



# PayScore User Guide

PayScore is a platform for Canadian businesses. This is a business to business service.

The intended PayScore user is a Canadian business in the energy or construction industry that is a service company, contractor, supplier, service provider.

PayScore allows the user to score the companies they work for/supply based on their payment reliability. These companies typically include energy producers, project owners, developers, general contractors.

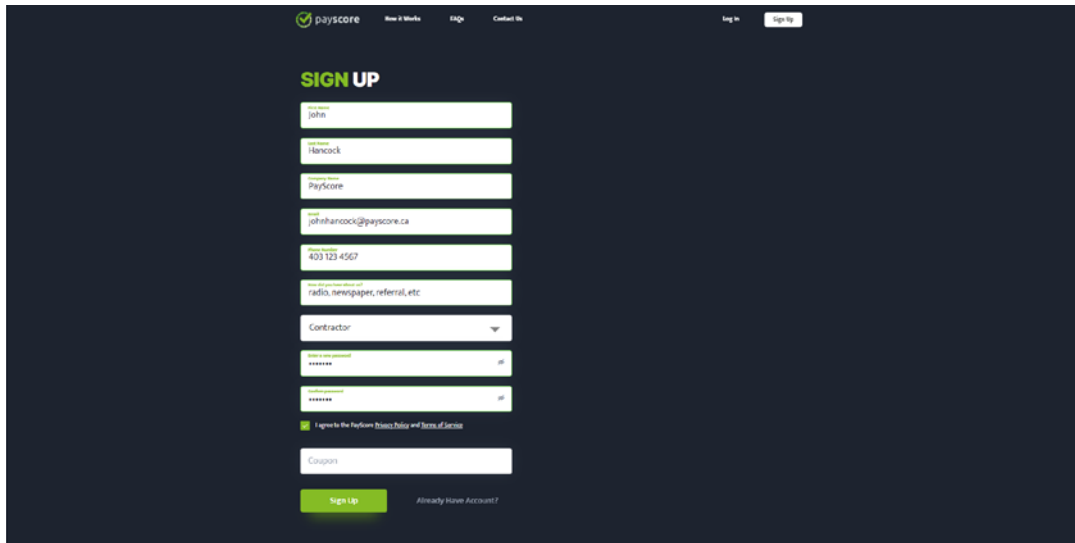
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## Sign Up

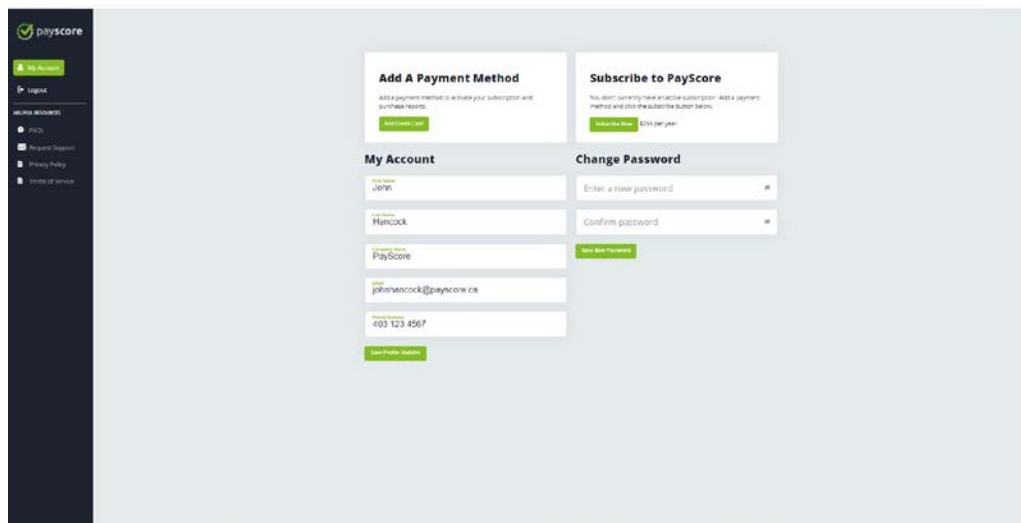
1. Proceed to [www.payscore.ca](http://www.payscore.ca) **Sign Up** page. Complete the registration information.

