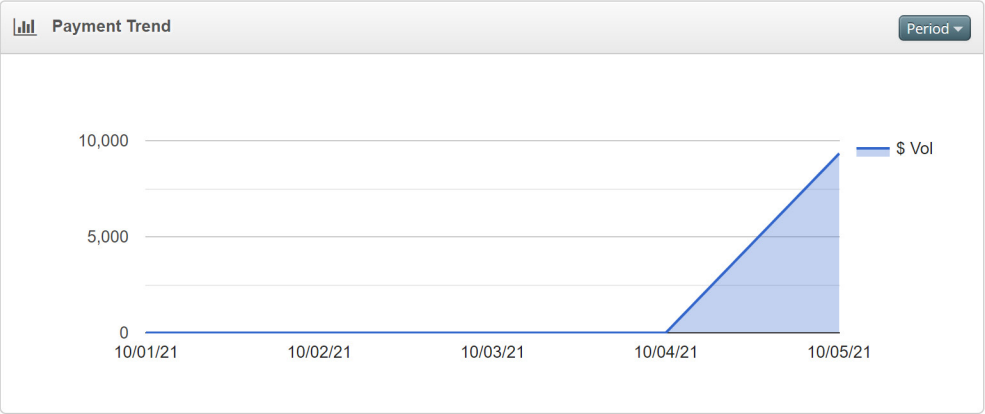




# IntelliPay Payment Suite Users Guide

Credit Cards	ACH/Echeck	Cash	Volume	Total
9	5	0	\$9,325.74	14



Payments by Origin	
ONE TERMINAL	7
ONLINE PAYMENT PAGE/PORTAL	5
LIGHTBOX	2
RECURRING	0
BATCH	0
MOBILE	0
API	0

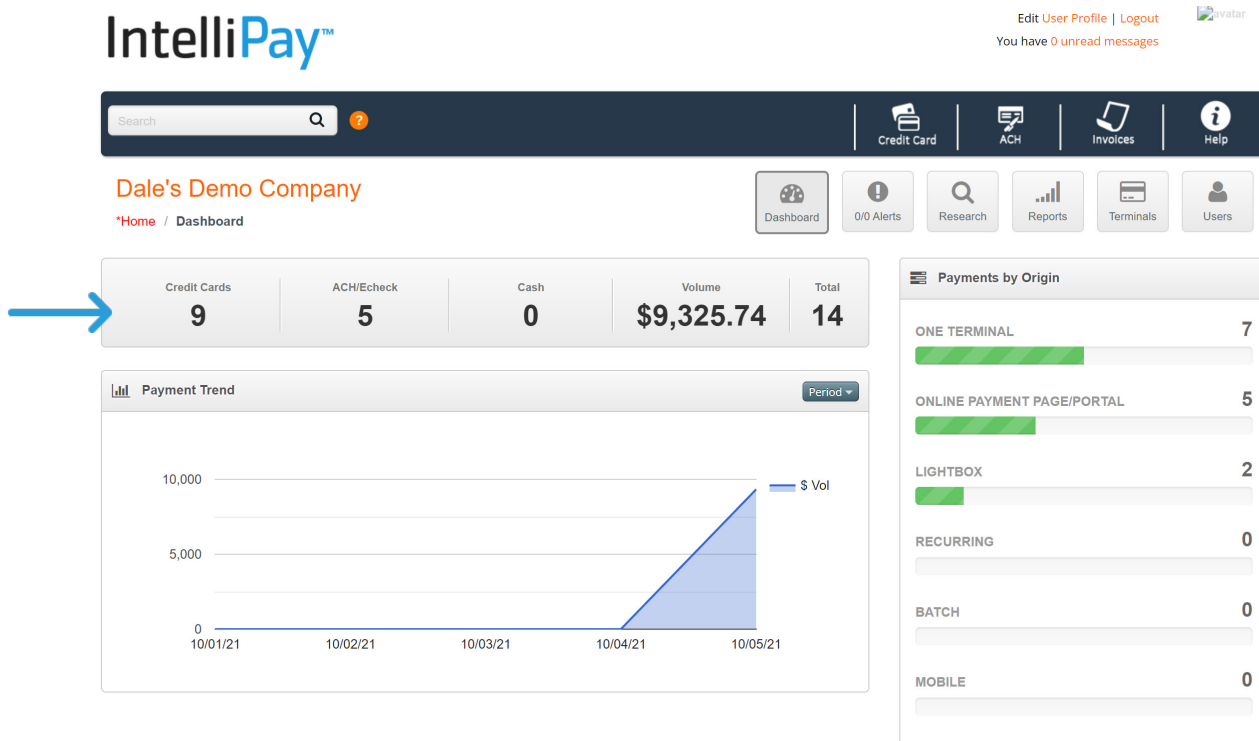
# Dashboard Overview



## I. Dashboard Overview

### A. Dashboard Scoreboard

The first thing a user sees when they login to their account are the monthly totals.

