Agiliti eInvoice Connect User Guide

To access this site, start at https://www.agilitihealth.com/

- In the upper right corner, click **[Login]**
- From the dropdown, click **[Invoices]**

This is the Sign In screen . . .

Please note the link to the Enrollment Guide under our logo.

- This Guide will walk you through enrollment as well as help you navigate the site.

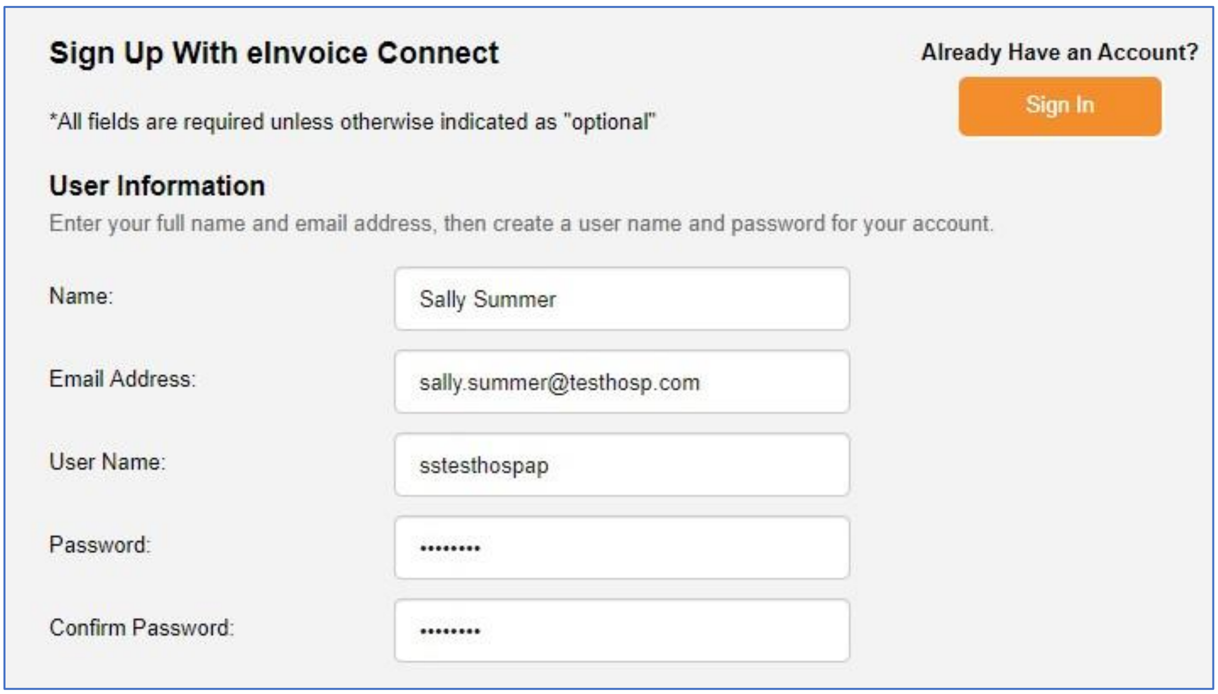
To Enroll in eInvoice Connect . . . You will only need to enroll once.

Click **[Sign Up Now]**

You will be taken to the ***Sign Up With eInvoice Connect*** screen.

User Information . . . This is where you create your User Name and Password.

- The first person to enroll for your facility is the Admin.



Account Information . . . This information will be found on your most recent invoice or statement

Account Information

To verify your account, enter your account number along with the enrollment token found on your bill.

Customer Number:	123456
Enrollment Token:	RDH KQL WSQ

Customer Number – Please use the ***Bill To*** customer from your invoice.

Enrollment Token – This can be found in the upper right corner of your invoice. See below.

RENTAL INVOICE

INVOICE NO.	START DATE	END DATE	PAGE
	03/01/2020	03/31/2020	1 of 1

INVOICE DATE	DUE DATE	PO NUMBER
04/30/2020	05/30/2020	

INVOICE SUMMARY	
Invoice Subtotal	80.00
+ Taxes	0.00
TOTAL DUE	**80.00**

TO VIEW ONLINE GO TO:	https://agilitihealth.billtrust.com
USE THIS ENROLLMENT TOKEN	RDH KQL WSQ

Security Questions . . . Please answer the three questions. The dropdowns offer other question options.

Security Questions

Select and answer three security questions.

Security Question 1:	What is your favorite hobby?
Answer 1:	
Security Question 2:	Who is your favorite athlete?
Answer 2:	
Security Question 3:	Where was your mother born?
Answer 3:	

