

Welcome to WisePay!

We've partnered with WisePay to make payments as simple as 1-2-3 (and it'll only take you as little as 10-15 minutes to activate)!

All invoices can be paid via Credit Card or Bank Account (DDR/ACH) and are settled by a secure and PCI-compliant platform for your utmost peace of mind.

With a WisePay account, you can:

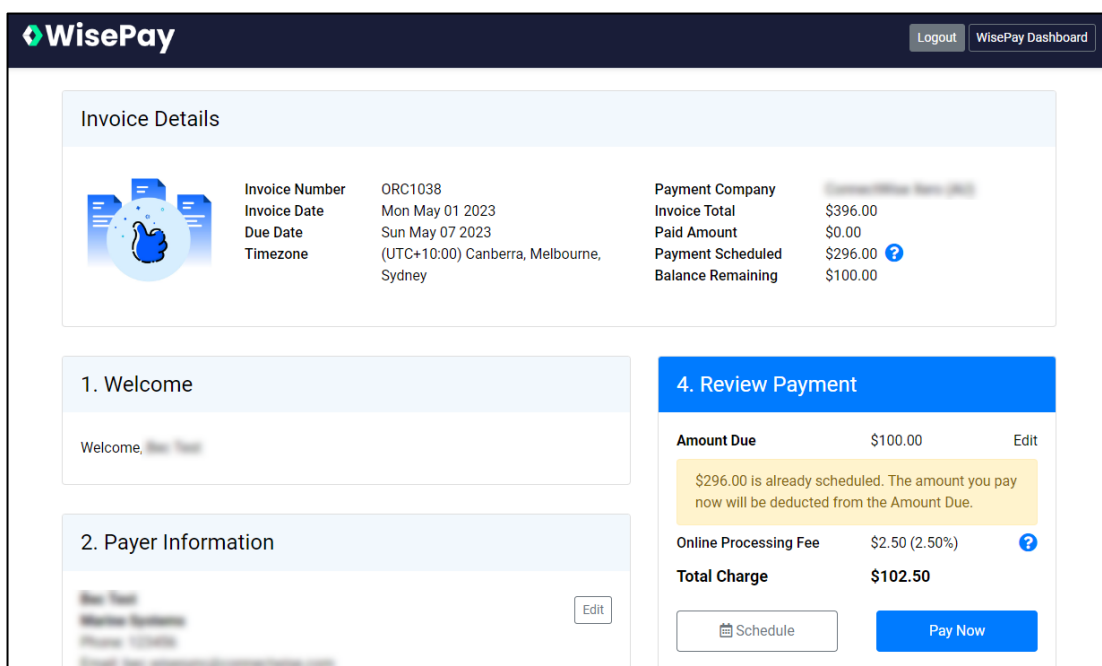
- View and download invoices.
- Securely store your preferred payment methods for ease of payment
- Easily pay for invoices using your securely stored Credit Card or Bank Account
- Set up Automatic Payments allowing you to 'set and forget'
- Schedule your invoices to be paid at a future date.

Get started at <https://secure2.wise-sync.com/Account/WisePayLogin>


How to pay an invoice

With WisePay, there are several ways an invoice can be paid:

- *Select 'Pay Now' button on an invoice:* This enables you to make a payment via credit card or bank account directly from an invoice, where you're provided the option to either pay in real-time or alternatively, to schedule payment at a future date.
- *Pay invoice directly in WisePay:* This enables you to make a payment via credit card or bank account in WisePay, where you're also provided the option to either pay in real-time or alternatively, to schedule payment at a future date.
- *Batch 'Pay Now':* This enables you to pay multiple invoices in bulk via credit card simply using the WisePay Outstanding Payment Actions > Batch Pay option.
- *Automatic Payments:* This allows for payments with authorization to be automatically processed from your nominated credit card or bank account.