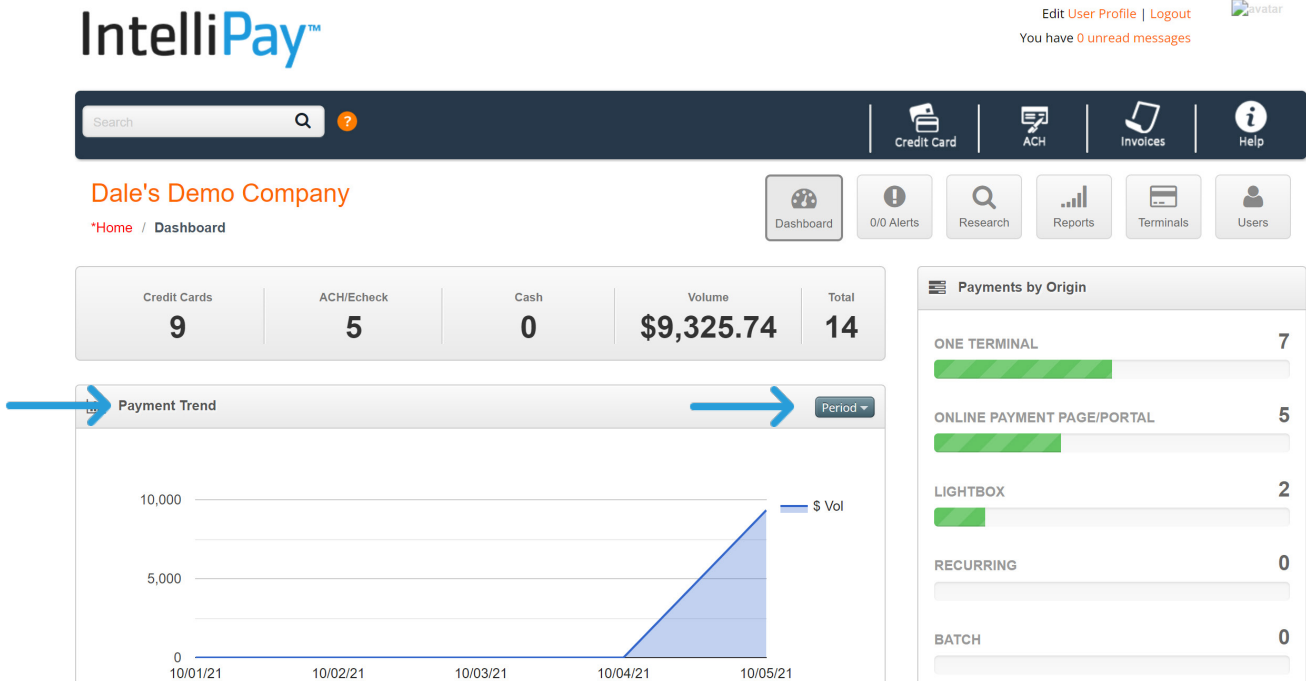


These numbers provide a running count for all of your credit card transactions, ACH/ECheck transactions, total volume, and the total number of transactions for the month. These numbers will continue to increase as you process transactions throughout the month and will reset to zero at the first of each month.

