

## How do I navigate through the TermSync Customer Portal?

You are given access to your customer portal through email notifications sent by your vendor, powered by TermSync. The payment reminder notification is the most common way companies are accessing their customer portal, but you can log into your portal from a direct message sent to you from your vendor, powered by TermSync.

Below is an example of how you can access your customer portal from the payment reminder notification. Additionally, this document covers the most common actions you can take advantage in TermSync, such as but not limited to the following:

- Request or Download Invoice PDF
- Schedule an online payment
- Reschedule payment dates
- Make a lump-sum payment
- Sign up for AutoPay
- Send your vendor a message
- Download your past account statements (PDF or CSV file)

### Login from Payment Reminder

When you receive a payment reminder email, you can click on **View Your Full Account Statement** (red button in the picture below) to log into your online account statement.



ABC Business Inc.

Thank you for doing business with Amazing Widgets. The tables below summarize your open account with us. Please use the links provided if you'd like to perform an action such as schedule a payment, apply credits, or ask questions.

**Payer Rating**      Excellent      ★★★★★      within 5 days of due date

As Of	Past Due	Due Within 7 Days	Other Current	Invoices Total	Credits Total	Account Balance	
Oct 02 2017	\$1,440.00	\$1,441.00	\$1,329.00	\$4,210.00	(\$156.00)	<b>\$4,054.00</b>	<a href="#">View Your Full Account Statement</a>

**Past Due Invoices**    3 invoices

Invoice Number	Invoice Date	Amount	Original Due Date	Scheduled Pay Date	
12-3489	Aug 24 2017	\$333.00	Sep 23 2017	<span style="color: red;">!</span>	<a href="#">Schedule Payment</a> <a href="#">View Details</a>
92-5310	Aug 28 2017	\$518.00	Sep 27 2017	<span style="color: red;">!</span>	<a href="#">Schedule Payment</a> <a href="#">View Details</a>
9-4911	Aug 31 2017	\$589.00	Sep 30 2017	<span style="color: red;">!</span>	<a href="#">Schedule Payment</a> <a href="#">View Details</a>
		<b>\$1,440.00</b>			

Amazing Widgets, Inc.  
 email: [billing@amazingwidgets.com](mailto:billing@amazingwidgets.com)  
 phone number: 1-800-123-4567

Powered by TermSync

If you click on **View Your Full Account Statement**, you are redirected to a login page. To proceed, enter the email address you received the notification at and click **Login**.

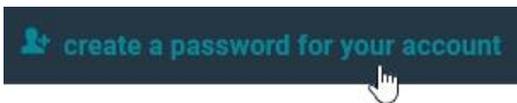
Enter your email address to proceed:

**Login** · [cancel](#)

By entering the Site, you certify that you are the owner of the email address named above. If you are not the owner of that email address, contact your vendor to add your email address as a contact in TermSync.

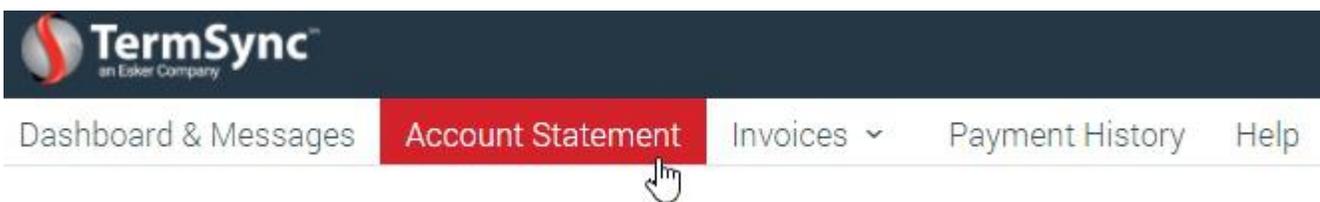
**If you think the email was sent to the wrong email address, please contact your vendor. You will always need to enter the email address that the notification was sent to in order to login successfully.**

If you want to add a password to your login, you can do this from your customer portal. Click on **create a password for your account**, next to your email address in the top-right of your account.



## **Account Statement**

After you've clicked **Login**, you land in your online **Account Statement**.



You have four other sections available in your customer portal: your **Dashboard**, your **Invoices** listing, your **Payment History**, and a **Help** section. You are welcome to review these sections by simply clicking on each tab; however, the majority of your time will be spent in the **Account Statement**.

