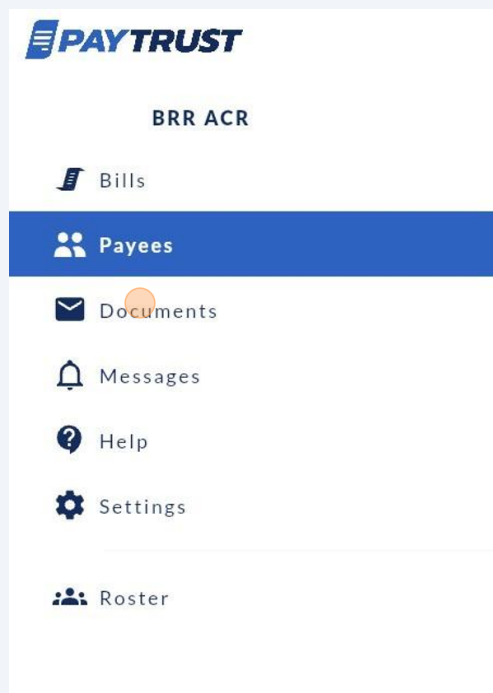


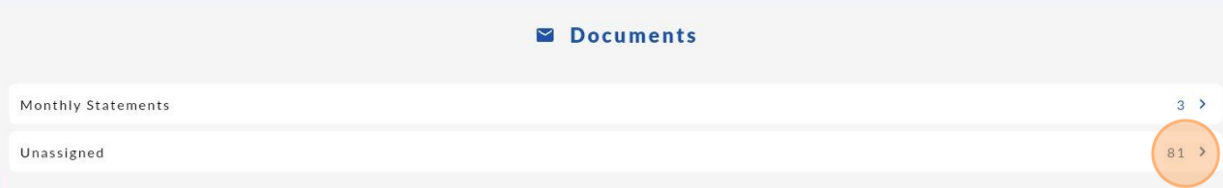
How to Assign Unassigned Bills and Notices

1 Log in to Paytrust.Silverbills.com

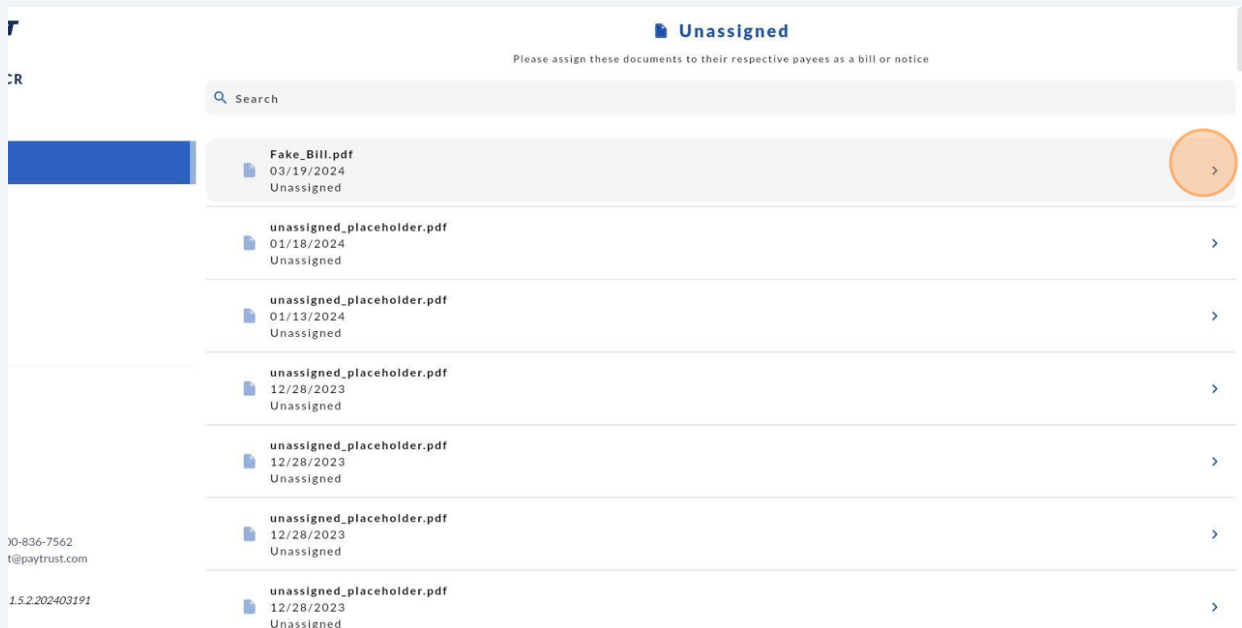
2 Click the "Documents" tab.



