Buyer Portal Quick User Guide

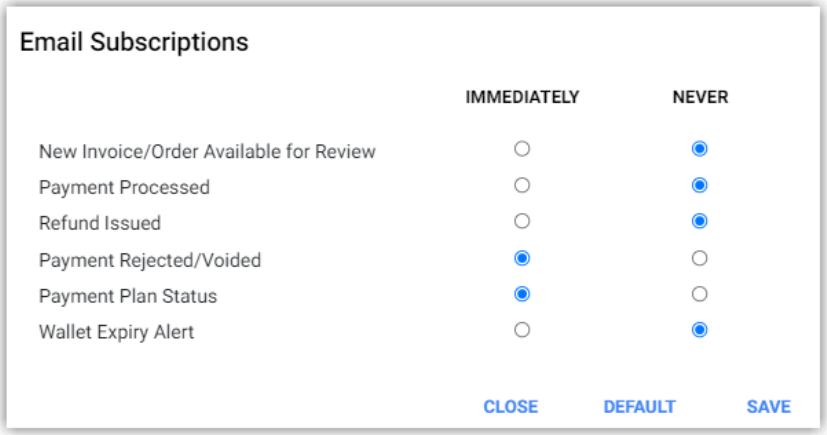
Welcome to *WO Payments Suite.* This short guide will give you an introduction to signing in and submitting payments. For some quick tips, see the Troubleshooting section of this document.

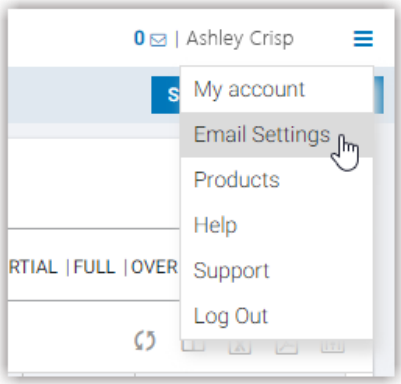
In this document:

- First Sign-In
- Submitting a Payment through the Portal
- Troubleshooting
- Portal UI Overview

First Sign-In

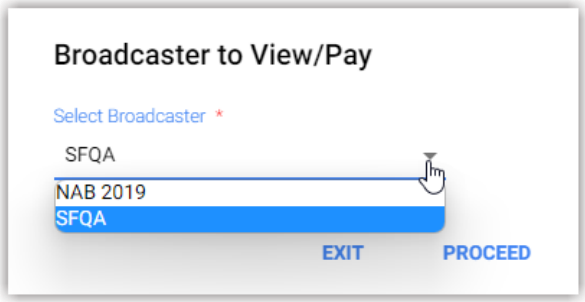
When you log into the system for the first time, the Email Subscriptions pop-up window opens automatically for you to define your preferred settings. Select whether you want to receive an email notification Immediately or Never for each event.



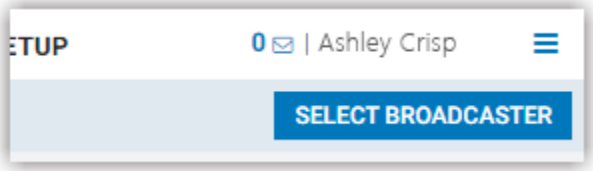


At any time, you can click on your name in the upper right corner and select Email Settings to open the Email Subscriptions box again.

Broadcaster Selection



Every time you sign in, you'll see a pop-up window of broadcasters* with which you are registered to use the *WO Payments Suite*. Select the broadcaster you want to view and pay first, then click **Proceed**. Selecting **Exit** will log you out of the system.



To switch broadcasters, click the dark blue **Select Broadcaster** button in the upper right corner of the screen.

