Enterprise Payment Solutions™

JHA EPS SmartPay Business℠

October 2016

An Introduction to SmartPay Business for Merchants

Contents

Introduction to SmartPay Business

Enterprise Payment Solutions is proud to present SmartPay Business, the updated version of the Merchant Portal. While all of the system features and content are the same, the application has a new look and feel to make daily tasks and information management easier. SmartPay Business (SPB) contains multiple enhancements, including the following features that promote a better payment experience.

- Streamlined navigation to simplify accessing key areas and provide direct links to frequently visited pages
- Modern design that uses customizable display
- Responsive Web design to accommodate a variety of devices, screen sizes, and browsers
- Improved sorting and filtering options to make it easier to manage large-scale data displays
- Intelligent use of common colors to consistently represent repeated action types

This document highlights ways to use the new features in SPB and includes a list of available reports.

Available Resources

The following resources are available for more information about EPS materials.

- **Documentation** – From the *Downloads* page in the Partner Portal, you can download release notes, documentation (including user handbooks), and supplemental materials. Updates to applications will be documented and provided with each release, as applicable. For documentation inquiries or comments, please contact epspublications@profitstars.com.
- **Education** – Learning classes are available through the Education department. Please contact epseducation@profitstars.com to learn more about working with EPS products and registering for classes.
- **Support** – For specific questions about an application, please contact our Customer Support team at 877-542-2244 or at epssupport@profitstars.com.

Navigational Features

Top Menu Bar

Use the top menu bar to search for specific transactions, find a customer, or access user settings.

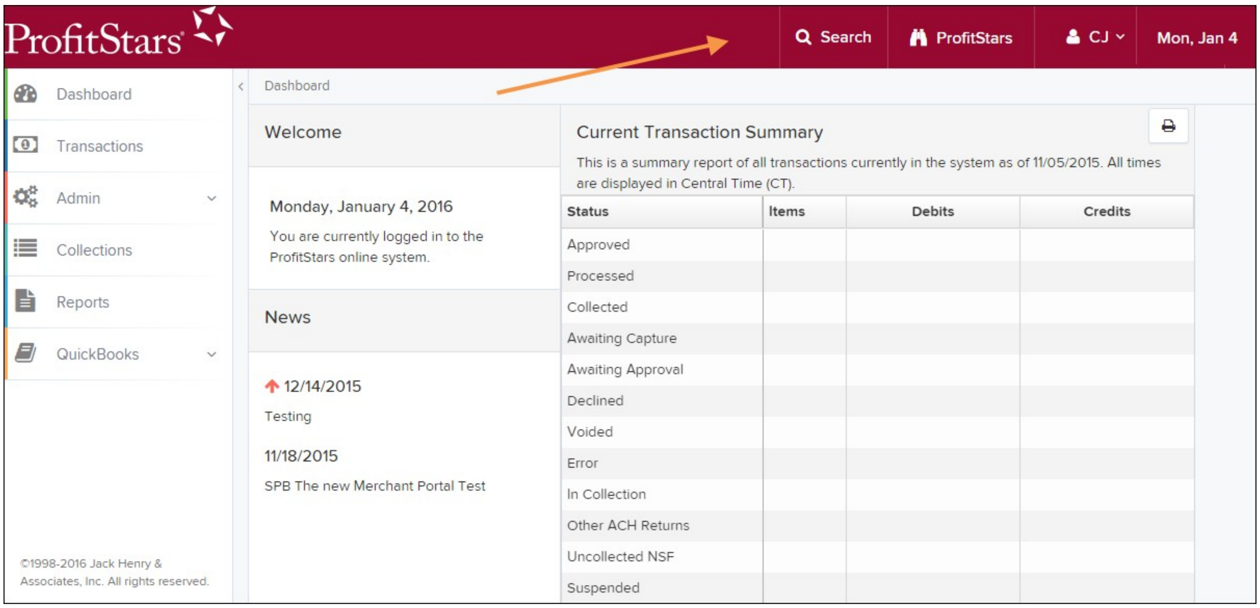


FIGURE 1 – TOP MENU BAR

- Your financial institution's logo will display at the top on the left.

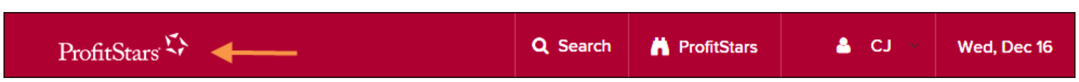


FIGURE 2 – FINANCIAL INSTITUTION LOGO

- Use the **Search** button to search for customer information or transaction data.

