Quick Reference Guide

1. How to login Point & Pay

✓ Save the Point&Pay Admin Web-URL in your favorites:

https://agent.pointandpay.net/pointandpay_counter/

Always use Internet Explorer. Note: Avoid upgrading to IE10. If you have IE10 you may need to use the "Compatibility Mode" option under "Tools" > "Compatibility Mode"

✓ Enter Username and Password. The password is case sensitive. The username is not.
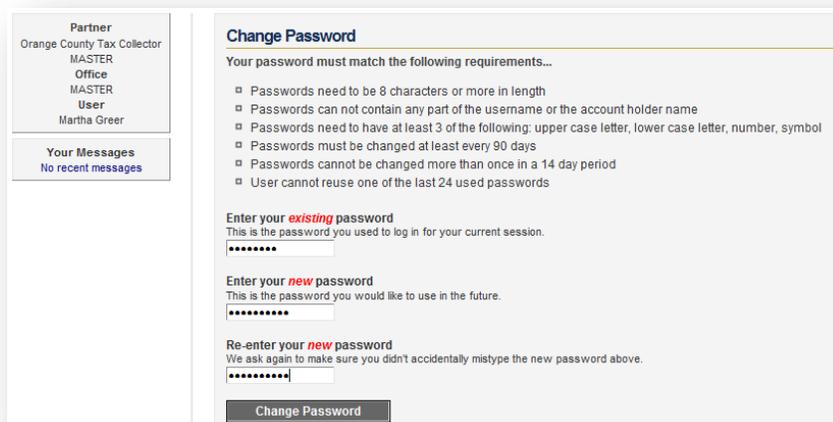✓ If you forget your password, click on the link "Forgot Password". The system will email you a new temporary password.

✓ The email with your password comes from support@pointandpay.com. If you do not receive the email within seconds, check your spam folder.
✓ If you attempt login three times using an incorrect password your account will be locked out. Ask a fellow employee with Administrator access to unlock your account or call **Point & Pay at 888-891-6064 Option 2.**

2. Changing Your Password

✓ When you receive a temporary password you will be forced to change it.
✓ Copy and Paste or type the new temporary password on the field "Enter your existing password". This is the password you just received via email or the .
✓ Enter your new password in fields "Enter new password" and "Re-Enter new password". Keep in mind the password criteria. This is an example of a good format: Pa55w0rd!
✓ You will see a message on page upon changing your password successfully.

3. Adding new Users or Assisting Existing Users
✓ Go to the menu "Editors" and click on "User Editor". The system will take you the page where you can new users or edit existing ones.
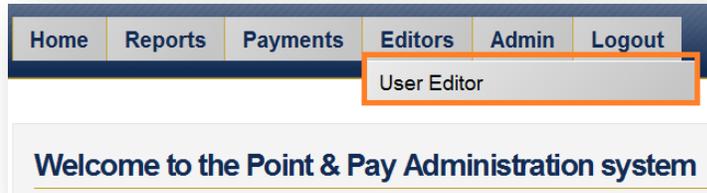
✓ To add a new user, click on "New Account", enter only the required fields on the left, check the role "Admin" and "New Payment Report". Hit "Submit". The new user will receive an email with the URL to login, username and temporary password.
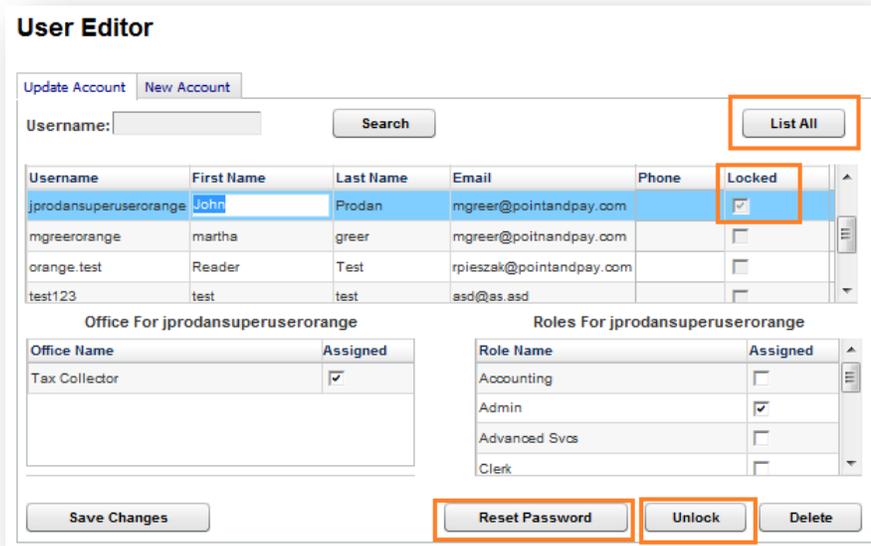
Point&Pay

