FirstPoynt Dashboard

PAllaparthi
8/26/2013 10:55:56 AM
LOGOUT

My FirstPoynt Dashboard

1a

Client Management | User Administration | Message Center | Troubleshooting Logs | Reports | Configure FirstPoynt

Client Management

2a

Client ID, Parent ID, Last Name... | All | Search | **Create New Client**

Client ID	Parent ID	First Name	Last Name	Registration Date	Mode	TandC	Status				
Clutch	ICCOhio	Javier	Mendez	8/27/2013 14:12			Active				
FiServ		Jaclyn	Worsey	8/25/2013 08:30	Test		Inactive				
FiServ		Jaclyn	Worsey	8/25/2013 08:30	Test		Inactive				
Clutch	ICCOhio	Javier	Mendez	8/27/2013 14:12			Active				
Clutch	ICCOhio	Javier	Mendez	8/27/2013 14:12			Active				

3a

1a, 1b) Primary navigation items that do not contain sub-menus link directly to an associated landing page (in this example, Client Management). Navigation items with sub-menus have no associated landing page; all functionality is contained within the sub-menu items.

2a, 2b) The ***search feature*** has been simplified and now consists of a text entry field and a single select menu to narrow the search scope to a specific field.

3a, 3b) Client management options are available via ***icons on the right side*** of the table. Their functionality is explained via ***tooltips*** that appear next to each icon as a hover state.

3c) When clicked, the ***Unlock icon*** will present the user with a ***confirmation dialog*** asking them to confirm their desire to unlock the client's account.

1b

Client Management

User Administration
- User Managment
- LOB / SIC
- Fee Type
- Address Mapping
- CVV

Message Center
- Email Templates
- SMS Templates
- Document Templates
- Send Message

Troubleshooting Logs
- Payment
- RTBP
- SMS
- IVR
- EOD Rerun
- Bill Data
- SSO
- API

Reports
- Transaction
- Miscellaneous
- Chargeback / Reject
- User Login Detail

Configure FirstPoynt
- FAQ
- User Roles & Groups
- Challenge Questions
- Configure Fees

2b

Search dropdown

All
- Client ID
- Parent ID
- First Name
- Last Name
- Registration Date
- Mode
- TandC
- Status

