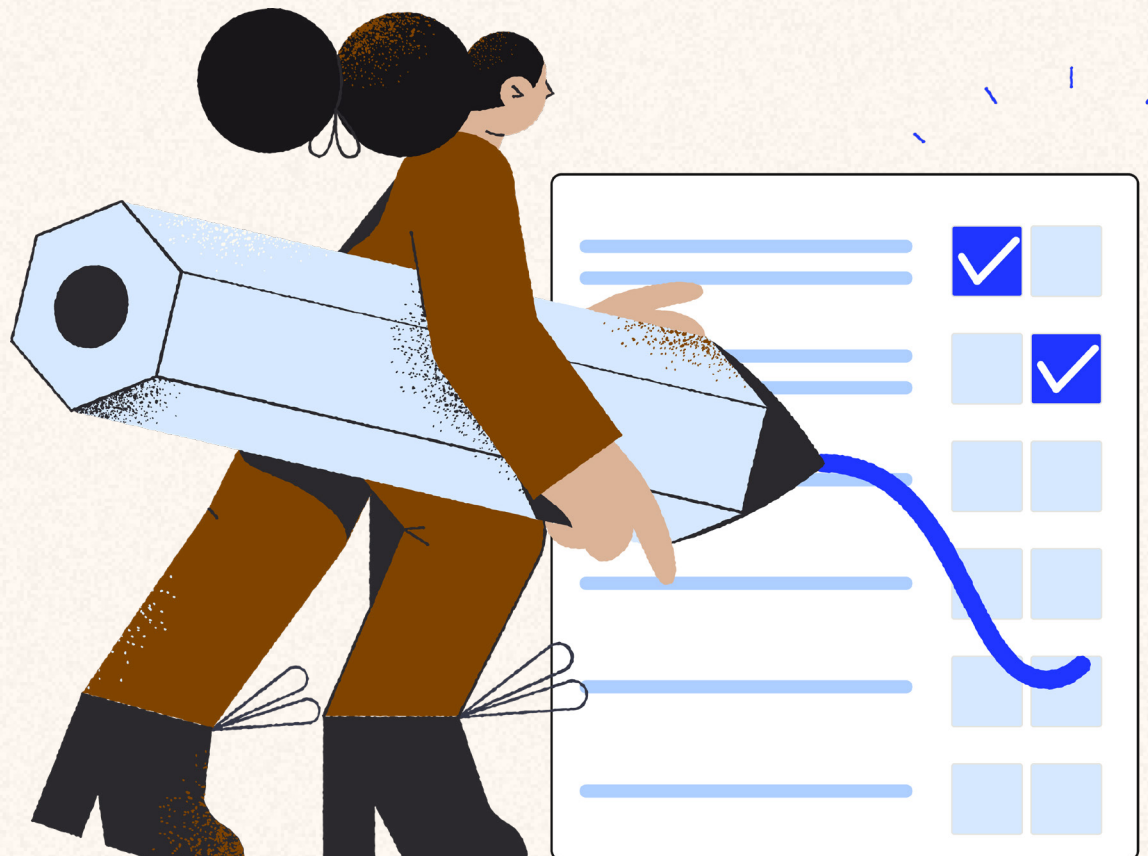




# Evaluation Checklist for Accounts Receivable Payment Portals

Easily evaluate accounts receivable payment portals using this checklist. Find the right software to accelerate cash flow, drive efficiencies, and significantly boost customer experience



## Account management capabilities

What to consider	Yes	No
Can customers view invoices and statements and download them in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can customers view online and offline payment history, with images and receipts in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can accounts receivable teams set up automated payments in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can customers receive email notifications and configure them in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can accounts receivable teams view AR aging buckets in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can accounts receivable teams filter views based on customer name, type, payment status, aging criteria, disputes, and more, in the portal?	<input type="checkbox"/>	<input type="checkbox"/>

## Online payment facilitation functionality

What to consider	Yes	No
Can customers pay by credit card, ACH, or with account credits in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can customers pay multiple invoices or a statement with a single payment in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can customers set up autopay functions and schedule payments in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can accounts receivable teams collect deposits against sales orders and apply them to payments (and view unassigned deposits) in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can accounts receivable place credit card surcharges in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can accounts receivable offer and set up customer repayment plans in the portal?	<input type="checkbox"/>	<input type="checkbox"/>

## Collaboration and communication abilities

What to consider	Yes	No
Are there self-serve signup and access management functions in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can you automate email reminders and dunning notices in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Can customer and internal teams comment / converse with each other in real-time in the portal? (And is there a historical log of communications that all parties can access?)	<input type="checkbox"/>	<input type="checkbox"/>
Are activity audit trails available in the portal?	<input type="checkbox"/>	<input type="checkbox"/>
Are there custom group communication functions in the portal?	<input type="checkbox"/>	<input type="checkbox"/>