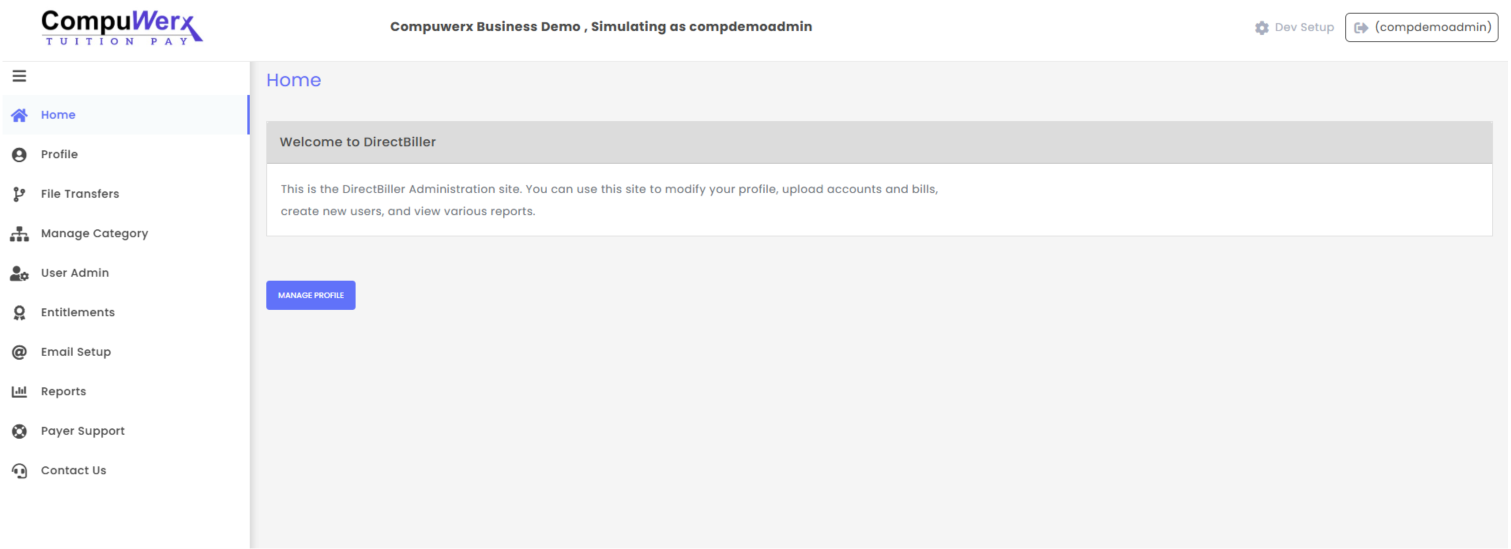
COMPUWERX – ADMIN DEMO SITE

JANUARY 2025

ADMIN SITE

HOME - ADMIN LANDING PAGE

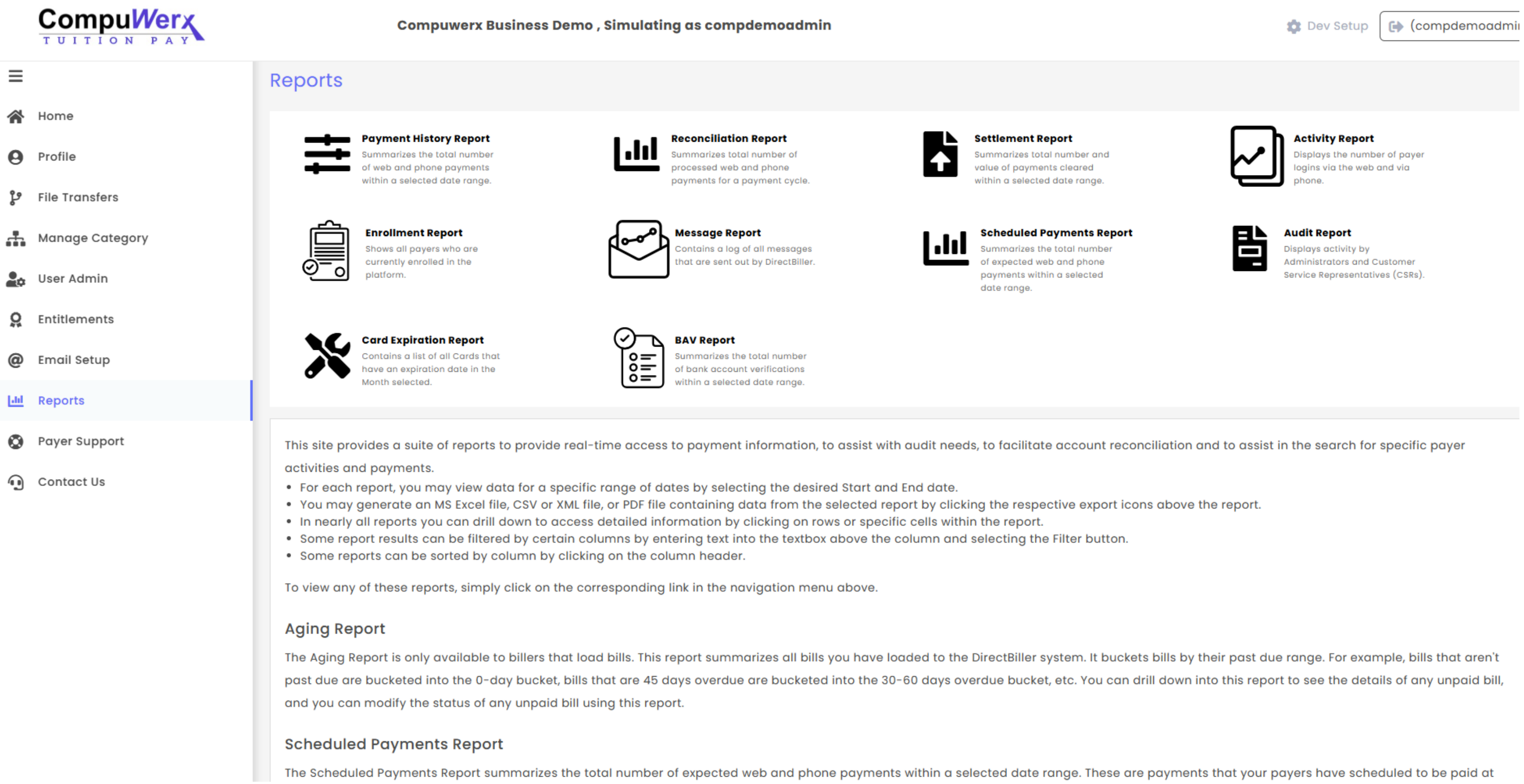
- Admin first lands on the Home page with different tabs on the left depending upon their level of access.



ADMIN SITE

REPORTS

- Admin navigates to Reports.
- For most reports, you may view data for a specific range of dates by selecting the desired Start and End date.
- In nearly all reports you can drill down to access detailed information by clicking on rows or specific cells within the report.



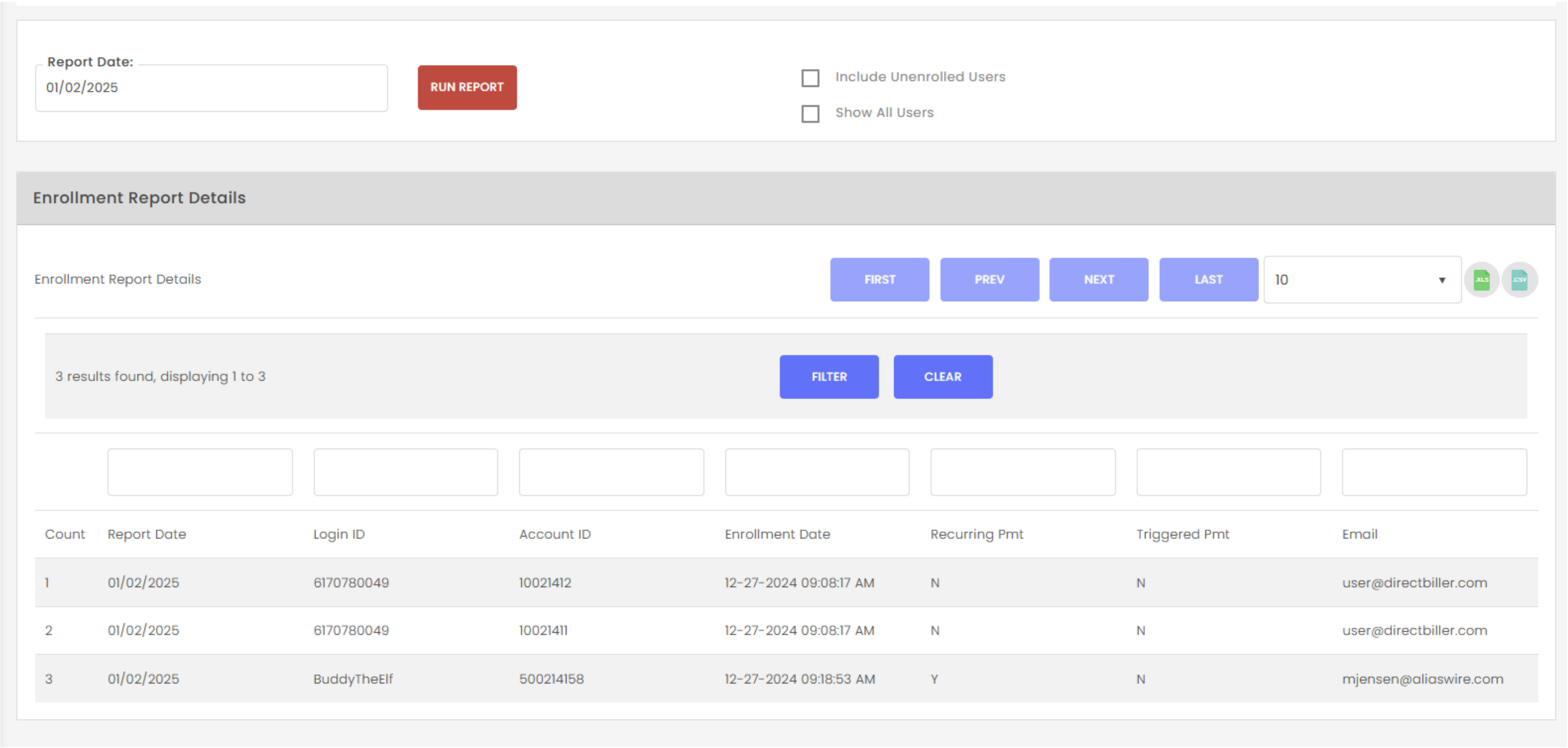
ADMIN SITE

REPORTS – ENROLLMENT REPORT

- Admin selects Enrollment Report and presses the Run Support button.

- All enrolled payers are then populated in the report. Enrolled payers have registered and created their own Username and Password.

- Report displays 3 enrolled users.



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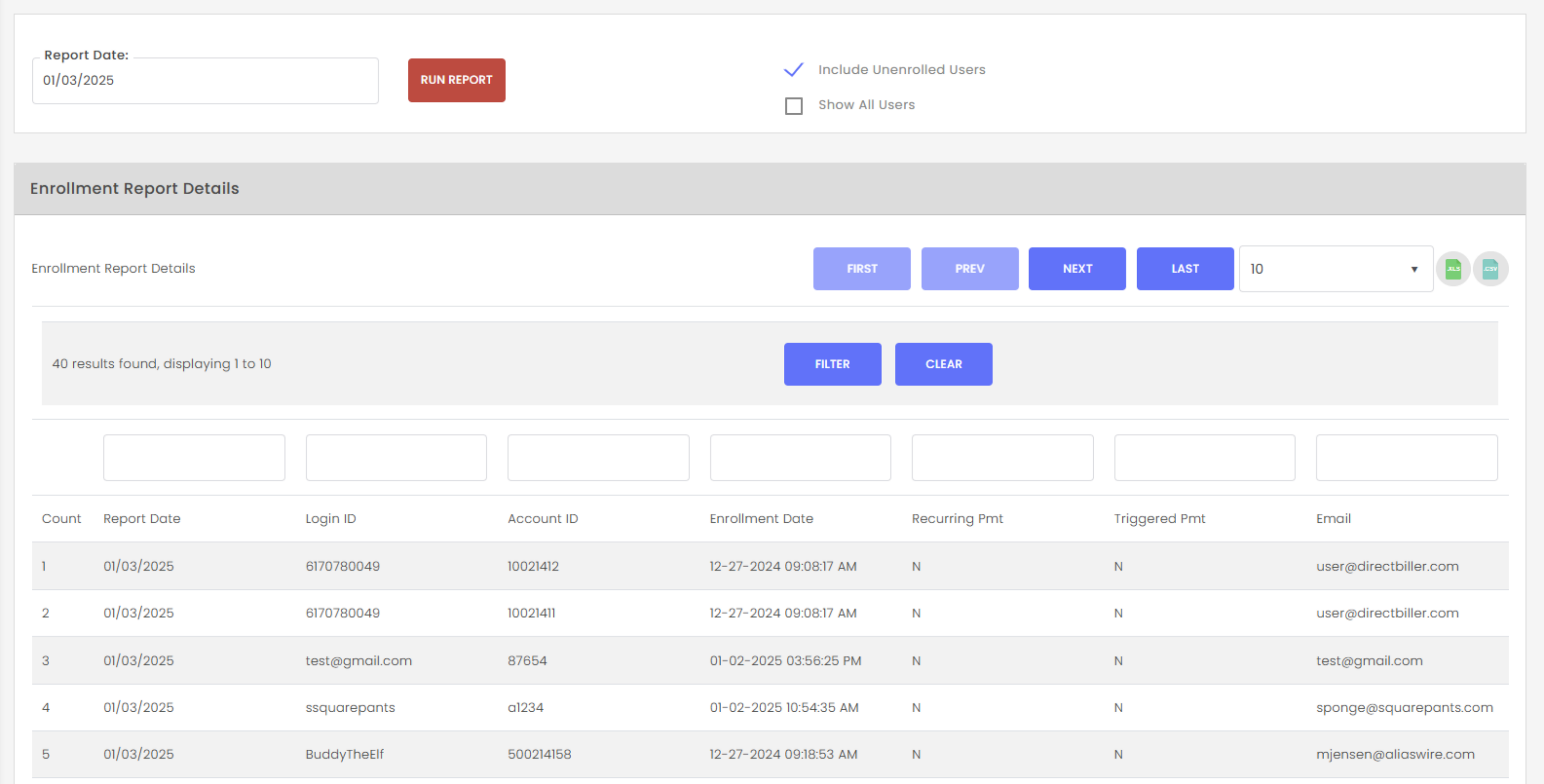
REPORTS – ENROLLMENT REPORT – INCLUDE UNENROLLED

- Admin selects ‘Include Unenrolled Users’ checkbox.
- All payers who have accessed the site or have been uploaded populate in the report.
- Reports displays 40 enrolled and unenrolled users.



