



Customer Invoice & Payment Portal Guide

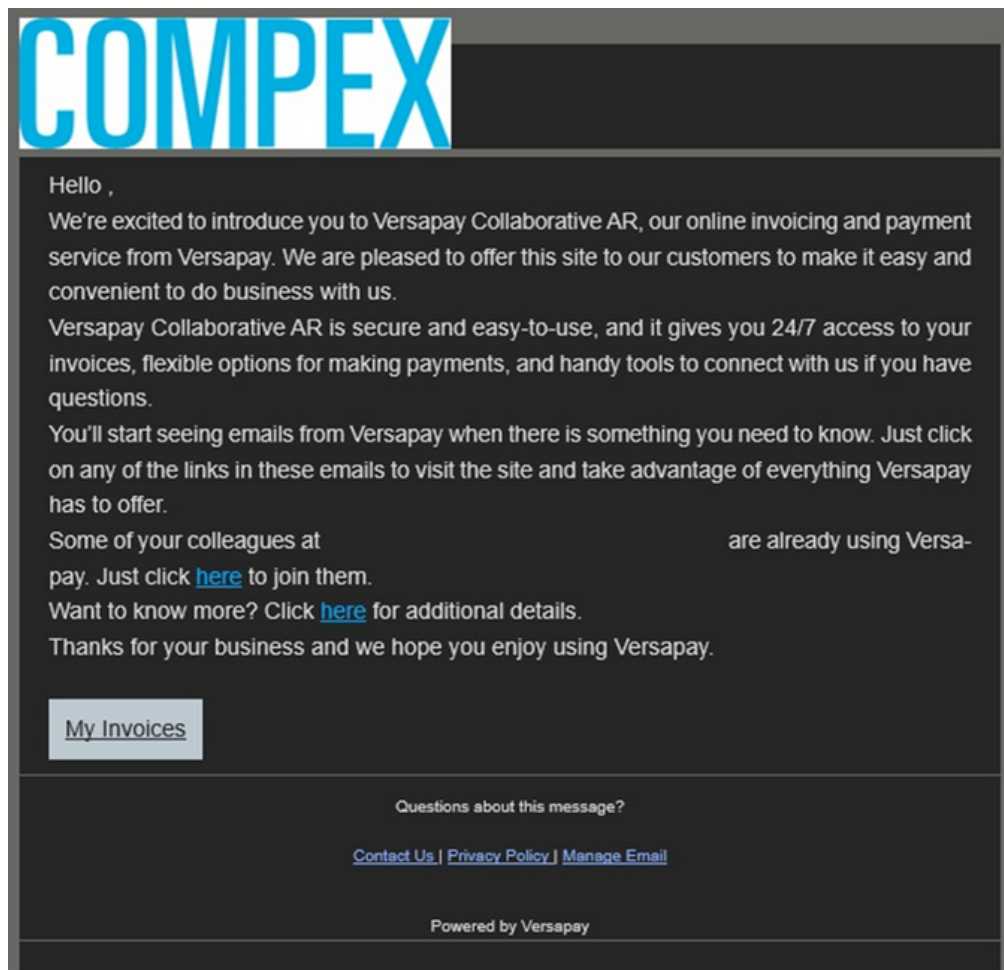
1. Overview

- Our Customer Invoice & Payment Portal allows you to:
- View, download and pay invoices online
- Store payment methods securely
- Set up AutoPay for recurring invoices
- Receive automatic notifications and updates

