



WEST & ASSOCIATES, A PC  
WWW.WESTPATENTLAW.COM

# PAYMENT AND BILLING

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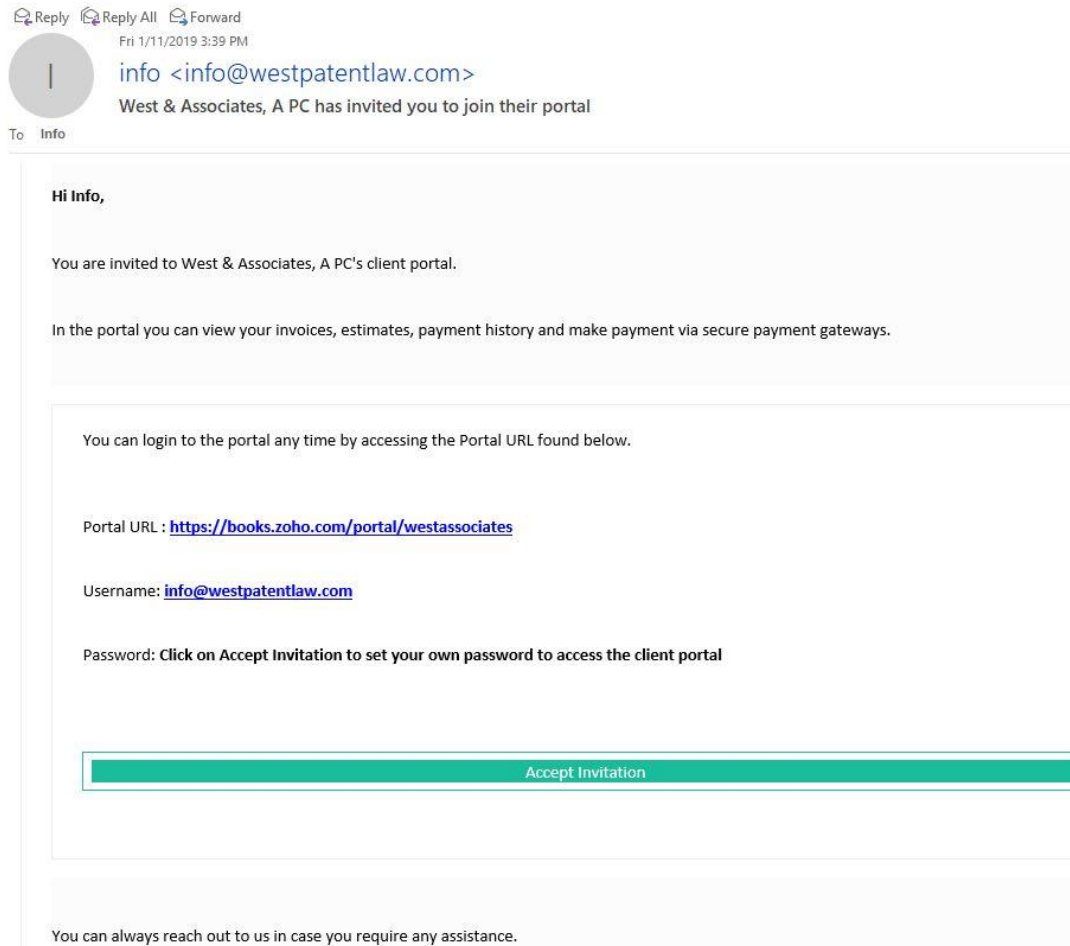
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**VIEWING AND  
UNDERSTANDING YOUR  
INVOICES.**

