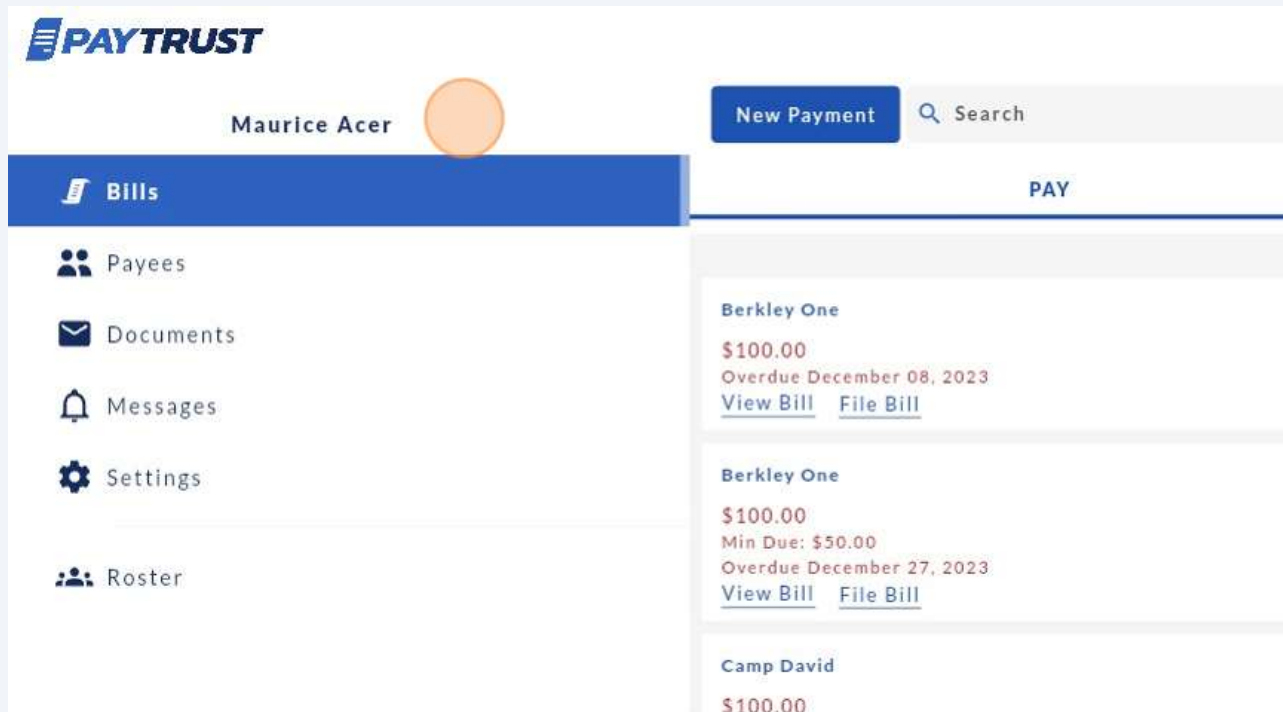# Navigating the New Paytrust Client App

1 To the left of the homepage, you will see a column with a list of tabs that will allow you to view certain items and perform specific actions in your account.


ⓘ The following section provides only a brief overview of the different tabs of the Paytrust Mobile Web Portal.

If you would like a more in-depth tutorial about the possible functions on your account, please refer to the other How To Tutorials available.