Icon Tooltips 3b

Unlock | Configure | Edit Account Info | Map Poynt | Delete

$

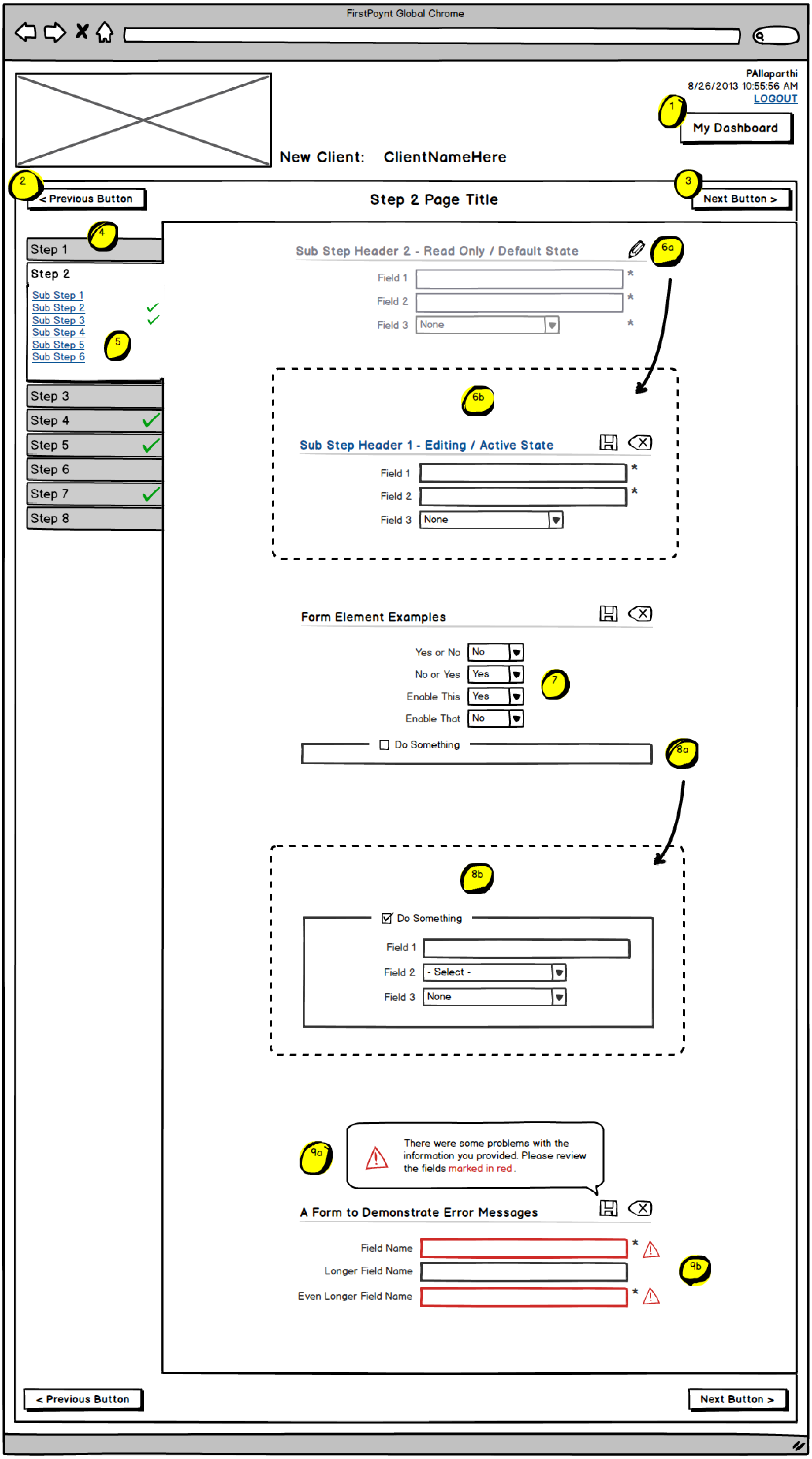
3c

Unlock Confirmation

Are you sure you want to unlock this client's account?

No | Yes

FirstPoynt Client Creation: Global Chrome



1) During the client creation walkthrough, the top nav is replaced with a single, prominent ***"My Dashboard" link*** to return users to the dashboard, reducing clutter and complexity while keeping users focused on the task at hand.

2, 3) ***"Previous" and "Next" buttons*** help move users through the major steps of client setup. There are duplicate buttons at the bottom of each page so users aren't required to scroll to the top before moving to the next step.

4) The ***left navigation*** provides direct access to all steps in the process and also serves as a progress indicator. ***Completed steps are flagged with a checkmark***, letting users know they've provided all required information for that step. It is recommended that the left navigation be made sticky (fixed to the top left of the browser viewport as the user scrolls) so users always have a sense of where they are in the process and aren't required to scroll back to the top of a lengthy page in order to navigate.

5) Each step contains multiple forms, so ***quick links*** drop the user directly to the associated form on each page. These drop links are also ***flagged with checkmarks*** when the associated forms are complete.

6a) Forms are in a ***read-only (disabled) state*** by default in order to prevent accidental changes. Clicking the "Edit" icon to the right of the form header activates the form and makes it available for editing.

6b) The "Edit" icon is replaced with a "Save" icon while editing, and ***all fields are now active***. Clicking the "Save" icon submits the form and returns it to a read-only state. There is also a "Cancel" icon to undo any changes and return the form to a read-only state. It is recommended that users be prompted with a confirmation dialog when they click "Cancel" to avoid any accidental erasures.

