FEEDBACK SUMMARY:

- Labels are confusing
  - "Payment Amount" makes sense in the editable screen, doesn't make as much sense in the Select PM Screen
    - maybe Subtotal , Invoice amount or Document amount.
- Need to show invoices from oldest to newest
  - maybe expose a filter so user can choose how the invoices are displayed?
    - ie. "highest due" // "invoice due date oldest to newest"
- Need to add CVV2 field to the Saved Cards section
- 50 invoices might be too many?
  - thinks 20 or less invoices — when you get past a certain point, might be difficult to scroll thru that many invoices without making a mistake, where the portal could come into play
  - don't want to marginalize the portal since its a good selling point
  - 15-20 invoices seems like a lot to pay thru email pay
- Wanting to see all invoice #s
- Updated all text fields to 50px on mobile

ART

- likes the status — past due in red that are selected already
- wants the order to be oldest to newest (past due)
  - day of or past due
- anything over 5 shows blue to indicate a grace period
- looking at a credit card statement POV - knowing you have to make a payment, is telling us that and it the priority should be pushed to the top
- likes that you can adjust
- question: will it be pulling the invoice # from the ERP —
- didn't immediately seem like he could tell that remaining balance was in play for calculating the payment amount
  - likes that its automatically pulling what's remaining
  - maybe change payment amount to remaining amount
  - wants to maybe show how much that they've paid
    - not going to go in and select, wants to have it accounted for already
- likes the pay screen
  - art wants the ebizcharge to be configurable to be the merchant's logo
- Payment Breakdown
  - payment amount — the actual requried amount that the merchant is requesting based on services rendered
  - surcharge — CC fee displayed
  - thinks its very clean and simple
  - is there any way to highlight "new card"
    - if people aren't looking for it, they won't see it
    - wants new card to be bigger/bolder so its more evident that its an option
- Receipt Screen
  - list of the invoices — wants to see a breakdown
  - asking: would the email receipt show a list of the invoices paid
    - if it shows — shows the # of invoices, but would want to know the invoices. want to confirm what those were and have record of it
    - should be displayed here
    - verbiage that it will be included in their email
  - wants to make the helper text bigger & darker so its more obvious (the separate commas)

TIFFANY

- Wants the Total Amount to update as you check and uncheck the checkbox icons
  - do like the color coding on status pills to show which ones are overdue
  - likes that due date — automatically are doing the paymenbt amount on whats remaining amount
  - invoice 2 & 3 — should be remaining balance
    - make sure the dummy data is correct
  - was easy to find the total and remaining balance
- was easy to adjust the payment method of inv #5 to $500
- saved card ending with 2094
  - had difficulty finding it in the dropdown
- selected new card tab
- Payment Amount
  - Total Amount - is total that's going to be surcharge — adds the total together
  - would call the first section "payment amount" — thinks its a little confusing:
    - "change Total Amount to Payment Amount"
  - thinks that "Payment Amount" is not correct as a label when adding surcharge
    - Payment Amount could be "Invoice Total" or "Subtotal"
- Receipt Screen:
  - wants to list the invoice #s
    - want to list all of the invoices
    - Auth Code & Date Paid are fine
    - Total Paid is not the right amount ($250.00)
    - would try to list the invoice #s
  - can add multiple emails to the receipt (comma separated)
- General Thoughts
  - get rid of the extra space on the bottom

JIMMY

- Clicking around, expanded the caret
- "Invoice Total would be nice to know at a glance, but it might not be thaat relevant"
- Not sure if "Payment Amount" is right
  - there's amount due — but they're choosing the payment amount, so it makes sense
- Was easy to find the invoice total and remaining balance
- added invoice #5 easily
  - is already $500
- Paying with save card
  - look at dropdown list
  - can't scroll it but sees the one
  - not seeing a place to enter in security code
- Selected New Card Tab
  - cliked through the field
  - had trouble thinking between september and 09 lol
  - everything is filled out and looks easy
- noticed the surcharge banner
  - might be interesting idea if surcharge also had a hyperlink indicator or a question mark next to it that scrolls the user back up to the banner
  - just the nature of the mobile
- Payment Amount - what's due for the invoices due for the invoices they selected
  - surcharge is additional fee i get for the surcharge
  - labels all seem fine to him
- pay the button at the bottom
  - tried to add additional users to the email receipt
  - if theres a surcharge amount would like to see it again
  - could potentially which invoices were displayed up to a certain limit
    - would prefer the # (up to whats reasonable) instead of "multiple"
    - "comma and a space"
    - "it's not easy to relay that in a nice way"
- Overall thoughts
  - none

