



SmartPay Business

Frequently Asked Questions

Q. Where is the link to log out?

A. In the application, links to access frequently asked questions (**FAQ**), **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 is a new feature that will aid users in identifying the right product for their transactions. It takes you through a short series of questions 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 SmartPay?

A. The SmartPay 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. 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 old Merchant Portal. Will they appear within the SmartPay portal or do I have to re-create them?

A. All custom reports that were created in the old Merchant Portal will automatically migrate to your new SmartPay portal.

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.