

Deltek's Payment Portal User Guide

Deltek

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Do more.®

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DELTEK'S PAYMENT PORTAL OVERVIEW

You may pay your Deltek invoice by ACH/eCheck or credit card using Deltek's Payment Portal, a secure, online payment portal designed to boost your productivity by streamlining your payment process. This portal is available both at <https://paymentportal.deltek.com> and on [Deltek's Customer Connect](#) website.

This secure portal offers the following benefits:

1. **Reduced costs** - no envelopes, stamps or costs to process paper checks
2. More **options** - you may pay by Visa, MasterCard, American Express or ACH/eCheck
3. Insight into your **payment history** - past invoices, balances due and payment amounts are all displayed in the portal
4. Increased **flexibility** - you may designate colleagues as billing contacts and give them access to the portal to pay your firm's invoices. You can schedule payments or setup automatic payments.
5. Opportunity to benefit from credit card **rebate and incentive** programs offered by your credit card company
6. Peace of mind. The payment portal is **secure and compliant** with all electronic payment processing regulations and best practices.

ACCESSING THE PAYMENT PORTAL

There are 2 ways you can obtain access to the payment portal.

1. Navigate to <https://paymentportal.deltek.com> and login via one of the 3 methods below (A. Login, B. Register for an Account, or C. Reset Password) OR
2. On the Customer Connect Site <https://deltek.custhelp.com>, click on the "Payment Portal" drop down option and you will be logged straight in.

A. User Login Screen



- Username is your Customer Connect login user name (normally your work email address).

- Password is your Customer Connect password.
 - Hit the Login button.

B. Register for an Account:



The screenshot shows the Deltek Payment Portal registration page. At the top left is the Deltek logo with the tagline "Know more. Do more.®". At the top right is the text "Payment Portal". Below the header, the page title is "Sign-up Now for Deltek's Payment Portal". A paragraph of text reads: "Please provide the following information so that we may give you access to Deltek's Payment Portal. All fields are required. If we are unable to verify your information provided below we will send an e-mail to the address you have provided below which will allow you to complete your registration." Underneath is the section "Invoice Information" with the instruction "Please provide this information from a recent Deltek invoice." There are three input fields: "Invoice Number:" (with a small "x" icon), "Invoice Amount:" (with a small "x" icon), and "Work Email:". A "SUBMIT" button is located below the fields.

- If you have a correct Invoice Number and Amount and a Work Email that is already on file (you already have a Customer Connect Account), you will be logged straight into the Payment Portal.
- If you have a new Work Email and correct Invoice Number and Amount, you will be prompted to fill in additional Contact Information fields to continue the Registration Process:

Sign-up Now for Deltek's Payment Portal

Please provide the following information so that we may give you access to Deltek's Payment Portal. All fields are required. If we are unable to verify your information provided below we will send an e-mail to the address you have provided below which will allow you to complete your registration.

Invoice Information

Please provide this information from a recent Deltek invoice.

Invoice Number:

Invoice Amount:

Work Email:

We were able to locate your Company information based on the Invoice Number and Amount provided. However we were unable to locate your contact information, please complete the following in-order to register with Deltek's Payment Portal.

Contact Information

First Name:

Last Name:

Title:

Address Line 1:

Address Line 2:

City:

State/Province:

Zip:

Country:

Work Phone Number:

Yes I'd like to receive e-mail communications from Deltek.

- Once you hit submit, a new account will be generated for you. You will be presented with your username and password and will click on the link to login to the portal with your new credentials.
- An email will be sent to your company's primary support contact notifying them that you have created an account for the Payment Portal.

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Notification

As the Primary Support Contact please be aware of the following...

has been added as a Billing Contact to your account on [Deltek Customer Care Connect](#). required this in order to access Deltek Payment Portal to pay your company's Deltek Invoices. Please log in to [Deltek Customer Care Connect](#) in order to manage your contacts.