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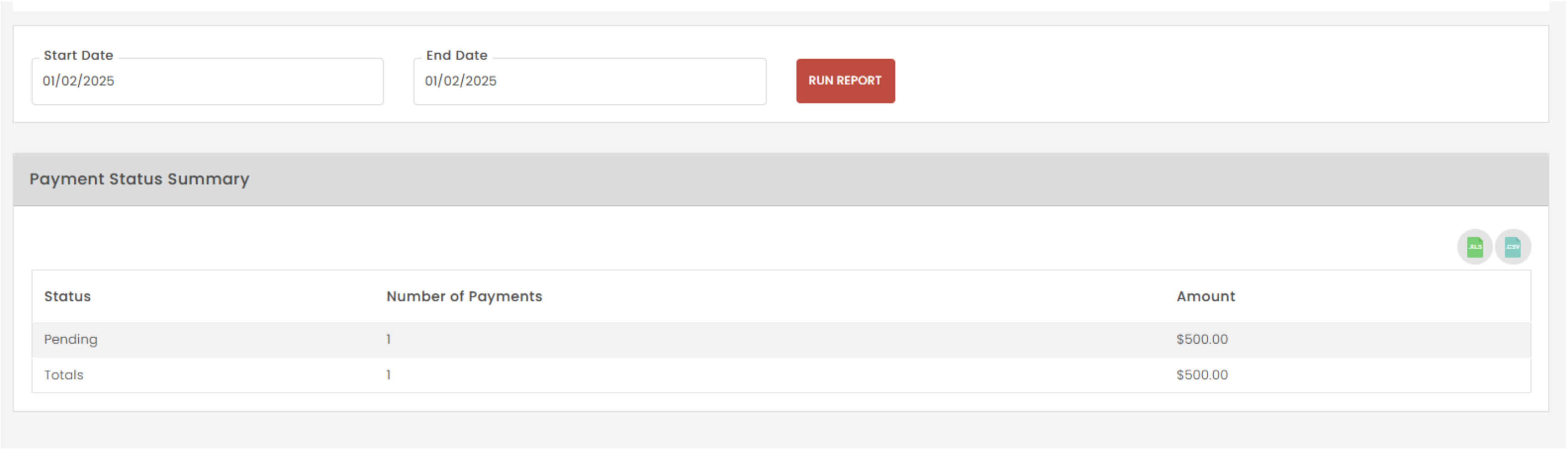
REPORTS – PAYMENT HISTORY REPORT

- Admin navigates to Payment History report and runs the report for a set time frame.
- Report can be run for up to 31-days at a time.
- Report data will populate in real-time.
- Admin can drilldown into a specific status by clicking anywhere on that line.



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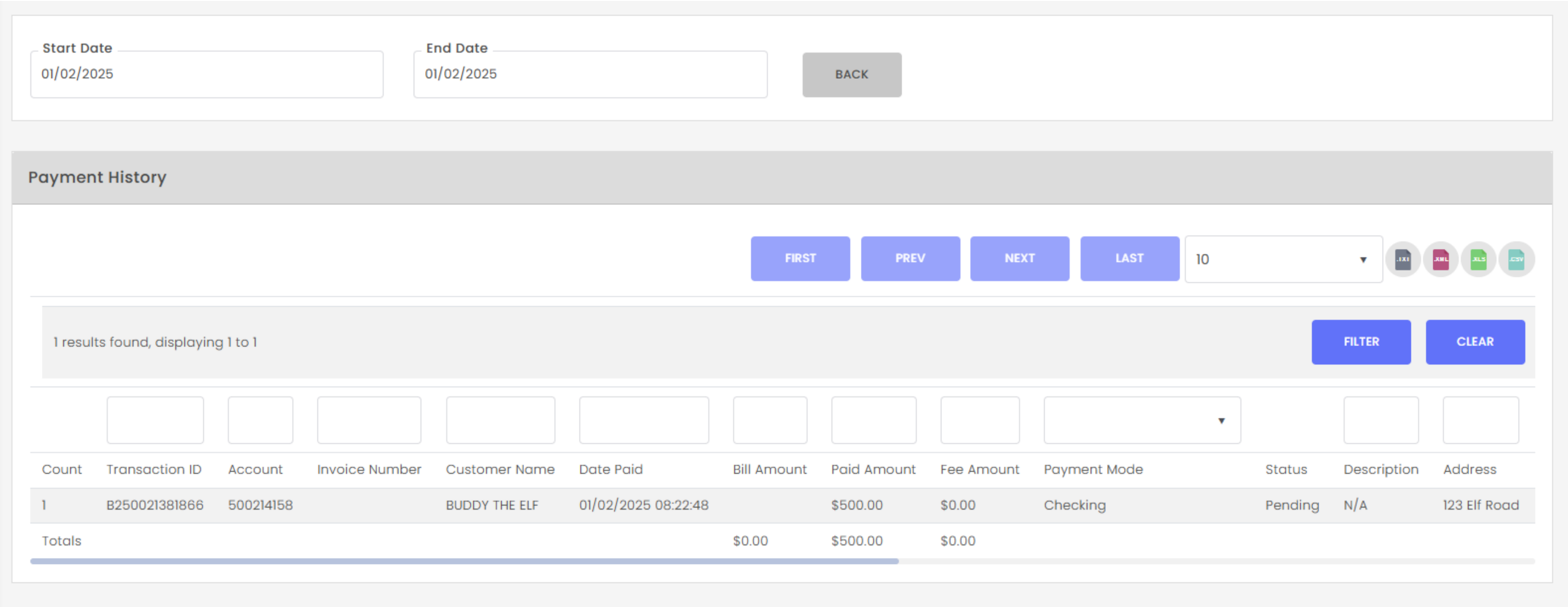
REPORTS – PAYMENT HISTORY REPORT – STATUS DETAILS

- Admin reviews the payments made with the status they chose.
- Boxes above each field can be used to filter data down.
- Passthrough data (i.e. address, etc) gets populated in this report.
- Admin can drilldown further into a specific payment by clicking anywhere on that line.



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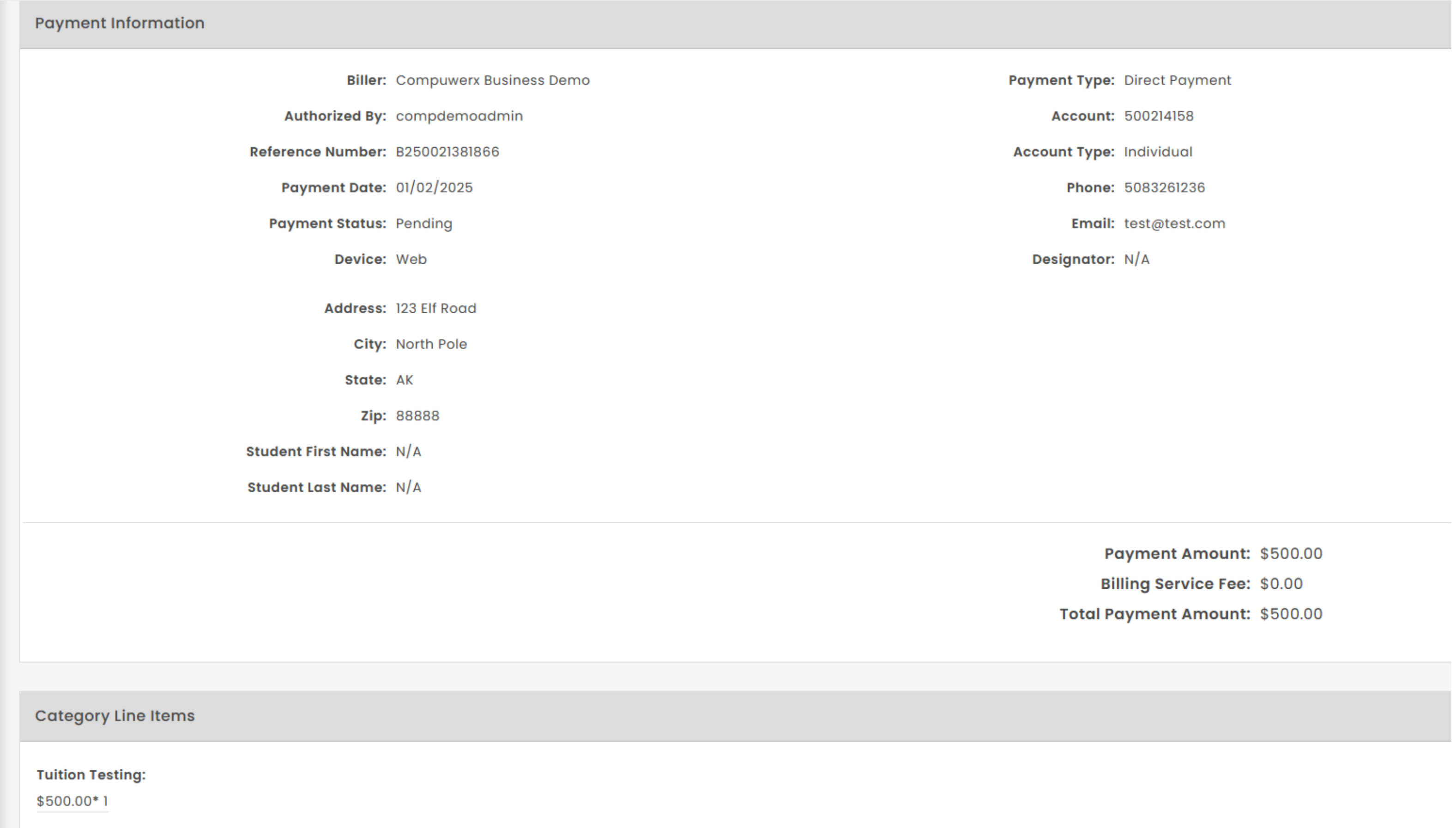
REPORTS – PAYMENT HISTORY REPORT – TRANSACTION DETAILS

- Admin can review the specific payment details.

- Reference number or Account ID can be copied down to be used for further payer support if needed.


Payment Information

Biler: Compuwerx Business Demo
Authorized By: compdemoadmin
Reference Number: B250021381866
Payment Date: 01/02/2025
Payment Status: Pending
Device: Web
Address: 123 Elf Road
City: North Pole
State: AK
Zip: 88888
Student First Name: N/A
Student Last Name: N/A

Payment Type: Direct Payment
Account: 500214158
Account Type: Individual
Phone: 5083261236
Email: test@test.com
Designator: N/A

Payment Amount: $500.00
Billing Service Fee: $0.00
Total Payment Amount: $500.00

Category Line Items

Tuition Testing:
$500.00* 1

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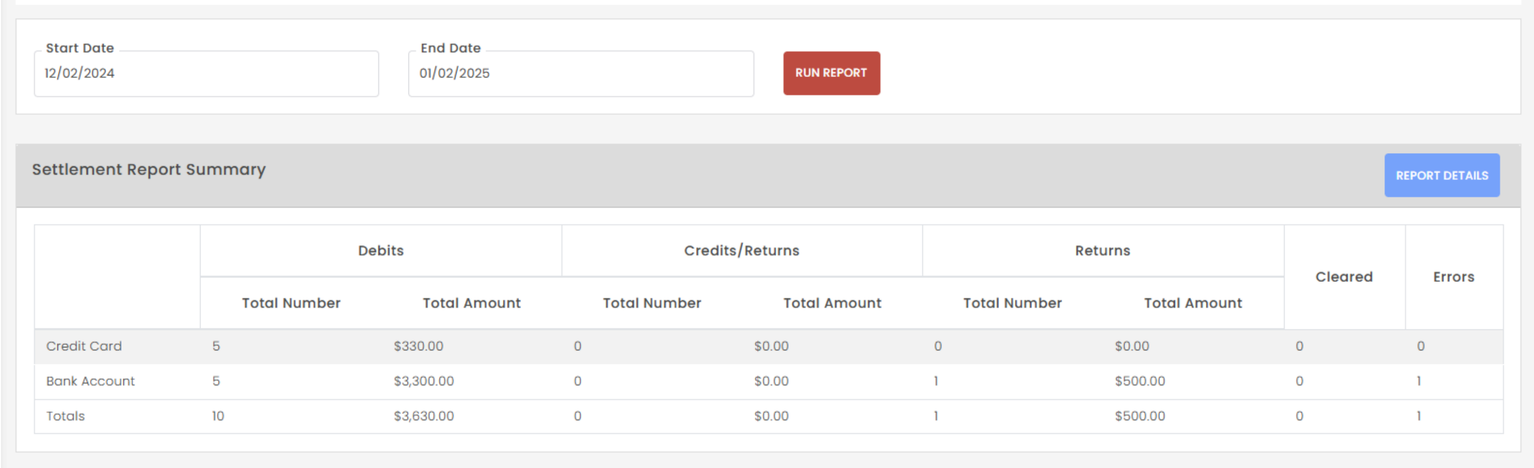
REPORTS – SETTLEMENT REPORT

- Admin navigates to Settlement Report and selects a date range of up to 31 days.

- Report summarizes total number and value of payments cleared and returned (if applicable) with the selected date range.

- Further transaction details can be displayed by selecting Report Details.



Start Date 12/02/2024

End Date 01/02/2025

RUN REPORT

Settlement Report Summary

REPORT DETAILS

	Debits		Credits/Returns		Returns		Cleared	Errors
	Total Number	Total Amount	Total Number	Total Amount	Total Number	Total Amount		
Credit Card	5	$330.00	0	$0.00	0	$0.00	0	0
Bank Account	5	$3,300.00	0	$0.00	1	$500.00	0	1
Totals	10	$3,630.00	0	$0.00	1	$500.00	0	1

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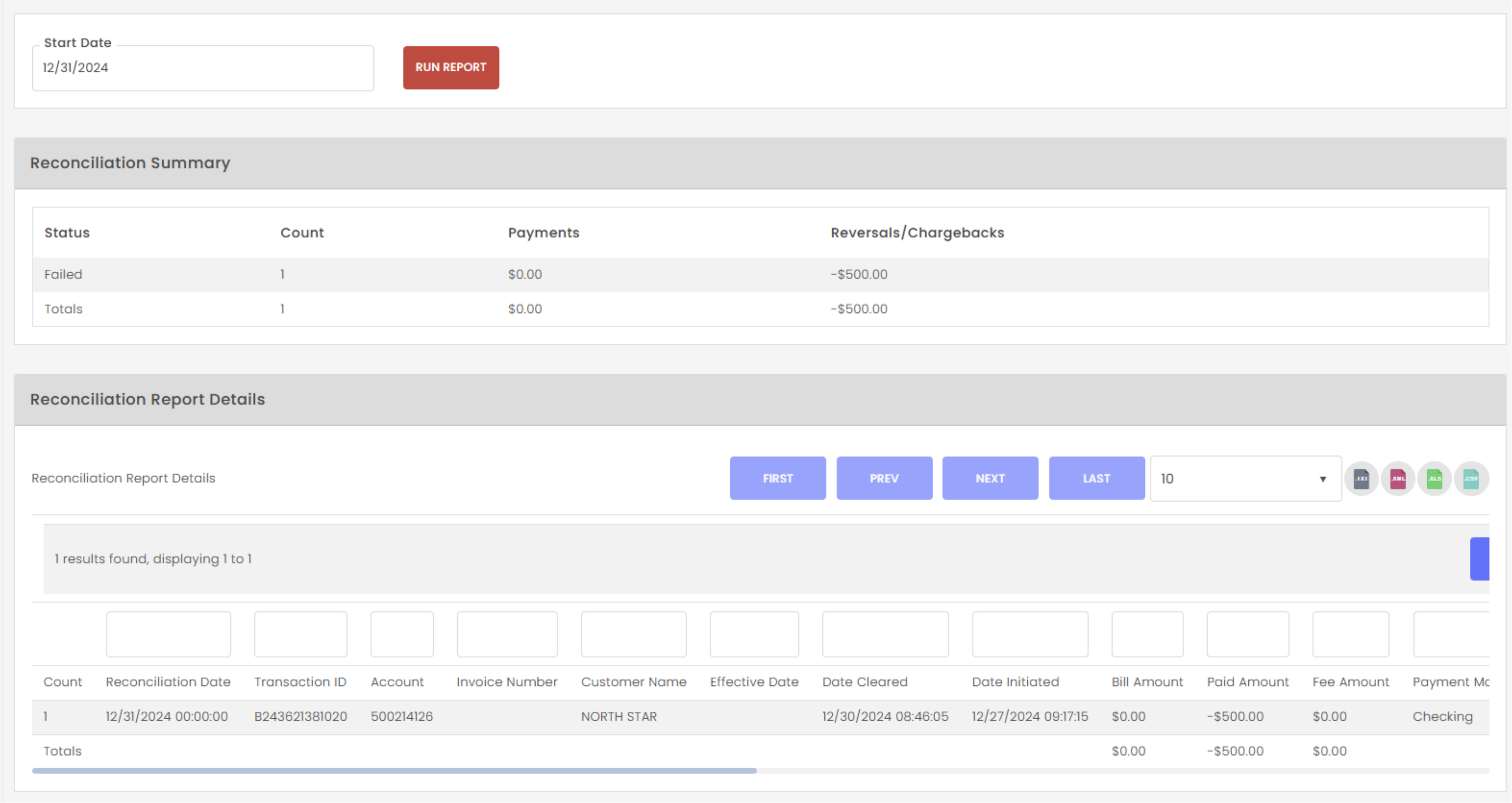
REPORTS – RECONCILIATION REPORT

- Admin navigates to Reconciliation Report and runs the report for a specific date.

