Payments Integration

Collecting Payments
Sending Payment Request Links
Tracking Payments
Reports and Trends

improveit 360

Agenda

- Why use PaySimple to process payments?
- Real-time Payment processing - benefits and features
- Online Customer Portal - benefits and features
- Send a Request from improveit 360 requesting a Payment for a specific dollar amount
- Implementing Payment Schedule Reminders in improveit 360
- Report on Payments Received

Why do we recommend PaySimple?

PAYSIMPLE®

Real-time Payment Processing

- Get paid faster!
- PaySimple allows you to collect the payment immediately
- Mobile App transactions can process both Credit Card and ACH*

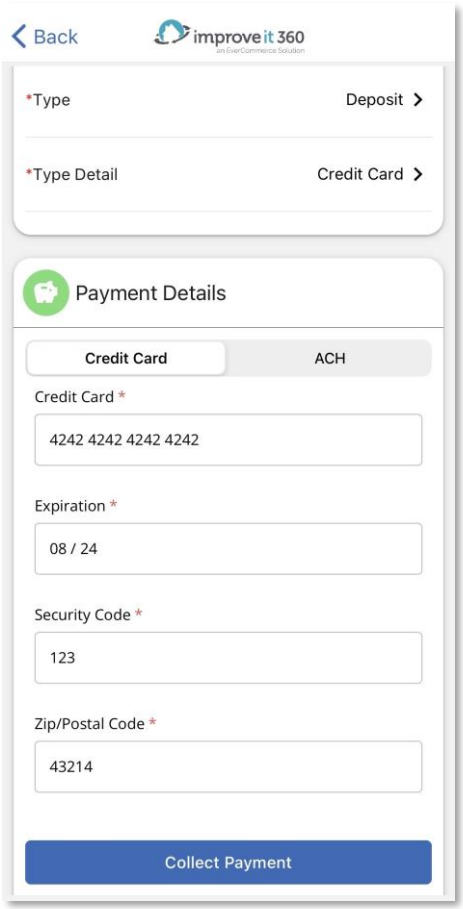
*ACH transactions can take longer to process. Payments Events are updated in improveit 360 in real time from PaySimple.

Mobile App Demo

Let's review how to Collect a Payment using PaySimple from the RemodelerGo mobile application

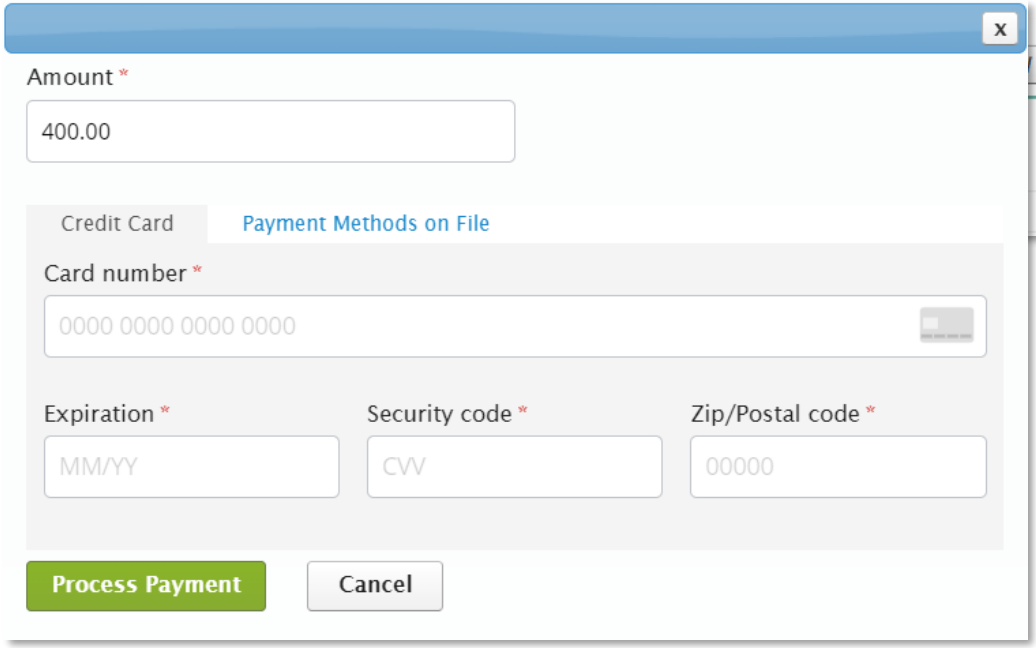
RemodelerGo is the latest mobile app from improveit 360