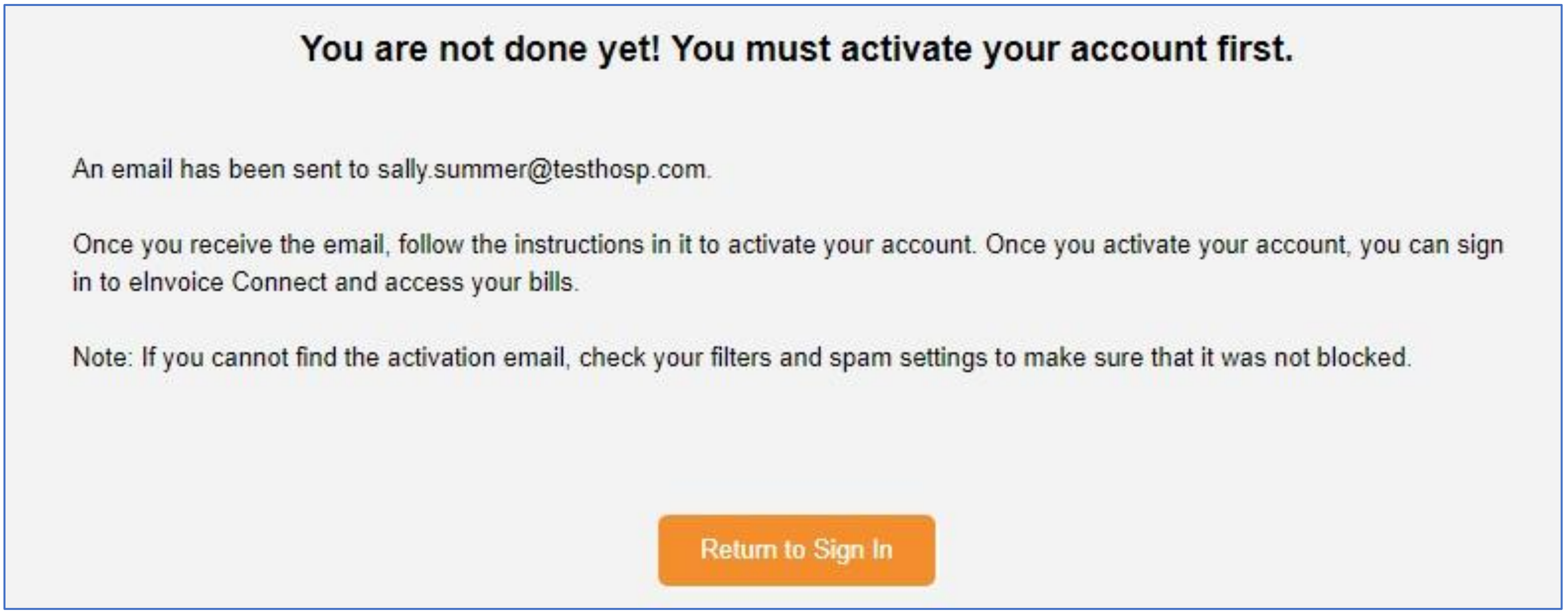
☐ Stop Sending Mail (Check here if you would like us to stop mailing your paper bills)

☑ I agree to the Subscriber Agreement

Sign Up

Remember to check ☑ I agree to the Subscriber Agreement

Click **[Sign Up]**

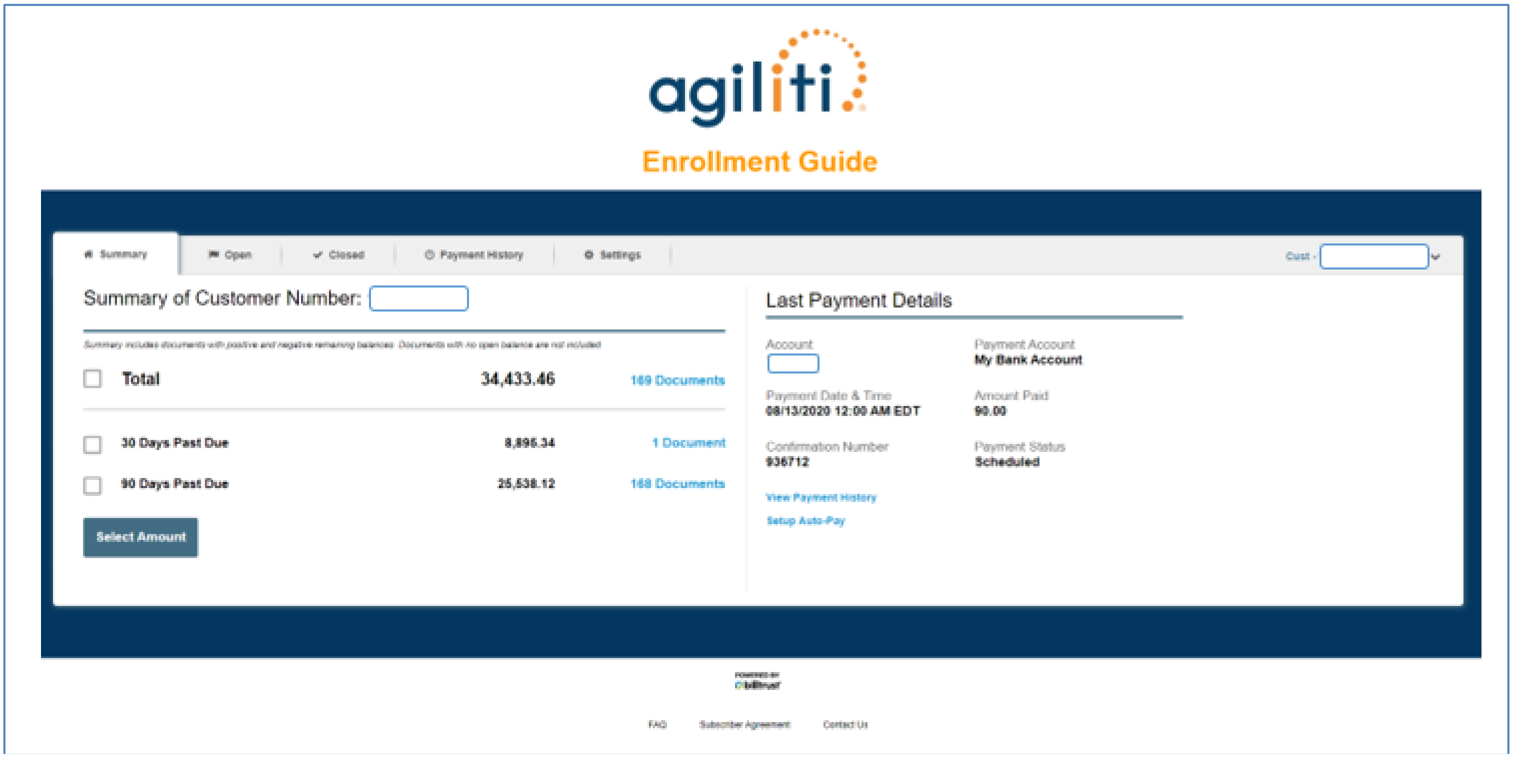


You will receive an activation email with a link.