\* *Company Name* – use trade name if you are a numbered company



Sign Up Page

2. Click the **Add Credit Card** button and enter credit card information. Click the **Subscribe Now** button.



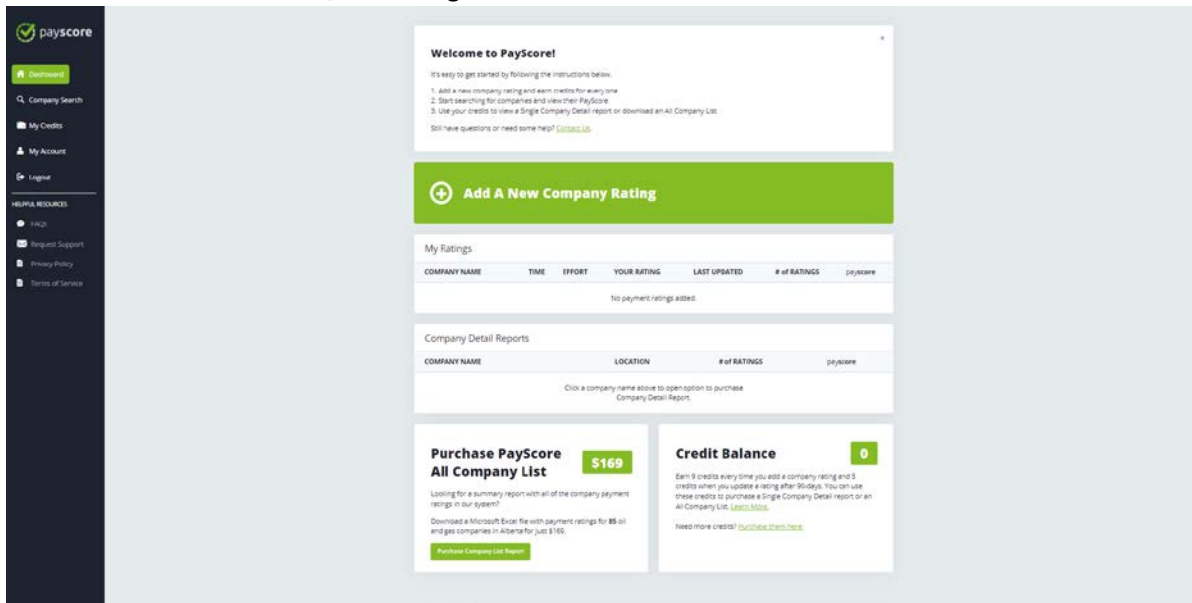
My Account Page

\*After subscription purchase, card info can be left in place to streamline purchasing reports or credits. There is the option to “Remove Credit Card” after subscription purchase to prevent inadvertent use by other users in your organization.

## Dashboard Setup

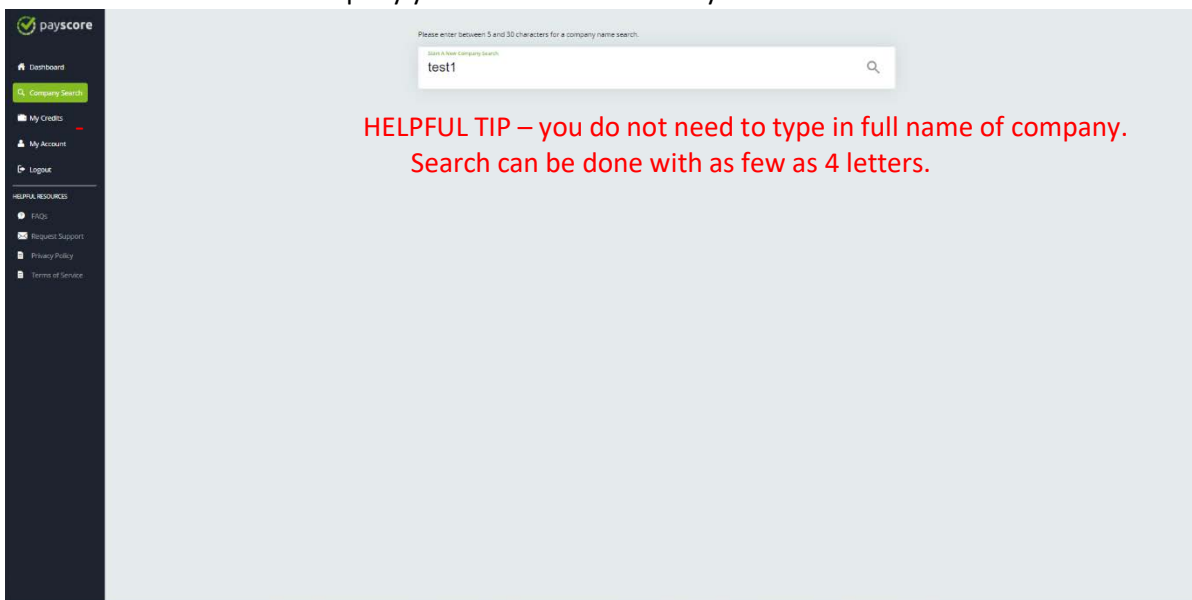
Proper setup of your dashboard is essential to gain maximum value from your PayScore subscription.

