POOL360 PAY PROCESS

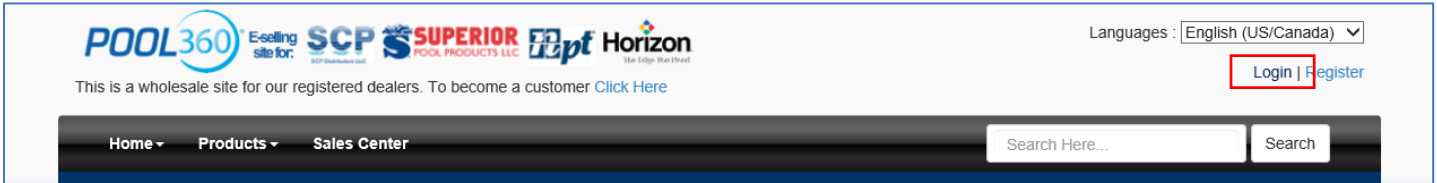## REGISTERING/VERIFYING YOUR POOL360 PAY ACCOUNT

REGISTERING

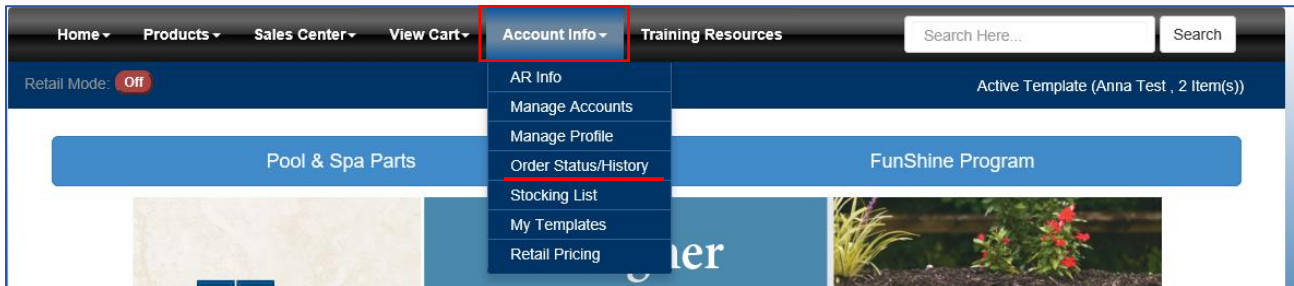1. To utilize POOL360 Pay, first log in to your POOL360 account.
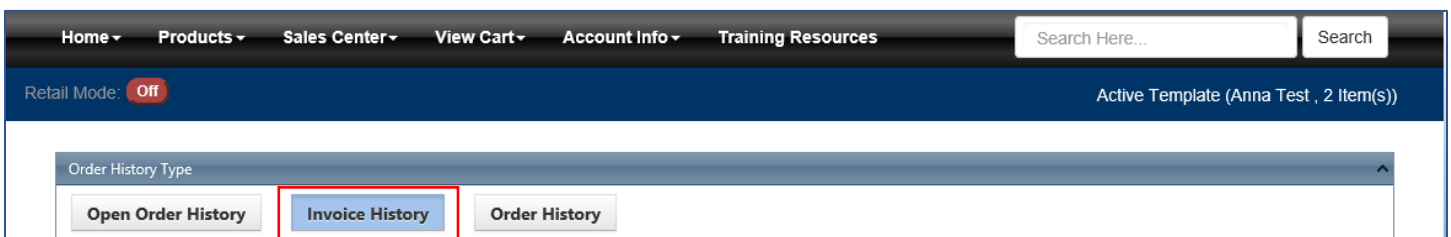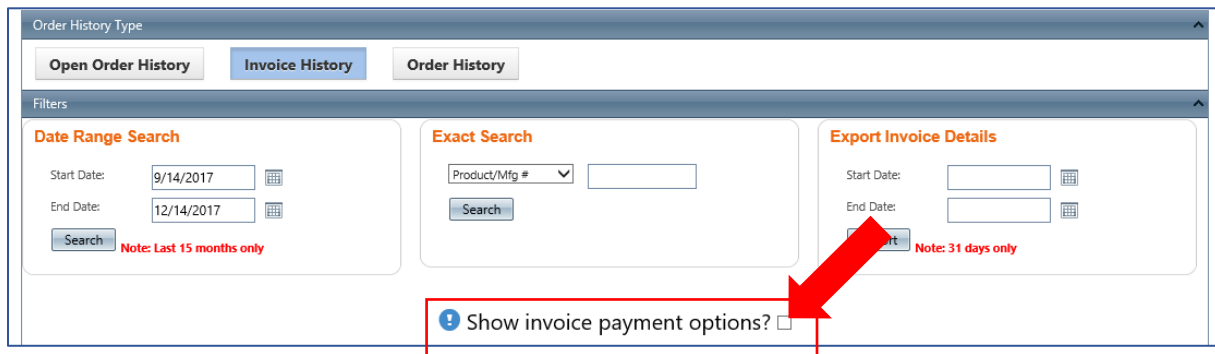