- Click the link in the email.
- This will take you to the Sign In screen.
    - Sign in using the User Name and Password you set up during enrollment.
    - Continue to use these credentials whenever you access eInvoice Connect.

Navigating the site . . .

This is your main screen in eInvoice Connect.

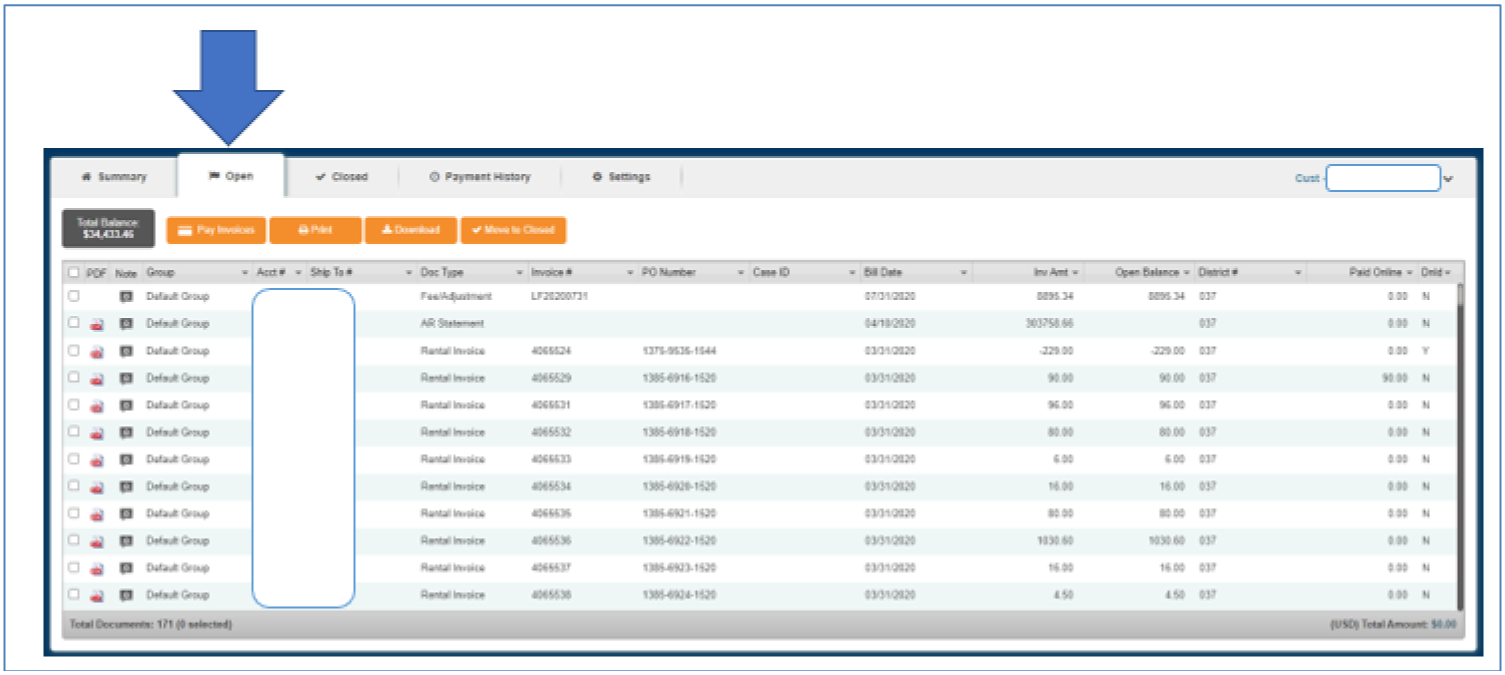


From this screen you can:

- View your Open (Unpaid) Invoices.
- View Closed Invoices.
- View your Payment History.
    - This will only reflect payments made in eInvoice Connect.
- Manage your settings.

View your Open (Unpaid) Invoices . . .

Click the **[Open]** tab.



This screen will provide you with invoice information for all your open invoices.

