



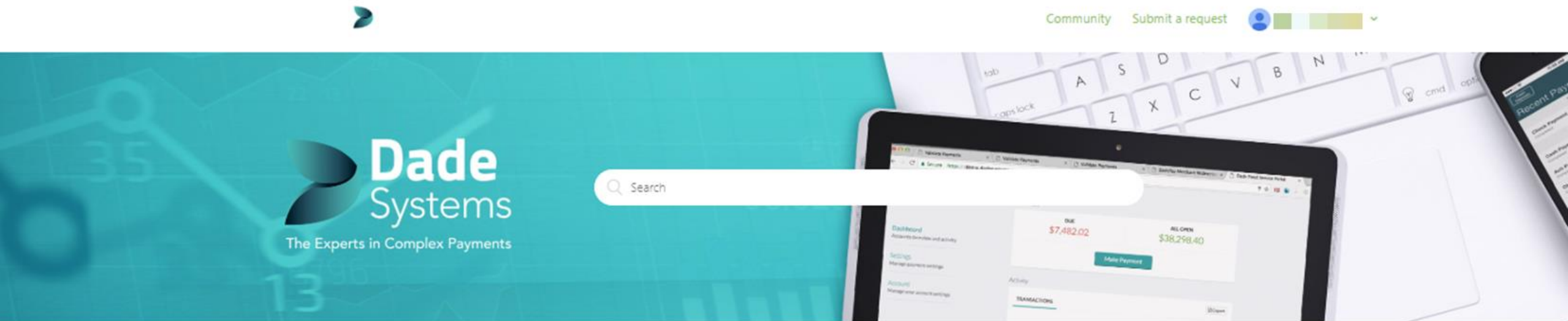
The Experts in Complex Payments

2019
**DadeSystems Support Portal
User Guide**



Portal Access

The DadeSystems Support portal provides a dedicated link for users to manage support requests and remain up-to-date on DadePay's features and enhancements.



