

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.



Login information is required to access this section

Username:

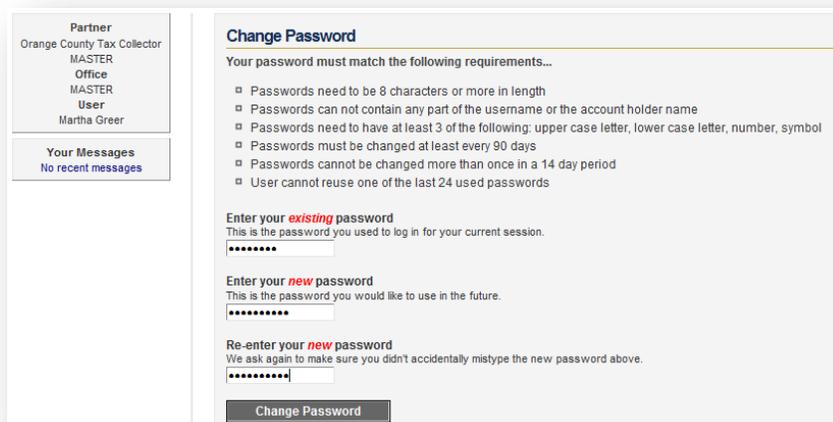
Password:

[Forgot 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.



Partner
Orange County Tax Collector
MASTER
Office
MASTER
User
Martha Greer

Your Messages
No recent messages

Change Password

Your password must match the following requirements...

- ❑ Passwords need to be 8 characters or more in length
- ❑ Passwords can not contain any part of the username or the account holder name
- ❑ Passwords need to have at least 3 of the following: upper case letter, lower case letter, number, symbol
- ❑ Passwords must be changed at least every 90 days
- ❑ Passwords cannot be changed more than once in a 14 day period
- ❑ User cannot reuse one of the last 24 used passwords

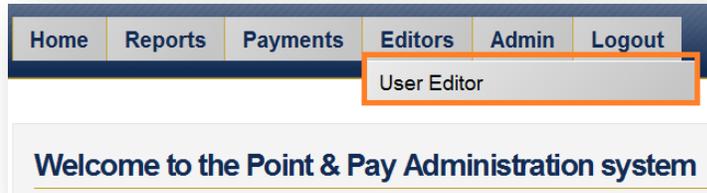
Enter your existing password
This is the password you used to log in for your current session.

Enter your new password
This is the password you would like to use in the future.

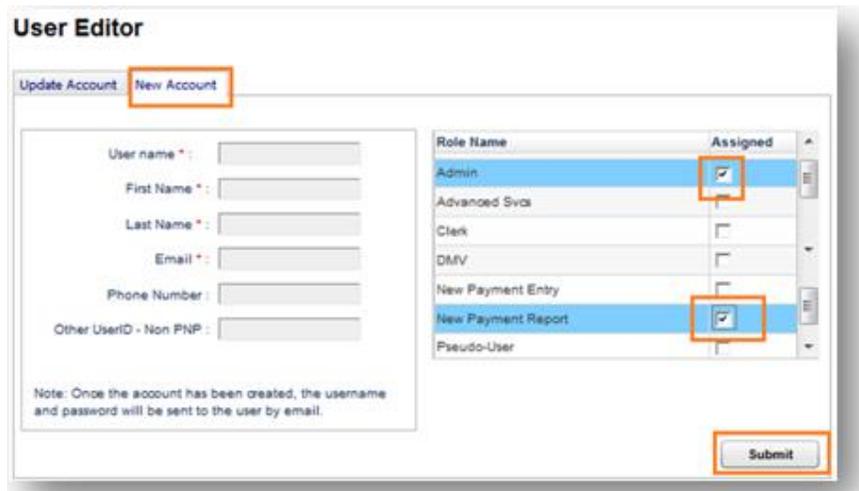
Re-enter your new password
We ask again to make sure you didn't accidentally mistype the new password above.

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.