✓ To help another user (reset password, unlock account), click on "List All", locate the user, click on their name. If the account is locked, click on "Unlock". If the person needs a new password, click on "Reset Password". If you make any other changes, click on "Save Changes". You can also "Delete" the user.

4. Payments: Search, Voids and Refunds
✓ Go to the menu "Payments" and click on "Search Payment".
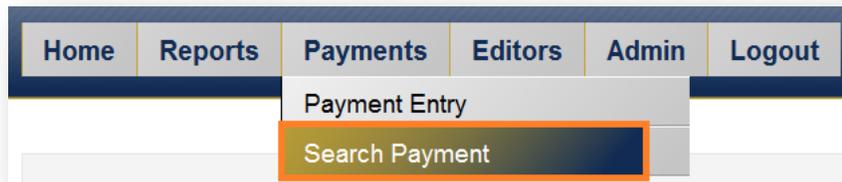
✓ You can search a payment using multiple options. The fastest way to find a payment is using the Payment ID. If you search by credit card number or by name, the system will show all payments (approved and declined) made under that criteria. You can make partial searches for "Customer Name".

✓ To view Payment Details click on the Payment ID.   The system will show all payment information available and will give you options on the left menu bar. You can void, refund a payment, view/print a receipt and enter comments about the payment. You can also email the costumer. (Example: View a Receipt, copy the text and paste it in the "Email Customer" box so you can send a copy of the

5. Voids

✓ You can Void a payment the same day it happened. This will prevent the transaction from been settled so the money will never be debited from the consumer's bank account or credit card.

✓ ▲ Note: Once a transaction is authorized, the consumer will see a "Hold" on his account. If the transaction is voided the bank will drop the hold after some days. (Up to 7 days).

✓ ▲ Note: Tax Payments are made of two transactions: One for the convenience fee and one for the tax payment amount. It happens that the convenience fee is approved by the bank but the principal payment amount is not. In that case, the consumer will see a HOLD on his account for the convenience fee only. Because the transaction will not be settled, the bank will drop the hold after some days. (Up to seven days)

✓ To void a payment, click on "Void Payment". Enter a reason for the Void.
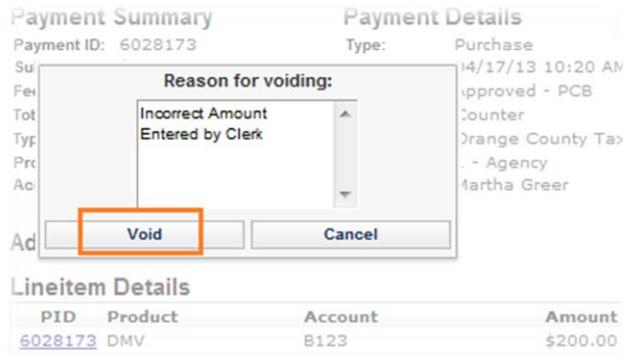
6. Refunds – Credit Cards

✓ You can Refund a credit card payment at any time, after the day it happened. Payments will be refunded in full (Fee and Payment Amount). Consumers should be the refund in their account after some days (3 to 7).

