



# BILLTRUST CUSTOMER FAQ

# BILLTRUST CUSTOMER FAQ

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## TABLE OF CONTENTS

*Click the text below to jump to the topic*

## PAGE

Enroll in BillTrust

**3**

Remove and Add Users

**5**

Pay Invoices

**6**

Filter and Make Specific Payments

**7**

Save Payment Information

**8**

Link Multiple Customer Accounts  
Under One User

**9**

Define user access

**10**

Login Issues

**11**

# BILLTRUST CUSTOMER FAQ

## HOW DO I ENROLL IN BILLTRUST.COM?

- <http://whitecap.billtrust.com>
- Click on “Sign Up Now” button.

New W-9 forms are now available. Visit [www.whitecap.com/W9](http://www.whitecap.com/W9) to download the new forms. Questions? Contact our team at 1-866-857-0295.

**Sign In To Your Account**

User Name

Password

Remember My User Name

[Forgot Your User Name?](#)

[Forgot Your Password?](#)

Sign In

**Need an Account?**

Sign Up Now

\*You will need your Enrollment token located on your Invoices & Statements

<b>MAKE CHECKS PAYABLE TO:</b>	
White Cap, L.P. P.O. Box 6040 CYPRESS, CA 90630-0040	
<b>TO VIEW AND PAY ONLINE GO TO:</b>	<b>ENROLLMENT TOKEN:</b>
<a href="http://whitecap.billtrust.com">http://whitecap.billtrust.com</a>	MR/128 FMB

# BILLTRUST CUSTOMER FAQ

- Fill out the enrollment information and click Sign Up at the bottom.

**Sign Up With Invoice Gateway** Already Have an Account?  
[Sign In](#)

\*All fields are required unless otherwise indicated as 'optional'

**User Information**  
Enter your full name and email address, then create a user name and password for your account.

Name:  Enter your first and last name here.

Email Address:

User Name:

Password:

Confirm Password:

**Account Information**  
To verify your account, enter your account number along with the enrollment token found on your bill.

Customer number:

Enrollment Token:

**Security Questions**  
Select and answer three security questions.

Security Question 1:

Answer 1:

- An activation email will be sent to you. Click the link in the email to activate the account.
- Click “Return to Sign In” to access your account.

# BILLTRUST CUSTOMER FAQ

## HOW DO I REMOVE AND ADD USERS TO MY ACCOUNT?

- Settings > User Management

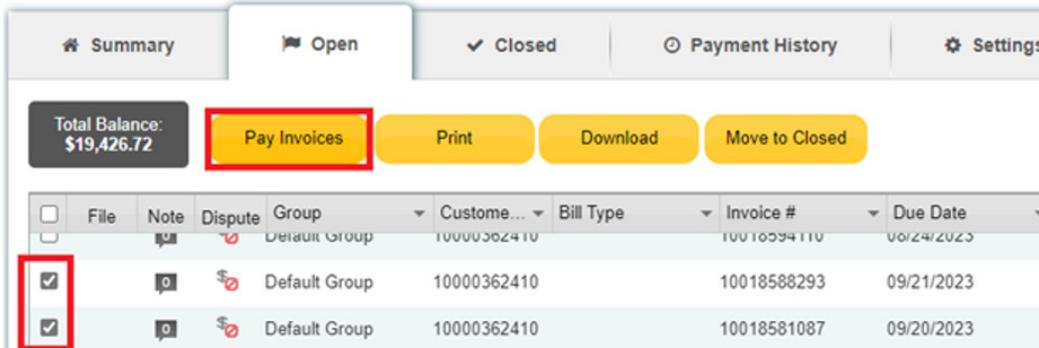
The screenshot displays the Billtrust Customer Management interface. At the top, there is a navigation bar with tabs for Summary, Open, Closed, Payment History, and Settings. The Settings tab is highlighted with a red box. Below the navigation bar is a sidebar menu with options: Profile Settings, Change Password, Payment Settings, Notification Settings, User Management, Account Management, and Group Management. The User Management option is highlighted with a red box. A red arrow points from the User Management option in the sidebar to the User Management section in the main content area. The User Management section has a title 'User Management' and a subtitle 'Setup new users or edit existing ones.' Below this is a table with columns for Name, User Name, Status, and Group. The table is currently empty, displaying the message 'No users have been added yet.' At the bottom of the User Management section, there is a yellow button labeled 'Add New User', which is also highlighted with a red box.

Name	User Name	Status	Group
No users have been added yet.			