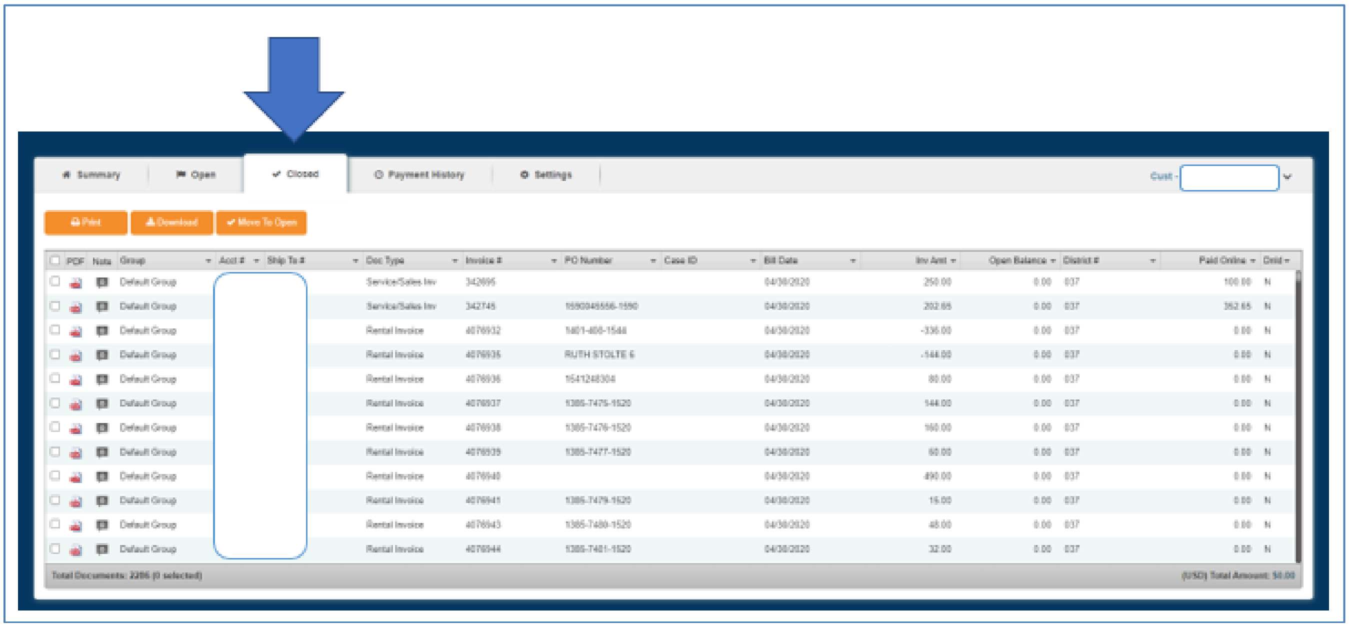
- **Pay Invoices . . .**
  - Check the invoice(s) you wish to pay.
  - Follow the prompts.
  - Invoices can be set up to pay at a future date by updating the ***Payment Date*** filed.
  - Invoices can be Short paid or Over paid. A Reason Code will need to be selected.

- **Print . . .**
  - Select a single or select multiple invoices to print.
  - Click the PDF icon to print a single invoice.

- **Download . . .**
  - Invoices can be downloaded into many different file formats.
  - Select a single or select multiple invoices to download.

View Closed Invoices . . .

Click the **[Closed]** tab.



This screen will provide you with invoices that had been Open but are now Closed.

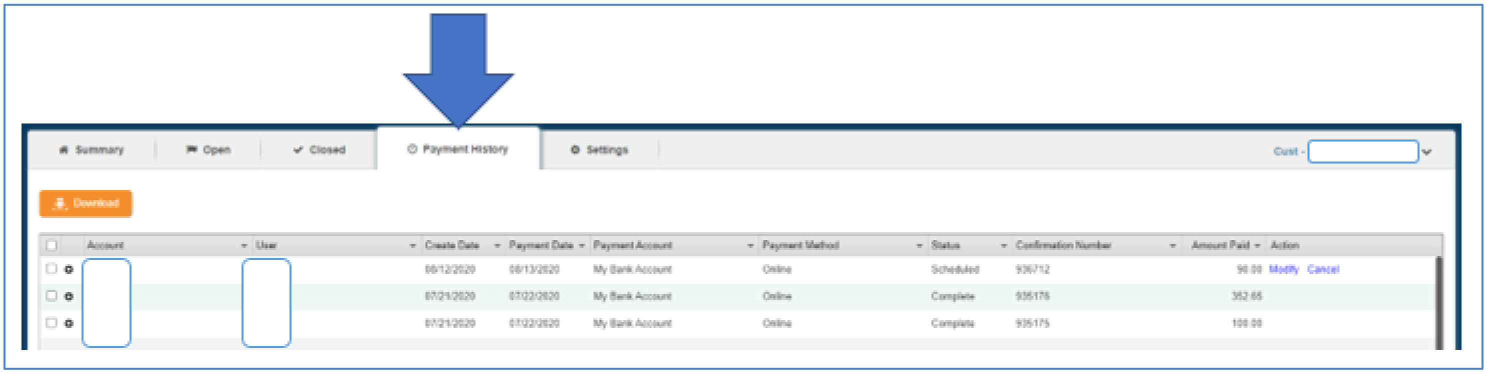
- **Print . . .**
  - Select a single or select multiple invoices to print.
  - Click the PDF icon to print a single invoice.

- **Download . . .**
  - Invoices can be downloaded into many different file formats.
  - Select a single or select multiple invoices to download.

View your Payment History . . .

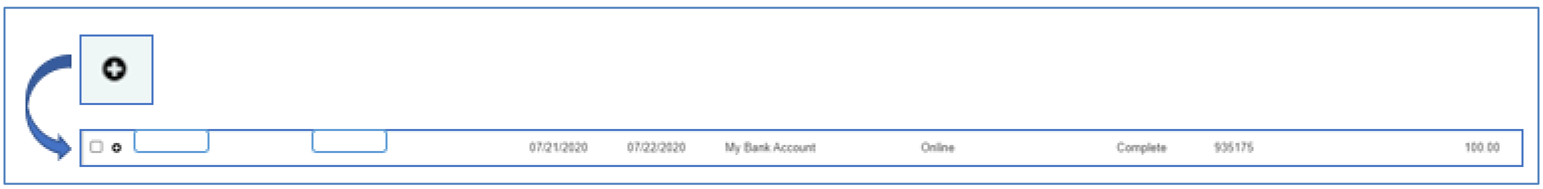
- **This will only reflect payments made in eInvoice Connect.**

Click the **[Payment History]** tab.



