Work Samples

This document includes work samples to give an overview to the reader about the quality of the content and the writing style of the author. The document includes:

- Extracts of Bug Fixes Document
- Extracts of User Guides

Extracts of Bug Fixes Document

Version 5.20 Minor Fixes – Internal

The release notes in this section can be discussed with clients based on relevancy, but cannot be shared electronically.

Admin UI

Error Message While Making an Anonymous Payment

Users will no longer receive an error message, “The Lead Time (in days): is required” on the Review & Pay page while making an anonymous payment for an account. Earlier, when users clicked the Continue button on the Payment Entry page to make an anonymous payment, this error message displayed.

Consumer UI

Spanish Text on the Make Payment and Add Wallet pages

The correct text for Spanish field labels now displays on the Make Payment and Add Wallet pages as follows:

- When USA is the selected country, the correct Spanish text for the Account # and Routing # fields displays.
- When Canada is the selected country, the correct Spanish text for the Account #, Transit #, and Institution # fields displays.

Spanish Verbiage for “Set Default” On View Wallet page

The correct Spanish verbiage for the “Set Default” label now displays on the View Wallet page, and the label is now properly aligned.

Blank Email Notifications

After setting up or modifying an automatic payment schedule, customers will now receive an email notification in a predefined format with the correct client name in the subject line. Previously, blank email notifications were erroneously sent to customers with incorrect client names in the subject line.

Emails Triggered for Automatic Payments

After setting up an automatic payment schedule, customers will now receive only two notification emails per the system functionality: one stating that the automatic payment has been authorized and one stating that the next automatic payment transaction has been scheduled. Previously, customers received an additional email stating that the automatic payment was modified.

Extracts of User Guides

Introduction

The Administrator Portal is a multi-purpose platform designed to support the needs of a range of users within the client's organization including reseller users, client users, customer service representatives, and more. Access to the various functionalities is entirely role based. The administrator portal is equipped with extensive reporting capabilities, maximum configuration capabilities, branding, and visibility into all of the reseller's clients.

The platform supports modeling functions that can be utilized to quickly and easily implement new clients for a given market or a custom setup for those clients with more specific needs.

Payment Next is a highly configurable system; while certain features may not be selected to be activated, this document is designed to cover all functionality to provide insight into all available features.

Hierarchy

The hierarchy of Payment Next includes the Super-Client, Client, Reseller and Payment Channel. A Super-Client can have a range of one to many Clients and Payment Channels. Below are the entities that form a hierarchy in Payment Next.

- **Super-Client** — logical grouping entity of clients for payment
- **Client** — an entity which enables payment capabilities for customers, also referred to as the "Biller"
- **Payment Type** — types of payment methods — credit card, debit card, checking account or savings account for an account
- **Payment Channel** — types of payment options for how a customer wants to make a payment. In general, there are three types of payment channels; Web, IVR and Batch Payments. The web channel could sometimes be CSR web channel or customer web channel.

My Profile

The My Profile page displays user's information such as Username, Full Name, Email Address, Password, Challenge Question and Challenge Answer. A user can edit the security information and change the password on the My Profile page by using the Edit button. To edit the profile information, click **Edit** button on the My Profile page.

<Image>

To access the editing page, two challenge questions need to be answered. If the user fails to answer first two challenge questions, the next two challenge questions are presented. Once the user answers the challenge questions correctly, they can access the editing page. On the editing page, the user can change the security information and the password.

Make Anonymous Payment

To make an anonymous payment, click the Pay tab and then the details on the Enter Account Information page, and click Continue. The Account tab to make the payment displays.

<Image>

Enter the required values like payment amount and payment method details, select a payment date and click Continue to proceed to Review & Pay page.

<Image>

After reviewing the payment details on this page and agreeing to the Payment Authorization check box, click the Pay button to make the payment.

<Image>

The payment authorization message is displayed on the next screen under Account tab as shown below which confirms a successful payment. A field, “Add a note” is also available if a CSR has to make a note of any payment details and save it before clicking on Close button.

Signing In for the First Time

When a new user created by an Administrator signs in to the Administrator portal, two emails are sent to the user to their registered email address created during the new user registration process. One email has the username and another email has the temporary password. The user needs to change the temporary password immediately after signing in for the first time on the “Create your password” page by following certain rules given on the page.

<Image>

The next step is to set four unique challenge questions and answers on the “Create your challenge questions” page. Any four challenge questions could be selected from the drop-down. Some challenge questions are disabled in the drop-down to achieve the minimum six-character criteria for the answers.

SYSTEM PERFORMANCE-FAQ

What is the maximum, average and minimum response time for a web-based payment transaction?

The maximum, average, and minimum response time for a web-based payment transaction is six seconds, two seconds, and less than one second respectively. However, the duration of the real-time transaction also depends on the third party card processors.

What is the maximum, average and minimum time required to complete an IVR-based payment transaction?

The maximum, average, and minimum response time taken to complete an IVR-based payment transaction is six seconds, two seconds, and less than one second respectively. However, the duration of the real-time transaction also depends on the third party card processors.

What is the maximum, average and minimum time required to display the payment history for a customer?