# JOINING OUR PORTAL

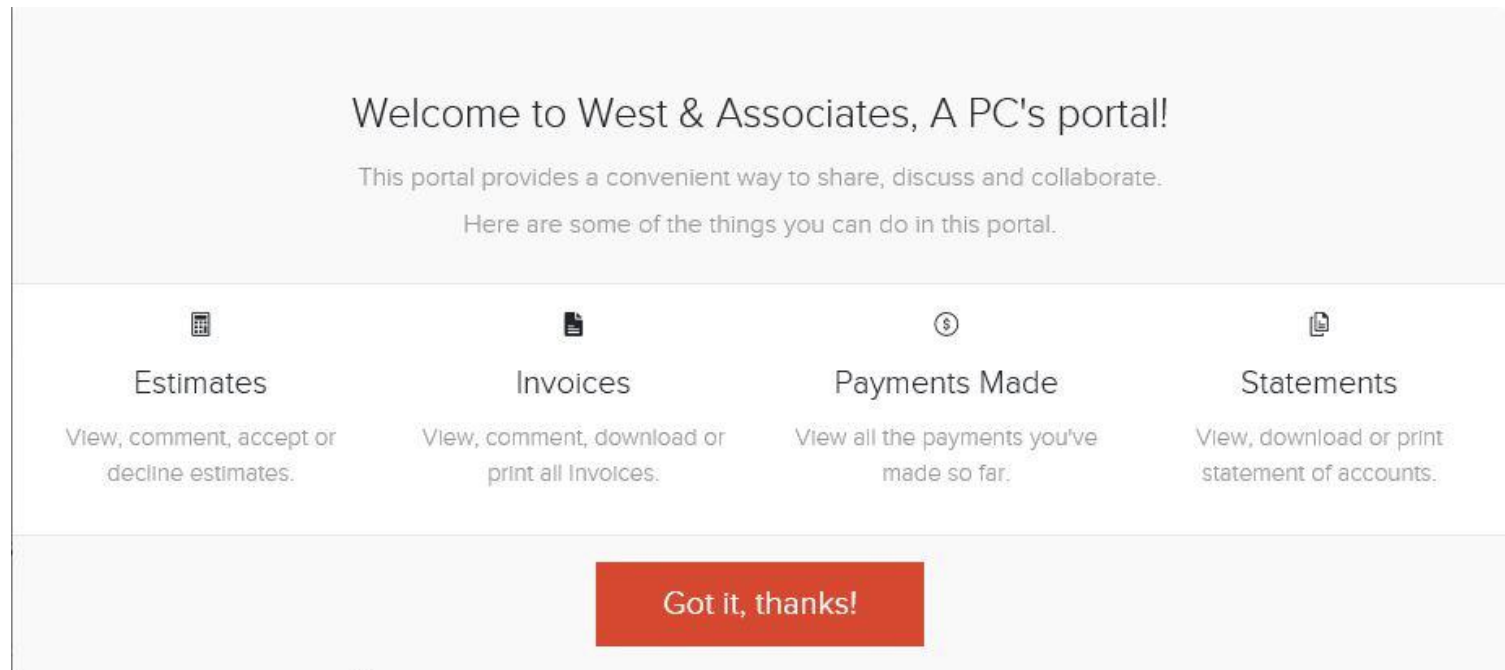
- We create and send out our invoices via Zoho Books, so when we begin working together we will send you an invitation to join our portal. The email will look like this:



The image shows a screenshot of an email invitation. At the top, there are icons for 'Reply', 'Reply All', and 'Forward'. Below these is the date and time: 'Fri 1/11/2019 3:39 PM'. The sender is identified as 'info <info@westpatentlaw.com>' with a circular profile picture containing a vertical line. The subject line reads 'West & Associates, A PC has invited you to join their portal'. The recipient is listed as 'To: Info'. The main body of the email starts with 'Hi info,' followed by 'You are invited to West & Associates, A PC's client portal.' and 'In the portal you can view your invoices, estimates, payment history and make payment via secure payment gateways.' Below this, it states 'You can login to the portal any time by accessing the Portal URL found below.' The Portal URL is provided as <https://books.zoho.com/portal/westassociates>. The Username is [info@westpatentlaw.com](mailto:info@westpatentlaw.com). The Password instruction is 'Click on Accept Invitation to set your own password to access the client portal'. At the bottom of the email body, there is a prominent green button labeled 'Accept Invitation'. Below the email body, there is a footer that says 'You can always reach out to us in case you require any assistance.'