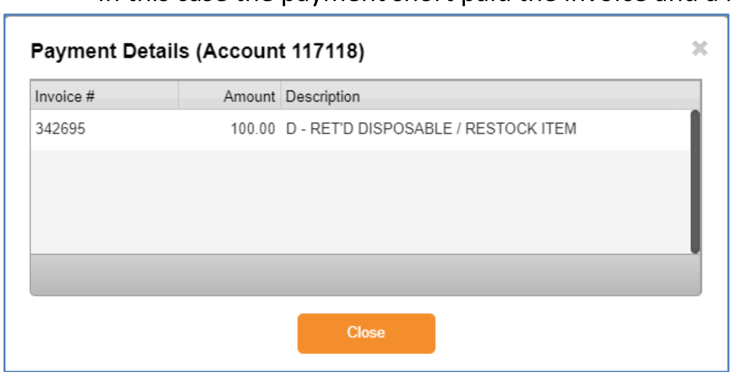
This screen will provide you with payment and invoice information of payments made in eInvoice Connect.

To get additional information about your payment please click the **[+]** . . .



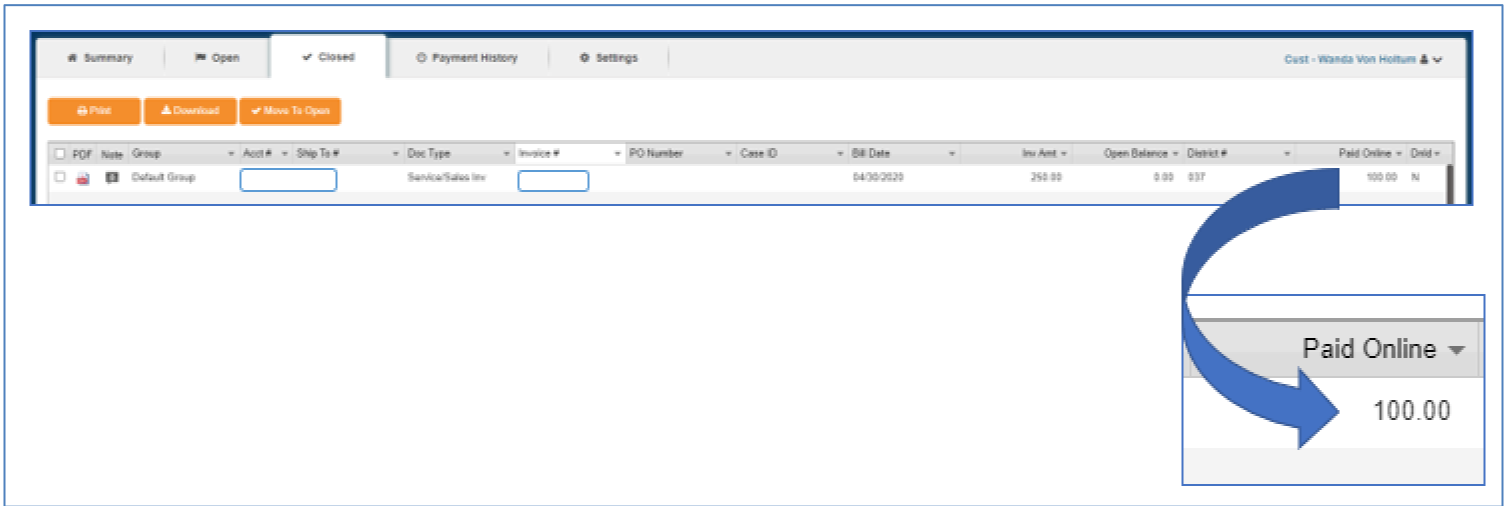
You will receive a pop-up box like this . . .

- In this case the payment short paid the invoice and a reason for the short payment has been selected.



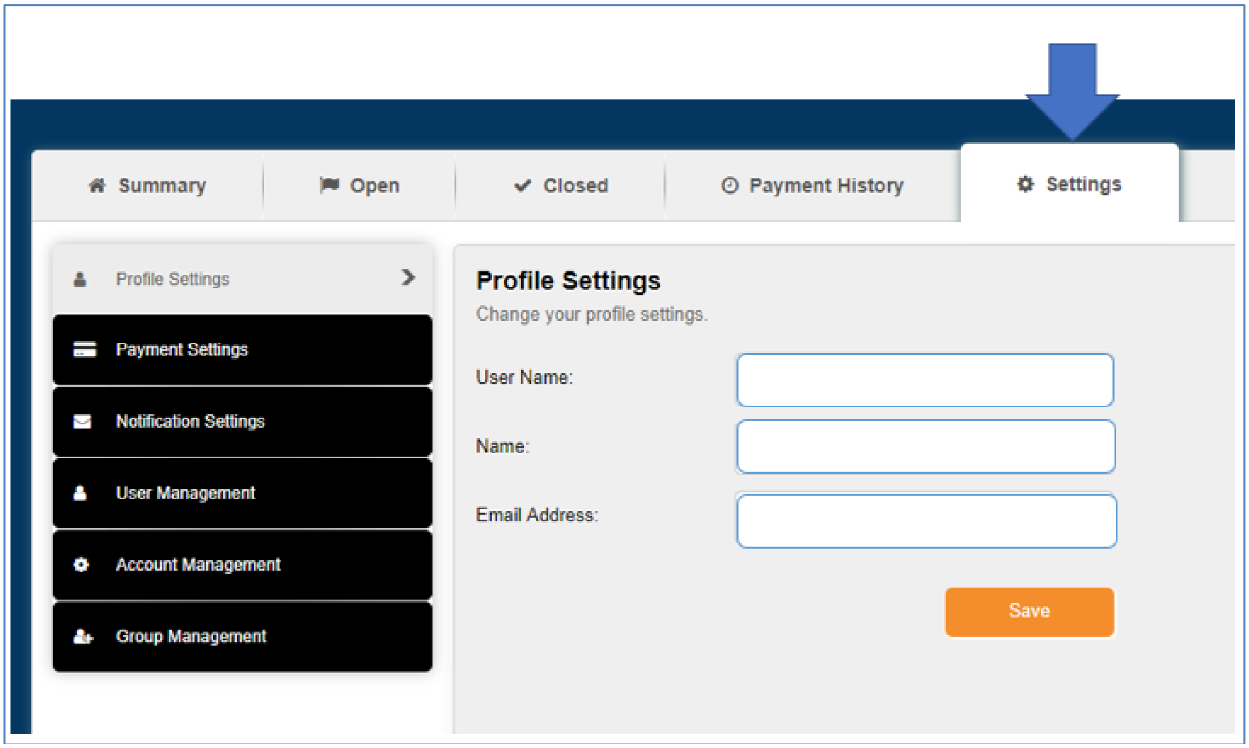
- **Download . . .**
  - Payments can be downloaded into many different file formats.
  - Select a single or select multiple payments to download.

