DELTA DENTAL®

Invoice Gateway
User Guide

Contents

Welcome!

Please sign in with your user name and password.

When you create an account and pay online, you will have the advantage of having all your future invoices and statements conveniently accessible here. You will no longer receive paper invoices or statements.

Sign In To Your Account

User Name

Password

☐ Remember My User Name

Forgot Your User Name?
Forgot Your Password?

Sign In

Need an Account?   Sign Up Now

Make A One Time Payment
Paying your bill online is easy. Use your bank account to make a one time payment.

Pay

Enrollment Screen

Enroll in Invoice Gateway

1. Click the Sign Up Now button to begin the enrollment process.

   - TIP — The first person to enroll in the account will be considered the Admin for their account.

2. Locate your Enrollment token printed on your bill.

TO SIGN-UP ONLINE GO TO:	http://deltadentalnj.billtrust.com
USE THIS ENROLLMENT TOKEN:	SMW VLS FQB

3. Enter information, including your name, account number, enrollment token with no spaces, email address, user name, password, and security questions and answers.

   - TIP — A confirmation link will be sent to the e-mail address you enter. Therefore: you must have access to this email to complete the enrollment process.

4. Read the subscriber agreement and check the box to acknowledge you have completed reading the agreement.

5. Click the Sign Up button.

6. Click the link in the confirmation e-mail you will be sent to complete the enrollment process.

Account Sign Up Page

Sign Up With Online Billing

*All fields are required unless otherwise indicated as "optional"

Already Have an Account?

[Sign In]

User Information
Enter your full name and email address, then create a user name and password for your account.

Name:

Email Address:

User Name:

Password:

Confirm Password:

Account Information
To verify your account, enter your account number along with the enrollment token found on your bill.

Account Number:

Enrollment Token:

Security Questions
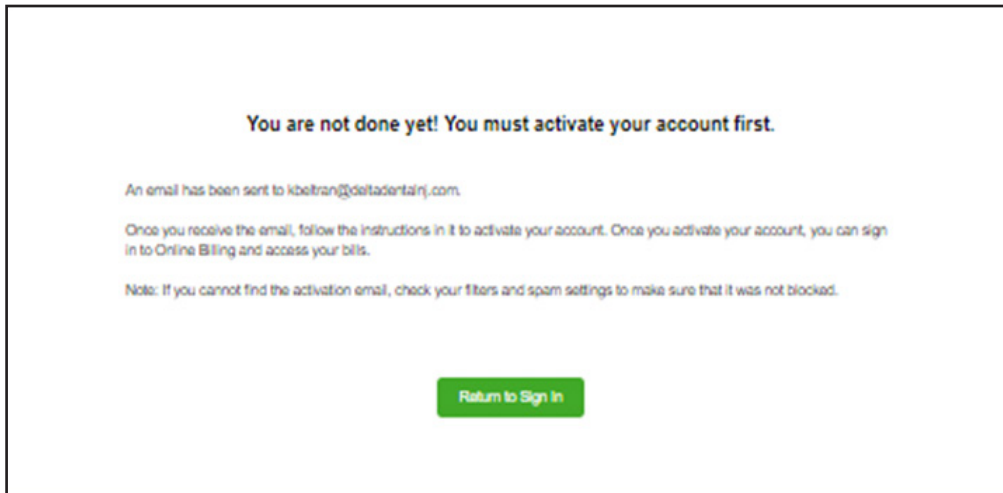Select and answer three security questions.

Security Question 1:   What is your favorite hobby?

Answer 1:

Security Question 2:   Who is your favorite athlete?

Answer 2:

Security Question 3:   Where was your mother born?

Answer 3:

☐ I agree to the Subscriber Agreement

[Sign Up]

You are not done yet! You must activate your account first.

An email has been sent to kbeltran@deltadentalnj.com.

Once you receive the email, follow the instructions in it to activate your account. Once you activate your account, you can sign in to Online Billing and access your bills.

Note: If you cannot find the activation email, check your filters and spam settings to make sure that it was not blocked.

Return to Sign In

Example Activation Email

Invoice Gateway Activation   Inbox   x

support@billtrust.com
to me ▾

Thank you for enrolling for Invoice Gateway with Superior Supply.

To activate your Invoice Gateway account, please click the below link.

If you cannot click this link, you should copy and paste this entire link into your browser or AOL address box and press enter.

https://secure.billtrust.com/superiorsupply1/ig/activate.php?t=123456789HiHQRLGOQNHHJHVDOG

Must click this link to complete enrollment process

Sign In

Sign In To Your Account

User Name

Password

☐ Remember My User Name
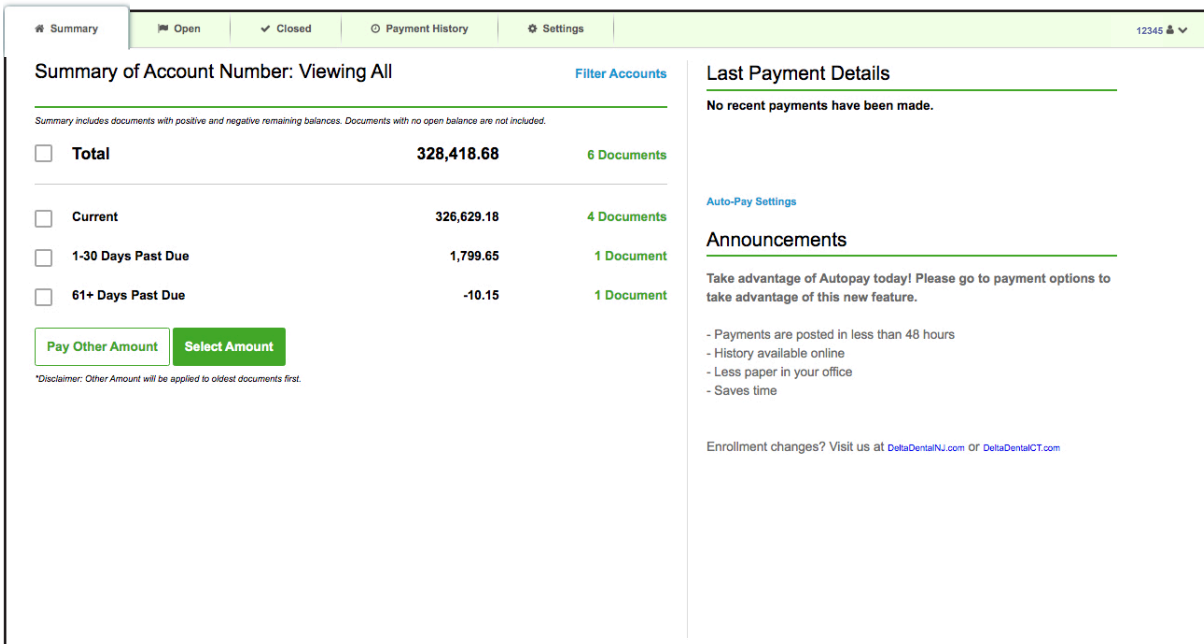
Forgot Your User Name?
Forgot Your Password?

Sign In

After you are enrolled, enter your username and password to sign in to Invoice Gateway. You can retrieve your username or password if forgotten by clicking on the appropriate links.

Summary Page

After you sign into your account, you will be taken to the summary page. This is where you can view your summary of account, last payment details, and announcements.