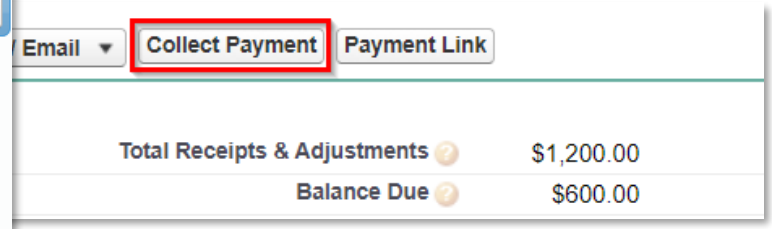
Available on the App Store and the Google Play Store



Desktop Collect Payment

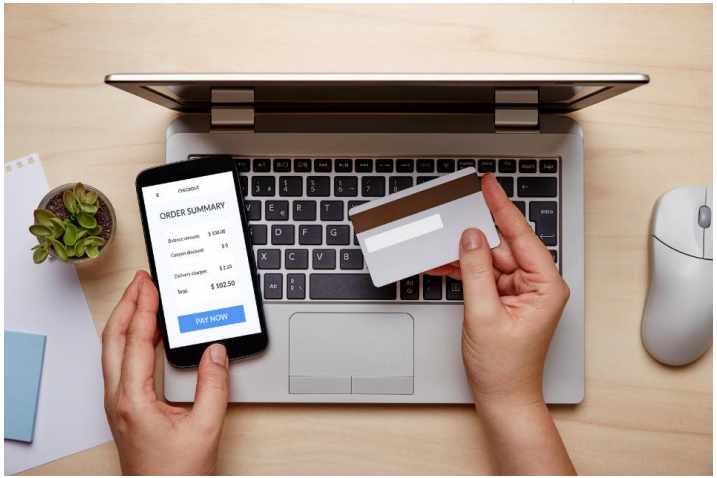
Now let's checkout the same feature from the desktop application.