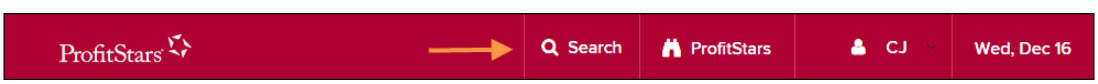


FIGURE 3 – SEARCH BUTTON

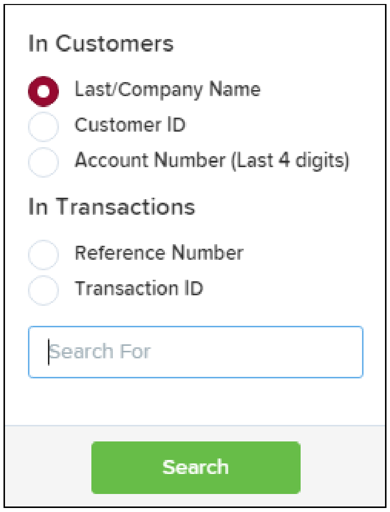


FIGURE 4 – SEARCH FILTER CRITERIA

- Select the **User drop-down to** access user settings, FAQs, videos, or to log out of the site.

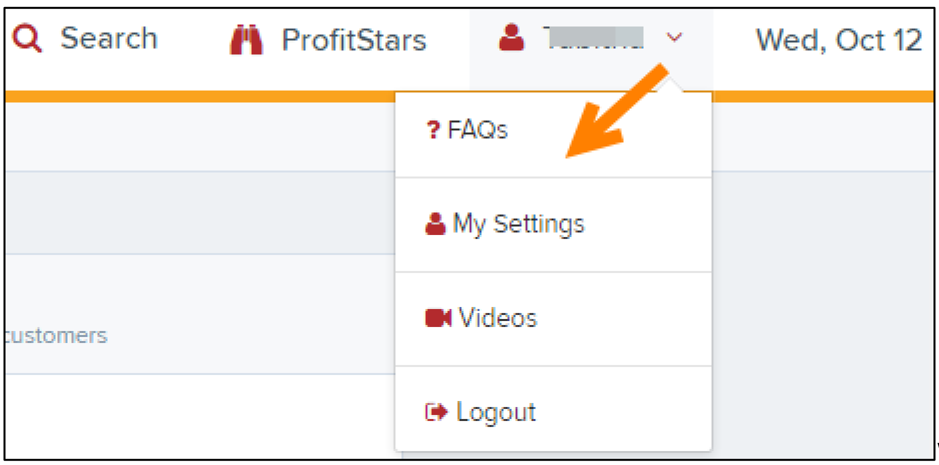


FIGURE 5 – USER DROP-DOWN

- The current **Date** will display in the top right corner.

Left Main Menu

The left main menu contains primary options such as **Transactions** or **Reports** that allow you to navigate throughout major features in the system. Collapse this menu by selecting the vertical bar attached to the left main menu.

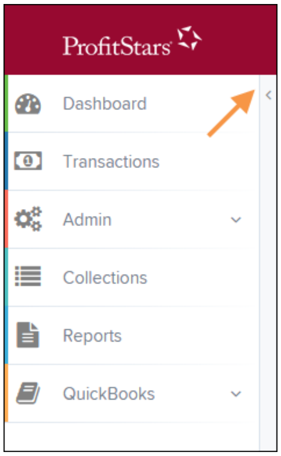


FIGURE 6 – MAIN MENU, EXPANDED

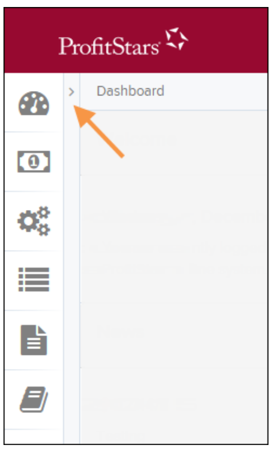


FIGURE 7 – MAIN MENU, COLLAPSED

Each primary category on the main menu may contain additional sub-options based on user permissions. All sub-options under primary categories will relate to that primary category. For example, all sub-options under the Admin tab relate to that topic.

