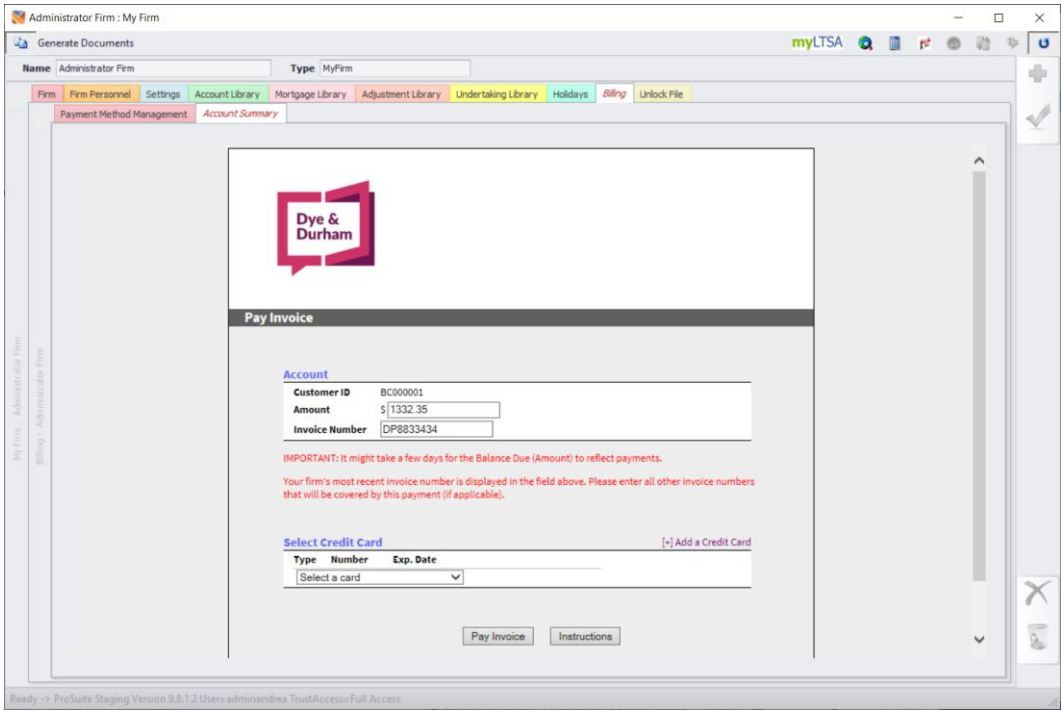
3 In the **Payment Method Management** screen, confirm that **Invoice** is selected for the payment method.



4 Click the **Account Summary** tab and click **Pay Invoice**:



5 The **Pay Invoice** page appears with the Customer ID, amount owing and invoice number:

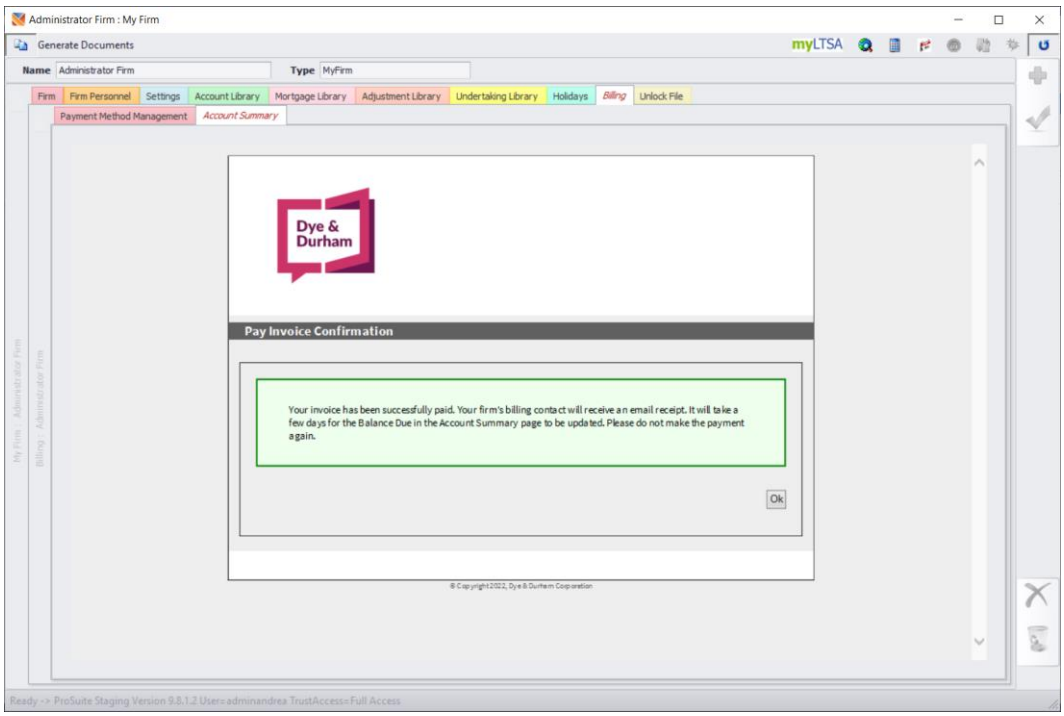


Note that the credit card type (Visa or Mastercard), masked number and expiry date appear for credit cards that have been added to the account. For instructions on adding a credit card, go to page 18. **It is strongly recommended that you pay the entire balance.**