2

Bills: Here, you can view a list of unpaid bills and ebills retrieved from your payees. You can also make or cancel payments, and view the statuses of your bills.
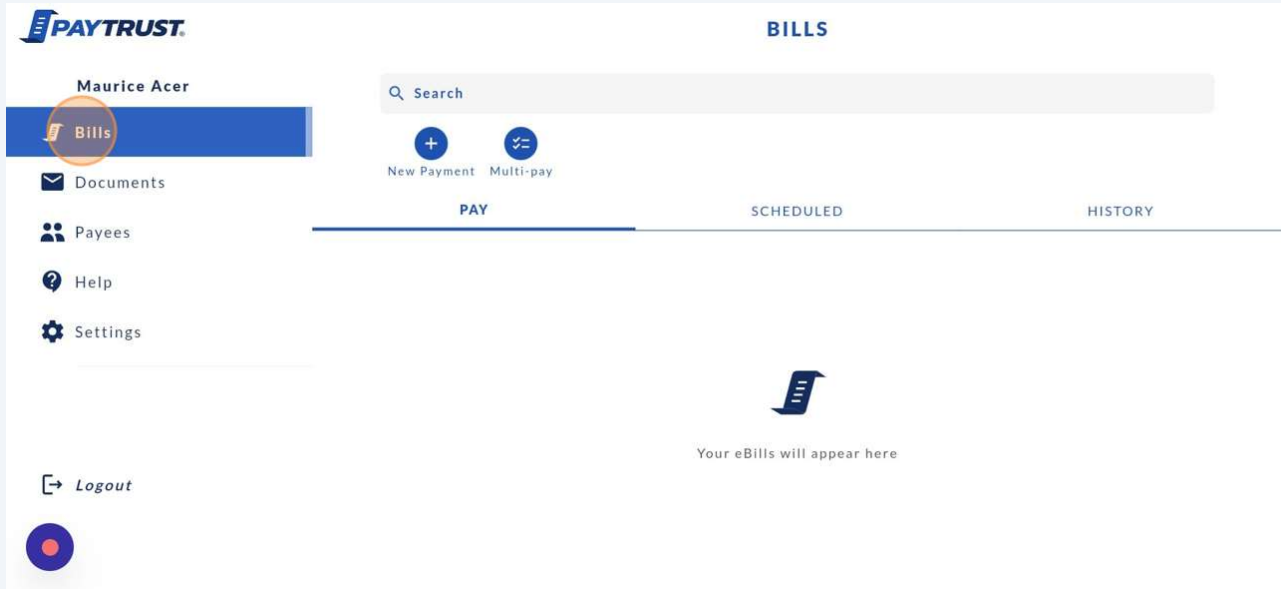
3

