

ClientPay Pro — Training Manual — Payer Guide

ClientPay Pro is a multi-tenant payment platform for landlords, lenders, daycare centers and any business that bills clients. Businesses invoice payers by account number and collect via Stripe or PayPal (plus Zelle and mailed checks); payers log in to pay the bills assigned to them; and businesses can manage and pay their own vendor bills, run loans, and send statements. This manual walks you through everything, step by step, on desktop or mobile. Tip: use the Contents on the left to jump to a topic, or download this manual as a PDF from the button at the top of the Help page.

Getting started

Create your account

Sign up as a Company (to collect payments) or an Individual (to pay bills). You can register with email and password or with Google. Every account instantly gets a unique account number.

Your account number

Your account number is your identity on ClientPay Pro. Businesses assign invoices to a payer's account number, and payers share their number with a business so they can be billed. You'll find it at the top of your dashboard.

Signing in and recovery

Log in from the login page. If you forget your password, use 'Forgot password' to receive a secure reset link. You can also recover your login email or account number from the same page.

One login, multiple businesses

You can run more than one business (entity) under a single login. After signing in you'll pick which entity to work in, and you can switch entities anytime from the menu. Each entity keeps its own customers, invoices and settings.

Works on any device

ClientPay Pro is fully responsive. On a phone the menu collapses into a tap-to-open menu, wide tables become easy-to-read cards, and every form is touch-friendly, so you can manage and pay on the go.

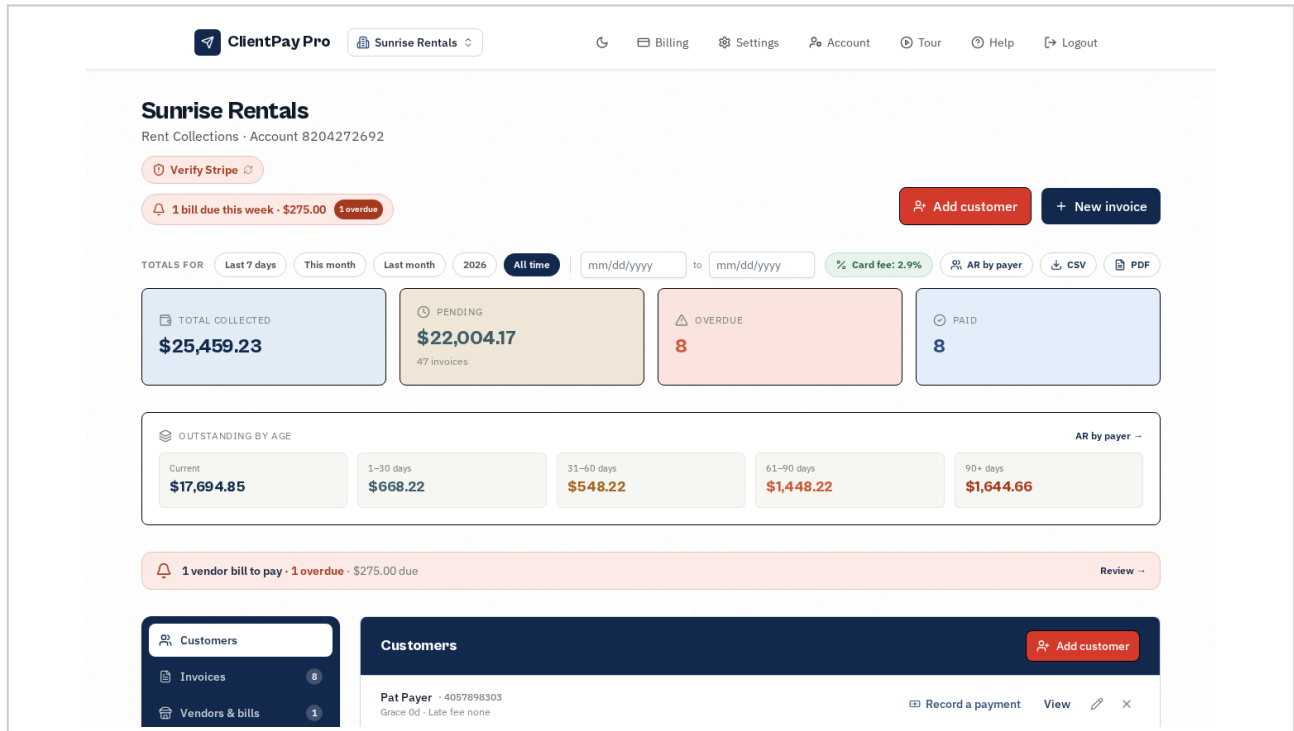


Figure 1. The business dashboard — your home base for customers, invoices, loans, vendors and reports.

