FinAssist Financial Services — Updating Your Billing Information

Customer Guide (Version 1.0)

Keeping your billing information current ensures uninterrupted service, accurate invoicing, and continued access to premium FinAssist features.

This guide explains how to update payment methods, billing addresses, and invoice recipients for individual and business accounts.

It also covers common scenarios—such as expiring cards, company mergers, and cost■center changes—plus security, compliance, and troubleshooting tips.

All updates can be completed through the FinAssist web app or mobile app in a matter of minutes.

1) Where to Update Billing Information

You can manage billing from the FinAssist dashboard.

• Web: Sign in at app.finassist.example → click your profile avatar → "Billing & Plans" → "Payment Methods."

• Mobile: Open the app → Settings → "Billing."

From here, you can add a new card, connect bank debit (ACH), or update your billing address and invoice recipients.

2) Adding or Replacing a Payment Method

• Add a new card: Select "Add Payment Method," enter the cardholder name, card number, expiration date, and CVC. You can optionally enable "Make Default."

• Replace an expired card: Choose the expired card → "Replace" → enter the new card. FinAssist will automatically route future charges to your new default method.

• Bank debit (ACH): Click "Connect Bank," then use the secure flow to authenticate with your bank. Some banks may require micro■deposits for verification; this can take 1–2 business days.

• Multiple methods: You can store more than one payment method. Use "Set as Default" to choose the primary payment source for renewals and overage charges.

3) Updating Billing Address, Tax Details, and Invoice Recipients

• Billing address: Under "Billing Details," edit street, city, state, postal code, and country. The new address appears on all future invoices.

• Tax information: Add or update your tax ID (e.g., EIN/VAT/GST) and select your tax treatment. FinAssist applies taxes based on your jurisdiction and the services purchased.

• Invoice recipients (AP contacts): Add one or more email addresses to receive invoices, receipts, and dunning notices. You can also CC a shared mailbox (e.g., ap@yourcompany.com).

4) Common Scenarios & Best Practices

• Card expiring soon: Turn on "Expiring Card Alerts" to receive reminders 30 and 7 days before the expiration date.

• New company name or merger: Update the Legal Entity Name and tax ID in "Billing Details," and upload supporting documentation if requested.

• Changing cost centers: Use "Invoice Notes & PO" to attach a purchase order, cost center, or project code. These notes appear on every invoice and in CSV exports.

• Shared responsibility: For teams, assign the "Billing Admin" role to finance stakeholders so they can update methods, download invoices, and manage limits without accessing sensitive app data.

5) Security, Privacy, and Compliance

FinAssist protects your billing data with end■to■end encryption and strict access controls.

• Payment security: Our payment infrastructure is PCI DSS compliant. Card data is tokenized and never stored on FinAssist servers.

• Access controls: Only users with the Billing Admin or Owner role can change payment methods or tax details. All changes are logged in the audit trail.

• Privacy: We adhere to SOC 2 controls and honor regional privacy laws (e.g., GDPR/CCPA). To request data access or deletion, visit Settings → Privacy Center.

6) Troubleshooting & Dunning

• Charge declined: Confirm the card number, CVC, zip/postal code, and sufficient funds. If the bank blocked the charge, ask them to approve "FinAssist Payments."

• ACH pending: Micro■deposit verification can take up to 2 business days. You'll receive a banner reminder to confirm deposit amounts and activate ACH.

• Past■due balance: When a renewal fails, FinAssist retries automatically and emails invoice recipients. You can pay a past■due invoice immediately from the Billing page.

• Service interruption: If the account becomes delinquent, some premium features may pause until payment is resolved. Your data remains secure and is not deleted.

7) Exporting Invoices and Finance Integrations

• Exports: Download PDF invoices and monthly CSV statements from "Invoices & Statements."

• Accounting systems: Enable QuickBooks® or Xero® sync under "Integrations." FinAssist will map line items, taxes, and PO numbers to your chart of accounts.

• Receipts: After every successful charge, a receipt is emailed to invoice recipients and available in your billing history.

8) Contacting Support

If you need assistance, our billing specialists are available 24/7.

• Email: billing@finassist.example

• Phone: 1■800■555■0420

• Live chat: Available in the web and mobile apps.

Provide your invoice number, organization name, and a brief description of the issue for the fastest resolution.

Final Notes

Keeping billing information accurate helps avoid service interruptions and simplifies compliance reporting at month■ and year■end.

We recommend reviewing your payment methods and recipients quarterly, especially before contract renewals or team reorganizations.

Thank you for choosing FinAssist Financial Services—your trusted partner for modern financial insights and secure, hassle■free billing.