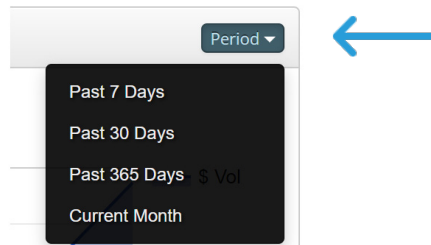
### B. Payment Trends

Immediately below the Monthly Dashboard is a Payment Trend graph, which details all payments for a given time frame. An example of the Payment Trend graph is pictured on the top of the next page.

# Dashboard Overview



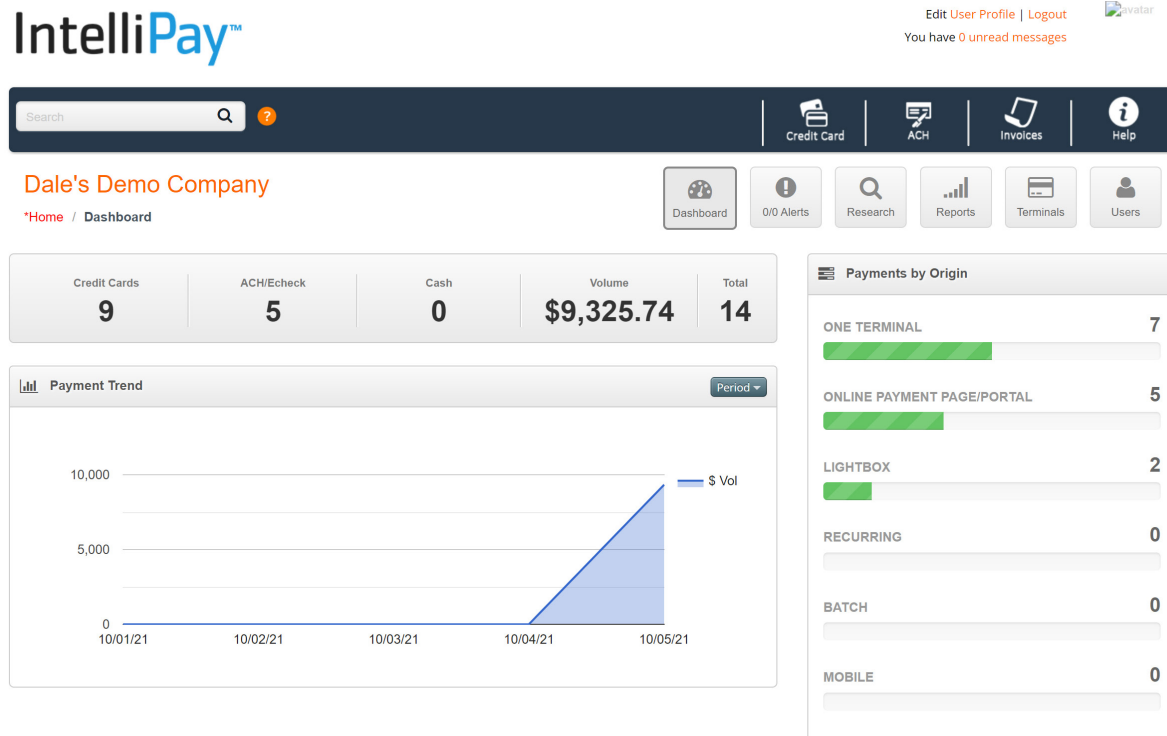
This graph allows the user to see how the company is trending over a 30-day period. The graph defaults to a monthly view; however, the user can select the “Period” button and then select “past year” or “past week” for additional trending views.