By going back to your ***Closed*** screen, you can see that the invoice has closed and $100.00 was closed with an online payment.


Summary
Open
Closed
Payment History
Settings
Cust - Wanda Von Holtum
Print
Download
Move To Open
Paid Online
100.00

Manage your settings . . .

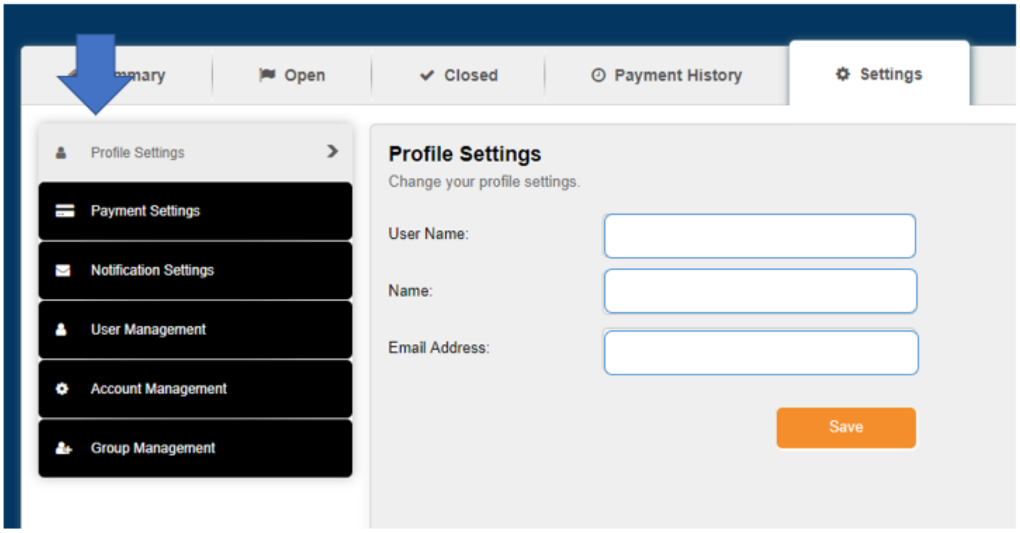
Click the **[Setting]** tab.



From this screen you can:

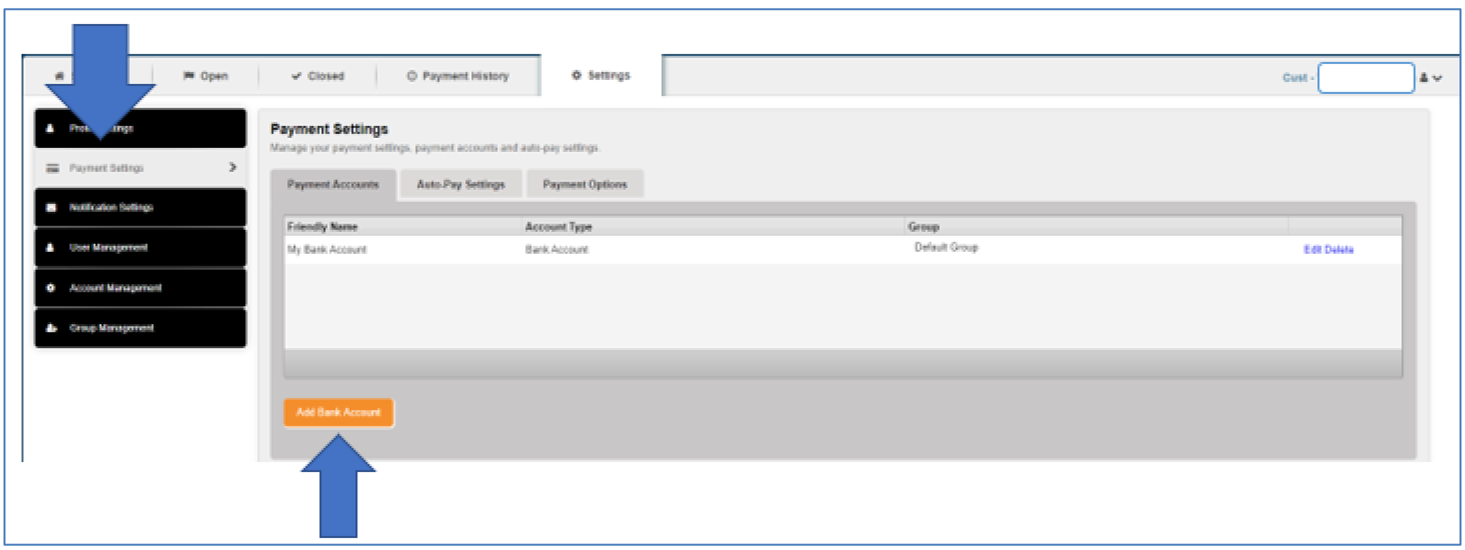
- Change your **Profile Settings**.
- Manage your **Payment Settings**, payment accounts and auto-pay settings.
- Manage your **Notification Settings**.
- **User Management** – Setup new users or edit exiting ones.
- **Account Management** – Add multiple accounts so that you can manage them all at the same time.
- **Group Management** – Setup new groups or manage existing ones. Groups are used to separate users, accounts and payment accounts.