3 Click the arrow next to "Unassigned."



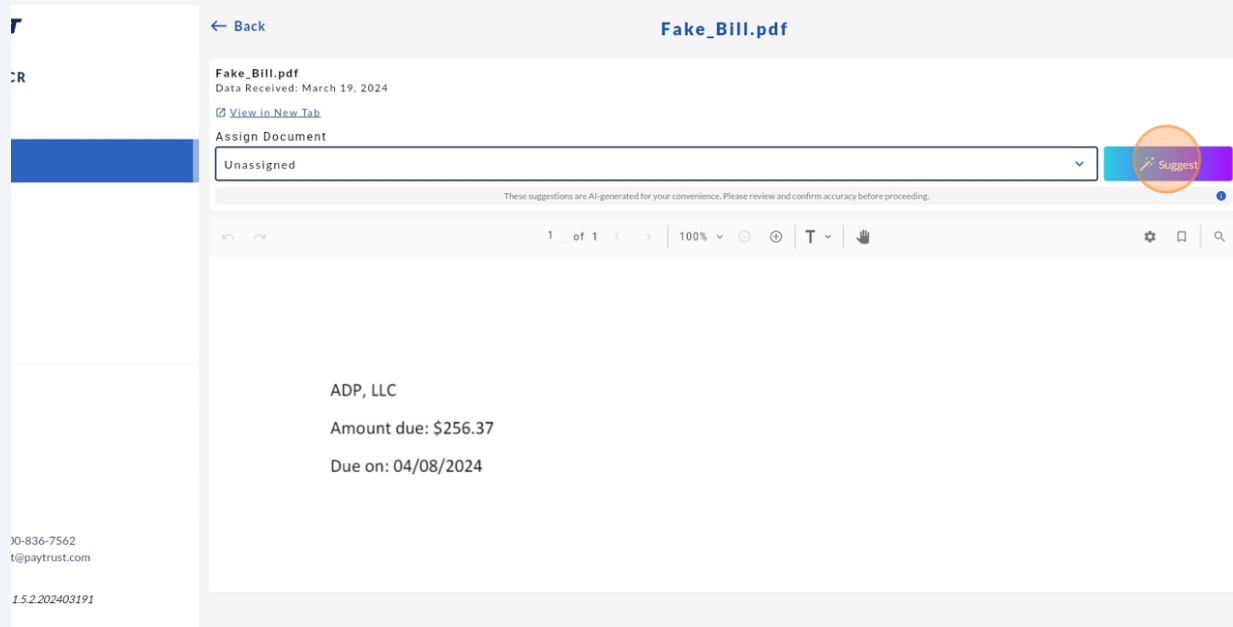
4 Find the bill or notice you would like to assign and click the arrow to the right of the document details.