1. On the Dashboard screen, click the green box **ADD A NEW COMPANY RATING**.



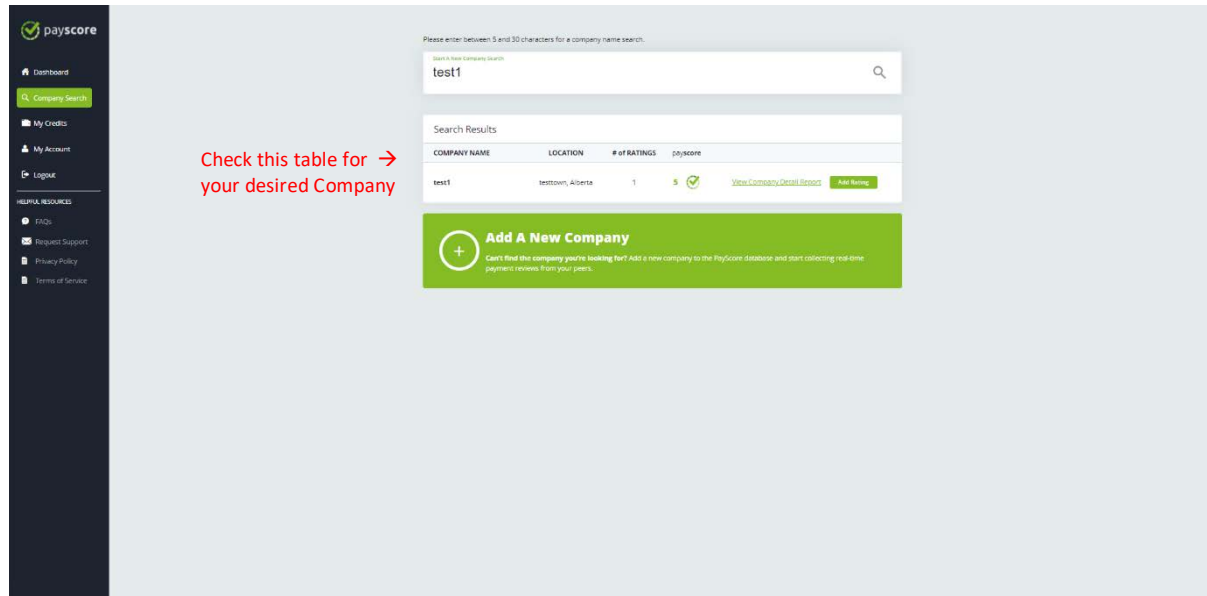
Dashboard Page

2. Enter the name of the company you would like to add to your Dashboard.



Company Search Page

3. Check the search results for the company you are searching for. Depending on the name/phrase you enter to search there could be several pages of results returned.



Company Search Page – with search results shown

**Yes** – the company you are searching for is in the list:

- click green **ADD RATING** to the right of the desired company
  - add time rating
  - add effort rating
  - click Submit Payment Rating
- Done. The company is now on your dashboard.

**No** – the company you are searching for is not in the list:

- click **Add A New Company** box at bottom of list
  - enter the company information
  - click Save & Add Rating
  - add time rating
  - add effort rating
  - click Submit Payment Rating
- Done. The company is now on your dashboard.

