

Registration

To register in eRocks:

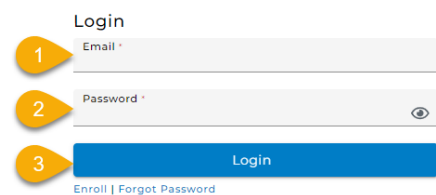
1. Open the **Welcome to eRocks** email
2. Click the **Register** button in the email
3. Update the security information
 - Password
 - Security Questions
 - Email Address (Optional)



Login

To login to eRocks:

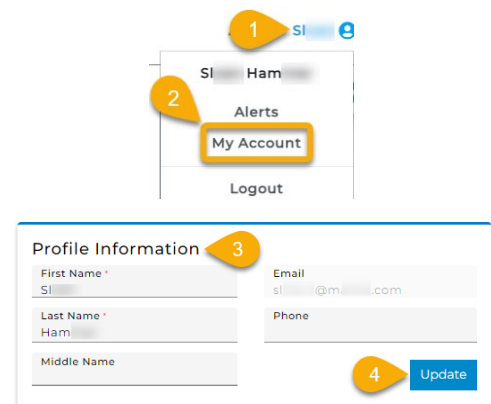
1. Enter username (registered email address)
2. Enter password (case sensitive)
3. Click **Login**



Modify Account

To modify a user account in eRocks:

1. Click the username in the top left corner
2. Select **My Account**
3. Update profile information as needed, including:
 - Name
 - Email
 - Phone Number
 - Reset Password
 - Security Questions
4. Click **Update** to save changes



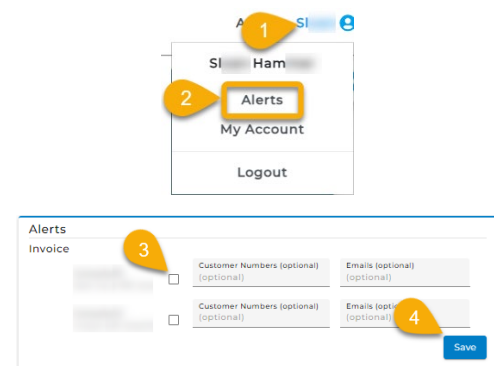
Modify Alerts

To modify alerts:

1. Click the username in the top left corner
2. Click **Alerts**
3. Click the boxes to modify subscriptions

NOTE: Multiple email addresses can be set for each subscription type.

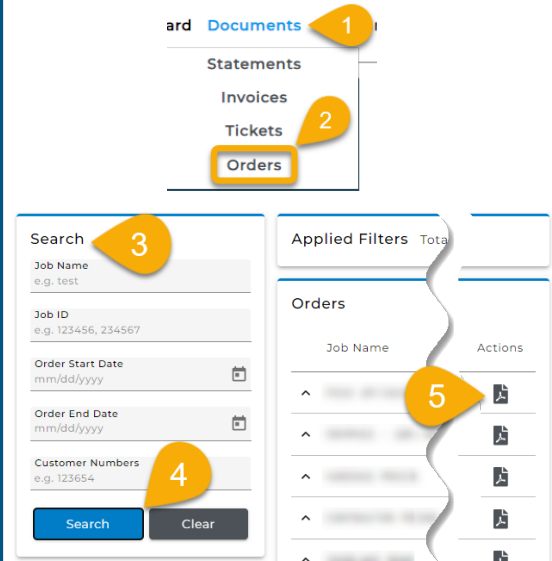
4. Click **Save**



View / Print Orders

To view or print orders:

1. Hover over the **Documents** dropdown in the menu
2. Click **Orders**
3. Enter **Job Name**, **Job ID**, or **Date** to search for orders
4. Click **Search**
5. Click the PDF icon next to the order to view and print an order

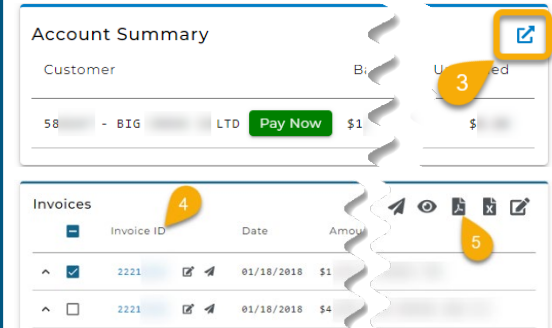


The screenshot shows the 'Documents' dropdown menu with 'Orders' highlighted. Below it is a search form with fields for Job Name, Job ID, Order Start Date, Order End Date, and Customer Numbers. To the right is a table of orders with columns for Job Name and Actions, where the PDF icon in the Actions column is highlighted.