Bills: The "Pay" tab shows any unpaid bills that have uploaded to your account. You can also find those bills under the respective Payee, but can only make a payment on this tab. To pay a bill that is listed in the Pay tab, click the "Pay" button on the right side opposite the bill you want to pay. To schedule a one-time payment without a bill, click the "New Payment" button at the top of the Pay tab.
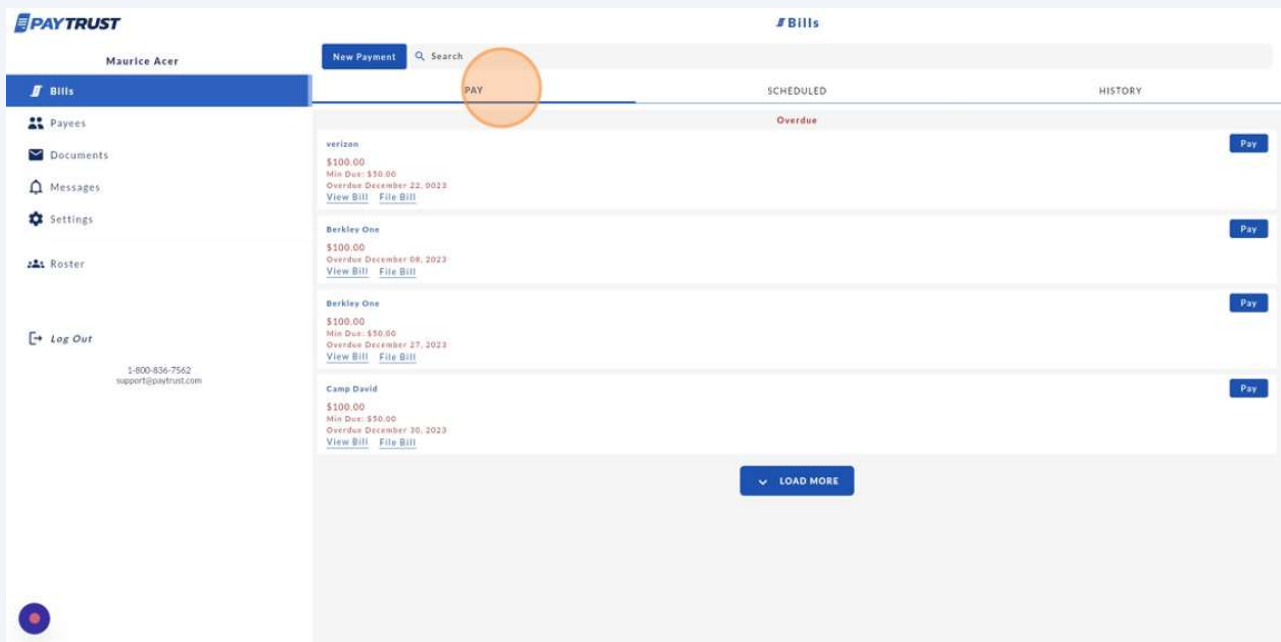
4 **Bills:** The "Scheduled" tab shows all the payments that are scheduled, including those that you made as manual, one-time payment, and those that were scheduled from your autopay rules. You can also "Cancel" a scheduled payment by clicking the "Details" underneath the payment you want to cancel.
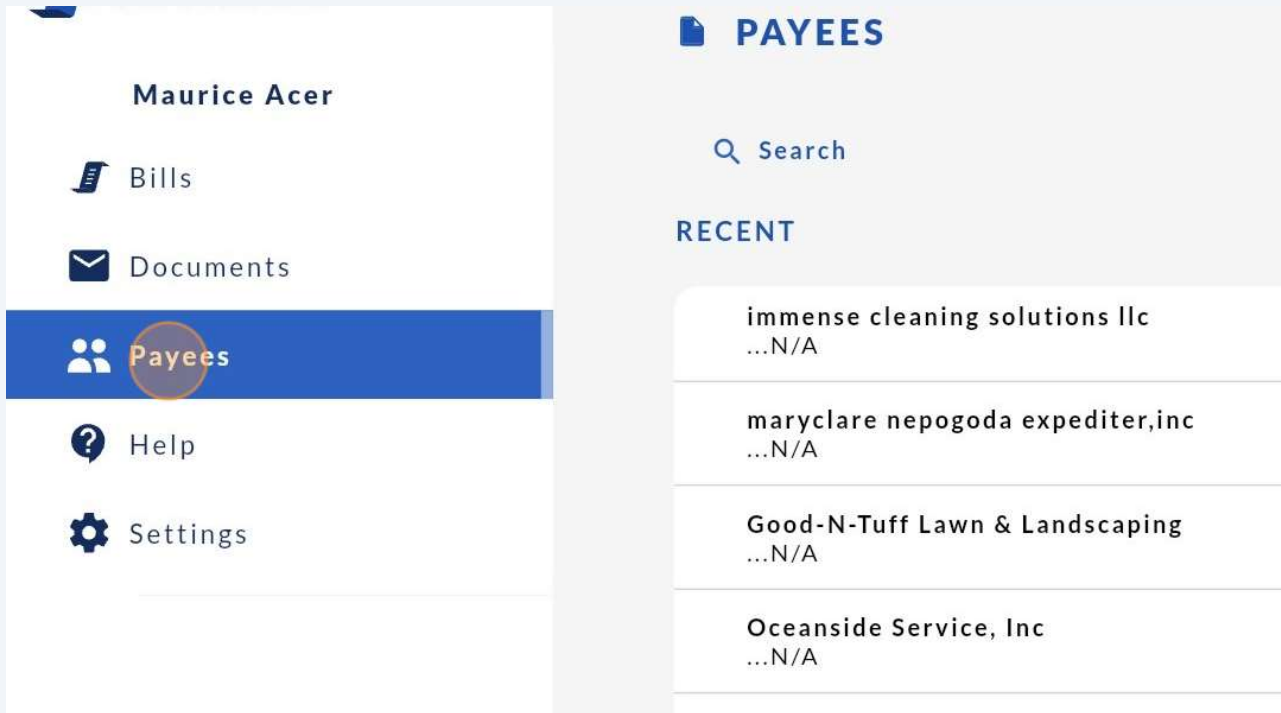

