



WILBUR-ELLIS®

Ideas to Grow With™

CUSTOMER ONLINE PORTAL FREQUENTLY ASKED QUESTIONS



Wilbur-Ellis Customer Online Portal Frequently Asked Questions (FAQ)

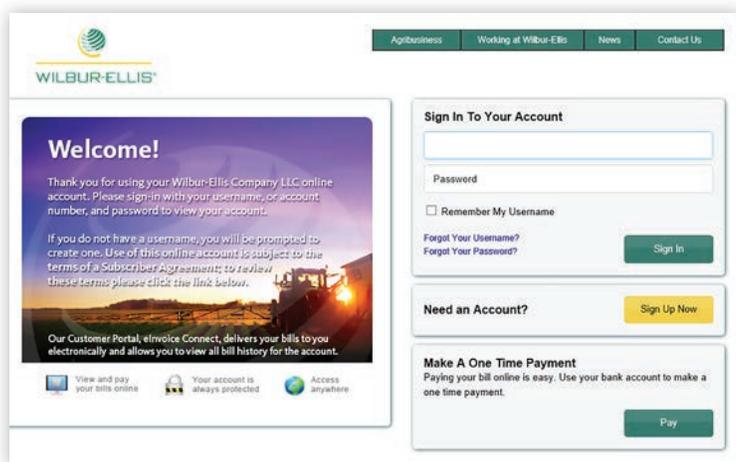
What is the Wilbur-Ellis Customer Online Portal ?	3
How do I get access to the portal?	3
What do I need in order to create an account?	3
Where do I find my "Enrollment Token"?	3
Do I need anything else to create my account?	3
What can I do once I have logged in to the portal?	4
What information will I see when I first log in to the portal?	4
How much history is available for me to view?	4
What options do I have for receiving my Wilbur-Ellis billing documents?	5
What happens when I make a payment online?	5
Can I pay my account with a credit card?	6
Can I pay multiple/related accounts at the same time on the portal?	6
Can I use my prepayment credit to offset my payment?	6
How long will it take for my payment to be applied to my account?	6
What is the latest time or day that I can pay online and still receive my discount?	6
What is the latest day I can pay online and not be charged a Delinquency Fee?	6
What is the cutoff time for my payment to be applied by the last day of the month?	7
Is there a charge to me for using this service?	7
Is there a mobile app for the portal?	7
Which Internet browsers will the portal work on?	7
Will the portal work on all the common operating systems?	7
How secure is the portal?	7
Who should I contact regarding my access to the portal?	7
Who should I contact regarding a billing document that I have received through the portal?	7

What is the Wilbur-Ellis Customer Online Portal?

- This is an online customer portal, via the Internet, that will provide you, our customer, with access to view, download, print and email any of your Wilbur-Ellis billing documents (statements and invoices) and will allow you to make your invoice payments online. You will also be able to elect to receive your statements and invoices automatically by email, rather than waiting for standard mail delivery of your documents.

How do I get access to the portal?

- Use the link: viewaccount.wilburellis.com to access the log-in page to the **Wilbur-Ellis Customer Online Portal**. The following screen will be displayed:



- If this is your first time accessing the site, you will need to create your account using the “Sign Up Now” option.
- If you have already created your account, you can log in by entering your User Name and Password, then click “Sign In”.

What do I need in order to create an account?

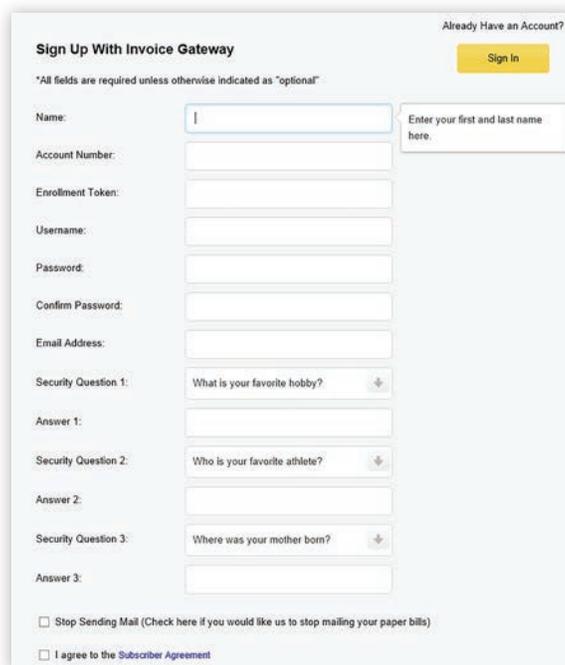
- In order to enroll in the **Wilbur-Ellis Customer Online Portal**, you will need your **Enrollment Token**, which is an identifier that is unique to your account, and your Wilbur-Ellis **customer account number**.