Quick Guides

Collection of short how-to articles about DadePay functionality

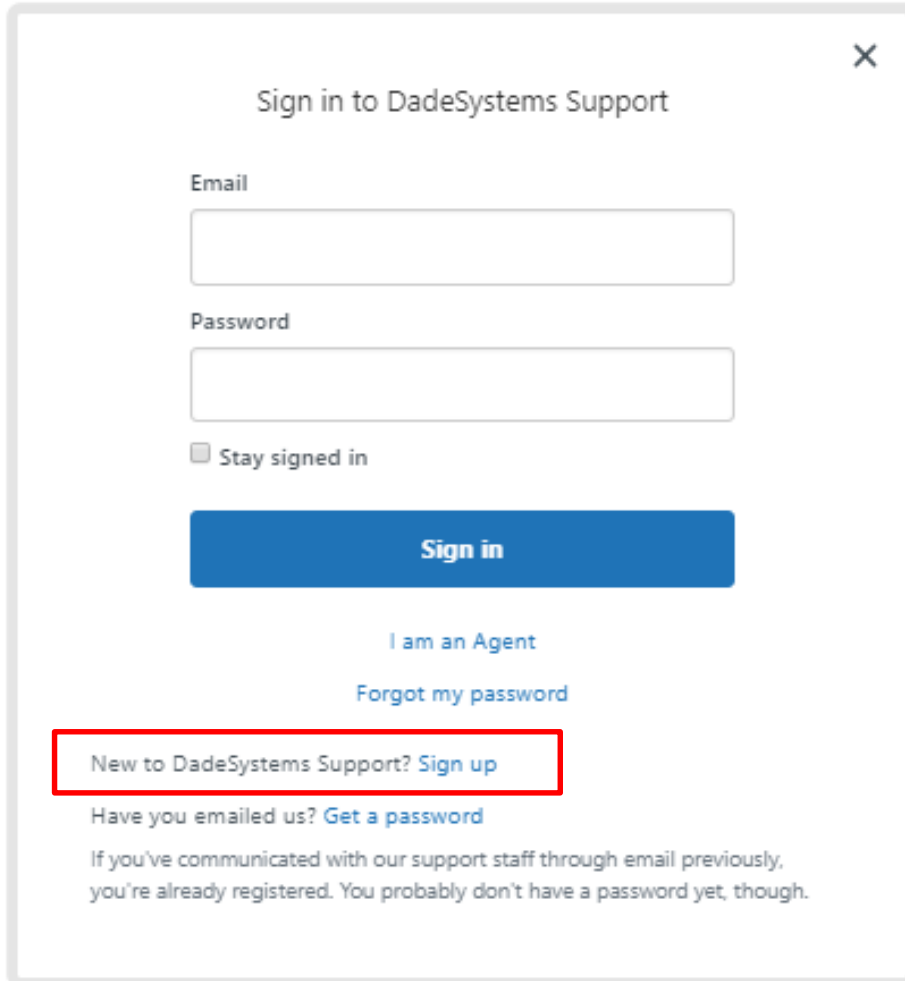
Release Notes

Learn about our latest software updates

Announcements

General information

User Login and Registration



Sign in to DadeSystems Support

Email

Password

Stay signed in

Sign in

[I am an Agent](#)

[Forgot my password](#)

New to DadeSystems Support? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

To Login as an Existing User:

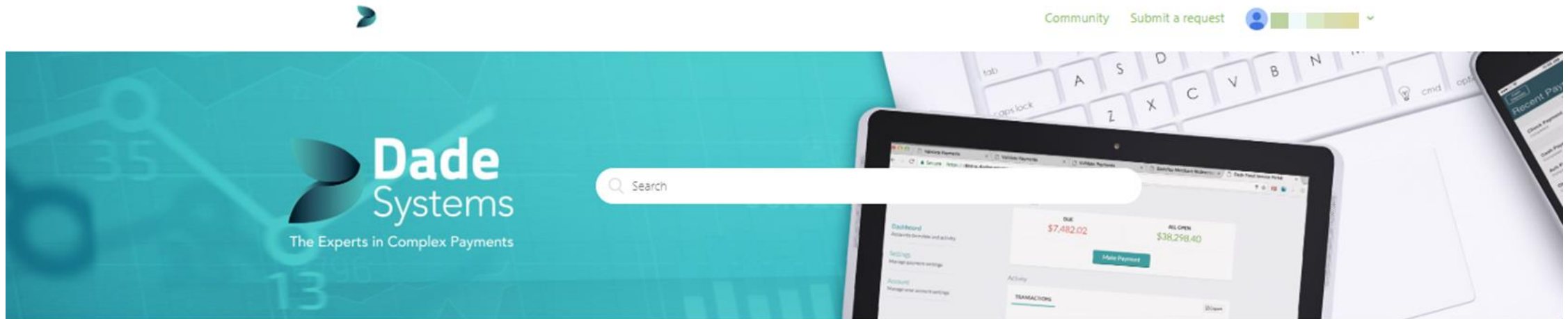
- Enter your email address and configured password and click 'Sign in'.
- If you have forgotten your password, click on the 'Forgot my password' link. We will send an email with instructions to reset your password.

To Register as a New User:

- Click on the 'New to DadeSystems Support? Sign up'
- Enter your full name and your email address.
- Your email address or email domain must be pre-authorized for site access. If you are not eligible to register, you will receive an error message that your4478 email address is not allowed to sign up for this service.

Portal Dashboard

- Your homepage provide the following access options:
 - ✓ Submit a new request or check the status of your existing requests
 - ✓ Search our knowledge base for self-service guides and information using keywords
 - ✓ View quick guides and troubleshooting guides
 - ✓ Read weekly DadePay software release notes
 - ✓ Access general DadeSystems announcements