Last Payment Details

Most recent payment information can be found here if payments are made through the portal.

Announcements

Updates regarding the portal can be found here.
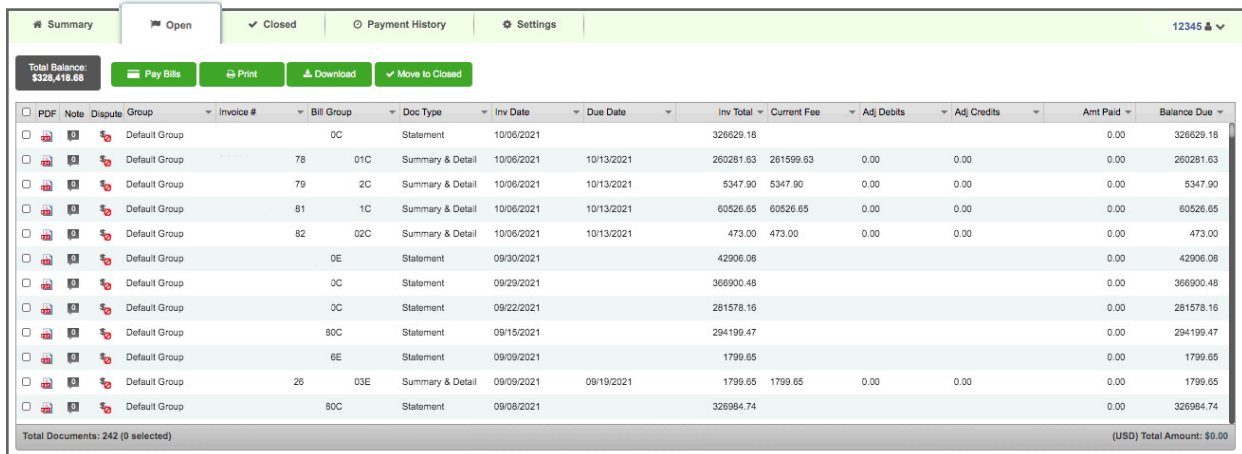
Open Tab

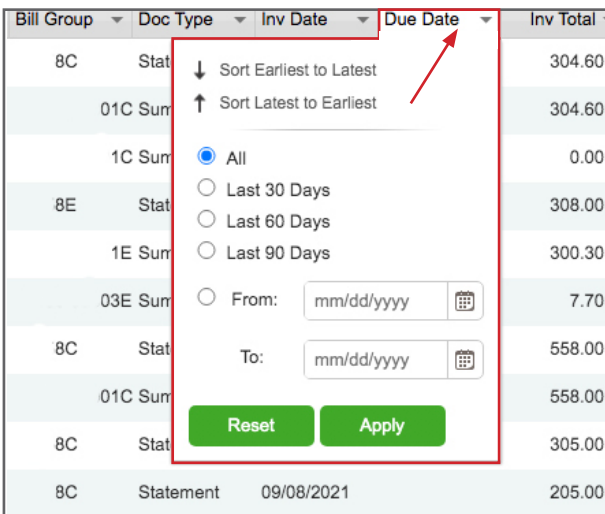This is where you can view your Open and Closed Invoices, Payment History, and Settings. You will be able to select open invoices to pay, make a payment against the account (configurable option), print selected bills, download invoice data to your accounting package, and move selected invoices to the closed tab.
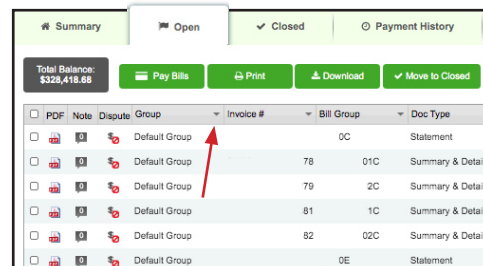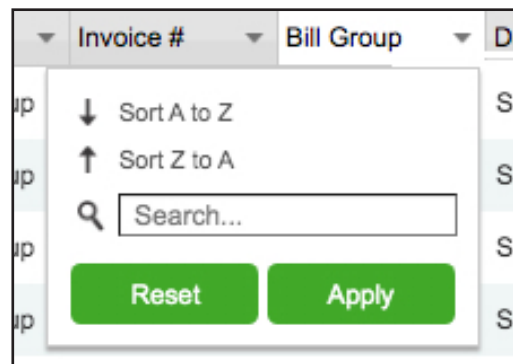

Search/Filter/Sort Invoices

1. Click the icon in the appropriate column.

2. Enter search criteria in the drop-down menu. Columns have different filtering criteria.

View A Copy Of Your Bill

Click the icon on the line of the bill you wish to view.

	PDF	Note	Dispute	Group	▼	Invoice #	▼
☐	📄	0	$⊘	Default Group			
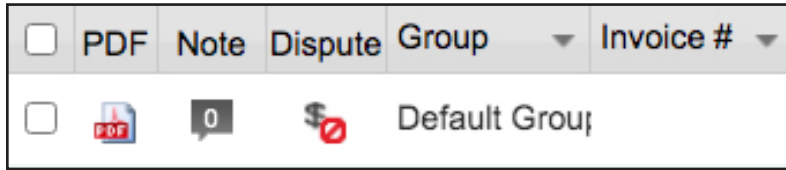
Add A Note

1. Click the 0 icon.

2. Type your note in the pop-up box.

3. Click Save.

   • TIP — These notes are only viewable in Invoice Gateway. Your vendor will not receive a notification of these messages.

Add New Note   ✕

This note is for your reference only and is not visible to Delta Dental New Jersey.

Bill Number:

Bill Date: 10/06/2021

Note:

[   ]

Note: Comments are not shared with Delta Dental New Jersey and can only be viewed within your account.

[Cancel]   [Save]

4. The number in the comment box will now change to "1" meaning one comment has been made. The number will increase/decrease as comments are created/deleted.

5. Click the ▼ icon to view the note.

	PDF	Note	Dispute	Group	▼	Invoice #	▼	PO Number	▼	Inv Date	▼
☐	📄	1 ▼	$⊘	Default Group		F977823		P60200690...		08/13/2013	
		✖ 09/26/2013		BTRUST		This is an example of a note.					

Click to delete comment   Username of person that wrote comment   Comment text
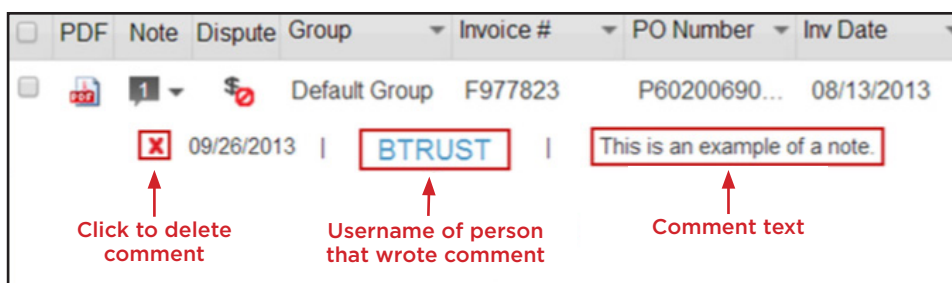
Total Balance

The total balance will populate the total amount of all open invoices.