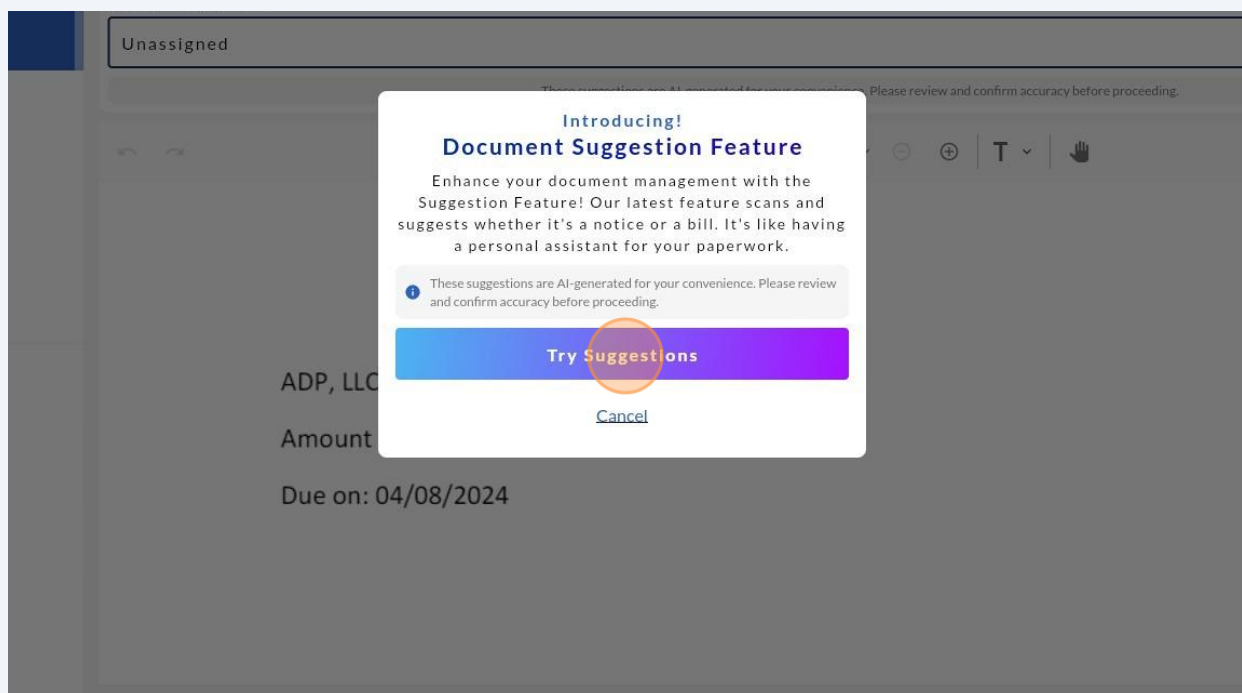
Assigning Documents with AI

5 You will be able to see the bill from the window you are assigning.

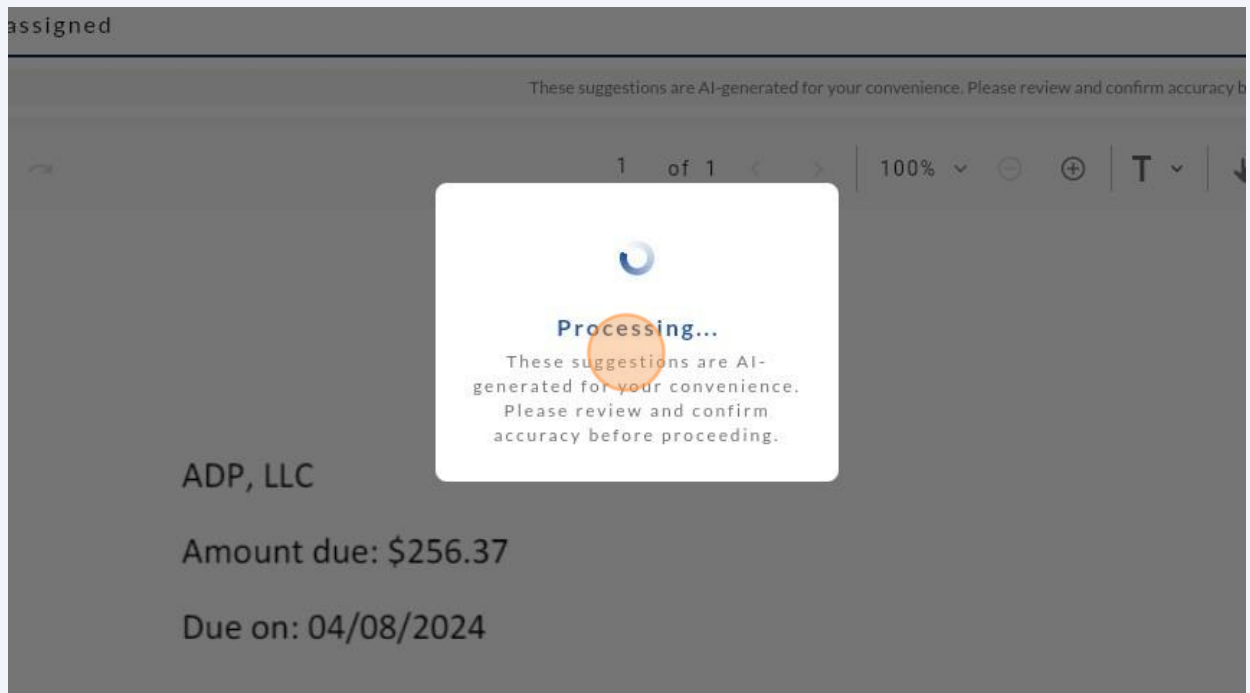
Click "Suggest" to have our AI program scan your document, apply the document's info to your bill, and assign your bill.



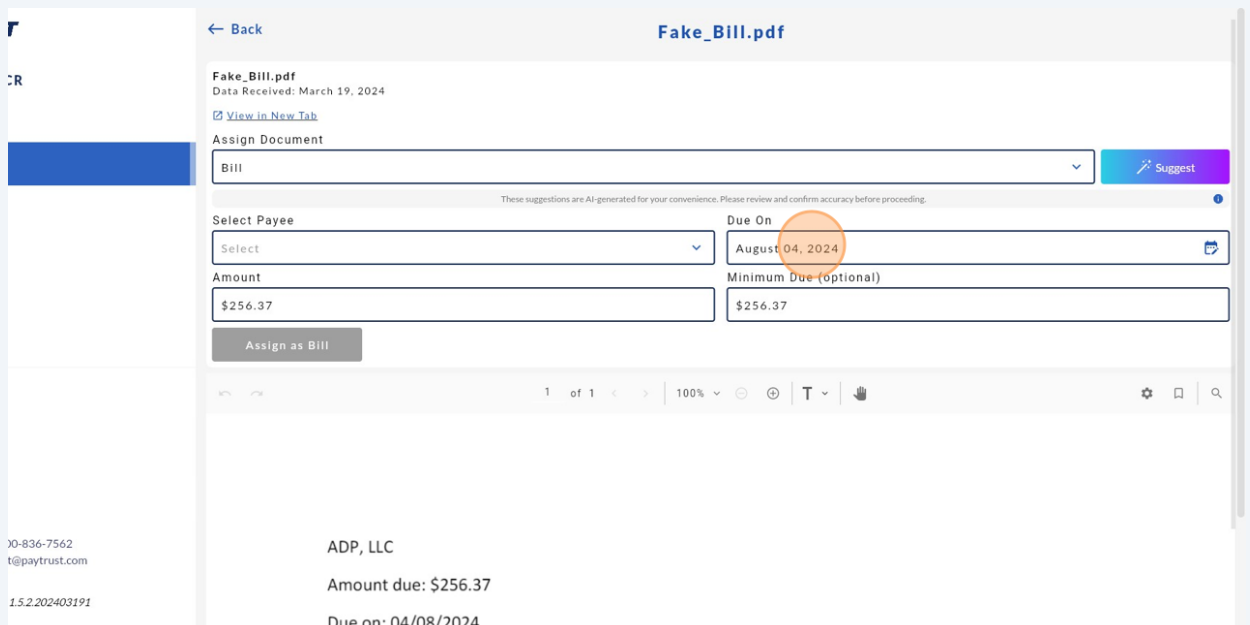
6 Click "Try Suggestions."



- 7 Wait for the AI system to read your document, this may take a minute or two.



- 8 You will find information for the document added to newly populated fields above your statement.





Please note: Sometimes the AI will not be able to detect all details in your document correctly, please always review the information provided carefully before assigning, and edit any information that requires updating.

9

If you would like to change any info for the details of the bill, click into the field.

