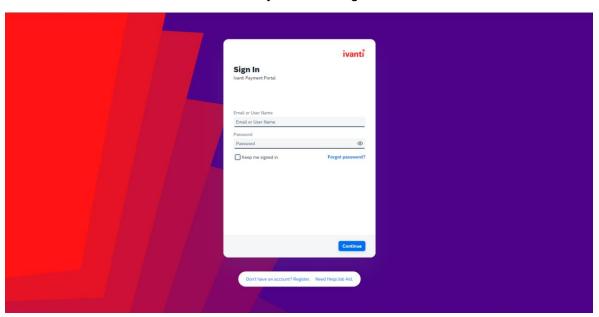# ivanti
Payment Portal Guide

Contents

I. Summary

This is a guide for Ivanti customers and their Accounts Receivables team responsible for moving their organization onto the Ivanti Payment Portal. This will improve payment flow by implementing the SAP Customer Cloud portal.

The implementation of the Ivanti Payment Portal and its automatic payment system will decrease processing time from one week to 24 hours.

Note on Credit Card payments: Anything over $10K will be charged a 2.7% fee.

II. Customer Login

Customers can login to make payments, View/download Invoices and Statements through the Ivanti Payment Portal at https://ivanti.com/customerportal. Information to access CCP has been included on Customers' invoices, monthly and dunning statements.
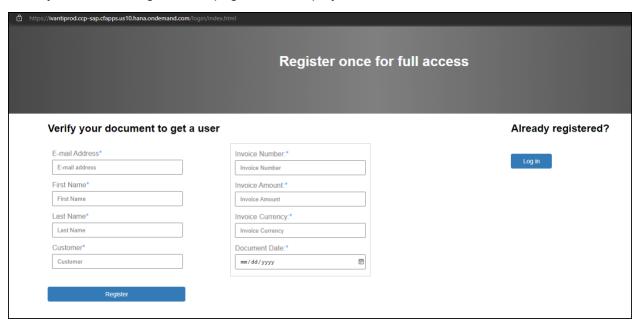

If you are accessing the portal for the first time or don't have the password to login, please click on Don't have an account? Register.
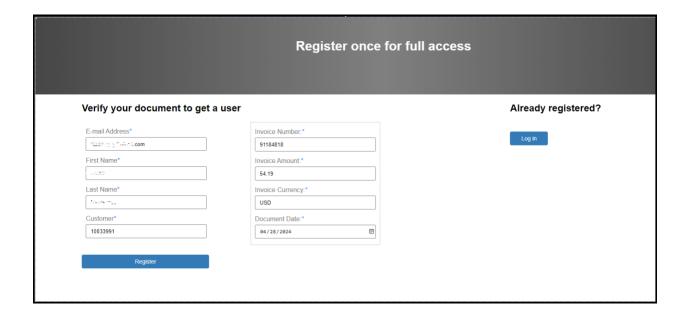
Register New account:

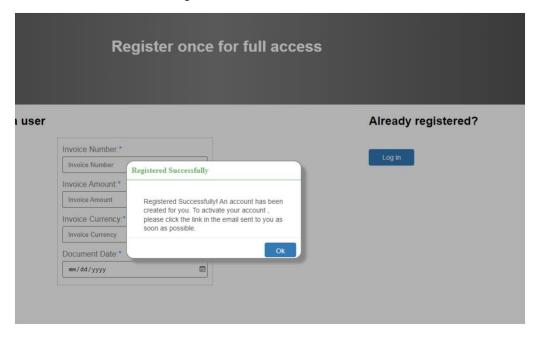Once you click on Register, the page below displays.

Enter Email address, First Name, Last Name, Customer Number and Latest Invoice number details to verify the Account and Register.