2. Once logged in, navigate to **Account Info** in the main menu and select **Order Status/History**
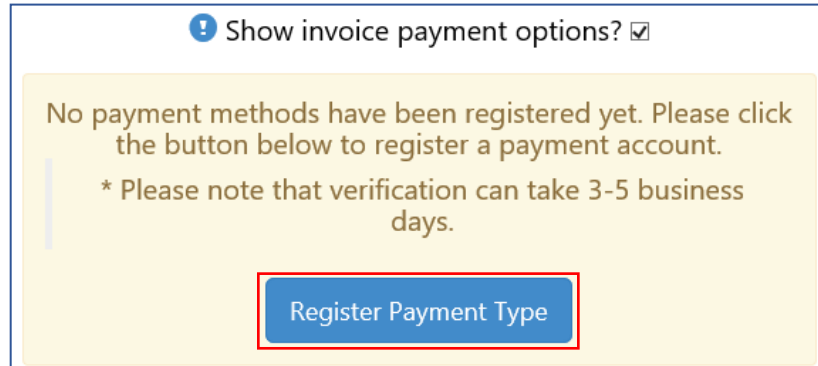

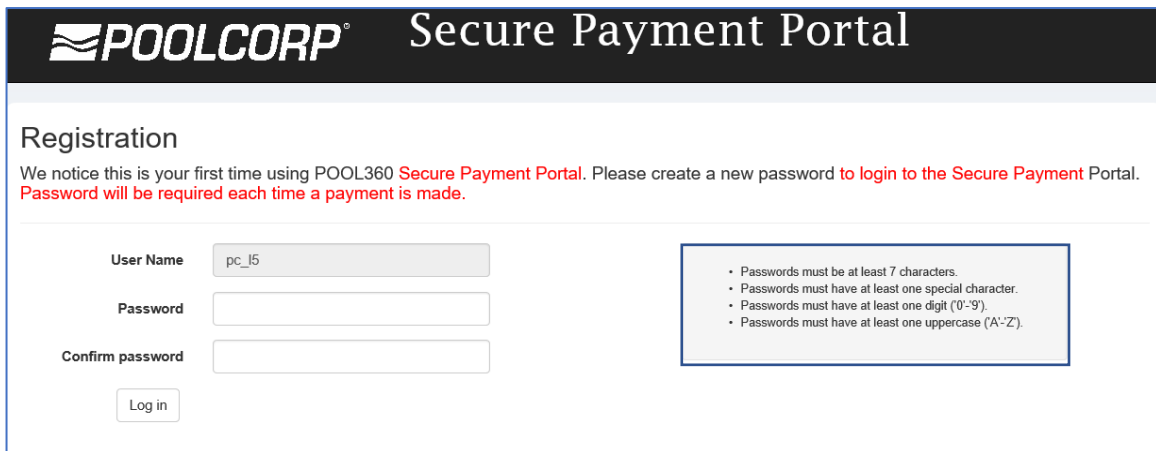3. On the **Order Status/History** page, click **Invoice History**