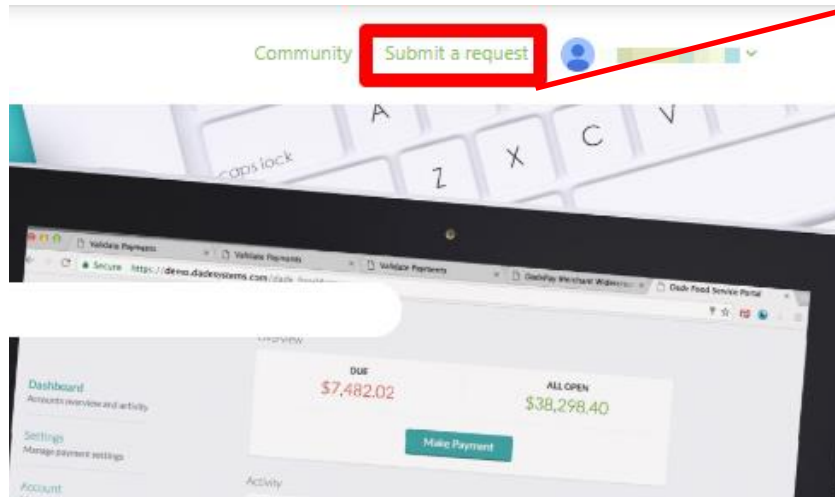


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Submit a Request



- From your dashboard, click on the 'Submit a Request' link on the top menu bar next to your login name.
- A new request form will open. Fill in each of the fields with as much detail as possible, including specific payment details, if they are available. Required fields are indicated by a red asterisk. Once finished, click on Submit.
- Once submitted, you will receive an email confirmation with your assigned ticket number.

Submit a request

CC

Add emails

Subject *

Issue Type

Please select the 'Issue Type' from the list below

Description *

Please enter the details of your request. A member of our support staff will respond as soon as possible.

Priority *

Request priority • Low = Minimal impact to end users' processes or information or enhancement request. • Normal = Interruption to end users' processes but a workaround is available. • High = Major feature of the application cannot be used with no workaround available. • Urgent = Critical issue that substantially prevents end users' user of the service with no workaround available.

Client Name

Name of corporate client

Batch ID

If payment belongs to a lockbox import file enter the Batch ID, can be found in Research / Lockbox Import

Payment ID

Can be found in 'Details' button on any payment image

Contact Information

Enter your name, email, and phone number so that we can reach you for any questions or updates.

Attachments

Add file or drop files here

Submit

Submit a Request

Submit a request

CC

Add emails

Subject *

Issue Type

-

Please select the 'Issue Type' from the list below

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Please enter the details of your request. A member of our support staff will respond as soon as possible.

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Attachments

Add file or drop files here

Submit

CC – Include email address(es) for any other user that you want to be copied on the issue request and all subsequent updates.

Subject – A brief description of your issue

Issue Type – Select an option from the drop-down that most accurately describes your issue and/or the DadePay function you were using (eg: Capture, Validation, File Transfer, etc) If none of the options match your issue, select Other and provide details in the Description box

Description – With as much detail as possible, describe your issue and/or the feature you were using when the error or problem occurred.

Priority – Select an issue severity level from the drop-down list. Descriptions for each priority level are displayed below the drop-down list.

Client Name – if you are a financial institution or multi-client processor, select the biller (client) for which you are reporting the issue.

Batch ID – If the issue is for a specific payment or batch within the DadePay application, provide the DadePay batch ID here.

Payment ID – If the issue is for a specific payment within the DadePay application, provide the DadePay payment ID here.

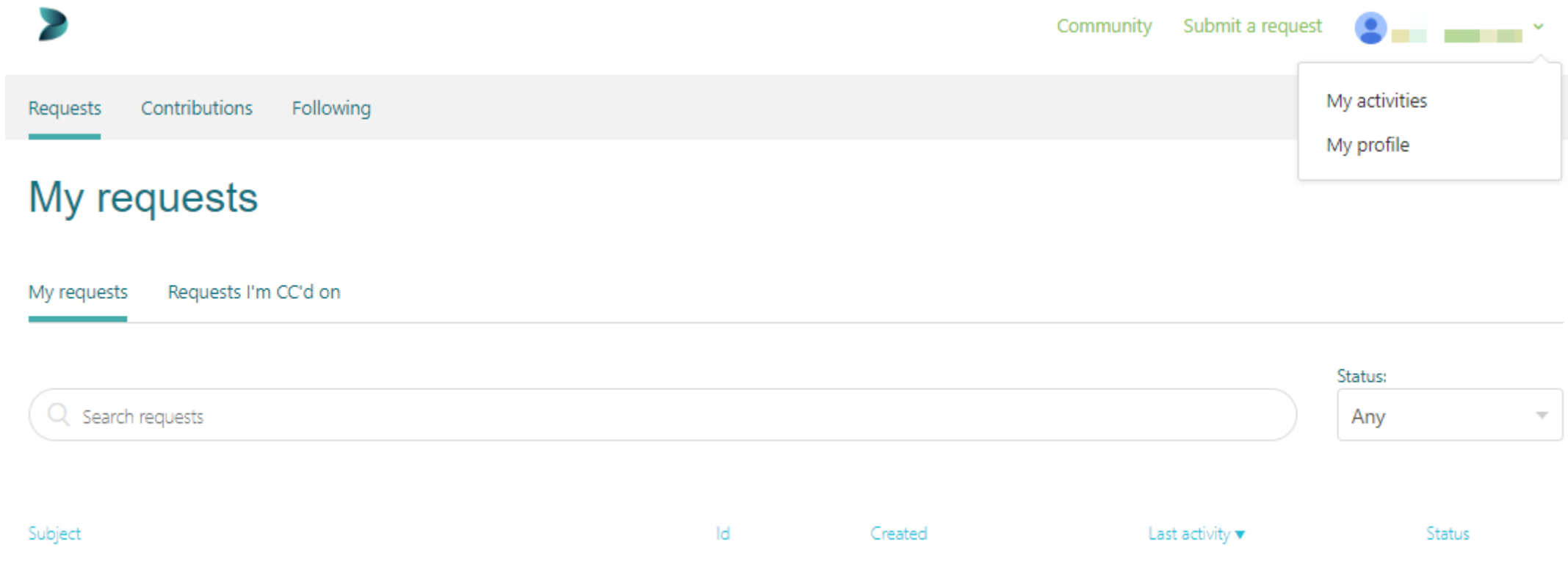
Contact Information – please include your email address and/or phone number where we can reach you should we need additional information from you.