5 **Bills:** The "History" tab shows all payments you made through your Paytrust account for the last 7 years. Payments designated cancelled were previously scheduled but cancelled prior to the processing date.
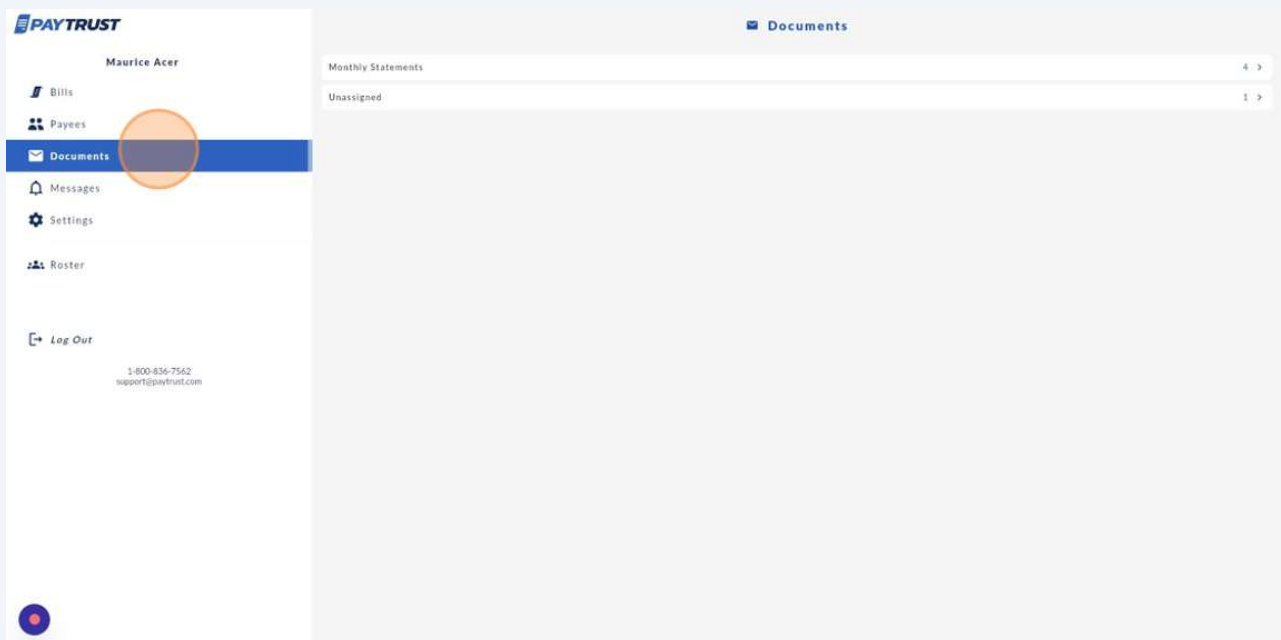
6   **Payees:** In this tab, you will be able to view all active accounts for businesses and people that you pay through Paytrust. In addition, you may sort and search for payees, add new payees, edit existing payees, view payee details such as bills or notices, make payments for a specific payee, hide or permanently delete payees, set up eBills for eligible payees, and create and update your payees' autopay rules.

Maurice Acer

- Bills
- Documents
- **Payees**
- Help
- Settings

📄 **PAYEES**

🔍 Search

RECENT

immense cleaning solutions llc
...N/A

maryclare nepogoda expediter,inc
...N/A

Good-N-Tuff Lawn & Landscaping
...N/A

Oceanside Service, Inc
...N/A

7   **Documents:** On this tab, you will be able to view your Monthly statements, showing all transactions made through Paytrust each month. You will also be able to view and assign any unassigned documents such as bills or notices.

PAYTRUST

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- Bills
- Payees
- Documents
- Messages
- Settings
- Roster

Log Out

1-800-836-7562
support@paytrust.com

📧 Documents

Monthly Statements	4 >
Unassigned	1 >

8 **Messages:** On this page, you can view important notifications regarding your bill payments, payee accounts, and profile updates, all in one place.

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🗒 Bills

👥 Payees

✉ Documents

🔔 **Messages**

⚙ Settings

👥 Roster

Account Mary Nepogoda info changed
10/31/23 04:37PM

Account josette ades - test info changed
10/31/23 04:33PM

Account josette ades - test info changed
10/31/23 04:33PM

Account WaterOne info changed
10/30/23 09:35PM

Account WaterOne info changed
10/30/23 09:34PM

9 **Settings:** Here's where you can view and update your User Profile, such as your email address, address, and phone number. You can also view your Funding Accounts and designate which will be the default account.

🗒 Bills

✉ Documents

👥 Payees

❓ Help

⚙ **Settings**

➡ *Logout*

Funding Accounts

Contact Information

Alerts

Email Preferences

Security

Change Password

About the App

Terms of Service

Private Policy

Logging Out

10 To **Logout** of the Paytrust Mobile Web App, click "Logout" at the bottom of the menu.