View / Print Invoices, Tickets, & Statements

To view, print, or save invoices, tickets, and statements:

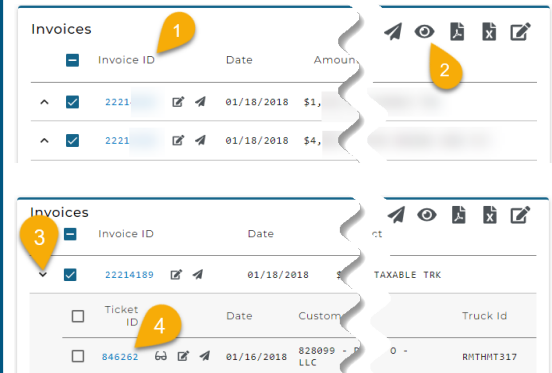
1. Hover over the **Company** dropdown in the menu
2. Click **Accounts**
3. OR Click the popout icon in the **Account Summary** homepage section
4. Click the Invoice ID to view, print, or save an invoice
5. Click the PDF icon to view, print, or save the account listing



The screenshot shows the 'Account Summary' section with a 'Pay Now' button. Below it is a table of invoices with columns for Invoice ID, Date, and Amount. The PDF icon in the Actions column is highlighted.

To view, print, or save **multiple** invoices:

1. Check the box for all applicable invoices
2. Click the eye icon at the top right of the table
3. Click the upward arrow next to the Invoice ID to view, print or save a ticket
4. Click the ticket number
5. Click **Statements** in the **Documents** dropdown to view, print, or save month-end account statements



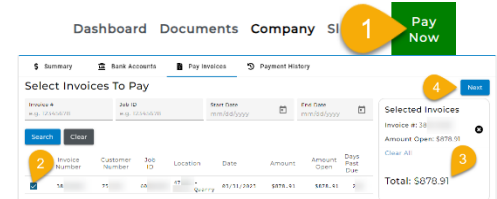
The screenshot shows the 'Invoices' table with multiple rows. The first row is expanded, showing a 'Ticket ID' column. The PDF icon in the Actions column is highlighted.

Make Payments Process

For the first payment, a **Bank Account Number, Routing Number, and Bank Statement Address** are needed.
 Credit cards are **not** accepted.

1. Dashboard / Payment Screen

1. Click **Pay Now** on the dashboard
2. Click the check box for each invoice number that will be paid on the **Invoices** screen
3. Review the **Total**
4. Click **Next**

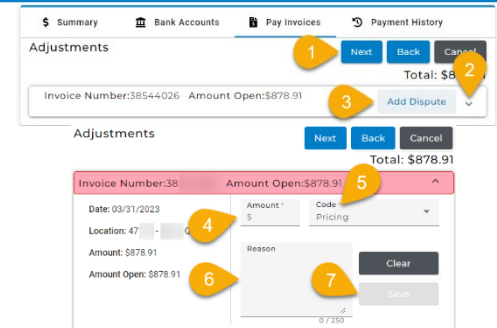


2. Adjustments

1. Click **Next** if no disputes/adjustments on the invoice amount are needed
2. Click the down arrow to dispute/adjust the invoice under **Adjustments**
3. Click **Add Dispute**
4. Enter the required amount
5. Select dispute code
6. Enter a reason for the dispute if desired
7. Click **Save** when done

NOTE: Enter the amount in question, not how much is wanted to pay.

8. Click **Next**



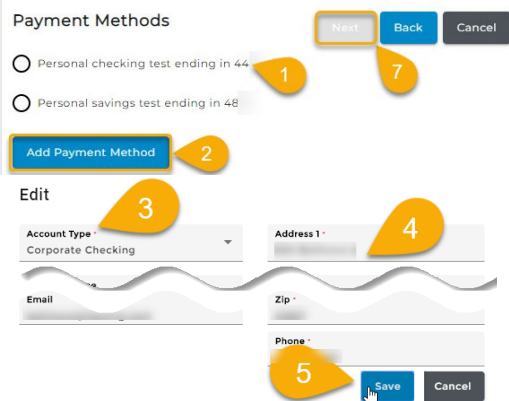
3. Payment Method

NOTE: Multiple payment methods can be added to eRocks and stored for future Payment info can be edited in the **Bank Account** tab to **Edit** or **Create**.

1. Select a method from the list on the **Payment Method** screen
2. OR Click **Add Payment Method** to add a payment method
3. Select **Account Type**
4. Enter all required information

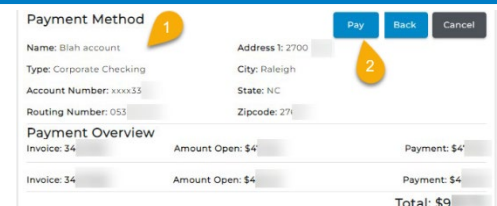
NOTE: Required info indicated by (*).

