



## Release Notes November 2023 – Instructions

### Ability to attach documentation to invoices in Finexio Portal

Additional documentation can be attached to invoices in the Finexio Portal via the file uploader. The 3-sheet (double-sided) limit noted in the email is a ballpark. Specific sizing limitations are as follows:

- 1-17 invoices = 1 page (1 sheet)
- 18-40 invoices = 2 pages (1 sheet)
- 41-63 invoices = 3 pages (2 sheets)
- 64-86 invoices = 4 pages (2 sheets)
- 86-109 invoices = 5 pages (3 sheets)
- 110–132 invoices = 6 pages (3 sheets)

Our invoice limit per remittance is 132.

**Note the step-by-step instructions on the pages to follow.**

# Finexio

Start by uploading an invoice file like you would normally.

The screenshot shows the 'File Uploader' interface in the 'Files' section. A progress bar at the top indicates the 'Upload' step is complete, followed by 'Review' and 'Submit'. A green message box states: 'Your file looks good to us. Please review before submitting.' Below this is a summary table:

INVOICES	ON DEMAND INVOICES	SUPPLIERS	AMOUNT TO BE FUNDED
1	0	1	\$1

Below the summary table is a detailed table with the following columns: #, BuyerID, SupplierID, InvoiceNumber, PaymentAmount, SupplierName, InvoiceAmount, DiscountAmount, BuyerName, Address1, Address2, City, State, ZipCode, Country. A single row is visible with the following data:

#	BuyerID	SupplierID	InvoiceNumber	PaymentAmount	SupplierName	InvoiceAmount	DiscountAmount	BuyerName	Address1	Address2	City	State	ZipCode	Country
1	TEST-BUYER	TEST-SUPPLIER-CHECK	1343412233	\$1.00		\$0.00	\$0.00							

A 'Help' button is located at the bottom left of the interface.

Scroll to the right of the table, and locate the "Documentation" column.

This screenshot shows the same interface as above, but with the table scrolled to the right. The 'Documentation' column is now visible, containing a 'Choose File' button. The summary table at the top remains the same:

INVOICES	ON DEMAND INVOICES	SUPPLIERS	AMOUNT TO BE FUNDED
1	0	1	\$1

The detailed table below has the following columns: #, SupplierName, INumber, ReconciliationID, InvoiceDate, InvoiceDueDate, InvoiceReceivedDate, Note, PrimaryContactEmail, RemitEmail, ReconciliationID, Documentation. A single row is visible with the following data:

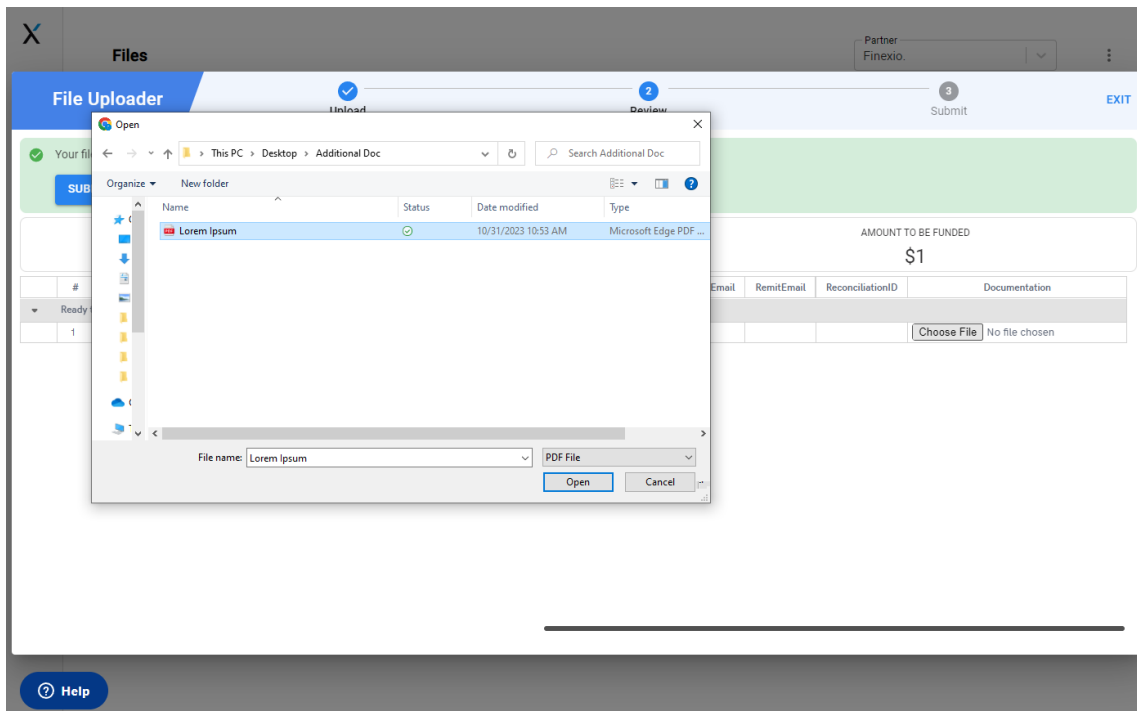
#	SupplierName	INumber	ReconciliationID	InvoiceDate	InvoiceDueDate	InvoiceReceivedDate	Note	PrimaryContactEmail	RemitEmail	ReconciliationID	Documentation
1				10-31-2023							<input type="button" value="Choose File"/> No file chosen

