



QuickFee.



## Setting Up Your Payment Portal Account

Our payment provider QuickFee makes it easy for you to set up an account, automate your payments, and manage outstanding invoices. While you can always choose to make payments as a guest, creating an account unlocks valuable features that will help you stay on top of your invoices.

### KEY FEATURES AND BENEFITS:

- + **Payment Notifications** - Stay updated on your payment status with timely alerts.
- + **Store Payment Methods** - Save both ACH and card details for faster future transactions.
- + **Profile Storage** - Your billing information will automatically populate for future payments.
- + **Outstanding Invoice View** - See and manage all your outstanding invoices in one place for quick and easy payments.
- + **Autopay Options** - Set up automatic payments using stored payment methods—never miss a due date again!
- + **Increased Security** - Enhance security by controlling access to your protected information.

## HOW TO CREATE YOUR ACCOUNT IN 4 SIMPLE STEPS:

The screenshot shows the Carrot CPAs payment portal. At the top right, there are 'LOG IN' and 'SIGN UP' buttons. A circular callout highlights the 'SIGN UP' button. The main content area is divided into two columns. The left column has an 'Email' field, a '+ NEW INVOICE/REF' button, and an 'Invoice or Reference' table with columns for 'Client ID or Client Name', 'Invoice or Reference', and 'Amount'. The right column has a 'Payment Summary' section with '1. Invoice' and 'Total' amounts, both showing '\$0.00'. Below this is a 'Billing Information' section with 'First Name' and 'Last Name' fields. At the bottom right, there is a 'MAKE PAYMENT' button. A 'SIGN UP' button is also visible in the center of the page, highlighted by the callout.

- 1. Start the Signup Process.** Navigate to our payment portal and click the Sign Up button in the top right corner. This will take you to the account registration page.
- 2. Fill in Your Details.** Enter your email address, create and confirm a secure password, and complete the CAPTCHA to verify you're human.
- 3. Confirm Your Email.** Check your email inbox for a confirmation message. Then click the link in the email to complete the signup process.
- 4. Log in to Your Account!** Once your account is confirmed, you'll be redirected back to the login page. Use your email and password to log in and start exploring your account features.



**GOT QUESTIONS ABOUT YOUR PAYMENTS OR USING THE QUICKFEE PORTAL? PLEASE CONTACT OUR FIRM DIRECTLY FOR ASSISTANCE.**