



Synchrony Pay Monthly Guide

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Either a provider or an applicant can start the process of submitting a prequalification check for a Pay Monthly installment loan. This guide shows both the provider and the applicant views of the process when Pay Monthly is selected.

- The Pay Monthly application is available in English only.
- **NOTE: Restrictions by State for submitting applications on behalf of your patients/clients may apply. Refer to your Operating Guide located in the Learning Center.**

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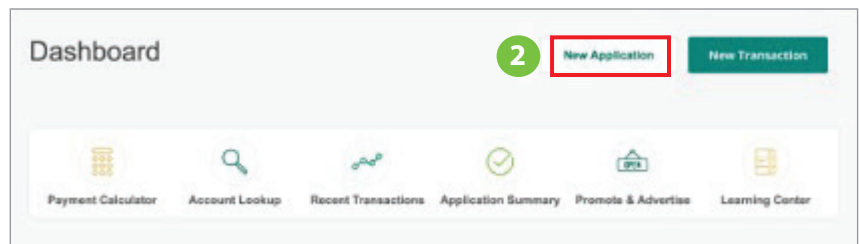
Synchrony Pay Monthly - Provider-Initiated Application View

IMPORTANT: Once the patient or client's application is approved and terms & conditions are accepted, the loan is initiated and unless the funding date is altered, the transaction is processed automatically and Synchrony will pay for the purchase within two to three business days. Providers should reference **Check Application Status** in Provider Center to ensure the loan was approved prior to beginning any treatment work.

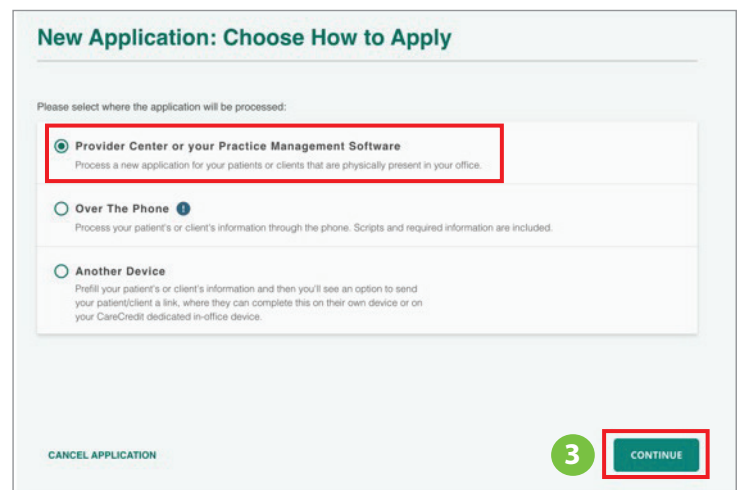
At the applicant's request, providers may begin by submitting a prequalification check for both the CareCredit credit card and the Pay Monthly installment loan.

Provider-Initiated Application Process

- 1 Log in to Provider Center at **www.carecreditprovidercenter.com**.
- 2 At patient/client's request, click **New Application**.



- 3 Select **Provider Center or your Practice Management Software** and click **Continue**.



FOR APPROVED PROVIDERS: [Click here](#) for the Provider-initiated, Applicant-completed application process.

Synchrony Pay Monthly - Provider-Initiated Application View

4 Complete the required fields and verify the customer's valid, government-issued ID before clicking **See if Applicant Prequalifies** at the bottom of the page. (See **Operating Guide** for acceptable forms of ID.)

5 Verify the application information is correct. Enter the current Application Revision Date. (The Application Revision Date can be found on the lower left corner of the paper Application cover page and under the Applicant signature box.)

Click **Submit**. Please note there is no impact to the applicant's credit bureau score to prequalify.

6 You will be informed if the patient/client is prequalified for the CareCredit credit card, Pay Monthly, or both (pictured).

In some cases, the Pay Monthly approval tile will indicate that the patient is required to make an initial payment.

You must present all pre-approved product offers to the consumer verbally, referencing the product details that appear on the provider facing decision page on screen.

Brochures containing terms and conditions of either/both products must be handed to the applicant to read.

To move forward with Pay Monthly, select **Continue** below the Pay Monthly Installment Loan.

NOTE: If the provider selects Continue for either option, they can still navigate back to this screen if they want to evaluate options.

7 In some cases, a final credit decision cannot be made on an applicant's Pay Monthly application – reasons for this can vary (incomplete applicant information, ID verification needed, incorrect address or applicant name). Have the applicant call 1-800-480-0186 to authenticate and clear the pending status. **IMPORTANT: Do NOT call Provider Services.**

Synchrony Pay Monthly - Provider-Initiated Application View

8 Confirm or adjust the Transaction Amount and click **Calculate**. If the patient is required to make an initial payment, that amount will automatically be calculated here. Pay Monthly offers are then presented below.

9 Together, choose a Service/Delivery date at the bottom of the page under Additional Details, this will be the funding date of the loan.

