

DIRECTORS

Setup Account + Manage Payments

- Org Tools > Accounts > + New Account
- Add Contact Information
- Add Permissions

- Save
- Close and go to account directory
- Send Email Login Instructions

	Phone	Work Phone	Account Status	Last Wallet U...	Last Activity	Ro
* Last n...	0000000000		Active			No
Last na...	0000000000		Active			No
Mobile	0000000000		Active			No
Nyholo...	0000000000		Active			No
Request Mobile/SMS Verification	0000000000		Active			No
Email Payment Setup	(518) 245-6259		Active		03/04/2025	No
Invite to Mobile App	skalla@outlook.com		Active		04/10/2025	Di

Setup Account + Manage Payments Video

Director View Video

Add Payment to Director Account

- Click on directors name
- Go to Billing Summary
- Click Yellow Charge Button > Add Charge Item, Type, Category, Amount, Due Date.
- Either Charge or Charge and Pay if you already received the payment.