Where do I find my “Enrollment Token”?

- Please contact your local Wilbur-Ellis branch, and they can provide you with the “Enrollment Token” that is required to create your account.

Do I need anything else to create my account?

- You will need to enter your name and email address, and will need to establish a User Name and Password. You will also need to answer three Security Questions. These are established to protect your identity and to prevent unauthorized access to your account.



What can I do once I have logged in to the portal?

- You can view, print and download your Wilbur-Ellis billing documents.
- You can see the balance due on each of your invoice documents.
- You can download your invoice detail into various file formats, including PDF, Quickbooks, Peachtree and CSV.
- You can make a payment online for your open invoices. (ACH payments only. Authorization to debit directly from the your checking or saving account.)
- You can make a one-time payment 'On Account' that is a lump sum amount that is not designated for specific invoices.
- You can view your online payment history.
- You can opt in to receive an email notification when an invoice becomes available. This can also include an attached PDF copy of the billing document. This ensures you have your billing information from Wilbur-Ellis as quickly as possible.
- You can set up your bank account information to be used for future payments.
Note that this information is secure and the bank account numbers are suppressed.
- You can opt in to receive a confirmation message when your payment has been sent.
- You can add additional users that can access the account. Each user can be granted different rights and permissions for the account.
- You can link multiple accounts so all of your documents can be viewed together, without having to sign on to each account separately.

What information will I see when I first log in to the portal?

- All Wilbur-Ellis generated billing documents will be displayed on the portal. This includes invoices, monthly statements, credit memos, prepayments, unapplied cash entries and finance charge notices.



- There are also many attributes about each billing document that are displayed, including the Invoice #, Billing Type, Sales Order #, PO # (if used), Discount Information (if available), Invoice Due Date, Invoice Amount and Open Amount. These fields are displayed in the grid of the portal.

Note: Depending on the size of your monitor, you may need to resize the columns in order to display the full column heading. To do this, grab the right hand side of the column and drag it to the right (as if resizing a column in Excel) until you have the full header displayed as needed.

How much history is available for me to view?

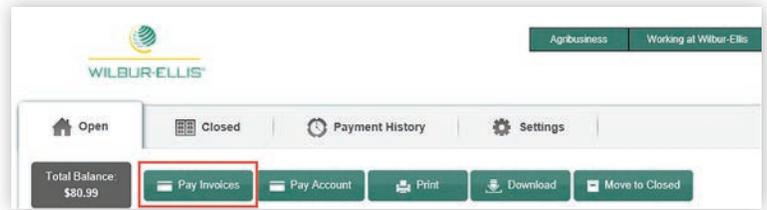
- We have loaded 24 months of historical information for your reference (dating back to November 2013). When you initially log in and are first setting up your account, all of these documents will be displayed under the 'Open' tab for your account. Once your account has been set up, a process will run automatically to move all of your documents with a zero open balance to the 'Closed' tab so the next time you log in, the documents with a zero balance will be displayed as 'Closed'. Alternatively, you can move them all manually by selecting the documents you want to move, and then select the 'Move to Closed' tab.

What options do I have for receiving my Wilbur-Ellis billing documents?

- You have the option to receive your billing documents electronically, which will include an email message that the billing document is available, brief information about the invoices available (invoice number and amount) and a link to the **Wilbur-Ellis Customer Online Portal** so you can log in and view the specific details and/or download their documents as needed.
- You will also have the option to have a PDF copy of the billing document attached to your email notification (rather than just a link to the site).
- If you elect not to receive your billing documents electronically, they will still be printed and mailed.
- If you have linked two or more accounts and they have all been set up to receive invoices and statements automatically, if the same email address is used for both accounts, all billing documents will be combined in the same email notification.

What happens when I make a payment online?

- When initiating an online payment, select the invoices to be paid and select the 'Pay Invoices' button.