IMPORTANT: If the Service/Delivery date is not selected, the funding date will default to the day the applicant completes the application (within the 7 day window). A later date must be chosen during the application process in order to edit the date. Click here for guidance on how to edit the date after submitting the application.

10 Click **Proceed**.

11 When presented with additional application information, read the acknowledgements to the applicant and once they agree, click **Acknowledge**.

12 Enter the applicant's contact information (mobile or email) and click **Send** to send the application link to the applicant. A confirmation message will appear if sent successfully.

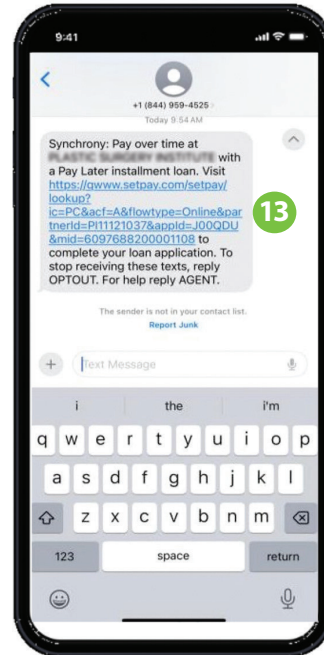
If the patient/client doesn't receive the SMS or email, click the link that says **If the applicant has not received the message, try again** to resend. In this case, the provider would start again from the screen on the left (select either SMS or email, enter patient's/client's contact info).

The screenshots illustrate the provider-initiated application process. The first screen, 'Installment Loan Details', shows a 'Calculate' button highlighted in red with a circled '8'. The second screen, 'Additional Details', shows a date field highlighted in red with a circled '9'. The third screen is a 'Please acknowledge the following' dialog box with an 'ACKNOWLEDGE' button highlighted in red and a circled '11'. The fourth screen is the 'Send Link to the Applicant' dialog box with a 'SEND' button highlighted in red and a circled '12'. The fifth screen shows a 'Success' message: 'The info has been sent to: Joe (999-998-8888). If the applicant has not received the text message after a few minutes, you can try again.'

Synchrony Pay Monthly - Provider-Initiated Application View

The applicant will now continue the application on their own device.

The following are the screens they will see when completing the application process. They will have 7 days to complete the application before needing to reapply.



13 They will receive a link via email or SMS and click to continue the application.

14 They will enter their last name, last 4 SSN and billing zip code and click **Continue**.

15 Available program options will be displayed. If the patient is required to make an initial payment, the amount of the initial payment will be displayed here. They will select a plan and click **View Loan Details** and/or **Select** to proceed.

NOTE: Some providers will only offer Standard Loans, while some will also offer Waived Interest Loans.

A screenshot of the 'Check Application Status' form. It contains three input fields: 'Last Name' (Schmoe), 'Last 4 SSN' (1234), and 'Zip Code' (28078). A blue 'CONTINUE' button is at the bottom. A green circle with the number 14 is overlaid on the button.A screenshot of the loan offer selection screen. It shows a 'Waived Interest Promotion' for \$468.00/month and a 'Standard Installment Loan' for \$250.78/month. A green circle with the number 15 is overlaid on the 'View Loan Details' button.

Synchrony Pay Monthly - Provider-Initiated Application View

- 16 If an initial payment is required, they can do so here by using a debit or credit card.
- 17 Setting up Autopay for automated reoccurring payments is the same process regardless of whether it's optional or required.
 - If Autopay is optional, they may use a debit, checking, or savings account.
 - If Autopay pay is required, they may use a debit, checking, savings account, or credit card.

To enroll, they'll simply provide their account details and click **Enroll In Autopay**.

- 18 They may elect to receive upcoming payment reminders and loan related updates by clicking, **Yes, Sign Me Up**.
- 19 After reviewing the loan details, they'll check the Disclosures/ Privacy Policy box before clicking **Accept Your Loan** which authorizes a hard credit inquiry.
- 20 An email will be sent notifying the applicant that the contract has been completed.

NOTE: Some applicants might be prompted to verify their identity again or will be declined for various reasons.

IMPORTANT: Once the patient or client's application is approved and terms & conditions are accepted, the loan is initiated and unless the funding date is altered, the transaction is processed automatically and Synchrony will pay for the purchase within two to three business days. Providers should reference **Check Application Status** in Provider Center to ensure the loan was approved prior to beginning any treatment work.

APPROVED = loan was successful
IN PROCESS = loan is still in process
DECLINED = loan was declined

Synchrony Pay Monthly:

Provider Services
855-872-6189

Customer Services
844-373-4960

9:41 | synchrony

\$176.50 / Month REDUCED APR*
 19.99% APR | 36 Months | \$6,354.10 Total
 Due monthly with \$250.00 due today.
 Choose a different offer

16 **Terrific!**
 Provide the details for your initial Payment* of \$250.00.