✓ No partial refunds are allowed by the system. The amount must be refunded in full. If a partial refund is needed please follow the usual internal procedures.

✓ ▲ Note: Some banks and card types (prepaid) take longer to show the refund. Consumer should discuss refund's status with the card issuer.

✓ ▲ Note: E-Checks can only be refunded by Point&Pay. For risk prevention purposes, e-checks only can be refunded seven business days after the payment date – waiting to see if the check will be paid or returned. For e-check refunds call **Point&Pay at 888-891-6064 Option 2.**
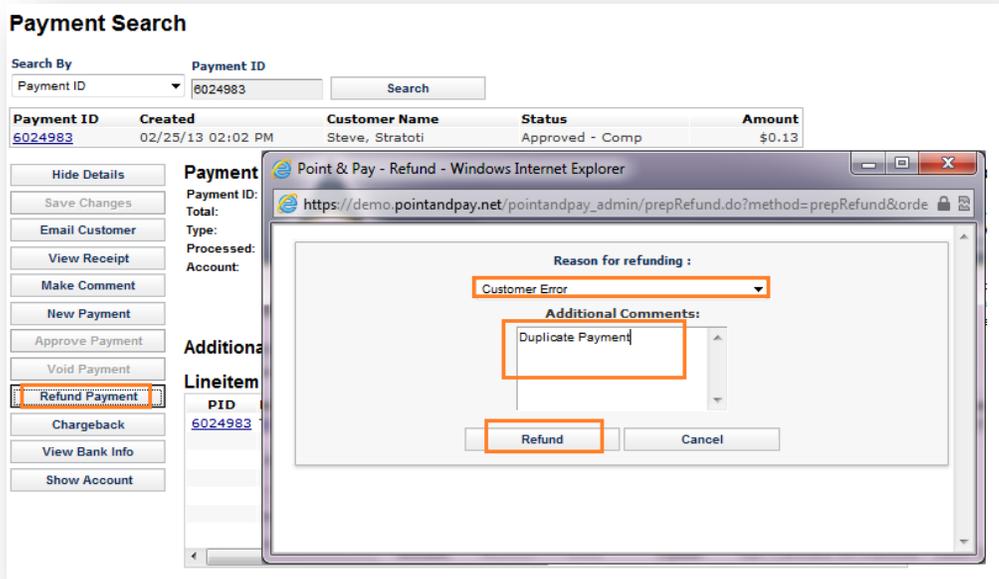
7. Reports

✓ Go to the menu "Reports" and click on "Payment Report - New".

Home	Reports	Payments	Editors	Admin	Logout
	Payment Report				
	Payment Report - New!				
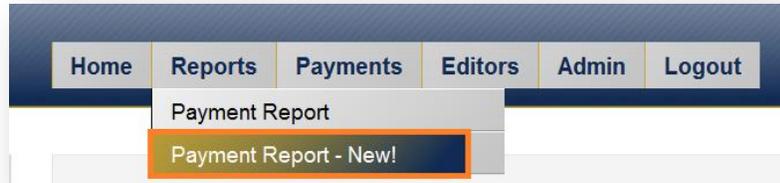
✓ The system will show by default all transactions processed "today". The report shows transactions grouped by "Channel" (Example: Web – For payments made by customers at home; Counter: For payments accepted by Clerks; IVR: for Payments made using an automated phone system).
✓ You have the ability to manipulate the report by using the search filters. Each search filter (Office, User, Product, Channel, Payment Type and Payment Method) will customize the data set that is returned via the date range search. The option "Group By", does not customize the data itself, just changes the way you view the report (Can be broken down by Channel, Product etc.).
✓ The most important thing on a report is that at the very bottom you can see a section "Deposit Summary" showing you when, and how much money your bank account will receive. Any debits will be posted right above that section so you can clearly identify debits and credits in your bank statement.