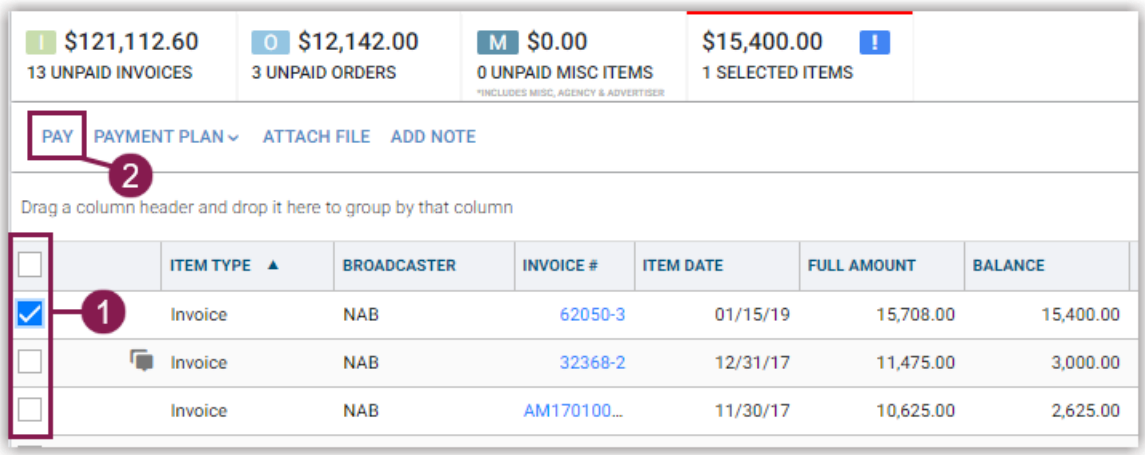
This opens the **Broadcaster to View/Pay** pop-up window, where you can select the next broadcaster on which you wish to work and click **Proceed**.

> Note: If a Broadcaster you work with is missing from the pop-up menu, please reach out to the missing broadcaster to inquire about the *WO Payments Suite*. Our client list is long, but each Broadcaster needs to invite you and you need to register as a user with that Broadcaster for their name to appear in this drop-down list.

Submitting a Payment through the Portal

After selecting a broadcaster, you will land on the **AP Items** tab, where you can view your invoices and/or orders. For an overview of the **AP Items** tab, see the Portal UI Overview section of this document. Below you will find visuals and a step-by-step guide.

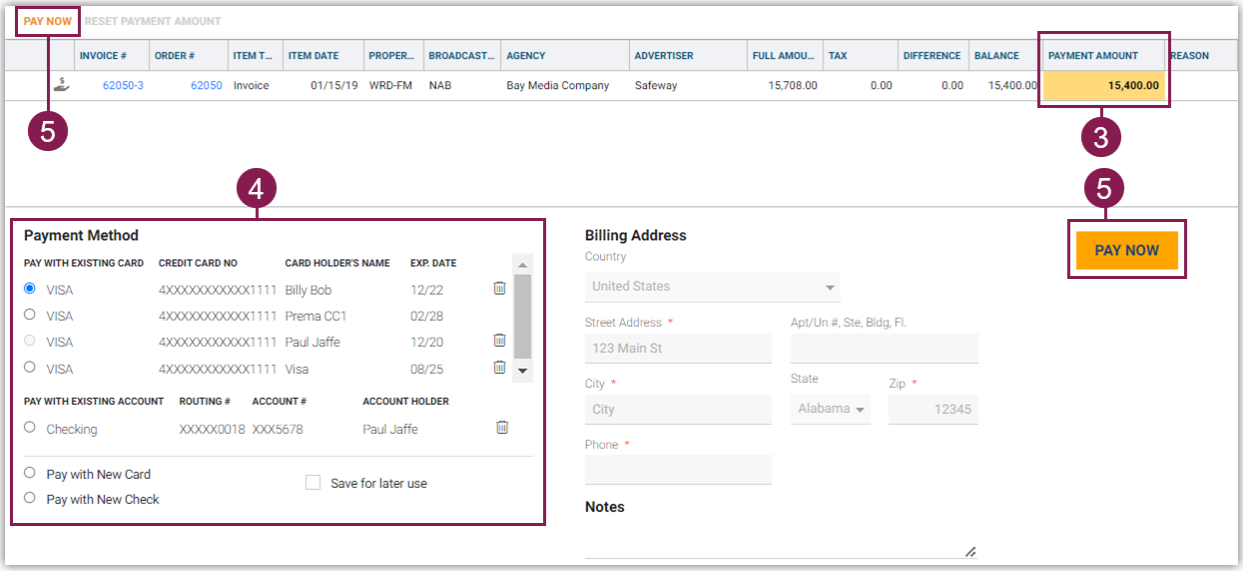
1. Select the items to pay from the list of orders and invoices (1).
2. Click **PAY** (2) in the action bar above the grid.