The **Summary** section of your **Account Statement** provides you free services such as scheduling online payment, signing up for AutoPay, sending a message directly to your vendor, and downloading your past account statements (PDF or CSV file).

**Summary**



Invoices	\$21,559.00
Credits	\$0.00
<b>Total</b>	<b>\$21,559.00</b>

Available Actions

[Schedule Payment](#)

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[Make Lump-Sum Payment](#)

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[Sign-up for AutoPay](#)

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[Send Us a Message](#)

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[Reschedule Pay Dates](#)

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Download Past Account Statement

Choose Date ▼

Get PDF

Get CSV

## Request or Download Invoice PDF

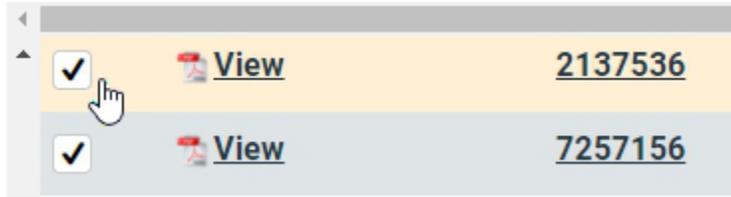
Before you jump into your **Available Actions**, please review the current open/available transactions. Here is where you can easily download the invoice PDF or request the PDF-copy if it's not currently uploaded into your account.

	PDF	Invoice #
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">7083238</a>
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">6181740</a>
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">2560551</a>
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">3686476</a>
<input type="checkbox"/>	<a href="#">Request</a>	<a href="#">7302337</a>

## Schedule a Payment

Once you have your invoice PDFs, you can navigate through your **Available Actions**, starting with scheduling an online payment.

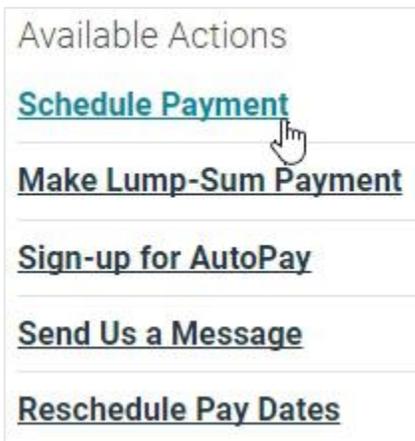
First, check the invoices you'd like to schedule for payment. Here is where you can also check any available credits to apply.



A screenshot of a web interface showing a list of invoices. The first row is highlighted in yellow and contains a checked checkbox, a 'View' button with a magnifying glass icon, and the number '2137536'. The second row contains a checked checkbox, a 'View' button with a magnifying glass icon, and the number '7257156'. A mouse cursor is pointing at the first 'View' button.

<input checked="" type="checkbox"/>	<a href="#">View</a>	<u>2137536</u>
<input checked="" type="checkbox"/>	<a href="#">View</a>	<u>7257156</u>

You will see a **Selected Total** showing the running invoice amount – credit amount in your **Summary** section. Once you are ready to pay the remaining balance on the selected transactions, click **Schedule Payment**.



A screenshot of a dropdown menu titled 'Available Actions'. The menu items are: 'Schedule Payment' (highlighted in blue with a mouse cursor), 'Make Lump-Sum Payment', 'Sign-up for AutoPay', 'Send Us a Message', and 'Reschedule Pay Dates'.

- Available Actions
- [Schedule Payment](#)
- [Make Lump-Sum Payment](#)
- [Sign-up for AutoPay](#)
- [Send Us a Message](#)
- [Reschedule Pay Dates](#)

This section is separated into the **Payment Method** and the **Payment Summary**. You must enter your payment information first, then move to the date of payment.

You are provided a picture of the **Payment Method** section and the **Payment Summary** section on the next two pages of this document.

- Please note you are able to save your preferred payment method for future payments in the **Payment Method** section.
- Also, you can enter a partial payment in the **Payment Summary** section. If you do include a short-pay, you must enter the reason for the shorted payment. You can attach a supplementary document to your reason if appropriate.

### Payment Method

Make Payment(s) to



Account Type

Business Checking ▼

Name of U.S. Financial Institution

Bank of USA

Name on Account

Allen Ackerman

Routing Number (9 digits)

123456789

Account Number

11111

Confirm Account Number

11111

I hereby authorize TermSync Inc, to process debit ACH transactions for the selected invoices from Amazing Widgets.