- Reconciliation will summarize all processed transactions for a payment cycle and can include ACH returns as seen here.



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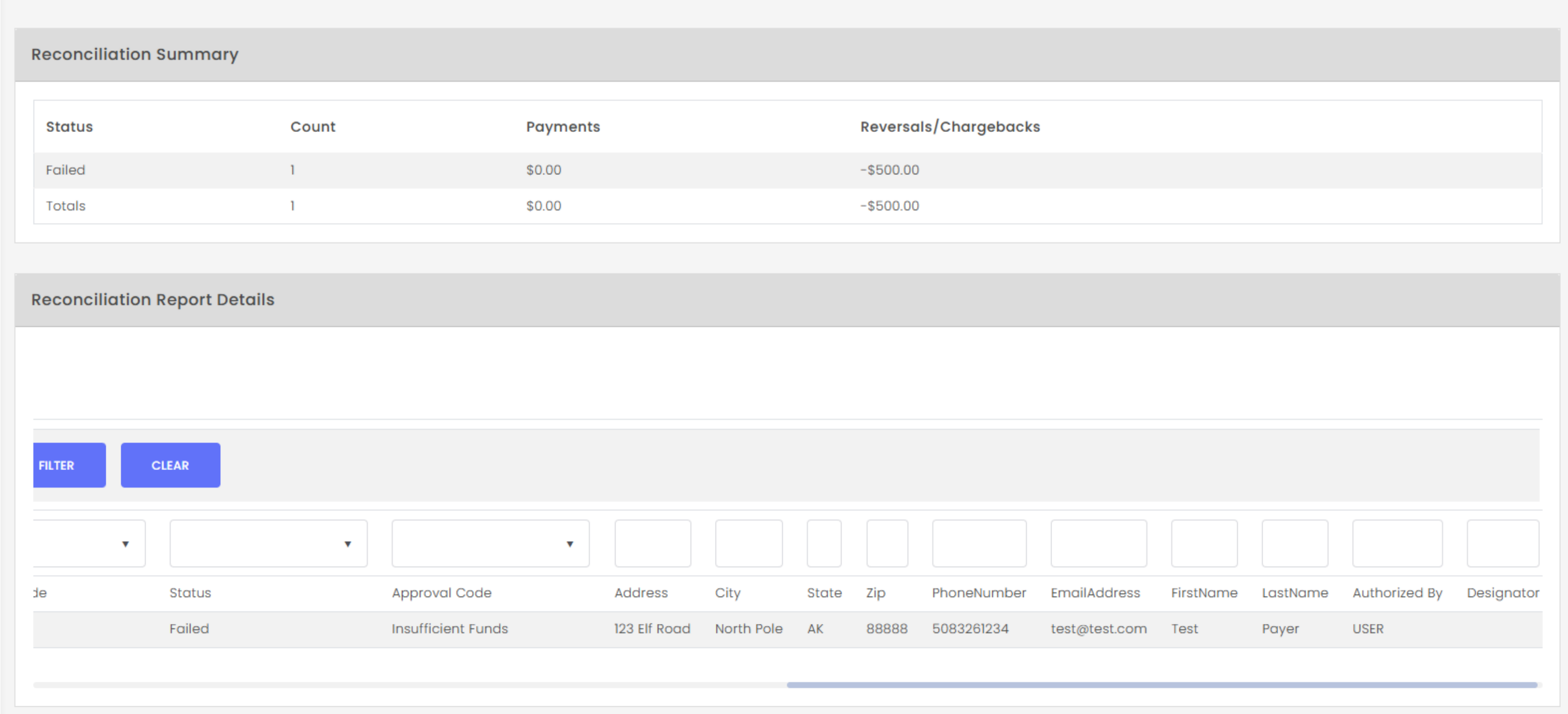
REPORTS – RECONCILIATION REPORT

- Admin scrolls to the right to review the Approval Code for the failed ACH transaction.
- CC chargebacks are not populated in any of the Aliaswire reports and need to be reviewed at the merchant level.
- Admin can click anywhere on the transaction line to drill down further.



Reconciliation Summary

Status	Count	Payments	Reversals/Chargebacks
Failed	1	$0.00	-$500.00
Totals	1	$0.00	-$500.00

Reconciliation Report Details

FILTER CLEAR

...de	Status	Approval Code	Address	City	State	Zip	PhoneNumber	EmailAddress	FirstName	LastName	Authorized By	Designator
	Failed	Insufficient Funds	123 Elf Road	North Pole	AK	88888	5083261234	test@test.com	Test	Payer	USER	

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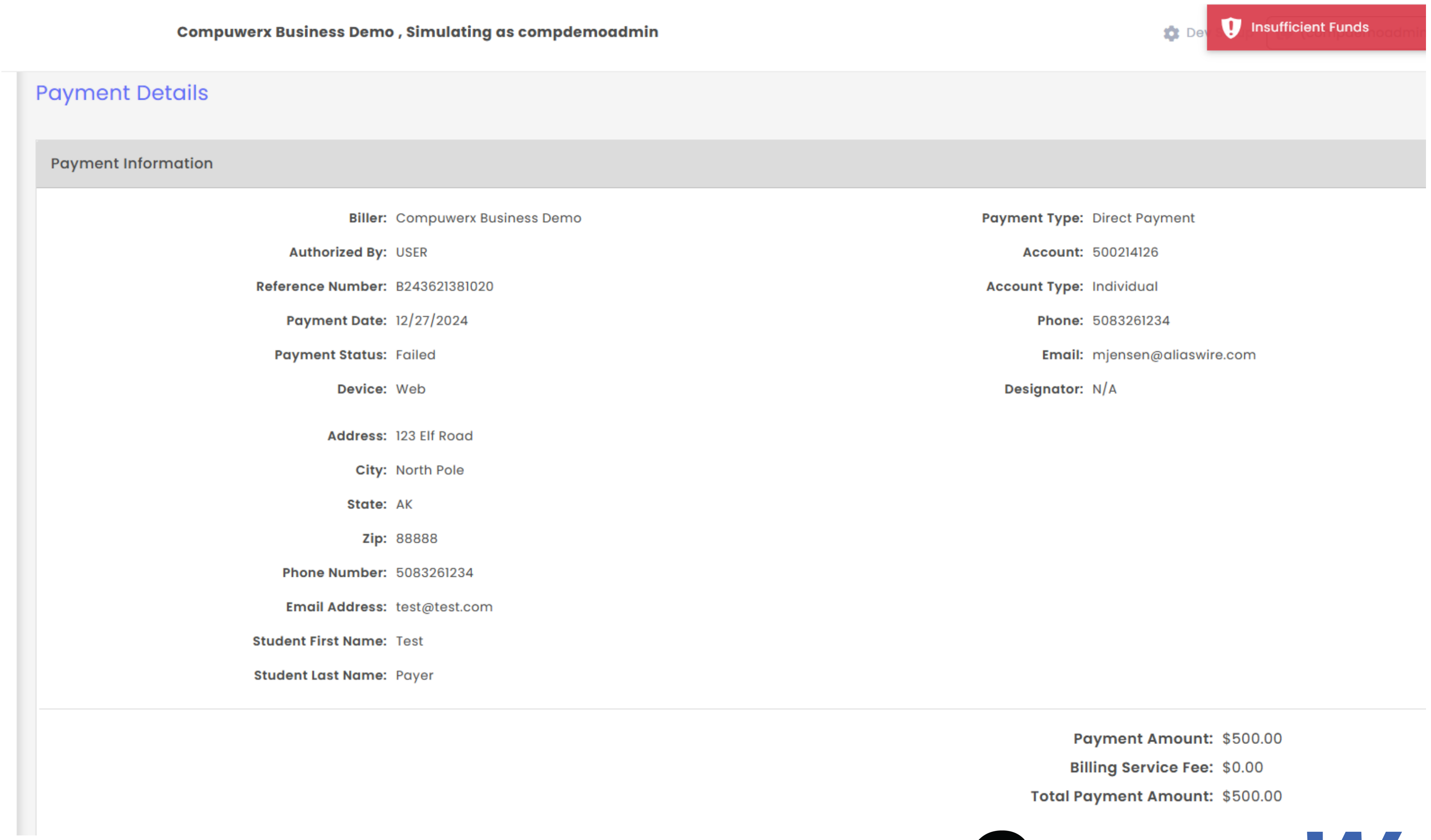
REPORTS – RECONCILIATION REPORT – TRANSACTION DETAILS

- Admin reviews the failed transaction.

- Insufficient Funds is the code seen for this failed transaction.


Compuwerx Business Demo , Simulating as compdemoadmin

Insufficient Funds

Payment Details

Payment Information

Biller:	Compuwerx Business Demo	**Payment Type:**	Direct Payment
Authorized By:	USER	**Account:**	500214126
Reference Number:	B243621381020	**Account Type:**	Individual
Payment Date:	12/27/2024	**Phone:**	5083261234
Payment Status:	Failed	**Email:**	mjensen@aliaswire.com
Device:	Web	**Designator:**	N/A
Address:	123 Elf Road		
City:	North Pole		
State:	AK		
Zip:	88888		
Phone Number:	5083261234		
Email Address:	test@test.com		
Student First Name:	Test		
Student Last Name:	Payer		

Payment Amount: $500.00
Billing Service Fee: $0.00
Total Payment Amount: $500.00

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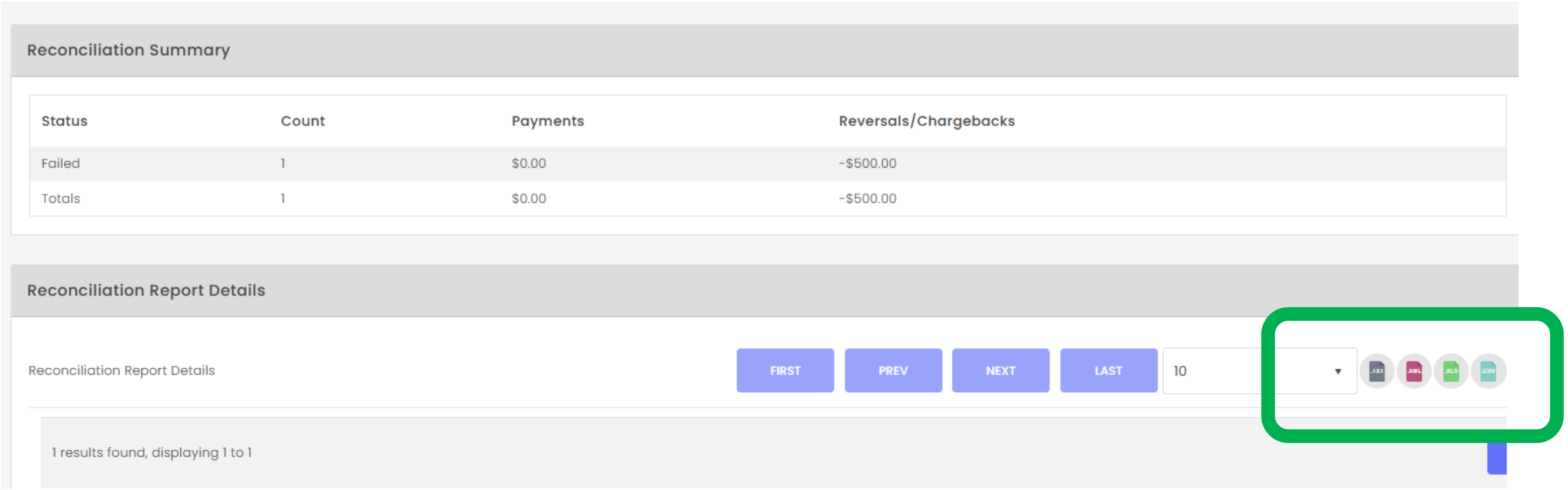
REPORTS – EXPORTING REPORTS

- Reports can be generated into an Excel file, CSV or XML file, or PDF file containing data from the selected report by clicking the respective export icons above the report.



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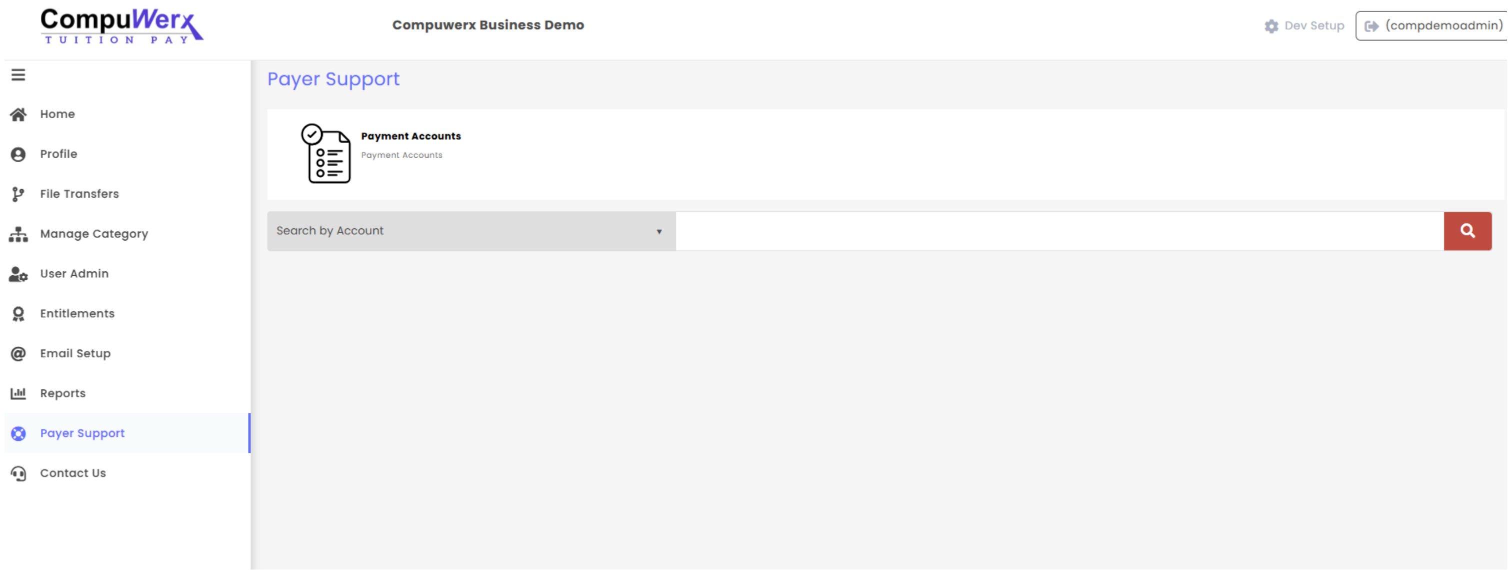
PAYER SUPPORT

- Admin navigates to Payer Support on the lefthand taskbar.