A red box highlights the 'Choose File' button in the 'Documentation' column. A 'Help' button is located at the bottom left of the interface.

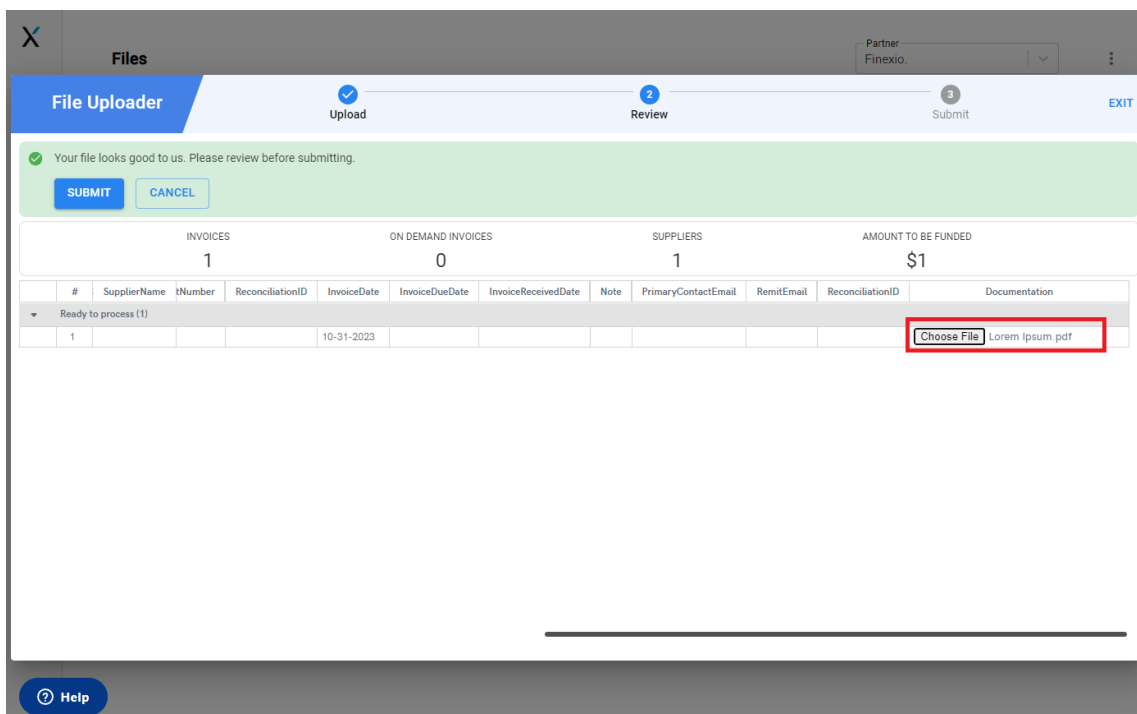


# Finexio

Click the "Choose file" button, locate the file you would like to attach to the invoice and select it.