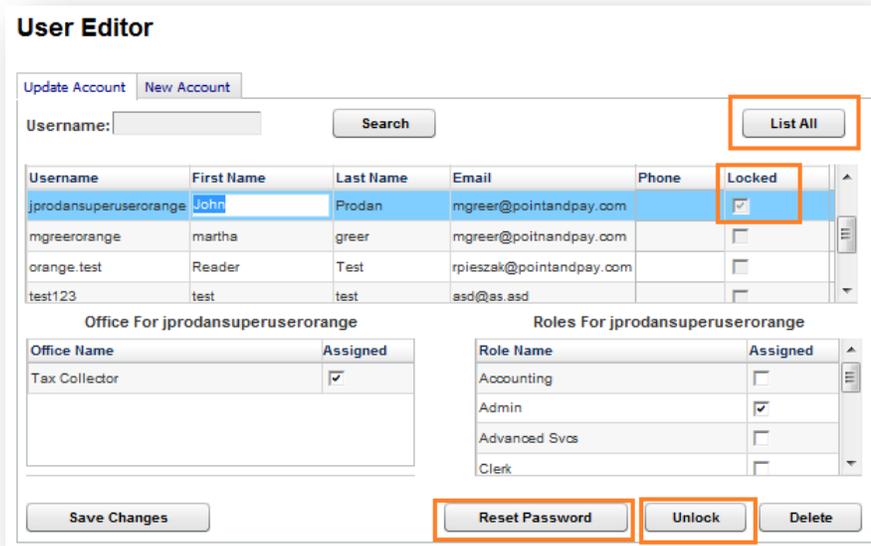


The screenshot shows the 'User Editor' form. At the top, there are two tabs: 'Update Account' and 'New Account', with 'New Account' selected. The form contains several input fields: 'User name *', 'First Name *', 'Last Name *', 'Email *', 'Phone Number', and 'Other UserID - Non PNP'. To the right, there is a table for role selection:

| Role Name | Assigned |
|--------------------|-------------------------------------|
| Admin | <input checked="" type="checkbox"/> |
| Advanced Svcs | <input type="checkbox"/> |
| Clerk | <input type="checkbox"/> |
| DMV | <input type="checkbox"/> |
| New Payment Entry | <input type="checkbox"/> |
| New Payment Report | <input checked="" type="checkbox"/> |
| Pseudo-User | <input type="checkbox"/> |

At the bottom right of the form, there is a 'Submit' button. A note at the bottom left states: 'Note: Once the account has been created, the username and password will be sent to the user by email.'

- ✓ 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.



User Editor

Update Account | New Account

Username:

| Username | First Name | Last Name | Email | Phone | Locked |
|------------------------|------------|-----------|--------------------------|-------|-------------------------------------|
| jprodansuperuserorange | John | Prodan | mgreer@pointandpay.com | | <input checked="" type="checkbox"/> |
| mgreerorange | martha | greer | mgreer@pointandpay.com | | <input type="checkbox"/> |
| orange.test | Reader | Test | rpieszak@pointandpay.com | | <input type="checkbox"/> |
| test123 | test | test | asd@as.asd | | <input type="checkbox"/> |

Office For jprodansuperuserorange

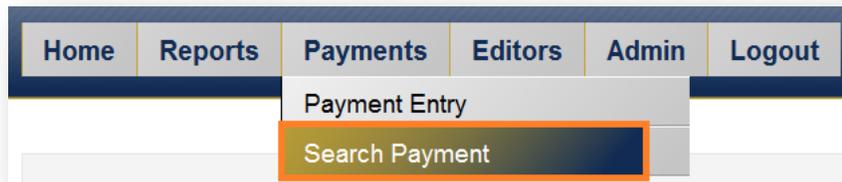
| Office Name | Assigned |
|---------------|-------------------------------------|
| Tax Collector | <input checked="" type="checkbox"/> |

Roles For jprodansuperuserorange

| Role Name | Assigned |
|---------------|-------------------------------------|
| Accounting | <input type="checkbox"/> |
| Admin | <input checked="" type="checkbox"/> |
| Advanced Svcs | <input type="checkbox"/> |
| Clerk | <input type="checkbox"/> |

4. Payments: Search, Voids and Refunds

- ✓ Go to the menu "Payments" and click on "Search Payment".