Select Payment Method
Debit Card

Debit Card | VISA | MASTERCARD | DISCOVER

Full Name

Card Number

Expiration | Security Code
 MM/YY | 3 digit code on card

Your payment will be processed after you review and agree to the Installment Loan contract. Your bank may charge you

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\$540.00 / Month WAIVED INTEREST*
 29.99% APR | 48 Months | \$25,920.13 Total
 *Waived interest if paid in full within 24 months.
 Choose a different offer

17 **Enroll in Autopay (Optional)**
 Automate your payments each month, so you never miss a due date.
 Turn it off anytime in your account.

Choose an Autopay Option

Select Payment Amount

Select Payment Method

Please click here and read the terms & conditions before submitting to learn about the Synchrony Bank Authorization Agreement. By clicking the button below, I acknowledge that I have read and agree to the terms and conditions for Autopay and authorize enrollment in recurring monthly payments.

ENROLL IN AUTOPAY

BACK

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Review Terms of the Loan

ANNUAL PERCENTAGE RATE	
The cost of your credit as a yearly rate	29.99%
FINANCE CHARGE	
The dollar amount the credit will cost you	\$10,920.13
Amount Financed	
The amount of credit provided to you on your behalf	\$15,000.00
Total Of Payments	
The amount you will have paid when you have made all payments as scheduled	\$25,920.13

Your Payment Information

\$540.00 per month
 for 48 months

Payments will be due monthly beginning [calculated date], (e)*
 *(e) means estimate

Review the terms of your loan:
 These contract terms provide additional information about nonpayments, default and our right to require repayment in full before the scheduled maturity date.

Prepayment:
 There is no penalty of fee for prepayment of this loan in whole or in part.

Late Charge:
 \$25.00 if your payment is late by more than 2 days from the payment due date, but no more than the scheduled payment amount.

Waived Interest Promotion:
 Paying the minimum monthly payment of \$540.00/month will not pay off the amount financed within the 24 month waived interest promotional period. To pay off the amount financed within the 24 month promotional period and have interest waived, consider paying a minimum of \$625.00/month.

*Disbursement is the date the merchant processes this sale. You will be notified later of the exact date of your first monthly payment due.

Synchrony Bank, the Creditor, will pay the Amount Financed of \$15,000.00 to XYZ Merchant.

I have read the **Truth in Lending Disclosure and Loan Agreement, the Credit Score Disclosure and Privacy Policy**. Selecting "Accept & Submit" constitutes my agreement to these loan terms with my electronic signature.

19 **ACCEPT YOUR LOAN**

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18 **Sign up for loan alerts and reminders via text (optional)**

Get text reminders about your upcoming payments and other loan related updates sent to the number you provided: **555-555-1234**.

YES, SIGN ME UP

NO THANKS

By submitting this form, you AGREE to the **Text and Email Account Alerts Terms and Conditions**. If you elect to receive alerts via text, but, prior to making such election, you had revoked consent for us to use automated technology to call or text mobile numbers you give to us, you also agree that, upon electing to receive text alerts, you consent to us using such automated technology to call or text such numbers under the terms of the communications consent set forth in the agreement governing your account "Credit Agreement Consent," including for the purpose of texting you the account alerts you select and for other account-related purposes. You agree that if you seek to terminate account alerts via text, such termination will apply only to account alert texts and will not terminate other texts for which we have your consent. Message and data rates may apply. As to account alerts sent via text, text STOP to terminate such alerts and HELP for help.

BACK

synchrony

20 **Congrats, your loan application was approved!**

Your purchase for **\$15,000.00** is complete. Please notify your provider that your loan was approved.

A confirmation email was sent to both you and your provider with your loan details.

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 Usage Agreement | Online Privacy Policy | Accessibility

Synchrony Pay Monthly - Consumer-Initiated Application View

IMPORTANT: Once the patient or client's application is approved and terms & conditions are accepted, the loan is initiated and unless the funding date is altered, the transaction is processed automatically and Synchrony will pay for the purchase within two to three business days. Providers should reference **Check Application Status** in Provider Center to ensure the loan was approved prior to beginning any treatment work.

The applicant may scan the practice's QR code or click their custom link to begin the prequalification check.

Consumer-Initiated Application Process

Patients/clients can start the application themselves by clicking the provider's custom link **1A** or scanning their QR code **1B**.

How to scan a QR code on Android and iOS

1. Open the camera app.
2. Point the camera to a QR code.
3. Tap the banner that appears to open the link associated with the QR code.

1A Synchrony: Pay over time at PLASTIC SURGERY BOUTIQUE with a Pay Later installment loan. Visit <https://www.synchrony.com/retail/lookus?sc=PC&act=AddFlowType=Online&loanId=PI1121037&accountId=J00GDU&mit=659726920001100> to complete your loan application. To stop receiving these texts, reply OPTOUT. For help reply AGENT.

1B Two great ways to pay for care. Scan the QR code to get started today.

2 Pay over time for health and wellness. Learn, Apply, Pay.

3 Let's get started. How much financing do you need? Less than \$9,500, \$9,500 or more.

4 See if you prequalify for financing. Date of birth, Last 4 SSN/TIN, Mobile number.

5 Make sure everything is correct. Full Name, Address, Date of Birth, Phone Number, SSN/TIN.

See the **QR Code and Custom Link job aid** for more information.