This feature is provided to help the user manage their business and see if their volume is increasing or decreasing over a specific period of time.

## C. Payment Origins

To the right of the Trend Graph, the system provides a “Payments by Origin” bar graph.

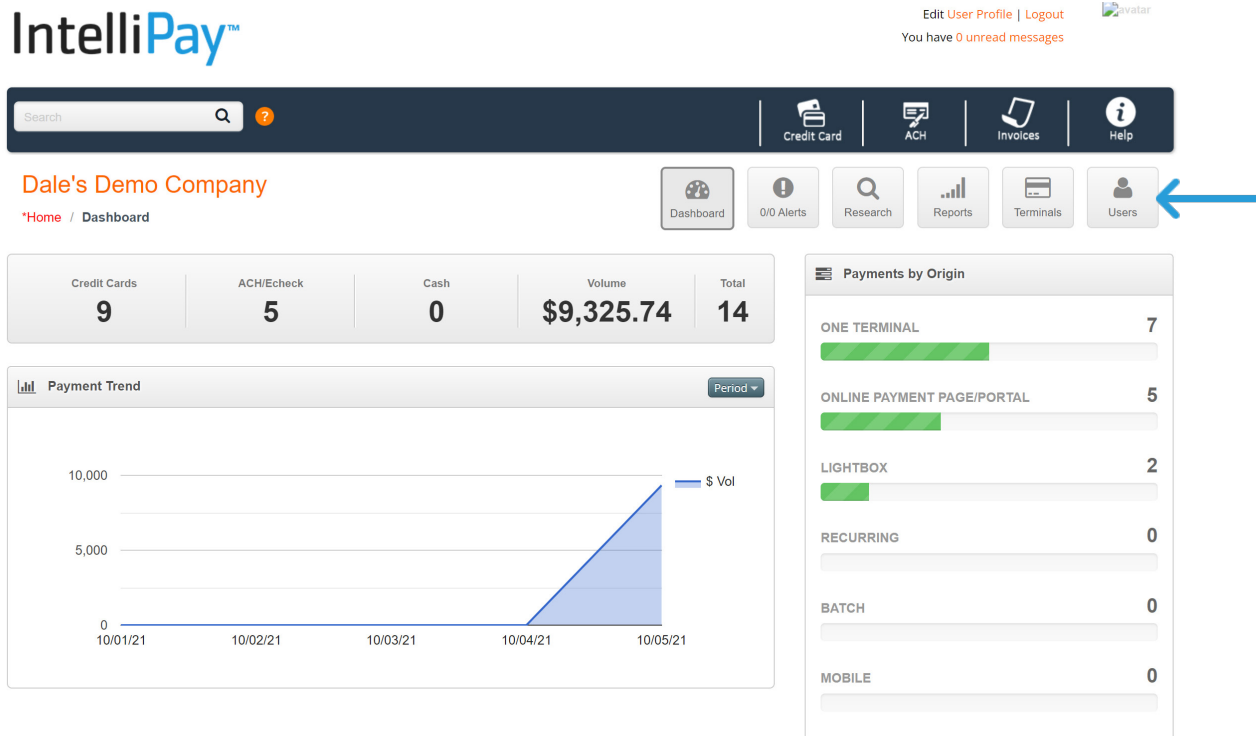


This graph tracks the payment method(s) used to process an organization's payments. As payments are processed through the system, the bar graph adds them to the totals. This graph will also reset at the beginning of the month.

# Dashboard Overview

## D. Navigation Tiles

To access the features and functionalities of the system, we have placed icons or “Navigation Tiles”.