COURTNEY

- things are pre-checked
  - assuming things are sent by past due
  - user could select and continue if they wanted
- thinks that its filtered by invoice #
  - would like invoices filtered by due date - customer can see what is due and coming up first
  - had to scroll down to see which ones were due
  - as someone who has a short attention span, wouldn't look
- opened up the caret
  - invoice total is 3600, remaining balance is 2600
  - knows she can override it
- easy to select saved card
- usually on webform, usually can't use saved cards
  - merchants sometimes will switch names of customers instead of creating a brand new customer
    - the new customer who is taking over that new record — they will inherit the old customer's payment methods
- seemed easy to select all information
- payment amount breakdown
  - payment amount — documents that shes paying (invoices here)
  - surcharge — the fee that merchants are assessing over the totals
  - payment amount is a bit confusing — invoice amount or document amount.
  - sounds like payment amount + surcharge is still the payment amount
- assuming that if shes ends a copy of her receipt — would she be able to see the number of invoices there
  - wants to see the invoice #s
  - putting in auth code
    - most merchants are looking for transaction ID, not authcode
    - some ERPs come in as transaction ID and the payment ref# will reference it
  - acumiatca- payment reference # on the document is the transaction ID
  - auth code doesn't mean anything for any document
  - if could put both
- thinks its great
  - has tons of people asking for this
  - want people to not have to have a login but to pay multiple invoices
    - esp in acumatica!

ANDREW

- opened and closed the acret
- was expecting to see the invoice amount due
- it's just showing "payment amount" not showing payment amount due
  - doesn't know what amount he should be putting there
- total amount has changed, thinks its because of tax
- saw the scroll bar - thought there were more payment methods to scroll
  - the dropdown is very small - only had options to show 3 payment methods
  - need to remove the scrollbar
- Payment Amount - amount towards invoices that he's paying
- Surcharge - thinks its tax
  - both are added up to be the Total Amount and how much he'll be charged in total
- thinks "Payment Amount" is a little confusing
  - he's paying more than 8700 after surcharge is being added
  - would expect "subtotal" or something else
- if he could click "Multiple" and it would expand and show the list of invoices that he paid off
  - perhaps a dropdown that expands to show that information
- when it said "Total Amount" in the beginning — but then once total amount has changed once you get to the second screen
  - the value just randomly changed when he hit continue

SHARON

- organized
- likes how its laid out, scannable
- like the status pills and that they're color coordinated
  - red = urgency
  - yellow = kind of urgeny
  - blue = ur chillin
- initially thought that the icons are swapped
  - thinks that the caret icon was going to minimize not expand
- easy to find saved versus new card
- payment breakdown
  - payment amount — what she's paying from the invoices
  - surcharge - added fee
  - total amount — the total of the payment + surcharge
  - labels: agree with it. likes the hierarchy & the divided line to make it feel like an equation
- Email Receipt
  - likes the # of invoices paid
  - understand why it's multiple - ie. if theres 100 invoices paid, theres going to be sm individual invoice #s listed
    - but is wondering if she's going to have a record somewhere when she emails it to herself
  - wondering — maybe a tooltip or callout could be good in case there are multiple invoices
- comma separated for the emails makes sense to her
- likes the hierarchy of the information

SAM

- sam thinks 50 is a lot
  - thinks maybe 10-20 would be good
- is there a way to change the order to filter by due date newest to oldest
  - column — could change what it sorts by
  - wants to check that oldest to newest is how it actually populates
  - wants the ability to sort by different things ie. "highest due"
- Payment Amount — applied to invoice
  - Labels: thinks its clear
  - Document Payment Amount or Invoice/Sales Order Doc (doesn't feel strongly about it though)
- Recap of the payment and the surcharge amount to confirm that document amount, surcharge amount = total paid
- might be nice to have a summary of the invoice
  - invoice amount of each individual invoices
  - could be configured per merchant
- thinks its clean
  - thinks 20 or less invoices — when you get past a certain point, might be difficult to scroll thru that many invoices without making a mistake, where the portal could come into play
  - too many can get overwhelming, can get confused which are
  - don't want to marginalize the portal since its a good selling point
  - 15-20 invoices seems like a lot to pay thru email pay