- TIP — Statement balances are not included in the total balance amount.
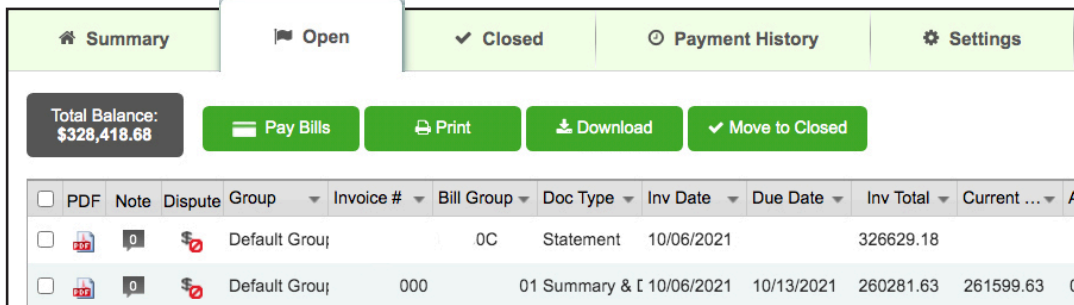
Total Amount

The total amount in the bottom right corner will populate the total amount of the selected invoices,

Navigation — FAQ, Sign Out, Contact and User Agreement

1. Click the ▼ icon in the top right corner to access the FAQ page or sign out of Invoice Gateway.

2. The FAQ, Subscriber Agreement, and the contact information can be found at the bottom of the page.
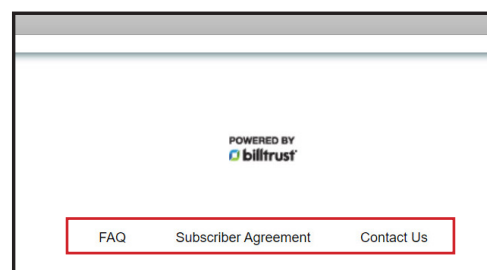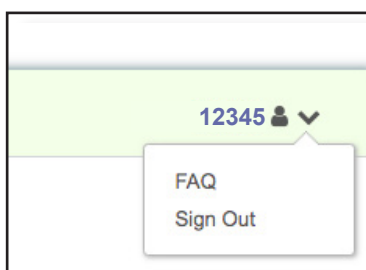
Making Payments

Pay Individual Invoices

1. Select the invoice(s).

2. Click the Pay Bills button.

3. Select Payment Account.

4. Select Payment Date.

5. Adjust Pay Amount or add Deduction/Payment (if enabled).

Payment Amount can be manually changed by entering a new amount in the text box.
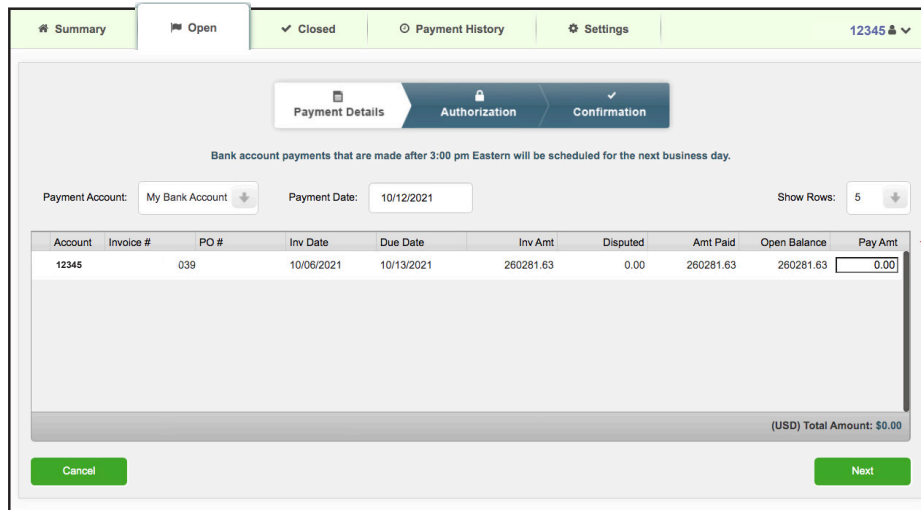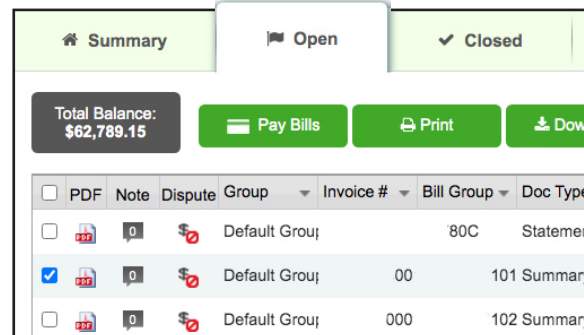
6. Click the Next button.

    a. If you are short paying or overpaying an invoice, a pop up will appear to input your reason.

    b. Select reason from drop-down or enter reason in textbox and click Save.

7. Review Payment information and click Authorize to process the payment.
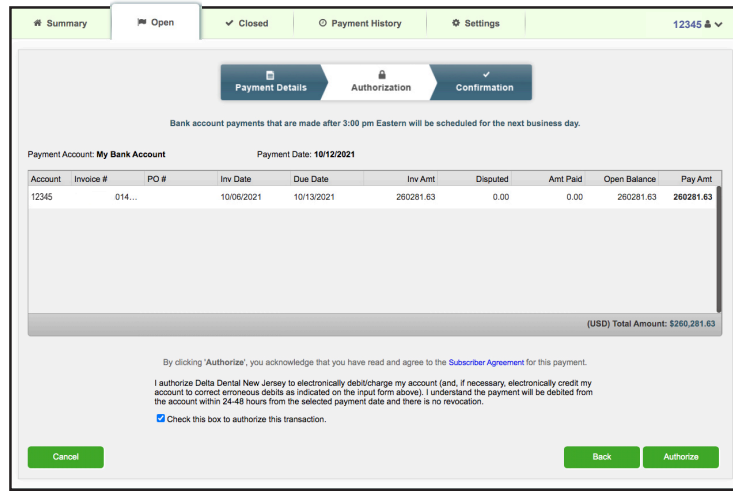
8. Payment is confirmed. Click Print Confirmation link to print receipt of payment.