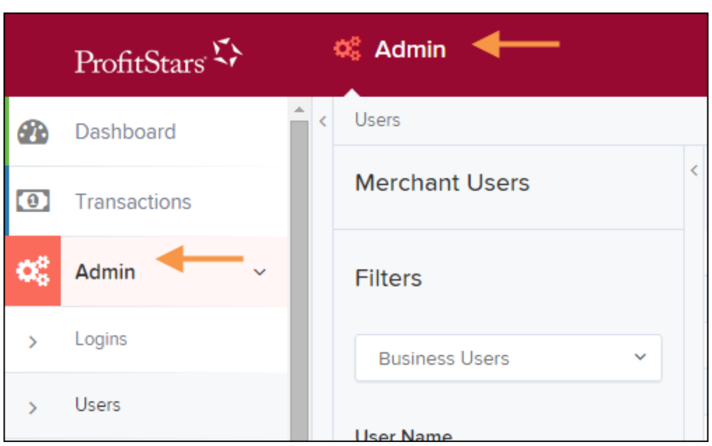


FIGURE 8 – TOP MENU HEADING

Collapsing/Expanding Panels

Other panels throughout the application are also collapsible. All panels appear expanded by default upon logging in to the system.

- To collapse an expanded area, select the up arrow
- To expand a collapsed area, select the down arrow

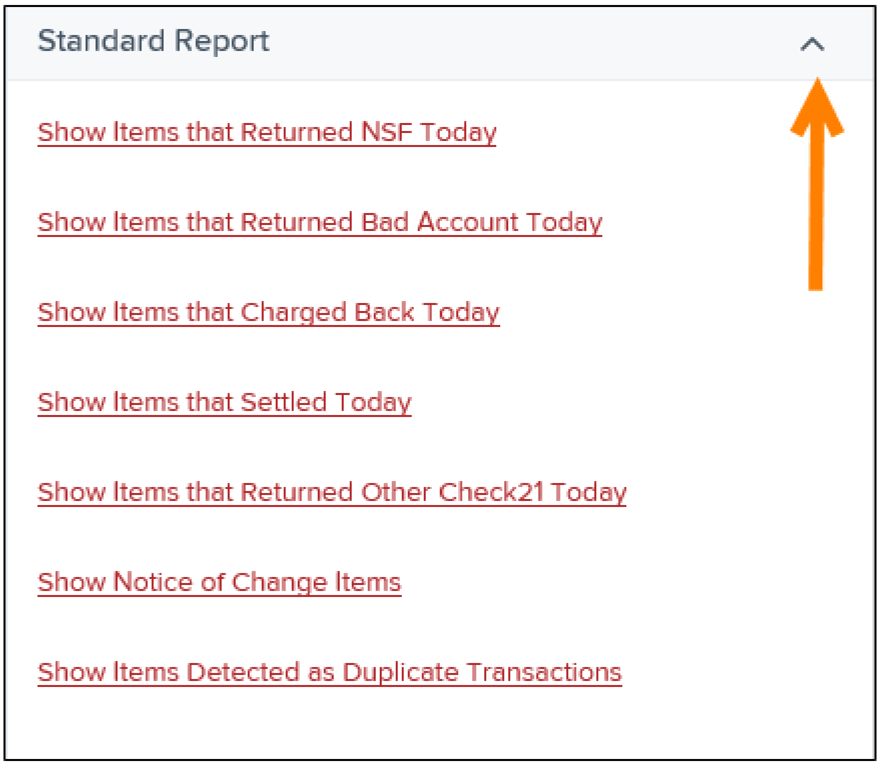


FIGURE 9 – COLLAPSIBLE PANELS IN APPLICATION

Dashboard

News Section

You can check this area for any announcements or alerts from your financial institution. This section is located under the *Welcome* box on the left side of the *Dashboard* page.

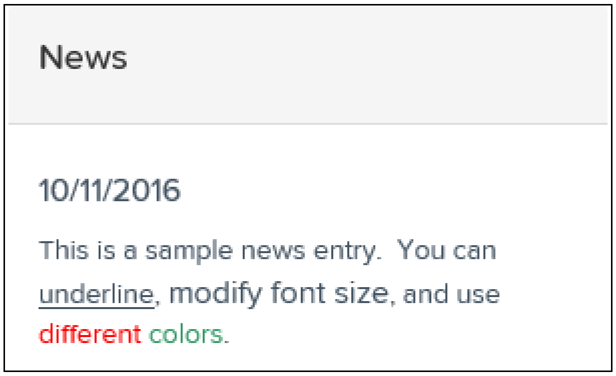


FIGURE 10 – NEWS SECTION

Helpful Hints – Current Transaction Summary

On the *Current* Transaction *Summary* page, you can hover over an item in the *Status* column to see a description of each status (shown below).