- This will take you to a Payment Authorization screen where the details of your payment are displayed. You can also schedule the payment for a future date from this Payment Authorization screen. Once you have reviewed and confirmed your payment details, click 'Next' to proceed to the Payment Confirmation screen. If you wish to make changes to your payment, click 'Cancel' to go back to the prior screen.
- If your payment is made before 12:00 pm Pacific time, that payment information will be sent to Wilbur-Ellis the same day. If the payment is made after 12:00 pm Pacific time, the payment will be sent to Wilbur-Ellis the next business day. Note that payments initiated over a weekend will be processed on the next business day.
- All payments must be made against specific invoice documents. Statements cannot be paid online as a standalone document, but all associated invoices will be available to make a payment against.
- Multiple invoices can be selected at one time, and the system will calculate the amount of the payment to be sent based on the total of all invoices you have selected.
- All invoices must be paid in the full amount due. The online payment process will not allow a partial payment to be made against an invoice.
- Service charge payments can be included in your payment total as well.
- Please allow up to two business days from the payment date for your online payment to be reflected on your account balance. The **Wilbur-Ellis Customer Online Portal** includes this message as well.

Can I pay my account with a credit card?

- Credit cards are not accepted for payment through the Wilbur-Ellis Customer Portal. All payments must be initiated using an ACH debit from your checking account.



Can I pay multiple/related accounts at the same time on the portal?

- Yes, if your accounts have been 'linked' by you within the portal, a payment can be made that will cover multiple accounts with a single payment.

Can I use my prepayment credit to offset my payment?

- You will have visibility to your prepay balance but will not be able to use a prepay credit to offset an invoice. This is because a prepayment is generally reserved for specific products and/or transactions and needs to be managed and applied by the local branch in order to ensure the integrity of the prepayment process.
- You will also be able to view any 'Unapplied Cash' entries on your account but will not be able to use these to offset an invoice. These entries are managed internally by Accounts Receivable and the branch, and although they do represent unapplied money on your account, there are various reasons this can occur so it is critical that these amounts are managed internally. Please contact your local branch with any questions.

How long will it take for my payment to be applied to my account?

- If a payment is initiated before 12:00 pm Pacific, the payment information will be sent to Wilbur-Ellis that same day. If a payment is initiated after 12:00 pm Pacific, the payment information will be sent to Wilbur-Ellis the next business day.
- **You should allow up to two business days from the scheduled payment date for a payment to be reflected on your account and your account balance to be updated.**
- Note that payments initiated on a non-business day (weekend or holiday) will be processed on the next business day.

What is the latest time or day that I can pay online and still receive my discount?

- You will not be able to take your discount if it is past the discount due date. You will have until 12:00 pm Pacific on your discount due date to make a payment and still be able to apply the discount amount.

What is the latest day I can pay online and not be charged a Delinquency Fee?

- If the payment is made by the payment due date, a Delinquency Fee will not be assessed.

What is the cutoff time for my payment to be applied by the last day of the month?

- Payment should be initiated online three **business** days prior to the end of the month in order to ensure that the payment is applied to your account by the last day of the month.

Is there a charge to me for using this service?

- There is **no cost** to you for using this service. This is a service to you, as our customer, to allow online access to your billing documents and to support online payments. Please note that some banks may charge a small fee for ACH debits from your checking account. If this occurs, this is not a Wilbur-Ellis charge, but is something initiated directly through your bank.

Is there a mobile app for the portal?

- No, there is no mobile app for the **Wilbur-Ellis Customer Online Portal** at this time. However, you should be able to access the portal from a tablet using the regular URL link.

Which Internet browsers will the portal work on?

- The supported browsers are:
Internet Explorer (version 11.0),
Mozilla Firefox and Google Chrome.

Will the portal work on all the common operating systems?

- This is a web-based application that will work on Windows-based PCs and Mac operating systems.

How secure is the portal?

- Your information is protected with the highest level of encryption available. You can be assured that your information is safe. The website is PCI Level 1 Compliant and SSAE 16 Certified. They are the most stringent certifications to ensure your data is secure. This is comparable to the security that banks use to provide customers access to their online banking accounts.

Who should I contact regarding my access to the portal?

- Contact your local branch if you would like information about how to enroll in the **Wilbur-Ellis Customer Online Portal**.

Who should I contact regarding a billing document that I have received through the portal?

- Contact your local branch if you have customer service or delivery questions regarding an invoice.

Who should I contact regarding a specific issue related to the portal?

- Contact **customer@wilburellis.com** if you have specific questions regarding the website.



ag.wilburellis.com

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