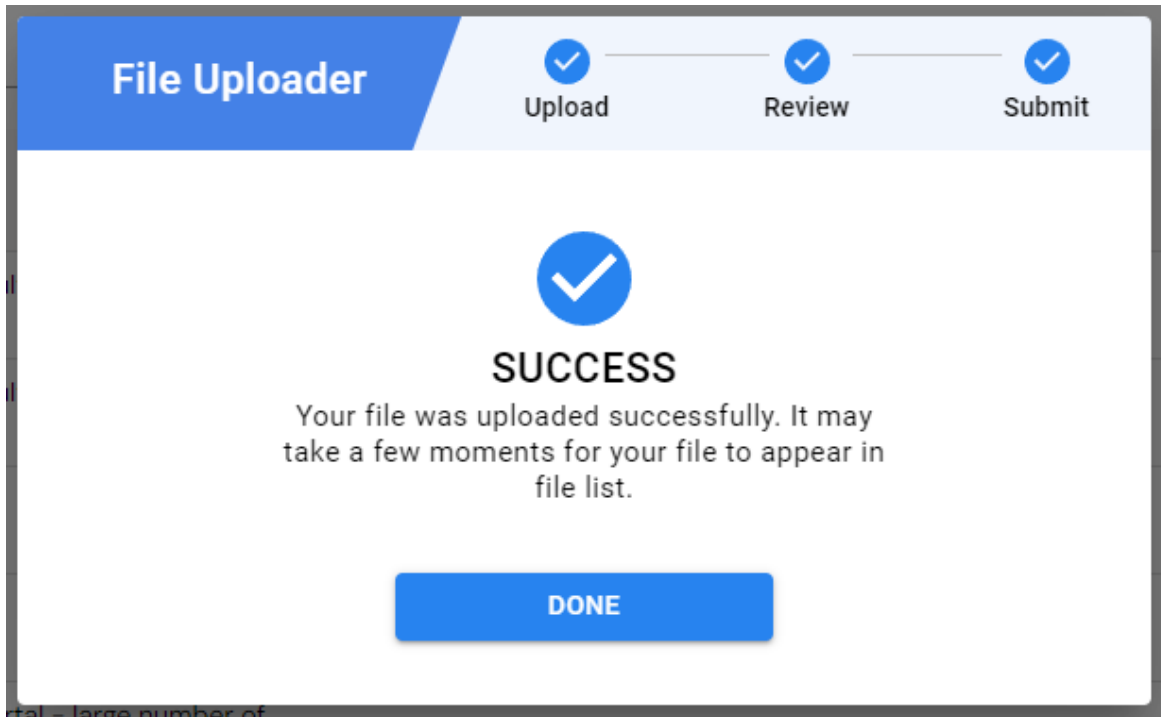


The file name is now attached to the invoice and will show in the Documentation column.