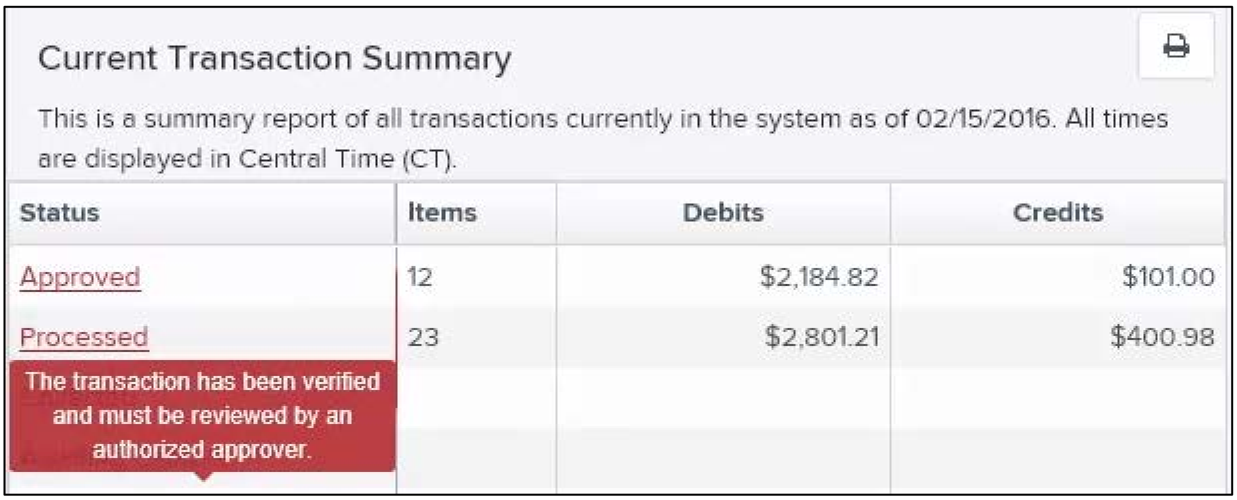


FIGURE 11 – HOVER HINT FOR CURRENT TRANSACTION SUMMARY

Transactions

Here you can find Quick Links and Guided Payments to allow for quicker navigation. With Guided Payments, you can go directly to all products that process a specific transaction type by choosing the products you have enabled, as shown in the example below.