Paying your bills (payers)

See your bills

Your dashboard lists every invoice assigned to your account number, sorted by due date, plus any loans you're repaying with their start and maturity dates.

Pay an invoice

Click Pay on any bill. If the business accepts bank payments, you'll choose Card or Bank (ACH) first and see each option's fee and total — bank usually costs less.

Set up Autopay

Enroll in Autopay to have recurring bills charged automatically to a saved card on their due dates. You'll get a reminder before each charge and can cancel anytime.

Bank payments take a few days

Card payments are instant. Bank (ACH) payments show as 'Processing' and are marked Paid once they clear (usually a few business days); you'll get your receipt by email then.

Your mailing address

Keep your mailing address up to date from the 'Mailing address' card on your dashboard. Add or update it, or tap 'Confirm it's correct' — it's shared with the businesses you pay and appears on your statements and receipts.

Loan payoff & statements

For any loan you're repaying, download a full statement, and pull a payoff quote (with a downloadable payoff letter) showing exactly what it takes to pay the loan off today.

Receipts & confirmation numbers

Download a PDF receipt for any payment. After a successful payment you'll see a confirmation number (e.g. CPP-A1B2C3D4) on the success screen and your emailed receipt — keep it as the quickest way for the business to find your payment.

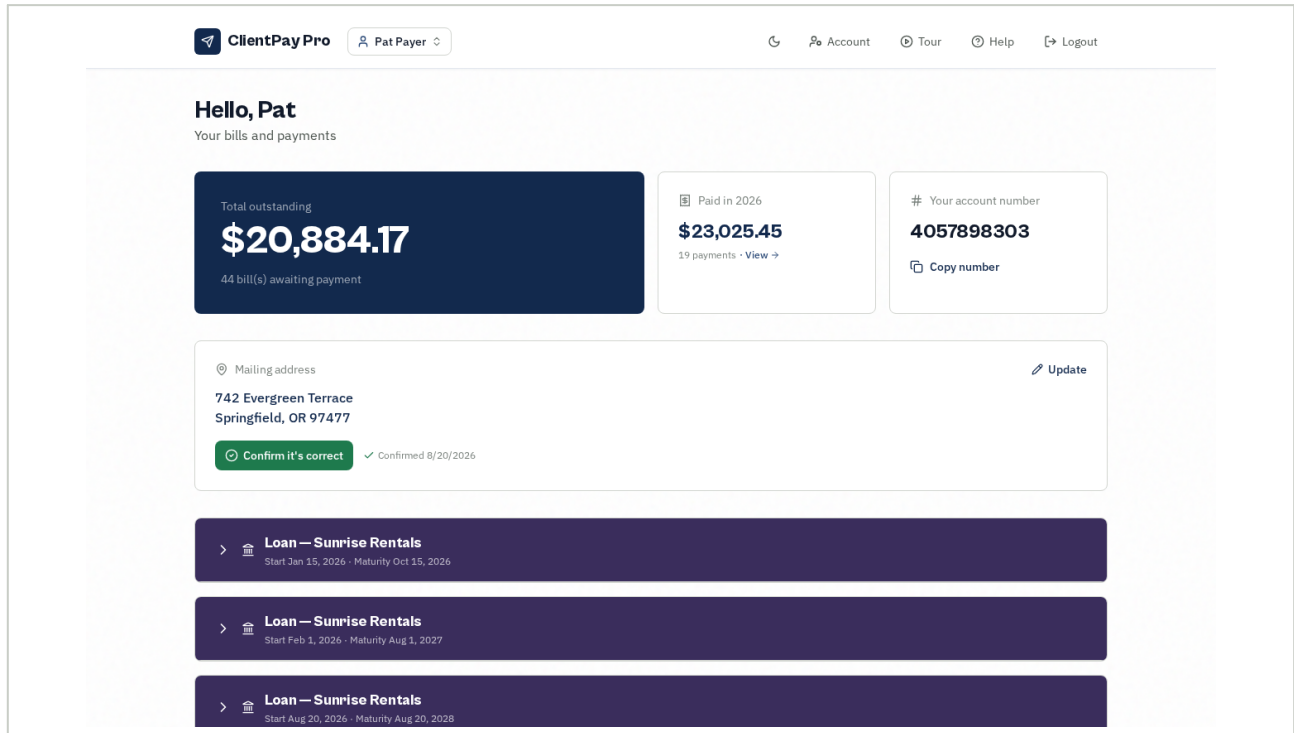


Figure 2. The payer dashboard: outstanding balance, the mailing-address card, and loans to repay.