©2022 WideOrbit Inc. All Rights Reserved.

*Note: If you receive a message titled **Payment Selection Confirmation** when you click **PAY**, which is expected in some circumstances, see the **Troubleshooting** section below for details about the options.*

3. The **Pay Now** screen opens. Confirm or change the **Payment Amount** (3) to the amount you wish to pay for each item. This is where you adjust the payment amount if needed.



Note: Altering the requested amount requires you to select a **Short/Over Pay** reason from the drop-down menu in the **Reason** column.

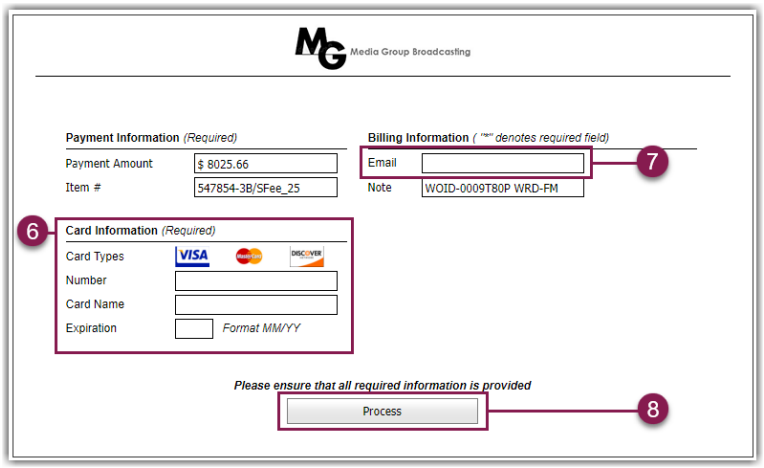
4. Select the **Payment Method** (4) and enter the associated **Billing** information.

   Note: If you wish to securely save this payment method for future use, check the box beside **Save for Future Use**.

5. Click **PAY NOW** (5) to enter your payment information.

   NOTE: If the payment screen does not load, verify your browser's pop-up/content blockers are disabled. Chrome or Firefox are recommended.

6. Enter your credit card or bank account information in the fields provided (6). *All credit card and bank account information is stored in a 142-bit encrypted secure website.*



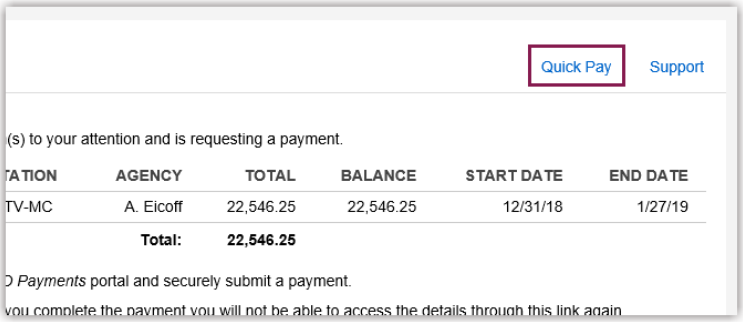
©2022 WideOrbit Inc. All Rights Reserved.

7. Enter an email address (7) to receive an emailed receipt.
8. Click the Process button (8). This action begins the payment authorization and processing of your payment.

After you submit the payment, you will receive a confirmation message where you can choose to print a receipt or email a copy to yourself or to someone else. *(Helpful hint: If you set your notifications to receive payment information, an email is sent automatically.)*

Submitting a Payment Using the Quick Pay Option

There is also a Quick Pay option that lets you submit a payment without signing into the *WO Payment Suites* platform.