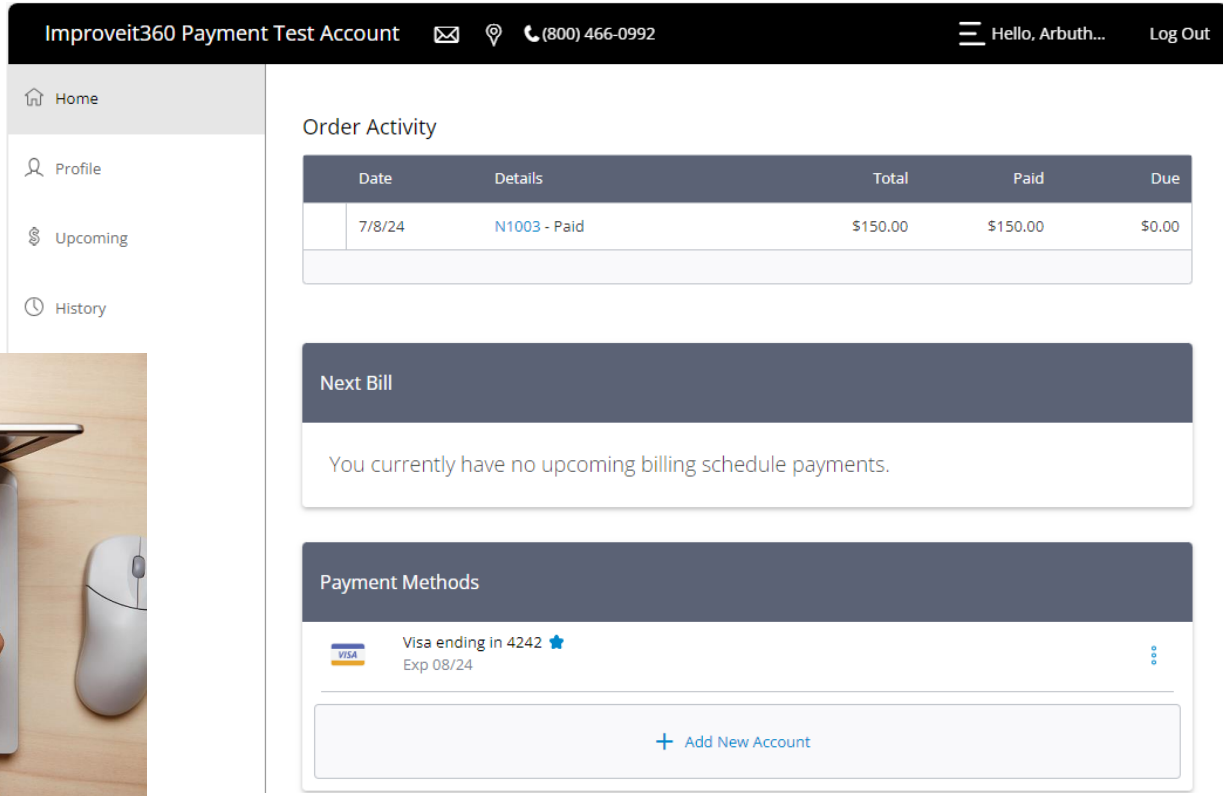




Online Customer Payment Portal

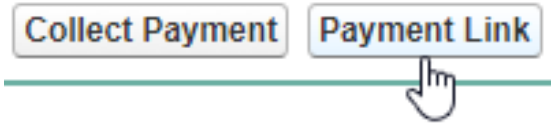
PaySimple makes it as easy as possible for consumers to pay you