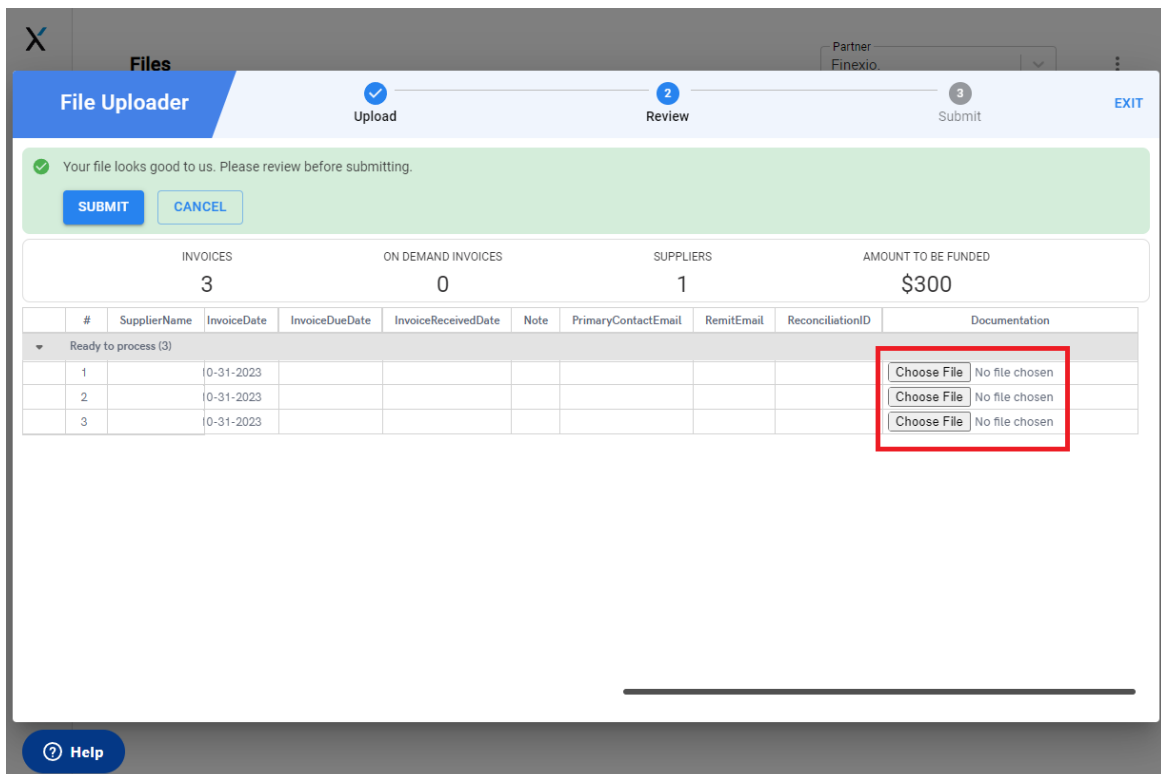


# Finexio

Submit the file by clicking the *SUBMIT* button.



Please note that documentation can be attached to multiple invoices, as shown below.



# Finexio

## Check Payments

Additional documentation will be provided along with the check and remittance information as shown on the next page.

THIS CHECK CONTAINS MANY SECURITY FEATURES INCLUDING A DIGITAL SECURITY PANTOGRAPH, VERIFICATION GRID, MICROPRINT TEXT, AND VOID TECHNOLOGY. SEE DETAILS ON BACK

**X** FINEXIO  
924 N MAGNOLIA AVE STE 202 PMB 1230  
ORLANDO, FL 32803-3220

COLUMN N.A.  
CHICO, CA 95926

**000004790**

DATE 10/31/2023

PAY One and 0/100 Dollars \$ \*\*\*\*1.00

TO THE ORDER OF

TEST SUPPLIER  
66 EMERALD WOODS DR TEST  
NAPLES, FL 34108-2576

Memo: From Test Buyer

*Chris Scott*

#0000004790# 12145307 **CENSORED**

**Unlock the power of secure, flexible and instant virtual cards with Finexio!**

Visit [finexio.com/supplier-enroll](https://finexio.com/supplier-enroll) to start using this game-changing solution for your financial needs.

- Faster Payments
- Improved Cash Flow
- Safer Payments

**Payment from**  
Test Buyer  
123 street address  
Miami, FL 33101

**Care of**  
Finexio  
924 N Magnolia Ave STE 202  
Orlando, FL 32803

**Check void after 90 days**  
Printed Date: 10/31/2023  
Payment ID: RC00P00C00T40A54G  
Check Number: 4790

Invoices Paid Page : 1 of 1

Invoice No.	Invoice Date	Account No.	Accounting Id	Memo	Amount
1343	10/31/2023				\$1.00
<b>Total Payable</b>					<b>\$1.00</b>

Questions regarding your payment?