The screenshot displays the WisePay dashboard interface. At the top, the 'WisePay' logo is on the left, and 'Logout' and 'WisePay Dashboard' links are on the right. The main content area is titled 'Invoice Details' and contains a table with the following information:

	Invoice Number	ORC1038	Payment Company	[Redacted]
	Invoice Date	Mon May 01 2023	Invoice Total	\$396.00
	Due Date	Sun May 07 2023	Paid Amount	\$0.00
	Timezone	(UTC+10:00) Canberra, Melbourne, Sydney	Payment Scheduled	\$296.00 ?
			Balance Remaining	\$100.00

Below the invoice details, there are two main sections: '1. Welcome' and '2. Payer Information'. The '1. Welcome' section shows a 'Welcome, [Name]' message. The '2. Payer Information' section shows a form with an 'Edit' button. On the right side, there is a '4. Review Payment' section with a blue header. It displays the following payment summary:

Amount Due	\$100.00	Edit
<p>\$296.00 is already scheduled. The amount you pay now will be deducted from the Amount Due.</p>		
Online Processing Fee	\$2.50 (2.50%)	? ?
Total Charge	\$102.50	

At the bottom of the '4. Review Payment' section, there are two buttons: 'Schedule' and 'Pay Now'.

STEP 1: Set up a new WisePay payer account (5 minutes)

Here are some simple steps to get your account up and running:

Look for the **Welcome to WisePay!** email

Please note: You can also self-register when paying an invoice via by simply selecting 'Create Payer Record.'

Create an account

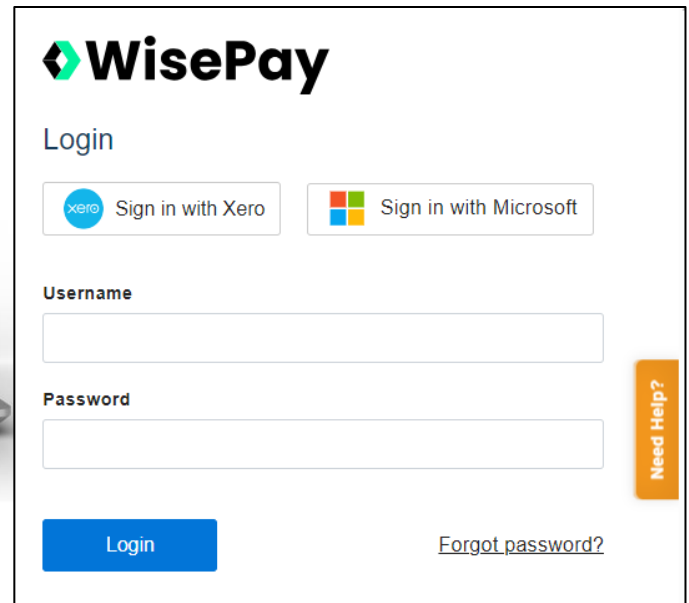
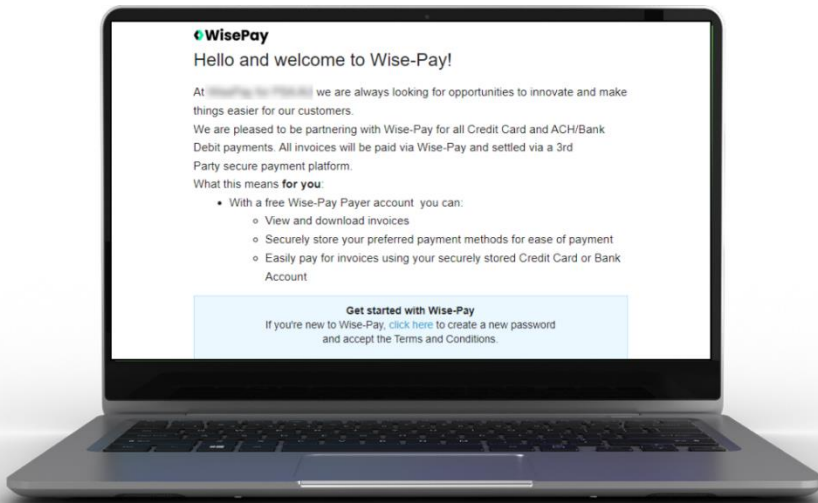
From the *Welcome to WisePay!* email, follow the [click here](#) link to set a password.

In the 'Create New Password' screen, enter, and confirm your password.

Confirm/Update your contact details.

Review and accept the 'I agree to the terms' checkbox and accept the Terms & Conditions.

Please note: Your WisePay Username is your email address.

The login page for WisePay. It features the WisePay logo at the top left. Below the logo is the heading 'Login'. There are two buttons for social login: 'Sign in with Xero' and 'Sign in with Microsoft'. Below these are two input fields: 'Username' and 'Password'. At the bottom left is a blue 'Login' button, and at the bottom right is a link for 'Forgot password?'. A vertical orange 'Need Help?' button is on the right side.