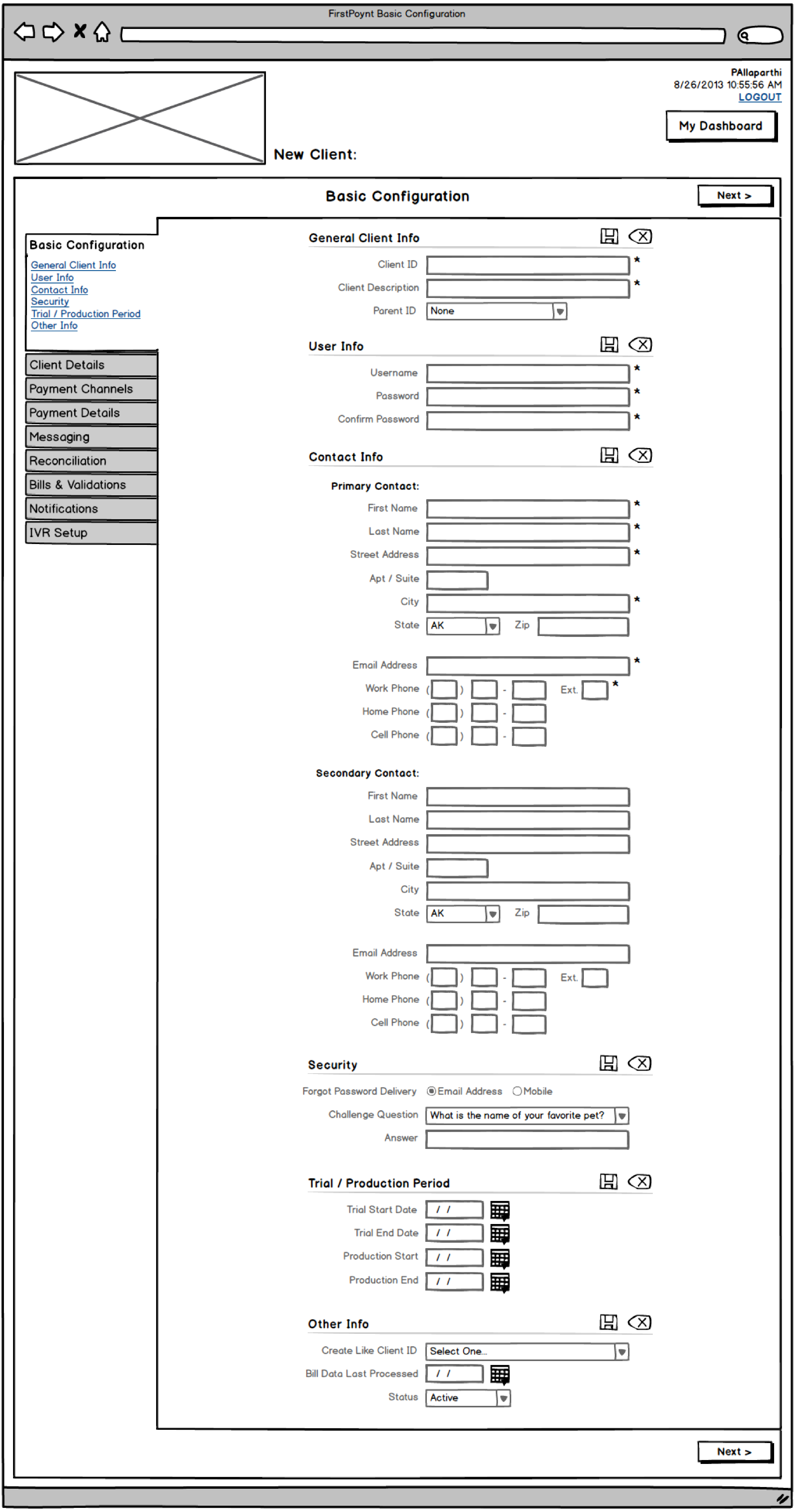
7) All ***"Yes/No" settings*** have been standardized and now use a drop-down select input, allowing easier visual scanning and tabbing through fields.

8a, 8b) Settings that require additional information act as toggles, ***showing associated fields only when selected***. These additional fields are grouped visually under the primary setting. When the primary setting isn't enabled, the group outline remains visible and serves as an indicator that additional settings are present.

9a) In the case of errors when saving changes, ***error messages*** appear immediately adjacent to the "Save" icon and above the associated form, which puts messaging directly within the user's field of view. Ideally, form validation should be performed in the client with JavaScript so the messaging is instantaneous, with appropriate server-side fallbacks should JavaScript validation fail.

9b) Fields are ***marked in red*** to indicate errors. ***Icons*** also appear to the right of each field referenced by the error message, making it clear to the user which fields require their attention.