4. Once on the **Invoice History** page, select the option to **Show invoice payment options.**
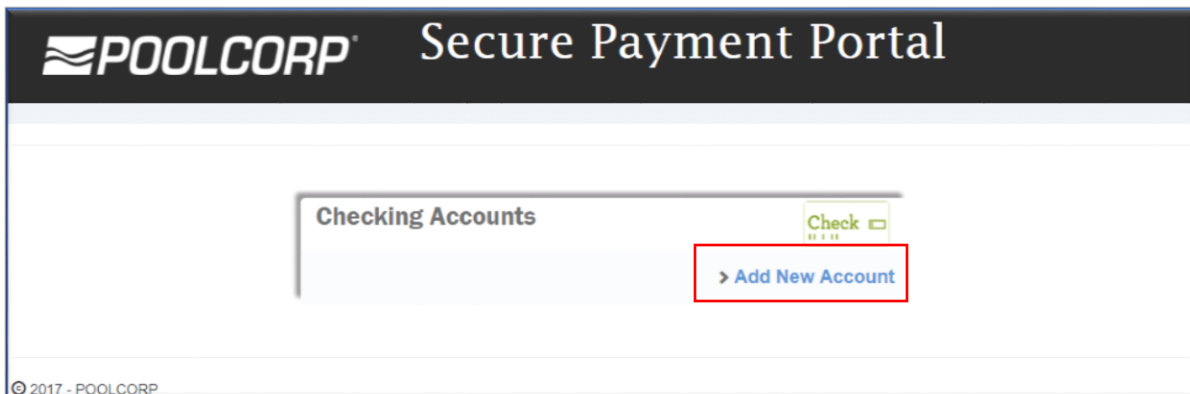
5. First time users will see the screen below, indicating that no payment has been set up yet. Selecting **Register Payment Type** will direct you to the POOL360 Pay registration screen.

6. Once at the **Secure Payment Portal**, you must create a new password for use on the payment portal following the guidelines listed.


7. After registering, you will have the option to add a new ACH payment type. Select **Add New Account** and a screen will pop up with the necessary fields to complete.

VERIFYING YOUR ACCOUNT

8. Once the New ACH Account details have been entered, you will be redirected back to POOL360. Navigate back to the POOL360 Invoice History page, where you will see the screen below. Selecting **Verify Checking Account** will direct you to the POOL360 Pay portal.

    NOTE: *You will receive two, small withdrawals from your checking account within 3-5 business days in which you will use to verify your account.*
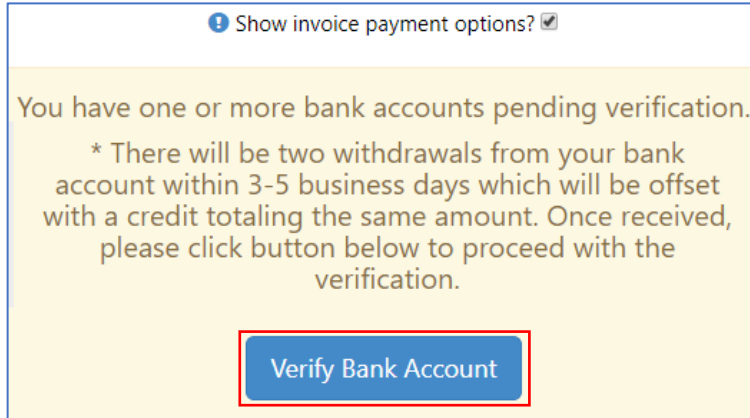