Receipts, invoices & statements

Consistent, branded paperwork

Receipts, invoices, statements and loan documents are all branded with the business logo, and show the client's mailing address in the recipient/'Billed to' area, so your paperwork is consistent everywhere.

Always available

Businesses can download or email any document on demand; payers can download their own receipts, statements and payoff letters from their dashboard at any time.

Security & support

Security

Logins are protected against brute-force attempts. Payments are processed by Stripe or PayPal — ClientPay Pro never stores card or bank details.

Download this manual

Use the 'Download PDF' button at the top of the Help page to save or print this training manual for your team.

Replay the guided tour

New to the app? A guided tour runs on your first login. You can replay it anytime from the menu.

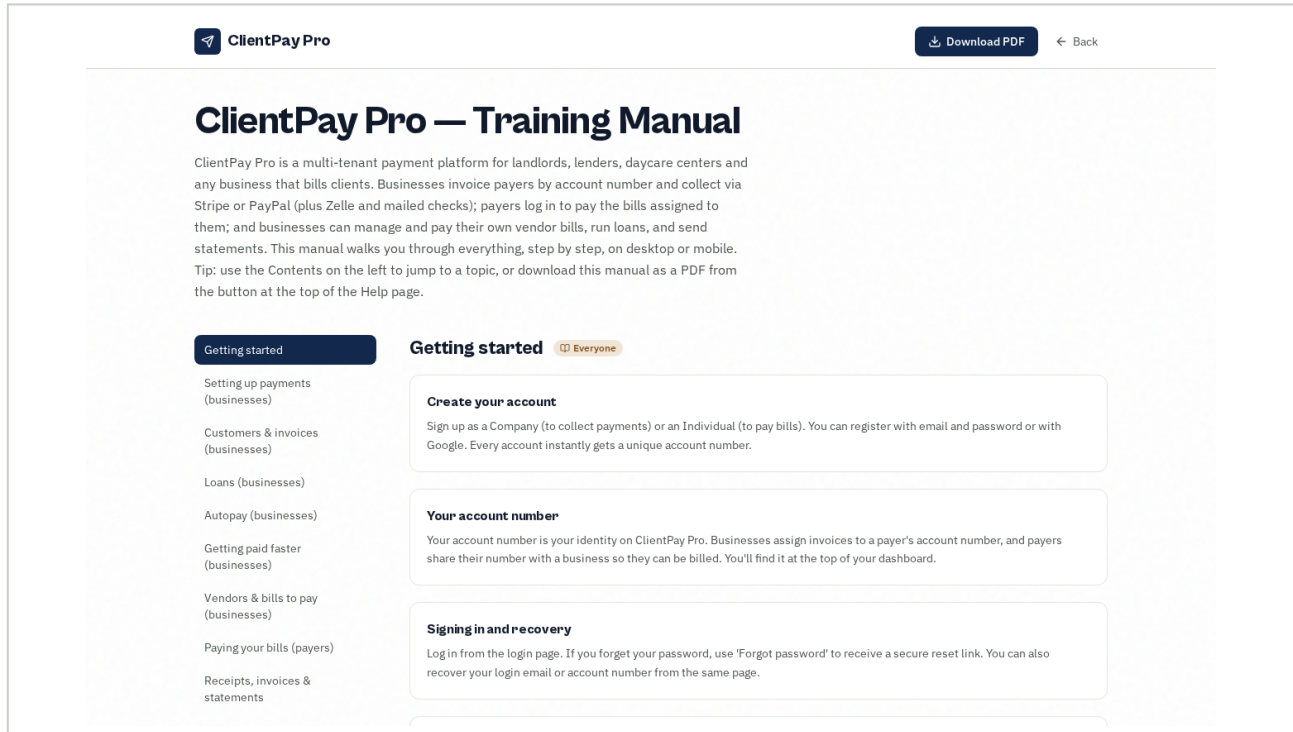


Figure 3. The in-app Help page, where this manual and the role-specific guides can be downloaded.