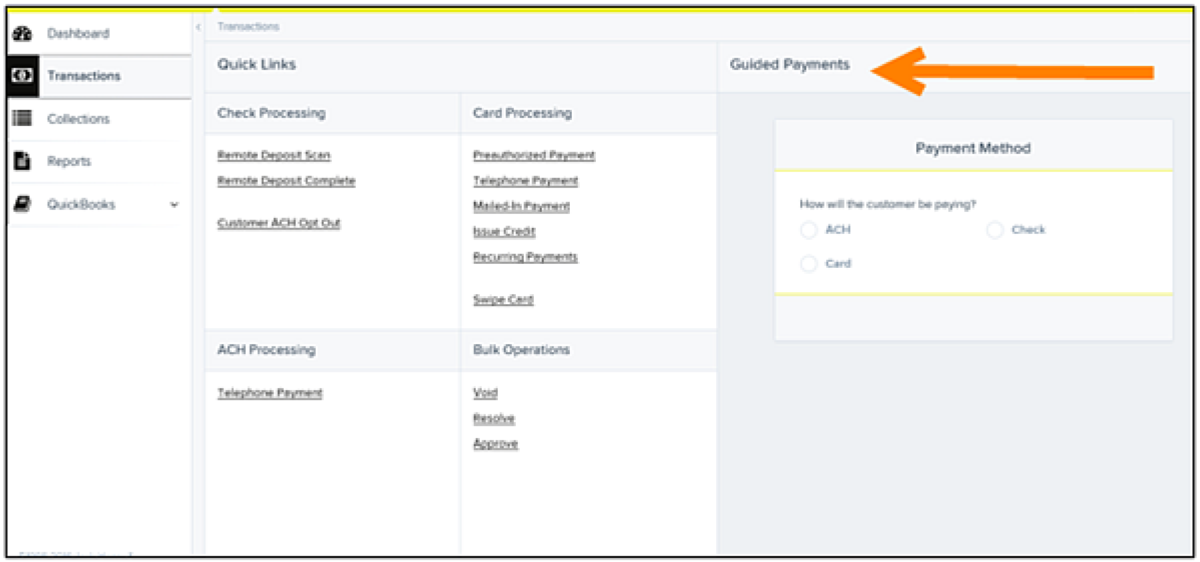


FIGURE 12 –TRANSACTIONS MENU OPTIONS

Admin

Creating and Configuring Users

Admin users set up new users, assign roles to users, and reset and unlock users.

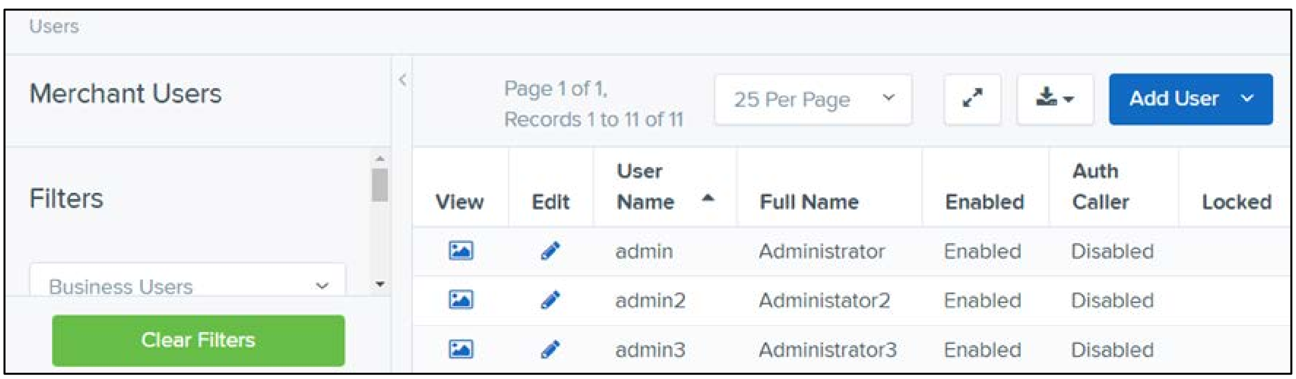
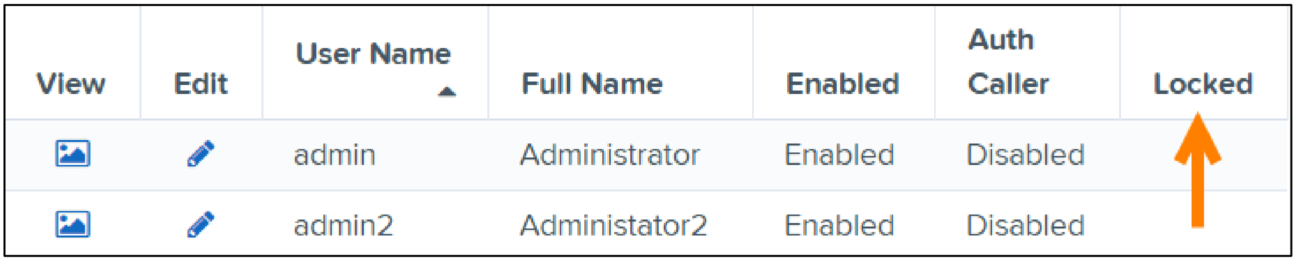


FIGURE 13 – USERS PAGE

Unlocking a User Profile

Users within your organization can be locked out of the system. As the Admin, you are responsible for unlocking SPB user profiles so that employees can access the system again. If the Admin is locked out, contact your first line of support for assistance.



View	Edit	User Name	Full Name	Enabled	Auth Caller	Locked
		admin	Administrator	Enabled	Disabled	
		admin2	Administator2	Enabled	Disabled	

FIGURE 1 - UNLOCKING A USER

If the user needs a new password, you will need to reset it.

Resetting a Password

Users may forget their password and ask you to provide them with a new, temporary one.

