

THE POWER OF BEING UNDERSTOOD

RSM PAYMENT PORTAL USER GUIDE ABOUT

This guide provides the following steps for clients to view and pay invoices using the RSM Payment Portal:

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- [Using The HighRadius User Interface](#)
- [Paying Invoices](#)
- [Accessing Help](#)

Technical Support: For questions on logging into your account or technical issues, contact RSM Support at (1-833-518-3394) or email at RSMServiceDesk@rsmus.com. Current support hours are 7am-7pm Central time Monday-Friday.

Important: For questions regarding your RSM account, please contact the RSM Accounts Receivable at 608-270-6950 (U.S.) or 647-730-3714 (Canada). Or, email at Accounts.Receivable@RSMUS.com.

DISCLAIMERS

Please note the following:

- **Disclaimer for open invoices:** This portal does not contain invoice copies for any invoice issued before April 16, 2021. Invoice copies can be obtained by emailing Accounts.Receivable@rsmus.com.
- **Disclaimer for closed invoices:** This portal does not contain data prior to April 16, 2021. As such, invoices closed prior to that date are not be displayed on this tab.
- **Disclaimer for payment history:** This tab only displays payments made through this portal. Any payments made directly to RSM will not be reflected here.

USING THE HIGH RADIUS USER INTERFACE

The screenshot shows the RSM Payment Portal interface with several callout boxes:

- Export:** Click to export account details to Excel.
- Closed Bills:** Displays all closed customer invoices.
- Payment History:** Displays the entire list of payments made through the portal by the customer.
- Amount Due:** Amount currently due.
- Home Page:** Provides a summary of your accounts.
- Customer name and address information can be viewed** (points to the Customer Details section).
- Open Bills:** Displays an overview of all open and paid invoices. You can view and pay invoices here.
- Click here to see invoices by buckets and pay those invoice.** (points to the Amount Due By Aging Buckets chart).

The interface includes a navigation bar with 'Exports', 'EIPP', 'Home', 'Open Bills', 'Closed Bills', 'Payment History', and 'Administration'. The main content area shows 'Customer Details', 'Quick Links' (Account Payment, Contact Supplier), and 'Amount Due' summary (Total Past Due, Amount Due: USD -6,063.37, Number of Bills: 1). A 'Review and Pay' button is visible at the bottom right.



ACCESSING THE RSM PAYMENT PORTAL

To access the RSM Payment Portal and bookmark:

- For U.S. go to: <https://clientpaymentportal.rsmus.com>
- For Canada go to: <https://clientpaymentportal.rsmcanada.com>

PAYING INVOICES

The following provide steps to pay:

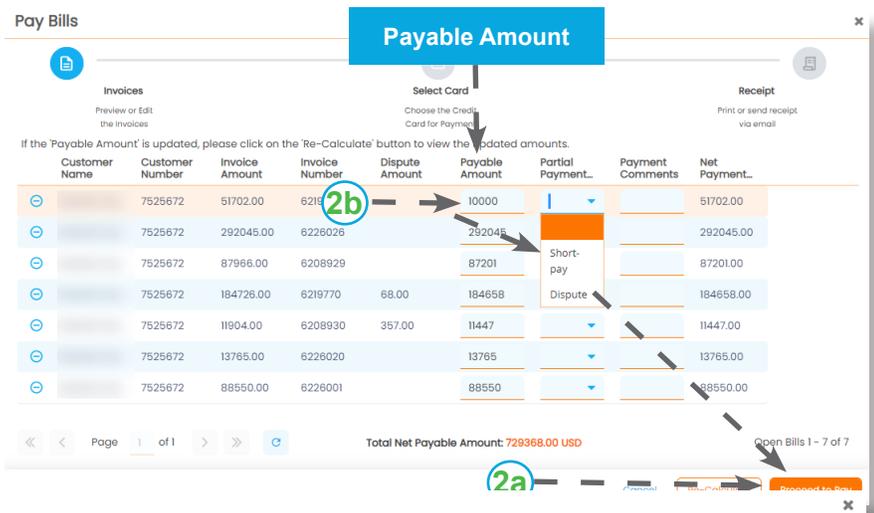
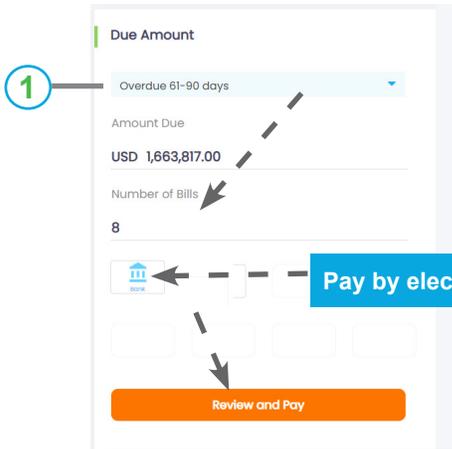
- Amount Due
- [Open Bills](#)

