

# The Colorado Trust Payment Portal Guide

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## Register for the Payment Portal

Before you can access the payment portal, you must register for it. If you are a grantee, a member of our staff will register you. If you are a new vendor, complete [this simple form](#) to register. Only complete this form once per organization. Once you are registered, you will receive an email invite with instructions on how to finish setting up your account.

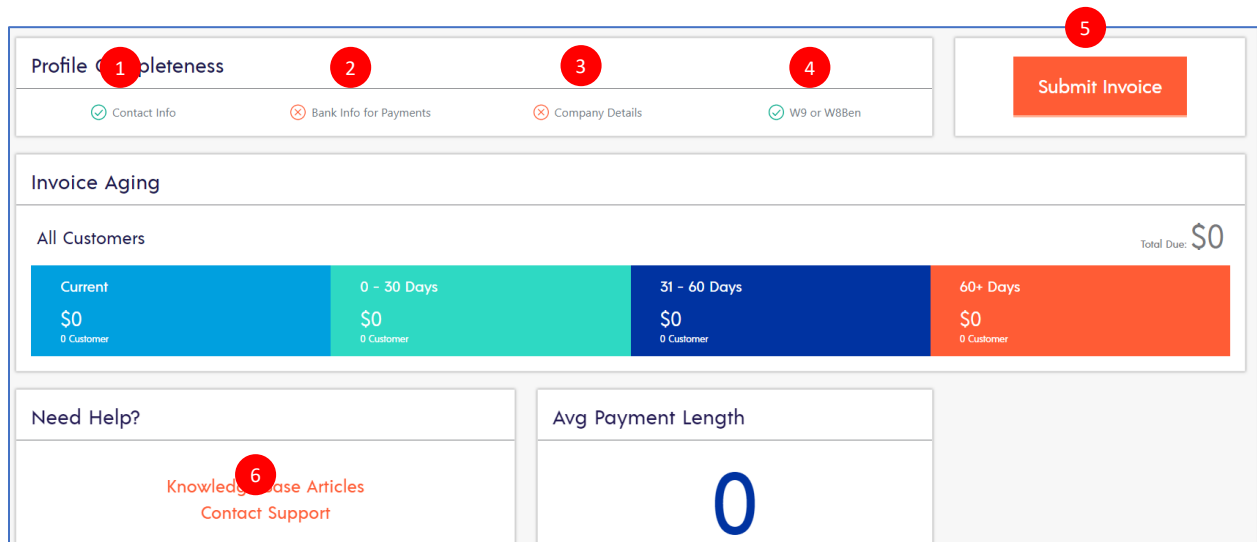
## Logging into the Payment Portal

To log into Corpay, go to [app.accrualify.com](http://app.accrualify.com) and log in with the email address you registered with and the password you created when setting up your account. If have forgotten this password or are setting up your account for the first time, take the following steps to set your password:

1. Go to [app.accrualify.com/reset\\_password](http://app.accrualify.com/reset_password).
2. In the email textbox, enter your email address.
3. Click **Send Reset Instructions**.
4. You will receive an email with a link to **Change my password**. Click this link.
5. Enter the password you would like to use for your Corpay account. Click **Set password**.
6. You will be redirected to the Corpay log in page. Log in using your email address and the password you just created. Make sure to securely record this password so that you can use it to log into Corpay in the future.

# Payment Portal Dashboard

When you log into the payment portal, you will see the following dashboard:



1. **Contact Info:** Click to update your contact information, such as name and email.
2. **\*Bank Info for Payments:** This must be completed before you can receive payments from The Colorado Trust. Click to add or update your payment information. See the [“Adding or Updating your Banking Information”](#) section for more information.
3. **Company Details:** Click to add or update company information, such as address and tax id.
4. **\*W9:** This must be completed before you can receive payments from The Colorado Trust. Click to add or update your W9. See the [“Adding your W9”](#) section for more information.
5. **Submit Invoice:** Click to submit an invoice directly from the payment portal. This is optional. You can also submit invoices via email. See the [“Submitting an Invoice via Email”](#) and [“Submitting an Invoice via the Payment Portal”](#) sections for more information.
6. **Contact Support:** Click to contact Corpay support. See the [“Need Help?”](#) section for more information.

## Adding or Updating your Banking Information

You must add your banking information before you can receive payments from The Colorado Trust. After adding this information, you can log into the payment portal at any time to update it.

The screenshot shows a 'Banking Information' form. At the top right is a '+ Payment Method' button (callout 2). Below the title is a sub-header 'Add all available payment methods to this list. You will need to assign eligible accounts in your customer detail pages in order to receive payments.' The 'Payment Type:' dropdown menu is set to 'ACH - Bank Account (USA)' (callout 3). Below this is the question 'How would you like to upload your ACH information?' with a radio button selected for 'Automatic (Preferred)' (callout 4). At the bottom right are 'Cancel' and 'Submit' buttons (callout 5).