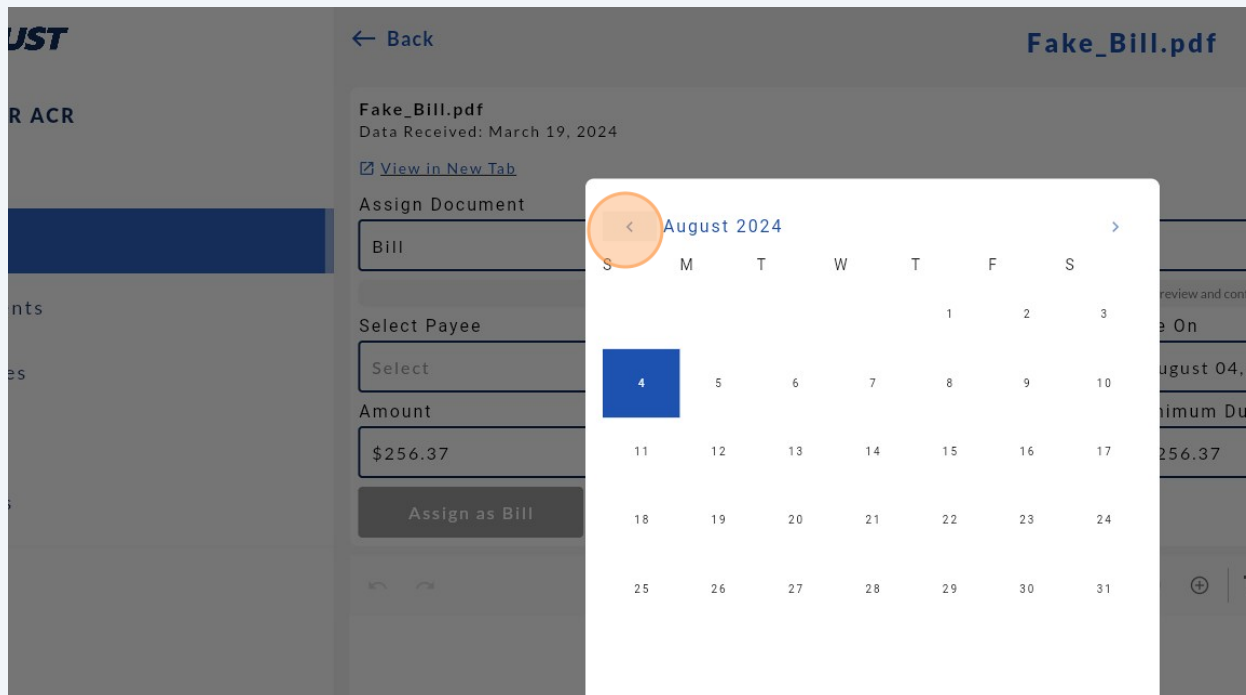
To change the dollar amounts, you would type the correct dollar amounts into the field.

For adding or changing the "due on" date, click the calendar icon to bring up the calendar and add the correct due date.

The screenshot shows a form with a dropdown menu at the top right containing a 'Suggest' button. Below this is a warning message: 'ed for your convenience. Please review and confirm accuracy before proceeding.' The form has two main sections: 'Due On' and 'Minimum Due (optional)'. The 'Due On' section has a dropdown menu on the left and a text field on the right containing 'August 04, 2024'. A calendar icon is visible in the bottom right corner of the 'Due On' text field, highlighted with an orange circle. The 'Minimum Due (optional)' section has a text field containing '\$256.37'. At the bottom of the form is a toolbar with various icons: a right arrow, a zoom level of '100%', zoom in and out buttons, a text color selector, a hand icon, a settings gear, a bookmark icon, and a search icon.

10

You can shuffle through the months by clicking the arrows at the top of the calendar on either side of the month.