2. Accessing the Portal

Option 1: Via Invitation Email

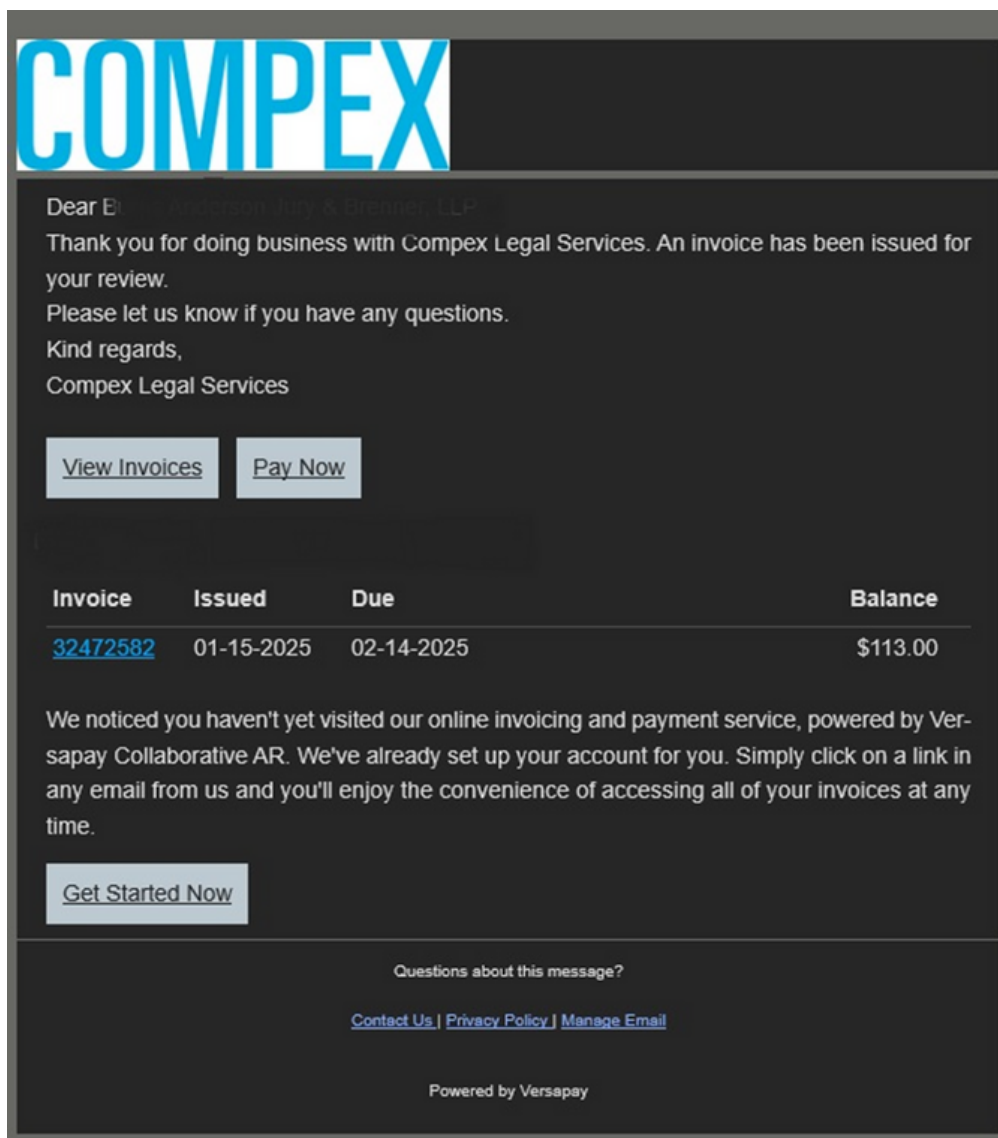
- Click the link in the email invitation from our Compex Legal Services Finance Team to accept the Terms and Conditions and create your account.



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Option 2: Via Invoice or Payment Notification

- Each time a new invoice is issued, you'll receive an email with a secure link to view and pay it directly in the portal.



3. Navigating the Portal

After logging in, use the menu bar at the top to move between sections:

- Invoices – View, download, or pay open invoices
- Payments – View your payment history
- Activities – View your invoice history
- Sign Up for AutoPay – Enroll your account with AutoPay (Credit Card/ACH)

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4. Viewing & Paying Invoices

To View Invoices

1. Go to **Invoices & Payments**.
2. Use filters (Open, Overdue, All, etc.) to find what you need.
3. Click the invoice number to view full details, attachments, or comments.