- **Note** – With a multi-division biller Admin must select a division from the dropdown to correctly use Payer Support.

- From here an Admin can search for a specific payer, add a new account, find past account activity, transactions, make a payment on behalf, cancel or void a payment, create and/or cancel an automatic payment plan.



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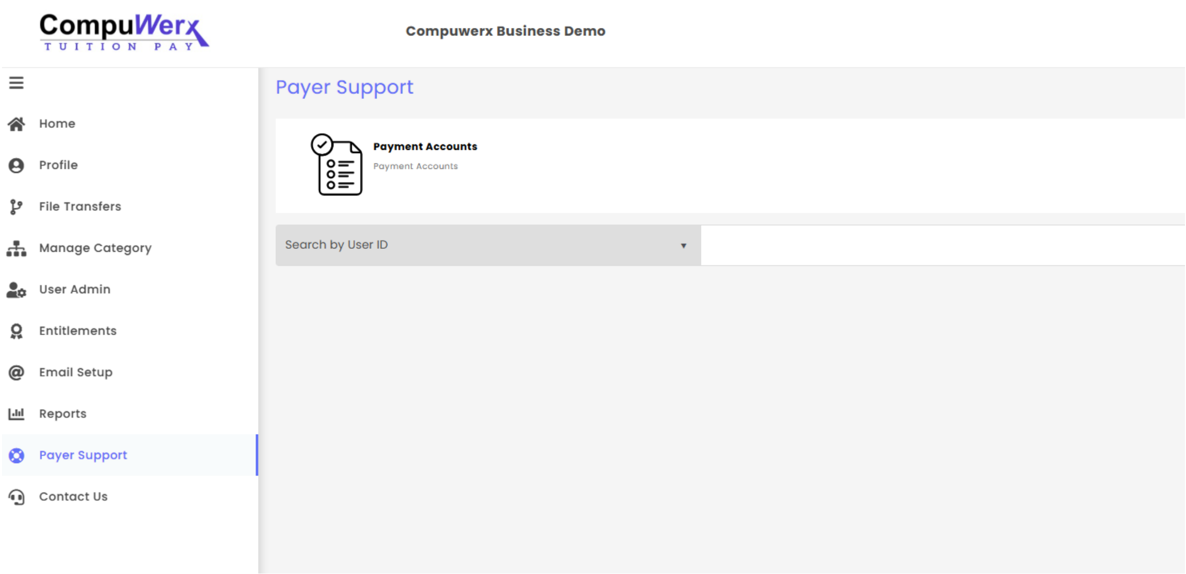
PAYER SUPPORT – SINGLE STUDENT SEARCH

- Admin chooses what to search by in the search by dropdown.
- Admin can select Account, User ID and Reference Number at a minimum.
- Admin selects User ID.



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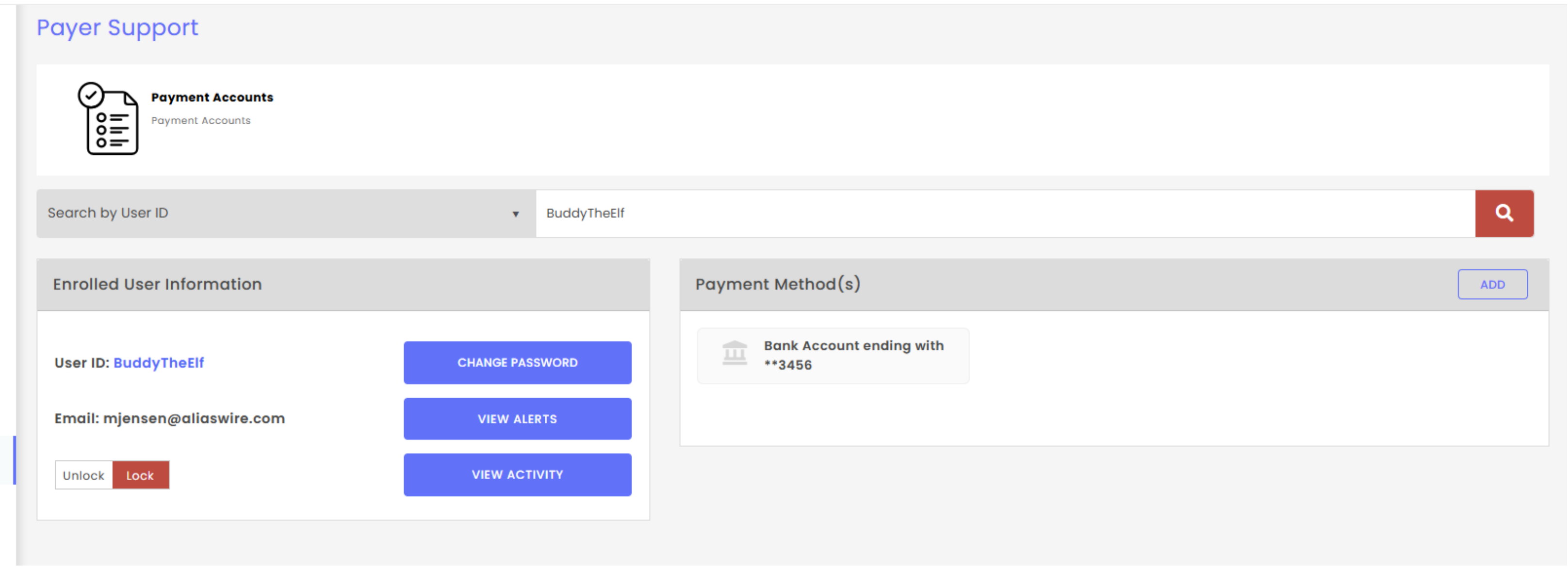
PAYER SUPPORT – REVIEW STUDENT PROFILE

- Admin reviews Enrolled User Information.

- Admin can update email address on Profile (select highlighted User ID), Change User Password, View Alerts (emails sent from system),View User Activity (payer website) and Add a new Payment Method.



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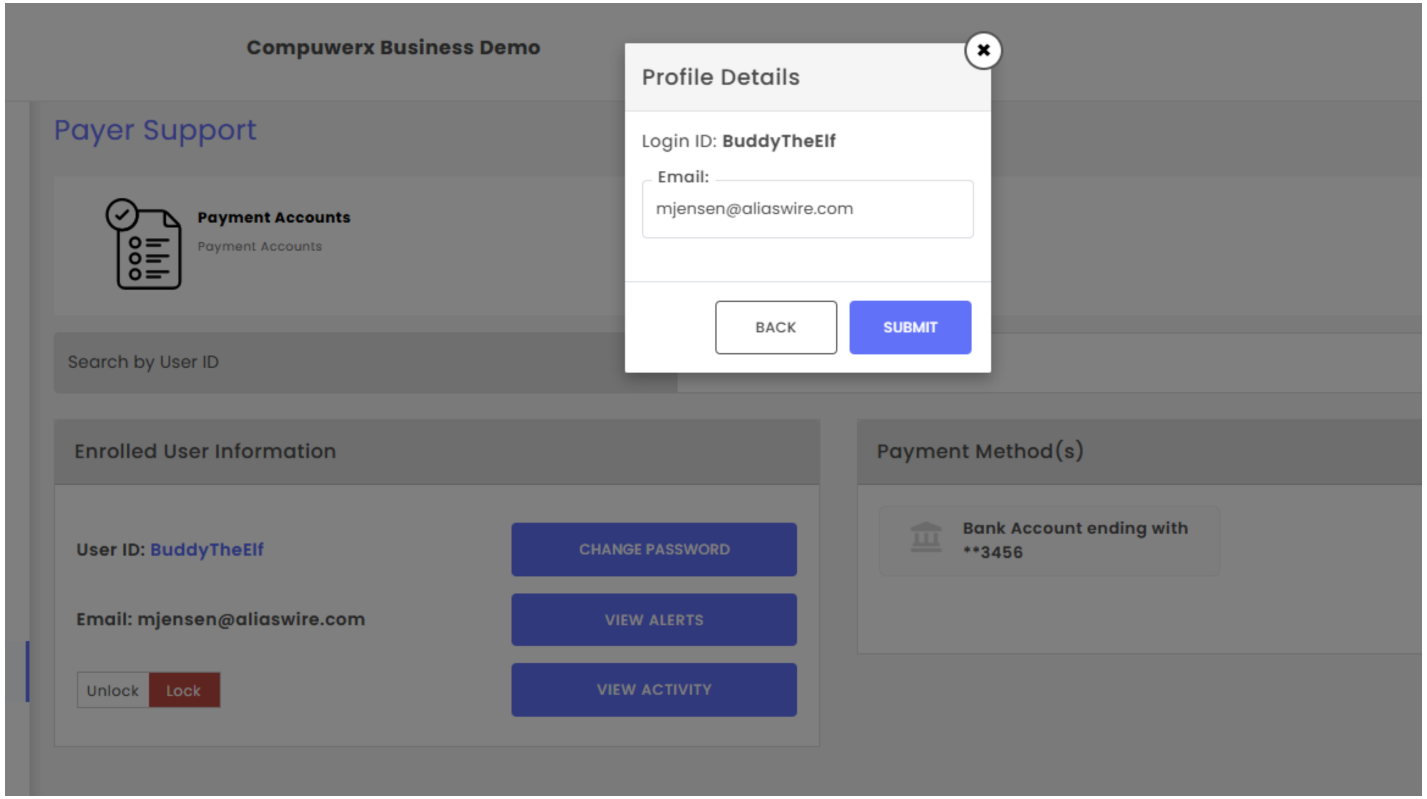
PAYER SUPPORT – UPDATE EMAIL ON PROFILE

- Admin selects highlighted User ID.

- Admin can update email address on Profile and then press Submit or go Back if no update is needed.



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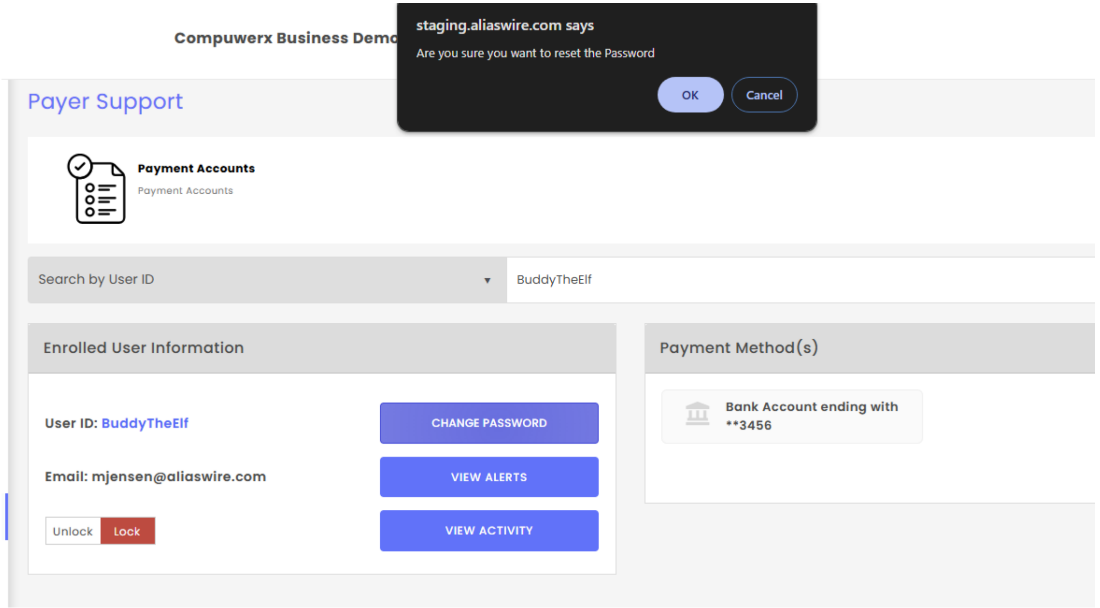
PAYER SUPPORT – CHANGE PROFILE PASSWORD

- Admin selects Change Password.
- Admin can select Ok to change or Cancel to go back.
- Admin selects Ok.



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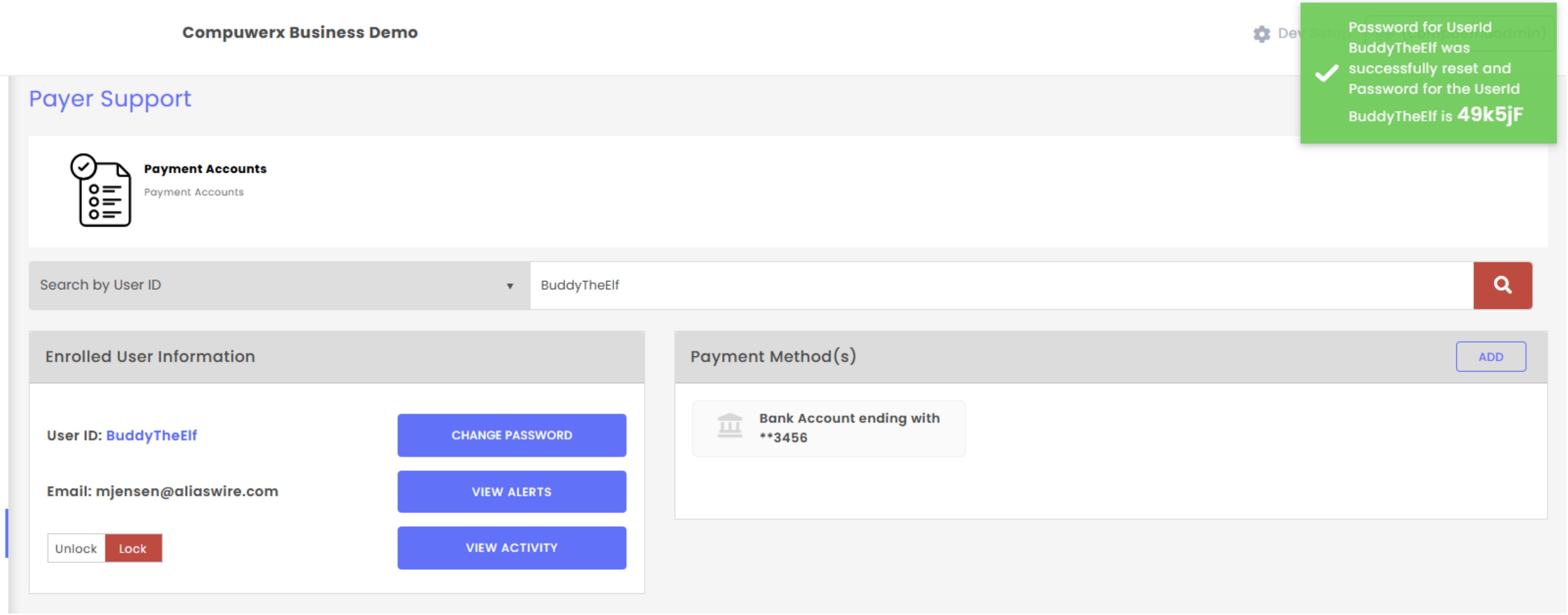
PAYER SUPPORT – CHANGE PROFILE PASSWORD

- Admin has successfully changed the Profile password.