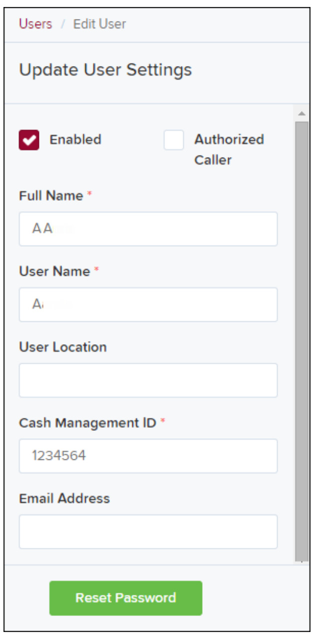


FIGURE 15 – RESET PASSWORD BUTTON

Reporting & Tools

Reports include some new features for customizing the information displayed in each report.

- **Pagination** – Use page arrows to navigate through pages of records, or you may change the number of records that display per page (as shown below).

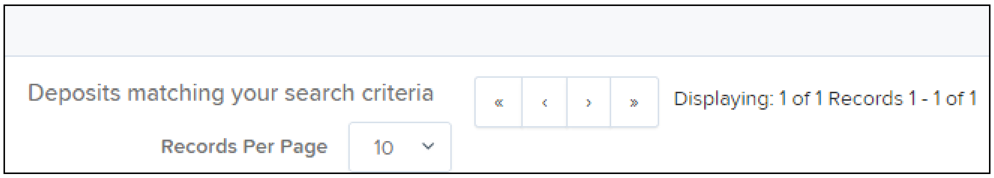


FIGURE 16 – PAGINATION

- **Filter Columns** – Select **Filter Columns** when viewing a report to determine which columns of information to view, prioritize how they appear on reports, or freeze a column in place on the page. Changes made to column view, column priority, or column freeze will be saved and presented to a user each time the report is accessed. For Standard Reports, these settings are remembered after the user saves the report to either My Reports or Shared Reports.

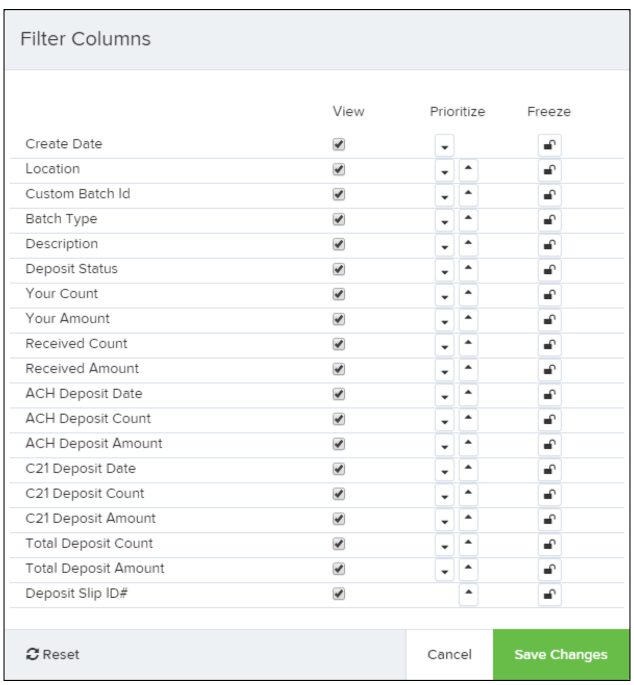


FIGURE 17– FILTER COLUMNS

- Select **Filter** to display searchable fields that will filter report information based on the criteria entered.