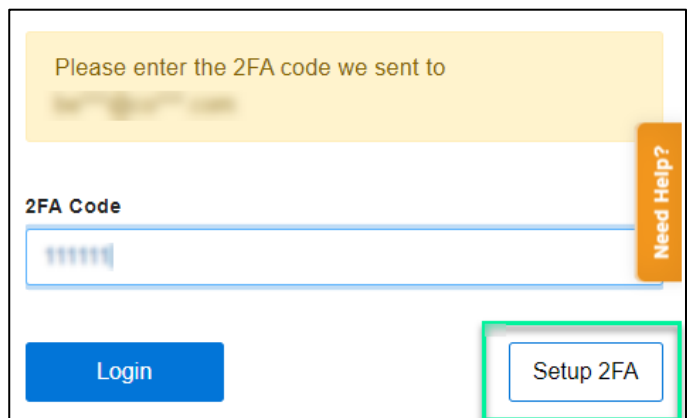
Two-Factor Authentication (2FA)

2FA provides an extra layer of security when authenticating your WisePay login.

This is a requirement for all WisePay users.

When you log in a 2FA code will be emailed to you.

From here, you may register using an authentication app on your mobile device (such as Microsoft Authenticator, Twilio Authy, or Google Authenticator) by clicking on the 'Setup 2FA' button after entering the emailed 2FA code.

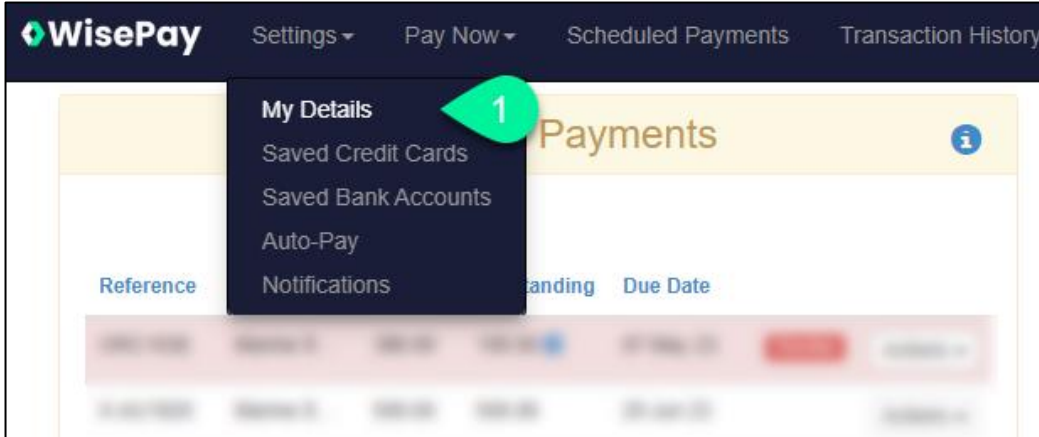
The 2FA verification screen. It has a yellow header with the text 'Please enter the 2FA code we sent to [redacted]'. Below this is a '2FA Code' input field. At the bottom left is a blue 'Login' button, and at the bottom right is a button labeled 'Setup 2FA' which is highlighted with a green border. A vertical orange 'Need Help?' button is on the right side.

Forgotten password?

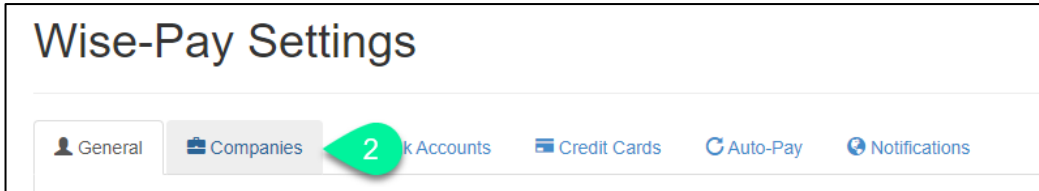
If you forget your password, this can be reset via the [Forgot password?](#) link on the login page.