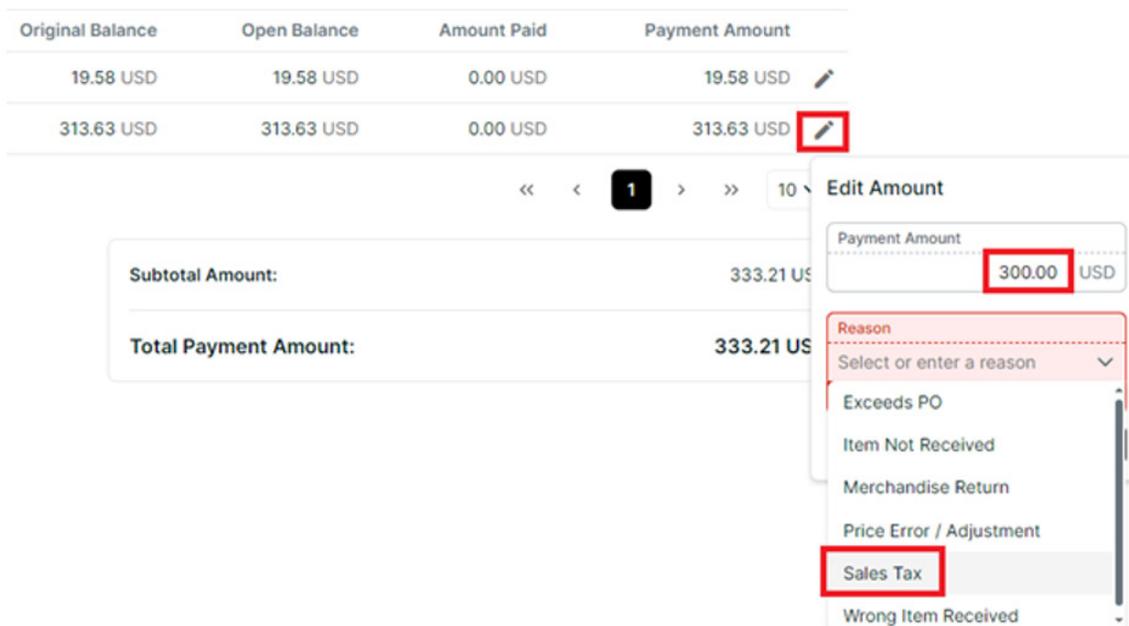
# BILLTRUST CUSTOMER FAQ

## HOW DO I PAY INVOICES?

- Select the invoice(s) you want to pay with the radio buttons
- Click “Pay invoices” then follow the prompts



- If needed, you can send a receipt to a different e-mail or schedule the payment in advance
- To short pay or overpay an invoice, click the pencil icon then enter the new payment amount
- You can select a reason from the drop-down list or enter a custom one



- In Review column on the Open tab displays a “Y” for items in research by our team

# BILLTRUST CUSTOMER FAQ

## HOW DO I FILTER AND MAKE SPECIFIC PAYMENTS?

- Click on Open Tab
- Use the drop arrow filter on any of the headers
- Set your filter parameters (Date, Job, Amount, etc.) and click Apply

The screenshot displays the Billtrust Customer interface. At the top, there are navigation tabs: Summary, Open (highlighted with a red box), Closed, Payment History, and Settings. Below the tabs, there is a 'Total Balance: \$0.00' indicator and four action buttons: Pay Invoices, Print, Download, and Move to Closed. The main area shows a table of invoices with columns: File, Note, Group, Cust..., Bill Ty..., Invoic..., Due ... (highlighted with a red box), P, N..., Inv D..., Inv A..., Disc..., and Disc. A dropdown menu is open for the 'Due ...' column, showing sorting options (Sort Earliest to Latest, Sort Latest to Earliest) and filtering options (All, Last 7 Days, Last 30 Days (selected), Last 90 Days, From: mm/dd/yyyy, To: mm/dd/yyyy). The 'Apply' button at the bottom of the dropdown is also highlighted with a red box.

File	Note	Group	Custo...	Bill Ty...	Invoic...	Due ...	P	N...	Inv D...	Inv A...	Disc ...	Disc
<input type="checkbox"/>			Default Grc 1000			↓ Sort Earliest to Latest			08/01/2023	3564.72	0.00	
<input type="checkbox"/>			Default Grc 1000			↑ Sort Latest to Earliest			08/01/2023	8096.56	0.00	
<input type="checkbox"/>			Default Grc 1000			<input type="radio"/> All			08/01/2023	3564.72	0.00	
<input type="checkbox"/>			Default Grc 1000			<input type="radio"/> Last 7 Days			08/01/2023	8096.56	0.00	
<input type="checkbox"/>			Default Grc 1000			<input checked="" type="radio"/> Last 30 Days			08/01/2023	3564.72	0.00	
<input type="checkbox"/>			Default Grc 1000			<input type="radio"/> Last 90 Days			08/01/2023	8096.56	0.00	
<input type="checkbox"/>			Default Grc 1000			<input type="radio"/> From: mm/dd/yyyy			08/01/2023	3564.72	0.00	
<input type="checkbox"/>			Default Grc 1000			To: mm/dd/yyyy			08/01/2023	8096.56	0.00	
<input type="checkbox"/>			Default Grc 1000			Reset			08/01/2023	3564.72	0.00	
<input type="checkbox"/>			Default Grc 1000			Apply			08/01/2023	8096.56	0.00	
<input type="checkbox"/>			Default Grc 10000001 Statement						08/01/2023	3564.72	0.00	
<input type="checkbox"/>			Default Grc 10000001 Statement						08/01/2023	8096.56	0.00	