6 The last invoice number is automatically displayed. Enter all other invoice numbers that will be covered by this payment (optional).

7 Select a card and click **Pay Invoice**.

8 A confirmation message appears that the payment has been made.



9 Click **OK** in the confirmation message.

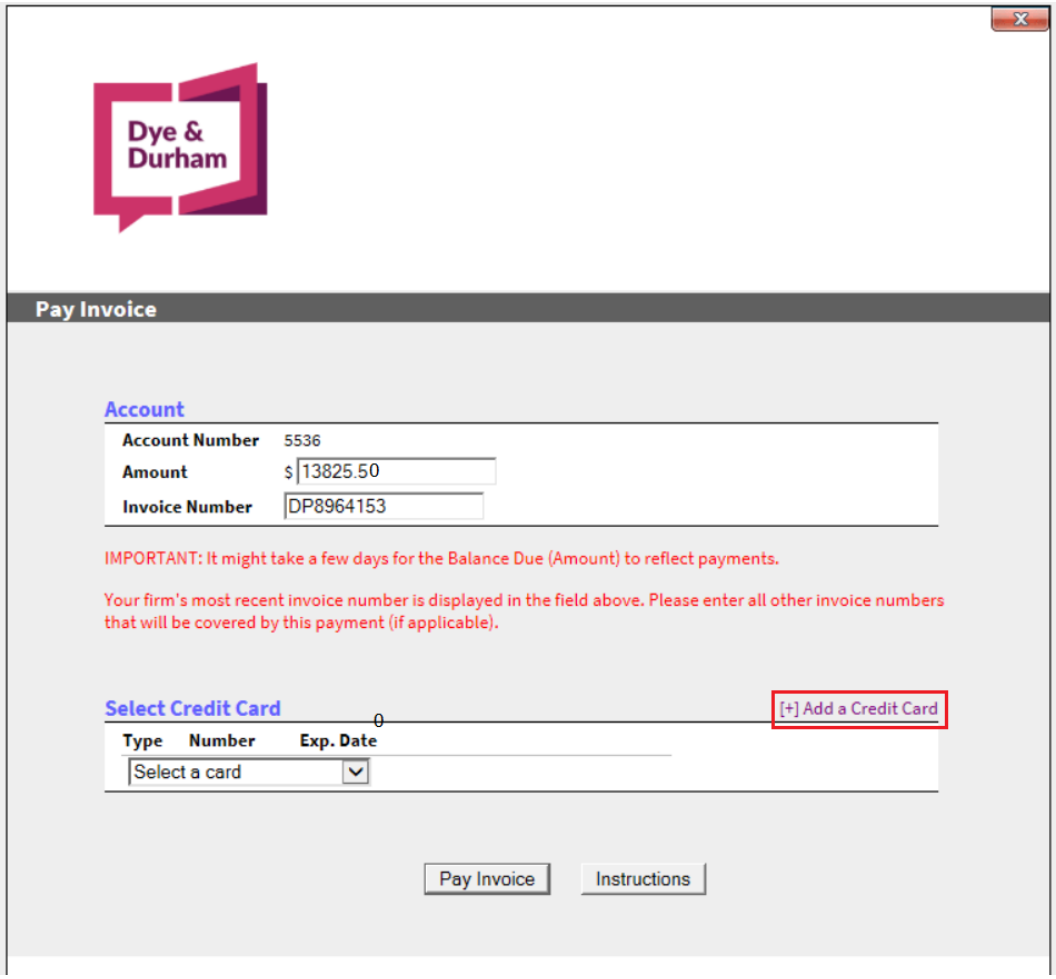
10 The billing contact for the firm receives an email with the details of this transaction. Refer to the sample email on page 9.

Note: After making this payment the balance will be refreshed in the **Account Summary** page in a couple of days.