# WELCOME TO PORTAL

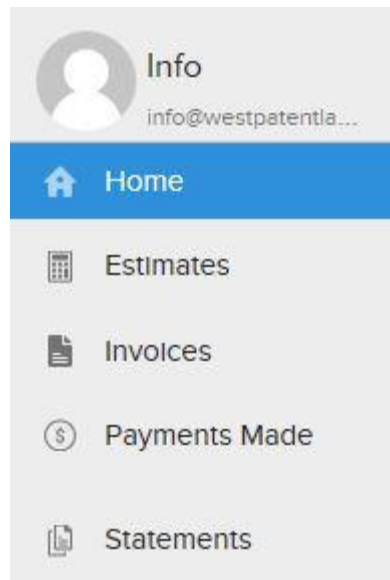
- When you click on the green button to join the portal, you will be taken to a page that looks like this:



- On this site you will be able to view all estimates and invoices we create, as well as your payment history and previous statements.

# NAVIGATING OUR PORTAL

- Whenever you open the Portal site, you will be able to navigate through the menu at the side. This menu can take you directly to whatever you may need.



# ESTIMATES

- When we begin a new project, we will send you an estimate for the costs and fees of the project. You will receive an email with the estimate that looks like this:


Reply Reply All Forward  
Fri 1/11/2019 3:47 PM

info <message-service@sender.zohobooks.com>  
Estimate - EST-000216 is awaiting your approval

To Info  
If there are problems with how this message is displayed, click here to view it in a web browser.

EST-000216.pdf  
41 KB

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Estimate #EST-000216

Dear ,

Thank you for contacting us. Your estimate can be viewed, printed and downloaded as PDF from the link below.

ESTIMATE AMOUNT
<b>\$800.00</b>

Estimate NoEST-000216

Estimate Date11 January 2019

[VIEW ESTIMATE](#)


Regards,  
West & Associates, A PC

# ESTIMATES

- To view and accept your estimate, click on the large green button in the email. You will then be taken to a page that looks like this:

Open

**WEST & ASSOCIATES, A PC**



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West & Associates, A PC  
2815 Mitchell Drive, Suite 209  
Walnut Creek, CA 94598  
Tel: 925.262.2220  
www.westpatentlaw.com

Bill To  
WESTA  
West & Associates, A PC  
Info  
2815 Mitchell Drive, Suite 209  
Walnut Creek, CA 94598

Estimate # EST-000216

Estimate Date : 11 January 2019

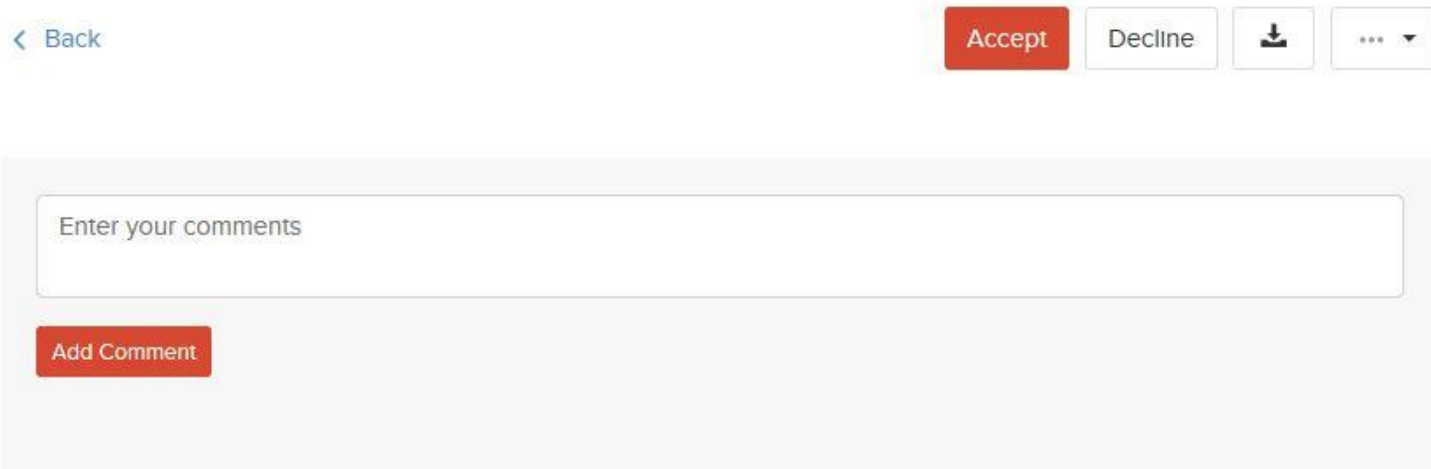
#	Item & Description	Qty	Rate	Amount
1	SJW-Review Notice of Allowance, review patent term. Review filing documents. Supervise filing of issue documents.	0.50	400.00	200.00
2	Admin-Prepare file issue document. Docket future actions.	1.00	100.00	100.00
3	USPTO- Notice of allowance fee	1.00	500.00	500.00
			Sub Total	800.00
			Total	\$800.00