2. You have two options:
 - a. Click **Proceed to Pay** the full amount of the invoice. Or,
 - b. In **Payable Amount**, enter the amount you wish to pay, select **Shortpay** from the **Partial Payment** dropdown and click **Proceed to Pay**.

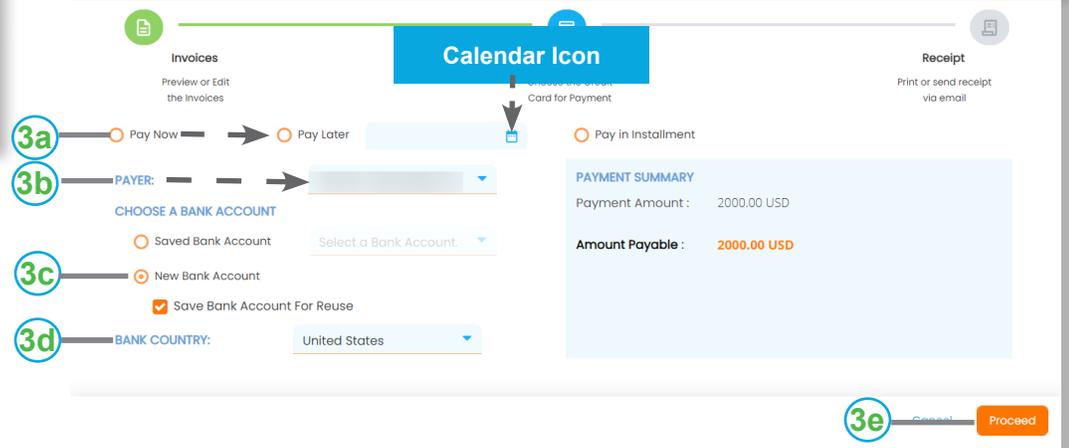
Amount Due

To pay the amount due:

1. Click the **Amount Due** dropdown and select the desired invoice. Select **Automated Clearing House (ACH)** check Click **Review and Pay**.



3. Continue with the following steps:
 - a. Select **Pay Now** or **Pay Later** and click the **Calendar** icon to select a pay date.
 - b. From the **Payer** dropdown, select the required account.
 - c. Click **New Bank** account.



4. Review the Authorization Page, click the **I Accept Terms of Agree** checkbox and click **Pay**.

5. Enter the bank account details and click **Submit**.

6. The invoice payment is made. Click **Print Receipt** if required.

Invoice Number	Paid Amount	Transaction Id	Payment Status	Payment Response Message	Scheduled Date
6219007	10000.00	9KB7KBHF4i	Success	112: Your transaction was suc...	