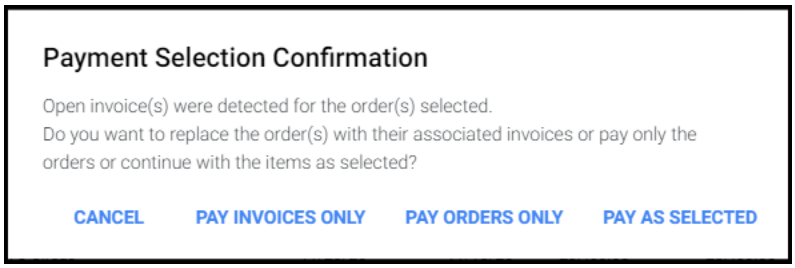


If your broadcaster sends you a request for payment, you will receive an email with the subject line "WO Payments Suite - New request available for processing". In this email, you will find a list of invoices and/or orders the broadcaster is requesting you to pay. To pay using the Quick Pay, click on the **"Quick Pay"** hyperlink at the top right corner of the email. This will take you directly into the Pay Now screen showing the same items listed in the email. Simply select the items for payment and proceed with payment as outlined in the section Submitting a Payment through the Portal above.

Troubleshooting

Seeing a Payment Selection Confirmation Message When You Click Pay?

This message appears when you select an order to pay instead if an open invoice for the same order. Choose one of the three options to move forward to the Pay Now screen:



©2022 WideOrbit Inc. All Rights Reserved.

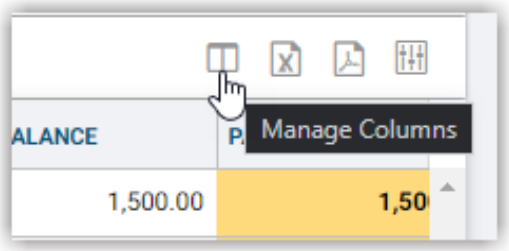
- **PAY INVOICES ONLY** – Replaces selected order(s) with the open invoice(s) related to the order(s). The Pay Screen will show the open invoice(s) only.
- **PAY ORDERS ONLY** – Keeps order(s) as selected. The Pay Screen will show the order(s) only.
- **PAY AS SELECTED** – Makes no changes and opens all selected items in the Pay screen. Caution should be used here as paying both the open order(s) and open invoice(s) can lead to overpayment.

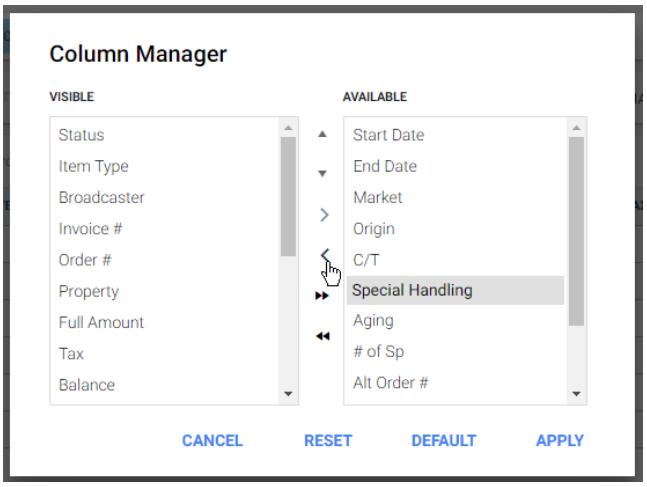
Forgot Your Password?

If you don't remember the password you created for the *WO Payments Suite* platform, click the Forgot Password? link on the sign-in page. Enter your email address in the Request Password Reset box that pops up. You'll get an email from wocentral@wideorbit.com that has a link to a page where you can enter a new password.

Too Many Columns or a Column Is Hidden?

Set your view the way you want by clicking the small gray Manage Columns icon in the upper right to open the Column Manager.

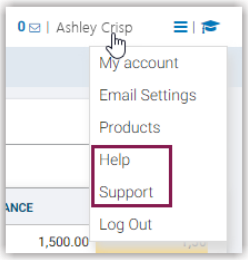




Move the columns you want to see into the Visible list, and columns you don't want to see into the Available list. Click the left and right arrows < > to move the columns between the lists, and the up and down arrows ▲ ▼ to move a selected column up or down in the list. Moving a column up in the Visible list moves the column left in the grid.

©2022 WideOrbit Inc. All Rights Reserved.

Looking for More Information?

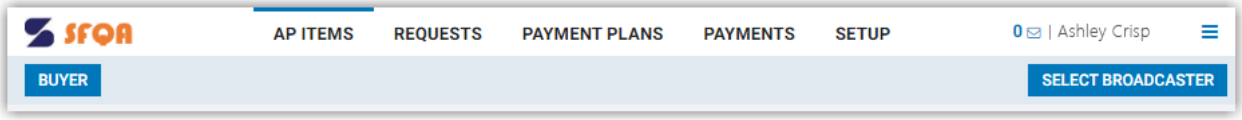


WO Payments Suite online Help is available from every screen by clicking your profile name in the upper right, then clicking **Help**. Click **Support** to open a screen that shows your broadcasters' contact information.