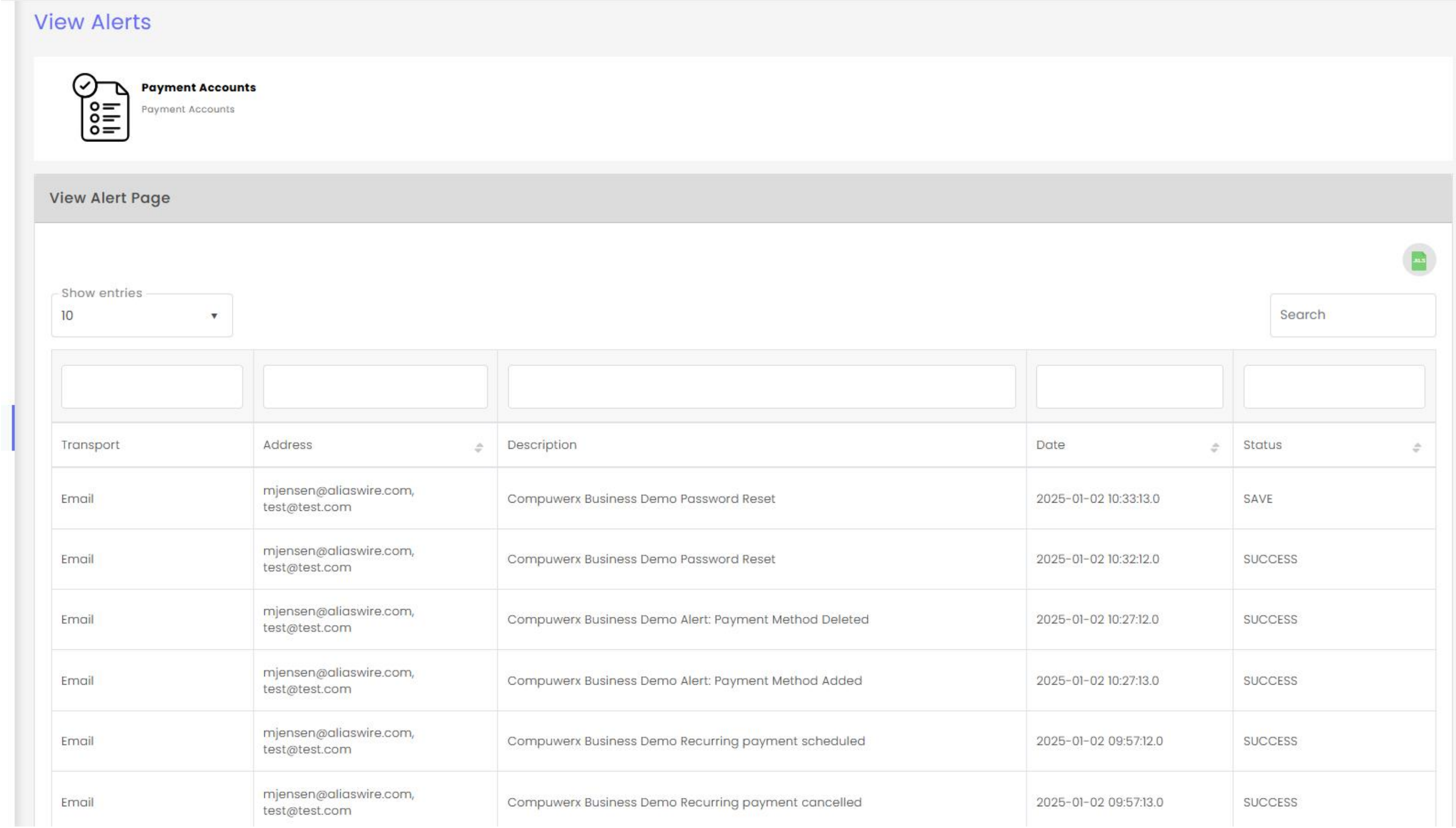
- New password will be emailed to the Enrolled payer’s email on file.



ADMIN SITE

PAYER SUPPORT – VIEW ALERTS

- Admin selects View Alerts to see all email correspondence sent from the system to the Enrolled email on file.



Transport	Address	Description	Date	Status
Email	mjensen@aliaswire.com, test@test.com	Compuwerx Business Demo Password Reset	2025-01-02 10:33:13.0	SAVE
Email	mjensen@aliaswire.com, test@test.com	Compuwerx Business Demo Password Reset	2025-01-02 10:32:12.0	SUCCESS
Email	mjensen@aliaswire.com, test@test.com	Compuwerx Business Demo Alert: Payment Method Deleted	2025-01-02 10:27:12.0	SUCCESS
Email	mjensen@aliaswire.com, test@test.com	Compuwerx Business Demo Alert: Payment Method Added	2025-01-02 10:27:13.0	SUCCESS
Email	mjensen@aliaswire.com, test@test.com	Compuwerx Business Demo Recurring payment scheduled	2025-01-02 09:57:12.0	SUCCESS
Email	mjensen@aliaswire.com, test@test.com	Compuwerx Business Demo Recurring payment cancelled	2025-01-02 09:57:13.0	SUCCESS

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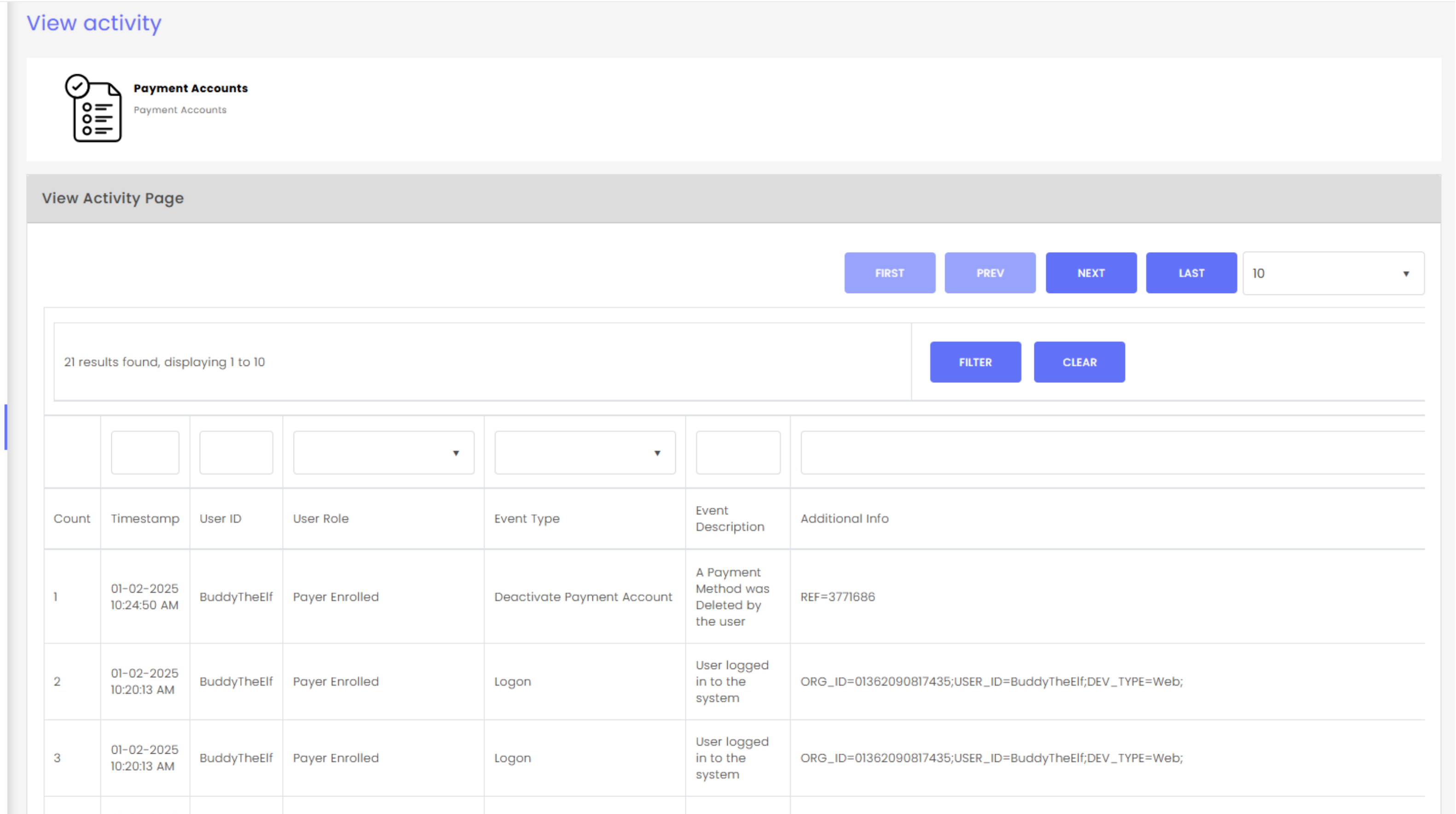
PAYER SUPPORT – VIEW ACTIVITY

- Admin selects View Activity to see all payer activity on the website.



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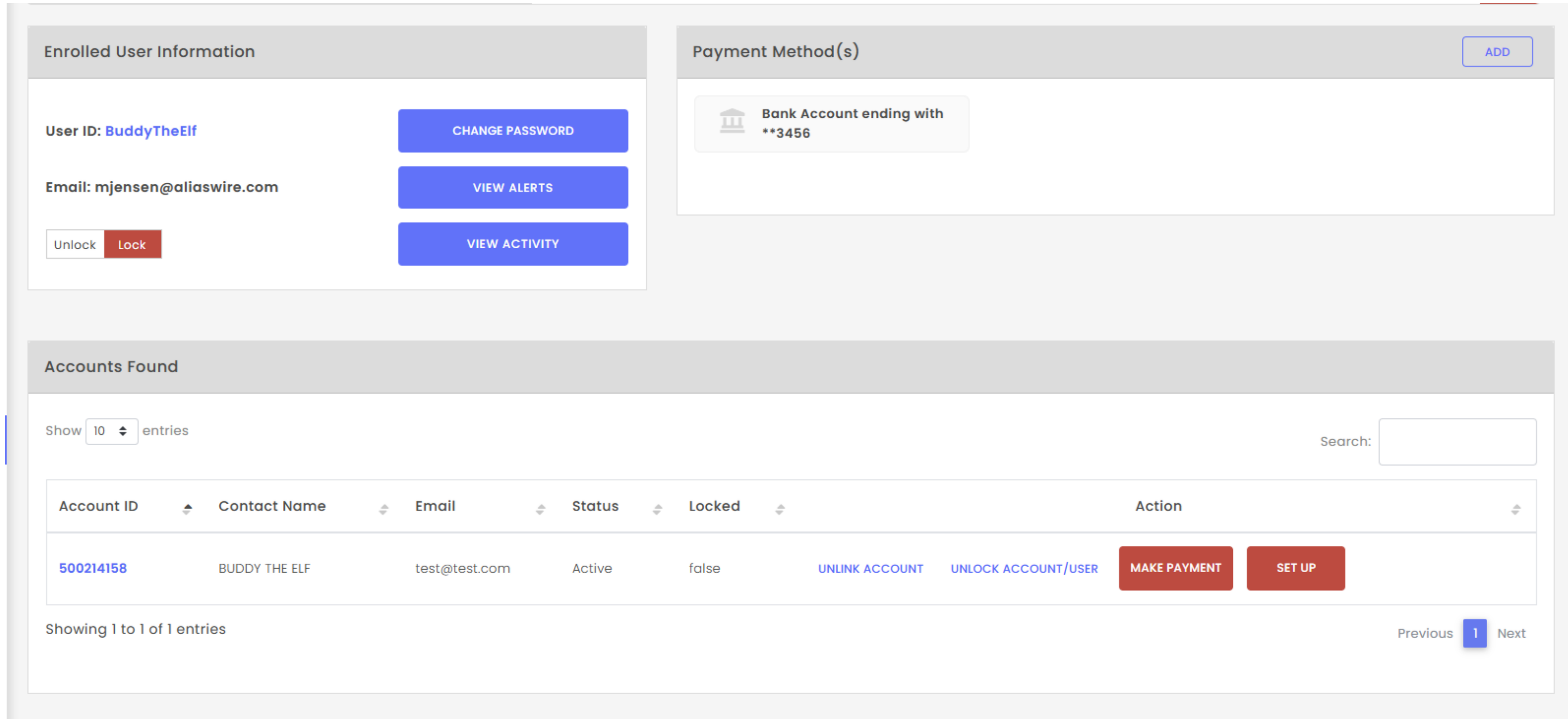
PAYER SUPPORT – REVIEW ACCOUNT

- Admin reviews Account associated with the profile.
- Admin can update account information, Unlink the Account from the profile (if applicable), Unlock Account, Make Payment or Set Up or Cancel an Automatic Payment Plan.