9. Click the Done button to return to Open Invoices.
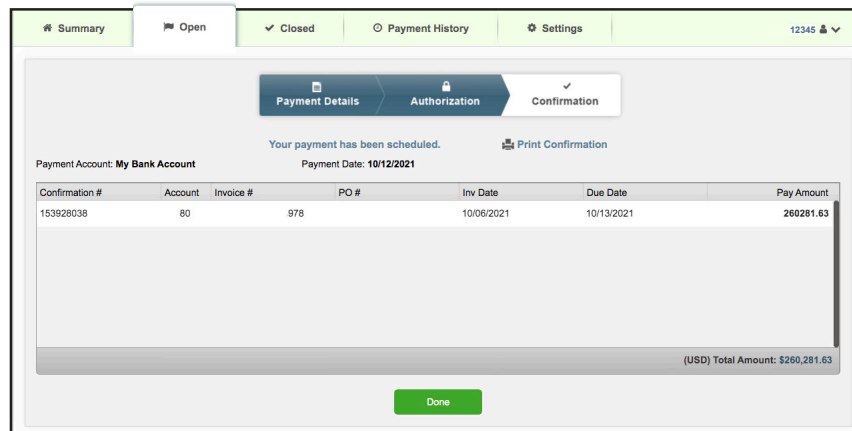
- TIP — If payments are made through the portal, a payment confirmation will be emailed to you if the setting is enabled. To edit this notification, go to the Notification Settings option under the Settings tab.
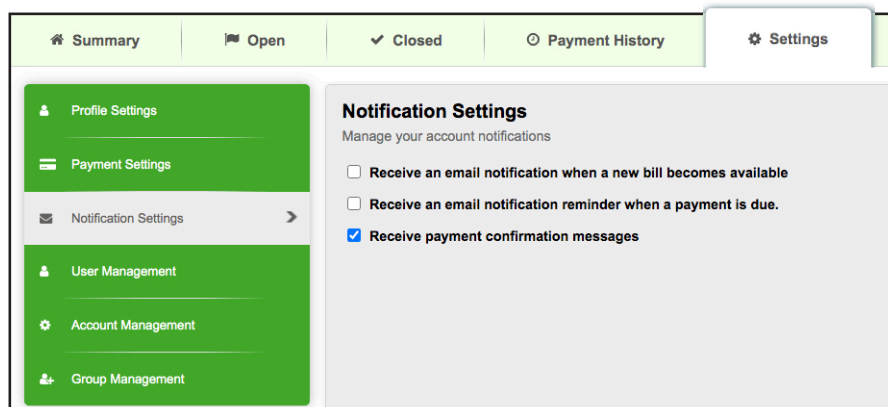
Pay All Invoices

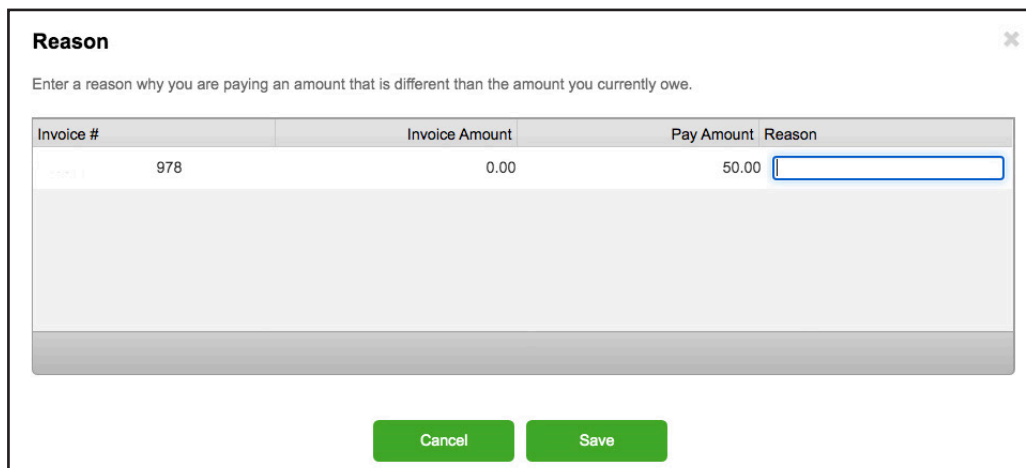1. Select all invoices.

2. Click the Pay Bills button.

3. Select Payment Account.

4. Select Payment Date.

5. Click the Next Button.

Click box for all bills
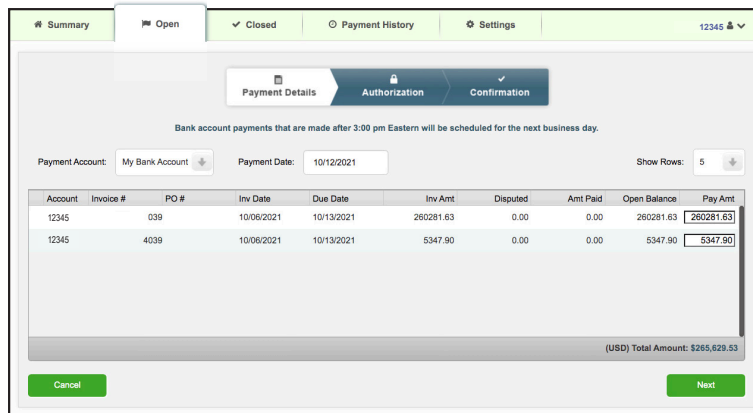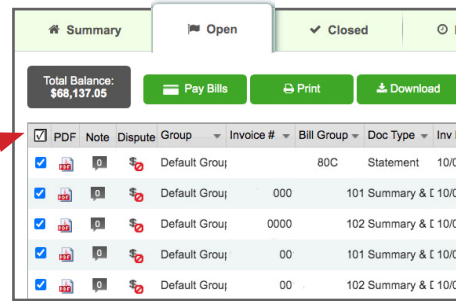
6. Authorize the Payment.
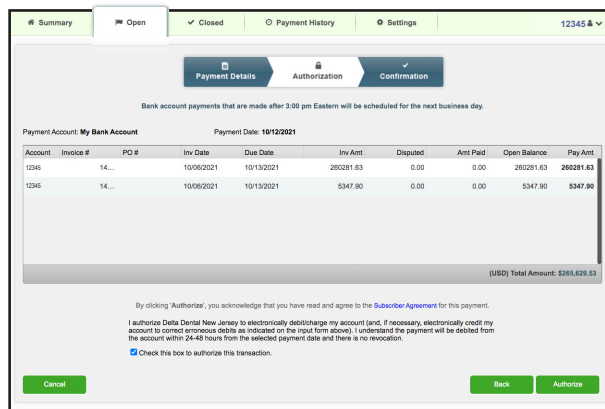
7. Click done and return to Open Invoices.
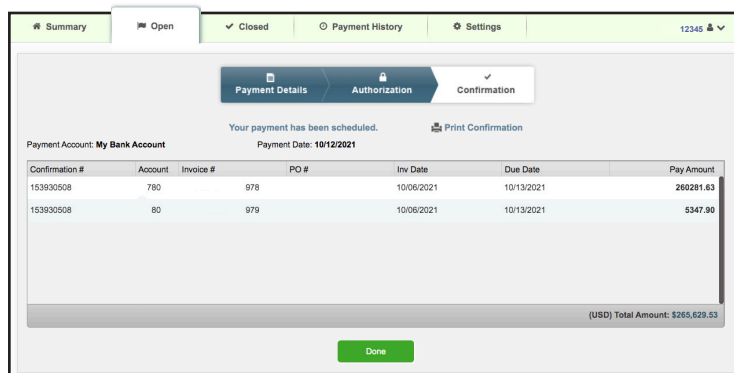
Printing, Downloading, Moving, and Closing Open/Closed Invoices

Print Open Invoices

1. Select the invoice(s).

2. Click the Print button. Clicking Print will consolidate all selected invoices into a single PDF that can be easily printed.