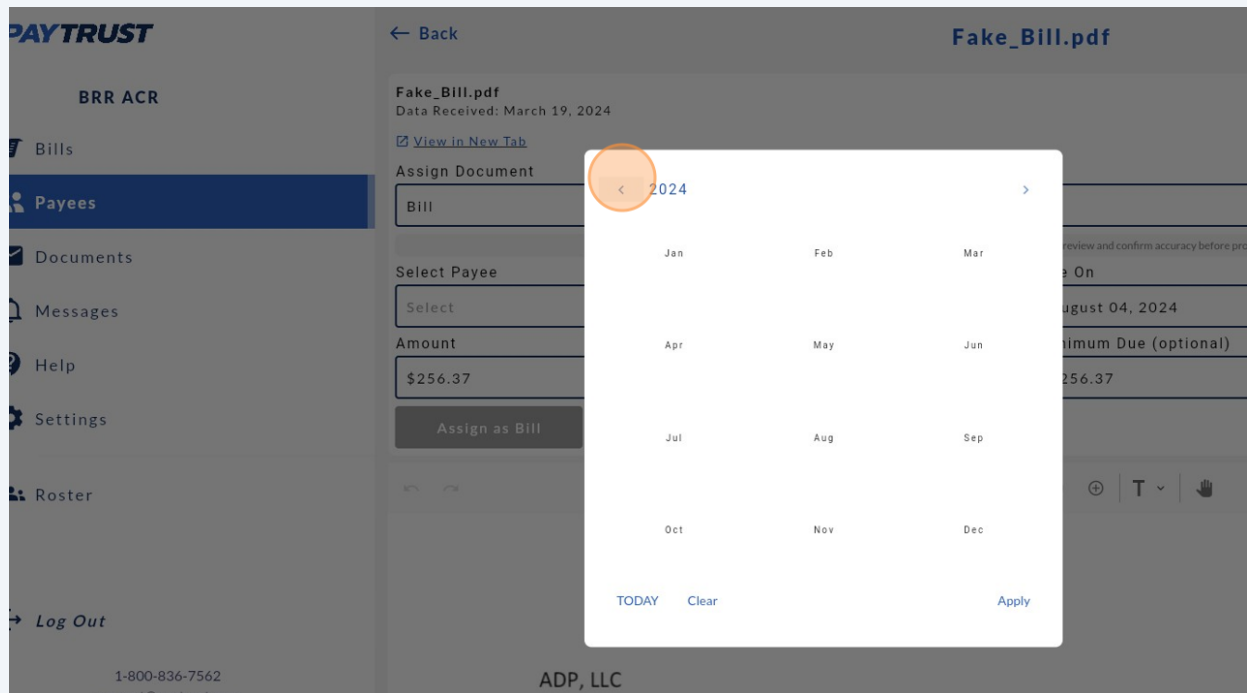


11

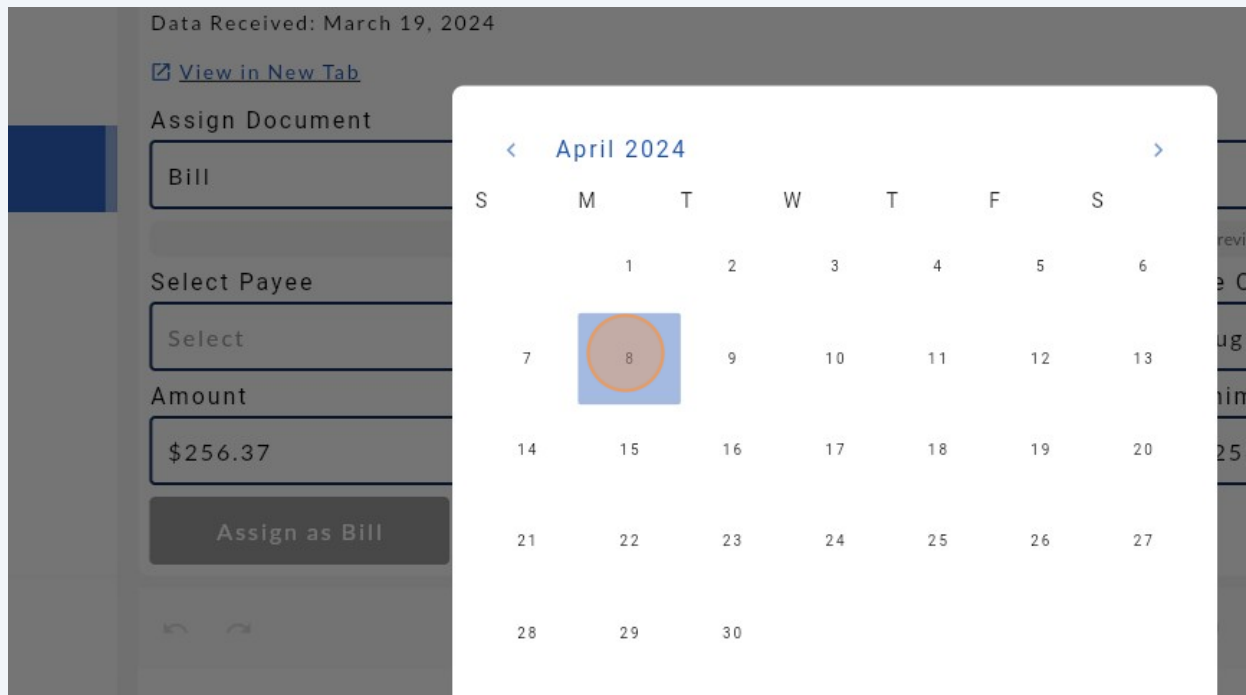
You may change to the year-view by clicking on the name of the month at the top of the calendar in blue.

Now, you will be able to select the month for the year below, or toggle through the years with the arrows at the top of the calendar.

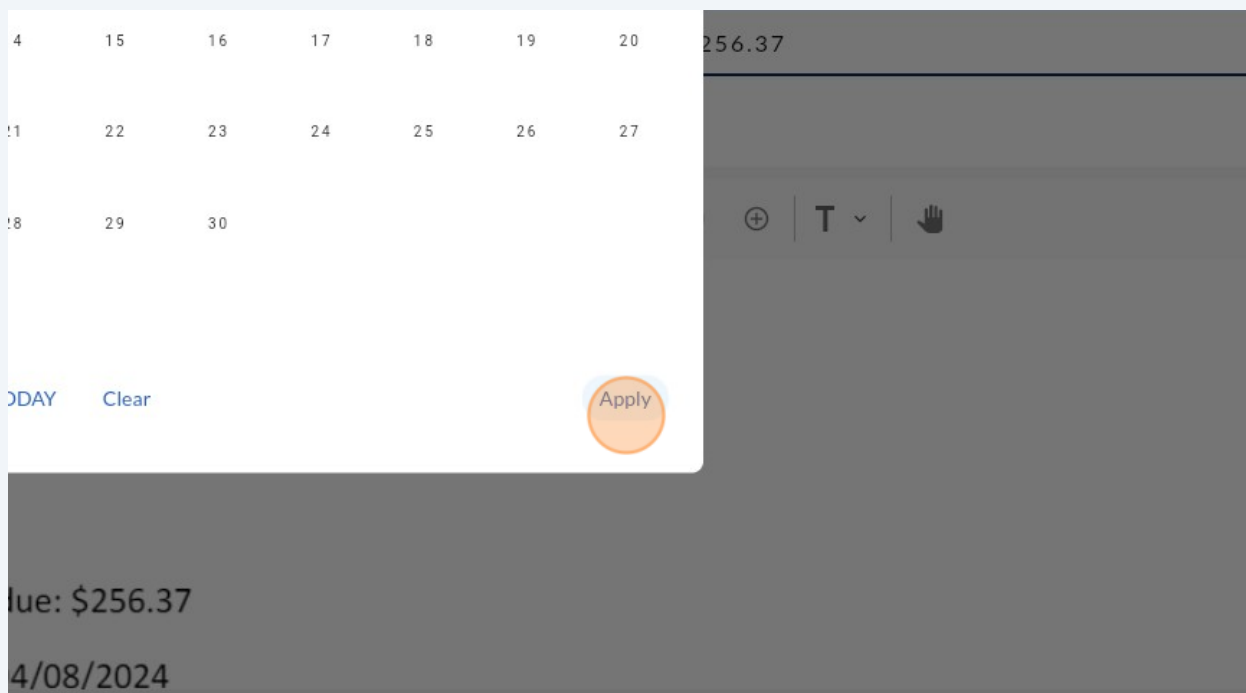
To go back to month view, click one of the months in the year, or click "Today" at the bottom left corner of the calendar to return to today's date.



- 12 Once you've found the appropriate month, click the date to select the due date.



- 13 Click "Apply" at the bottom right



- 14 If the AI was unable to select the correct payee, click into the "select payee" field.

Fake_Bill.pdf
Data Received: March 19, 2024
[View in New Tab](#)

Assign Document

Bill

Select Payee

Select

Amount

\$256.37

Assign as Bill

1 of 1

- 15 The drop down menu will display a list of your payees. Please wait a few seconds for the list to load.