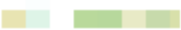
Attachments – upload any screen shots or associated images related to the problem or error.

My Activities

Open My Activities from the drop-down menu next to your Username on the main menu bar

- View all **Requests** you have opened or were CC'ed on
- View any **Contributions** you have made to articles or online discussions
- **Following** any posts or articles will allow you to be alerted when they are updated



Community Submit a request  

Requests Contributions Following

My requests

My requests Requests I'm CC'd on

Search requests

Status: Any

Subject	Id	Created	Last activity	Status
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My Activities/Requests

Requests Contributions Following


My requests

My requests Requests I'm CC'd on


Search requests Status:

Subject	Id	Created	Last activity ▼	Status
Test ticket	#923	1 minute ago	1 minute ago	open
Test ticket	#11	8 months ago	8 months ago	solved

Test ticket

 Kelly Patenaude
4 minutes ago

Test for portal user guide



Requester	Kelly Patenaude
Created	Today at 12:39
Last activity	Today at 12:39
<hr/>	
Id	#923
Status	open
Priority	Low
Issue Type	Other (if selected please add details in the issue Description)
Client Name	—
Batch ID	—
Payment ID	—
Contact Information	—
Scanner Type	—

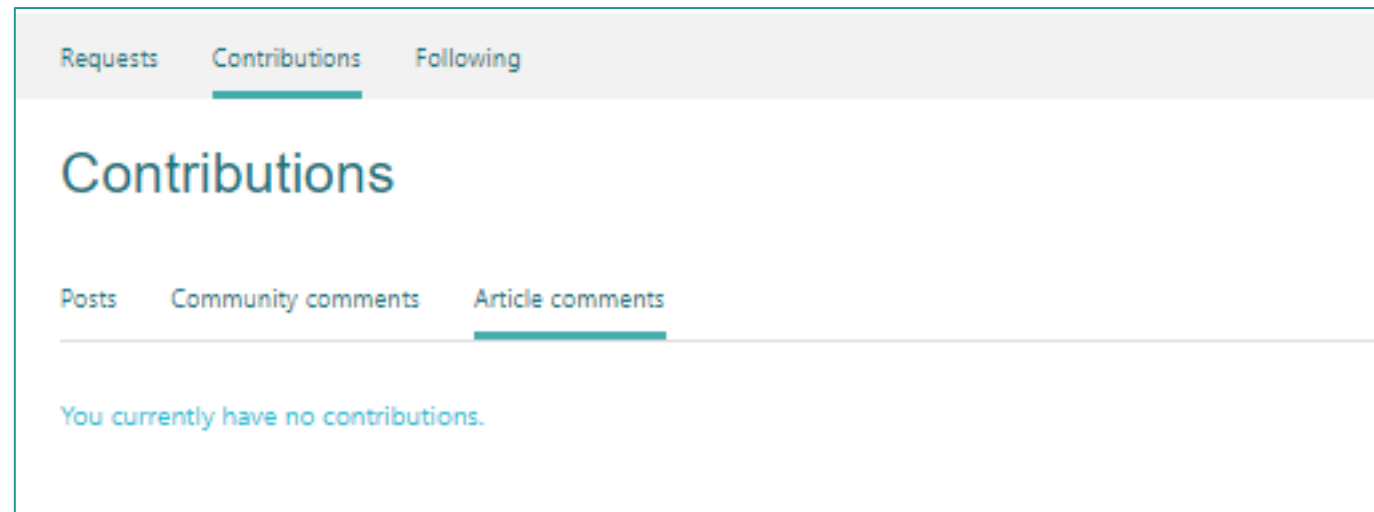
View all **Requests** you have opened or were CC'ed on