Home | Reports | **Payments** | Editors | Admin | Logout

Payment Entry

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".



Payment Search

Search By:

Payment ID
 Account Number
 Credit Card Number
 eCheck Account Number
 Total Amount
 Payment Amount
 Customer Name
 Approval Code

| First Name | Last Name | Customer Name | Status | Amount |
|-------------|-----------|---------------|----------------|----------|
| 13 10:24 AM | Jane, Doe | Jane, Doe | Approved - PCB | \$225.17 |
| 13 10:20 AM | Jane, Doe | Jane, Doe | Approved - PCB | \$204.70 |

- ✓ 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 customer. (Example: View a Receipt, copy the text and paste it in the "Email Customer" box so you can send a copy of the

Payment Search

Search By: Customer Name | First Name: jane | Last Name: doe | Search

| Payment ID | Created | Customer Name | Status | Amount |
|------------|-------------------|---------------|----------------|----------|
| 6028175 | 04/17/13 10:24 AM | Jane, Doe | Approved - PCB | \$225.17 |
| 6028173 | 04/17/13 10:20 AM | Jane, Doe | Approved - PCB | \$204.70 |

Payment Search

Search By: Customer Name | First Name: jane | Last Name: doe | Search

| Payment ID | Created | Customer Name | Status | Amount |
|------------|-------------------|---------------|----------------|----------|
| 6028173 | 04/17/13 10:20 AM | Jane, Doe | Approved - PCB | \$204.70 |

Hide Details

Save Changes

Email Customer

View Receipt

Make Comment

New Payment

Approve Payment

Void Payment

Refund Payment

Chargeback

View Bank Info

Show Account

Payment Summary

Payment ID: 6028173

Subtotal: \$200.00

Fee: \$4.70

Total: \$204.70

Type: Credit or Debit Card

Processed: Credit or Debit Card

Account: 411111****1111

Payment Details

Type: Purchase

Created: 04/17/13 10:20 AM

Status: Approved - PCB

Channel: Counter

Partner: Orange County Tax Collector DMV (FL)

Office: 1 - Agency

User: Martha Greer

Related:

Customer Details

Name: Jane Doe

Address: 236 Avenue

City/ST/Zip: Tampa FL 12345 US

Email:

Phone: 1236969896

Mobile:

Birthdate:

Comments:

Additional Details

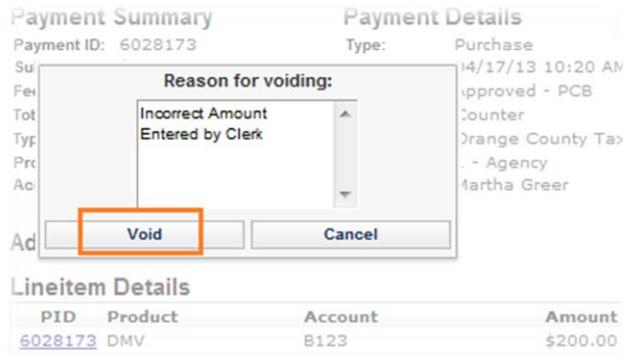
Lineitem Details

| PID | Product | Account | Amount | Fee | Additional Details |
|---------|---------|---------|----------|--------|--------------------|
| 6028173 | DMV | B123 | \$200.00 | \$4.70 | |

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5. Voids

- ✓ You can Void a payment the same day it happened. This will prevent the transaction from being 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.



