

Beyond Green Solutions, LLC

Uniting Collections, Empathy, & Technology

Documenting Direct Payments

Client Portal

Beyond Green Solutions (BGS) [Client Portal](#) allows businesses to view, modify, and upload account information 24/7. It is fully integrated with the system of records, with changes taking effect almost immediately for our team to react to.

[Client Login](#)

Log In

Your log in will be provided by the BGS team. Please contact your representative for more information. The Portal can be accessed from the [Beyond Green Solutions Homepage](#) or directly at <https://clients.beyondgreensolutions.com/Consumer>

Documenting Payments Received Directly Consumer Search

When consumers pay your organization directly, you can document payments in the Client Portal.

1. From the **Search** (home) tab, find the consumer account.
 - a. Search using **Your Account Number, Consumer Name, Business Name, Identifier, Consumer Number, or Agency Account Number.**

Reference Number	Name	City	State	Zip Code	Email Address	View Accounts
1	Jo...	Rochester	NY	14615		

- b. Click the **Add Transaction** button.

Account Number	Placement Date	Regarding	Paid Balance	Current Balance	Status			
1007903	02/27/2022	442201	0.00	110.00	Open			
Total				\$110.00				

- c. With the Type **"Payment"** enter the amount paid. In the description, enter the date of the direct payment and any other info that is important.
- d. Save
- e. If this is a payment in full, the account will automatically close in our office. Either way, you will see the direct payment on your next invoice.