Portal UI Overview

Buyer Portal Work Areas

The Buyer Portal has five main areas, shown as tabs along the top of the screen: **AP Items**, **Requests**, **Payment Plans**, **Payments**, and **Setup**. The active area presently being viewed has a blue bar over the tab; in this image, the currently active area is **AP Items**. Click a tab to switch to a new area.



AP Items

The **AP Items** view is the heart of the Buyer Console, providing a list of your *WO Traffic* and/or *WO Network* transactions, including orders, invoices, and any miscellaneous invoices. The list can be filtered, sorted, and group paneled to show the information that is most helpful to you.

Requests

Requests contains a list of payment reminders sent by broadcasters when payments are due. These items may also be visible in the **AP Items** grid. Please note that broadcasters do not send reminders for every item that is due for payment. These are special requests for items such as Cash-in-Advance orders, past due items, or anything the broadcaster deems necessary.

Payment Plans

For broadcasters who allow **Payment Plans**, this area lists the active, on-going payment schedules established between you and your broadcasters. When a broadcaster wishes to make on-going payment arrangements with your company, you can accept or decline each payment plan before it starts. Once the payment plan begins, you also have the power to cancel the payment plan should your circumstances change. At no time are payment plans forced upon you. These are meant to provide you a flexible way to pay orders and/or invoices.

©2022 WideOrbit Inc. All Rights Reserved.

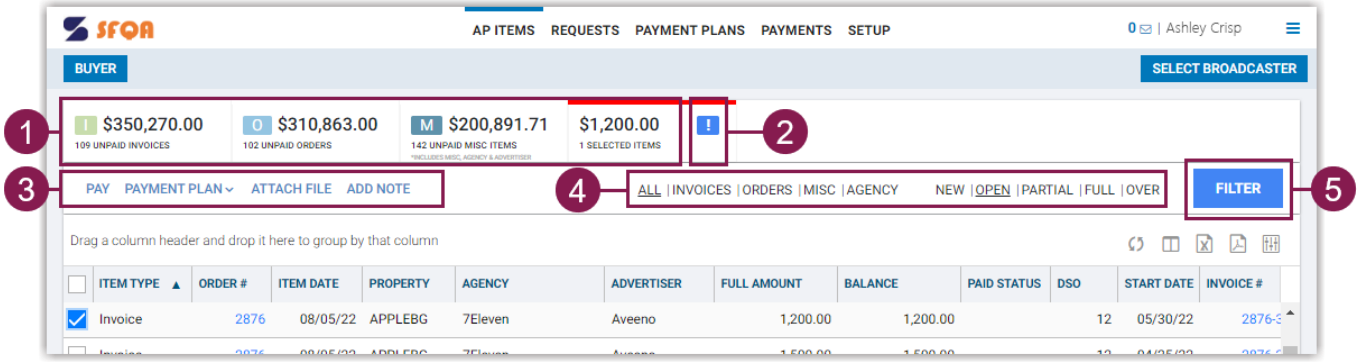
Payments

The **Payments** area lists all payments you have made on behalf of your company. If, for any reason, a payment fails, this page also provides information on reasons for the payment failure. To see the detailed list of items paid with each payment, expand the payment row by clicking the icon.

Setup

Setup is where you manage your online **Wallet** and payment methods.

Summary, Action, and Filter Bars



1	Quick-view summaries of balances.
2	Hover your mouse over the exclamation mark after you select items to see a list of actions that are not available for the items chosen.
3	Actions available to you will be shown in blue. Any item in gray is not available.
4	Quick filters help to reduce the list of items displayed to only those that match the criteria selected. For example, if you wanted to see only new invoices, you would select INVOICES and NEW.
5	Filter screen. This contains a rich set of criteria by which you can define the data you want to see on the screen at any given time. This is very helpful when you are looking for a specific invoice, payment amount, advertiser, etc.

©2022 WideOrbit Inc. All Rights Reserved.