The user-friendly tiles appear based on the user's permission to access certain functionalities of the system. For example: If a user is only allowed to access the system to process payments, they will only see the “Dashboard”, “Terminals”, and “Help” Tiles. For more information on setting up user profiles, please view the “User Setup” Document.

a. **Help Tile:** The first tile starting from the right is the “Help” Tile. When a user selects this Tile, they are taken to the “Help” section, which provides the user with user guides, videos, rules, integration guides, and other information to learn more about the payment platform.

b. **Users Tile:** This tile is only accessible by administrators. If a user does not see this tile, it is because they do not have access rights to this section of the application. In this section, the administrators can setup usernames and password for other users to access the system. For more information on this, please view the “User Setup” Document.

c. **Terminals Tile:** Users that are allowed to access this part of the system can launch the links necessary to process payments. For more information on this, please view the “Terminals” Document.

d. **Reports Tile:** Users can select this tile to view reports necessary to reconcile their accounts. For more information, please view the “Reports” Document.

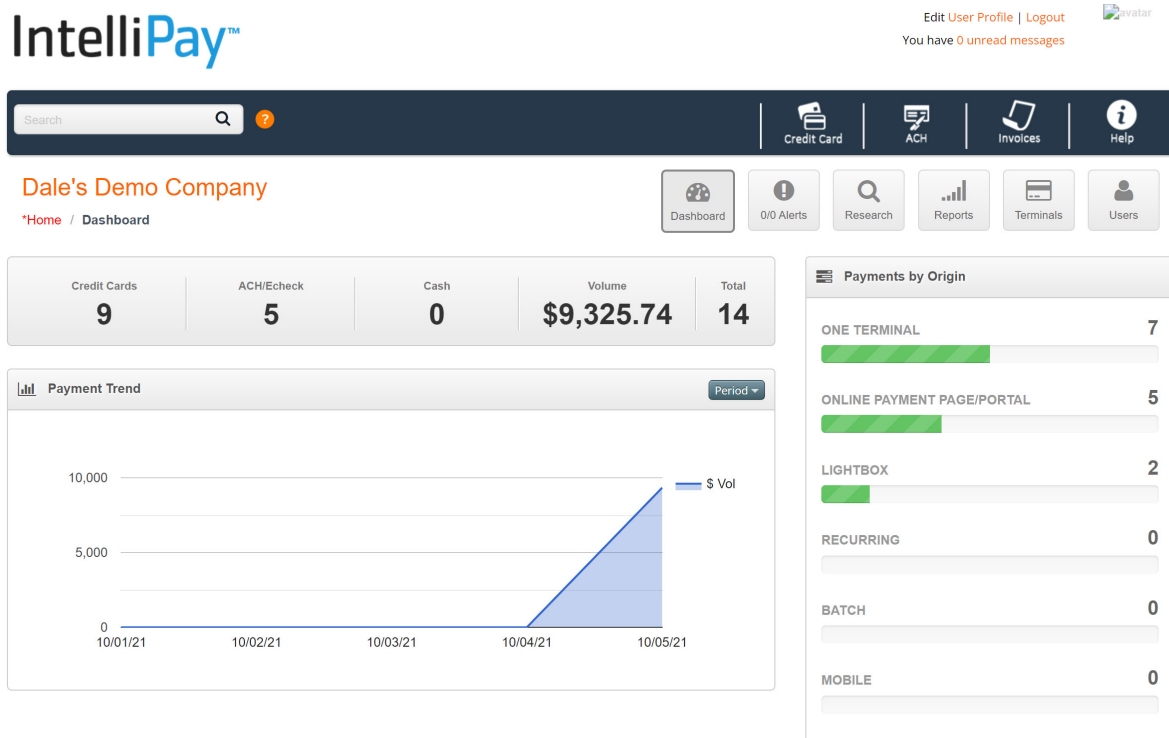
e. **Research Tile:** From time to time it is necessary to research or look up a payment or customer in the system. Users that have the correct permission can select this tile and perform the necessary research that they need to find payments, issue refunds, void payments, and look up payment history. For more information on how to research items in the system, please view the “Research” Document.

f. **Payment Alerts Tile:** Users that have access to this tile are allowed to see all payments that have failed. For example, when a customer is on a recurring payment schedule and their credit card declines or ACH payment returns as an NSF, users can select this tile to manage the failed transaction. For more information on “Payment Alerts” please view the “Payment Alerts” Document.

g. **Dashboard Tile:** Finally, there is the “Dashboard” Tile. This tile is available to all users. It allows the user to navigate back to the Home or Dashboard page after accessing any of the other tiles.