The maximum, average, and minimum response time taken to display payment history for a customer is six seconds, two seconds, and less than one second respectively.

What is the maximum, average, and minimum time for a Customer Care Representative (CSR) to search a customer (by primary ID) before making a payment on behalf of a customer?

The maximum, average, and minimum time required for a CSR to search a customer by his primary ID before making a payment on a customer's behalf is six seconds, two seconds, and less than one second respectively.

What is the maximum, average, and minimum time required for a Customer Care Representative (CSR) to search a customer payment by one-year-date range?

The maximum, average, and minimum time required for a CSR to search a customer payment by one-year-date range is six seconds, two seconds, and less than one second respectively.

Introduction

The purpose of this guide is to help configure different internal and client-facing functionalities on the Administrator Portal. This guide explains different client level and reseller level configurations that could be implemented by an Administrator. It is helpful for clients and implementation teams to set up and control the behavior of certain features and functionalities of Payment Next.

Configure Clients

The Configure Clients tab allows an Administrator to configure different internal and client-facing functionalities on the Administrator Portal. It facilitates an Administrator configure different client-facing features that may or may not affect the Customer User Interface (UI) directly. It helps clients and implementation teams to set up and control the behavior of different features and functionalities of Payment Next. Configure Clients tab also allows an Administrator to set up different entities like Organizations, Resellers, Super-Clients and Clients in the application.

Accessing the Configure Clients Tab

To access CONFIGURE CLIENTS tab:

1. Open the Payment Next Administrator Portal URL, https://btat2.paybill.com/BMXNAdmin/Account/Login in the browser window
2. Type the credentials in the User Name and Password fields and click Sign in
3. Click on the CONFIGURE CLIENTS tab available on the application toolbar to access the Configure Clients page

Note: A user must have either Admin (EDSPayAdmin) or DomainAdmin role to view the Configure Clients tab on the Administrator Portal.

Configure Clients Page

The Configure Clients page is divided into two main sections, Global Client Configurations and the reseller section. The two buttons, Create New Super-Client and Create New Reseller appear on the top right corner of the page just below the menu bar. There is a drop-down box, Resellers, which allows a user to select a reseller from the drop-down list. The title of the reseller section could take the name of a reseller that is selected in the Resellers drop-down box.

Resellers

The Resellers section has a Resellers drop-down box along with two other buttons, Create New Super-Client and Create New Reseller. The Resellers drop-down box allows a user to select a reseller from the drop-down list of resellers. The default value selected is the reseller name that is associated with the user. Selecting a different reseller from the drop-down list refreshes the page and displays below all the clients and super-clients associated with that reseller. The selected reseller remains selected even if the user switches between the tabs on the Administrator portal.

Adding a New Reseller

The Create New Reseller button allows a user to add a new reseller in the system. A user with DomainAdmin role assigned can add a new reseller. To add a new reseller, follow the steps below:

1. On the Configure Clients page, click on the Create New Reseller tab to open the Add Reseller page
2. Type the name of the reseller you want to add in the Name field and any description in the Description field
3. Click Save to finish adding the new reseller
4. A message is displayed informing about successful addition of the new reseller

Editing Reseller Information

The information that is added during adding a reseller can be edited as below:

1. On the Configure Clients page, select the reseller from the Resellers drop-down box for which you wish to edit the information
2. Click on View & Edit hyperlink in front of the reseller name to open the Reseller Information page
3. Click the Edit button available in front of the Reseller Information title to edit the reseller information
4. Edit the reseller information and click Save button to save the changes.
5. Click OK on the confirmation pop-up message box to complete editing reseller information.

Adding a New Super-Client

Once you add a reseller in the system, you can add a new super-client in the system and associate it with the reseller. The Create New Super-Client button on the Configure Clients page allows a user to add a new super-client in the system.

To add a new super-client in the system, follow the steps below:

1. On the Configure Clients page, click on the Create New Super-Client button to open the Create New Super-Client page
2. Type in the super-client details in the fields provided and click Save
3. A message is displayed confirming that the new super-client has been added
4. Click on Done button to complete adding a new super-client in the system.

Adding a New Client

Once a super-client is added, a new client can be added to it. To add a new client, follow the steps below.

1. On the confirmation page of adding a new super-client, click on Add a Client button
2. The New Client Basic Setup page is displayed
3. Type in the details in the fields provided and select an appropriate business type from the drop-down list of Business Type
4. Click on Save button to complete adding a new client and view the success message on the Configuration Dashboard page

Associate a Super-Client to a Reseller

When a user creates a new super-client under a particular reseller, by default the new super-client is associated with that reseller. However, to associate super-client(s) which are not created under a particular reseller, follow the steps below. A user must have DomainAdmin capability to perform this action.

1. On the Global Clients Configuration page, click View & Edit available on the reseller title bar

2. Click the Add button on the Super-Clients title bar

3. On the Add Super-Client(s) for Reseller page, select a super-client(s) available in the list and click Add Selected button. A search box is also available to search a super-client by its name. To narrow down the list of names of super-clients or to search a particular client name using the search box, enter one or more characters of the client’s name and click Search button.