Customer Portal Guide

Access the Site:

Go to our website, www.blueridgefarmerscoop.com.

- Click on the Customer Portal tab in the menu

Create a Portal Account:

Click on the Create Account button

- Enter your account number, the store number, and an invoice number
- You can find your account number at the top of any invoice above your name
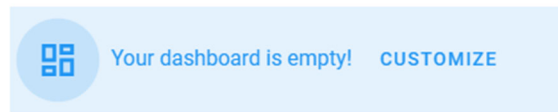- The store number and invoice number can be found at the bottom of any invoice you have
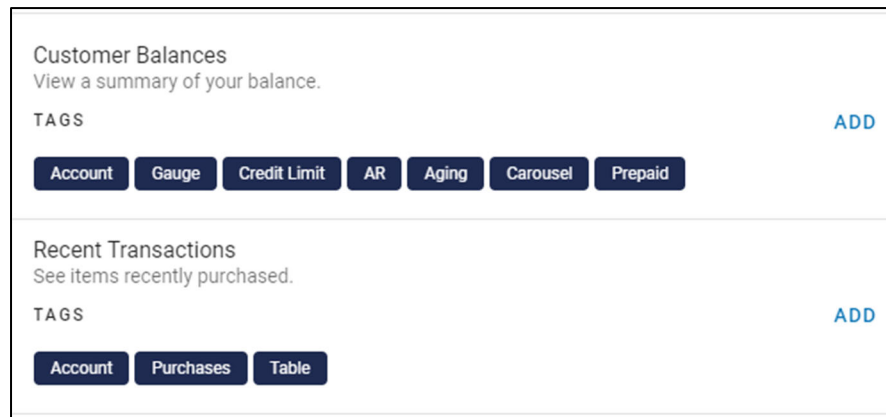

- Create a user name (we suggest first name.last name)
- Display name (we suggest your Full Name: First Last)
- Email address

Create a Dashboard:

Click CUSTOMIZE

- Select Add
- Select ADD for Customer Balances (best for customers with store credit)
- Select ADD for Recent Transactions (for all customers)

You have completed Creating your Portal Account!

Settings:

Click on your initials in the upper right hand corner

- Switch Account
  - If you have more than one account, switch between the accounts here
- Add Account
  - If you have another account with Blue Ridge Farmers Cooperative, you may add it to your instance of the Customer Portal
- Change Password

Portal Views:

Account

Summary

- Review your account balance information, if appliable, and recent transactions

Address Book

- Add, edit, or remove an address

Buyers

- Add, edit, or delete an authorized purchaser from your account

Profile

- Edit your contact information, invoice and statement preferences

Note: If you elect to receive invoices and/or statements via email, it is your responsibility to update email addresses when necessary, either through the customer portal or contacting the store directly. Your account balance is due whether an invoice or statement has been received. For credit customers, please refer to your application for terms and conditions regarding repayment.

Purchases

Credit Activity

- Review credit account activity, if applicable

Purchases

- Review all account activity, in summary, regardless of payment method

Transactions

- Review all account activity, in detail, regardless of payment method

Statements

- Download to review current and past statements, if applicable

Purchase Summary

- Filter to download/print Annual Purchase Summary information
- For a detailed Annual Purchase Summary, please contact either store directly

Payments

Before you can begin making payments via the customer portal, you will need to set up a payment source and the details will need to be verified.

Available Payment Source: ACH/EFT direct from your bank account

- Go to Payments/Payment Source
- Select ADD or EDIT or SETUP
- Complete the required fields and SAVE
- It is okay to abbreviate your city to fit into the space allowed
- It can take 5 – 7 days for your banking details to be validated which must complete before you can make a payment

Terms and Conditions:

- Use of the customer portal for payments bind the user to the following Terms and Conditions. If you do not agree, do not use the Make a Payment service:

  I(we) hereby authorize Blue Ridge Farmers Co-op to initiate entries to my (our) checking/savings account(s) at the financial institution listed and, if necessary, initiate adjustments for any transactions credited/debited in error. This authority will remain in effect until Blue Ridge Farmers Co-op is notified by me(us) in writing to cancel it in such time as to afford Blue Ridge Farmers Co-op and the financial institution a reasonable opportunity to act on it.

Once you have setup your bank information as a payment source, the details have been verified, and you agree to the Terms and Conditions, you may Make a Payment using the Customer Portal

Important note regarding scheduling payments:
- **Weekends**: if you schedule a payment on a weekend day, it will be processed the next available business day.
- **Month End**: if you schedule a payment on the last business day of the month, we cannot guarantee your account will be credited before month end. We suggest scheduling the payment on the 2nd to last business day of the month to avoid finance charges. If the last day of the month falls on a weekend, please see the above bullet point and plan accordingly.

Make a Payment

- Select Single Lump Sum or Pay by Invoice
  - To pay the Statement Balance select Single Lump Sum
- Specify the amount to pay
- Select a date for the payment
- Review your payment selections
- Read and select Agree
- Select Confirm

Payment History

- Review past payments

<u>Pending Payments</u>

- Review pending payments

<u>Payment Sources</u>

- Shows bank account added for payments

Licenses

Review Tax Exempt status and other licenses

- To edit or update, please stop by the 810 Harris Street store

Contact Us

If you need help setting up your account in the customer portal, have questions, or would like to provide feedback, please:
- Call CJ, Bookkeeper at 434-296-6191
- Stop by 810 Harris Street, Charlottesville
- Email: invoices@blueridgefarmerscoop.com

Frequently Asked Questions:

- **Forgot Username?**
    - Retrieve your Username by clicking the Forgot Username button
    - Enter your Email Address and click the Retrieve Username button

- **Forgot Password?**
    - If you've forgotten the password to log on to the Portal, click the Forgot Password button
    - Enter your Username or Email Address and click the Retrieve Password button

- **Pay by Credit Card?**
    - Credit Card payments are not available through the online portal

    To make a payment to your store credit account using a credit card, please call the store directly. Note there is a 3% convenience fee charged when paying your store credit account with a credit card. To avoid the 3% convenience fee, sign up to make payments from your bank account via the customer portal or add a credit card to your customer record for use per purchase. To add a credit card to your customer record, please stop by one of our two locations.

- **Is there an APP for that?**
  - Yes, there is an app for the portal!
    - To install as an app on an Apple or Android device
    - Go to the website on a phone or ipad using your preferred browser
    - Select the Android or Apple link
    - Follow the instructions to add an instance to your home screen