STEP 2: Saving a payment method (Credit Card and/or Bank Account) (5 minutes)

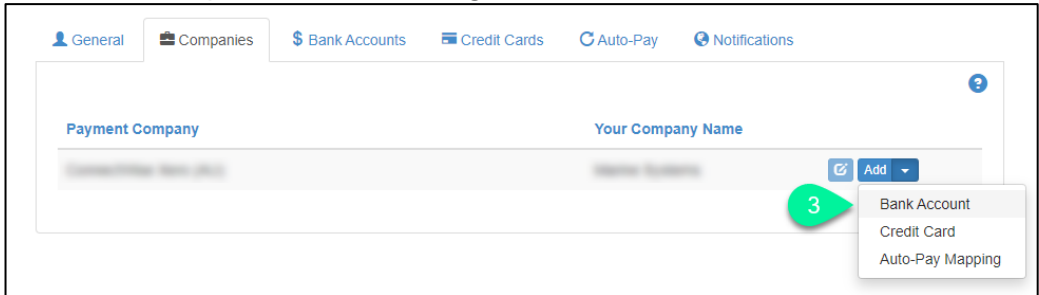
- Ensure you are logged into WisePay.



- From the top left toolbar, go to Settings > My Details
- Click on the 'Companies' tab



- Click on the dropdown icon to the righthand side of the 'Add' button



- Finally, select the payment method type you wish to save (Credit Card or Bank Account).
- Add your payment details.
Review and accept the Terms & Conditions.
- Click 'Save'.

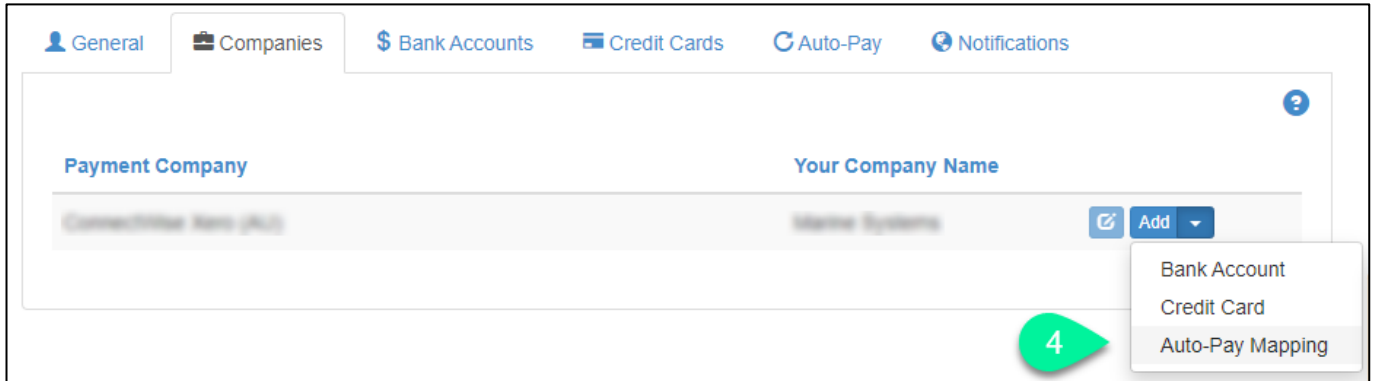
You may repeat these steps if you wish to save *both* a bank account *and* credit card.

STEP 3: Authorizing 'Automatic Payments' (5 minutes)

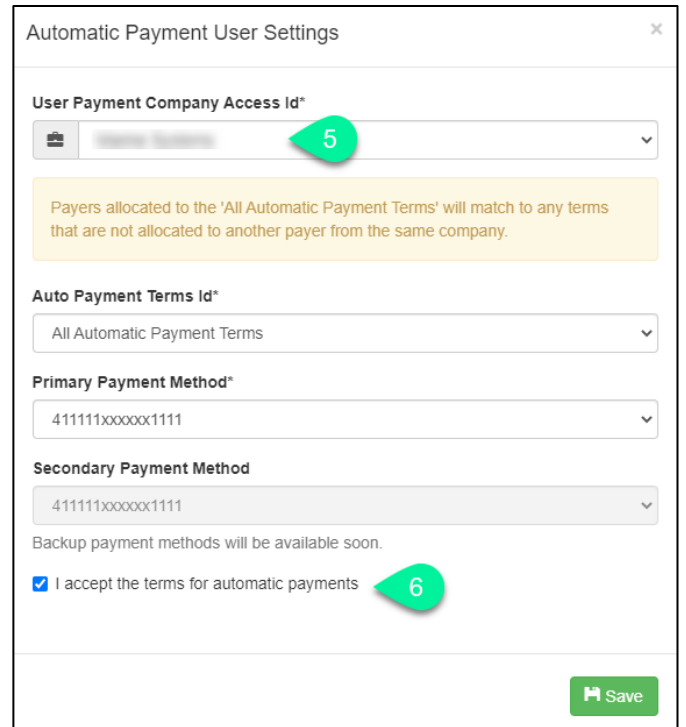
Automatic payments are recurring payments that are scheduled to be processed to your nominated Credit Card or Bank Account when due. This process eliminates manual transactions, thereby drastically reducing human error while saving you time and money through streamlined payment collection.