FirstPoynt Client Creation: Basic Configuration



FirstPoynt Client Creation: Client Details

FirstPoynt Client Details

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My Dashboard

New Client:

< Previous | **Client Details** | Next >

- Basic Configuration
- **Client Details**
  - Client Details
  - Funding Model
  - Process Flow Options
- Payment Channels
- Payment Details
- Messaging
- Reconciliation
- Bills & Validations
- Notifications
- IVR Setup

Client Details

Primary Logo	[ ] Browse
Logo Alignment	Left
Client LOB/SIC Codes	None
Country	None
Language	None
Tax Payments	Yes
Split Payments	Yes
Perform MOD-10 Check	Yes
Credit Card # Check	Yes
Debit Card Only Check	Yes
Process Without CVV2	Yes
CVV Mapping	Yes
AVS Mapping	Yes
Payment Process Mode	Test

Funding Model

Model	○ Merchant ○ Consumer
Fund Fee Indicator	○ Percentage ○ Fixed Value [ ] $
Differing Payment Fees	Yes

Process Flow Options

Payment Flow	○ Single ○ Multiple
Net / Gross Option	Yes

☑ Bill Presentment

Column Identifier	
Format	- Select -
Template	None
Mapping Required	Yes
Map Name	- Select -

Disbursements	Yes

☑ Document

Identifier	
Format	- Select -
Print	Yes
Template	None
Email	Yes
Destination	None
Email Address	
Subject Value	
From Value	

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FirstPoynt Client Creation: Payment Channels

FirstPoynt Payment Channels

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My Dashboard

New Client:

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  - CSR
  - IVR
  - API
- Payment Details
- Messaging
- Reconciliation
- Bills & Validations
- Notifications
- IVR Setup

Web

1

Default Payment Method: Debit Card

☐ Credit Card

☑ Debit Card

2

STAR | NYCE | CARD | pulse

Amount:
Minimum Amount: 0
Maximum Amount: 7500.00

☐ Savings

☑ Check

Types Accepted: ☑ Personal ☑ Business

Amount:
Minimum Amount: 0
Maximum Amount: 7500.00

☑ Cash

Amount:
Minimum Amount:
Maximum Amount:

☐ Money Order

☐ Credit Letter / Memo

☐ Wire Transfer

☐ Certified Check

CSR

Default Payment Method: Credit Card

☐ Credit Card

☐ Debit Card

☐ Savings

☐ Check

☐ Cash

☐ Money Order

☐ Credit Letter / Memo

☐ Wire Transfer

☐ Certified Check

IVR

Default Payment Method:

☐ Credit Card

☐ Debit Card

☐ Savings

☐ Check

☐ Cash

☐ Money Order

☐ Credit Letter / Memo

☐ Wire Transfer

☐ Certified Check

API

Default Payment Method:

☐ Credit Card

☐ Debit Card

☐ Savings

☐ Check

☐ Cash

☐ Money Order

☐ Credit Letter / Memo

☐ Wire Transfer

☐ Certified Check

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1) The default payment method setting has been moved to the top of each associated form. Only payment options that have been enabled within each channel should appear as options in this field.

2) The checkboxes next to Credit Card and Debit Card payment options have been removed; hovering over and clicking the payment option icon now enables that option. Selected options are visually distinct from unselected options.

FirstPoynt Client Creation: Payment Details

FirstPoynt Payment Details

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My Dashboard

New Client:

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- Basic Configuration
- Client Details
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- **Payment Details**
  - General Settings
  - Payment Processor
- Messaging
- Reconciliation
- Bills & Validations
- Notifications
- IVR Setup

General Settings

Convenience Fee for Scheduled Payments: Yes

☑ Allow Multiple Payment Methods

- Allow Conv/Service Fee to be Split: Yes
- Allow Selection of Payment Method: Yes
- Default Payment Method: Credit Card
- Include Payment Methods in Remittance Data: Yes

☑ Allow Partial Payments

1

- (●) Allow amounts greater than max amount due
- ( ) Do not allow amounts greater than max amount due
- ( ) Allow amounts greater than min value and greater than max value
- ( ) Allow amounts greater than min value, but not greater than max value
- ( ) Allow amounts less than min value

☑ Set Amount Thresholds

- Minimum Amount: 50.00
- Maximum Amount: 10000.00
- Percentage or Fixed Amount: Fixed
- Set Payment Method Thresholds: Yes
- Different Thresholds at Payment Channel Level: Yes