- 2 They'll drive the process from start to finish taking the following steps, starting by clicking **Check if you prequalify**.
- 3 **NOTE: Not all applicants will see this step to complete.** In some cases, applicants will be asked to specify the amount that they are looking to finance then click **Continue**.
- 4 They'll enter:
 - Date of Birth
 - SSN or TIN
 - Mobile number
 And click **Continue**.
- 5 The applicant will complete the blank fields or make changes before clicking **Continue**.

CONTINUED ▶

Synchrony Pay Monthly - Pended Applications

In some cases, a final credit decision cannot be made on a patient's Pay Monthly application. Reasons for this can vary, including incomplete applicant information or ID verification needed. In these cases, a notification will appear asking for the patient to call Synchrony to verify their identity and applicant details. The notification will include a phone number and application reference number. **In these instances, please have your patient call 1-800-480-0186 to authenticate and clear the pending status.**

The application status is currently pending

We are unable to provide a final decision on this application based on the information provided. We are usually able to resolve this with a brief phone call.

Please have the applicant call 800-480-0186 for further information.

The reference number for this application is XXXXX

1 If the applicant indicates their loan application status was resolved from the support phone number provided, please press the "Refresh" button below, and continue to send the link to the applicant to finalize their loan details.

1 While an application is in Pending Status, you can view the application details in the **Check Application Status report**. First click on **Edit Search**, then select **SYF Installment Loan**, choose the appropriate date range and click **Search**.

2 Once you find the application, click on the patient's NAME (**must click the name and not 'View Loan Details'**).

3 If the patient called the phone number and cleared their pending status, you can click **Resend Application** to send the prequalification back to the patient to finalize the loan.

If the patient did not call the phone number and clear their pending status, the 'Resend Application' button will not appear.

Check Application Status

Search By

Applications are viewable for the last 25 days

SEARCH METHOD

CareCredit (MPQ)

+ Last Name

+ Home Phone Number

- Application Date

APPLICATION DATE

Matching Applications

Application Date	Name	Status	Product	Actions
01/14/25	2 <input type="button" value="APPLICANT NAME"/>	APPLICATION PENDING	Pay Monthly	<input type="button" value="View Loan Details"/>

Application Detail

Application in Process
This application is pending the customer's completion on their own device.

APPLICANT NAME: FIRST NAME, LAST NAME MERCHANT NUMBER: *****0661

DATE: 01/14/2025 LOAN AMOUNT: \$ 12,000.00

3

Synchrony Pay Monthly - Refund Processing

You may initiate a refund from [Application Summary](#) report or [Check Application Status](#).

1 Select **Start Return**.

2 Choose **Full** or **Partial Refund**.
If Partial Refund is selected, enter the dollar amount to refund. Click **Continue**.

3 Click **Request Refund**.

4 Click **Done**.

NOTE: Once a refund is initiated, you should see the adjustment made on your [Daily Funding Report](#). Depending on the dollar amount, it could take a few business days to reflect the adjustment.

Loan Details

Summary

Account Holder Name	Last 4 of Acct #	Status	
ALPHEE REIDER	5356	Funded	
Merchant ID	Product Type		
XXXXXXXXXXXX	Synchrony Pay Monthly Loan		

Transaction Details

Transaction Amount	Amount Financed	Initial Payment	Merchant Discount Rate
\$10,500.00	\$10,500.00	\$0.00	8.90%
Post Date	Term Length	Intro Rate Period	Loan Rate APR
10/08/2025	48 Months	0	32.99
Blended APR	Intro Rate APR	Post Intro Term	Post Intro Rate
N/A	N/A	N/A	N/A

Actions

Issue A Refund

CLOSE

Process Refund

All fields are required unless otherwise noted.

TRANSACTION TYPE: Refund APPLICATION KEY: XXXXXXXXXXXXXXX

Installment Loan Details

APPLICANT NAME: MICHAEL REIDER UPDATED FINANCED AMOUNT: \$20,250.00

Return Details

FULL REFUND
Refund the full amount of \$20,250.00 and cancel the consumer financing agreement.

PARTIAL REFUND
Keep financing as payment and refund part of the amount financed. Enter the dollar amount to be refunded.
\$

CONTINUE CANCEL

Process Refund

APPLICATION KEY: XXXXXXXXXXXXXXX APPLICANT NAME: MICHAEL REIDER

Please confirm the amount to be refunded below:

AMOUNT FINANCED:	\$20,250.00
REFUND AMOUNT:	\$20,250.00
NEW AMOUNT FINANCED:	\$0.00

By clicking "Request Refund", you are authorizing us to reverse the financing transaction including debit of the amount listed above from the Merchant's bank account within two business days of today's date.