9. Once at the **Secure Payment Portal**, verify your account by entering the two amounts withdrawn from your bank account, and hit **Submit.**
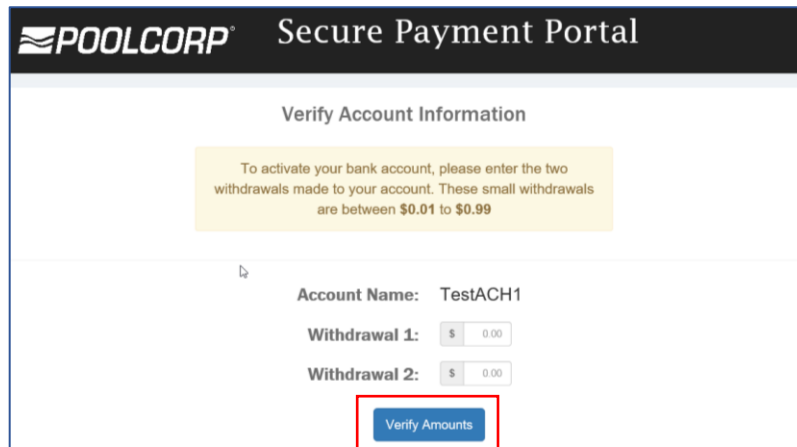

10. Once the account has been successfully verified, the user will be directed to the POOL360 Invoice History page.

FUTURE VERIFICATIONS

Any ACH accounts you would like to add in the future will be set up in the same way. You can reach the verification screen from within the POOL360 Pay main screen OR the POOL360 Invoice History screen. This button will only show when a payment type is pending verification.
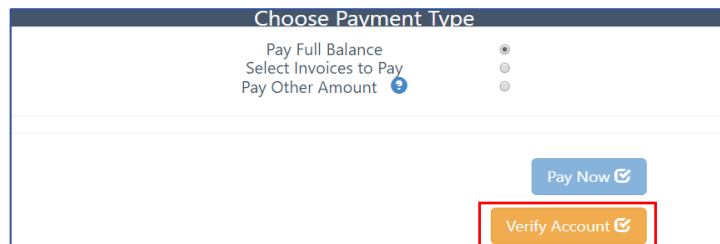
If there is at least one verified payment type AND a pending account is present, you will need to first verify the pending account if you are selecting that for use.
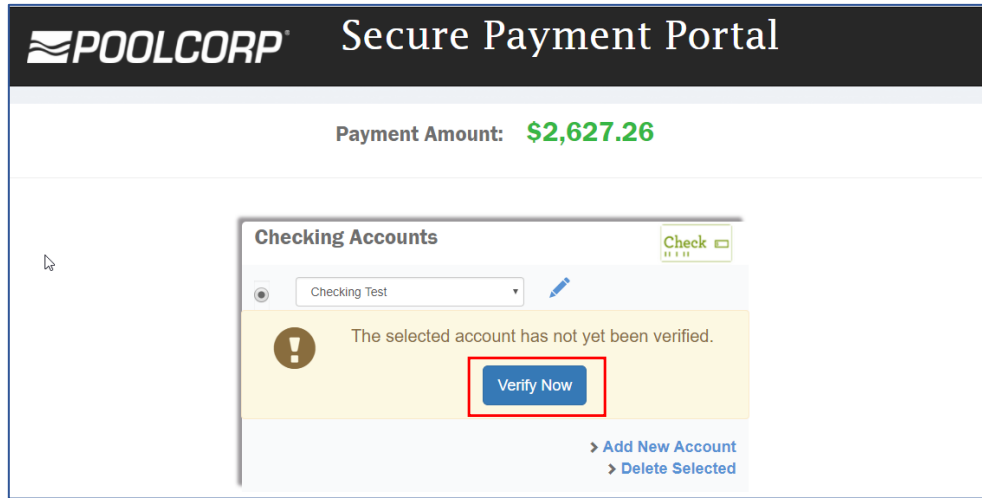
Clicking Verify Now will take you to the verification screen seen in Step #9.