## E. Blue Navigation Bar

The blue navigation bar not only separates the function of the payment system from the user's settings, but it also informs the user of system functionalities that are configured for their business. For example: If a merchant processes credit cards, the credit card icon will appear. If the merchant processes both credit card and ACH payments, then both icons will appear.



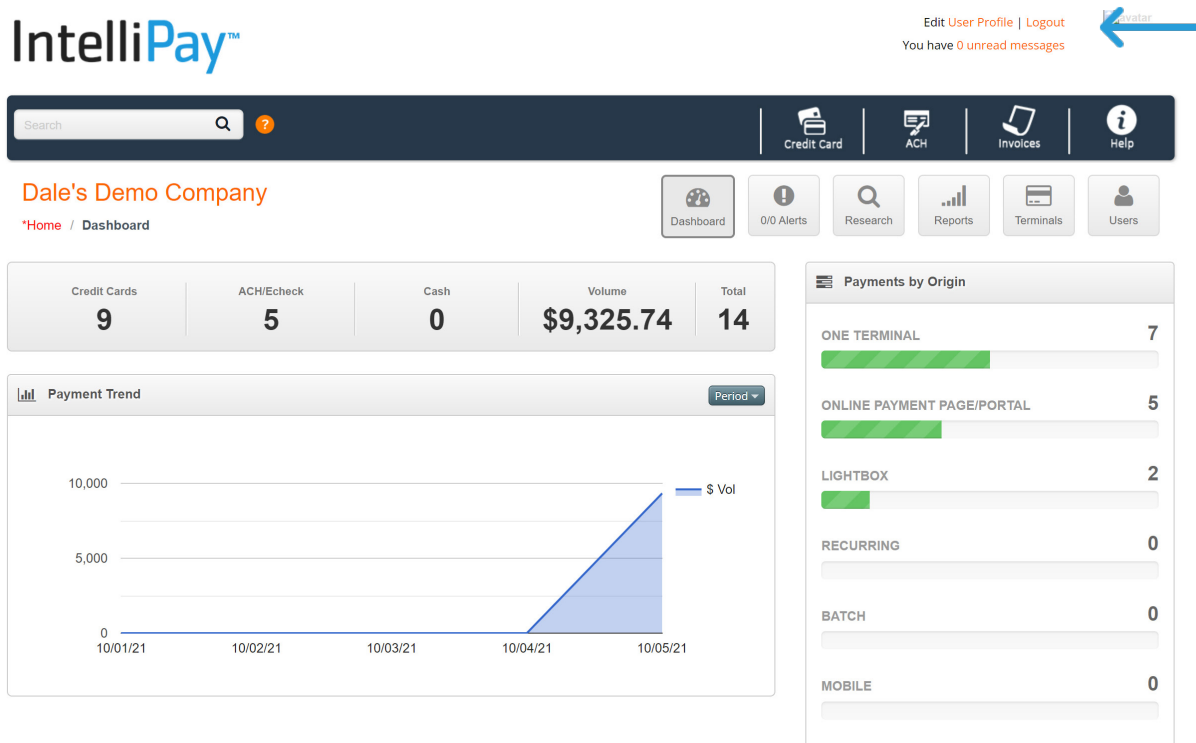
## Dashboard Overview

Additionally, if someone is setup with a “Master Login” where they can access multiple accounts from one username and password, the Master Login Icon will appear. Additional icons may appear as we partner with third party providers (see “Master Account” Section Guide).