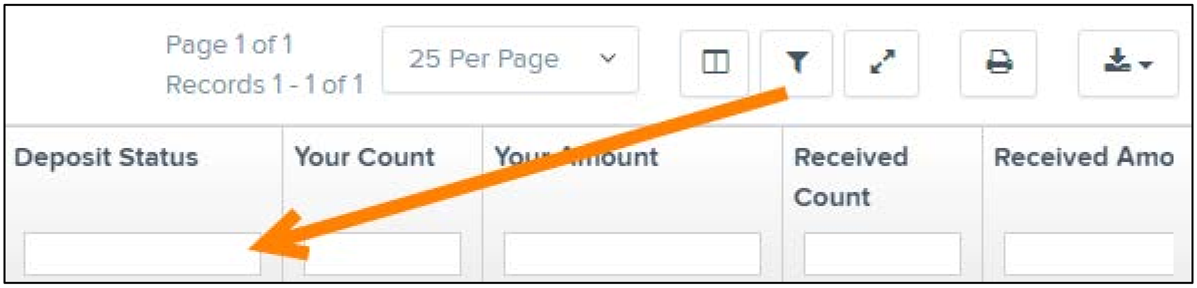


FIGURE 18 - FILTER BUTTON AND FILTER FIELD

- Use **View mode** to expand the reporting results to a full page. Use the same button to revert back to a normal view.
- Use **Print** to produce paper copies of reports. Printing in landscape mode allows you to print more data columns per page than portrait mode.
- The **Export** menu has options for exporting report results in several formats.

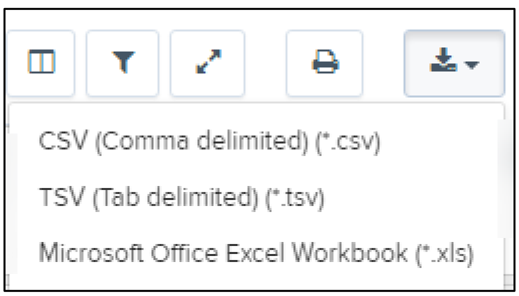


FIGURE 19 – EXPORT MENU OPTIONS

List of Reports

You may choose to run one of the following reports or to create your own with customized filters.

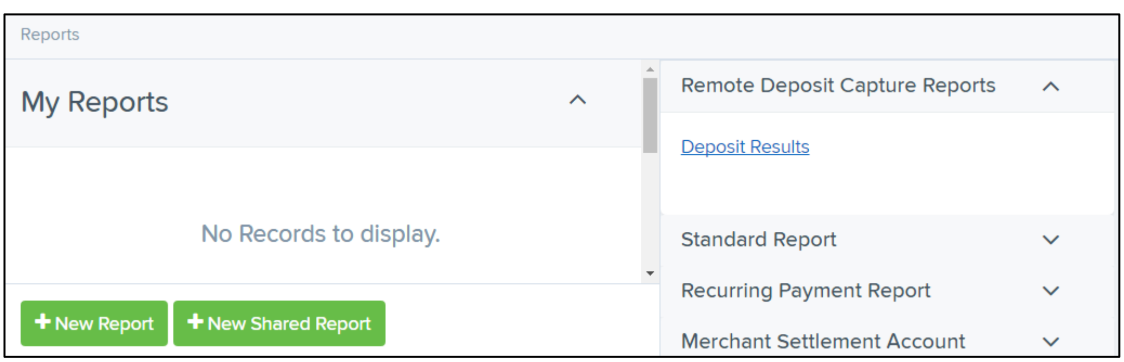


FIGURE 20 – REPORTS PAGE

Under the *Remote Deposit Capture Reports*, which includes deposit results from customers, is the *Deposit Results* report.

- *Standard Reports* – Reports with preset filters.
    - *Show Notice of Change Items*
    - *Show Items that Returned NSF Today*
    - *Show Items that Returned Bad Account Today*
    - *Show Items that Charged Back Today*
    - *Show Items that Settled Today*
    - *Show Items that Returned Other Check21 Today*
    - *Show Items Detected as Duplicate Transactions*
- *Recurring Payment Report* – Recurring payment reports with preset filters.
    - *Show Recurring Payments That are Disabled*
    - *Recurring Payments Due*

The *Merchant Settlement Account Reports* section tracks credits and debits to your merchant settlement account with the *Credits and Debits to Your Merchant Settle*

Tooltips and Other Features

Additional features, such as tool tips, provide quick information while you work in the system.

- Tool tips include information that defines a field or tells more about that option, and can be accessed by hovering over the options.

