RSM PAYMENT PORTAL USER GUIDE

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

• Disclaimers
• Using The HighRadius User Interface
• Paying Invoices
• Accessing Help

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

Export: Click to export account details to Excel.
Home Page: Provides a summary of your accounts.
Open Bills: Displays an overview of all open and paid invoices. You can view and pay invoices here.
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.
Customer name and address information can be viewed.
Click here to see invoices by buckets and pay those invoice.
Paying Invoices

The following provide steps to pay:

- Amount Due
- Open Bills

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.

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.

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.

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
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.

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**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.)
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.

**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.