REQUEST REFUND BACK CANCEL

CareCredit PROVIDER CENTER Transactions Applications Reports Resources & Settings Support

Process Refund

APPLICATION KEY: XXXXXXX APPLICATION NAME: John Doe ADDRESS: 100 Main Street, New York, NY 10001

Please confirm the amount to be refunded below:

AMOUNT FINANCED:	\$3,500.00
REFUND AMOUNT:	\$3,500.00
NEW AMOUNT FINANCED:	\$0.00

By clicking "Request Refund", you are authorizing Allegro Credit to reverse the financing transaction including debit of the amount listed above from the Merchant's bank account within two business days of today's date.

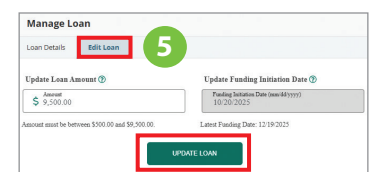
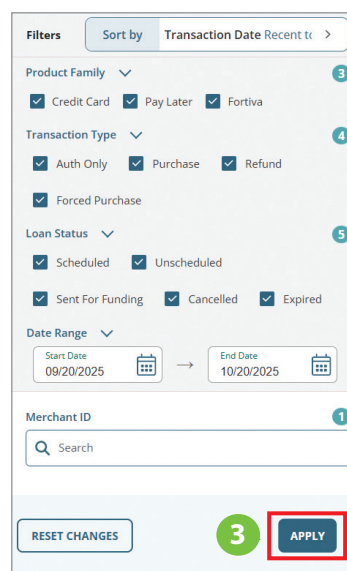
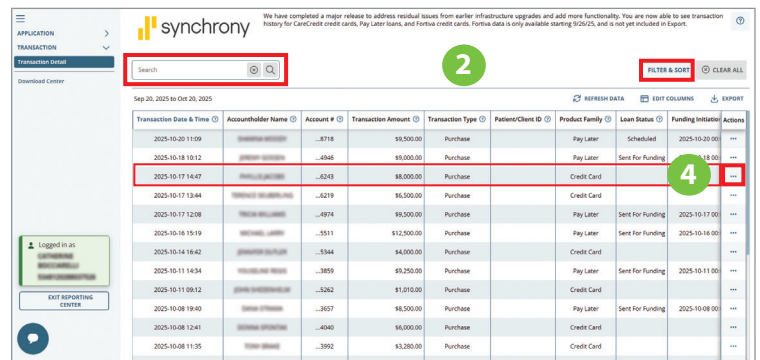
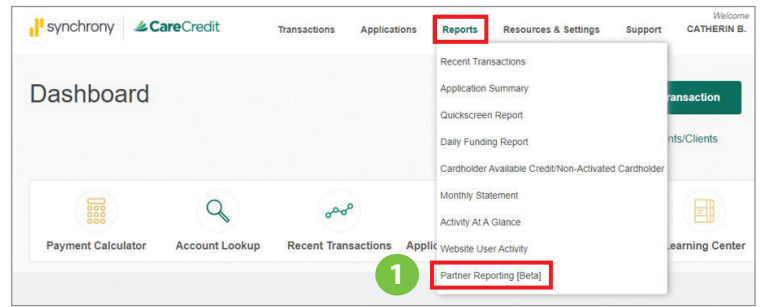
Done

Synchrony Pay Monthly - Scheduled Funding (Edit a Loan Funding Date)

Scheduled Funding allows a Provider to fund a Pay Monthly loan at a later date, aligning with the actual service date. Once the Pay Monthly loan has been approved, the Provider can manage the funding schedule in Provider Center via the Reporting Platform. **IMPORTANT: If no Service/Delivery date was specified at the time of the application, the funding date will automatically default to the date the applicant completes the application.**

- 1 From the home page dashboard under the **Reports** tab, choose **Partner Reporting (Beta)**.
- 2 You can use the search bar to locate the transaction you are looking for, or you may click **Filter and Sort**.
- 3 Refine your search and click **Apply**.
- 4 After identifying the loan whose funding date you wish to change, click the ellipsis in the Actions column of that transaction and click **Manage Loan**.
- 5 Select **Edit Loan** at the top. Enter a funding date that aligns with the actual service/delivery date and click **Update Loan**.