# BILLTRUST CUSTOMER FAQ

## HOW DO I SAVE PAYMENT INFORMATION?

- Click on settings tab
- Click on Payment Settings
- You can add, edit, or delete payment information

The screenshot displays the Billtrust Customer FAQ interface. At the top, there are navigation tabs: Summary, Open, Closed, Payment History, and Settings. The user's name, Matthew, is visible in the top right corner. The left sidebar contains a menu with items: Profile Settings, Change Password, Payment Settings (highlighted with a red box), Notification Settings, User Management, Account Management, and Group Management. The main content area is titled 'Payment Settings' and includes a sub-header 'Manage your payment settings and payment accounts.' Below this, there are two tabs: 'Payment Accounts' (selected) and 'Payment Options'. A table lists payment accounts with columns for 'Friendly Name', 'Account Type', and 'Group'. The table contains one entry: 'My Bank Account', 'Bank Account', and 'Default Group'. To the right of this entry is a blue 'Edit Delete' link (highlighted with a red box). At the bottom of the main content area, there are two yellow buttons: 'Add Bank Account' and 'Add Credit Card' (both highlighted with red boxes).

Friendly Name	Account Type	Group	
My Bank Account	Bank Account	Default Group	<a href="#">Edit Delete</a>

# BILLTRUST CUSTOMER FAQ

## HOW DO YOU LINK MULTIPLE CUSTOMER ACCOUNTS UNDER ONE USER?

- Click on Settings Tab
- Click on Account Management
- You can Add, edit, or remove different customer accounts.

The screenshot shows the 'Settings' tab selected in the top navigation bar. The left sidebar contains a menu with 'Account Management' highlighted. The main content area is titled 'Account Management' and contains a table with two accounts. The 'Add New Account' button is located at the bottom of the table. Red boxes and arrows highlight the 'Settings' tab, the 'Account Management' menu item, the 'Add New Account' button, and the 'Edit' and 'Remove' links for each account in the table.

Account	Friendly Name	Group	
10000000062		Default Group	Edit Remove
10000000140	Account 2	Default Group	Edit Remove

\*You will need your Enrollment token located on your Invoices & Statements

<b>MAKE CHECKS PAYABLE TO:</b>	
White Cap, L.P. P.O. Box 6040 CYPRESS, CA 90630-0040	
<b>TO VIEW AND PAY ONLINE GO TO:</b> <a href="http://whitecap.billtrust.com">http://whitecap.billtrust.com</a>	<b>ENROLLMENT TOKEN:</b> 895 128 FMB

# BILLTRUST CUSTOMER FAQ

## HOW DO YOU DEFINE WHAT USERS HAVE ACCESS TO WHICH CUSTOMER ACCOUNTS?

- Click on Settings Tab
- Click on Group management
- Add, edit, or remove groups and which users are in each group

The screenshot displays the Billtrust Customer interface. At the top, there is a navigation bar with tabs for Summary, Open, Closed, Payment History, and Settings. The Settings tab is highlighted with a red box. Below the navigation bar, there is a sidebar menu with various settings options. The Group Management option is highlighted with a red box. The main content area shows the Group Management page, which includes a table of groups and an Add New Group button. The Add New Group button is highlighted with a red box. The table has the following data:

Group Name	Account(s)	Payment Account(s)	User(s)
Default Group	10000000062	My Bank Account	<a href="#">Edit</a> <a href="#">Remove</a>

# BILLTRUST CUSTOMER FAQ

## I'M TRYING TO ENROLL BUT RECEIVE A MESSAGE THAT THIS ACCOUNT WAS ALREADY ENROLLED?

- Your company may already have a Billtrust account
- You can use the “Forgot Your User Name” feature on the login page:

### Sign In To Your Account

User Name

Password

Remember My User Name

[Forgot Your User Name?](#)  
[Forgot Your Password?](#)

Sign In

- If this doesn't work, contact [Billtrust@whitecap.com](mailto:Billtrust@whitecap.com) to help you complete registration or reset your company's account

## I HAVE A WHITE CAP ACCOUNT BUT THE USER NAME/EMAIL ADDRESS CANNOT BE FOUND?

- WhiteCap.com and White Cap Billtrust logins are now separate
- If you previously viewed invoices or made payments through WhiteCap.com, click “Forgot Password” to create a new password and use your account number as your username

### Forgot Your Password?

Enter the User Name and the email address used to enroll your Invoice Gateway account to begin the process of resetting your password.

User Name:

Email Address:

Cancel

Next

- If this doesn't work, contact [Billtrust@whitecap.com](mailto:Billtrust@whitecap.com) to provide you with your login information or reset your account