If an Invoice/Account is successfully validated, then an account activation email will be sent to the registered email address.
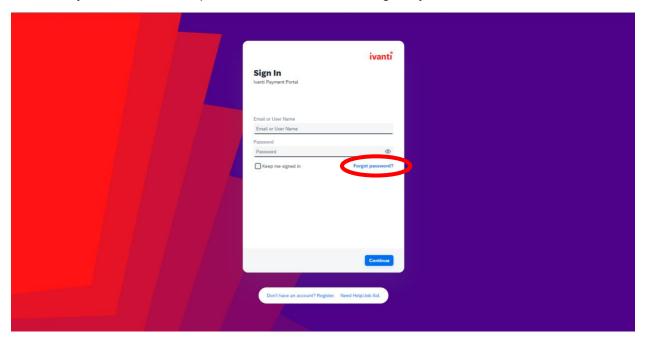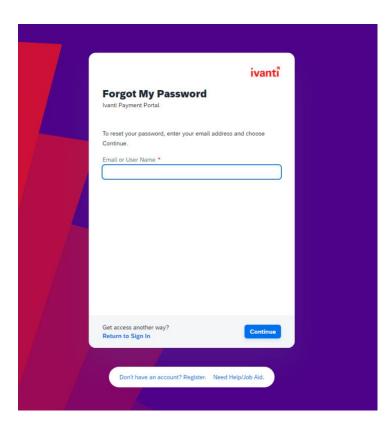

Click on the link to activate the account and Login with
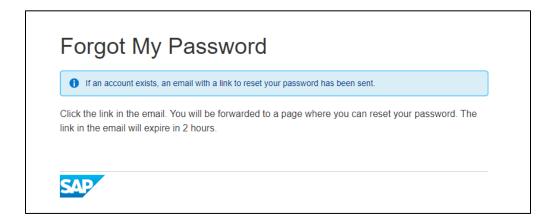User ID and Password to www.Ivanti.com/Customerportal.

If you have an account and don't remember the password, then click on Forgot password? and enter your contact email provided to Ivanti in the "Forgot My Password" screen.
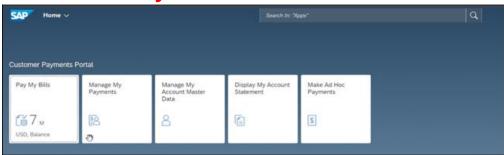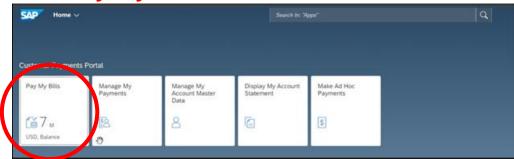
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Update the Password and access the Ivanti Payment Portal via www.ivanti.com/customerportal

III. Ivanti Payment Portal

After logging in via the link provided, the customer will gain access to the portal. This portal consists of five tiles, each representing a different application.
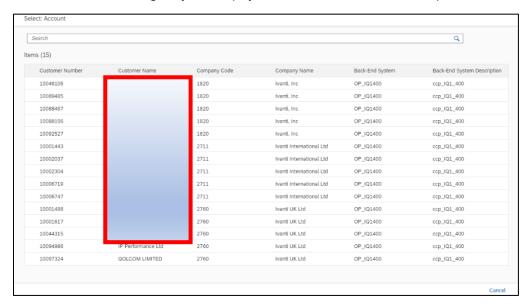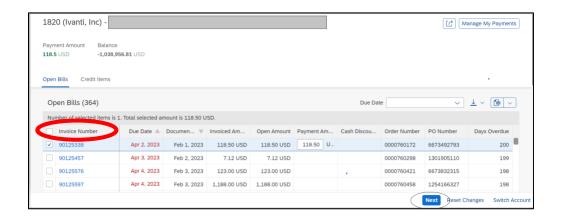
IV. Pay My Bills

This application allows customers to find and pay specific invoices and choose the method for payment (Credit Card or Bank Account).

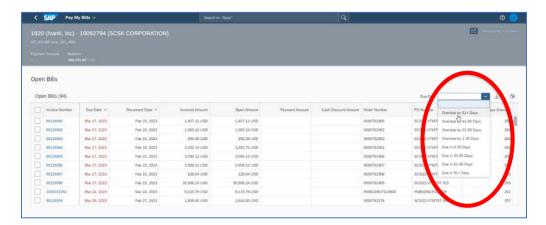Note: Ivanti is allowing only FULL payments for customers at this point.