Lastly, on the far-left section of the blue navigation bar, you will notice a search data field. Users can use this field to enter criteria for researching information inside the payment system. For example: If someone needs to research a customer’s payment history, they can type in the customer’s last name or identification number and the system will find it. Users can use this search field as a short cut verses selecting the “Research” Tile. For more information on researching customer data in our system, please read the “Research” Section Guide.

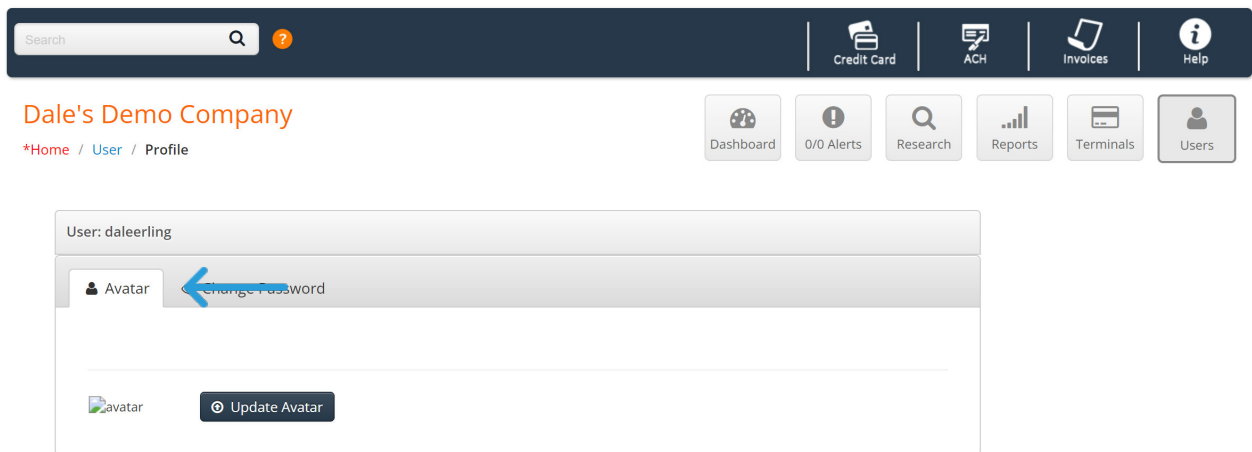
### F. User Settings



The username that you used to enter the system is located in the upper right corner of the web page.



- a. **Edit Profile:** As a user, you can select the “Edit Profile” link and upload a picture for your Avatar image and or you can change your password