To configure Automatic Payments:

- Click on the 'Companies' tab.
- Click on the dropdown icon to the righthand side of the 'Add' button and select 'Auto-Pay Mapping.'



- Select your company from the 'User Payment Company Access ID' dropdown.
- Select your Primary Payment Method.
- Accept the Terms & Conditions.
- Click 'Save'.

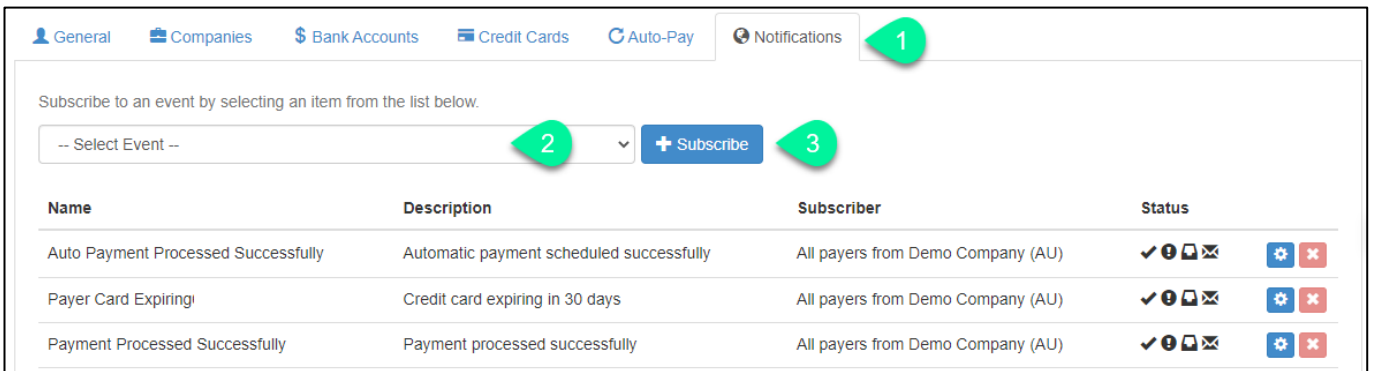


Email Notifications

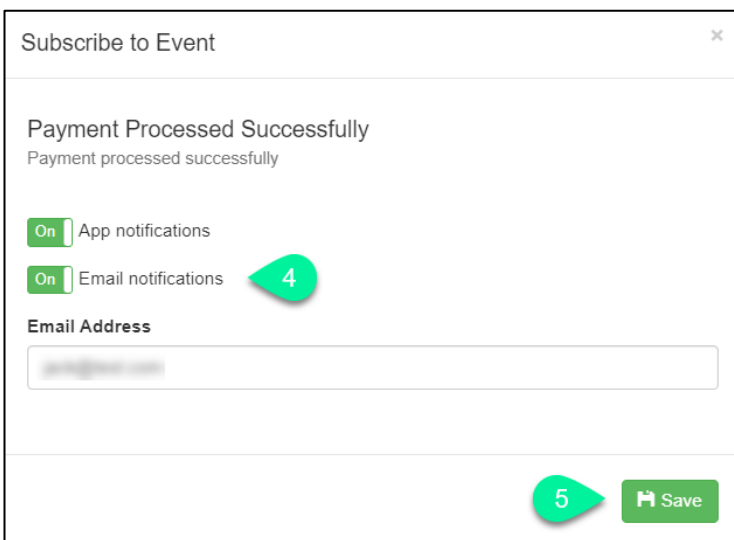
WisePay allows you to receive instant email or in-app notifications to inform you when a payment is either successful, scheduled, or failed. You can also receive alerts when a saved credit card is expiring or invoice overdue.