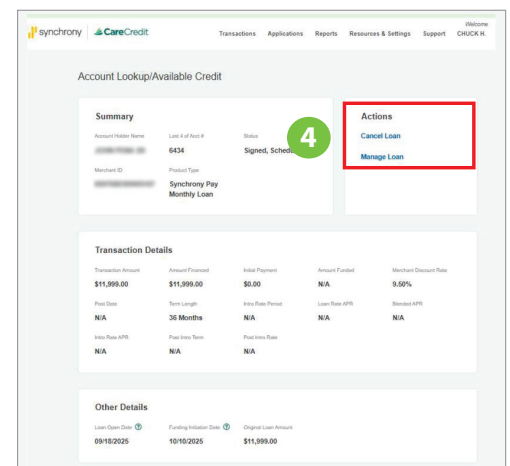
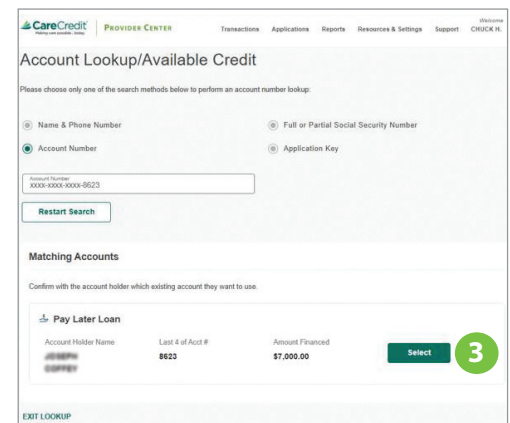
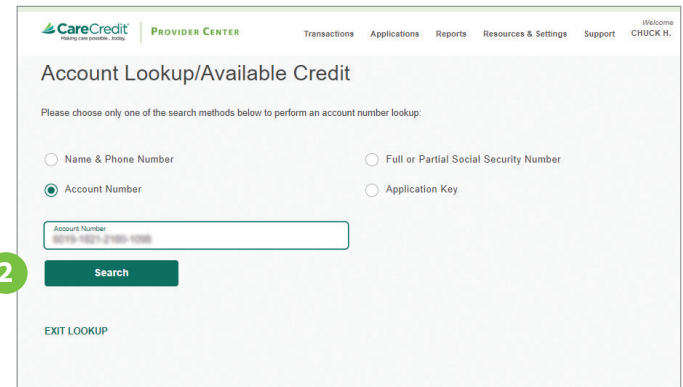
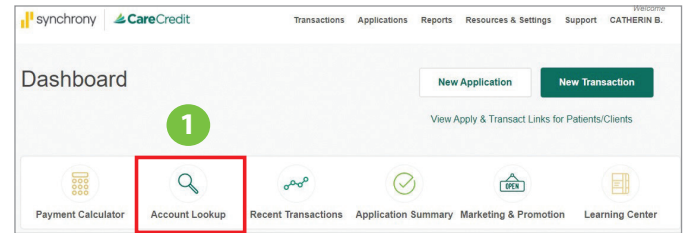
NOTE: Patients can have providers edit their loan amount before or after signing as long as the new amount is within their approved limit. Providers can only decrease the amount or revert to the original agreement until the loan is funded. A funding initiation for today must be submitted prior to 12:00 EST and cannot be changed after that time.



Synchrony Pay Monthly - Reports

Account Lookup

- 1 From the dashboard, select **Account Lookup**.
- 2 Choose from search methods available. Enter the required information and click **Search**.
- 3 Locate the cardholders Pay Later account and click **Select**.
- 4 Click to perform actions such as:
 - **Issue A Refund**
 - **Send to Customer**
 - **Cancel Loan**
 - **Manage Loan**
 - Update Funding Initiation Date
 - Update Loan Amount **BEFORE** it is signed



NOTE: Changing the loan amount after the patient signs will not reduce the monthly payment.

- **Before the patient signs:** the provider may edit the loan amount, as long as it remains within the patient's approved limit.
- **After the loan is signed (and before funding):** the provider may only (1) lower the loan amount or (2) revert to the original signed agreement—however, **lowering the amount at this stage does not change the monthly payment.**

