

# Enterprise Payment Solutions™

JHA EPS SmartPay Business<sup>SM</sup>

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## SmartPay Business – Tips, Tricks, and Frequently Asked Questions

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# Frequently Asked Questions

The following list includes a few of the common questions on SmartPay Business that have been posed to Customer Support. You may have similar questions as you begin to use the application.

**Q. Where is the link to log out?**

A. In the application, links to access frequently asked questions (**FAQs**), **My Settings**, and **Logout** have been placed within your username drop-down menu.

**Q. What do the  lock icons in the reports do?**

A. This is a freeze function that will lock in the header to one of the top three spots.

**Q. What is Guided Payments?**

A. Guided Payments, a new feature that will aid users in identifying the right product for their transactions, takes you through a short series of questions in order to help you determine the type of payment you are making.

**Q. Do you have any tips for printing reports?**

A. Landscape mode is the preferred orientation for printing. To ensure that information is not cut off the page, be sure to choose this orientation when taking the option to print reports.

**Q. Where is Payment Wizards?**

A. The Payment Wizards function is now included under *ACH Processing* and *Credit Card Processing*. Here, users will have a choice between **Quick Pay** and **Add/Search Customer**.

**Q. What is the proper zoom percentage for SPB?**

A. The SPB application works best when the webpage is set to 100% zoom.

**Q. Where is my home page?**

A. The home page is now called the *Dashboard*, and is located on the top, left-hand side of the webpage.

**Q. How do I find the FAQs for this new site?**

A. FAQs are found under your username drop-down at the top right of the webpage.

**Q. How do I change my password?**

A. Go to your username pull down at the top-right of the webpage and click on **My Settings**. Retype your current password and the next screen allows you to change your password.

**Q. How do I reset another user's password?**

A. Go to the **Admin** tab on the left side of the webpage. Click on **Users**, find the user's profile, and then click **Edit** (the pencil icon) to the left of the user's name. On the next page, you will see a green box titled **Reset Password** at the bottom under *Update User Settings*.

**Q. How do I export a report?**

A. The export pull-down box is listed at the far-right, top of the *Report* page and allows you three export options: CSV, TSV, and Microsoft® Excel®.

**Q. When scanning items I have noticed that the icons for editing, deleting, or rescanning items is not on the screen. I have to scroll to the right to see them.**

A. You may resize your screen by selecting the **gear icon** in the upper-right corner and setting your zoom to a smaller percentage until the icons display. Or, you may hold down your **<CTRL>** button while scrolling the wheel on your mouse forward or back to increase or decrease your screen size.

**Q. How do I void an item that is in *Approved* status? I no longer have a link off to the side.**

A. Select the item that you wish to void and then select the pull-down arrow on the **Actions** button that is next to the **print icon**. A green **Void** button will appear. You can *Resolve* your item in the same fashion.

**Q. I used to be able to perform bulk check operations before. Where do I find them now?**

A. Select **Transactions**. You will find **Bulk Operations** listed there.

**Q. I had some custom reports created when using the Merchant Portal. Will they appear within SPB or do I have to re-create them?**

A. All custom reports that were created within Merchant Portal will automatically migrate over to SPB.

- Q.** When viewing an item in *Approved* status, is there an easier way to view a different item other than selecting *Dashboard* again and then *Approved* to get the list to display?
- A.** Yes. There are breadcrumbs listed at the top of the page that will show where you are. Selecting **Results** will display the list again.



# Tips and Tricks

Below are several hints to help you utilize some of the important features available in SmartPay Business. These points of reference have been collected from Customer Support calls, to assist you in optimizing the application for your particular use.

1. In the *Deposit Results Report*, clicking on the **Report Layout** icon will give the user the ability to determine which columns show and in what order.
2. Panels can be collapsed to allow more information to be seen on the page.
3. The **Toggle icon** can be used to find items quickly, especially when there are a large number of results.
4. Breadcrumbs are now at the top of the page. These provide users the ability to jump to a previous page.
5. In the *Open Deposits* screen of Remote Deposit Complete™ (RDC), the user can click anywhere on the line bar of a deposit, and that will select the deposit to be closed or deleted.
6. When reviewing *Item Details* for the *Deposit Results Report* if the list has more than 25 items, you can click on the **Per Page** drop-down filter at the top-right of the screen to change the option to fit all items in the list, up to 500 items per page.
7. You can search for deleted users when logged in as an administrator by going to the **Admin** tab, clicking on **Users**, and then under the *Filters* drop-down change the selection to **Deleted Users**.
8. Assign users the *RDC User* role for users you wish to *scan* your items, but not deposit items without review. The *RDC Admin* role will be used to actually deposit the items.
9. Use the **Show Items Detected as Duplicate Items** setting to review why items have been flagged as being duplicates.
10. Turn on the *PDF* role for the *Credits&Debits Report* so that your merchant can see the images associated with the items for the deposit that is in their settlement account.
11. Hovering over the different statuses on the *Dashboard* screen will display pop-ups that provide insight into what the different fields mean.
12. When viewing multiple items in a report, you may sort them from least value to greatest value by clicking on the **Amount** field. Clicking on the field again will sort from greatest value to least value.
13. Input three underscores within the **Last/Company Name** field to get a list of all of the merchant's customers.
14. Using the *Report Layout* area of your new report will allow you to select the fields that you want to have displayed, as well as the order in which the report will display them.
15. The **Report Layout Options** toggle will allow you to change fields within the *Credits&Debits Report*.

16. Click on the **New Shared Report** link to create a report that will be set up to *automatically* be shared with other portal users. Simply choose the report criteria, provide a name for it, and then save it.
17. Use the *Advanced* filters to segregate credits from debits via the **Operation** field. Selecting **Credit** here will display only those transactions that are credits.