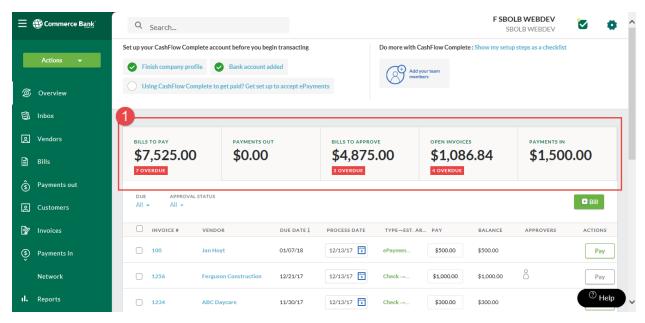# How to Get Paid with CashFlow Complete.

Many small businesses struggle with invoicing and collecting payments from their customers. It can be a manual and time-consuming process. And as the saying goes, time is money. CashFlow Complete will help you to streamline and automate the invoicing process, saving you valuable time that can be reinvested in your business to help you **Pay. Get Paid. Grow.**
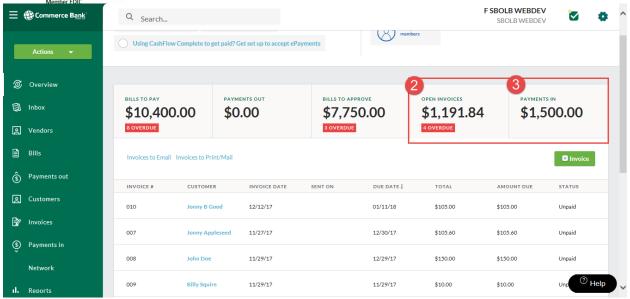
Intro Home Page

We make it easy for you to access CashFlow Complete, which can be done directly through your Small Business Online Banking account. No additional log in credentials are required to access the solution.

The CashFlow Complete homepage is an all-in-one dashboard, giving you a quick reference to view all of your bills and invoices in motion (1). By managing all of your invoices in one place, you can see what invoices are still outstanding and what payments have been received, leading to better transparency of your cash flow (2 and 3).
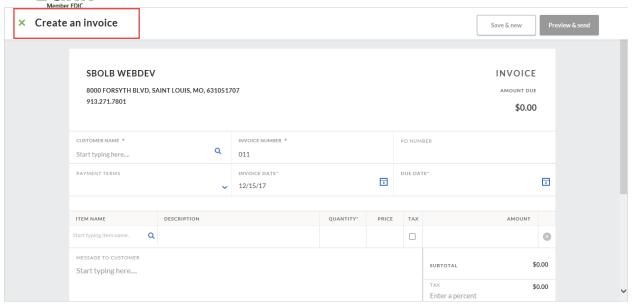
Invoices

CashFlow Complete gives you the ability to create professional invoices which can be emailed directly to your customers. The templates include all of the standard details, but you also have the option to personalize by customer. When the invoice is sent electronically, your customer receives an email notification of the invoice and is then directed to your dedicated payment portal. Through this portal, customers can set up their free account, manage their bank information, and set up an ACH payment directly from their bank account. With the Deluxe or Premium package, you also have the option of accepting credit card payments from your customers, in addition to setting up recurring invoices which can sent automatically. Think about how much time you'll save by receiving electronic payments. No need to make a special trip to the bank just to deposit checks, an no worrying that the checks will clear.
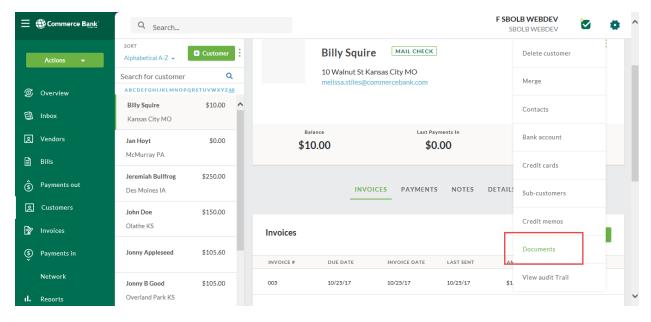
Creating an invoice

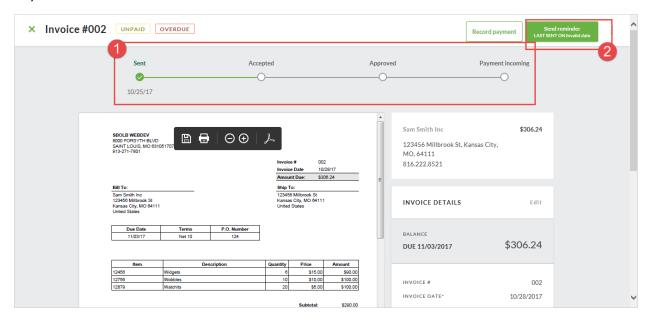**Include screen shot of email notification and payment portal?**

With the unlimited cloud-based document storage, you can store not only your bills and invoices but other project documents, such as estimates and contacts. These documents can be associated with corresponding customers and attached to the emailed invoice for the customer's reference. For example, if you are sending the final bill to the customer for services completed, you could also attach the original estimate, which allows the customer to review and approve that much quicker.

By connecting with your customers through CashFlow Complete, you have the ability to collaborate with them electronically, with all communications documented within the system. You can also track the
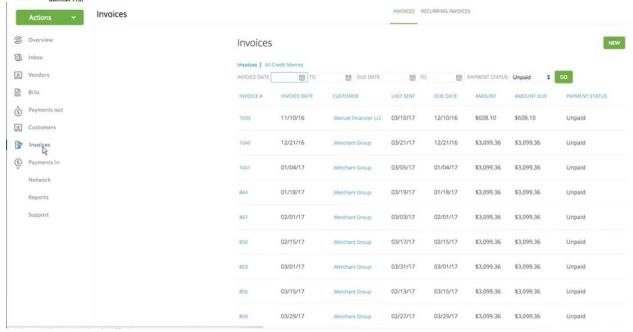
status of the payment, so you know the status of the invoice at every step; whether it's been sent, accepted, approved or paid electronically (1). And if the payment is overdue, you can quickly send a reminder to your customer (2). All of this will help alleviate the burden of having to manually track your outstanding invoices and incoming payments, giving you more time in your day to spend on other parts of your business.

Your entire customer base can be quickly maintained and managed within CashFlow Complete. If you enroll in the Deluxe Invoicing or Premium package, you can sync directly with your accounting software, like Quickbooks, which will automatically pull in all of your customer details. Likewise, any data and information entered in CashFlow Complete will sync to your accounting software, eliminating the need for manual double-data entry.

Closing

Ultimately, an otherwise paper-heavy and time-consuming process is now digitalized for collaboration, 100% traceable for quick and easy reference and anytime, anywhere access allows you to see CashFlow Complete from wherever you are at any point in time.

For more information on pricing or to sign-up, please visit: commercebank.com/cashflowcomplete