5. Click **Save**
6. Select the entered payment option
7. Click **Next**



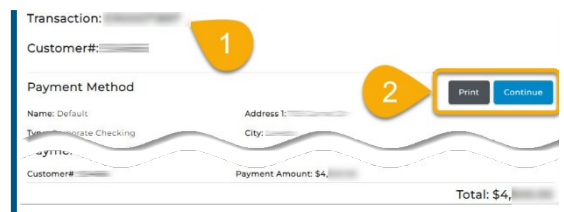
4. Review

1. Review the details added thus far, including:
 - Payment Method
 - Disputes
 - Invoices being paid list
 - Total Amount
2. Click **Pay**
3. Click **Pay** again on the confirmation pop-up



5. Summary

1. Wait for confirmation to display on the Summary page
2. Click **Print** to print
3. OR Click **Continue** for eRocks to email the confirmation

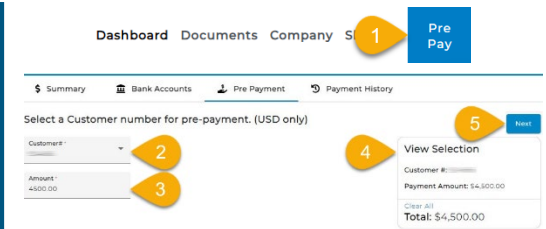


Make Pre-Payments Process

For the **first payment**, a **Bank Account Number, Routing Number**, and **Bank Statement Address** are needed.
 Credit cards are **not** accepted.

1. Dashboard / Payment Screen

1. Click the **Pre-Pay** button on the dashboard
2. Select the customer number on the **Customer Numbers** screen
3. Enter the amount
4. Review the total
5. Click **Next**



The screenshot shows the dashboard with a 'Pre Pay' button highlighted by callout 1. Below it, a 'View Selection' pop-up window is shown with callouts 2 through 5. Callout 2 points to the 'Customer #' field, callout 3 to the 'Amount' field, callout 4 to the 'View Selection' button, and callout 5 to the 'Next' button in the pop-up.

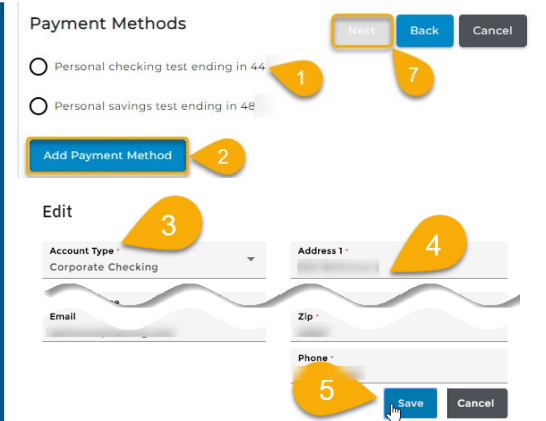
2. Payment Method

NOTE: Multiple payment methods can be added to eRocks and stored for future. Payment info can be edited in the **Bank Account** tab to **Edit** or **Create**.

1. Select a method from the list on the **Payment Method** screen
2. OR Click **Add Payment Method** to add a payment method
3. Select **Account Type**
4. Enter all required information

NOTE: Required info indicated by (*).

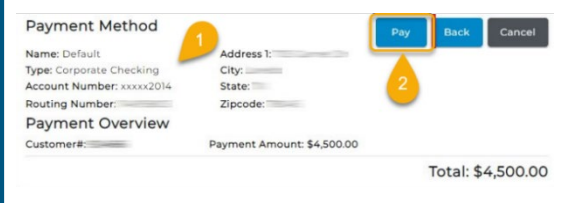
5. Click **Save**
6. Select the entered payment option
7. Click **Next**



The screenshot shows the 'Payment Methods' screen. Callout 1 points to a radio button for 'Personal checking test ending in 44'. Callout 2 points to the 'Add Payment Method' button. Callout 3 points to the 'Account Type' dropdown menu. Callout 4 points to the 'Address 1' field. Callout 5 points to the 'Save' button. Callout 6 points to the 'Next' button, and callout 7 points to the 'Back' button.

3. Review

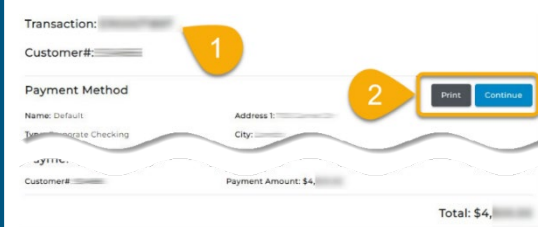
1. Review the details added thus far, including:
 - Payment Method
 - Total Amount
2. Click **Pay**
3. Click **Pay** again on the confirmation pop-up



The screenshot shows the 'Payment Method' review screen. Callout 1 points to the 'Pay' button. Callout 2 points to the 'Pay' button in the 'Payment Overview' section. The 'Payment Overview' section shows 'Payment Amount: \$4,500.00' and 'Total: \$4,500.00'.

4. Summary

1. Wait for confirmation to display on the **Summary** page
2. Click **Print** to print
3. OR Click **Continue** for eRocks to email confirmation



The screenshot shows the 'Summary' page. Callout 1 points to the 'Transaction' field. Callout 2 points to the 'Print' button. The 'Payment Overview' section shows 'Payment Amount: \$4,500.00' and 'Total: \$4,500.00'.