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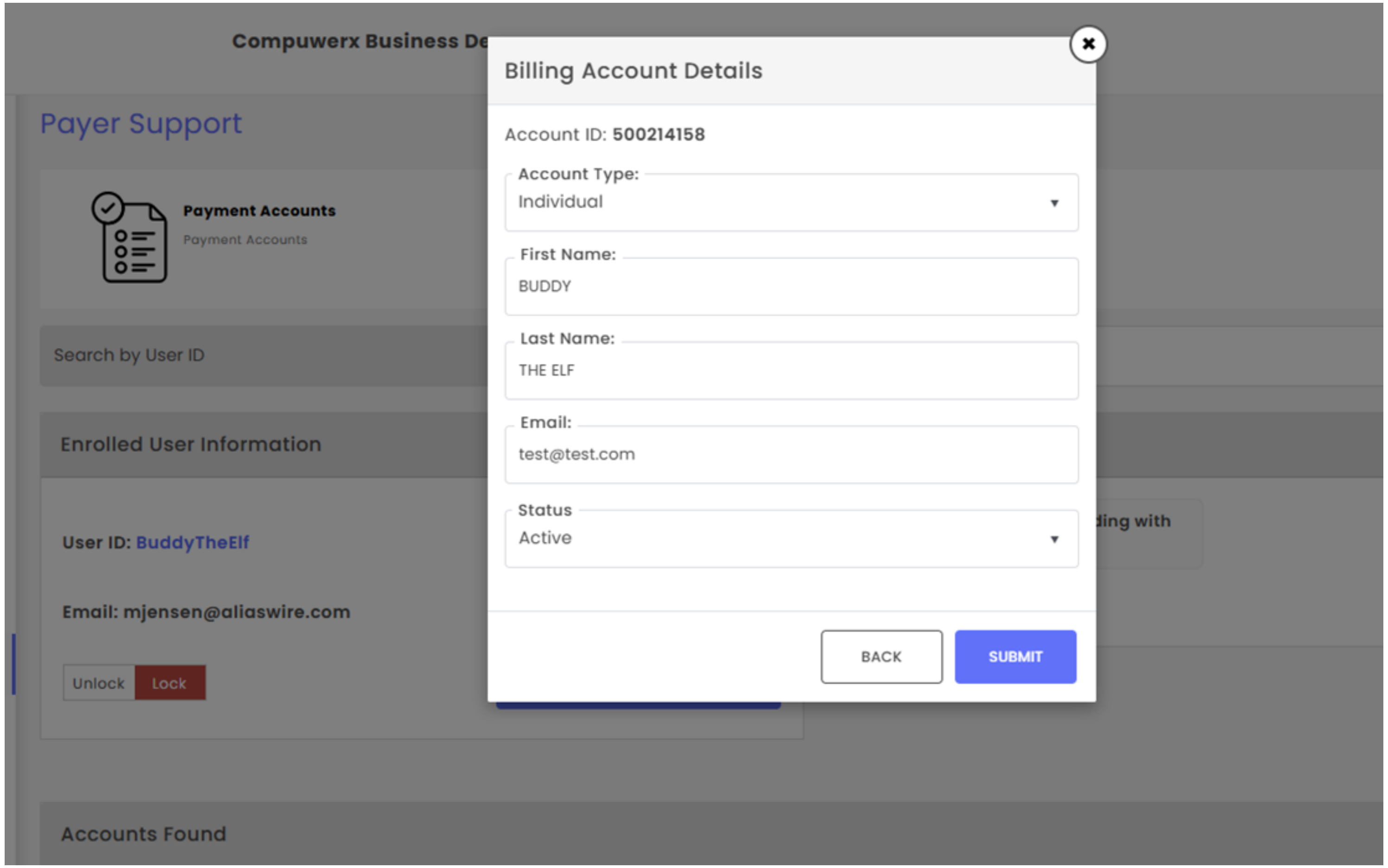
PAYER SUPPORT – UPDATE ACCOUNT DETAILS

- Admin selects the highlighted Account ID.

- Admin can then update the account details manually. Account type, first and last name and account email or make the account inactive (if appliable).

- <u>**Note**</u> – If the account has a Profile associated the Account email no longer receives correspondence from the system, the Profile email does.



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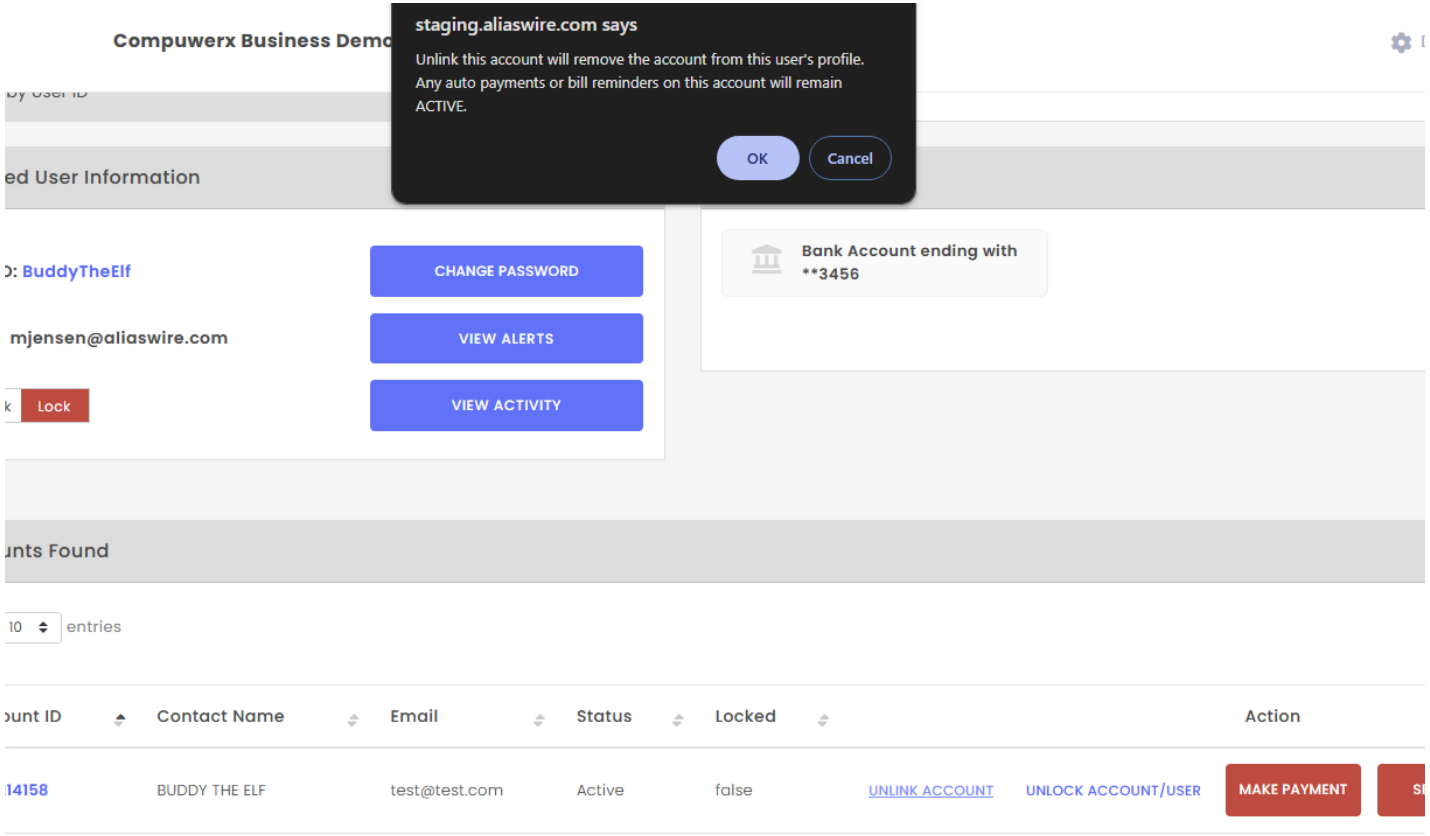
PAYER SUPPORT – UNLINK ACCOUNT

- Admin selects Unlink Account.
- Admin can then manually unlink the account from the Profile if the account was mistakenly added to the wrong Profile or needs to be changed to a new Profile.
- **<u>Note</u>** – any auto payment plans (if applicable) must be cancelled prior to this action.



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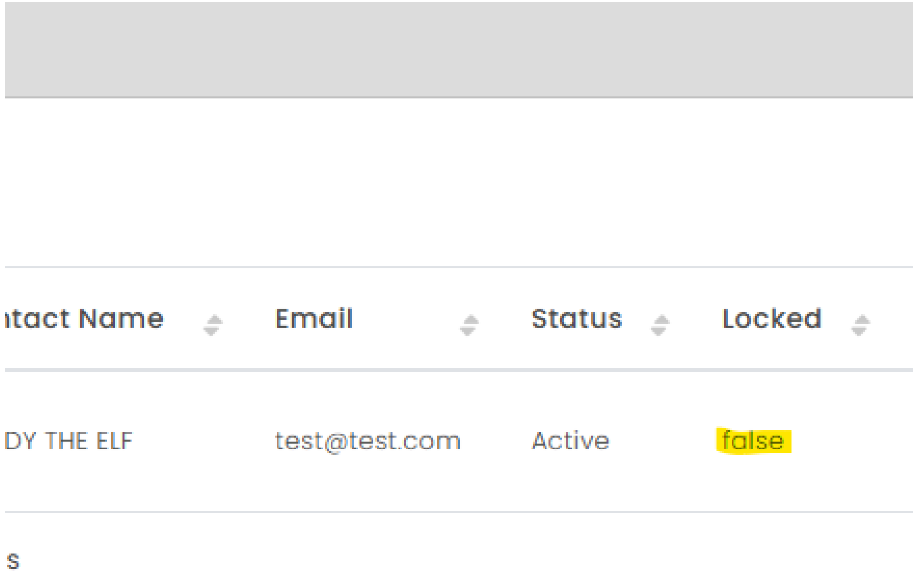
PAYER SUPPORT – UNLOCK ACCOUNT

- Admin selects Unlock Account if the Locked status is set to true.



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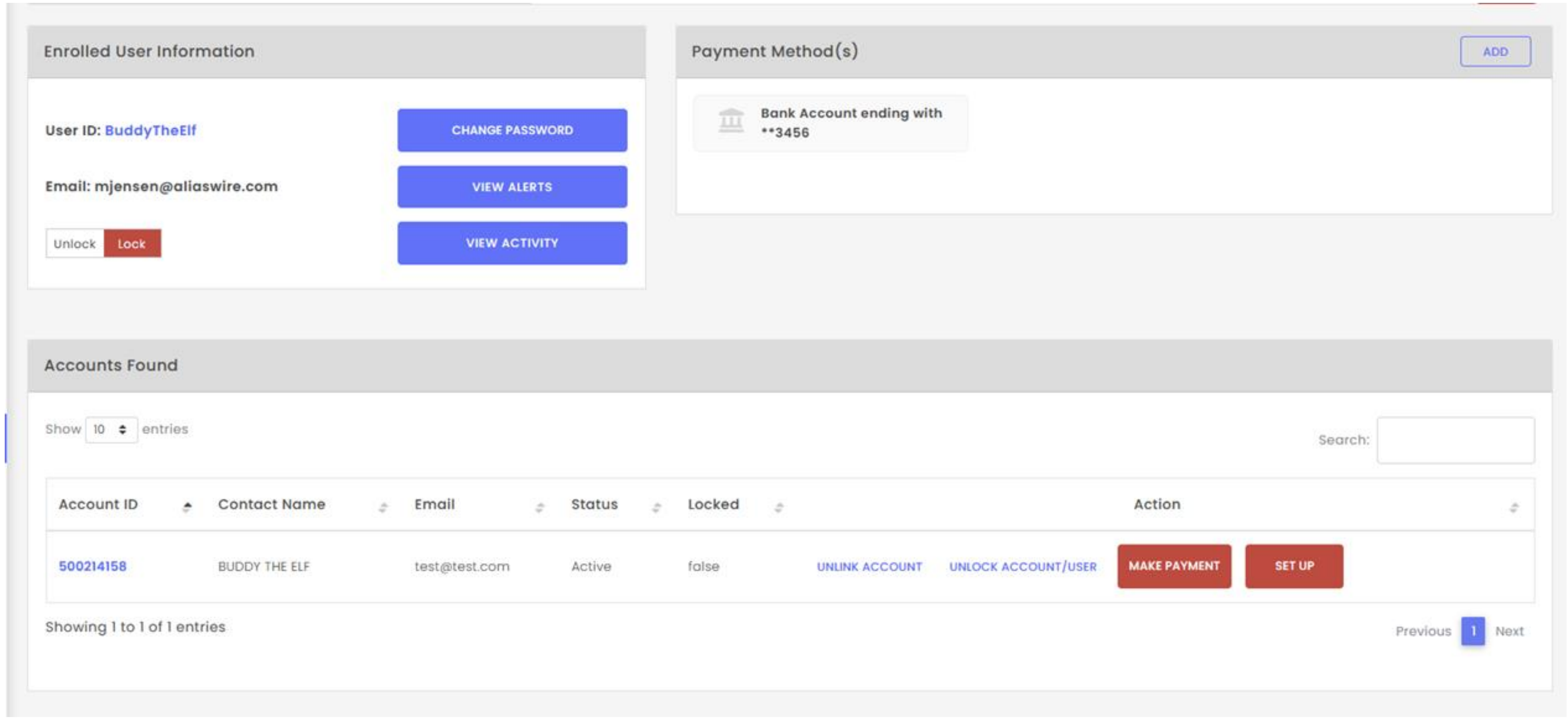
PAYER SUPPORT – MAKE PAYMENT ON BEHALF

- Admin selects Make Payment.
- <u>**Note**</u> – This capability can be granted to specific Admin/CSR users through Entitlements.



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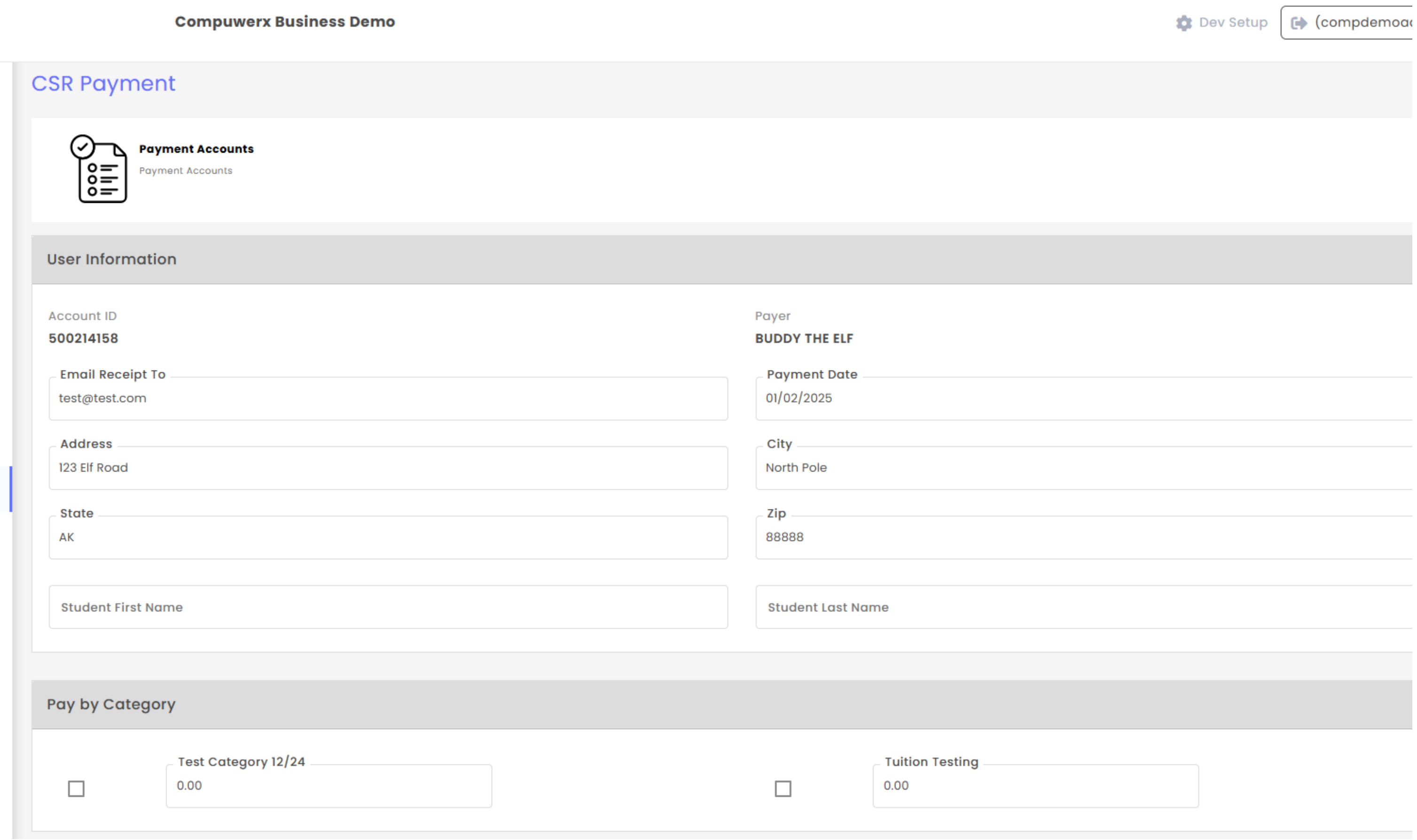
PAYER SUPPORT – MAKE PAYMENT ON BEHALF

- Admin or CSR proceeds to verify and fill out payer information along with any passthroughs.



