

# 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?

Innovation  
Integration  
Experience  
Overhead Enhance  
Convenience Safety  
**Customer**  
Cost-effectiveness  
Security  
Reduced Reliability  
Flexibility Support



# 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

A screenshot of the RemodelerGo mobile app's payment interface. At the top, there is a 'Back' button and the 'improveit 360' logo with the tagline 'an EverCommerce Solution'. Below this, there are two dropdown menus: '\*Type' with 'Deposit' selected and '\*Type Detail' with 'Credit Card' selected. A section titled 'Payment Details' contains two tabs: 'Credit Card' (selected) and 'ACH'. Under the 'Credit Card' tab, there are four input fields: 'Credit Card \*' containing '4242 4242 4242 4242', 'Expiration \*' containing '08 / 24', 'Security Code \*' containing '123', and 'Zip/Postal Code \*' containing '43214'. At the bottom of the form is a large blue button labeled 'Collect Payment'.

# Desktop Collect Payment

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

**Amount \***

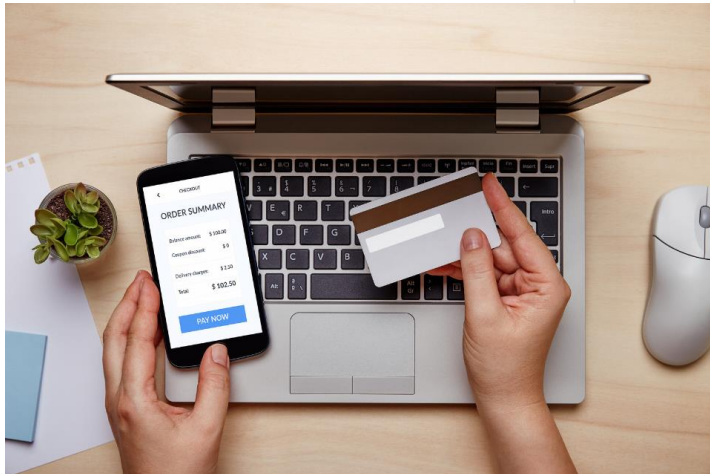
**Card number \***

**Expiration \***      **Security code \***      **Zip/Postal code \***

Email ▾	<b>Collect Payment</b>	Payment Link
<b>Total Receipts &amp; Adjustments</b> ?		\$1,200.00
<b>Balance Due</b> ?		\$600.00

# Online Customer Payment Portal

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



Improveit360 Payment Test Account ✉ 📍 ☎ (800) 466-0992 ☰ Hello, Arbuth... 🚪 Log Out

- 🏠 Home
- 👤 Profile
- 💰 Upcoming
- 🕒 History


### Order Activity

Date	Details	Total	Paid	Due
7/8/24	N1003 - Paid	\$150.00	\$150.00	\$0.00

### Next Bill

You currently have no upcoming billing schedule payments.

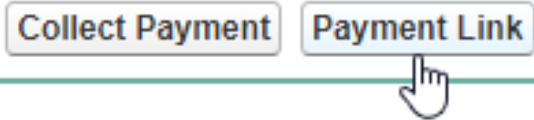
### Payment Methods

 Visa ending in 4242 ★  
Exp 08/24

[+ Add New Account](#)

# Request a Payment

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



**Verify Sale Details and Click Send Payment Link**

<b>First Name:</b> Merry	<b>Last Name:</b> Arbuthnot
<b>Email:</b> eheiberger@improveit360.com	<b>Send Email:</b> <input checked="" type="checkbox"/>
<b>Phone:</b> (580) 363-5753 ▼	<b>Send Text:</b> <input type="checkbox"/> 📧
<b>Total Receipts:</b> \$850.00	<b>Total Balance Due:</b> \$250.00
<b>Payment Description:</b> Phase 2, 75% complete	<b>Payment Link Amount:</b> 250.00