Payment Summary
 Payment ID: 6028173
 Su
 Fe
 Tot
 Typ
 Prc
 Ac

Payment Details
 Type: Purchase
 14/17/13 10:20 AM
 Approved - PCB
 Counter
 Orange County Tax
 - Agency
 Martha Greer

Reason for voiding:
 Incorrect Amount Entered by Clerk

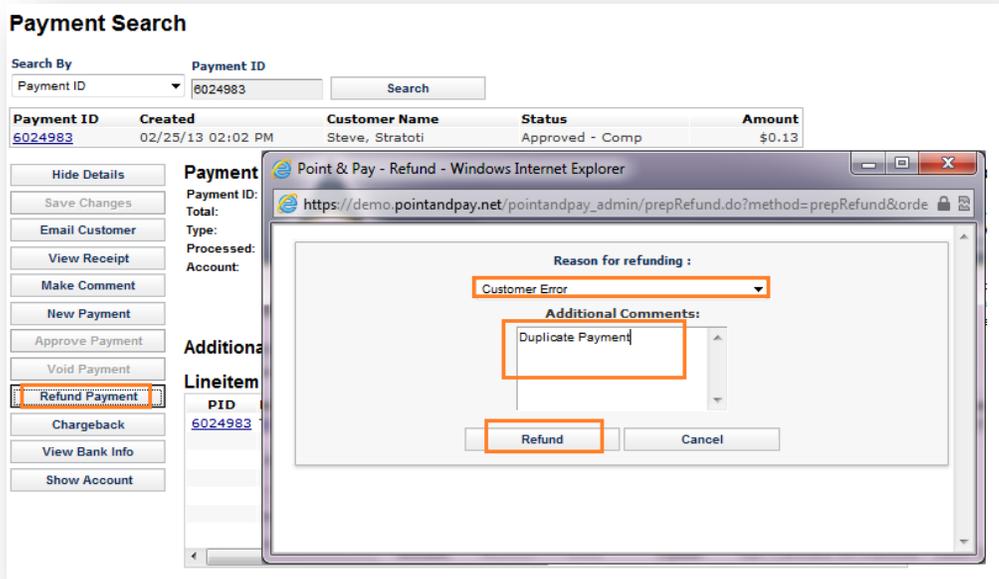
Void Cancel

Lineitem Details

| PID | Product | Account | Amount |
|---------|---------|---------|----------|
| 6028173 | DMV | B123 | \$200.00 |

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.**



Payment Search

Search By: Payment ID
 Payment ID: 6024983
 Search

| Payment ID | Created | Customer Name | Status | Amount |
|------------|-------------------|-----------------|-----------------|--------|
| 6024983 | 02/25/13 02:02 PM | Steve, Stratoti | Approved - Comp | \$0.13 |

Payment
 Payment ID: 6024983
 Total:
 Type:
 Processed:
 Account:

Additional

Lineitem

| PID | Product | Account | Amount |
|---------|---------|---------|--------|
| 6024983 | | | |

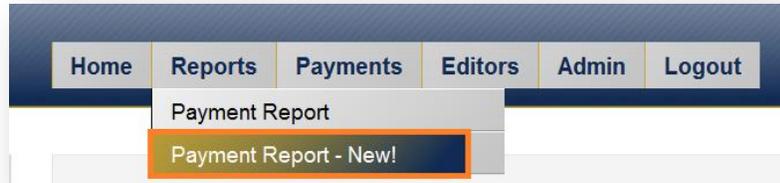
Reason for refunding:
 Customer Error

Additional Comments:
 Duplicate Payment

Refund Cancel

7. Reports

- ✓ Go to the menu "Reports" and click on "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 12:00 AM | End Date: Apr 17 2013 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

Buttons: 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 |
| 6016877 | Credit or Debit Card - Visa | Purchase | Approved - Comp | 10/10/2012 12:48 PM | 1 | 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

| 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 | \$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 | \$350.00 |
| PNP Total: | | | \$350.00 |
| Total: | | | \$350.00 |

8. Contact Point & Pay



| | |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| P&P Login: | https://agent.pointandpay.net/pointandpay_counter/home.do |
| Support Email: | agency-support@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 |