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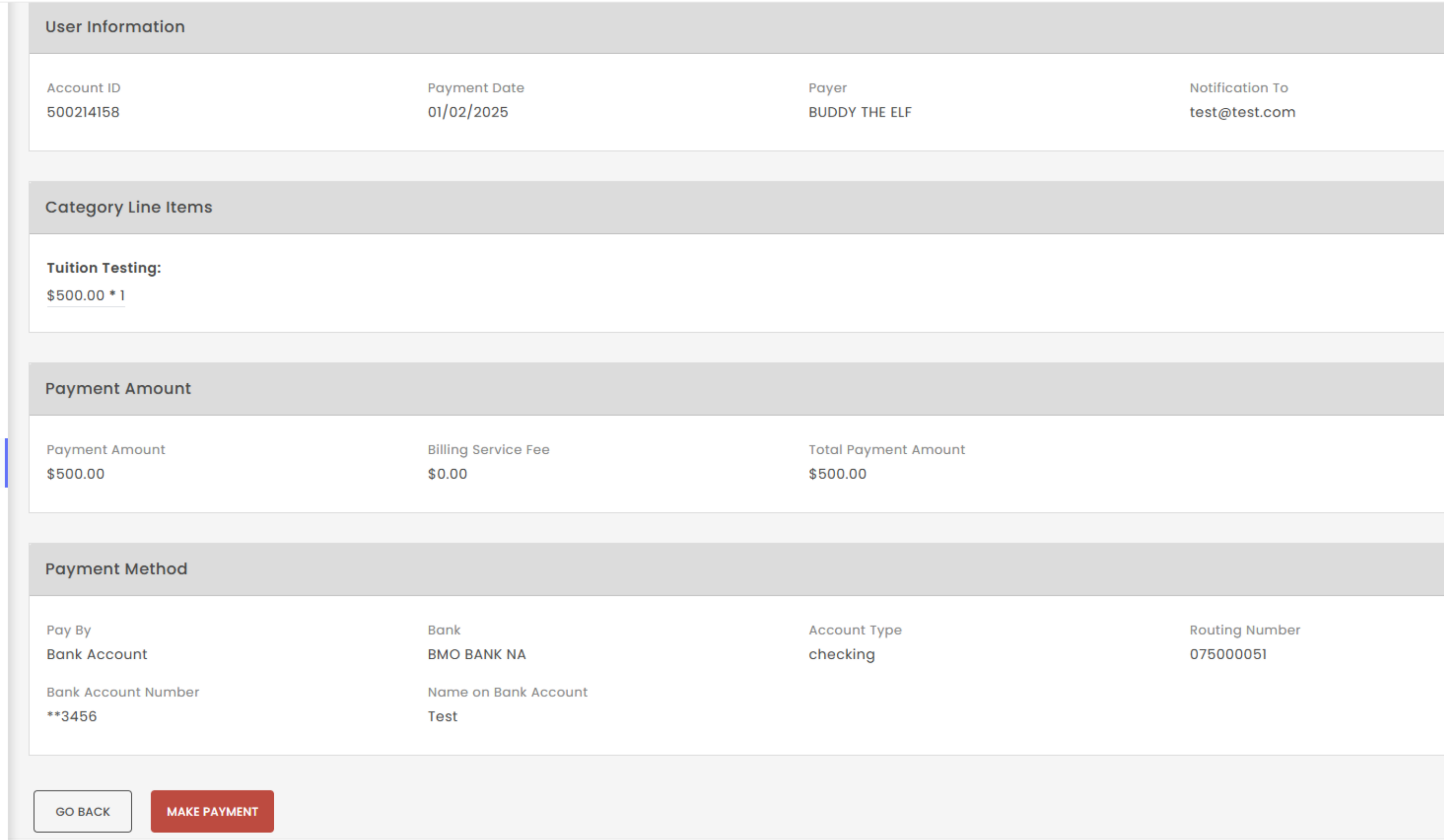
PAYER SUPPORT – MAKE PAYMENT ON BEHALF

- Admin or CSR reviews payment information, if there is an error, select Go Back to make a correction or select Make Payment to finalize the payment.



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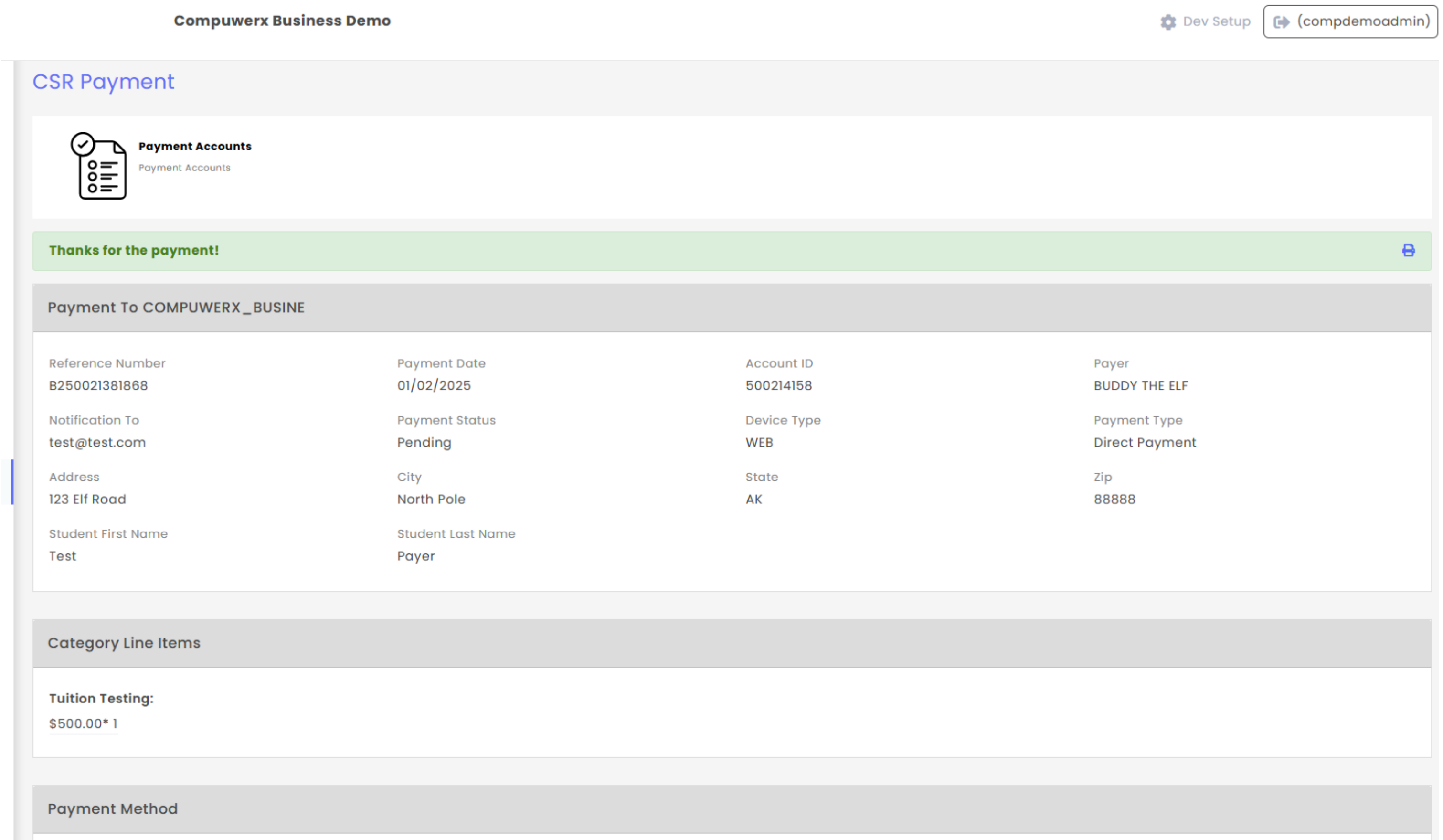
PAYER SUPPORT – MAKE PAYMENT ON BEHALF

- A successful Admin payment has now been made on behalf of the payer.
- The payer will receive an email receipt for this payment momentarily.



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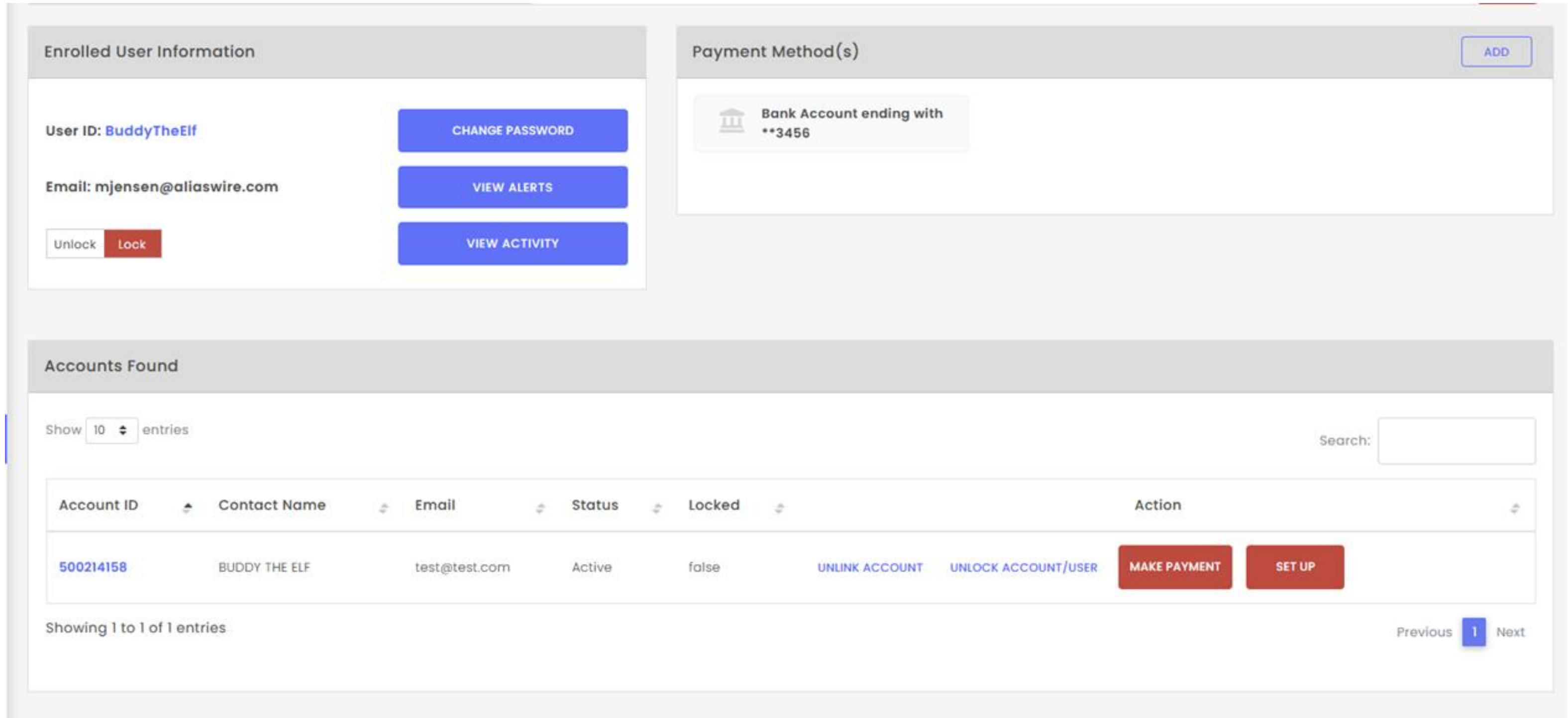
PAYER SUPPORT – SET UP AUTO PAYMENT PLAN

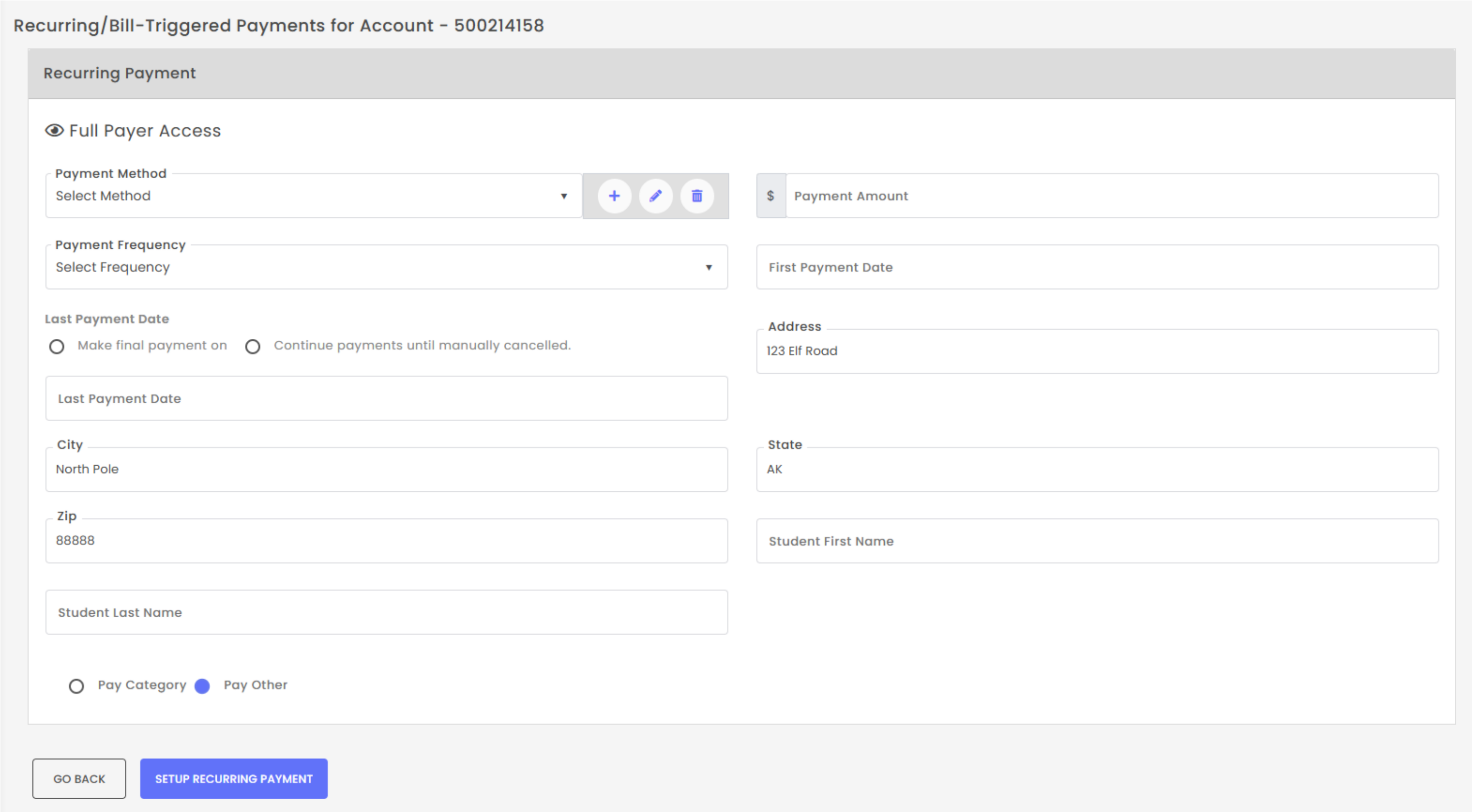
- Admin selects Set Up next to the Make Payment button to create a new Automatic Payment plan or to cancel a pre-existing one.