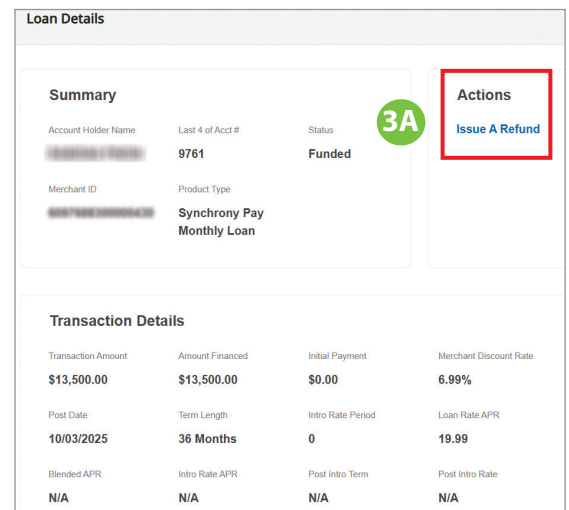
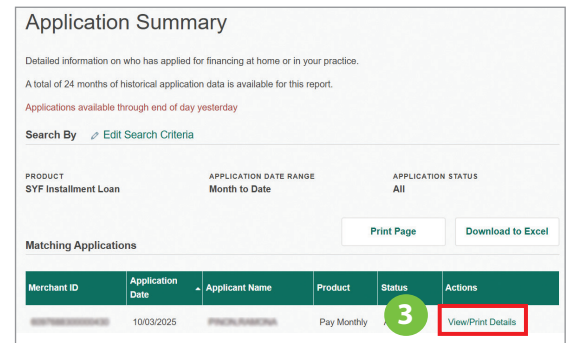
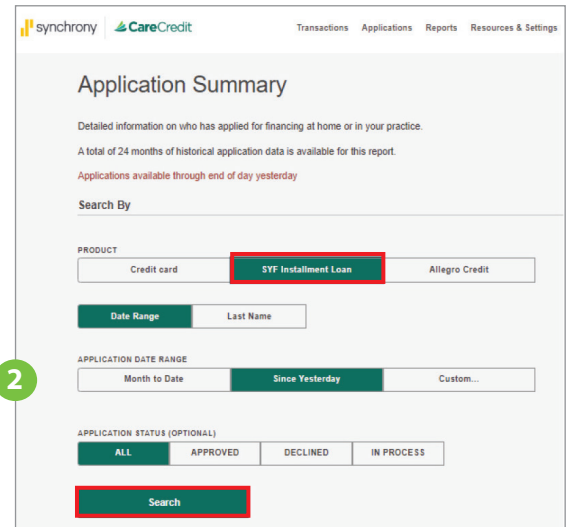
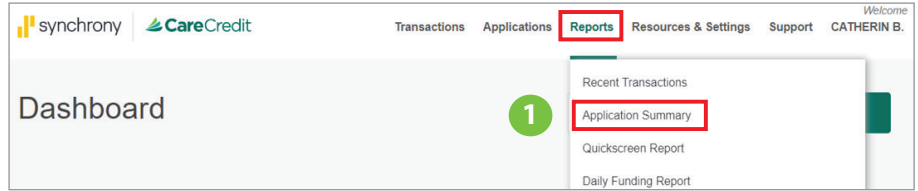
Loan Status:	Definition:	Available Actions:
Approved, Not Signed (Hold My Loan)	The application has been approved and has yet to be finalized by the patient/client signing the Truth in Lending disclosure. The patient/client has 7 days to decide if they want to move forward before signing.	Update Loan Amount Send to Customer
Signed, Unscheduled	The customer's loan is approved, and they have signed their Truth in Lending disclosure. The next step is to schedule the loan.	Update Loan Amount Update Funding Initiation Date Cancel Loan
Signed, Scheduled	The customer's loan is approved, they have signed their Truth in Lending disclosure, and a service date has been set.	Update Loan Amount Update Funding Initiation Date Cancel Loan
Funding in Progress	The funds have been sent based on the scheduled date.	No Available Actions

Synchrony Pay Monthly - Reports

Application Summary Report

Detailed information on who has applied for financing at home or in your practice. A total of 24 months of historical application data is available for this report.

- 1 Under **Reports**, select **Application Summary**.
- 2 Select **SYF Installment Loan**, choose search criteria, and click **Search**.
- 3 Once the transaction you are searching or has been identified, click **View/Print Details** for more information.
- 3A Click to perform actions such as:
 - **Issue A Refund**
 - **Send to Customer**
 - **Cancel Loan**
 - **Manage Loan**
 - Update Funding Initiation Date
 - Update Loan Amount **BEFORE** it is signed



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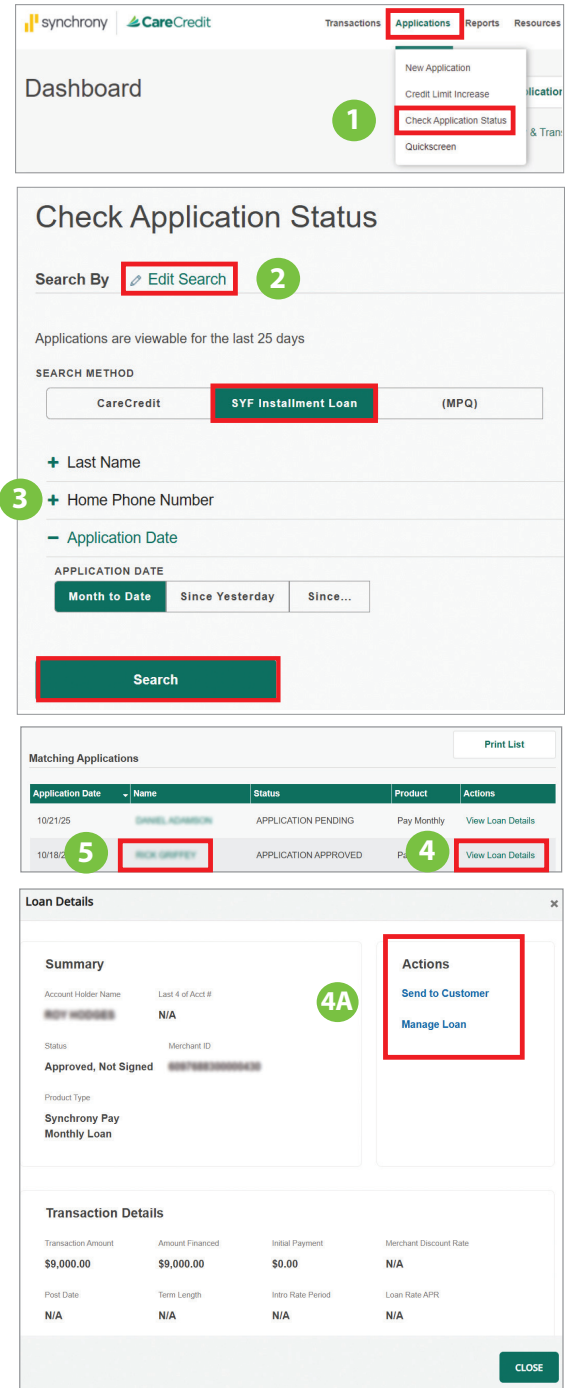
Synchrony Pay Monthly - Reports

Use the Check Application Status report to view details about Pay Monthly loans, resend applications, and issue refunds.