	PDF	Note	Dispute	Group	Invoice #	Bill Group	Doc Type	Inv Date	Due Date	Inv Total	Current Fee	Adj Deb
☑		0		Default Group		780C	Statement	10/06/2021		326629.18		
☐		0		Default Group	014		1C Summary & De	10/06/2021	10/13/2021	0.00	0.00	0.00
☑		0		Default Group	14		501C Summary	10/06/2021	10/13/2021	0.00	0.00	0.00
☑		0		Default Group	014		1C Summary & De	10/06/2021	10/13/2021	260281.63	261599.63	0.00

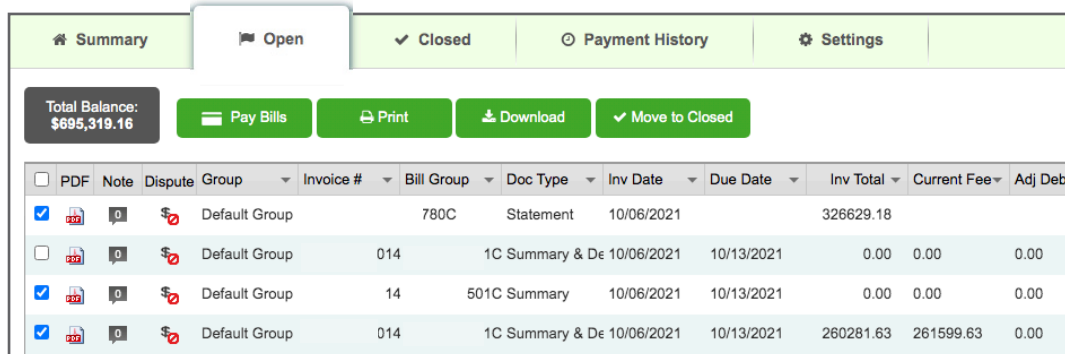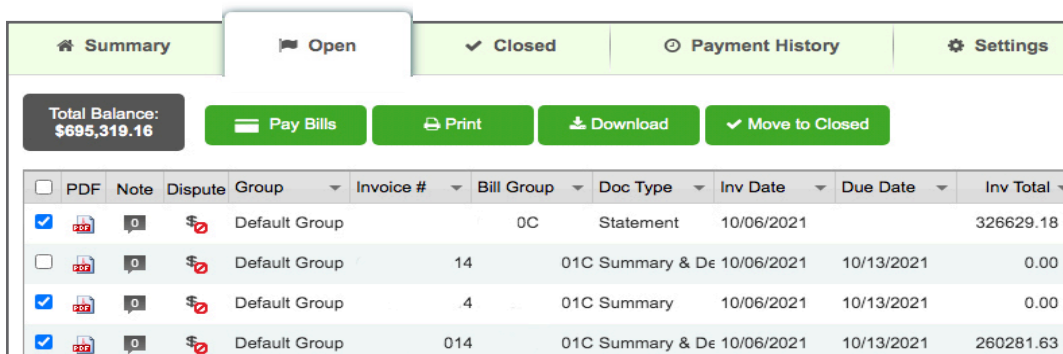## Downloading Multiple Open Invoices for Easy Import

You can generate a data file containing all the invoices you have selected. The data file will contain your invoice information which can be used for import directly into your accounting system. Instead of spending time keying each invoice into your accounting system, you can import the file in just a few steps.

1. Select the invoice(s) you would like to download and click the Download button.

2. Choose your preferred download file format. You can select from any of the packages listed in the drop-down below. For example, you can select a PDF file to create a consolidated PDF, an Excel file (CSV) that can be imported into most accounting systems, or a file format designed specifically to be imported into selected accounting systems, such as QuickBooks. We're always expanding our list of available accounting systems.

	PDF	Note	Dispute	Group	Invoice #	Bill Group	Doc Type	Inv Date	Due Date	Inv Total
☑		0		Default Group		0C	Statement	10/06/2021		326629.18
☐		0		Default Group	14		01C Summary & De	10/06/2021	10/13/2021	0.00
☑		0		Default Group	4		01C Summary	10/06/2021	10/13/2021	0.00
☑		0		Default Group	014		01C Summary & De	10/06/2021	10/13/2021	260281.63

3. Click the Download button.
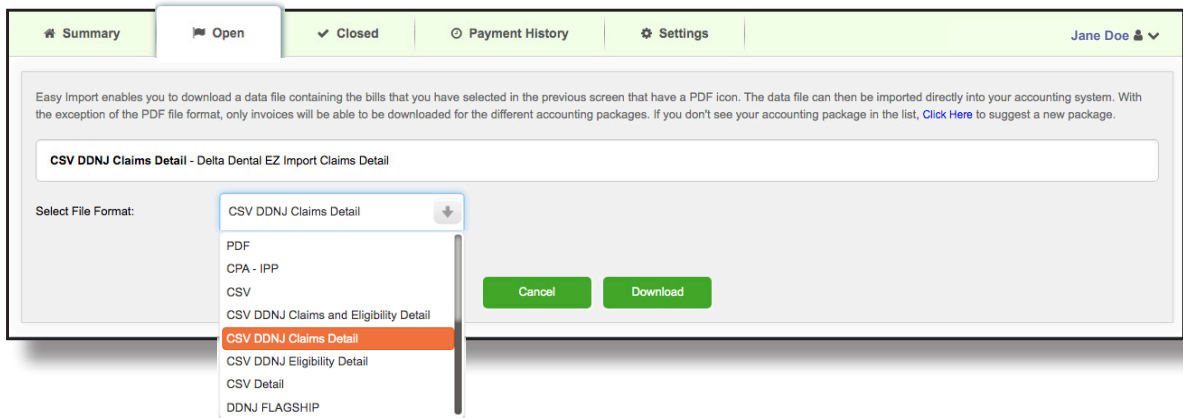
Depending on the accounting package you select, you will want to make sure the Options are set properly for importing into your accounting system. For example, if you use QuickBooks, make sure the vendor name matches how you have the vendor name set up in your accounting system.
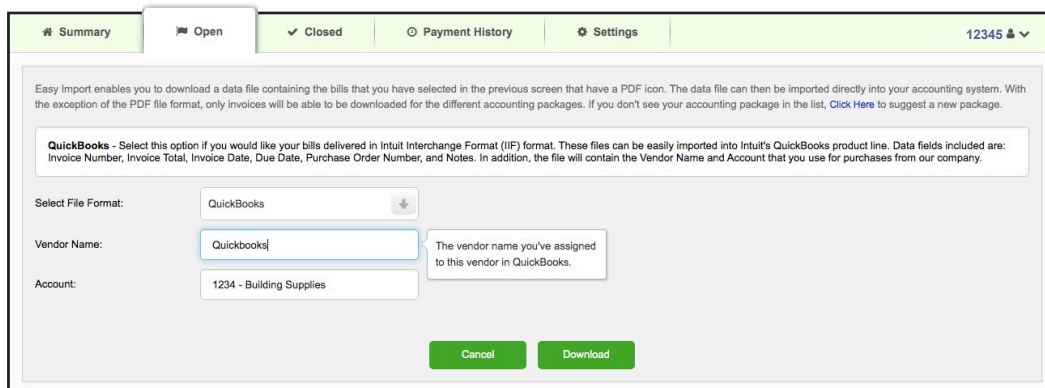
Move Open/Closed Invoices to Closed