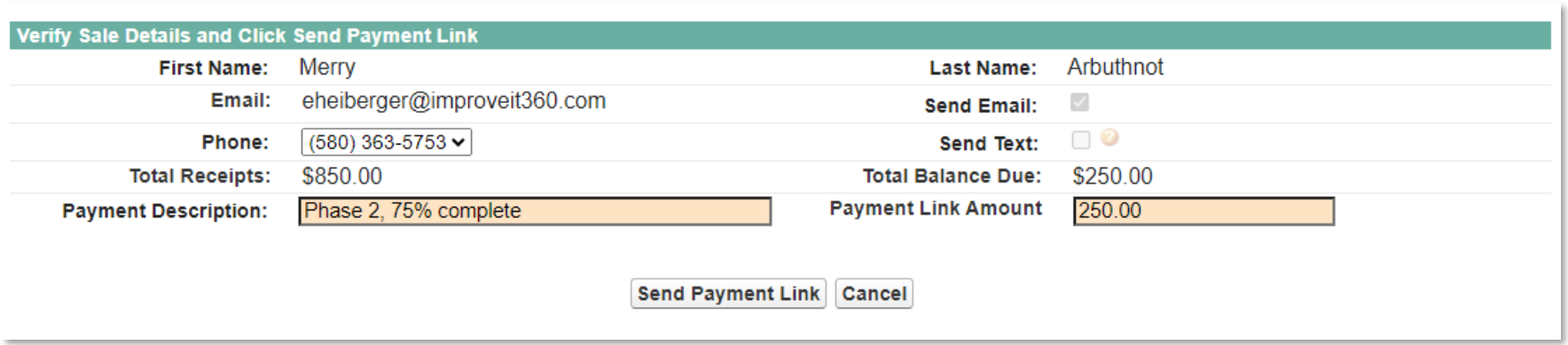




Request a Payment

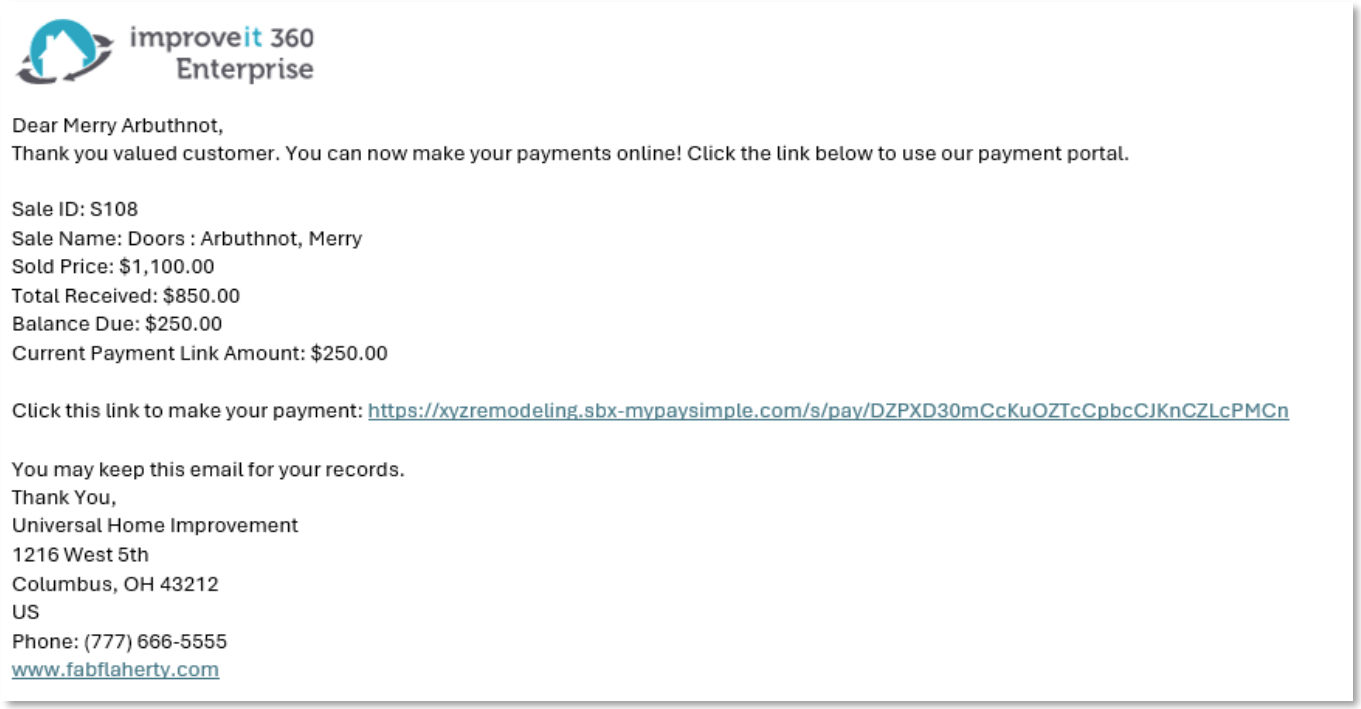
From within i360 request a Payment for a specific Dollar amount using the new **Payment Link** feature





Request Payment Email

The consumer receives an Email with a Hyperlink to quickly pay their bill.



improveit 360 Enterprise

Dear Merry Arbuthnot,
Thank you valued customer. You can now make your payments online! Click the link below to use our payment portal.

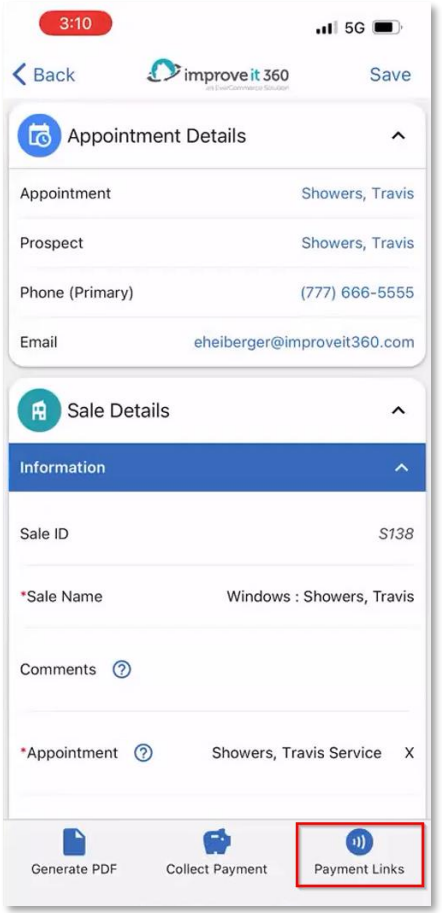
Sale ID: S108
Sale Name: Doors : Arbuthnot, Merry
Sold Price: $1,100.00
Total Received: $850.00
Balance Due: $250.00
Current Payment Link Amount: $250.00

Click this link to make your payment: https://xyzremodeling.sbx-mypaysimple.com/s/pay/DZPXD30mCcKuOZTcCpbcCJKnCZLcPMCn

You may keep this email for your records.
Thank You,
Universal Home Improvement
1216 West 5th
Columbus, OH 43212
US
Phone: (777) 666-5555
www.fabflaherty.com

Payment Link Demo

From the RemodelerGo application we will generate a Payment Link using our PaySimple integration and send the notification Email to the Prospect.