Check Application Status Report

Applications are viewable for the last 25 days.

- 1 Under **Applications**, select **Check Application Status**.
- 2 Click **Edit Search Criteria**.
- 3 Select **SYF Installment Loan**, choose search criteria, and click **Search**.
- 4 Once the application you are searching for has been identified, you may click **View Loan Details** for more information.
- 4A Click to perform actions such as:
 - **Issue A Refund**
 - **Send to Customer**
 - **Cancel Loan**
 - **Manage Loan**
 - Update Funding Initiation Date
 - Update Loan Amount **BEFORE** it is signed



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- **After the loan is signed (and before funding):** the provider may only (1) lower the loan amount or (2) revert to the original signed agreement—however, **lowering the amount at this stage does not change the monthly payment.**

- 5 If an application was in a pending status, and the applicant has cleared it by phone, you can click their name to resend the application.

IMPORTANT: Once the application is approved and terms and conditions are accepted, the loan initiates and funds within 2-3 business days, unless the funding date is altered. Providers should verify approval via Provider Center's Check Application Status report before beginning work.

Loan Status - select the appropriate filter in Check Application Status.

SYF Installment Loan = View approved and accepted loans

MPQ = View declined or loans still in process

CareCredit = View approved and accepted CareCredit applications

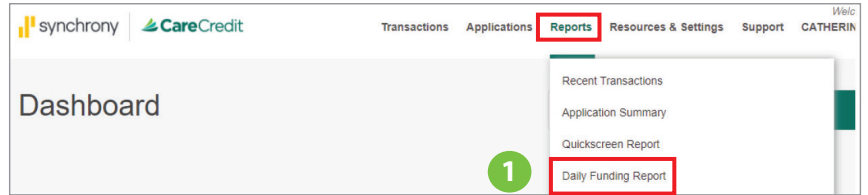
Loan Status:	Definition:	Available Actions:
Approved, Not Signed (Hold My Loan)	The application has been approved and has yet to be finalized by the patient/client signing the Truth in Lending disclosure. The patient/client has 7 days to decide if they want to move forward before signing.	Update Loan Amount Send to Customer
Signed, Unscheduled	The customer's loan is approved, and they have signed their Truth in Lending disclosure. The next step is to schedule the loan.	Update Loan Amount Update Funding Initiation Date Cancel Loan
Signed, Scheduled	The customer's loan is approved, they have signed their Truth in Lending disclosure, and a service date has been set.	Update Loan Amount Update Funding Initiation Date Cancel Loan
Funding in Progress	The funds have been sent based on the scheduled date.	No Available Actions

Synchrony Pay Monthly - Reports

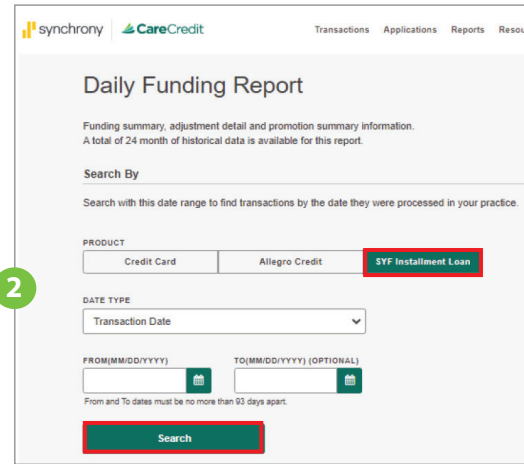
Daily Funding Report

After funding, this report shows the date, promotional information, and daily totals for online sales, discount and net funding deposited to your account. Locate a transaction during a specific time frame. Reconcile end-of-day activity. A total of 24 months of historical data is available for this report.

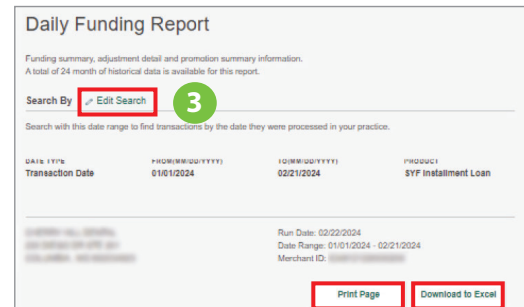
1 Under **Reports**, select **Daily Funding Report**.



2 Select **SYF Installment Loan**, choose search criteria, and click **Search**.



3 Click **Edit Search** to further filter search criteria. You may either print the page or download the information to Excel.



4 View Funding Summary, Funding Detail by Date, Adjustment Detail, and Promotion Summary for transactional information during the time specified.