1. Open/outstanding invoices are listed by Invoice Number
   a. Only accounts associated with the customer's organization will appear on the list.
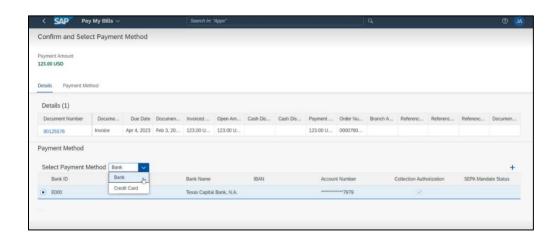
   b. Each line represents a separate invoice.

2. **Customer chooses Invoice Number to make payment on the Open Amount.**

3. **Customers can also search for Invoices by Due Date.**

4. **After selecting the specific Invoice (with checkmark), select Next.**
    Note: This data can be downloaded as a spreadsheet.
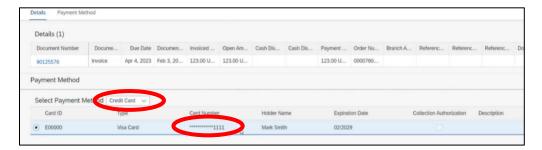

5. **Select a Payment Method**

6. **From this screen, the customer can choose the Payment Method (Credit Card or direct payment from bank/ACH).**
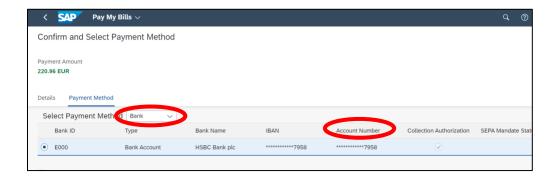   **Note: To update ACH information, reach out to Ivanti support.**
    (For U.S. support, email AR@Ivanti.com, international customers can contact credit@ivanti.com.)
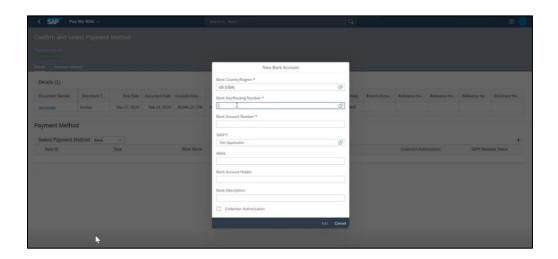
7. **If the Credit Card option is selected from the picklist, the customer's credit card information is retained (from the original registration).**

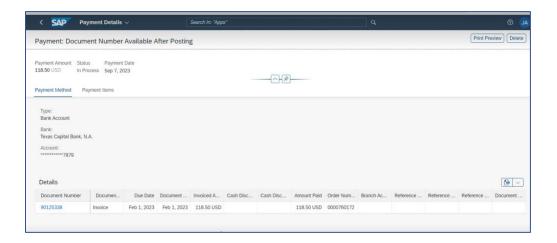8. **Similarly, if Bank has been selected, the Account information will be retained.**

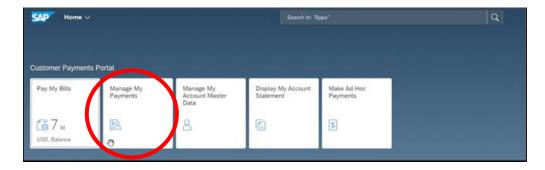9. **If new Credit Card needs to be added, customers can add it from the tile below.**

10. After confirming customers will see the below screen for Payment Details.
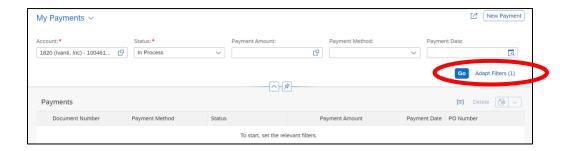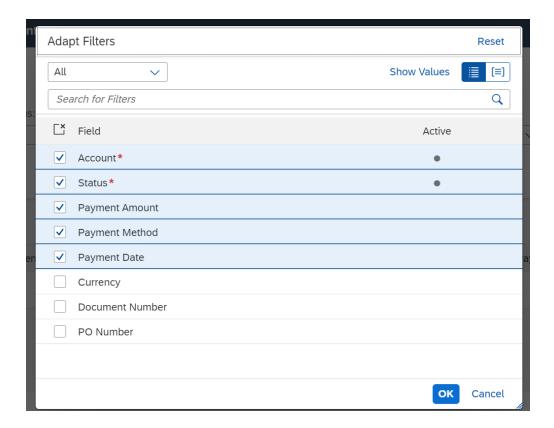
V. Manage My Payments

