JHA Payment Solutions™
Enterprise Payment Solutions, JHA
SmartPay Business™

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SmartPay Business FAQs and Tips

For Financial Institutions

SmartPay Business FAQs

This list includes common questions users have about SmartPay Business and tips to help new users.

Where is the link to log out?

In the application, links to access *FAQs*, *My Settings*, *Videos*, and *Logout* are in your username drop-down menu.

What do the lock icons in the reports do?

Lock is a freeze function that locks in the header to one of the top three spots.

What are Guided Payments?

Guided Payments aids you in identifying the right product for your transactions. It takes you through a short series of questions to help you determine the type of payment you are making.

Do you have any tips for printing reports?

Landscape mode is the preferred orientation for printing. To ensure that information is not cut off the page, choose this orientation when printing reports.

Where is Payment Wizards?

The Payment Wizards function is included under the *ACH Processing* and *Credit Card Processing* sections. From these sections, users can choose between **Quick Pay** and **Add/Search Customer**.

What is the proper zoom percentage for SPB?

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

Where is my home page?

Your home page is the *Dashboard*. The **Dashboard** tab is on the top, left-hand side of the webpage.

How do I find the FAQs for this new site?

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

How do I change my password?

Go to your username drop-down menu. Select *My Settings*. Retype your current password. The next screen allows you to change your password.

How do I reset another user's password?

Go to the **Admin** tab on the left side of the webpage. Select **Users**, find the user's profile, and then select **Edit** 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 the *Update User Settings*.

How do I export a report?

The export drop-down menu is listed at the far-right, top of the *Reports* page and allows you three export options: CSV, TSV, and Microsoft® Excel®.

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

Resize your screen by selecting **Settings** in the upper-right corner and set your zoom to a smaller percentage until you see the icons.

Where do I find bulk check operations?

Bulk operations are under the *Transactions* tab.

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 appear?

Yes. There are breadcrumbs listed at the top of the page that shows where you are. Selecting **Results** displays the list again.

Tips

This list features hints for some of the tools and functions in SmartPay Business.

Display

- On the *Dashboard* page, use the **Settings** button to change the page's appearance. Use toggle buttons to hide or show panels, and to expand and collapse panels. To change the order that items on the page are viewed, use the up and down arrows under the *Priority*. Use the **X** button to close settings.
- Use **Advanced** filters to segregate credits from debits via the **Operation** field. Select **Credit** to show credit transactions.

Interface Controls

- Use breadcrumbs at the top of the page to navigate to a previous page.
- On the *Current Transaction Summary*, hover over the different statuses to see tooltips about a status. The summary is on the *Dashboard* page.
- On the *Open Deposits* screen of JHA SmartPay Remote Deposit Complete (RDC), click anywhere on the line bar of a deposit to close or delete that deposit.
- The **Toggle Filter** button is used to find items quickly, especially when there are many results.
- Input three underscores within the **Last/Company Name** field to get a complete list of a customer's consumers.
- Use the **Show Items Detected as Duplicate Items** setting to review why items have been flagged as duplicates.

Reports

- Turn on the *PDF* role for the *Credits and Debits to Your Merchant Settlement Account* report so customers see the images in their settlement account that are associated with the items for the deposit.
- Click the **New Shared Report** link to create a report that is set up for automatic sharing with other users. Choose the report criteria, provide a name for it, and save it.

Sorting and Viewing

- For reports, click the **Report Layout option** button to give users the ability to determine which columns show and they order in which they appear.
- To sort reports from least value to greatest value, click the **Amount** field. Click the field again to sort from greatest value to least value.

Users

- Ensure that every user profile contains an email to allow users to reset their own passwords, as long as the **User Name** and **Company** fields are completed correctly.
- Click **Users** under the *Admin* tab to search for deleted users when logged in as an administrator. Under the **Filters** drop-down menu, change the selection to *Deleted Users*.
- Assign the *RDC User* role to users who scan items, but do not deposit items without review. Assign the *RDC Admin* role to deposit the items.

Available Resources

There are several resources available to help you with SmartPay Manager. The following resources are available for more information about EPS materials.

Documentation

From the *Resources* page of SmartPay Manager, you can download release notes, documentation (including user handbooks), and supplemental materials. Updates to applications are documented and provided with each release, as applicable. For documentation inquiries or comments, contact *epspublications@jackhenry.com*.

Education

Learning classes are available through the Education department. Contact *epseducation@jackhenry.com* to learn more about working with EPS products and registering for classes.

Support

For specific questions about an application, contact our Customer Support team at 1-877-542-2244.

Resource Center

For free marketing collateral to use in creating a marketing campaign using banner ads, landing pages for websites, email acquisition campaigns, and short videos to demonstrate products offered by your financial institution. These resources can help you create awareness of competitive products your financial institution offers that your competitors may not, offer your customers/members products to save them time and money, and develop relationships with customers/members outside your current target areas. For more information, contact *jpsmarketing.support@jackhenry.com* or call 1-866-851-4729 Ext. 709444.

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