Implement a Payment Schedule

Use improveit 360 to calculate how much the customer owes you at different phases of the project.

Sale Detail | Edit | Delete | Attachment Manager | Print / Email | Collect Payment | Payment Link

▼ Information

Sold Price	$1,000.00	Total Receipts & Adjustments	$125.00
Market Segment		Balance Due	$875.00
Payment 1 Due Date	6/26/2024	Payment 1 Requested Amount	$100.00
Payment 1 Amount Due	$0.00	Loan Count	0
Payment 2 Due Date	7/19/2024	Payment 2 Requested Amount	$400.00
Payment 2 Amount Due	$375.00	Loan Program	
Payment 3 Due Date	8/3/2024	Payment 3 Requested Amount	$400.00
Payment 3 Amount Due	$0.00	Company	
Payment 4 Due Date	8/18/2024	Payment 4 Requested Amount	$100.00
Payment 4 Amount Due	$0.00	CompanyCam Link	Doors : Test, Franklin

Payment Schedule Notifications

Improveit will remind your Staff when it's time to send a Payment Request notification to the Prospect.

Please send a Payment Request Link on the following Sale record:

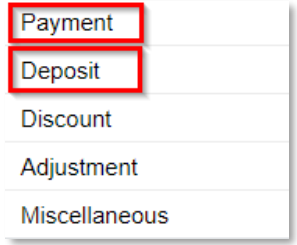
S008 for Mitchell Jenkins
Click here: : Jenkins, Mitchell

The Payment Schedule for this Sale is as follows:
Payment 1 Date: 5/31/2024, Amount Due: $0.00
Payment 2 Date: 6/23/2024, Amount Due: $3,003.07
Payment 3 Date: 7/8/2024, Amount Due: $6,392.73
Payment 4 Date: 7/23/2024, Amount Due: $7,240.14

If you have any questions, please reach out to your Manager.
Thank you,
Universal Home Improvement
1216 West 5th
Columbus, OH 43212
Phone: (777) 666-5555
www.fabflaherty.com

Payment Reporting

Most common Accounts Receivable Report: **Collections by Month YTD**

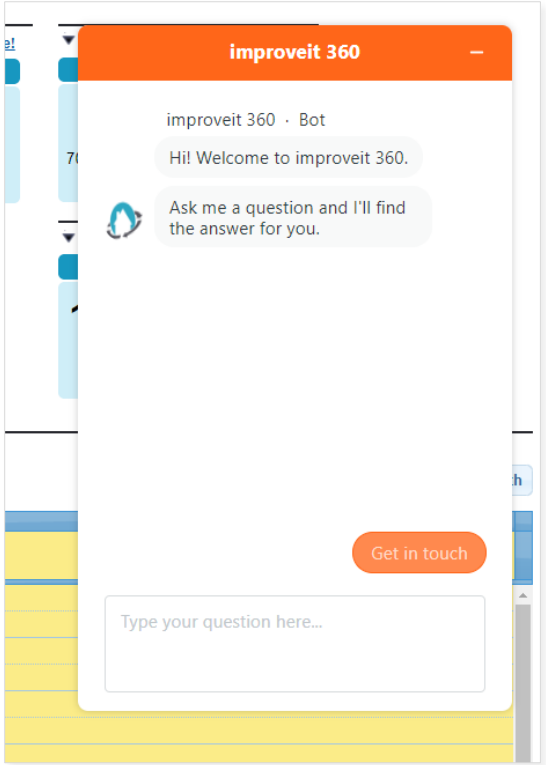


Run Report | Show Details | Customize | Save | Save As | Delete | Printable View | Export Details | Subscribe

	Sum of Amount	Received						Grand Total
	Type Detail	January 2024	February 2024	March 2024	April 2024	May 2024	June 2024	July 2024	
☐	Check	$15,895.00	$972.25	$5,000.00	$0.00	$0.00	$75.00	$50.00	$21,992.25
☐	Credit Card	$2,000.00	$0.00	$0.00	$3,695.00	$250.00	$0.00	$2,300.00	$8,245.00
☐	Bank Account	$1,234.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,234.00
	Grand Total	$19,129.00	$972.25	$5,000.00	$3,695.00	$250.00	$75.00	$2,350.00	$31,471.25

How to Reach Us

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at: https://support.improveit360.com/
3. Or Email Us: support@improveit360.com



Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time

Thanks for Attending

improveit 360