Here you can select a payee from the list that populates, search for the payee in the search bar at the top and click on the correct payee, or create a new payee to assign the bill to using the grey button to the left of the search bar, labeled "add a payee".

Fake_Bill.pdf
Data Received: March 19, 2024
[View in New Tab](#)

Assign Document

Bill

Select Payee

Select

Due On

April 08, 2024

Payees

Add a Payee Search

Name (ascending) Show Hidden Payees

Amount due: \$256.37

16 In this case, I will search for the payee account you would like to assign the bill to.

(There is a separate tutorial for adding a payee which you can refer to for creating a new payee).

The screenshot shows a web interface for assigning a bill to a payee. On the left is a blue sidebar. The main content area has a header with the word "Bill" in a light blue box. Below this is a light gray bar with the text "These suggestions are AI-generated for your convenience". The main section is titled "Select Payee" and contains a dropdown menu with the word "Select" and a downward arrow. Below the dropdown is a light gray bar with the text "Add a Payee" and a search icon. To the right of the search icon is a search input field with the word "search" and a magnifying glass icon. Below the search bar is a dropdown menu with the text "Name (ascending)" and a downward arrow. The search results are displayed in a table with two columns: "Name" and "Address". The first row shows "ADP, LLC" under the Name column and "...2028" under the Address column. The second row shows "Adrian Echevarria" under the Name column and an empty cell under the Address column.

Name	Address
ADP, LLC	...2028
Adrian Echevarria	

17

The search menu will update and filter out unnecessary payees based on the info entered in the Search bar. Find the payee you're looking for in the list of payees and click on that payee to select.

Note: You can also turn hidden payees on from this menu on the toggle to the right at the top of the listed payees. If more than a few payees have the same names, you will be able to scroll through the list to pick the correct payee.

← Back Fake_Bill.pdf

Fake_Bill.pdf
Data Received: March 19, 2024
[View in New Tab](#)

Assign Document
Bill Suggest

These suggestions are AI-generated for your convenience. Please review and confirm accuracy before proceeding.

Select Payee Due On
Select April 08, 2024

Payees

Add a Payee

Name (ascending) Show Hidden Payees

ADP, LLC ...2028	>
PNC BANK C/O ADP INC ...2028	>

Amount due: \$256.37
Due on: 04/08/2024

18 Once all details have been filled out correctly, click "Assign as Bill"

[view in new tab](#)

Assign Document

Bill

These suggestions are AI-generated for your convenience. Please review and confirm accuracy before proceeding.

Select Payee	Due On
ADP, LLC	April 08, 2024
Amount	Minimum Due (optional)
\$256.37	\$256.37

Assign as Bill

1 of 1 | 100% | T |

ADP, LLC

19 Click Confirm once you're sure.

These suggestions are AI-generated for your convenience. Please review and confirm accuracy before proceeding.

Payee	Due On
LLC	April 08, 2024
nt	Minimum Due (optional)
,37	256.37

Assign as Bill

Are you sure you want to assign this document as a bill?

Once confirmed, the document will be listed as an unpaid bill in the Pay tab on the Bills page or in the Payee page under Current Bills.

Confirm

Cancel

20

You will be brought to a confirmation screen. Where you can view how the bill was assigned, view the bill in a new tab, or navigate to another menu.

[← Back](#)**Fake_Bill.pdf****Fake_Bill.pdf**

Data Received: March 19, 2024

[View in New Tab](#)**Bill**

ADF, LLC...2028

Total Due: \$256.37

Minimum Due: \$256.37

Due On: April 08, 2024

Autopay: Off

[View Payee](#)[View Bills](#)[Go to Documents](#)

Assigning Documents Manually

21

Follow steps 1-4 of this manual, if you haven't done so already.

22

If you do not want to use the AI program to sort your document for you, instead of clicking "suggest," you may select the drop down menu on the top of your document.

[← Back](#)**Notice.pdf****Notice.pdf**

Data Received: March 25, 2024

[View in New Tab](#)

Assign Document

Unassigned

Unassigned

Bill

Notice

[Suggest](#)[Settings](#) [Share](#) [Search](#)

23 Select "Bill" or "Notice" depending on how you want to assign your document.

[← Back](#)

Notice.pdf

Notice.pdf

Data Received: March 25, 2024

[View in New Tab](#)

Assign Document

Unassigned

Unassigned

Bill

Notice

24 If you select "Bill," complete the fields that populate below, for more information on how, please refer to steps 9-18 above.

Notice.pdf
Data Received: March 25, 2024
[View in New Tab](#)

Assign Document

Bill

These suggestions are AI-generated for your convenience. Please review and confirm accuracy before proceeding.

Select Payee

Select

Due On

Select

Amount

0.00

Minimum Due (optional)

0.00

Assign as Bill

25

Once all mandatory fields have been completed, you will see the "Assign as Bill" turn blue. Click this to assign the bill manually.

The screenshot shows a web form titled "Assign Document". It contains several input fields: "Document" (with "Bill" entered), "Select Payee" (with "Verizon Online" selected in a dropdown), "Amount" (with "\$34.00" entered), "Due On" (with "March 29, 2024" entered), and "Minimum Due (optional)" (with "\$0.00" entered). A blue button labeled "Assign as Bill" is highlighted with an orange circle. A small disclaimer states: "These suggestions are AI-generated for your convenience. Please review and confirm accuracy before proceeding." The bottom of the form shows a PDF viewer interface with "1 of 1" pages and a "100%" zoom level.

26

If you selected "notice," for your document, there will be a place to assign the notice to a payee. Click the drop-down arrow to select your payee from the list.

Steps 14-17 go through the process of selecting a payee more in-depth.