1. Select invoice(s).

2. Click Move to Closed button.
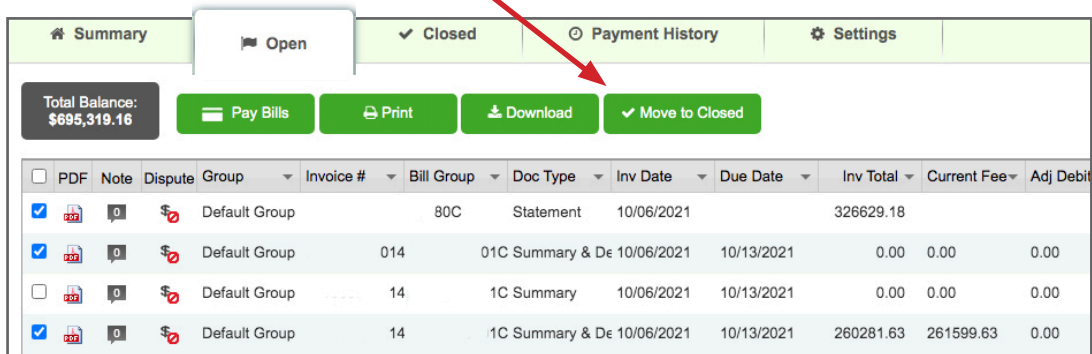
- TIP — By default, invoices that are fully paid through Invoice Gateway will be automatically moved to closed. This option can be turned on/off from the Settings tab under Payment Settings then Payment Option.
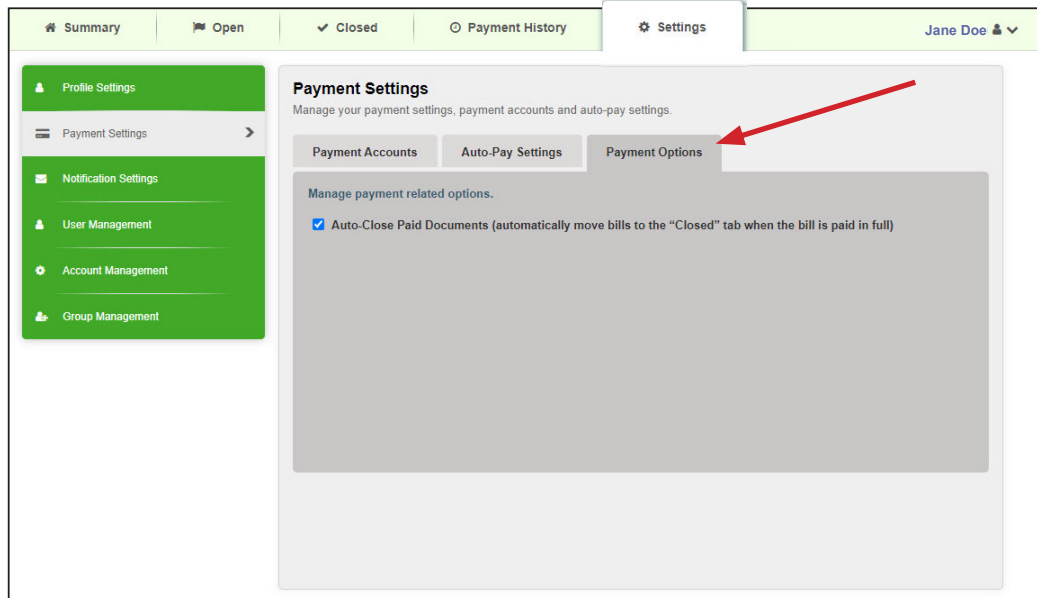
Payment History

The Payment History tab displays all the scheduled, cancelled, or completed payments. This tab will display the Account, User, Created Date, Payment Date, Payment Account, Payment Method, Status, Confirmation Number, Amount Paid, and Actions column.

Modify or Cancel Payment

1. Under the Actions column, you have the ability to modify or cancel a payment by clicking on the Modify or Cancel link.

2. Clicking the Modify link will allow you to cancel payments on individual invoices from the scheduled payment.

Modify Payment (Account 03780)

Invoice #	Due Date	Inv Total	Action
78	10/13/2021	260281.63	Cancel
79	10/13/2021	5347.90	Cancel

Close
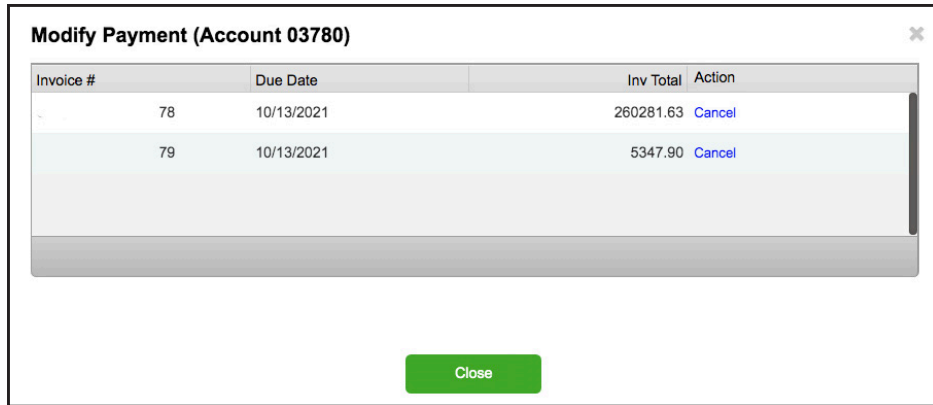
View Payment Details

Click the ➕ icon.

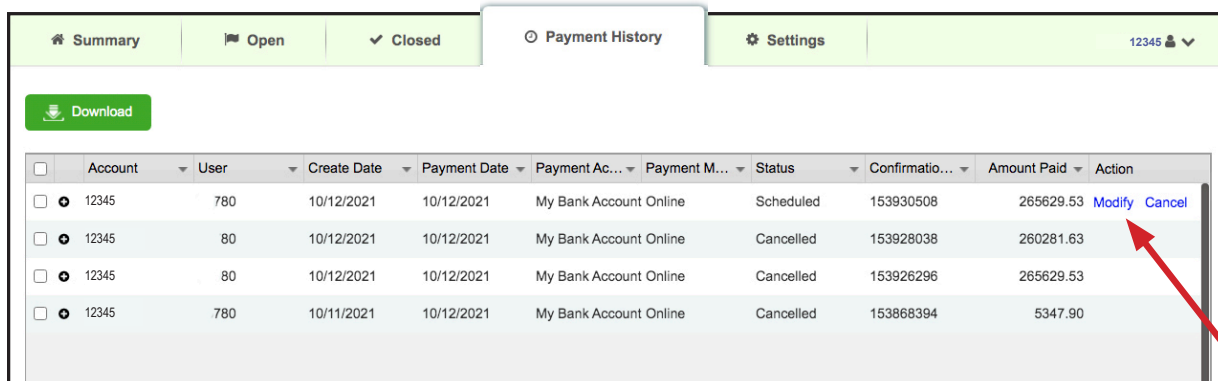|		Account	User	Create Date	Payment Date	Payment Ac...	Payment M...
☐	➕	12345	780	10/12/2021	10/12/2021	My Bank Account Online	
☐	➕	12345	80	10/12/2021	10/12/2021	My Bank Account Online	
☐	➕	12345	80	10/12/2021	10/12/2021	My Bank Account Online	
☐	➕	12345	780	10/11/2021	10/12/2021	My Bank Account Online	

Summary | Open | Closed | Payment History

Download

Payment Details (Account 12345)

