

## SOP BILLTRUST AUTOMATED CREDIT APPLICATION

The screenshot shows a web browser at the URL <https://app.billtrust.com/login>. The login form is titled "Sign in with your Billtrust ID" and includes fields for "Email Address" and "Password". The "Email Address" field has a red error message "Required field". The "Password" field has a red error message "Invalid username & password combination." Below the fields is a green "Sign in" button and a "Forgot Password" link. A white box with black text provides instructions: "Log on with the email address sent when account was created and Password" and "Then Click the Sign In Button". Blue arrows point from the text box to the "Email Address" field, the "Password" field, and the "Sign in" button.

Log on with the email address sent when account was created and Password

Then Click the Sign In Button

billtrust

Good morning!

Sign in with your Billtrust ID

Email Address

Required field

Password

Invalid username & password combination.

Sign in

Forgot Password

By clicking "Sign in" I agree that I have read and accept the Privacy Policy

Website for log on: <https://app.billtrust.com/login>

SOP BILLTRUST AUTOMATED CREDIT APPLICATION

Workspace

Accounts

Reporting

billtrust

Settings

Help

Denice Filliger  
ECCOUSA

Workspace

Invoicing

Payments

Credit

Client Connect

Search

Search

Credit Applications

View Applications

Assigned to me

Time frame

Last 7 days

7 Mar 2023 - 13 Mar 2023

Note

No applications found for selected criteria.

Completed Applications:

View Applications

Assigned to me

Time frame

Last 7 days

7 Mar 2023 - 13 Mar 2023

Approved Applications

2

Cancelled Applications

4

View List

Click the New Application Button

+ New Application

Page 2 of 10

## SOP BILLTRUST AUTOMATED CREDIT APPLICATION

If the customer does not appear in the search click the **Add New Company** button and this screen will appear to add your customer information

The screenshot shows a web browser window with the URL <https://app.billtrust.com/workspace/credit-manager/new-application/company>. The application is titled "New Application" and is in "Step 1: Find Recipient". The "Search By Company Info" section contains two input fields: "Company Name (required)" and "Country(required)". A green "Search" button is located below these fields. To the right of the "Search" button are two buttons: "+ Add New Company" and "Next Step". A callout box with a black border and white background is overlaid on the form, containing the following text: "Add the new **Company Name** to this field (1) and choose **United States** in the **Country** Field a Then Click the **Search** button". Blue arrows point from the text in the callout box to the "Company Name" field, the "Country" dropdown menu, and the "Search" button. The left sidebar of the application shows a navigation menu with "Workspace", "Accounts", and "Reporting" at the top, and "Invoicing", "Payments", "Credit", and "Client Connect" below. The "Credit" option is currently selected.

Workspace Accounts Reporting

Workspace

Invoicing Payments Credit Client Connect

New Application

Step 1: Find Recipient

Search By Company Info

Company Name (required) Country(required)

Search

+ Add New Company Next Step

Add the new **Company Name** to this field (1) and choose **United States** in the **Country** Field a Then Click the **Search** button

Cancel

SOP BILLTRUST AUTOMATED CREDIT APPLICATION

Existing Customer Contact Entry Screenshot

New Application

Step 1: Find Recipient

Search By Company Info

Company Name (required)  
testequity

Country(required)  
United States

Search

Select Company

| Company                                         | Address                                          | Phone |
|-------------------------------------------------|--------------------------------------------------|-------|
| <input type="radio"/> TESLA, INC.               | 1 TESLA ROAD,AUSTIN,TX,78725                     | (512) |
| <input type="radio"/> TESORO CORPORATION        | 19100 RIDGEWOOD PKWY,SAN ANTONIO, TX,78259-1834  | 210   |
| <input type="radio"/> TESARO, INC.              | 1000 WINTER ST,WALTHAM,MA,02451-1436             | 339   |
| <input checked="" type="radio"/> TESTEQUITY LLC | 6100 CONDOR DR,MOORPARK,CA,93021-2608            | (805) |
| <input type="radio"/> TESTAMENT LLC             | 1800 JIMMIE DAVIS HWY,BOSSIER CITY,LA,71112-4595 | 318   |
| <input type="radio"/> TESTA BUILDERS INC.       | 2335 2ND ST,CUYAHOGA FALLS,OH,4422               | 330   |

Add New Contact

Contacts

☐ Dan  
Copsey  
- Email

☐ A  
S  
aschnitzer@billtrust.com Email

☐ Dmitri  
Tisdale  
dtisdale@billtrust.com Email

+ Add New Company

Next Step

Cancel

If the customer name appears in the search, the next screen will appear when the customer name radio button is chosen. **Choose or Add** the customer contact name. Once this has been completed click the **Next Step** button

New Customer Addition Screenshot

New Application

Step 1: Add New Company

Company Details

Company Name (required)

Country(required)  
United States

Address 1 (required)

Address 2

City (required)

State (required)

Phone Number (required)  
US +1 000-000-0000

Contact Details

Email (required)

First Name (required)

Last Name (required)

Title

Phone Number  
US +1 000-000-0000

Back to Search

Next Step

Cancel

If the customer does not appear in the search click the **Add New Company** button (shown on prior screen print) and this screen will appear to add your customer information.