1. Payment details

2. **Once on the Manage My Payments tile, customers can search for payments associated to specific Accounts, Status, Amount, Payment Method and Date. They can also make a New Payment.**

3. **Customers have several filters available to locate an Account and/or Invoice.**

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Adapt Filters
Reset

All ▾

Show Values

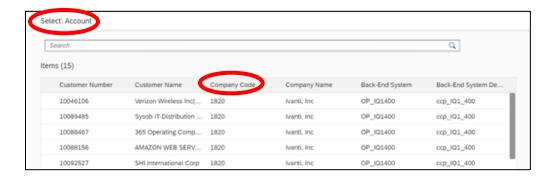| Field	Active
☑ Account *	●
☑ Status *	●
☑ Payment Amount	
☑ Payment Method	
☑ Payment Date	
☐ Currency	
☐ Document Number	
☐ PO Number	

OK   Cancel

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4. **All Accounts associated with the respective Company Code will appear on this list.**
5. **Select one of the Accounts listed to display Payment details.**

6. **Once the Account has been selected, the Payments made to this Account, including the Document Number, Payment Method, Status, Amount, Date and PO Number are visible.**
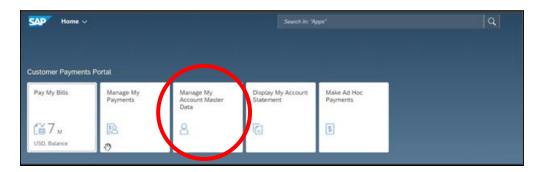
7. **Customers can click on a line item, which will open a window containing specific payment information.**

Payment: Document Number Available After Posting

Payment Amount	Status	Payment Date
189.63 USD	In Process	Oct 18, 2023

Payment Method   Payment Items

Type:
Visa Card

Card Number:
************4242

Holder Name:
Jack

Details

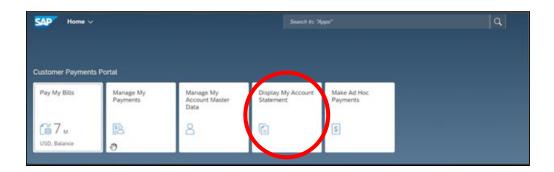# VI.   Manage My Account Master Data

From this tile/application, customers can manage their credit card information.

Note: To update any contact or banking information, reach out to Ivanti support. (For U.S. support, email AR@Ivanti.com, international customers can contact credit@ivanti.com.)

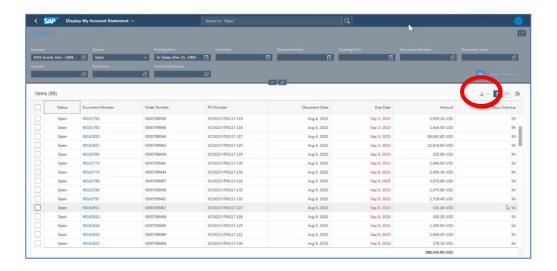**1.   Registered credit cards will appear on the screen (see below).**

CREDIT CARD							
Card ID	Type	Card Number	Holder Name	Expiration Date	Collection Authorization	Is Standard Card	Description
E00000	Visa Card	************1111	Mark Smith	02/2029	☐	◉	✕

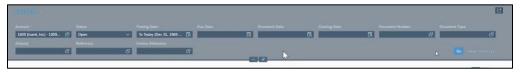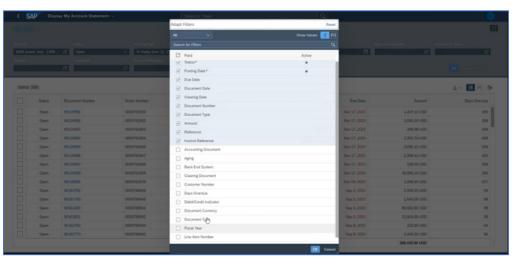# VII.   Display My Account Statement