Invoice #	Amount	Description
978	260281.63	
979	5347.90	

Close

Easy Import Data Format Descriptions

| Format	Detail
PDF	Allows you to create a combined PDF of the invoices and statements you have selected.
CSV	Select this option to include a comma separated values (CSV) text file of your invoice information with your email. The CSV file format is a delimited data format that has each field separated by a comma with each invoice listed on a separate line. Data fields included are: Invoice Number, Invoice Total, Invoice Date, Due Date, Purchase Order Number, and Notes. See the documentation for your accounting package for information on how to map columns in the CSV file IG 7.0 – User Guide to information in your accounting package.
CSV Detail	Select this option to include a detailed comma separated values (CSV) text file. The CSV file will contain all header and detail information for your invoices and/or statements. Header fields (e.g. Invoice Number, Total Due) will be included on each line of the CSV file. Detail fields (line item information) will be included on the same line as the header information and will be in the order they appear on your invoice or statement. Field headers ending in _COL are the detail fields.
Forefront Construction Suite	The Forefront Construction Suite, from Dexter + Chaney, provides summary invoice information which can be imported directly into Forefront.
Peachtree Premium	Provides you with a data file with line item invoice detail that can be imported directly into Peachtree. When importing data into Peachtree make sure you select "All Fields" in the Peachtree Import interface
Peachtree Quantum	Provides you with a data file with line item invoice detail that can be imported directly into Peachtree. When importing data into Peachtree make sure you select "All Fields" in the Peachtree Import interface.
QuickBooks	Select this option if you would like your bills delivered in Intuit Interchange Format (IIF) format. These files can be easily imported into Intuit's QuickBooks product line. Data fields included are: Invoice Number, Invoice Total, Invoice Date, Due Date, Purchase Order Number, and Notes. In addition, the file will contain the Vendor Name and Account that you use for purchases from our company.
Timberline	Provides you with a data file with line item invoice detail that can be imported directly into Timberline.
Universal Business Language (UBL)	Provides you with a data file that is compatible with UBL 2.0 schema.
Viewpoint Construction Software	The Viewpoint Construction Software interface provides summary and line item invoice detail which can be imported directly into Viewpoint.

Settings

Profile Settings

1. Make edits to your user name, name, email address, and security questions.
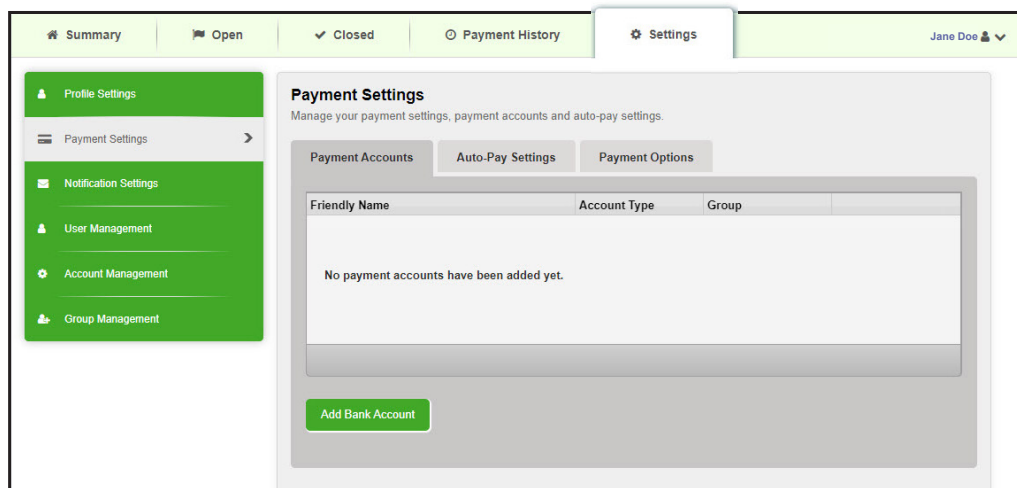
2. Click Save.
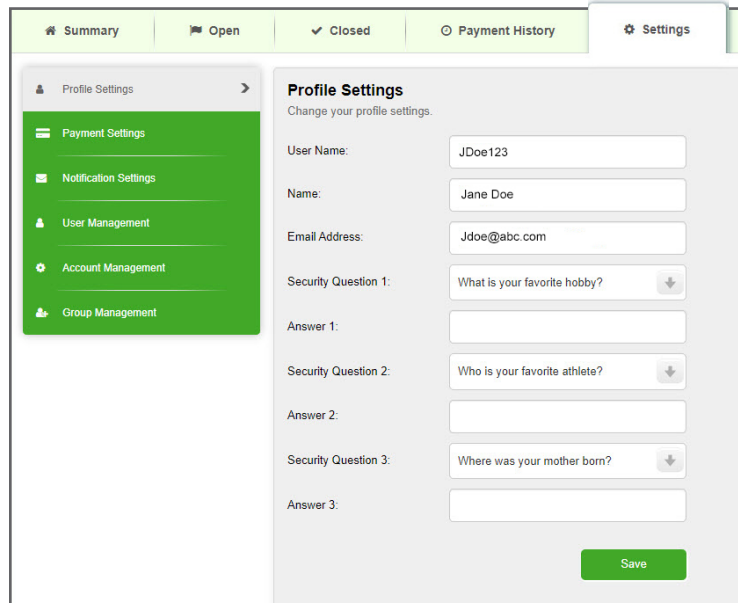
Change Password