When completed click the **Next Step** button

## New Application



### Step 1: Complete

**Company**

TESTEQUITY LLC  
6100 Condor Dr  
Moorpark, 93021-2608

**Recipient**

ABBOTT, KEN  
kla+36@ecco.com

Edit

### Step 2: Define Application

**Application Forms**

Select Form



- ECCO Credit App New Customer
- ECCO Existing Customer LOC Increase & New Door
- DO NOT USE - ECCO Credit App New Customer w/ E-tailer
- DO NOT USE - ECCO New E-Tailer

Next click the **drop down arrow** under **Application Forms** and choose the application to send to the customer

New Application

Step 1: Complete

Company

TESTEQUITY LLC

6100 Condor Dr

Moorpark, 93021-2608

Recipient

ABBOTT, KEN

kla+36@ecco.com

Edit

Step 2: Define Application

Application Forms

ECCO Credit App New Customer

Select Group (required)

✓ ☒ Division

☒ ECCO

Click **Send Application**

At this point the customer will receive a Welcome Email and you have completed the process.

Send Application

To Reopen an Expired Credit Application

WorkspaceAccountsReporting

billtrust

SettingsHelpKen AbbottECCOUSA

Workspace

InvoicingPaymentsCreditClient Connect

Search

Search

Credit Applications

+ New Application

View Applications

Assigned to my departments

Time frame

Last 7 days

5 Apr 2023 - 11 Apr 2023

Initiated

1

In Process

1

Submitted

1

In Review

1

| Account Information | Account Number | Application User      | Days Remaining | Groups      | Last Updated | Last Application |
|---------------------|----------------|-----------------------|----------------|-------------|--------------|------------------|
| GREENSBORO COUN...  |                | Initiator<br>Reviewer | Hugh Bell<br>- | 10 Division | ECCO         | Apr 11, 2023     |

Showing 1 to 1 of 1 rows

<<

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1

>

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10

Completed Applications:

View List

View Applications

Assigned to my departments

Time frame

Last 7 days

5 Apr 2023 - 11 Apr 2023

Cancelled Applications

9

Expired Applications

4

SOP BILLTRUST AUTOMATED CREDIT APPLICATION

Workspace

Accounts

Reporting

Workspace

Invoicing

Payments

Credit

Client Connect

Credit Applications List

View Applications

Assigned to me

Status

Time frame

Application Option

Closed Only

Last 7 days

5 Apr 2023 - 11 Apr 2023

List

Submit

Groups

Edit

Division

ECCO

ECCO ET

ECCO ND

Download

Closed Workflow steps - 13 Applications

9

Cancelled

4

Expired

Showing 1 - 10 of 13 Credit Applications

GREENSBORO CC GOLF SHOP

t.gosselin@greensborocc.org

Groups

Division

ECCO

Expired on Apr 10, 2023, 8:04:59 PM

THE PERFECT PAIR

ptpercski@gmail.com

Groups

Division

ECCO ND

Expired on Apr 9, 2023, 8:09:43 PM

The Good Feet Store

matt.robinett@Thegoodfeetgroup.com

Groups

Division

ECCO ND

Expired on Apr 7, 2023, 8:03:56 PM

The Good Feet Store

matt.robinett@Thegoodfeetgroup.com

Groups

Division

ECCO ND

Expired on Apr 7, 2023, 8:03:56 PM

<

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1

2

>

>

10

SOP BILLTRUST AUTOMATED CREDIT APPLICATION

WorkspaceAccountsReporting

Workspace

InvoicingPaymentsCreditClient Connect

Credit Applications List

View ApplicationsAssigned to me

NotesAdd Notes

System10 Apr 2023

Application moved to end of workflow.

System10 Apr 2023

Sent Updates email

System10 Apr 2023

Application moved to Expired.

System08 Apr 2023

Sent reminder email.

System06 Apr 2023

Sent reminder email.

System04 Apr 2023

Sent reminder email.

System02 Apr 2023

Sent reminder email.

Tyler Gosselein01 Apr 2023

Application moved to In Process.

Hugh Bell01 Apr 2023

Sent invitation email.

Hugh Bell01 Apr 2023

Application Initiated.

Reopen

THE PERFECT PAIRptpercowski@gmail.com

GroupsDivisionECCO ND

Expired on Apr 9, 2023, 8:09:43 PM

<12>10