Profile Settings . . .



- Make edits to your User Name, Name, and Email Address.
- Click **[Save]**.

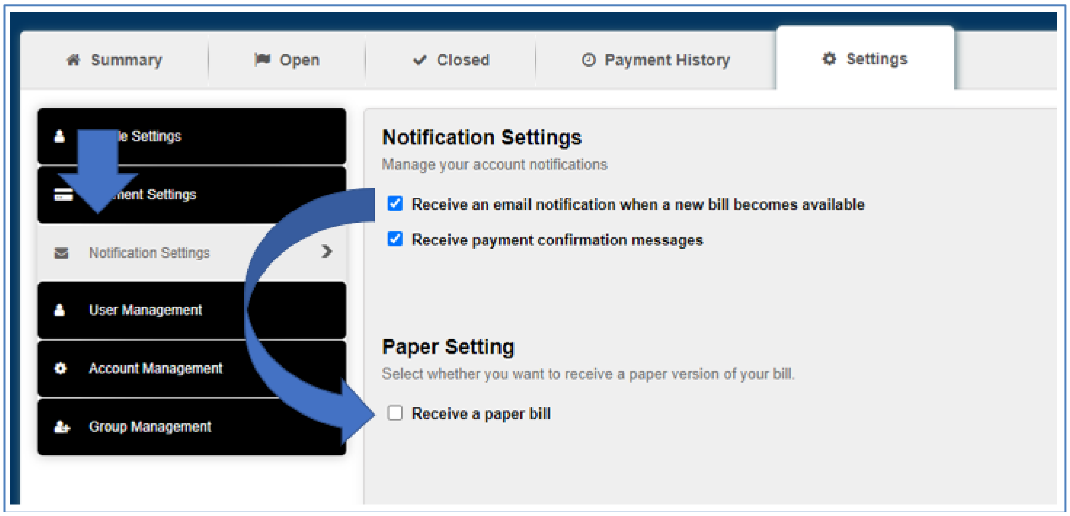
Payment Settings . . .



- On the ***Payment Accounts*** tab, click **[Add Bank Accounts]** and follow the prompts on the pop-up screen.
- The payment account must be assigned to at least on group.
  - Select an existing group or check Default Group.

- On the ***Payment Accounts*** tab, click **[Auto-Pay Settings]**
  - You can Enable this functionality.
  - You can pick the invoice payment date by selecting how many days prior to the invoice due date should the payment be scheduled. It can be anywhere from 0 (Due Date) to 30 days prior.

Notification Settings . . .

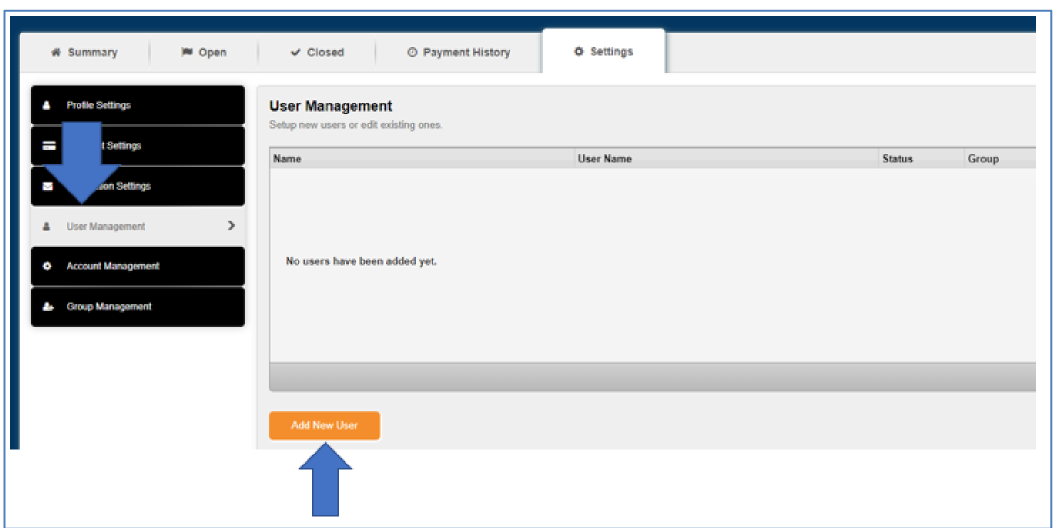


From this screen you can manage your invoice and payment notification.

You can determine if you receive paper invoice copies that are mailed to you.

- Since this customer selected to receive email notification when they receive a new bill, they have opted out of paper invoices.
    - The email notification this customer receives with include a list of all new invoices and a link to their Summary page.
    - From the Summary page they can access the Open tab to view all their new invoices along with any other invoices that are still open.