PAYING WITH POOL360 PAY

1. Clicking on the box alongside **Show invoice payment options** will then prompt a box to **Choose Payment Type**.
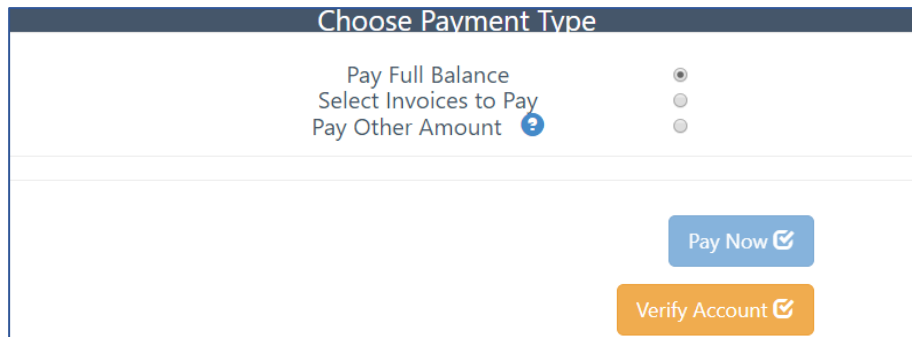
You can choose to **Pay Full Balance**, **Select Invoices to Pay**, or **Pay Other Amount.**

When selecting **Pay Full Balance**, your full balance will appear beneath the options listed. You can then select **Pay Now** to be directed to the payment portal.
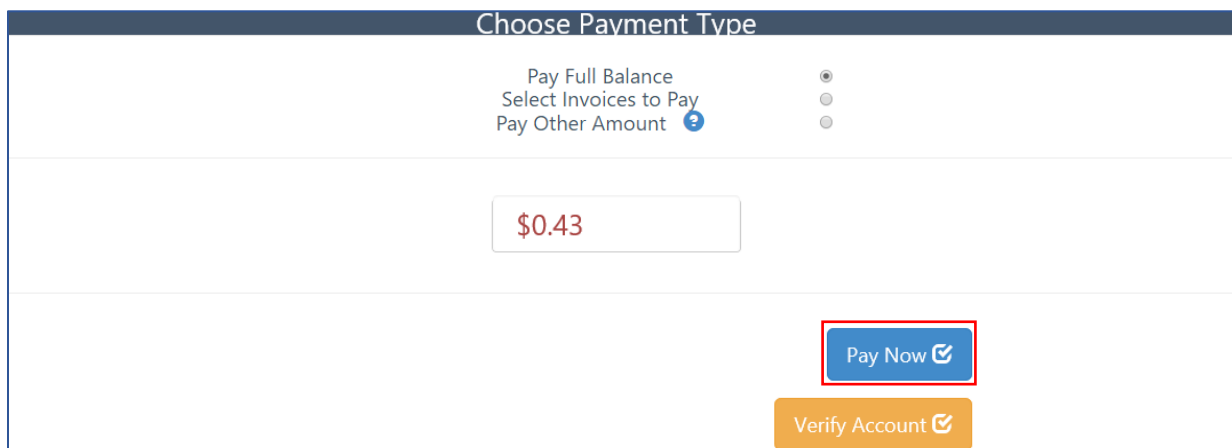
When selecting **Select Invoices to Pay**, a pop up will appear with a list of all the available invoices to be paid. You have options to select the **Amount to Apply** and which invoices to **Include**. Once you have entered how much to apply and which invoices are to be paid, click **Done.**

NOTE: *The invoice balance must result with a subtotal of $0.01 to be processed.*

Once you have clicked **Done**, your **Invoice Total** and **Credit Total** will appear below your **Payment Type** options, with the amount of your **Total Payment** displayed beneath. You can then select **Pay Now** to be directed to the payment portal or **Modify Selections** to change the invoices you have selected.

When selecting **Pay Other Amount**, a box will appear beneath the **Payment Type** options, allowing you to enter the amount you would like to pay. You can then select **Pay Now** to be directed to the payment portal.