C. Password Reset:

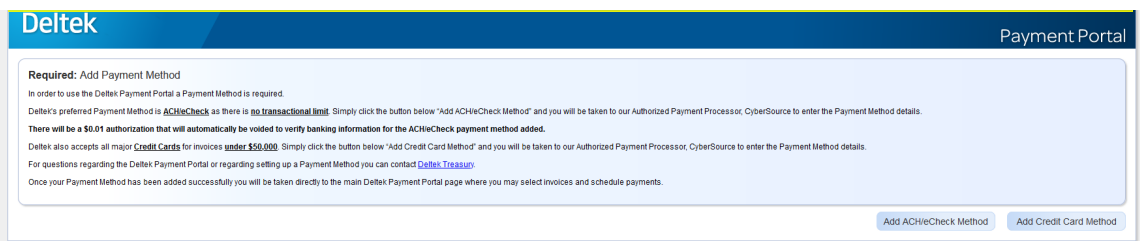
The screenshot shows the Deltek Payment Portal interface. At the top left is the Deltek logo with the tagline "Know more. Do more.™". At the top right is the text "Payment Portal". The main content area is titled "Reset Password" and contains three input fields: "Username:", "New Password:", and "Repeat New Password:". Below these fields is a "Request Reset" button. At the bottom of the form, there is a note: "Please note: Your new password will not be active until you respond to the email that Deltek Inc. has on record for the given Username. If your email has changed please contact Deltek Customer Care at 877.457.7765."

- Passwords must be 8-20 characters, contain at least 1 number, 1 uppercase letter, 1 lowercase letter, and cannot have already been used. {There is help text for the user if you hover over the New Password box.}
- Note to the user at the bottom of the window:
- Please note: Your new password will not be active until you respond to the email that Deltek Inc. has on record for the given Username. If your email has changed, please contact Deltek Customer Care at 877.457.7765.
- Once you enter your username and New Password twice and hit the Request Reset button, you will be sent an email to validate you requested the reset:



- Click the link to return to the login page. Enter your username and your new password and you will be logged into the payment portal. Please note that your username and password are case sensitive.

- Once logged in to the portal, you will be prompted to add a Payment Method that you can use for your payment. Deltek’s preferred payment method is ACH/eCheck as it has no transactional limit. Invoices less than \$50,000.00 can be paid by Credit Card.



- The next screen will allow you to enter the Payment Method details based on the method you selected. As part of Deltek’s commitment to your security, we are using CyberSource’s Secure Acceptance technology to process your payment. The next form will be hosted by CyberSource and is subject to the terms of their Privacy Policy. Once the form is completed with your Billing Information and Payment Details, please hit SUBMIT.
- The screenshot below is how the page will appear when adding an ACH/eCheck Payment Method.

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Billing Information * Required field

First Name * Jane

Last Name * Doe

Address Line 1 * 2291 Wood Oak Dr Ste 100

City * Herndon

Country/Region * United States of America

State/Province * Virginia

Zip/Postal Code * 20171

Phone Number * 555-555-5555

Email * janedoe@deltek.com

Your Order

Total amount \$0.01

eCheck selected [change payment method](#)

Payment Details

Routing Number *

Account Number *

Account Type *

By clicking Pay, I agree to the [Electronic Check Terms & Conditions](#)

[Cancel](#) [Submit](#)

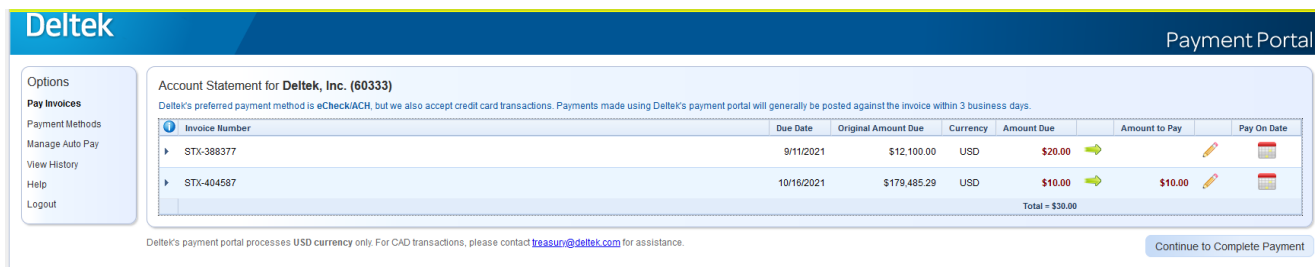
- The screenshot below is how the page will appear when adding an Credit Card Payment Method.