Payment Report

Start Date: Apr 17 2012 | Start Time: 12 00 AM | End Date: Apr 17 2013 | End Time: 11 59 PM
Office: No Filter | User: No Filter | Product: No Filter | Channel: No Filter | Group By: Channel | Payment Type: No Filter | Payment Method: No Filter

[Update Report] [Download to Excel] [Print Report]   Text Size: Small Medium Large

50 records found matching your search criteria.

Channel: Counter

Pay Id	Method	Type	Status	Date	Account	Product	Name	Pmt Amt
6016781	Credit or Debit Card - Visa	Purchase	Approved - Comp	08/30/2012 12:15 PM	1	Permits and Licenses	1 1	$1.00
6016782	Credit or Debit Card - Visa	Purchase	Approved - Comp	08/30/2012 12:18 PM	1	Permits and Licenses	1 1	$1.00
6018577	Credit or Debit Card - Visa	Purchase	Approved - Comp	10/10/2012 12:48 PM	test2	Permits and Licenses	Ryan Pieszak	$1.01

Total

Channel Summary	Count	Receipt	Payment	Customer Paid Fee	Partner Paid Fee	Transfer
Credit Card Payments	22	$826.76	$767.01	$59.75	$0.00	$767.01
eCheck Payments	0	$0.00	$0.00	$0.00	$0.00	$0.00
Refunds	0	$0.00	$0.00	$0.00	$0.00	$0.00
Total	22	$826.76	$767.01	$59.75	$0.00	$767.01

Channel: WEB

Pay Id	Method	Type	Status	Date	Account	Product	Name	Pmt Amt
6016767	Credit or Debit Card - Visa	Purchase	Approved - Comp	08/30/2012 10:30 AM	123	Fees	martha greer	$1.00
6016771	Credit or Debit Card - Visa	Purchase	Approved - Comp	08/30/2012 10:34 AM	123	Fees	martha greer	$12.00
6016773	Credit or Debit Card - Visa	Purchase	Approved - Comp	08/30/2012 10:37 AM	123	Fees	martha greer	$1.00

Total

Channel Summary	Count	Receipt	Payment	Customer Paid Fee	Partner Paid Fee	Transfer
Credit Card Payments	19	$1,138.75	$1,092.00	$46.75	$0.00	$1,092.00
eCheck Payments	7	$276.75	$259.00	$17.75	$0.00	$259.00
Refunds	0	$0.00	$0.00	$0.00	$0.00	$0.00
Total	26	$1,415.50	$1,351.00	$64.50	$0.00	$1,351.00

Report Totals

Total

Summary	Count	Receipt	Payment	Customer Paid Fee	Partner Paid Fee	Transfer
Credit Card Payments	41	$1,965.51	$1,859.01	$106.50	$0.00	$1,859.01
eCheck Payments	7	$276.75	$259.00	$17.75	$0.00	$259.00
Refunds	0	$0.00	$0.00	$0.00	$0.00	$0.00
Total	48	$2,242.26	$2,118.01	$124.25	$0.00	$2,118.01

Deposit Summary

Expected Deposit on 01/25/2013

	Agency Account #	Originator	Payment Method	Deposit Amount
Sample Client 2 (FL)	TBD	PNP	All	$100.00
			PNP Total:	$100.00
			Total:	$100.00

Expected Deposit on 01/29/2013

	Agency Account #	Originator	Payment Method	Deposit Amount
Sample Client 2 (FL)	TBD	PNP	All	$350.00
			PNP Total:	$350.00
			Total:	$350.00

8. Contact Point & Pay

Point&Pay
Desktop Reference Card

P&P Login:	https://agent.pointandpay.net/pointandpay_counter/home.do
Support Email:	agencysupport@pointandpay.com
Support Phone:	888-891-6064, Option 2
Support Fax:	863-248-1891
Mailing Address:	110 State St. East, Suite D, Oldsmar, FL 34751