Open Bills

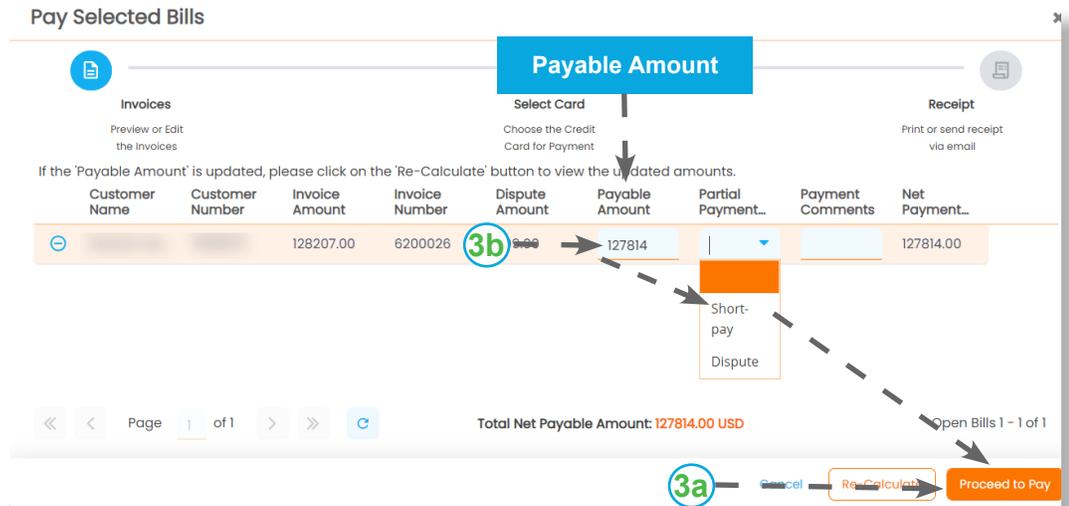
To pay open bill(s):

1. Select the bill(s) to pay.
2. Click **Pay by ACH**. (Automated Clearing House (ACH) electronic check.)

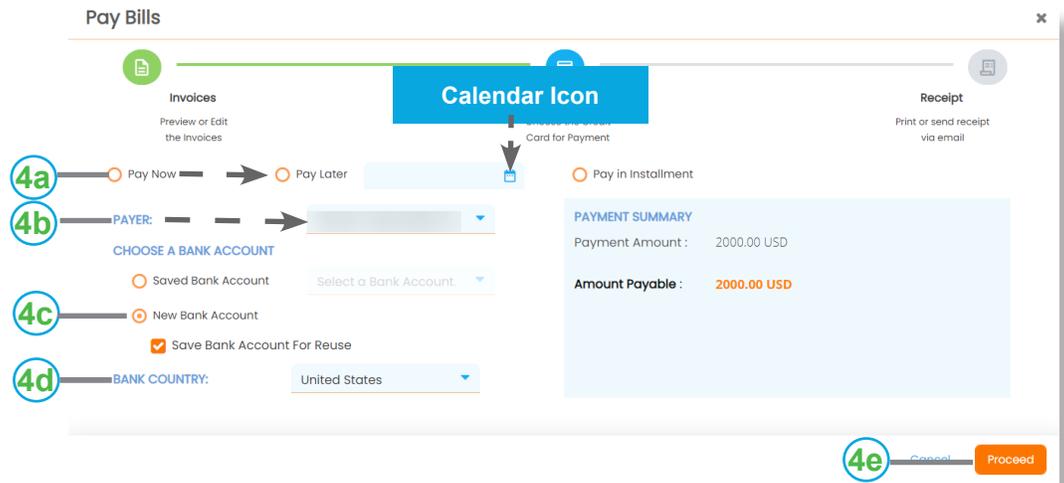
Customer Number	Customer Name	Payment Status
<input checked="" type="checkbox"/> 7525672		Success
<input type="checkbox"/> 7525672		Success
<input type="checkbox"/> 7525672		Success
<input type="checkbox"/> 7525672		Success

