# Dilltrust® Online Portal Enrollment Instructions





### To Get Started

Click on the link below to open the portal's login page:





On the login page, click on the **SIGN UP NOW** button located on the right side of the page



Make fast and secure payments online while reducing the cost and dealys of mailing paper checks



Access your account from your computer or mobile device 24/7 to make payments or view payment history



Streamline accounts payable by scheduling future payments or setting up Billtrust's autopay feature



Reduce manual entry by importing invoices directly into Quick-Books 8 other similar accounting programs



Customize how you receive your invoices & view your account information



Multiple users can register for the same Billtrust portal – no more sharing logins





# Enter Your Information

#### USER INFORMATION

- 1. In the popup window, enter your full name 8 email address
- 2. Create a user name 8 password

Your username can be anything, just be sure to choose something that's easy to remember

#### ACCOUNT INFORMATION

 Locate your account number and enrollment token on your latest invoice

Your account number is the number that precedes "0001" on your invoice

2. Enter your account number and enrollment token in the window's corresponding fields

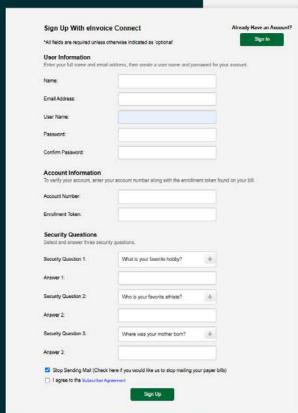
You can use your account number & enrollment token to create multiple accounts for your company's portal

\* If you don't see an enrollment token on your invoice, call 314-968-9366 or email

AR@roofersmartinc.com

## SECURITY QUESTIONS

- Select and answer three security questions from the drop-down menu
- Review and accept the subscriber agreement, then click SIGN UP at the bottom of the window







# Almost There

Within a few minutes, you should receive an \*email from the online portal confirming your account

Click on the confirmation link within the email to verify your identity and complete your registration

\*Your registration email will come from the Billtrust portal's email address: **RoofersMartInc@billtrust.com**. If you don't see it, check your spam folder.



# You're Ready

Your Billtrust online billing & payment account is ready for use

PLEASE NOTE Payments in the Billtrust system may take up to 48 hours to appear on your account

# We're here to help



Thank you for registering your Billtrust account. If you have any questions or need assistance, please contact our accounting team:

AR@roofersmartinc.com

314-968-9366





# **D** billtrust FAQ

Roofers Mart's Billtrust payment portal offers a convenient way to view and pay your invoices online. Below are some frequently asked questions that will help you better understand this service.

#### How does it work?

Billtrust provides you with a number of convenient capabilities. You can easily access your invoices and statements online in PDF format. You can also download your billing information into a variety of accounting packages like QuickBooks. And you can even help save a tree by opting out of receiving paper invoices.

#### How much does it cost?

This service is provided as a convenience to our customers at no additional charge. And because you won't need to spend time opening, sorting, filing and shredding paper documents, it will likely save you time and money.

#### Will my paper bills still be mailed to me?

By default you will not receive paper invoices. However, you can opt into our invoice mailing service though the **SETTINGS** tab within your payment portal.

#### Can I cancel after I sign up?

You may cancel your account at any time by calling Roofers Mart at 314-968-9366. If you cancel, you will begin receiving your invoices by mail.

#### Can I make a payment through Billtrust?

Yes. This service allows you to pay online with a bank account.

#### Can I cancel a payment?

Scheduled payments can be canceled prior to processing. To view all scheduled payments, click on the **PAYMENT HISTORY** tab within your portal. To cancel a payment, simply click the **CANCEL** button to the right of the scheduled payment.

#### Is my payment account information safe?

We protect your information with the highest level of encryption available. You can be assured that your information is safe. The website is PCI Level 1 Compliant and SSAE 16 Certified. They are the most stringent certifications to ensure your data is secure.

#### How will I know when I have a new bill?

You will receive a notification via email when a new bill is available.

#### Will my bills look the same online?

Your online bills will look identical to the paper bills you receive in the mail.

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#### Can I easily print and save my bills?

We use the industry-standard PDF format for storing and displaying billing documents, which makes it easy to print or save your bills on your computer. CLICK HERE TO GET THE FREE ACROSAT® READER®.

#### What's my User Name?

If you've upgraded from an earlier version of Billtrust, your User Name will be your Account Number. After signing in the first time, you will be prompted to create a new User Name that you'll use moving forward

#### Can I manage multiple accounts?

Yes. You can link multiple accounts through the **SETTINGS** tab. Once there, you should see an **ACCOUNT MANAGEMENT** section on the left navigation panel, which allows you to link multiple accounts by providing the necessary credentials to verify that you own the accounts. If you don't see this option, reach out to Roofers Mart for assistance with linking the accounts.

#### Can I see bills based on a specific date range?

You can set custom date-range filters by clicking on the drop down arrow next to the date column that you wish to filter. Select from a predefined list of days or define your own custom range to filter your bills.

#### How are my bills organized?

All new unpaid bills will be listed in the **OPEN** tab. Once you have made a payment in full against a bill, you can manually move it from the **OPEN** tab to the **CLOSED** tab. You can adjust your portal to automatically mark paid bills as closed by selecting that option under the **SETTINGS** tab.

#### Can I print or download multiple bills at one time?

Yes. Click the box next to each item then click either **PRINT** or **DOWNLOAD** to group those bills together for easy printing and downloading.

#### Can I download my bills into my accounting software?

If your accounting software is compatible with one of our available formats, you can import your bills directly into your accounting system. Within your Billtrust portal, check the boxes next to the bills you want to download, then click the **DOWNLOAD** button and follow the instructions. You'll be able to select among a variety of accounting packages including QuickBooks, Viewpoint, Forefront (from Dexter + Chaney), Peachtree, and Timberline. You can also download a CSV file, which is compatible with Microsoft Excel.

#### How can I sort the information I see in my payment portal?

You can sort the items displayed by clicking on the column title.

#### How can I search for a specific bill?

You can search for a specific bill by clicking on the drop down arrow next to the column from which you want to search, then entering your search criteria.