Notes

ESTIMATE to take action to pay issue fee on a US Patent Application  
NON-EXTENDABLE DEADLINE  
Client Instructions and funds Requested:

# ESTIMATES

- At the top of the page you will see these buttons:



The screenshot displays a user interface for managing estimates. At the top left, there is a blue link labeled '< Back'. To the right of this are four buttons: a red button labeled 'Accept', a white button labeled 'Decline', a white button with a download icon, and a white button with a three-dot menu icon. Below these buttons is a large, light gray rectangular area containing a text input field with the placeholder text 'Enter your comments'. Below the input field is a red button labeled 'Add Comment'.


- To accept the estimate, click on the orange “Accept” button. The estimate will then be converted to an invoice.

# RETAINER INVOICES

- If this is the first project you're working on with us, we will create a retainer invoice that you will pay before we begin work. The retainer invoice will be sent to you in an email that looks like this:

Reply Reply All Forward  
Fri 1/11/2019 4:05 PM  
info <message-service@sender.zohobooks.com>  
Retainer Invoice from (RET-00136)

To Info

 RET-00136.pdf  
42 KB

Dear ,

Thanks for your business.

The retainer invoice RET-00136 is attached with this email. You can choose the easy way out and [pay online for this invoice](#). Here's an overview of the invoice for your reference.

Retainer Invoice Overview:  
Invoice # : RET-00136  
Date : 11 January 2019  
Amount : \$800.00

It was great working with you. Looking forward to working with you again.

Regards,

West & Associates, A PC



# RETAINER INVOICES

- When you open the portal, your unpaid retainer invoice will appear on the home screen like this:



OUTSTANDING RETAINER INVOICES	Available Retainer Payments
\$800.00	\$0.00

- Using the side menu, you can navigate to the Invoices page, and you can select the invoice you wish to pay.

RET-00136

11 January 2019

\$800.00

Outstanding

- Click on the invoice and you will be taken to the invoice page.

# EMAIL NOTICE


- Periodically, we send out invoices for work we have completed that has not been covered by a retainer invoice. You will receive an email from Zoho Books that looks like this:

Reply Reply All Forward  
Fri 1/11/2019 3:55 PM

info <message-service@sender.zohobooks.com>  
Invoice - INV-001502 from West & Associates, A PC

To Info  
If there are problems with how this message is displayed, click here to view it in a web browser.

INV-001502.pdf  
43 KB

**WEST & ASSOCIATES, A PC**  
  
**PATENTS TRADEMARKS COPYRIGHTS**

Invoice #INV-001502

Dear ,  
Thank you for your business. Your invoice can be viewed, printed and downloaded as PDF from the link below. You can also choose to pay it online.