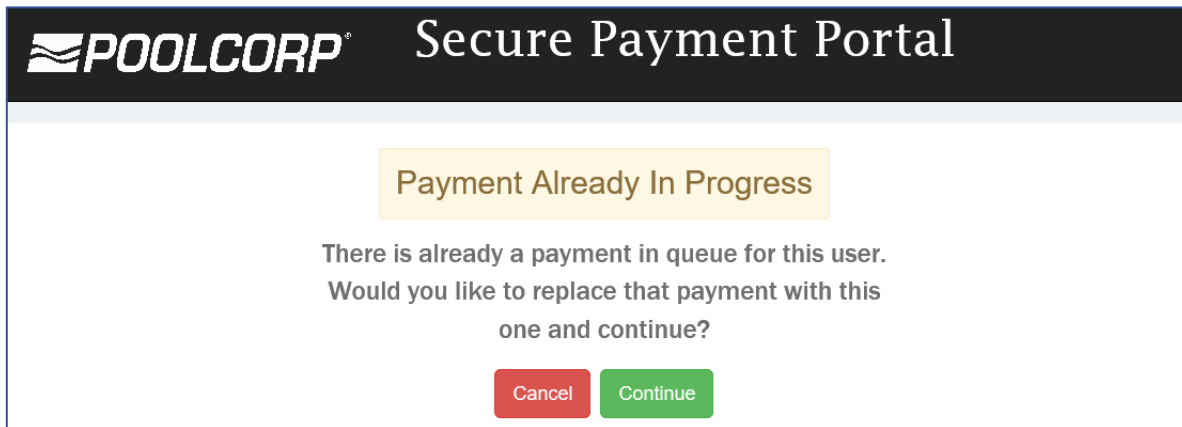**NOTE:** *The payment is applied from oldest invoice to newest*

# POOL360 PAY PROCESS

2. After clicking **Pay Now**, you will be routed to the **Secure Payment Portal**. If a Payment is already in Progress, you can opt to **Continue** with your payment, which will replace the payment in progress, or **Cancel**, which will bring you back to the POOL360 Invoice Page.

3. If you Continue with your payment, or no payment is in progress, you will be directed to the screen below, where you will select the verified ACH account you would like to pay your invoice with. Once you have selected the account, click **Submit Payment**.

    *NOTE: At any point in the **Secure Payment Portal**, you can select **Return to POOL360**, which will cancel any payments and return you to POOL360.*
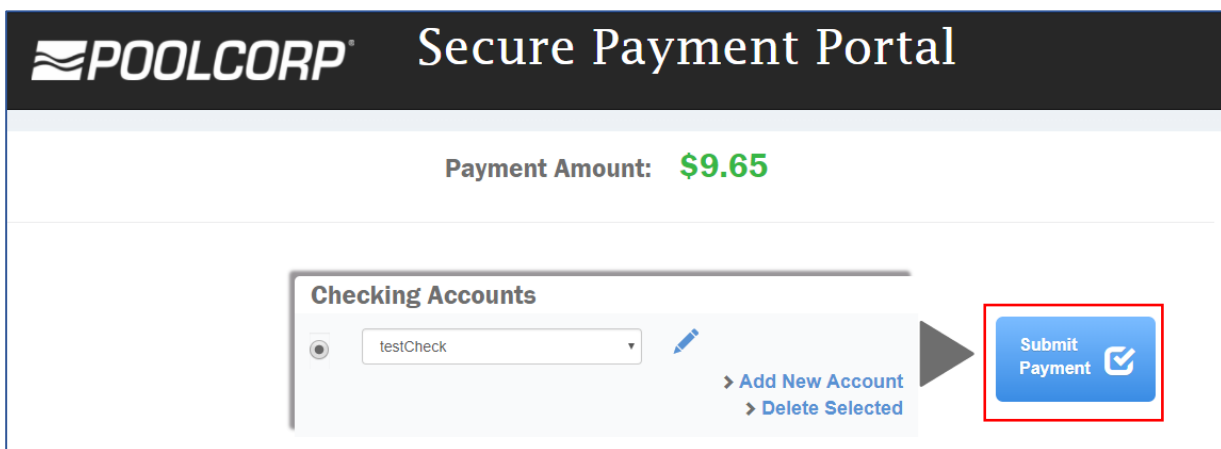
4. Once the payment has been submitted and successfully completed, you will be redirected to a POOL360 page stating that your Payment is Complete. You can then print out the completion page for your records or return to Invoice History.