# Request Payment Email

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



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

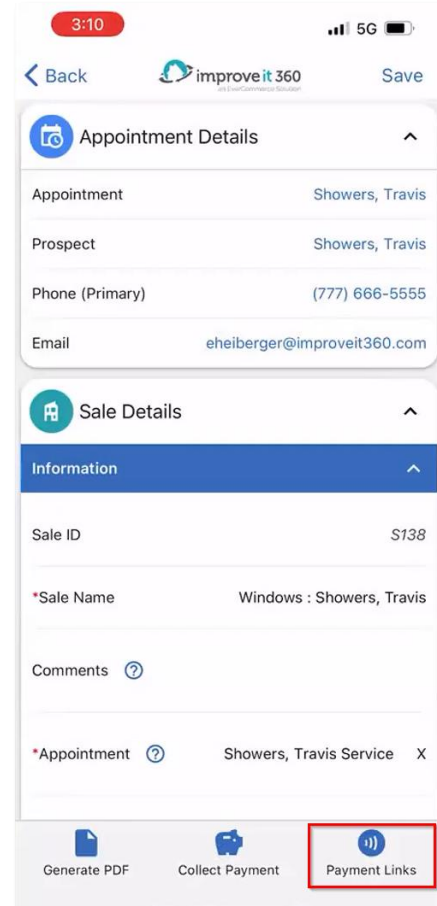
US

Phone: (777) 666-5555

[www.fabflaherty.com](http://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

<b>Sold Price</b> ⓘ	\$1,000.00	<b>Total Receipts &amp; Adjustments</b> ⓘ	\$125.00
<b>Market Segment</b> ⓘ		<b>Balance Due</b> ⓘ	\$875.00
<b>Payment 1 Due Date</b>	6/26/2024	<b>Payment 1 Requested Amount</b>	\$100.00
<b>Payment 1 Amount Due</b>	\$0.00	<b>Loan Count</b>	0
<b>Payment 2 Due Date</b>	7/19/2024	<b>Payment 2 Requested Amount</b>	\$400.00
<b>Payment 2 Amount Due</b>	\$375.00	<b>Loan Program</b> ⓘ	
<b>Payment 3 Due Date</b>	8/3/2024	<b>Payment 3 Requested Amount</b>	\$400.00
<b>Payment 3 Amount Due</b>	\$0.00	<b>Company</b>	
<b>Payment 4 Due Date</b>	8/18/2024	<b>Payment 4 Requested Amount</b>	\$100.00
<b>Payment 4 Amount Due</b>	\$0.00	<b>CompanyCam Link</b>	<a href="#">Doors : Test, Franklin</a>

# 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](http://www.fabflaherty.com)

# Payment Reporting

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

Payment
Deposit
Discount
Adjustment
Miscellaneous

[Run Report](#) [Show Details](#) [Customize](#) [Save](#) [Save As](#) [Delete](#) [Printable View](#) [Export Details](#) [Subscribe](#)

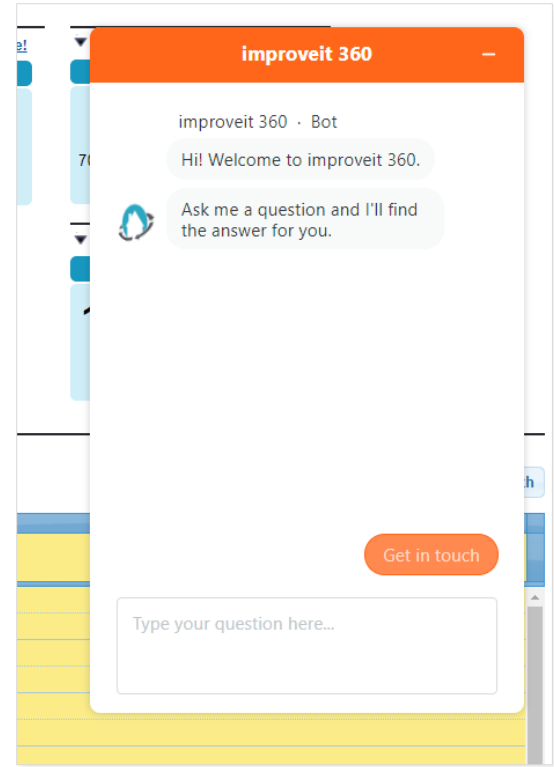
	Sum of Amount	Received							Grand Total
	Type Detail	January 2024	February 2024	March 2024	April 2024	May 2024	June 2024	July 2024	
<input type="checkbox"/>	Check	\$15,895.00	\$972.25	\$5,000.00	\$0.00	\$0.00	\$75.00	\$50.00	\$21,992.25
<input type="checkbox"/>	Credit Card	\$2,000.00	\$0.00	\$0.00	\$3,695.00	\$250.00	\$0.00	\$2,300.00	\$8,245.00
<input type="checkbox"/>	Bank Account	\$1,234.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,234.00
	<b>Grand Total</b>	\$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](mailto:support@improveit360.com)

## Support Office Hours:

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



Thanks  
for Attending



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