INVOICE AMOUNT
<b>\$800.00</b>


Invoice No INV-001502  
Invoice Date 11 January 2019  
Due Date 21 January 2019

[VIEW INVOICE](#)

# OPENING THE INVOICE

- To view the invoice details, you can click on the attachment in the email or click on the big green button. Your invoice will look like this:

Due in 10 days

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West & Associates, A PC  
2815 Mitchell Drive, Suite 209  
Walnut Creek, CA 94598  
Tel: 925.262.2220  
www.westpatentlaw.com


**Invoice**  
# INV-001502  
Balance Due  
**\$800.00**

Bill To  
WESTA  
West & Associates, A PC  
2815 Mitchell Drive, Suite 209  
Walnut Creek, CA 94598

Invoice Date : 11 January 2019  
Terms : Net 10  
Due Date : 21 January 2019

#	Item & Description	Qty	Rate	Amount
1	SJW-Review Notice of Allowance, review patent term. Review filing documents. Supervise filing of issue documents.	0.50	400.00	200.00
2	Admin-Prepare file issue document. Docket future actions	1.00	100.00	100.00
3	USPTO- Notice of allowance fee	1.00	500.00	500.00
	Sub Total			800.00
	Total			\$800.00
	Balance Due			\$800.00

Notes  
ESTIMATE to take action to pay issue fee on a US Patent Application  
NON-EXTENDABLE DEADLINE:  
Client Instructions and funds Requested:

Payment Options 

# UNDERSTANDING YOUR INVOICE OR ESTIMATE

- All of our invoices and estimates provide detailed accounts of which project we worked on, what we did, how much time we spent on the project, fees that were incurred, and how much you will be charged for each individual item.
- You can find these details at the bottom of your invoice broken up into lines like this:

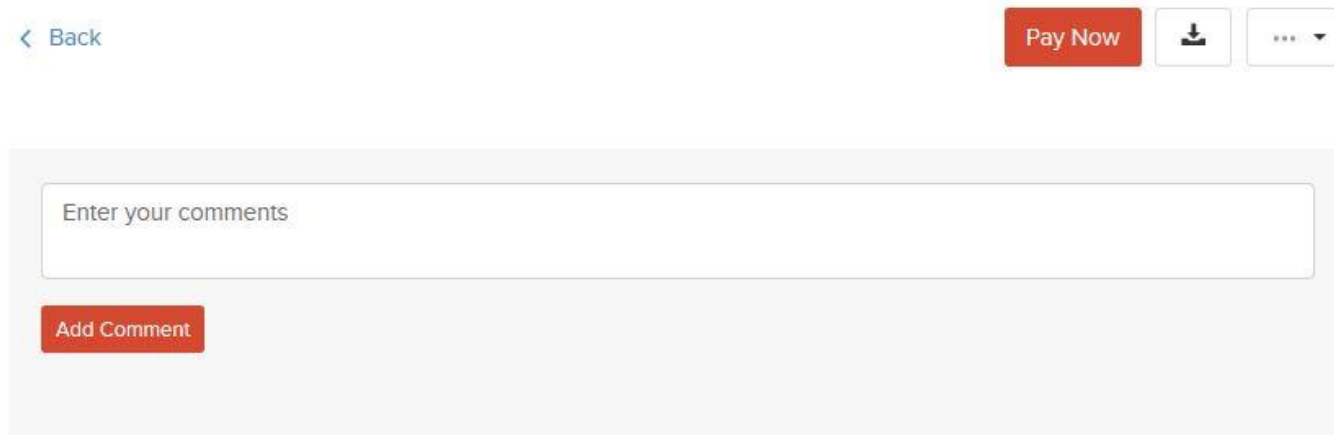
#	Item & Description	Qty	Rate	Amount
1	SJW-Review Notice of Allowance, review patent term. Review filing documents. Supervise filing of issue documents.	0.50	400.00	200.00
2	Admin-Prepare file issue document. Docket future actions	1.00	100.00	100.00
3	USPTO- Notice of allowance fee	1.00	500.00	500.00
			Sub Total	800.00
			Total	\$800.00
			Balance Due	\$800.00

# UNDERSTANDING YOUR INVOICE OR ESTIMATE

- We set up our bills by matter. This means that if you are working on multiple projects with us (i.e. a trademark application and a patent application, two patent applications, etc.), you will receive multiple invoices.
- Because the invoice's description states which project is being billed, it will be easier for you to budget for these projects yourself, and it will be easier to understand why you are getting charged for certain things.