Visit <https://support.finexio.com/>

Email [support@finexio.com](mailto:support@finexio.com)

**Finexio**



Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla viverra fringilla semper. Aenean blandit, ex quis laoreet porttitor, mi mi volutpat lorem, sed efficitur tortor turpis sed justo. Vestibulum id pretium lorem. Proin dapibus ipsum ligula. Mauris a magna feugiat, finibus ipsum sit amet, laoreet elit. Vestibulum in malesuada est. Mauris bibendum neque nulla, et rhoncus neque luctus sed. Nunc enim quam, fermentum eget risus sed, lobortis dictum mauris. Cras nisi lectus, venenatis at facilisis ac, commodo quis nulla. Sed quis pharetra neque. Nulla ac quam et mauris fringilla fringilla ac eu sapien. Aenean gravida, orci fringilla faucibus malesuada, nisi turpis posuere ligula, non cursus metus odio a ex. Vestibulum felis nibh, viverra nec feugiat sit amet, tempus venenatis urna. Quisque ullamcorper ac felis sit amet consectetur. Suspendisse placerat metus in est pharetra, quis tincidunt quam porttitor. Nam et facilisis nisi.

In eu urna ligula. Aliquam imperdiet, mi et auctor ullamcorper, justo lectus dapibus tortor, ac congue nisi diam in ligula. Cras malesuada, neque eget lacinia tincidunt, nulla lacus congue risus, id consequat urna nisi a elit. Nullam sollicitudin porttitor varius. Nulla imperdiet, nibh ac pulvinar luctus, tortor orci viverra metus, ac consequat metus sapien in ipsum. Praesent id congue purus. Pellentesque purus sem, finibus nec tempor eget, scelerisque in sem. Ut id ipsum nunc. Pellentesque ac orci vel ex mollis varius eu eget arcu. Mauris elit erat, suscipit ut lorem vitae, semper fringilla tellus. Aliquam ut tellus tortor. Phasellus vitae cursus orci.

In commodo aliquam metus in cursus. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur vel commodo urna, at faucibus nunc. Pellentesque faucibus neque nunc, in viverra urna sodales a. Nam sagittis ante ut varius dignissim. Nunc a tellus arcu. Integer sollicitudin vehicula cursus. Proin est nulla, dapibus id nibh ac, vestibulum malesuada arcu. Duis vel sollicitudin nisi, id egestas felis. Integer mattis massa at ultricies porttitor. Cras varius lectus at facilisis viverra. Nunc varius odio neque, eget porttitor elit laoreet a. Aenean justo est, elementum ultricies sem vitae, fringilla hendrerit velit. Aenean ullamcorper rhoncus aliquam.

Ut vehicula leo sit amet erat sollicitudin suscipit. Quisque vitae augue ut eros malesuada lobortis vitae at ligula. Aliquam erat volutpat. Donec pellentesque justo eu risus laoreet, at rutrum metus tincidunt. Nullam mattis orci ut dapibus interdum. Nam malesuada, nibh sit amet mollis congue, leo augue euismod erat, ac vehicula dolor justo eget nisi. In hac habitasse platea dictumst. Integer vestibulum, magna ac viverra ultrices, justo arcu luctus eros, vel convallis elit mi eget magna. In eu tristique neque.