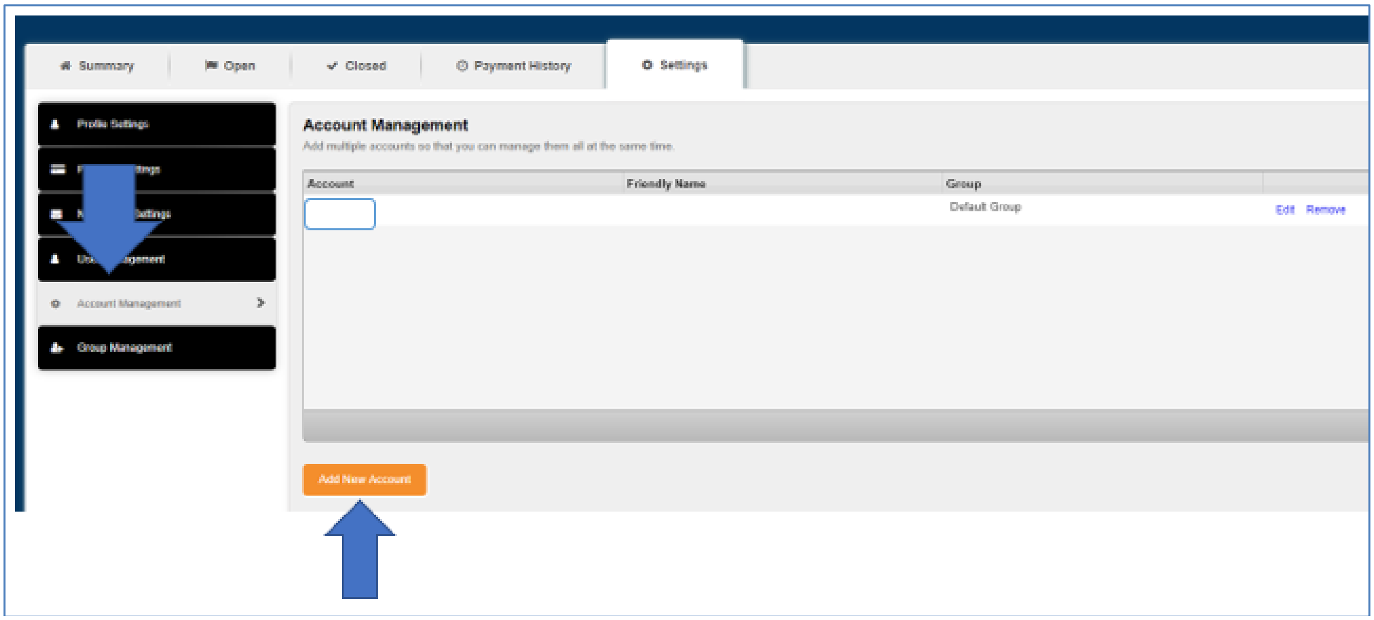
User Management . . .



From this screen you can add additional users to access this account.

- Click the **[Add New User]** tab and follow the prompts.
- You will have the ability to set privileges for each user.
- Each User will need to be added to a group. You may select Default Group.

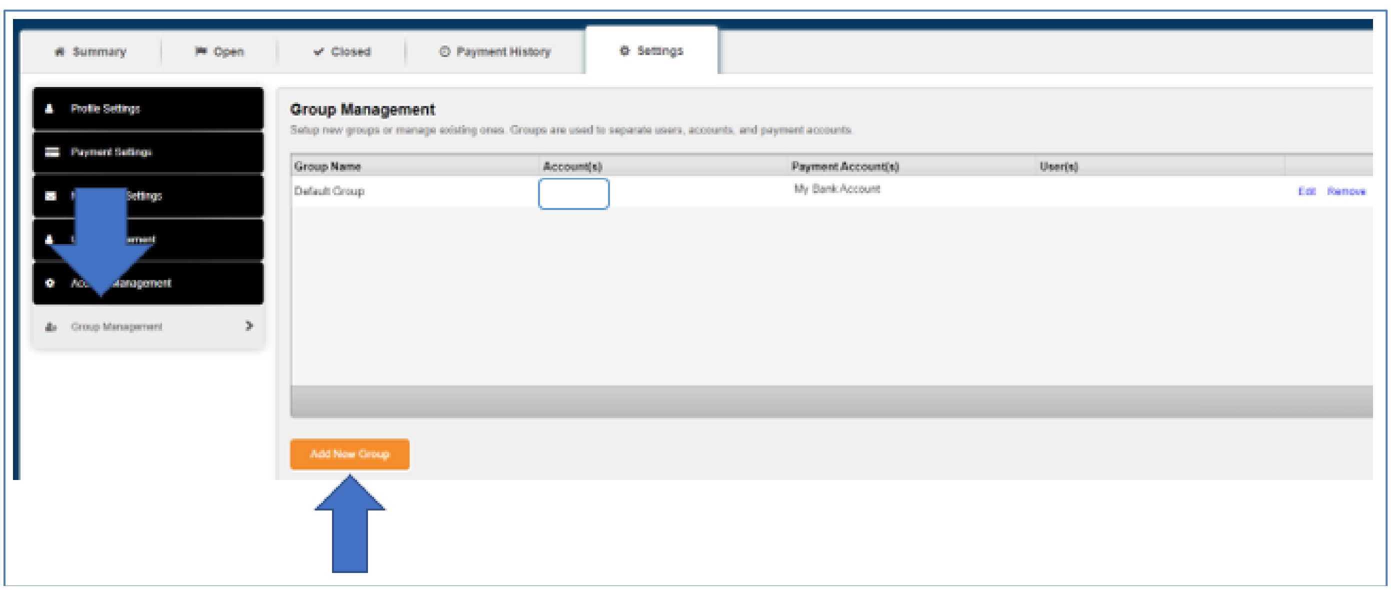
Account Management . . .



From this screen you can add multiple accounts to that you can manage them all at the same time.

- Click the **[Add New Accounts]** tab and follow the prompts.
- Each Account will need to be added to a group. You may select Default Group.

Group Management . . .



From this screen you can set up new groups or manage existing ones. Groups are used to separate users, accounts, and payment accounts.

- Click the **[Add New Group]** tab and follow the prompts.
- These are the groups that you will add to your other settings.