# PAYING YOUR INVOICES

- You will need to pay your invoice within 10 days of receiving it.
- When you click on the green button in the email, you will be taken to the invoice page where you will see the invoice with these buttons above it:



The screenshot shows a user interface for an invoice page. At the top left, there is a blue link with a left-pointing arrow labeled "Back". At the top right, there are three buttons: an orange button labeled "Pay Now", a white button with a download icon, and a white button with a three-dot menu icon. Below these buttons is a large, light gray rectangular area containing a text input field with the placeholder text "Enter your comments" and an orange button labeled "Add Comment" positioned below the input field.

- Click on the orange “Pay Now” button to be taken to the payment page.


# PAYING ONLINE

- When you choose to pay an invoice online and click on the orange “Pay Now” button, you will be taken to a screen that looks like this:

Payment for INV-001502

Balance Due	INV-001502
<b>\$800.00</b>	Due Date: 21 January 2019

Select your payment method to proceed

 **Pay via Card** >  
Make fast and secure payments through your card.

# PAYING ONLINE

- To pay online with a credit card, select the “Pay via Card” button. You will then see this:

## CARD DETAILS

Your card details are sent to Square via secure SSL connection for payment processing. We do not store your card information in our servers.

Card Number	<input type="text" value="0000 0000 0000 0000"/>
CVV	<input type="text" value="CVV"/>
Expires on	<input type="text" value="MM/YY"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>

## BILLING ADDRESS

The billing address entered here must match the billing address of the card holder.

Address	<input type="text" value="2815 Mitchell Drive, Suite 209"/>
City	<input type="text" value="Walnut Creek"/>
Zip Code	<input type="text" value="Zip Code"/>
State	<input type="text" value="CA"/>
Country	<input type="text" value="United States"/>

I authorize West & Associates, A PC to charge this credit card automatically for future transactions

MAKE PAYMENT



# PAYING ONLINE

- Input your card details and billing address, and then you can decide if you would like us to save your card information to make future payments faster and easier, or if you'd prefer to keep your card private.
- Click the “Make Payment” button to finalize your payment.

# PAYING ONLINE

- When typing in your credit card information, be careful to avoid these common mistakes:
  - In the “State” box, type your state’s two letter abbreviation instead of the full name (“CA” instead of “California,” “NY” instead of “New York,” etc.
  - For most cards, the CVV is the three-digit code on the back of the card, but for American Express cards it will be the four digit code on the front.

# ONLINE PRIVACY AND SECURITY

- We are confident in the security of this website, but if you have any questions about your privacy and security you can access their privacy policy through our website.
  - Click on the line at the bottom of the page that says “Access our Privacy Policy here” and follow the link to Zoho’s page.

# OTHER WAYS TO PAY

- If you'd rather not pay online, there are other options to pay down your invoices.
  - You can give us a call at (925) 262-2220 to pay over the phone with a credit card.
  - You can email us at [payment@westpatentlaw.com](mailto:payment@westpatentlaw.com) to give us payment information through email.
  - If you would prefer to pay by cash or check, feel free to stop by our offices or mail your payment to 2815 Mitchell Dr. #209, Walnut Creek, CA, 94548.

# QUESTIONS

- If you have any questions regarding your bill or our payment policies, please give us a call at (925) 262-2220 or send an email to [payment@westpatentlaw.com](mailto:payment@westpatentlaw.com) and we will respond as quickly as possible. We are always happy to help, and we want to make sure that you are comfortable with your payment plan.

**WE ARE WATCHING**



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