The screenshot displays the Deltek payment portal interface. At the top left is the Deltek logo. The main content area is divided into three sections:

- Billing Information:** A form with the following fields:
 - First Name *: Jane
 - Last Name *: Doe
 - Address Line 1 *: 2291 Wood Oak Dr Ste 100
 - City *: Herndon
 - Country/Region *: United States of America
 - State/Province *: Virginia
 - Zip/Postal Code *: 20171
 - Phone Number *: 555-555-5555
 - Email *: janedoe@deltek.com
- Payment Details:** A form with the following fields:
 - Card Type *: Radio buttons for Visa, Amex, Mastercard, and Discover.
 - Card Number *: [Empty text box]
 - Expiration Month *: [Dropdown menu]
 - Expiration Year *: [Dropdown menu]
 - CVN *: [Empty text box]
- Your Order:** A summary box showing:
 - Total amount: \$0.00
 - Card selected: [Change payment method](#)

At the bottom of the form are two buttons: "Cancel" and "Submit".

- Once your payment method has been added it will bring you to the portal main page which will show outstanding invoices with the oldest on top and the newest at the bottom. If there is a pending payment for a particular invoice, the payment information will show right below it. You can click on the Green Arrow button(s) next to the amount(s) of the invoice(s) that you would like to pay and then hit Continue to Complete Payment. If you mistakenly select an invoice with a pending payment, you will receive a pop-up notification and have the option to continue making the payment or cancel before making a duplicate payment.



WHAT'S INCLUDED IN THE PORTAL?

The portal currently includes invoice activity for customers within North American locations paying in USD. Specifically, the portal contains a statement of all outstanding invoices where Deltek, Inc. is the payee (where the remittance address is P.O. Box 75967). Credits posted to your account will be displayed in the payment portal until they are applied against the original invoices. These credits are not available in the payment portal for transaction processing. Note that only invoices invoiced in USD can be paid in the payment portal.

EASILY SCHEDULE YOUR PAYMENTS

Schedule Pay allows you to schedule an invoice payment to be automatically processed on a date of your choosing, up to the payment due date. If you set the payment date when you receive the invoice – there's no need to return to the portal the scheduled payment will be processed.

- Email confirmations are provided that acknowledge the scheduled payment and again when the payment is processed.



- The site allows credits on accounts to be used. When using a credit you may make a partial payment by hitting the pencil button next to “Amount to pay” and entering the amount that is less the credit amount being used (see screen shot below). To request a credit be applied for you or to create a payment plan please email Treasury@deltek.com. If there is no credit on the account, invoices are only able to be paid in full, the pencil icon would not be functional.

Due Date	Original Amount Due	Currency	Amount Due		Amount to Pay	
6/13/2012	\$3,348.00	USD	\$3,348.00	➔	\$2,000.00	

Auto-pay offers the ultimate in convenience – all your invoices for your company's account are automatically paid via the selected payment method on the corresponding invoice due dates. Auto-pay simplifies payments for companies. No need to log into the portal for each billing cycle – now you can set it and forget it! Note that only invoices invoiced in USD can be paid via Auto-pay.

- As with all payment types, auto-pay transactions deliver a receipt to the email account listed in the account profile each time a payment is processed.