- All tickets are displayed in the results list
 - Subject
 - ID (Ticket Number)
 - When it was created
 - When it was last updated
 - Ticket Status
- Click on a ticket from the list to open the ticket details in a new window
- Add to Conversation** allows you to provide additional ticket information or request an update on open tickets.
- Create a follow-up ticket for closed items that need to be re-addressed. Scroll to the bottom of the conversation list and click on **'Create a follow-up'**

My Activities/Contributions

Post comments and/or add feedback to published articles in the DadeSystems Support portal.

- View all **Contributions**
- From the list, click on any article to which you have contributed to go directly to the selected article or document.

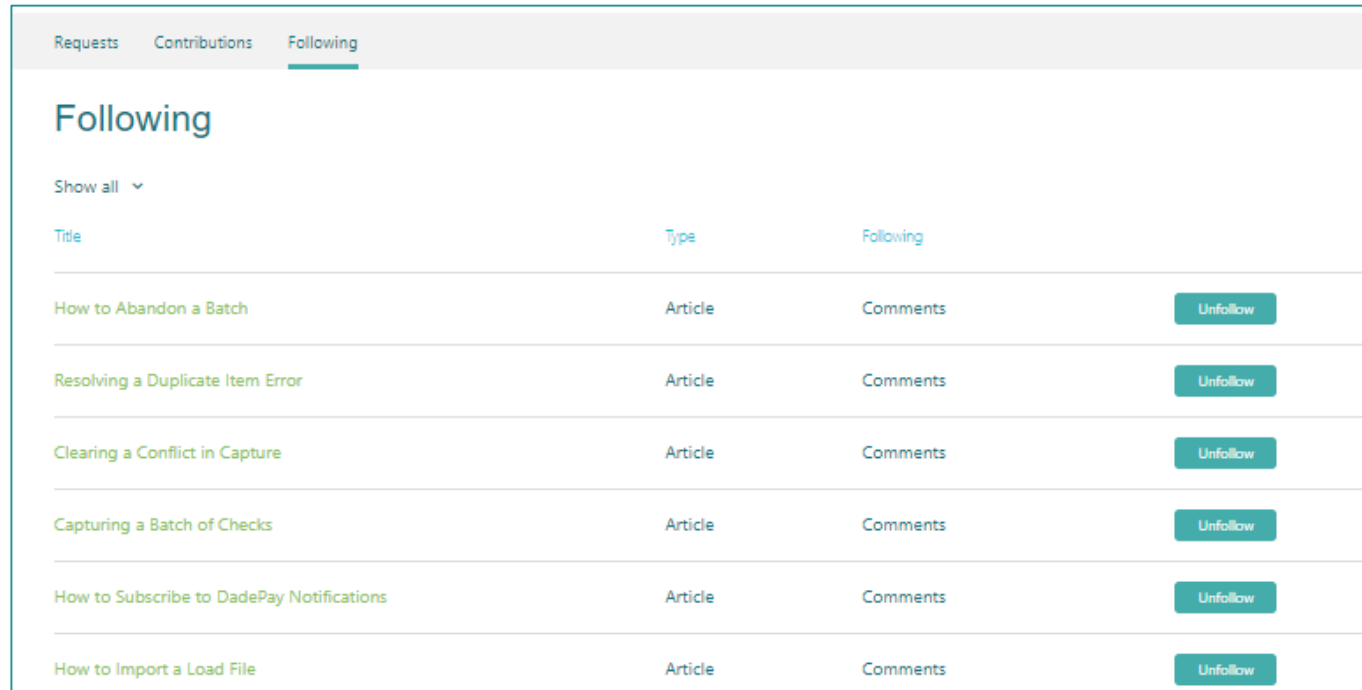


My Activities/Following

Follow any article section to be notified of new content and updates

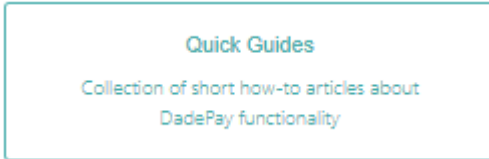
Follow any posts or articles to be alerted to new comments