☑ Restrict Payments

- Number of Payments Per Day: 500
- Number of Days Between Payments: 1

Store Payment Information: Yes

☑ Enable POS Capabilities

- POS Identifier: None

☑ Future Dated Payments

- Maximum Number of Days: 5

☑ Payment Tracking

- Show Last Payment Day: No
- Show Last 12 Payments: No

Payment Consolidation: Yes

Payment Processor

2

Credit Card Processor: CHASEPTECH

	Principle Fee MID	Convenience Fee MID
Credit Card Processor		
Debit Card Processor		
Check Processor		
Savings Processor		

- FTI Number:
- FirstView FTI Number:
- Company ID:

Debit Card Processor: GLOBALPAY

	Principle Fee MID	Convenience Fee MID
Processor Username		
Processor Password		

Debit Card Processor: FIRSTDATA

	Principle Fee MID	Convenience Fee MID
Merchant Number		
Terminal Numbers		

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1) The ***Partial Payments*** setting has been changed from a select field to a group of radio buttons. Long select fields containing full sentences are more difficult to scan. The new list format makes it easier to read all options and make the appropriate selection.

2) The individual payment processor forms are now attached directly to the associated payment method selections. Since this may result in duplicated forms, any updates to one form should be reflected in the same processor form elsewhere.

FirstPoynt Client Creation: Messaging

FirstPoynt Messaging

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New Client:

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  - Email Notifications
  - SMS Notifications
  - CSR Email Notifications
  - CSR SMS Notifications
- Reconciliation
- Bills & Validations
- Notifications
- IVR Setup

1 **General Settings**

From Address on Emails: info@firstpoynt.com
Show Payment Confirm Alert: Both

Email Notifications

Registration Confirmation: Both
Template: Password Reset Notification

Payment Confirmation: Client
Template: Client Payment Confirmation

Scheduled Payment Confirmation: None
Template: None

Expiration Date Alert: None
Template: None
Expiration Alert Days:
For multiple days, seperate the numbers with commas: 10,5,3,1

Payment Request: None
Template: None
Payment Request Days:
For multiple days, seperate the numbers with commas: 10,5,3,1

Payment Reminder in X Days: None
Template: None
Payment Reminder Days:
For multiple days, seperate the numbers with commas: 10,5,3,1

Recurring Payment Enabled: None
Template: None

Recurring Payment Tolerance: None
Template: None

Recurring Payment Failure: None
Template: None

Inbound Document Available: None
Template: None

SMS Notifications

Registration Confirmation: Both
Template: Password Reset Notification

Payment Confirmation: Customer
Template: Customer Payment Confirmation

Scheduled Payment Confirmation: None
Template: None

Expiration Date Alert: None
Template: None
Expiration Alert Days:
For multiple days, seperate the numbers with commas: 10,5,3,1

Payment Request: None
Template: None
Payment Request Days:
For multiple days, seperate the numbers with commas: 10,5,3,1

Payment Reminder in X Days: None
Template: None
Payment Reminder Days:
For multiple days, seperate the numbers with commas: 10,5,3,1

Recurring Payment Enabled: None
Template: None

Recurring Payment Tolerance: None
Template: None

Recurring Payment Failure: None
Template: None

Inbound Document Available: None
Template: None

CSR Email Notifications

Registration Confirmation: Both
Template: Password Reset Notification

Payment Confirmation: Customer
Template: Customer Payment Confirmation

Scheduled Payment Confirmation: None
Template: None

Recurring Payment Enabled: None
Template: None

CSR SMS Notifications

Registration Confirmation: Both
Template: Password Reset Notification

Payment Confirmation: Customer
Template: Customer Payment Confirmation

Scheduled Payment Confirmation: None
Template: None

Recurring Payment Enabled: None
Template: None

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1) The "From Address on Emails" and "Show Payment Confirm Alert" settings have been moved to the top of the page under a General Settings header to help ensure they aren't lost among the lengthy forms on this page.