Search  


Credit Card | ACH | Invoices | Help


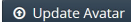
Dale's Demo Company

\*Home / User / Profile

Dashboard | 0/0 Alerts | Research | Reports | Terminals | Users

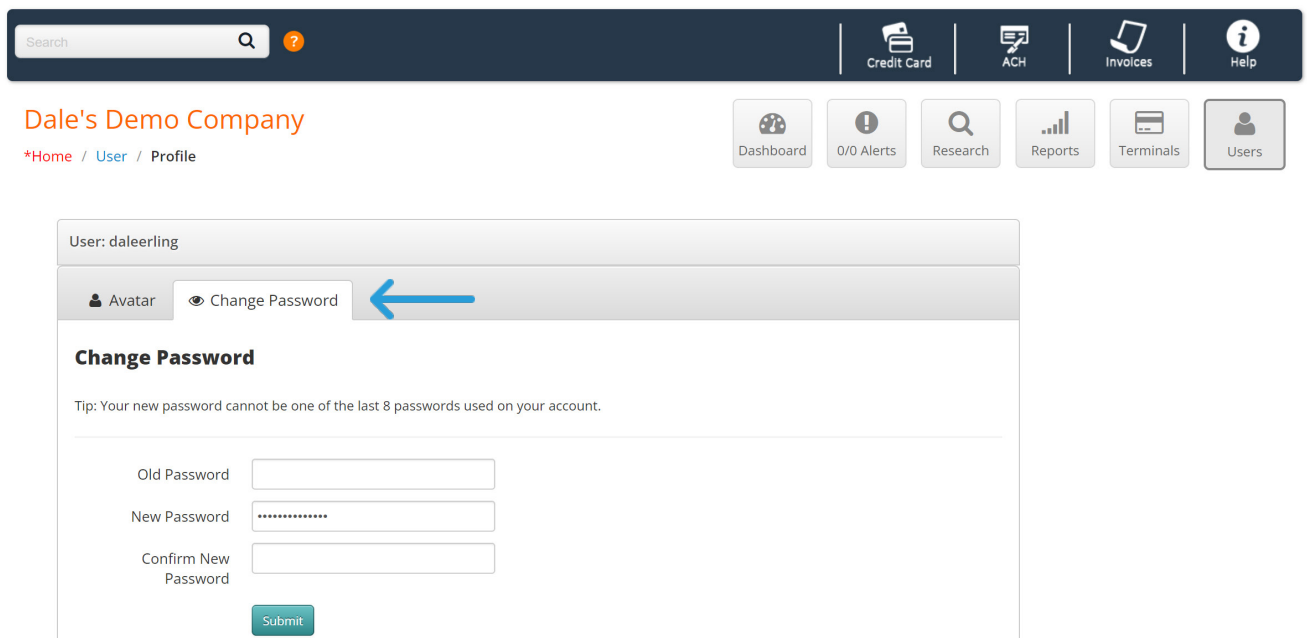
User: daleerling



Avatar  Change Password

To upload an image, please select the “browse” button to locate the image on your computer. Once you have located the image, please double click the image or click on the image and select “open” button located in the lower right corner of the directory window. Next, select the “Upload” button. This will load the image into the system and your image will now appear when you login.

## b. Change Password:



Search  


Credit Card | ACH | Invoices | Help

Dale's Demo Company

\*Home / User / Profile

Dashboard | 0/0 Alerts | Research | Reports | Terminals | Users

User: daleerling

Avatar  Change Password


**Change Password**

Tip: Your new password cannot be one of the last 8 passwords used on your account.

Old Password

New Password

Confirm New Password



You will need to enter your existing password before you create your new one.

## Dashboard Overview

**c. Unread Messages:** Below the User Profile link, there is a Message Link. From time to time, we will need to inform users about new features, product changes, and system maintenance schedules.

The system will also alert a user who has the specific user-permission, when payments are declined or returned. In these cases, the link will update to tell the user that they have one or several unread messages.

To access your unread messages, please select the unread messages link. This will take you to your “Notifications” page where you can read any unread or previous messages

IntelliPay™

Edit User Profile | Logout  
You have 0 unread messages



Credit Card | ACH | Invoices | Help

[\\*Home](#) / Notification

Dashboard | 0/0 Alerts | Research | Reports | Terminals | Users

Messages for				
Show	25	entries	Search: <input type="text"/>	
Date	Subject	Sender	Read	
2021/09/20	**PHONE SYSTEM ISSUES**	CPTeller Administrator	Unread	
2021/09/17	**PHONE SYSTEM DOWN**	CPTeller Administrator	Unread	
2021/02/15	President's Day Holiday	CPTeller Administrator	Unread	
2020/11/09	Veterans Day Holiday Hours	CPTeller Administrator	Unread	
2020/10/07	Federal Reserve Holiday Notice - Columbus Day	CPTeller Administrator	Unread	

These messages will be stored in the system for up to 2 years. You can delete the messages if you desire. There is also a “Search” feature located in the upper right corner that will allow you to search for specific messages.

## G. Log Out

To logout of the system, simply select the Logout link that is under your username and you will exit the system.