1. Click **Bank Info for Payments** from the [Payment Portal Dashboard](#) to open the above window.
2. Click **+ Payment Method** in the upper right.
3. Under **Payment Type**, choose **ACH – Bank Account**.
4. Choose how you would like to upload your ACH information:
  - a. **Automatic (Preferred)**: Allows you to securely sign into your bank online and then automatically pulls in your ACH information. This is the simplest and most accurate way to add your ACH information. If you choose this option, click **Verify Account > Continue**, choose your bank, and then sign into your bank’s online account.
  - b. **Manual**: Allows you to manually enter your ACH information into a form.
5. After automatically or manually uploading your ACH information, click **Submit**.
6. It will ask you to link the method to a customer. Choose The Colorado Trust and click **Link**.

## Adding your W9

You must add your W9 before you can receive payments from The Colorado Trust.

The screenshot shows the 'Documents' section. At the top right is an 'Upload' button. Below the title, there is a section for 'The Colorado Trust' with a 'W9' button (callout 2) and a '+ Add' button. Below that is another section for 'Other Documents' with a '+ Add' button.

1. Click **W9 or W8Ben** from the [Payment Portal Dashboard](#) to open the above window.
2. Under **Documents**, click W9.
3. In the window that pops up, choose one of the following options:
  - a. **Choose File**: Allows you to upload an existing W9 that you have already completed and saved. Choose this option if you have a W9 document readily available for upload. After uploading the pre-completing W9, click on the document name and then click **Submit** in the lower right.
  - b. **Forms > W9**: Allows you to create a W9 directly within the portal. Choose this option if you do not already have a W9 completed and saved as a document. After completing the W9 form, click **Submit** at the top of the page.

## Submitting an Invoice via Email

The easiest way to submit an invoice to The Colorado Trust for payment is via email. Attach the PDF invoice to an email and send it to [invoice@coloradotrust.org](mailto:invoice@coloradotrust.org). It must be attached to the email as a PDF. An image, word document, or link will not work. You can also email it in any form to your internal contact at The Colorado Trust, and they will submit the invoice for you.

## Submitting an Invoice via the Payment Portal

The easiest way to submit an invoice is via email, as described above. However, if you would like, you can submit an invoice for payment directly within the payment portal.

The screenshot shows a web form for submitting an invoice. At the top right, there is a dashed box containing the text "drag and drop invoice file here to upload" and a blue "Upload Invoice" button. Below this, the form is divided into several sections. On the left, there is a "Payment Account" dropdown menu with a search prompt. Below it is a "Customer" dropdown menu with "The Colorado Trust" selected. Further down are fields for "PO Number" (with a search prompt), "Invoice Number", and "Additional Details (optional)" (a text area). On the right side, there is an "Attached Files" section showing "- no attachments -". Below that is a "Service Period" field with two date pickers and a "to" label. To the right of that is a "Currency" dropdown menu. Below the "Service Period" and "Currency" fields are "Amount" and "Invoice Date" fields, both with a dollar sign and a date picker. At the bottom right of the form is a blue "Submit" button. Red circles with numbers 1 through 6 are overlaid on the form to indicate the steps: 1 is on the "Submit Invoice" button (not visible in this crop), 2 is on the "Customer" dropdown, 3 is on the "Payment Account" dropdown, 4 is on the "Upload Invoice" button, 5 is on the "Invoice Number" field, and 6 is on the "Submit" button.

1. Click **Submit Invoice** from the [Payment Portal Dashboard](#) to open the above window.
2. **Customer:** Choose The Colorado Trust.
3. **Payment Account:** Choose which account to get paid at.
4. **Upload Invoice:** Click to upload the invoice for payment.
5. Fill in the **Invoice Number**, **Amount**, and **Invoice Date**.
6. Click **Submit**.

## Tracking Invoice Status

To track the status of your submitted invoice, click **Invoices** from the menu on the left, find the invoice you are looking for, and look at the status column. Here is what each status means:

1. **New:** The invoice has just been submitted and has not yet been reviewed.
2. **Pending:** The invoice has been reviewed and is going through the approval process.
3. **Open:** The invoice has been approved but not yet processed for payment.
4. **Paid:** The invoice has been processed for payment. Click **Payments** from the menu on the left to track the status of the payment itself.

## Need Help?

The fastest way to get help is by contacting Corpay's support team. You can do this by clicking **Contact Support** from the [Payment Portal Dashboard](#) or by emailing [completevendor@corpay.com](mailto:completevendor@corpay.com). You can also get support from The Colorado Trust's IT team by emailing [IT@coloradotrust.org](mailto:IT@coloradotrust.org).