To review which notifications you are subscribed to, or to add additional notifications, simply:

- Click 'Settings'.
- Click 'Notifications'.
- Select the 'Event' you would like to receive notifications for.
- Click 'Subscribe'
- Choose your preferred method (app or email) for receiving notifications by setting the toggle.
- Finally, click 'Save'.



Name	Description	Subscriber	Status
Auto Payment Processed Successfully	Automatic payment scheduled successfully	All payers from Demo Company (AU)	✓🔔📧✉️ ⚙️ ✖️
Payer Card Expiring	Credit card expiring in 30 days	All payers from Demo Company (AU)	✓🔔📧✉️ ⚙️ ✖️
Payment Processed Successfully	Payment processed successfully	All payers from Demo Company (AU)	✓🔔📧✉️ ⚙️ ✖️



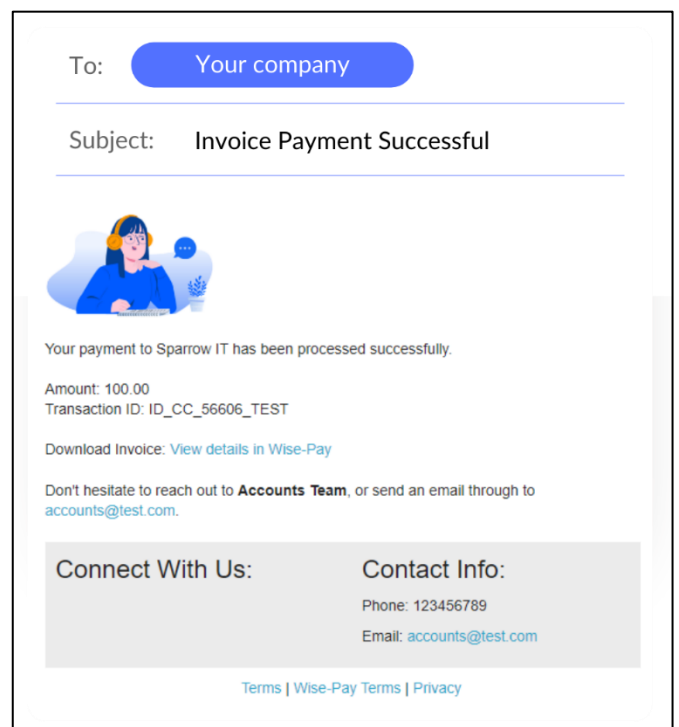
Subscribe to Event

Payment Processed Successfully
Payment processed successfully

App notifications


Email notifications

Email Address



To: **Your company**

Subject: **Invoice Payment Successful**



Your payment to Sparrow IT has been processed successfully.

Amount: 100.00
Transaction ID: ID_CC_56606_TEST

Download Invoice: [View details in Wise-Pay](#)

Don't hesitate to reach out to **Accounts Team**, or send an email through to accounts@test.com.

Connect With Us: **Contact Info:**
Phone: 123456789
Email: accounts@test.com

[Terms](#) | [Wise-Pay Terms](#) | [Privacy](#)

WisePay Home screen

Outstanding Payments:

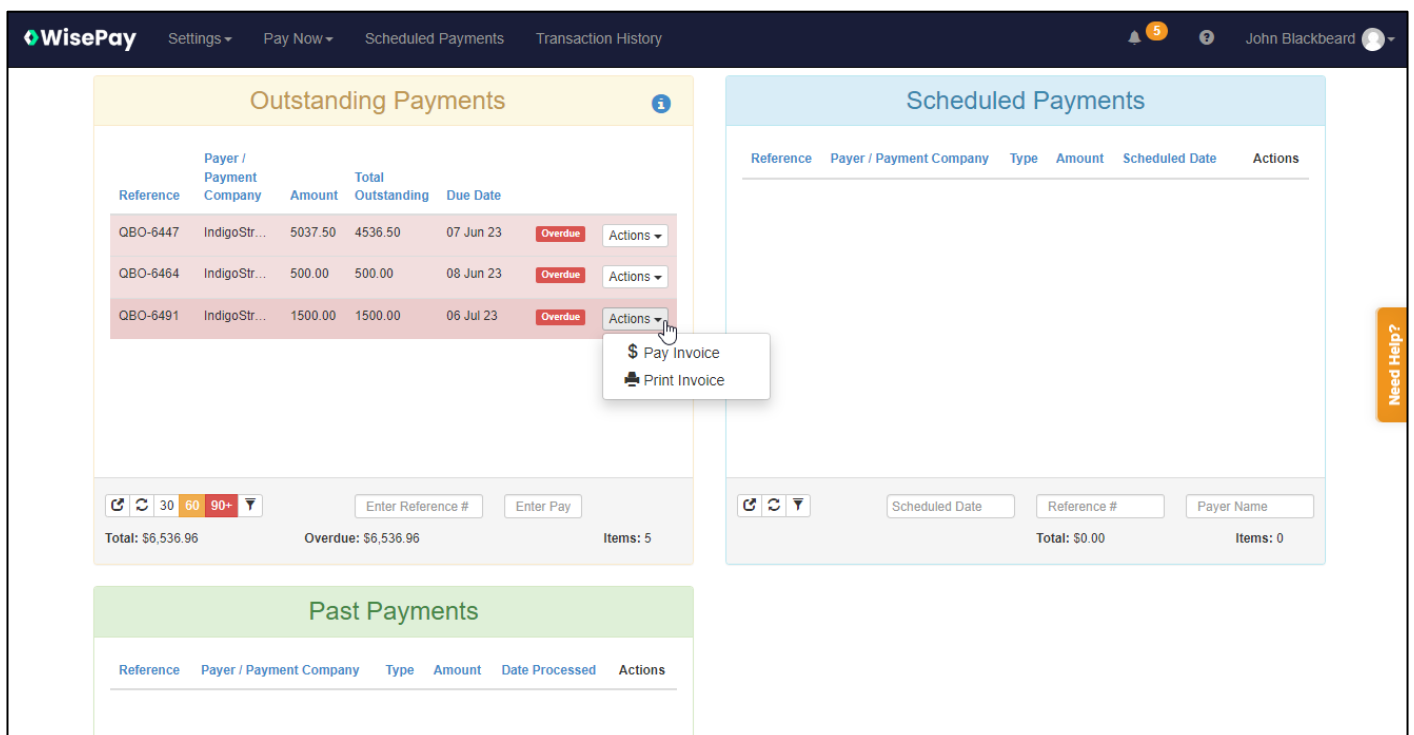
- Displays a list of all Outstanding Invoices for your company(s)
- Actions: you can pay the invoice or print it

Scheduled Payments:

- Display any Invoices that have been scheduled for a payment.

Past Payments:

- Displays all past payments which have been made via WisePay.
- Actions: you can print the invoice and the related surcharge invoice (if applicable)



The screenshot shows the WisePay Home screen with a dark blue header containing navigation links: Settings, Pay Now, Scheduled Payments, and Transaction History. The user's name, John Blackbeard, is visible in the top right corner. The main content area is divided into three sections:

- Outstanding Payments:** A table with columns: Reference, Payer / Payment Company, Amount, Total Outstanding, Due Date, and Actions. Three rows are shown, all marked as 'Overdue'. A dropdown menu for the 'Actions' column is open, showing 'Pay Invoice' and 'Print Invoice' options. Below the table, there are filters for 30, 60, and 90+ days, and input fields for 'Enter Reference #' and 'Enter Pay'. Summary statistics show a total of \$6,536.96, with \$6,536.96 overdue and 5 items.
- Scheduled Payments:** A table with columns: Reference, Payer / Payment Company, Type, Amount, Scheduled Date, and Actions. The table is currently empty. Below the table, there are input fields for 'Scheduled Date', 'Reference #', and 'Payer Name'. Summary statistics show a total of \$0.00 and 0 items.
- Past Payments:** A table with columns: Reference, Payer / Payment Company, Type, Amount, Date Processed, and Actions. The table is currently empty.

A vertical 'Need Help?' button is located on the right side of the screen.

Need more help?

Should you have any queries or need additional support using WisePay, please visit our dedicated Knowledge Base (<https://payersupport.wise-pay.com/support/home>) or directly contact the WisePay Payments team at support@wise-pay.com.