Amount	Due Date	Status
4048152.00		
51702.00	51702.00	
292045.00	292045.00	
87966.00	87201.00	
184726.00	184726.00	
11904.00	11804.00	

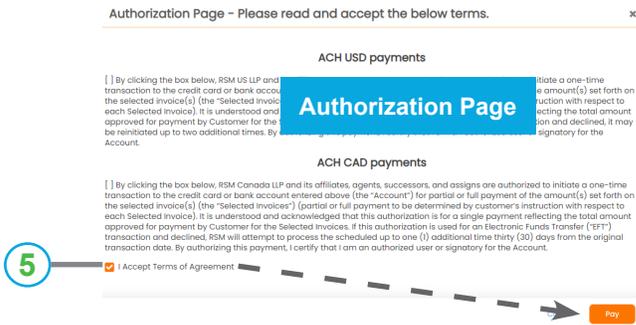
3. You have two options:
 - a. Click **Proceed to Pay** the full amount of the invoice. Or,
 - b. In **Payable Amount**, enter the amount you wish to pay, select **Shortpay** from the **Partial Payment** dropdown and click **Proceed to Pay**.



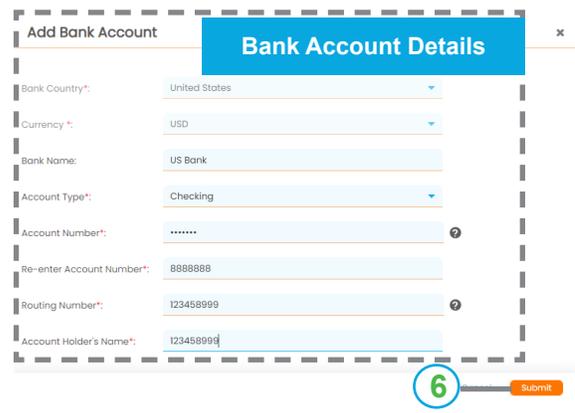
4. Continue with the following steps:
 - a. Select **Pay Now** or **Pay Later** and click the **Calendar** icon to select a pay date.
 - b. From the **Payer** dropdown, select the required account.
 - c. Click **New Bank** account.
 - d. From the **Bank Country** dropdown, select the required country.
 - e. Click **Proceed**.



5. Review the Authorization Page, click the **I Accept Terms of Agree** checkbox and click **Pay**.



6. Enter the bank account details and click **Submit**.



7. The invoice payment is made. Click **Print Receipt** if required.

The screenshot shows the 'Payment Response' page with a table of payment details and a 'Print Receipt' button highlighted with a red circle and the number 7.

Invoice Number	Paid Amount	Transaction Id	Payment Status	Payment Response Message	Scheduled Date
6200026	1000.00	IWHDLMW4...	Success	Successfully added details to...	

Payment Summary
Net Paid Amount:: 1000.00 USD

7 Print Receipt

ACCESSING HELP

The RSM Payment Portal utilizes the HighRadius software interface. After navigating from the Home page, click on the **Help** icon in the lower right corner of that page to access help for that topic.

The screenshot shows the RSM Home Page with various sections like 'Customer Details', 'Quick Links', and 'Amount Due'. A red box highlights the 'Home Page' text.

The screenshot shows the 'Open Bills' page with a table of open bills. A red box labeled 'Help Icon' points to a question mark icon in the bottom right corner.

Customer Number	Customer Name	Payment Status	Invoice Number	Paid Amount	Original Amount	Open Amount	Payable Amount	Company Name	Currency	Debit Credit Indicator	Invo Date
7525672		Open	0	0.00	0.00	-8,063.37	Payable Amount	J&S LLP	USD	Credit	04/1

The screenshot shows a help modal titled 'Overview' with a 'Next' button highlighted by a red box.

Overview
Open Bills provides an overview of all your open and to be paid invoices. You can view and pay your invoices here.

Read more... **Next**

Click Next to view further help details.