ADDING BILLING CONTACTS

You may extend access to the Deltek Payment Portal to contacts within your organization who are responsible for paying your invoices. You can do this by having them register at <https://paymentportal.deltek.com>. They will need to enter in an invoice number and the invoice amount as part of the registration verification process.

FREQUENTLY ASKED QUESTIONS

Q: Who has access to the Deltek Payment Portal in my organization?

A: All contacts in the Customer Care Connect site can access the payment portal with their email address and a valid invoice number and invoice amount.

Q: Does Deltek charge for using the Payment Portal?

A: No, Deltek will not charge you for using the Payment Portal to make credit card or ACH/eCheck payments. Any costs for maintaining your relationship with your credit card provider are your responsibility.

Q: What are the technical requirements for accessing and using the portal?

A: The Deltek Payment Portal supports the following browsers:

- Internet Explorer 11
- Firefox
- Chrome V62+

There are no other software requirements.

Q: Can I make a partial payment against an invoice?

A: Yes, but only if there is an existing credit on your account. If there is a credit that you wish to apply to your account, you may edit the invoice amounts to be paid by the amount of the credit on your account. To request a credit to be applied to your account or you would like to apply multiple payments to one invoice, please email Treasury@deltek.com. If you have a credit on your account and wish to pay the difference of the total invoice amount and the credit, you will be able to edit the payment amount on an invoice. Within Manage Invoices, after clicking on the green arrow to select an invoice to pay, you can click on the pencil icon to edit the payment amount.

Due Date	Original Amount Due	Currency	Amount Due		Amount to Pay	
6/13/2012	\$3,348.00	USD	\$3,348.00	➔	\$2,000.00	

Q: Are there any limits on how much I can charge using the Payment Portal?

A: Yes, invoices over \$49,999.00 cannot be paid by Credit Card and must be paid by ACH/eCheck. There is NO limit for ACH/eCheck payments made through the portal.

Q: Can a USD invoice be paid using a foreign credit card?

A Payment for USD invoices can be paid using an international address/card as long as the credit card used can accept USD.

Q: How long will it take for a payment made in the portal to be reflected against my Account Statement?

A: Generally, payments made using the Payment Portal will be reflected in the Account Statement within three business days. If you have made a payment on the portal, you can see a listing of these payments by clicking on the arrow to the left side of the Invoice Number.

Q: Can I see a listing of all payments that have been made against my invoices?

A: Yes. Under 'Options', 'View History', you can select a range of payment dates or select individual invoice numbers. If you don't know the full invoice number, you can also enter any portion of the invoice number. Once you click on the magnifying glass, your outstanding invoices will be displayed. In order to see the historical payments details, click on the arrow to the left of the invoice number.

Q: I see that I have a credit on my account that I would like to apply against an outstanding invoice, how can I achieve this?

A: Currently, the Payment Portal system does not allow you to apply credits directly against your invoices, please contact Treasury@deltek.com and provide the credit invoice number and the invoice number that you want to apply it against. Deltek Treasury will contact you with further details.

GovWin related questions

Q. Can I contact my GovWin IQ Account Manager through the customer care portal?

A. No, you will still contact your IQ Account Manager through the IQ web portal, email or phone.

Q. Can I pay for event registration or GovWin IQ reports through the payment portal?

A. No, those will still be accessed and purchased through the e-commerce site on GovWin.com

Q. Can I view invoices on the payment portal?

A. No, you can request an invoice copy by emailing BillingInquiry@deltek.com.

ADDITIONAL QUESTIONS?

If you have a question regarding the invoices included on the Deltek Payment Portal or about the content of your invoices, you can contact your Account Manager or email BillingInquiry@deltek.com.

If you have a question regarding how to use the portal, invoice payments, need to request a refund, or apply a credit on your account, you can email Treasury@deltek.com.

Deltek is the leading global provider of enterprise software and information solutions for professional services firms and government contractors. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. 16,000 organizations and 2 million users in over 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resources, streamline operations, and deliver more profitable projects.

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