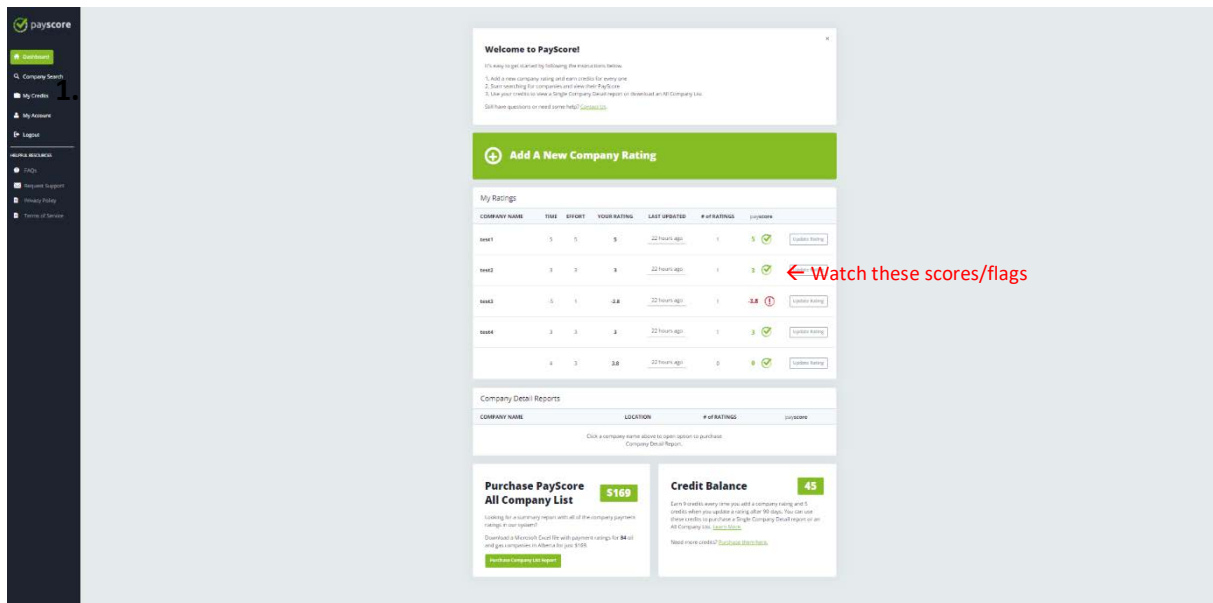
***\*\*Repeat as needed until all the companies you work for are populated into your dashboard.***

## Dashboard Tour

A customer is only good until they aren't. Customers that do not pay reliably can damage your business.

For each company you setup on your Dashboard, PayScore will provide the average score for that company based on all the user entered scores. The symbol next to the score provides a fast indicator if that company has been scored for missed payments.

A populated Dashboard will provide you a quick visual health check on the companies you work for.



The screenshot shows the PayScore dashboard interface. On the left is a navigation sidebar. The main content area includes a 'Welcome to PayScore!' message, an 'Add A New Company Rating' button, and a 'My Ratings' table. The table has the following data:

COMPANY NAME	TITLE	EVENT	YOUR RATING	LAST UPDATED	# OF RATINGS	PAYSCORE	STATUS	
COMP1		3	5	3	22 hours ago	1	5	Green Flag
COMP2		3	3	3	22 hours ago	1	3	Green Flag
COMP3		3	1	28	22 hours ago	1	2.8	Red Flag
COMP4		3	3	3	22 hours ago	1	3	Green Flag
		4	3	3.8	22 hours ago	0	3	Green Flag

Below the table is a 'Company Detail Reports' section and two summary cards: 'Purchase PayScore All Company List' for \$169 and 'Credit Balance' for 45.

**Last Updated** – time since you last updated score. To be refreshed after 90 days.

**# of Ratings** – number of ratings for that company over past 12 months from all users

**PayScore** – average score based on all users scoring that company.

**Flags** - Symbol to right of PayScore are Flags are used to indicate missed payments in system.

Green Less than 1% of ratings marked as missed payment

Yellow 1-5% of ratings marked as missed payment

Red Greater than 5% of ratings marked as missed payment

**Update Rating** – button will activate after 90 days allowing you to update score

**2. Company Detail Reports** – this is where Company Detail Reports will be found for 7 days from time of purchase. (more detail on reports below)

## Reports and Credits

### **Company Detail Report**

This is an optional report that can be accessed by clicking the link the search results or clicking the company name on the dashboard. This report will show all the ratings on that company for the previous 12 months. This will allow you to trend the payment behaviour of that company.

The Company Detail Report link can be found on your dashboard for 7 days after purchase.

Please see the number of ratings for that company before opting for the report to judge if enough reviews have been entered to make the report worthwhile.

### **All Company List Report**

This optional report can be accessed in the lower left area of the Dashboard. This will provide an excel export of all the companies in our system with their scores. Similar information as the single company searches but instead of a single company, it is all the companies in our system.

The download file can be found for 7 days after purchase on your dashboard.

Please see the number of companies listed in the system prior to purchasing the report.

### **Credits and how they work**

Users gain credits every time they add a company to their dashboard (9) and every time they update the score for that company (5). These credits are used to purchase the reports as needed. If you purchase more reports than you have credits there is the option to buy more credits at \$1 per credit.

This is the mechanism we use to incentivize users to keep dashboards maintained and populated. If reports were free, then users could simply pull reports and never contribute to the scores. Our system relies on all vendors contributing their experience.

### **For additional support:**

- check out our **FAQs** tab on the left menu of your dashboard
- use the **Request Support** link in the menu or email questions to [info@payscore.ca](mailto:info@payscore.ca)
- call us at 403-396-2950