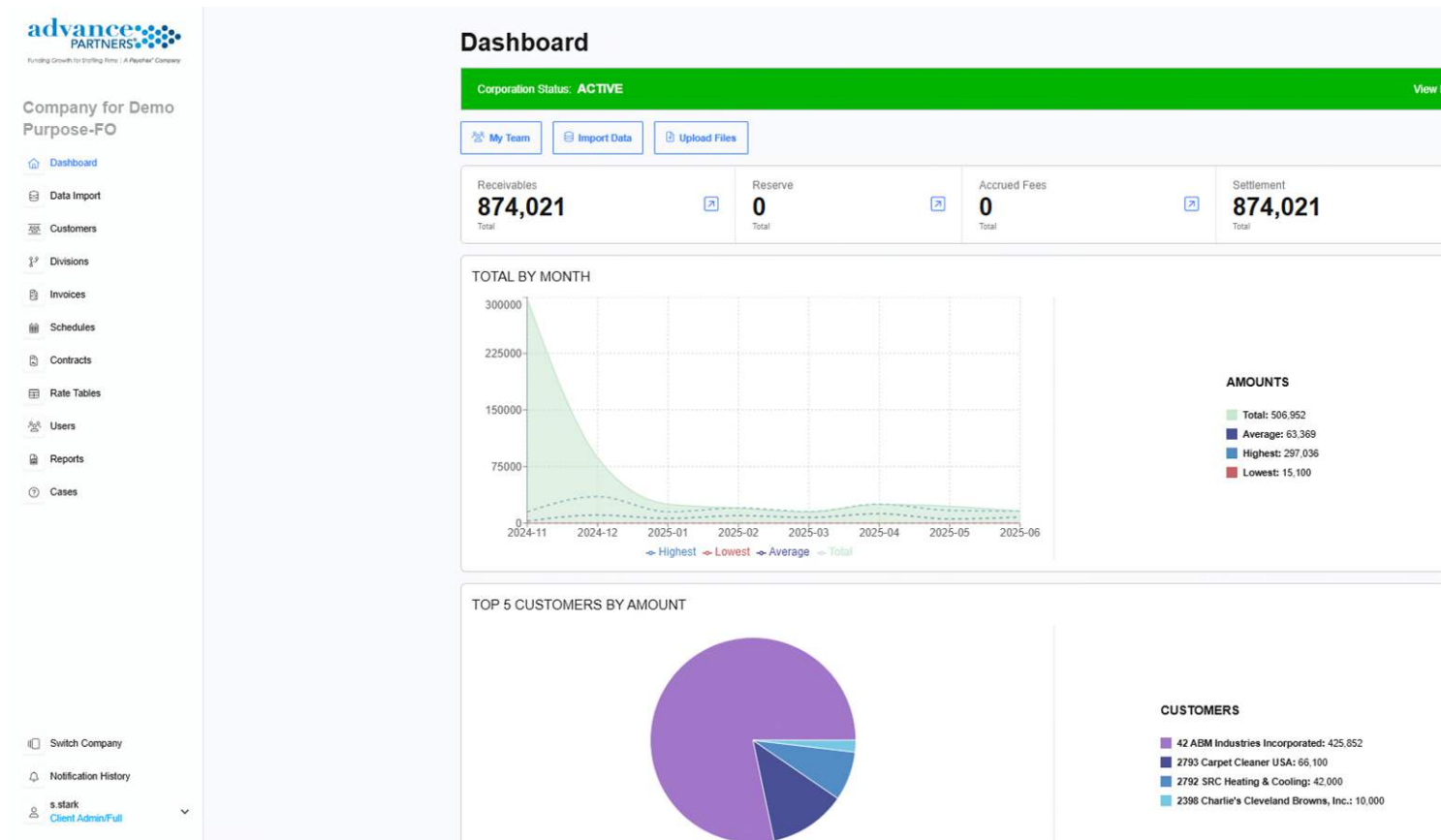


How to Use the Client Portal



Dashboard

My Team – quick access to your Advance Partners team that is supporting you and your business.

Import Data – Import Data takes the user to the import screen for submitting funding (Funding Only Clients)

Upload Files – Easily and securely send Advance Partners files

Receivables – Open AR – click the amount and the supporting report will be generated.

Reserve – Quick access to your Reserve amount. Click on the amount and the supporting report will be generated.

Quick Step

Accrued Fees – These are the fees that have been accrued on your account. Click on the amount and the supporting report will be generated.

Settlement – The current settlement amount with Advance Partners. If you click the amount, the supporting report will be generated.

Total by Month – Color graph to show billings by month

Top 5 Debtors by Amount – Color pie chart for your 5 Debtors

Team – access to your team names and contact information

Along the left you will see menu options

Dashboard – quickly get back to your company dashboard

Data Import – submit funding or adjustments

Customers – View the Customers that have been submitted or already approved. You can also click to add a Customer to the credit portal.

Divisions – quick view of the divisions we have setup for your organization

Invoices – Online view of all invoices previously submitted to Advance Partners plus status.

Schedules – When submitting funding, schedules are created. You may have multiple fundings on one schedule.

Contracts – Access to the details of your contract with Advance Partners.

Rate Tables – Depending on your contract, we can have multiple rate tables and percentages.

Users – Client Portal Users with their access

Reports – 24/7 access to more details and multiple reports you can run when you want them.

Cases – Access Service cases to see status of an existing submission and to also send us new services cases.

Switch Company – If your organization has multiple EINs – you can switch entities.

Notification History – This is a history of communication between Advance partners and your organization.

Log Out – We encourage you to log off when you are finished with the portal so you can easily get back in immediately.

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Quick Step