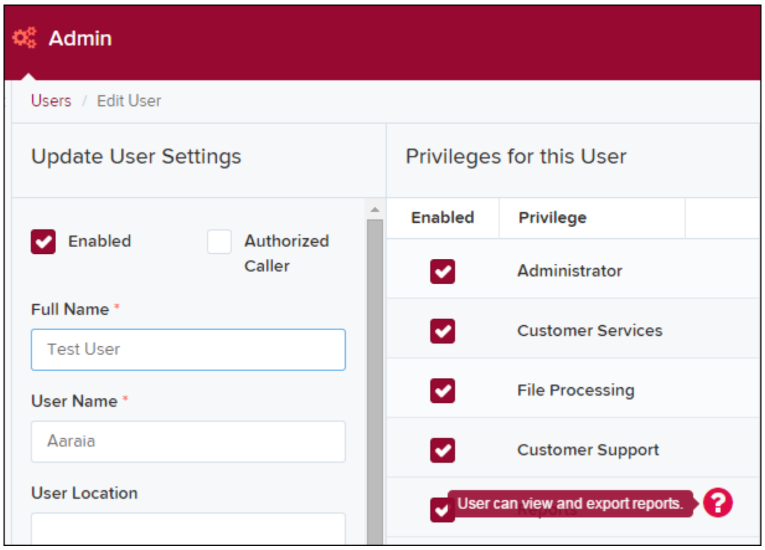


FIGURE 21 - TOOL TIP

- Printing icons are available in the system for printing information. Use  **Print** to begin the printing process from within the application.
- Options to create, save changes, cancel, or clear filters are features inside specific buttons. Look for buttons and icons to perform actions in the system, as in the examples displayed below.

FIGURE 22 – ACTION BUTTONS

- As depicted in the following image, some action buttons contain a drop-down feature with an option(s).

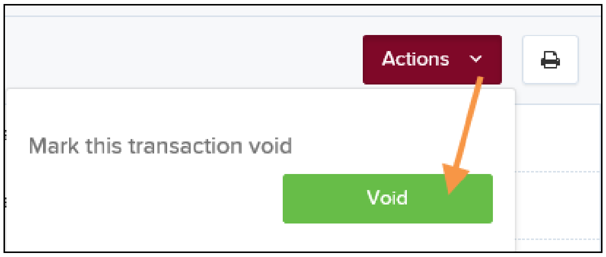


FIGURE 23 – DROP-DOWN ACTION BUTTON

- Other action buttons are set beside fields, such as editing a transaction or account.

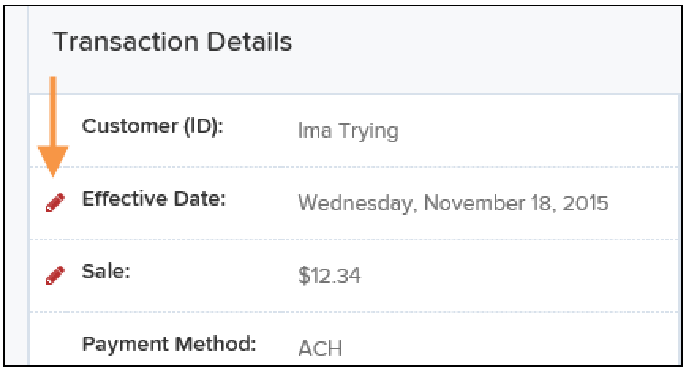


FIGURE 24 – ACTION BUTTON BESIDE INFORMATION FIELD

- Lastly, making changes to fields in the system will sometimes require a confirmation. For example, select the check box to confirm (or cancel) edits make to a transaction.

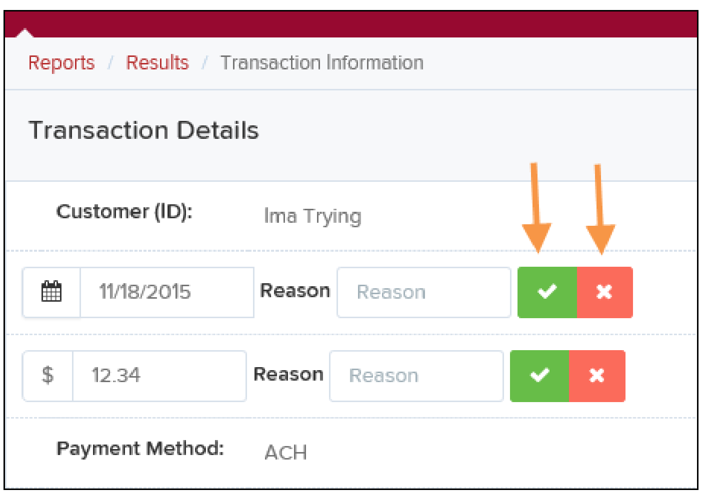


FIGURE 25 – CONFIRMATION BUTTONS FOR SAVING CHANGES/EDITS