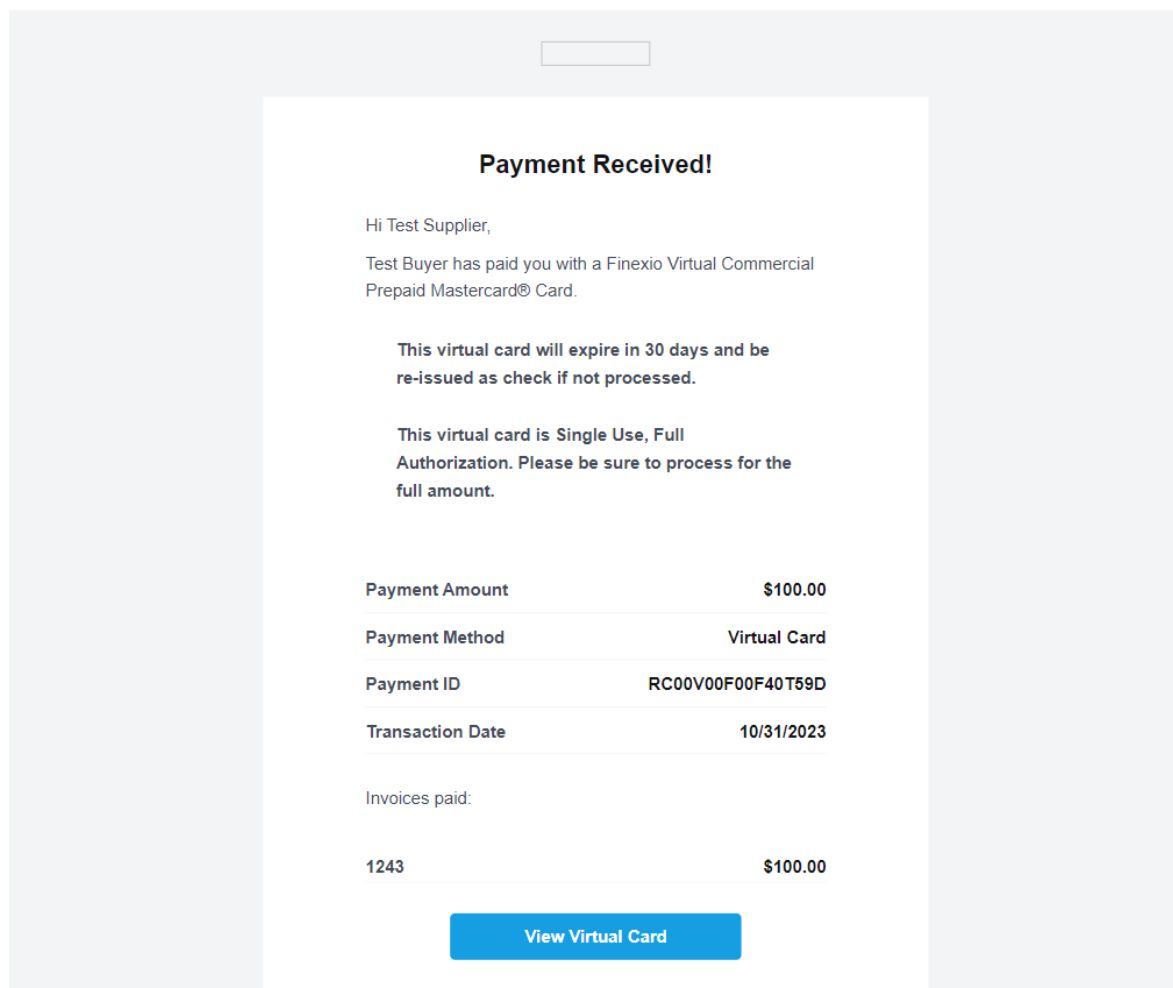
Mauris sagittis semper mauris. Donec vulputate dictum velit, ut viverra ex. In hac habitasse platea dictumst. Donec congue vel erat ac egestas. Suspendisse porta, orci a vestibulum rutrum, lacus diam cursus justo, eu egestas ligula purus vel ligula. Donec efficitur urna nulla, eget molestie purus volutpat in. Duis gravida cursus pulvinar. Nulla scelerisque fringilla nisi id auctor. Pellentesque pretium augue quis eros sodales mollis.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla viverra fringilla semper. Aenean blandit, ex quis laoreet porttitor, mi mi volutpat lorem, sed efficitur tortor turpis sed justo. Vestibulum id pretium lorem. Proin dapibus ipsum ligula. Mauris a magna feugiat, finibus ipsum sit amet, laoreet elit. Vestibulum in malesuada est. Mauris bibendum neque nulla, et rhoncus neque luctus sed. Nunc enim quam, fermentum eget risus sed, lobortis dictum mauris. Cras nisi lectus, venenatis at facilisis ac, commodo quis nulla. Sed quis pharetra neque. Nulla ac quam et mauris fringilla fringilla ac eu sapien. Aenean gravida, orci fringilla faucibus malesuada, nisi turpis posuere ligula, non cursus



## Virtual Cards, ACH, and Wire Payments

Additional documentation provided when uploading invoices will be attached in Virtual Card, ACH, and Wire remittance emails sent to suppliers, as shown below.



For questions, please reach out to your account manager or [support@finexio.com](mailto:support@finexio.com).