1. Enter the current and new password.

2. Click Save.
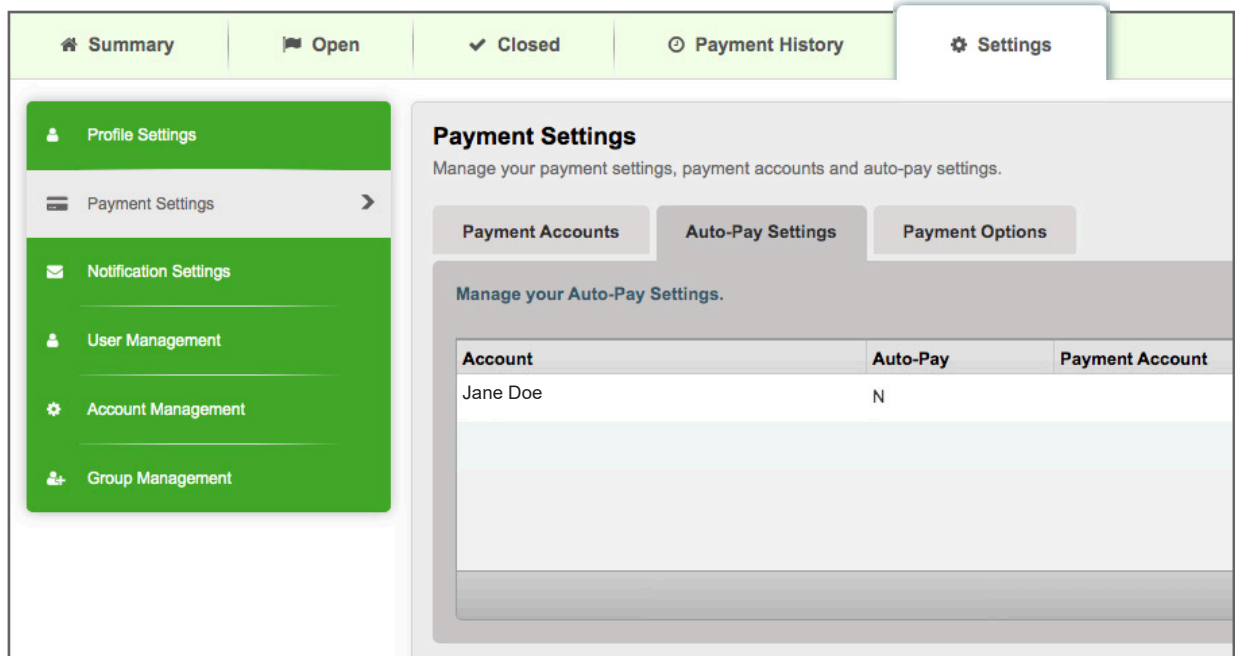
Bank Account (ACH)

1. Under Settings, click the Payment Accounts Tab.

2. Click correct button to add a bank account (ACH).

3. Complete appropriate bank account information.

4. Click Save.

Auto-Pay Settings

1. Choose payment account.

2. Add payment threshold. The payment threshold is the maximum total due for a bill to be paid automatically. If the total due is greater than the payment threshold, the bill will not be automatically paid.

3. Review and agree to terms and conditions.

4. Click Save.

5. Auto-Pay will be scheduled for future invoices only. Any current unpaid invoices will need to be scheduled by the user.

Payment Options

Check box to automatically move bills paid in full from "Open" to the "Closed" tab.
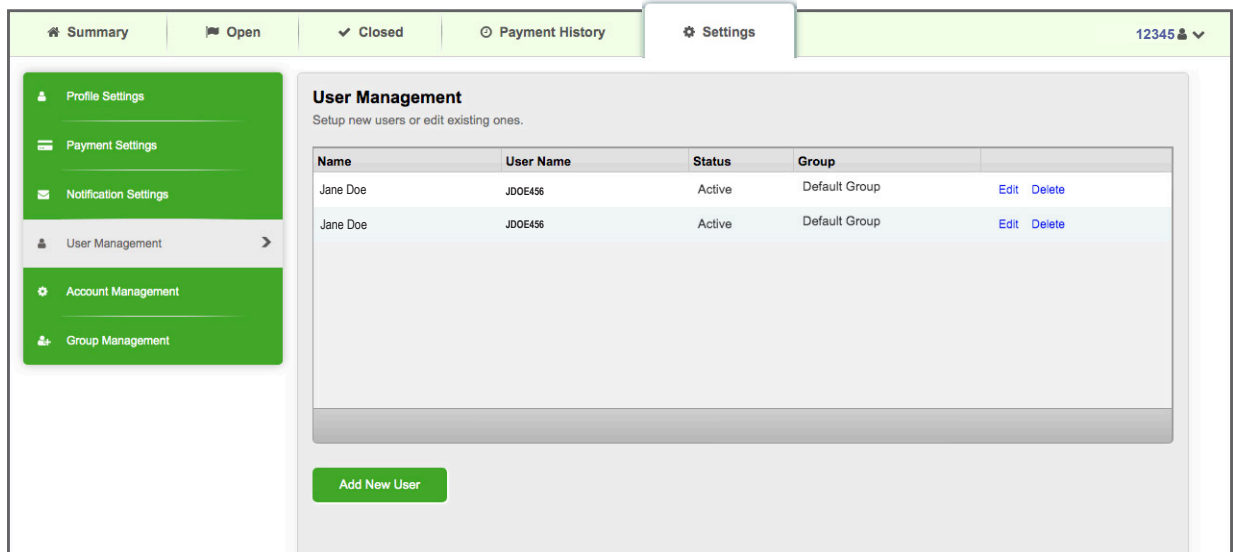
Notification Settings

Check box to turn on notifications.

1. Receive a notification when a new bill arrives.

2. Receive an email notification reminder when a payment is due.

3. Receive payment confirmation.

User Management – Add/Delete/Edit Users (if enabled)
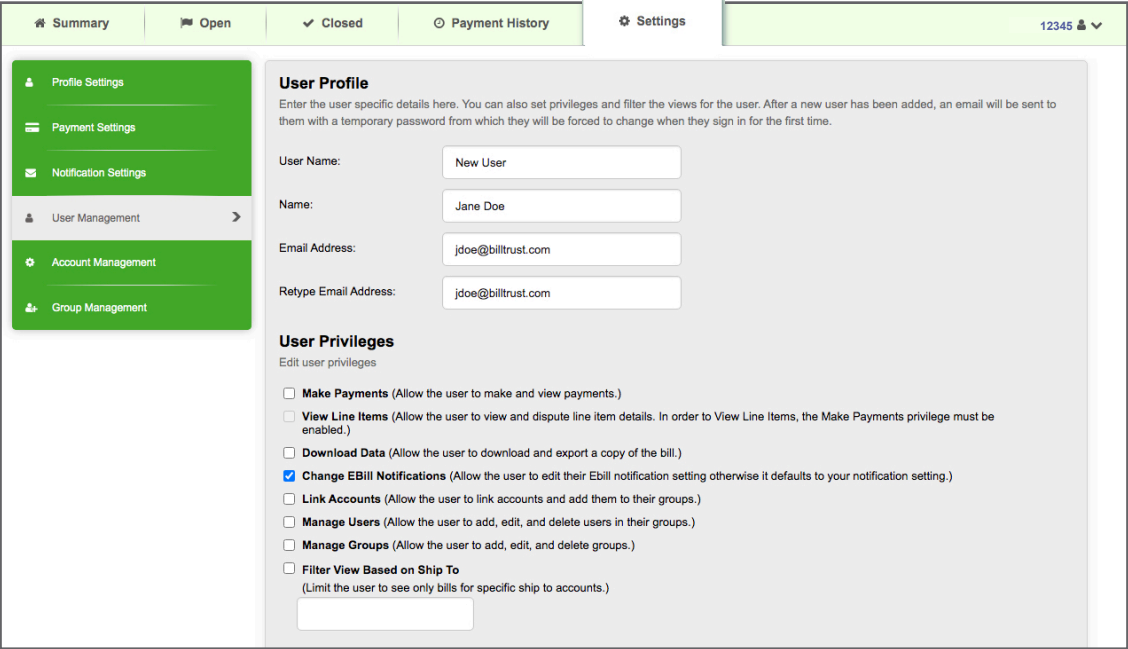
Add a user.

      1. Click Add New User button.

      2. Enter user profile information.

      3. Select user privileges.

            a. Make Payments — Allow the user to make and view payments as well as dispute.

            b. View Line Items — Allows the user to view and dispute line item details.

            c. Download data — Allow the user to download and export a copy of the invoice.

            d. Change EBill Notifications — Allow the user to edit their Ebill notification setting; otherwise it defaults to your notification setting.

            e. Link Accounts — Allow the user to link accounts and add them to their groups.

            f. Manage Users — Allow the user to add, edit, and delete users in their groups.

            g. Manage Groups — Allow the user to add, edit, and delete groups.

            h. Filter View Based on Ship To — Limit the user to only see invoices for specific locations.

4. Click Save. The new user will receive a confirmation email with a temporary password to login.

For assistance using our billing portal: Please call 1-800-452-9310 and choose the billing prompt, or email billing@deltadentalnj.com.