The screenshot shows a web form titled "Assign Document" with a "notice.pdf" document. It includes a "Document" field, a "Payee" dropdown menu, and a "Suggest" button. The "Assign as Notice" button is highlighted with an orange circle. A small disclaimer states: "These suggestions are AI-generated for your convenience. Please review and confirm accuracy before proceeding." The bottom of the form shows a PDF viewer interface with "1 of 1" pages and a "100%" zoom level.

27

You may search for your payee in the search bar as well, once you've clicked the drop down arrow.

Notice.pdf
Data Received: March 25, 2024
[View in New Tab](#)

Assign Document
Notice

These suggestions are AI-generated for your convenience. Please review and confirm accuracy before proceeding.

Select Payee
Verizon Online

Payees

Add a Payee

Name (ascending)

CAREFIRST BLUE CROSS BLUE SHIELD ...6917

28

Click on the payee you would like to assign the notice to:

Notice.pdf
Data Received: March 25, 2024
[View in New Tab](#)

Assign Document
Notice

These suggestions are AI-generated for your convenience. Please review and confirm accuracy before proceeding.

Select Payee
Verizon Online

Payees

Add a Payee

Name (ascending)

CAREFIRST BLUE CROSS BLUE SHIELD ...6917

29 Click "Assign as notice".

Data Received: March 25, 2024

[View in New Tab](#)

Assign Document

Notice

These suggestions at

Select Payee

CAREFIRST BLUE CROSS BLUE SHIELD

Assign as Notice

1 0

30

You will see the following confirmation once you've manually assigned your bill or notice, and be able to navigate back to documents, view your payees, or view your bills.

[← Back](#)

Notice.pdf

Data Received: March 25, 2024

[View in New Tab](#)

Notice

CAREFIRST BLUE CROSS BLUE SHIELD...6917

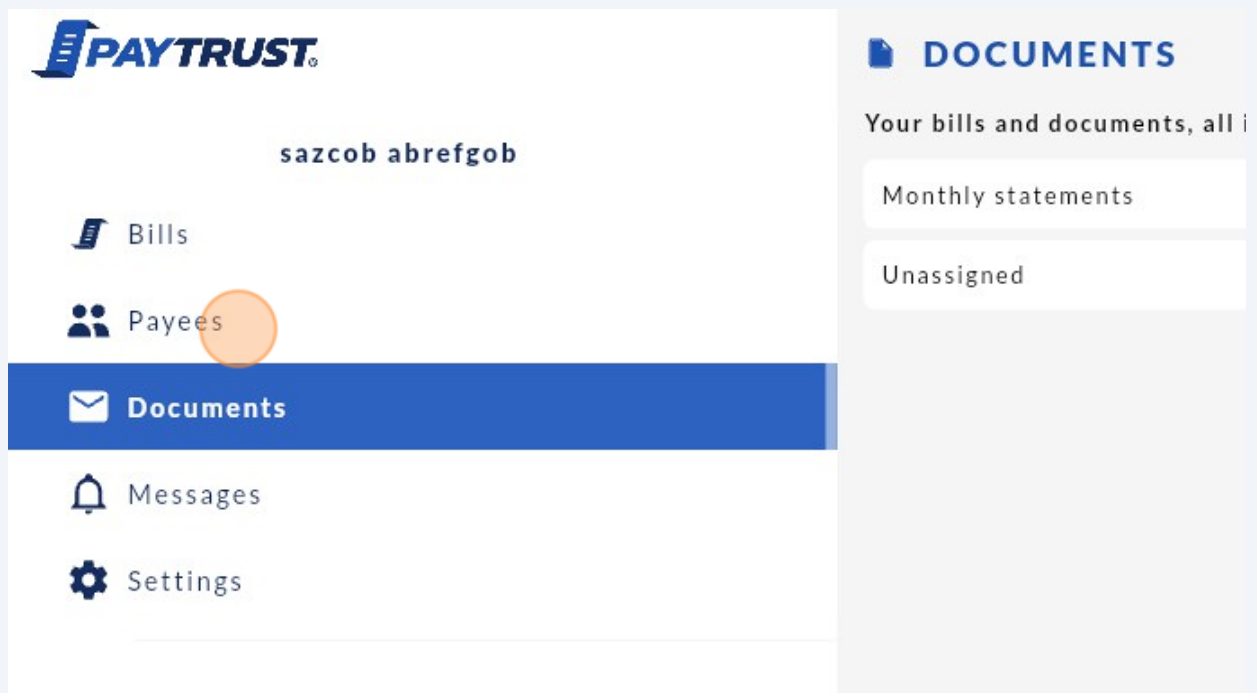
[View Payee](#)

[View Bills](#)