FirstPoynt Client Creation: Reconciliation

FirstPoynt Reconciliation

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My Dashboard

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  - Alerts
  - Real Time Payments
  - Scheduled Payments
- Bills & Validations
- Notifications
- IVR Setup

Alerts

Alert Remittance File Availability	Yes
Template	Cycle2
Remittance File Notification Email	
Encryption Required	Yes
Algorithm	TD
SALT Key	
Send Empty Files	Yes
Concatenate Files	Yes *Include weekend and holidays into next business day's file*
Combine to Parent	Yes *One file is generated at the parent level for all children*
File Breakout	Yes *Allows Payments, Refunds, Returns, and Transfers to be broken out into individual files*
Remittance File Version	Version 1.6
Mapping Required	Yes
Map Name	Sample Map Name

☑ Transfer File via FTP

FTP Method	Push
FTP Mode	Secured-FTP
Port Number	
FirstPoynt Settings:	
FirstPoynt FTP Host/IP/URL	
FirstPoynt FTP Location	
Client Settings:	
Client FTP Host/IP/URL	
Client FTP Location	
Username	
Password	
Use SSL Certificate	Yes
Delivery/Update Method	○ File generation Execute Now ◉ Time-based 11:00
Outbound File Name	 *Use MM, DD, YYYY for date values, hh, mm, ss for time values and '*' for wildcards*

☑ Real Time Post Back Required

Return URL	
Send Void/Refunds	Yes
Send Confirmation Response	Yes
Void From Failed Post Back	Yes
Number of Attempts	
Wait Time	
Error Message on Failure	
Mapping Required	Yes
Map Name	Sample Map Name
Include Payments Scheduled Successfully	Yes
Exclude Payments of Scheduled Payments	Yes

Real Time Payments

Bypass Confirmation Page	Yes
Limit Payment Attempts	Yes
Redirection URL for Success	
Redirection URL for Failure	
Pass Billing Data on Success	Yes
Pass Billing Data on Failures	Yes
Encryption Required	Yes
Algorithm	FirstPoynt
SALT Key	

Scheduled Payments

Bypass Confirmation Page	Yes
Redirection URL for Success	
Redirection URL for Failure	
Pass Billing Data on Success	Yes
Pass Billing Data on Failures	Yes
Encryption Required	Yes
Algorithm	FirstPoynt
SALT Key	

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FirstPoynt Client Creation: Bills & Validations

FirstPoynt Bills & Validations

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- **Bills & Validations**
  - General Settings
  - Validation Details
  - Check/Savings Payments
  - Triggered Payments
  - Inbound Document Generation
- Notifications
- IVR Setup

General Settings

Bill Data Mapping Required: Yes
Map Name: Sample Map Name
Bill Information Load Email to Client: Yes
Template: Sample Template Name
Bill Data Notification Email Address:
Payment Screen Data Source: Customer Data
Verify Type: Password
Bill Information Load: SSO

Source URL:

Successful Payment:

Return URL:
Encryption Required: Yes
Algorithm: FirstPoynt
SALT Key:
Mapping Required: Yes
Map Name: Sample Map Name

Failed Payment:

Return URL:
Encryption Required: Yes
Algorithm: FirstPoynt
SALT Key:
Mapping Required: Yes
Map Name: Sample Map Name

Validation Details

Add a New Field — Validation Fields

Name	Validate Entry	User Selection	Selection Values	Edit Values	Delete
Account Number	☑	☐			
	☐	☑			

Validation Routing: Yes
Map Name: Sample Map Name
Payment Cut-Off Time: 11:00
Default Credit Card Type: VISA
Default E-Check Type: Checking
☑ Personal ☑ Business
Default OTC Type: Cash

For Check and Savings Payments:

Identification Required: Yes
DOB Required: Yes
Check Number Required: Yes

Triggered Payments

Triggered Payments: SSO

Exceptions:

Billing Entry Not Found: Yes
Triggered Amount < Expected Amount: Yes
Triggered Amount > Expected Amount: Yes
Event Not Received By Expected Date: Yes

Mapping Required: Yes
Load Email to Client: Yes
Template: Sample Map Name
Notification Email Address:

☐ Transfer File via FTP

Inbound Document Generation

Enabled: Yes
Display Only: No
Data Type: CSV
Validation Values:
For multiple values, separate with a comma. Ex. 1,2,3 or 1-5,6-7,8-15

File Delimiter:
Value Delimiter:
Multiple Files: No
Document Tracking: No

Mapping Required: Yes
Load Email to Client: Yes
Template: Sample Map Name
Notification Email Address:

Allow Email of Selected Document: Yes
Allow SMS of Selected Document: Yes

☐ Transfer File via FTP

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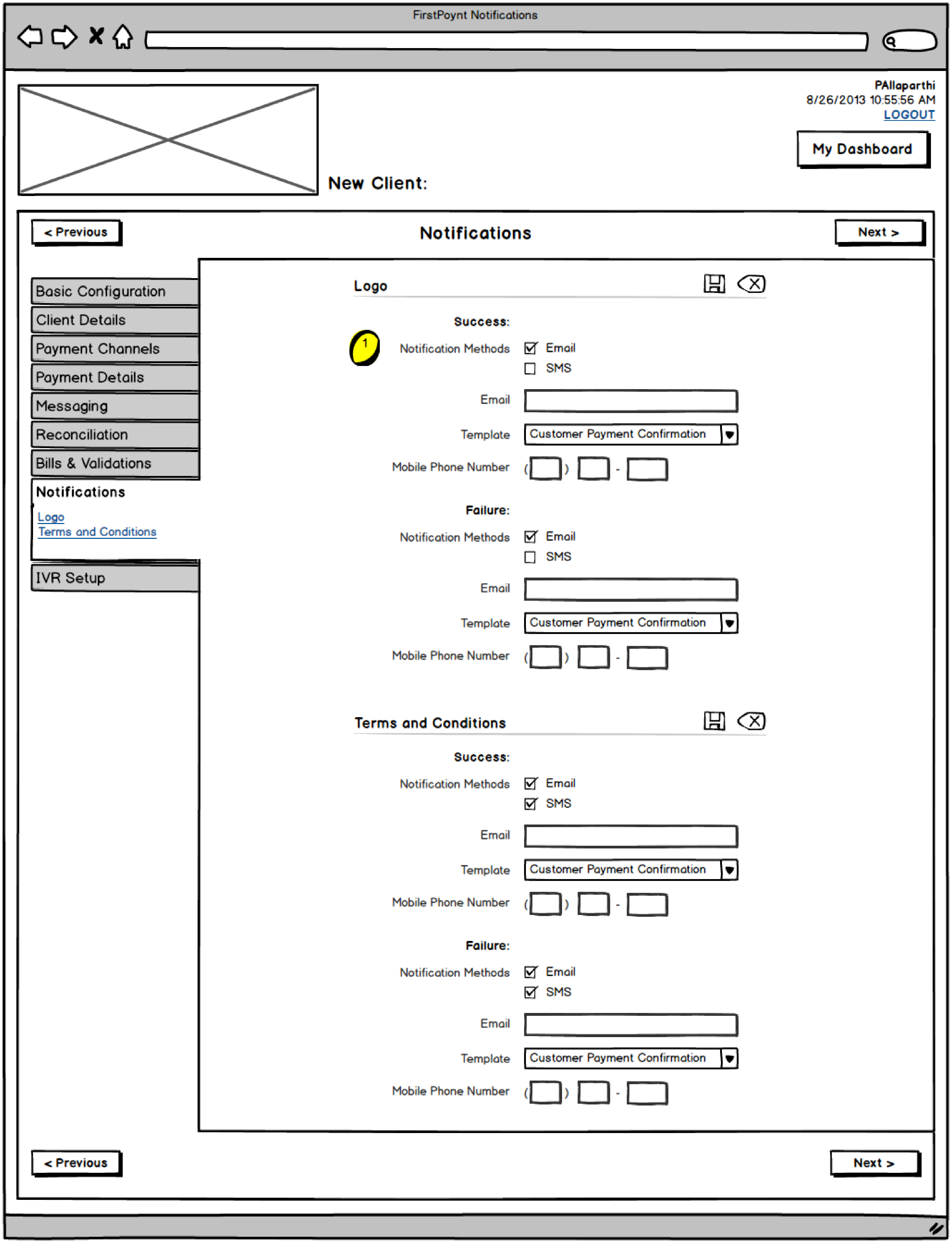
FirstPoynt Client Creation: Notifications



1) The "Notification Methods" setting has been simplified, replacing 3 radio buttons with 2 checkboxes.

FirstPoynt Client Creation: IVR Setup