



## SmartPay Business

### Tips and Tricks

Here are several hints to help you utilize some of the important features available in SmartPay Business.

1. Panels can be collapsed to allow more information to be seen on the page.
2. The Toggle icon can be used to find items quickly, especially when there are a large number of results.
3. Breadcrumbs are now at the top of the page. These provide users the ability to jump to a previous page.
4. In the Open Deposits screen of Remote Deposit Complete (RDC), you can click anywhere on the line bar of a deposit, and that will select the deposit to be closed or deleted.
5. 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.
6. 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.
7. 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.
8. Use the Show Items Detected as Duplicate Items setting to review why items have been flagged as being duplicates.
9. Hovering over the different statuses on the Dashboard screen will display pop-ups that provide insight into what the different friends mean.
10. 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.
11. 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.
12. The Report Layout Options toggle will allow you to change fields within the Credits & Debits Report.
13. 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.
14. Use the Advanced filters to segregate credits from debits via the Operation field. Selecting Credit here will display only those transactions that are credits.