I also understand I can always delay or dispute a transaction through TermSync's platform. If I have a corporate debit block on my account, I will add Amazing Widgets to my filtered list (forward ACH Processor 9000274993 to your bank). The routing/account number I have provided is accurate, and I understand that any discrepancy/error with this information may incur a charge to my account. Lastly, I certify that I am an authorized representative of Email-n-Bulk, Inc..

Signature

Allen Ackerman

Today's Date

Oct 02 2017

You can save your payment method for next time by checking this box.

Save this payment method for future payments.

**Payment Summary**

**Payment Timing**  
 Choose the date on which you would like the payment(s) to be electronically paid.

Earliest possible: (10/03/2017)  
 On the due date of the invoice (or as soon as possible if due date has passed)  
 On the following date:  MM/DD/YYYY

Invoice Number	Due Date	Schedule For	Invoice Amount	Net Amount
2137536	Oct 18 2017	Oct 13 2017	\$119.00	\$115.00
	Reason For Partial Payment	<input type="text" value="Tax Deduction"/>		<input type="button" value="Attach File"/>
7257156	Oct 18 2017	Oct 13 2017	\$475.00	\$475.00
<b>Total:</b>			<b>\$594.00</b>	<b>\$590.00</b>
			<b>Total Amount to Schedule</b>	<b>\$590.00</b>

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You can adjust the payment amount and enter your reason for partial payment here.

You will receive confirmation that your payment has scheduled upon clicking **Schedule Payment**.

## Reschedule Pay Dates

If you schedule payment and need to adjust the future pay date, you can click on **Reschedule Pay Dates** instead of canceling the payment.

Available Actions

[Schedule Payment](#)

[Make Lump-Sum Payment](#)

[Sign-up for AutoPay](#)

[Send Us a Message](#)

[Reschedule Pay Dates](#)

You are redirected to a listing of scheduled transactions. Select the new pay date and click **Schedule Selected Invoices**. You can pick a new pay date per transaction if necessary.

## Make Lump-Sum Payment

If you want to apply a lump-sum payment to your account balance, select **Make Lump-Sum Payment**.

Available Actions
<a href="#">Schedule Payment</a>
<a href="#">Make Lump-Sum Payment</a>
<a href="#">Sign-up for AutoPay</a>
<a href="#">Send Us a Message</a>
<a href="#">Reschedule Pay Dates</a>

A pop-up will appear asking for the amount you want to pay. Enter the dollar amount and click **Preview**. Please note the payment will apply to the oldest invoice first, calculated by looking at the invoice due date.

**Enter Amount to Pay towards Account Balance**

1,000.00

**Preview** [cancel](#)

You are redirected to the payment section where you will enter your payment method and timing, just like when you schedule an online payment.

## Sign up for AutoPay

If you are interested in signing up for automatic payment on the listed due dates of your invoices in TermSync, click on **Sign-up for AutoPay**.

Available Actions
<a href="#">Schedule Payment</a>
<a href="#">Make Lump-Sum Payment</a>
<a href="#">Sign-up for AutoPay</a>
<a href="#">Send Us a Message</a>
<a href="#">Reschedule Pay Dates</a>

From here, enter your payment method information, mirroring the process to schedule an online payment. An overview of **AutoPay** in TermSync is provided.

#### An AutoPay Solution That Protects You

### How It Works

1. You receive invoices from Amazing Widgets. A payment is scheduled to be processed from your bank account on the date specified.
2. As the payment date approaches, you will receive a reminder email of the upcoming transaction.
  - a. If you want the payment to be processed, no further action is required.
  - b. If you need to delay or dispute the transaction, simply click through the reminder email to document a reason for the delay or dispute.
3. After the payment is processed, a receipt is emailed to you.

For additional information, you can contact Amazing Widgets.

You can edit your payment method or cancel **AutoPay** at any time. When you log into your customer portal, you will now see the option to **Edit AutoPay Settings**. Click on this to initiate an update or cancellation to your settings.