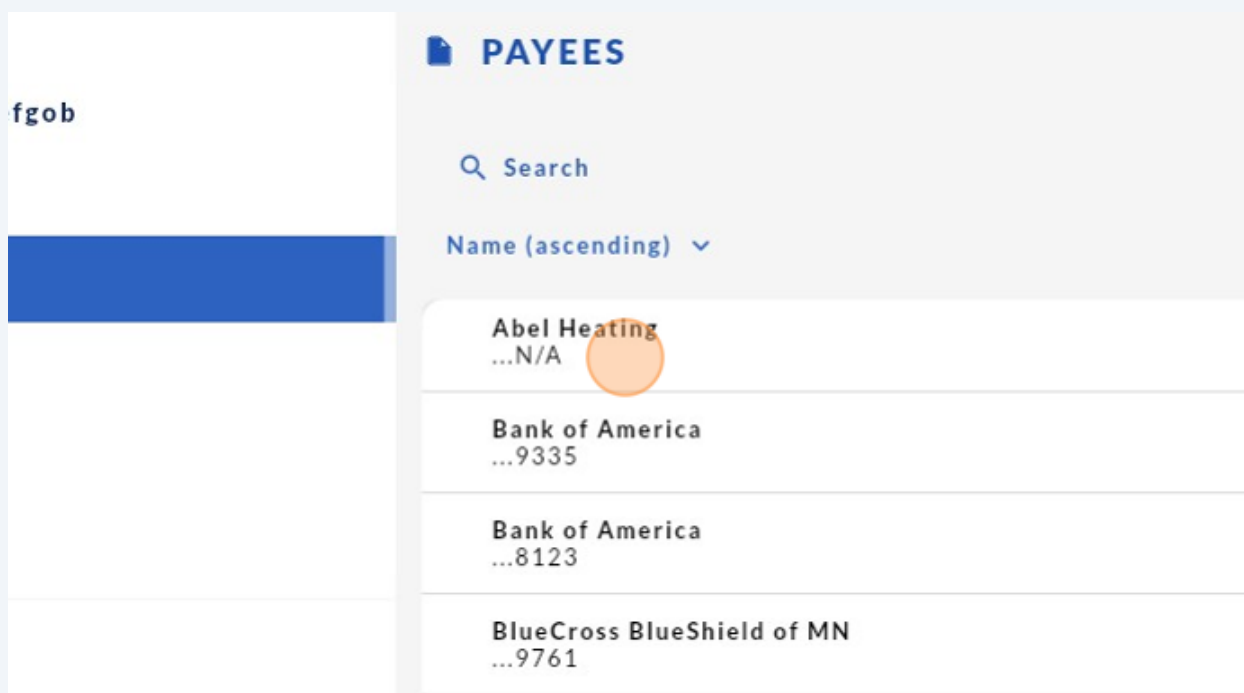
[Go to Documents](#)

Viewing Assigned Notices

- 31 If you want to view your notice in the Payee account, click on "Payees".



- 32 Click on or search for and then select the Payee Account.



33

On the page for the payee, click the arrow next to "Notices".

abrefgob

Nickname
Abel Heating

Account No. (Last 4 Digits)
**N/A

Settings

eBills [Set Up >](#)

Autopay [On >](#)

Reminder [Off >](#)

Notices [1 >](#)

Filed Bills [1 >](#)

Is hidden ☐

Current Bills

Abel Heating
\$200.00
Due 11/30/2023
View bill [Pay](#) [File Bill](#)

Scheduled Payments

Abel Heating
First National Bank of the Lakes ...1183
Scheduled for 11/22/2023 [Edit](#) \$10.00

Abel Heating
Citi Bank ...4125
Scheduled for 12/01/2023 [Edit](#) \$12.12

Abel Heating
Citi Bank ...4125
Scheduled for 12/02/2023 [Edit](#) \$1.00

Abel Heating
First National Bank of the Lakes ...1183
Scheduled for 12/04/2023 [Edit](#) \$1.00

[Set Up >](#)

[On >](#)

[Off >](#)

[1 >](#)

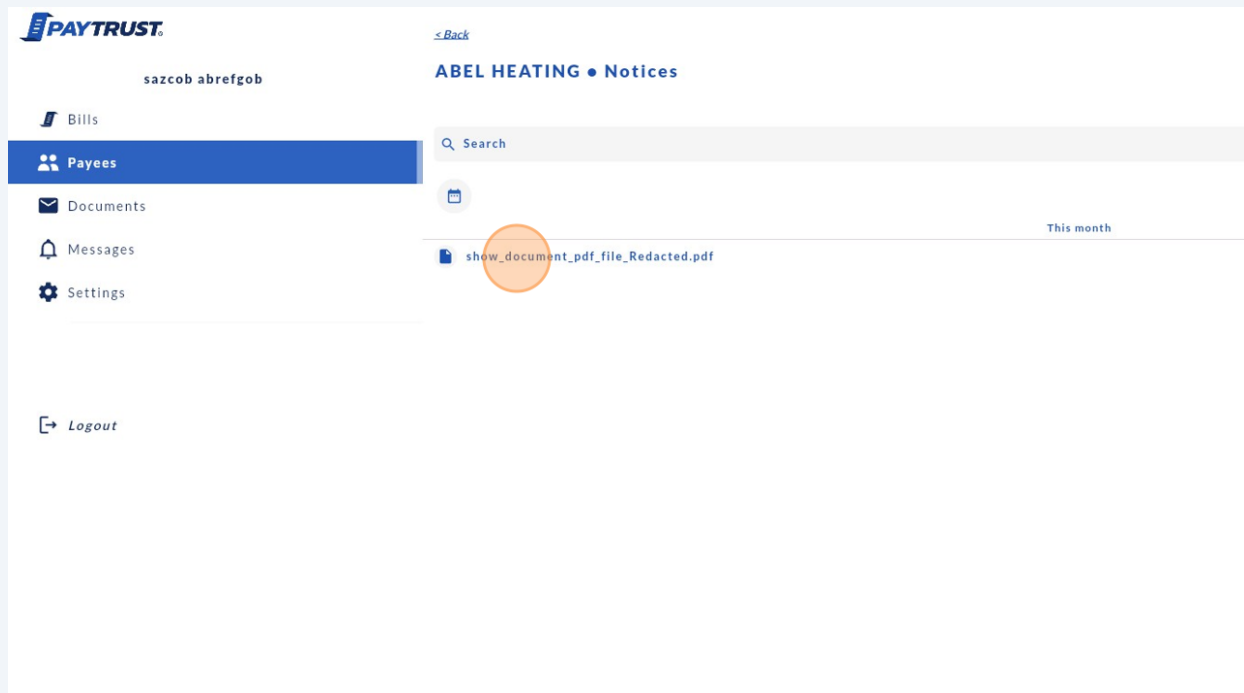
[1 >](#)

☐

[Pay](#)

34

Click on the notice you want to view, and a pdf file of the document will pop up in a new window.



Viewing Assigned Bills

35

You can find your newly assigned bills in the "Bills" section of the portal, either under the "Pay" tab (if not on autopay) or under the "Scheduled" tab if the payee is on autopay.