1. **Display My Account Statement allows customers to view and download/export account data.**
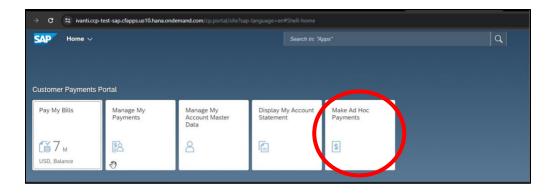

2. **While the filters above are defaulted, other filters are also available for customers to analyze their data (see below).**
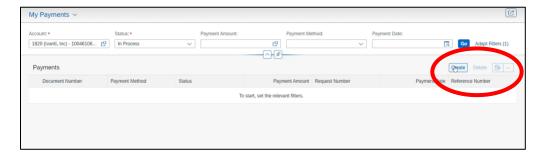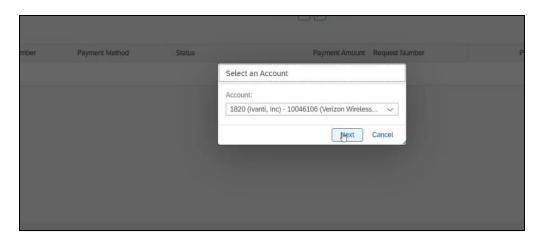
VIII. Make Ad Hoc Payments

Note: Customers paying an Invoice should use Pay My Bills. Customers making pre-payments should use Make Ad Hoc Payments.
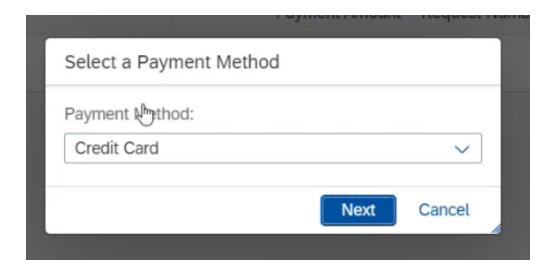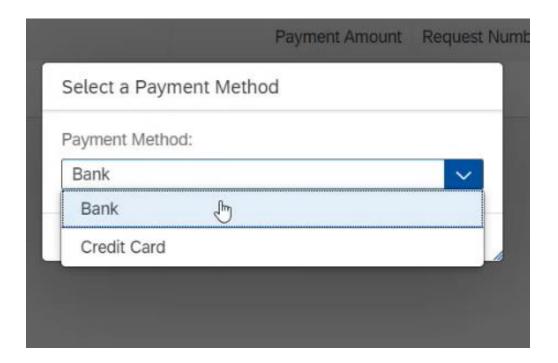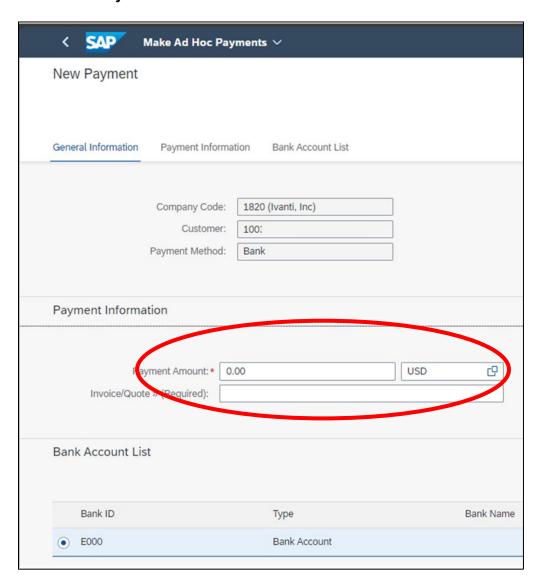
1. Select Create

2. Select Account

3.   **Select Payment Method (credit card or bank account).**

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4.   Add Payment Amount

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IX. Guided Tours

Note: Help is always available within the Ivanti Payment Portal.
The "?" in the upper right corner of the screen brings users to
"Guided Tours" of the portal components.