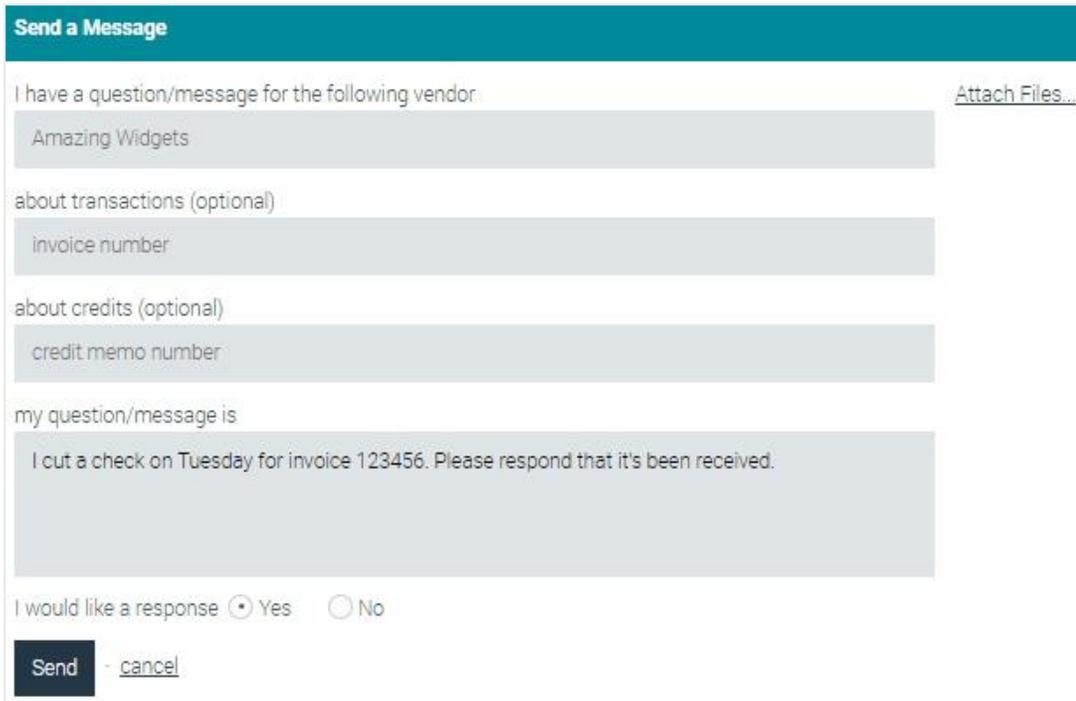
Available Actions
<a href="#"><u>Schedule Payment</u></a>
<a href="#"><u>Make Lump-Sum Payment</u></a>
<a href="#"><u>Edit AutoPay Settings</u></a>
<a href="#"><u>Send Us a Message</u></a>
<a href="#"><u>Reschedule Pay Dates</u></a>

### Send your Vendor a Message

You can also use your customer portal to send your vendor a message by clicking on **Send Us a Message**.

Available Actions
<a href="#"><u>Sign-up for AutoPay</u></a>
<a href="#"><u>Send Us a Message</u></a>
<a href="#"><u>Reschedule Pay Dates</u></a>

A message popup will appear. Enter your message like in the example below. You can check if you'd like a response from the vendor and attach a file, just like an email attachment.



**Send a Message**

I have a question/message for the following vendor: [Attach Files...](#)

Amazing Widgets

about transactions (optional)

invoice number

about credits (optional)

credit memo number

my question/message is

I cut a check on Tuesday for invoice 123456. Please respond that it's been received.

I would like a response  Yes  No

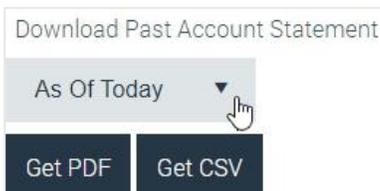
**Send** - [cancel](#)

By clicking **Send**, you will deliver an email to your vendor.

Please note you can also reply to an email you receive from your vendor powered by TermSync, and the response will be delivered back to the vendor.

## **Download Account Statement (PDF)**

Last but not least, you can download your past account statements from your account statement by selecting the past month or the current date under the **Choose Date** drop-down.



Download Past Account Statement

As Of Today ▼

**Get PDF** **Get CSV**

You can then export the statement into a PDF file or CSV file.

\*If you have additional questions on navigating your customer portal, review your **Help** section or contact your Vendor. If you have technical difficulties, please contact [support@esker.com](mailto:support@esker.com).