Pay on Terms User Guide

Managing Your Profile

You can change or update the information in your profile at any time.

1. Click the drop-down menu on your name in the top right corner and select Profile.
2. From the profile page, update or change your user profile details, then click Update.

Managing Your Notifications

Notifications help you know when an invoice has been published and alert you when payment is due.

1. Click the drop-down menu on your name in the top right corner, then select Notifications.
2. Browse the various notification events available to determine which notifications are important to you.
3. Once you click an event category, all related notifications will appear. In the top right corner, two columns will appear: Portal and Email.
    a. Portal refers to notifications received within your account under the Messages tab.
4. Email refers to notifications you'll receive directly to your inbox.
5. Notifications flagged with a black check mark are mandatory
6. Once you've decided on your preferred notifications, click Update Notifications.

Adding Users to Your Account

The VersaPay portal gives you the flexibility to add as many additional users to your account as you want.

1. Click the drop-down menu on your name in the top right corner, then select Users.
2. Click the Add User button.
3. After entering the new user's email and assigning a role, click Invite User.
    a. This will send that user an invitation email where they'll be able to create their VersaPay account

Adding a Bank Account

Adding a bank account is quick and easy. In fact, you can add as many bank accounts as needed for your business through the VersaPay portal.

1. Click the drop-down menu on your name in the top right corner, then select Payment Methods.
2. Once on the Payments page, click Add Bank Account.
3. Enter your bank account information into the fields provided. Once completed, agree to the terms and conditions and click the Add Bank Account button.
4. Once on the confirmation page, double-check your bank account details are correct, then click Confirm Bank Account.

Signing up for Autopay

You can use the autopay feature to automate your payments for your convenience.
There are two options for accessing Autopay agreement setup:

1. Main page: In the top right corner, click Sign up for Autopay
2. Payment Method page: In the top right corner, click the drop-down menu and select Payment Methods.

Both options take you to the Payment Methods page.

3. Once on the Payment Methods page, Autopay will be switched OFF. Click New to create an agreement.

4. In the fields provided, enter the bank account information you would like to use.
5. Click the checkbox to indicate if there is a type of invoice you want to pay, a maximum amount, and that you have authorized this funding source to be debited.
6. Click the I Agree button. You will be prompted to confirm the agreement. If the information is correct, click Confirm.
7. Once confirmed, a confirmation banner will appear to alert you that the Autopay agreement was successfully created. The Autopay feature will now be ON.

Viewing an Invoice

You will receive an email when a new invoice is available. Click the link in the email to access your account and view the invoice.

1. Select the invoice you wish to view by clicking on an invoice number.
2. When viewing the invoice you will see the status in the top left corner of the page.
3. To pay the invoice, click the Pay Now button located in the top right corner of the page.

Paying an Invoice(s)

To pay a single invoice, click on the invoice to view it. Click the Pay Now button located in the top right corner of the invoice.

To pay multiple invoices at one time, flag the check boxes beside the invoices you wish to pay. Click the Pay button.

You will be taken to the checkout page.

1. Select a payment method
2. Within the menu, choose your preferred bank account from which to make the payment, or add a new bank account.
    a. Short Payment
        i. If, for any reason, you choose to split a payment or make a partial payment, change the amount in the text box provided.
        ii. Note: Split or partial payments require a note within the text box providing reason for the short payment.
3. When you are ready to pay, click Continue in the bottom left corner. You will be directed to the payment confirmation page.
4. Click Complete Payment in the bottom right corner. You will be redirected to the main page where a confirmation banner will appear showing the amount and the payment reference assigned to the transaction.

Scheduling Payments

Scheduling payments is an easy way to pay invoices without having to login to your account.

1. Select the invoice(s) you wish to schedule for payment and click Pay. You will see a drop down menu beside the ready-to-pay title. You can choose to pay on the invoice due date or pay on a specified date.
2. Select the date you would like the payment processed, and click Continue.
3. A confirmation page will display the total charge along with the funding source used to fund the payment.
4. To proceed with the payment, click Schedule Payment in the bottom right corner.

Opening a Dispute on your Invoice

Opening a dispute allows you to communicate with uShip when a potential invoice issue arises.

1. When viewing an invoice, scroll down to the bottom of the page to Recent Activity. The comment field provided can be used to communicate with uShip.
2. In the field provided, enter a comment and details of a dispute on the invoice selected.
3. Once complete, flag to add your feedback and Open Dispute checkbox located in the bottom right corner, then click Comment.
4. uShip will be notified when your comment has been added.
5. All further activity will be documented below at the invoice level, including responses from uShip.
6. Upon a dispute, your invoice due date will be on hold until the dispute is settled. Once it has been settled, you will have 5 additional days to pay your invoice as a courtesy.

Viewing Prior Payments

1. Click on the Payments tab to see a list of all past payments made to uShip.
2. Status Filters: Select a filter to display selected past payments.
3. Export All: Download a list of all past payments as a CSV file. The report will pull the information returned by your filter.
4. Under the invoice number column, you will see the invoices marked ‘paid.’ If you have paid multiple invoices, hover over the number displayed to see which invoices were paid and the amount of each invoice.

Downloading and Printing Multiple Invoices

You can download and print invoices either individually or multiple invoices at once.

1. From the invoice listing, select the invoices you want to download by flagging the checkboxes next to each one, and click the PDF button. This will consolidate the invoices into a single PDF document.
2. A banner will appear at the top of the page once the invoices are ready to download.
3. Click on the download link in the banner, and the invoices will be downloaded to your computer for viewing.