5. ADDING A CREDIT CARD

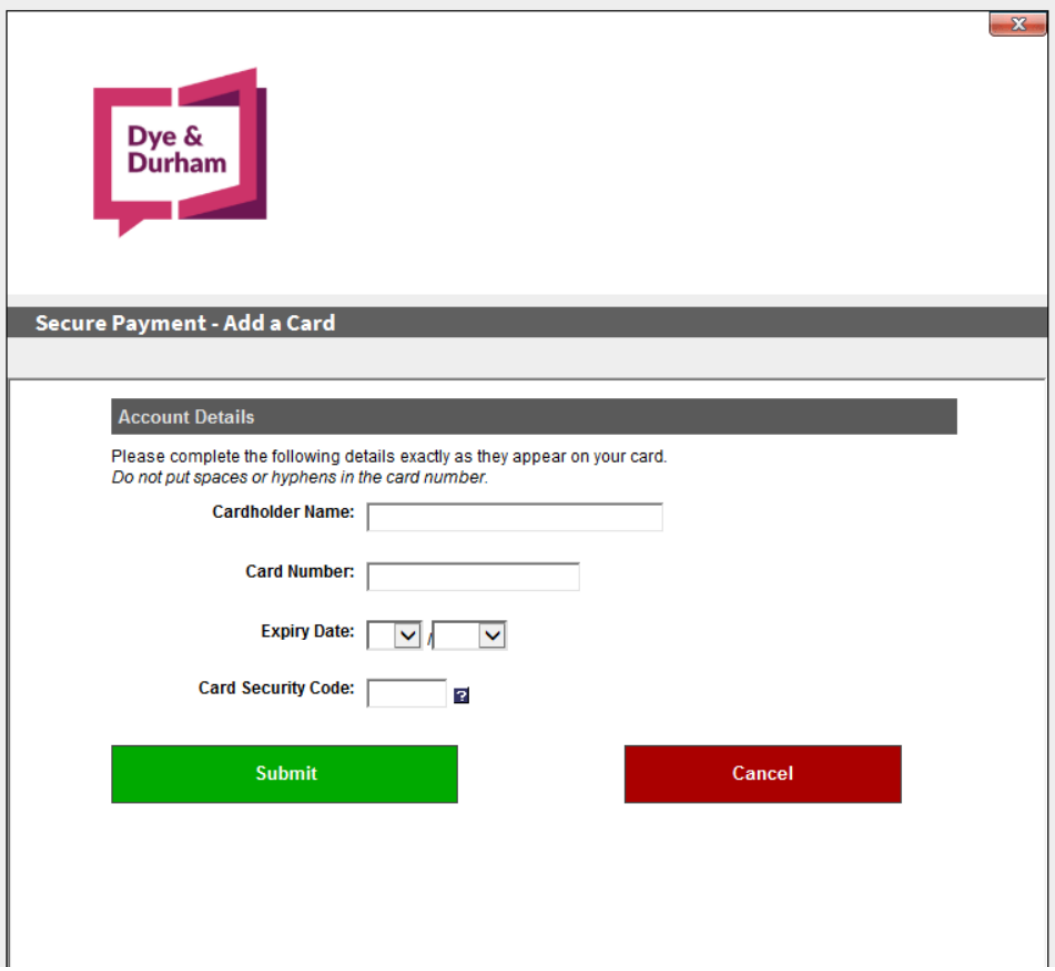
You can enter a valid credit card and then reuse it the next time you make an invoice payment. The following directions are the same for all Dye & Durham applications mentioned in this document:

1 In the **Pay Invoice** page, click **Add a Credit Card**.



2 In the **Secure Payment – Add a Card** page, enter the details as they appear on your credit card:

- Cardholder Name
- Card Number
- Expiry Date
- Card Security Code



3 Click **Submit**.

4 A confirmation message appears that your card has been successfully added.

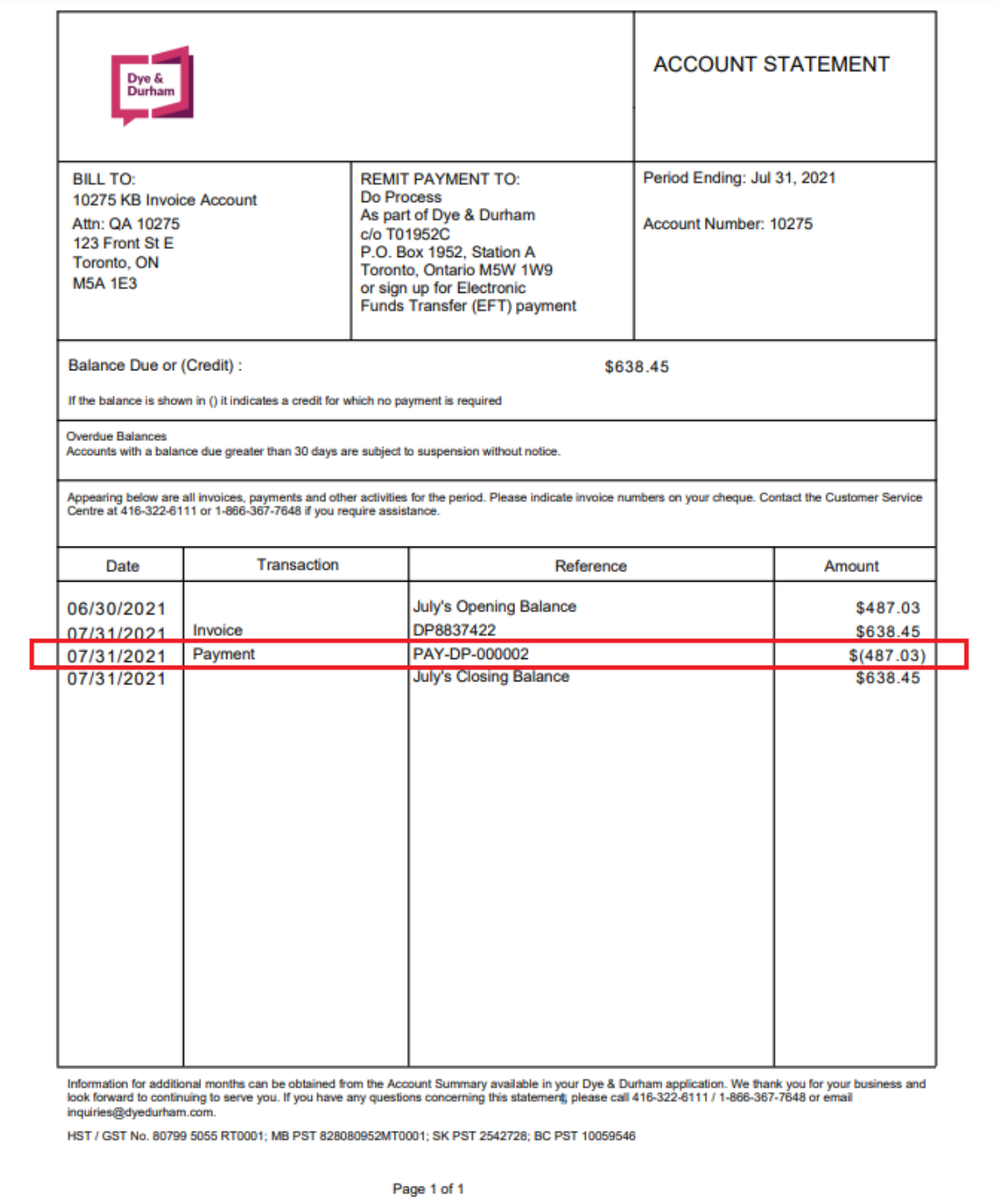
5 Click **OK** in the message.

6 The **Pay Invoice** page reappears. Select the required credit card from the list.

Note that as part of the secure management of the firm's credit card, the credit card is partially masked in the **Pay Invoice** page.

6. VIEWING INVOICE PAYMENTS IN ACCOUNT STATEMENT

On the 5th of every month a line appears in your firm's Account Statement for every Invoice by Credit Card Payment made in the past month. The Account Statement is emailed to your firm's billing contact (with the invoice) and is accessible in the **Account Summary** of your applications.



Dye & Durham

ACCOUNT STATEMENT

BILL TO:	REMIT PAYMENT TO:	Period Ending: Jul 31, 2021
10275 KB Invoice Account Attn: QA 10275 123 Front St E Toronto, ON M5A 1E3	Do Process As part of Dye & Durham c/o T01952C P.O. Box 1952, Station A Toronto, Ontario M5W 1W9 or sign up for Electronic Funds Transfer (EFT) payment	Account Number: 10275

Balance Due or (Credit) : $638.45

If the balance is shown in () it indicates a credit for which no payment is required

Overdue Balances
Accounts with a balance due greater than 30 days are subject to suspension without notice.

Appearing below are all invoices, payments and other activities for the period. Please indicate invoice numbers on your cheque. Contact the Customer Service Centre at 416-322-6111 or 1-866-367-7648 if you require assistance.

Date	Transaction	Reference	Amount
06/30/2021		July's Opening Balance	$487.03
07/31/2021	Invoice	DP8837422	$638.45
07/31/2021	Payment	PAY-DP-000002	$(487.03)
07/31/2021		July's Closing Balance	$638.45

Information for additional months can be obtained from the Account Summary available in your Dye & Durham application. We thank you for your business and look forward to continuing to serve you. If you have any questions concerning this statement, please call 416-322-6111 / 1-866-367-7648 or email inquiries@dyedurham.com.

HST / GST No. 80799 5055 RT0001; MB PST 828080952MT0001; SK PST 2542728; BC PST 10059546

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