- Click on the 'Follow' button from within any article to add it to your list of followed items
- View a list of all articles you are following
- Click on the article link to open the selected article
- Click on the 'Unfollow' button to remove the article from your list



Title	Type	Following	
How to Abandon a Batch	Article	Comments	<button>Unfollow</button>
Resolving a Duplicate Item Error	Article	Comments	<button>Unfollow</button>
Clearing a Conflict in Capture	Article	Comments	<button>Unfollow</button>
Capturing a Batch of Checks	Article	Comments	<button>Unfollow</button>
How to Subscribe to DadePay Notifications	Article	Comments	<button>Unfollow</button>
How to Import a Load File	Article	Comments	<button>Unfollow</button>

Quick Guides



Quick Guides are short ‘how-to’ articles that each explain a different feature or process within DadePay

- Click on the Quick Guide tile from your main dashboard and then select any of the available articles OR search using keywords (eg: capture, conflict, subscribe, install, etc)
- 1 – Search for other articles
- 2 - Follow/Unfollow the selected article
- 3 – See other related articles in this Quick Guide section
- 4 – Vote on the article
- 5 – See your other recently view articles
- 6 – Contribute a comment to the selected article

DadeSystems Help Center > Quick Guides > Load

Articles in this section

- How to Download and View a Load File
- How to Import a Load File

How to Download and View a Load File

1 Search

2 Follow

3 How to Import a Load File

4 Was this article helpful?

5 Recently viewed articles

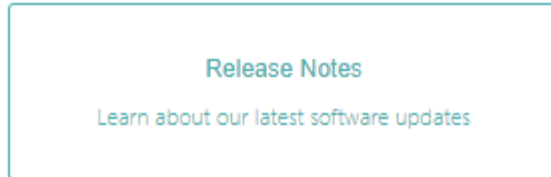
- Remove Funds & Advice
- How to Subscribe to DadePay Notifications
- How to Un-release a Batch
- Clearing a Conflict in Capture
- Welcome to Our New Support Help Center!

6 Comments

0 comments

Be the first to write a comment.

Release Notes



Release Notes provides details regarding the features and enhancements included in our software updates

- Click on the Release Notes tile from your main dashboard and then open the DadePay Release Notes list
- Each update includes
 - DadePay release version number
 - Version release date
 - List of enhancements included in the release
- Follow the Release Notes article to be notified of each update to the document

Articles in this section

Release Notes

Release Notes



Pilar Rodriguez
7 months ago · Updated

Follow

DadePay v4.2.2.0

July 13, 2018

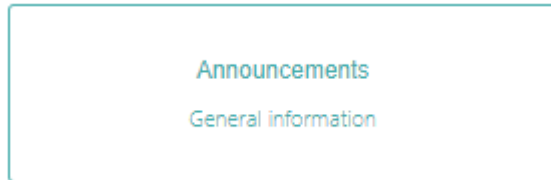
- Added auto validation logic for Bill Payment files
- Added the ability filter RDC and Lockbox into separate core post files
- Updated invalid user login message on portal
- Added the ability to approve ECA advices that have been verified/edited by a user

DadePay v4.2.1.13

July 9, 2018

- Add ability to resize landing page logo on the portal

Announcements



Announcements include general DadeSystems information and updates that are not exclusively related to DadePay support.

- Click on the Announcements tile from your main dashboard to see a list of articles and posts.
- Follow any selected article to be notified of each update to the document

Articles in this section

Welcome to Our New Support Help Center!



Kelly Patenaude

8 months ago · Updated

Follow

Welcome to Our New Support Help Center!

You're looking at DadeSystems' new Help Center and self service support portal.

This Help Center is designed to provide you a complete self-service support option. The Help Center is made up of two parts: a self service guide and a ticketing portal. You can search our quick guides for easy answers to your DadePay functionality questions.

To submit a request click on the **Submit a request** link on the top of the portal.



Was this article helpful?

Yes No

0 out of 0 found this helpful