At-a-Glance Reference Guide - Invoice Central

First Time Login

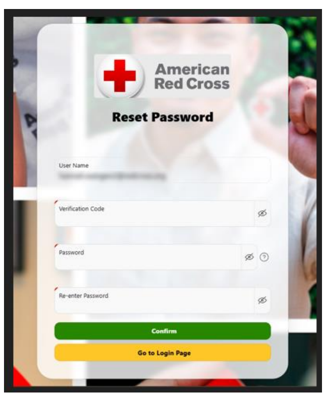
- New user will receive email from noreplyIC@fss.redcross.org
- Click on the **New User Login** link
- Enter the Verification Code provided in the email (Expires after 24 hours)
- Create your password
- Log into Invoice Central
- Review the Electronic Statement Disclosure & Consent Agreement

Password Reset

All users can reset their own passwords.

Main Login Page

- Click on **Forgot/Reset Password**
- Provide your email address to receive an email with Instructions for password reset
- Once the new password has been set up, the user will receive a confirmation email



Profile

- Click on your user email address in the toolbar to get to **Profile**
- Enter New Password
- Re-enter New Password
- Click on the **Change Password** button

Help Button

- Select the **Help** button in the header to access the following:
    - User Guide and Password Reset Instructions
    - Quick Pay Portal link
    - Contact emails for any questions

Notification Settings

- All users can Enable/Disable email notifications themselves by clicking **Notification Settings** in the Header

Statement of Account

- Users can easily view from the Homepage information such as the **Invoice Status, Payment Status, Invoice Date, Amount Due** and **Remaining Amount** for all open invoices
- Users can also view and download open invoices by clicking on the blue hyperlinked invoice number

Customer Search Tile

- Provides general information on any account(s) assigned to the user

Account Activity Tile

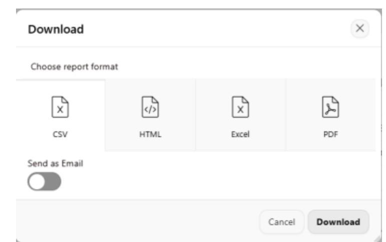
- View Open and Closed invoices
- Download invoices
- Download Invoice Lines into (CSV, HTML, Excel, and PDF)

Downloading Invoices

- Click on the blue hyperlinked invoice number you want to download
- Click on the orange **Download Summary Invoice** (BioMed customers only), or the **Download Detailed Invoice** button

Export Invoice Lines

- In the **Account Activity** tile, locate the invoice you want to export and then click the **View Invoice Lines** hyperlink located in the same row as the applicable invoice
- Go to the **Summary** or **Invoice Lines Detail** section you want to download and click on the **Actions** drop-down
- Click on **Download** and then select your desired report format and click **Download** again.



External Admin Functionality

Instructions for Primary & Secondary Admins only.

Add New User

- Click on the **Manage Users** tile
- Select **Add New Customer User Account**
- Fill out all fields with an asterisk
- Assign **User Role(s)**
- Deselect any **Email Notifications** the user will not need.
- Make any updates to the **Approval Amount Restrictions** (if applicable).
- Assign Account(s) the user should have access to.

Edit User

- Click on the pencil icon in the **Edit** column, next to the applicable user
- Make any necessary changes and click on the **Update Account** button