The screenshot shows the COMPEX web application interface. At the top, the COMPEX logo is on the left, and 'Switch Account' and '@compexlegal.com' are on the right. Below the header, a user profile section shows '(last login 14 minutes ago)' and 'Balance Due: \$0.00' with a note 'Last Payment: \$373.50 on 10-01-2025 (AutoPay)'. A navigation bar contains 'Invoices', 'Payments', 'Orders', and 'Activities', with 'AutoPay is ON' on the right. The main content area displays invoice #32472582 with a 'View PDF' button. Below the invoice number is a table with the following data:

AMOUNT:	INVOICE DATE:	DUE DATE:	STATUS:
\$113.00	01/15/2025	02/14/2025	Paid

Pay an Invoice

1. Select one or more invoices using the checkboxes.
2. Click **Pay** or **Pay All**.
3. Choose a **payment method** (bank account or credit card).
4. Click **Continue**, then **Complete Payment**.

Invoices	Payments	Orders	Activities	Sign Up for AutoPay
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Invoice # or PO #	...	Q
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Open Items	What should I pay?	Incentives	Scheduled Payments	More Options
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Dates:

All	Invoice Date	Due Date
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Pay All	Export ▼
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Pay	Mark for Payment	View PDF	1356 invoices, \$151,174.95 Owing / \$528,438.11 Total. 64 credits, (\$17,723.88) available / (\$17,731.17) Total.				
☐	INVOICE #	REFERENCE #	AMOUNT	STATUS	INVOICE DATE	DUE DATE	BALANCE
☒	24793083	ORDER:	\$166.62	OVERDUE	02-28-2019	03-30-2019	\$166.62
☒	24794039	ORDER:	\$666.63	OVERDUE	02-28-2019	03-30-2019	\$666.63
☒	24794044	ORDER:	\$445.77	OVERDUE	02-28-2019	03-30-2019	\$445.77

To Schedule a Payment

1. On the Ready to Pay page, choose **Pay on specified date**.
2. Select your preferred payment date and confirm.

💡 *Scheduled payments can be canceled but not edited.*

🏠 5. Adding or Managing Payment Methods

1. Go to **Payment Methods**.
 2. Click **Add New Payment Method**.
 3. Choose **Bank Account** or **Credit Card** and enter your details.
 4. Verify your account (for CAD or USD bank accounts):
 - CAD: Confirm a small deposit (under \$5) in your bank account.
 - USD: Verified automatically through the national database.
- 🔒 Verified accounts ensure smooth payments and prevent failed transactions.

My Profile

My Preferences

Company Profile

Payment Methods

My Notifications

Users

Add a card

Card information is stored securely and available for future payments.

* Card Number:

* CVV:

* Expires(MM/YY):

01 25

* Cardholder Name:

John A. Appleseed

Card Nickname:

John's Card

* Country:

United States

* State/Province:

* Zip/Postal:



Flip your card over and look at the signature box. You should see either the entire 16-digit card number or just the last four digits, followed by a special 3-digit code. This 3-digit code is your Card Verification Value.







accepted.

* Use this card for AutoPay

☐ Yes
 ☐ No

This account should be automatically debited: On Due Date

By choosing "Yes" above, I instruct Versapay and its financial service providers on behalf of Compex Legal Services to automatically debit this card to pay invoices that satisfy the criteria I have specified according to the timing indicated.

☐ I agree to allow Versapay and its financial service providers on behalf of Compex Legal Services to debit this card to pay invoices according to my instructions.

Add Card

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7. Setting Up AutoPay

To enable automatic payments:

1. Go to **Payment Methods**.
2. Add or select your preferred method.
3. Toggle **Use this account for AutoPay** to **Yes**.
4. Confirm your settings.

Note:

- AutoPay attempts payment once per invoice.
- If a payment fails (e.g., insufficient funds), you'll need to pay manually.
- Contact Compex if you need to disable AutoPay and the option isn't available.

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John's Card

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United States

* State/Province:

* Zip/Postal:

VISA

DISCOVER

MASTERCARD

accepted.

* Use this card for AutoPay

☐ Yes
 ☐ No

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8. Notifications & Preferences

To Manage Notifications

1. Click your name → **My Notifications**.
2. Check or uncheck boxes to subscribe or unsubscribe from alerts.
 -  Mandatory notifications cannot be turned off.
3. Click **Update Notifications** to save.

To Choose Default Landing Page or Language

1. Click your name → **My Preferences**.
2. Select your preferred **default page** (Invoices, Payments, etc.).
3. Choose your **language** (English, French, or Spanish).
4. Click **Update**.

9. Need Help?

If you experience issues signing in, contact us at mailboxcollections@compexlegal.com