ADMIN SITE

PAYER SUPPORT – SET UP AUTO PAYMENT PLAN

- Admin selects payment method, Pay Category or Pay Other and then fills out the remaining fields for the Payer.
- Admin reviews the information and selects Setup Recurring Payment.



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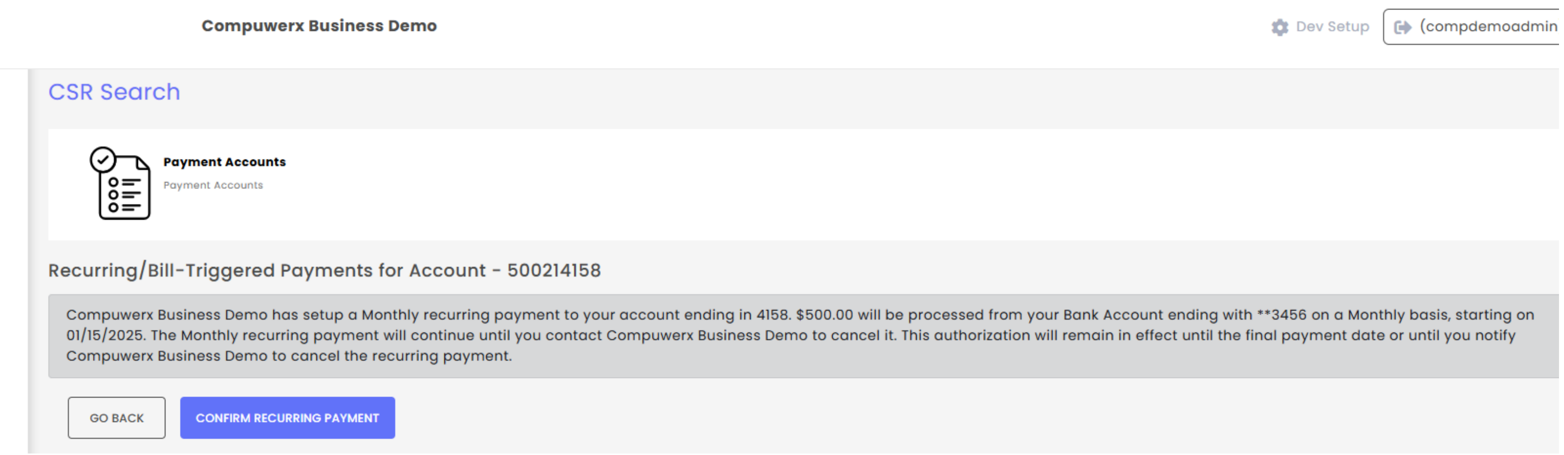
PAYER SUPPORT – SET UP AUTO PAYMENT PLAN

- Admin reviews automatic payment plan terms with Payer and selects Confirm Recurring Payment or if something is incorrect Go Back to make a change.



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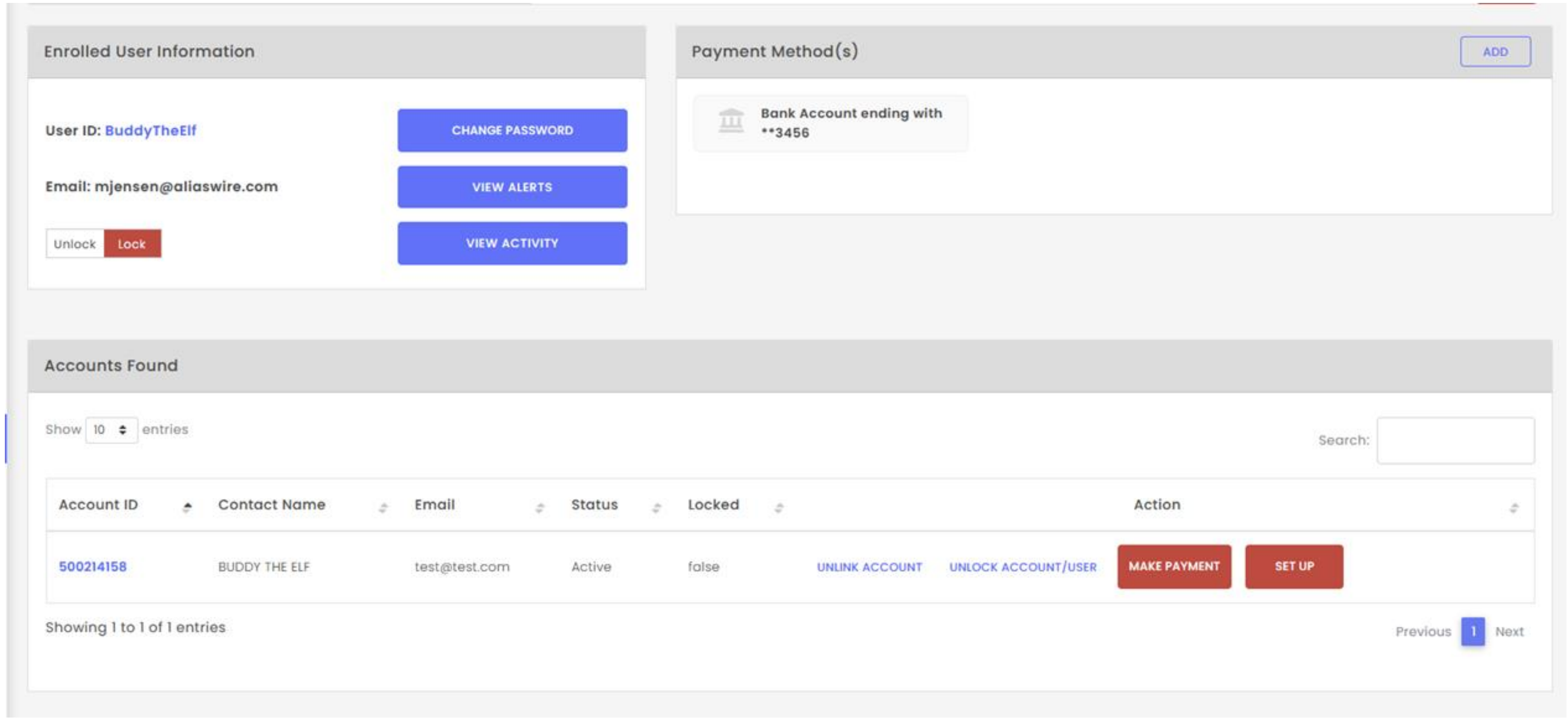
PAYER SUPPORT – CANCEL AUTO PAYMENT PLAN

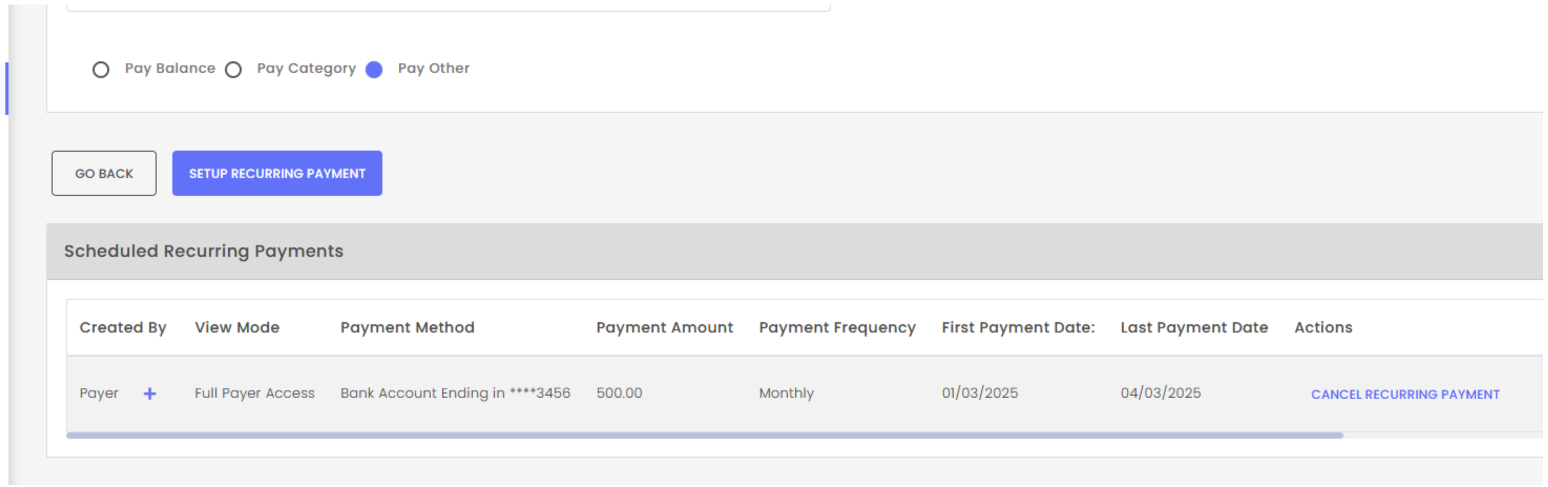
- Admin selects Set Up to cancel an automatic payment plan.



ADMIN SITE

PAYER SUPPORT – CANCEL AUTO PAYMENT PLAN

- Admin scrolls to the bottom of the Setup page to see a previously created payment plan.
- Admin selects Cancel Recurring Payment.



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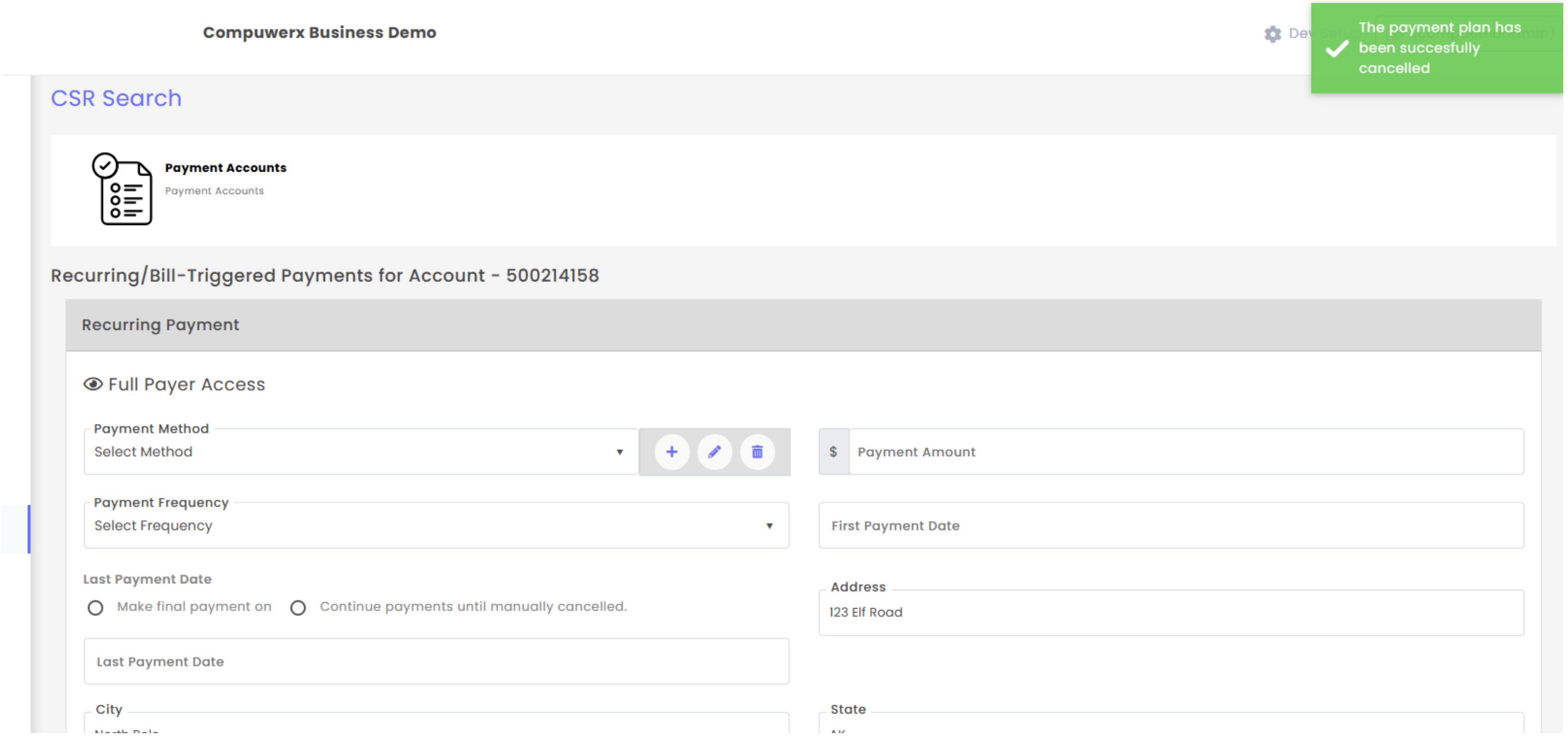
PAYER SUPPORT – CANCEL AUTO PAYMENT PLAN

- Admin sees the message that the plan has successfully been cancelled.

- Admin can scroll to the bottom of the page to see the scheduled recurring payment plan is no longer there.

- **<u>Note</u>** – You cannot edit a previously setup payment plan it would need to be cancelled and reset up.



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PAYER SUPPORT – SINGLE PAYER PAYMENT REVIEW

- Admin searches by Account ID or User ID within the Payer Support screen.

- Admin scrolls down to the Payments Found portion of the Payer Support page.

Payments Found

Show 10 entries

Search:

Reference Number	Bill Number	Account ID	Payment Date	Payment Amount	Status	Action
B250021381869	N/A	500214158	01/15/2025 00:00:00	$500.00	Cancelled	N/A
B250021381868	N/A	500214158	01/02/2025 11:44:40	$500.00	Cancelled **	N/A
B250021381867	N/A	500214158	01/03/2025 06:00:00	$500.00	Cancelled	N/A
B250021381866	N/A	500214158	01/02/2025 08:22:48	$500.00	Pending	CANCEL/REVERSE
B243651381358	N/A	500214158	12/30/2024 13:02:19	$800.00	Pending	CANCEL/REVERSE
B243631381237	N/A	500214158	01/28/2025 06:00:00	$1,000.00	Cancelled	N/A
B243621381034	N/A	500214158	12/28/2024 06:00:00	$1,000.00	Pending	CANCEL/REVERSE
B243621381033	N/A	500214158	12/27/2024 10:45:29	$500.00	Pending	CANCEL/REVERSE

Showing 1 to 8 of 8 entries

Previous 1 Next

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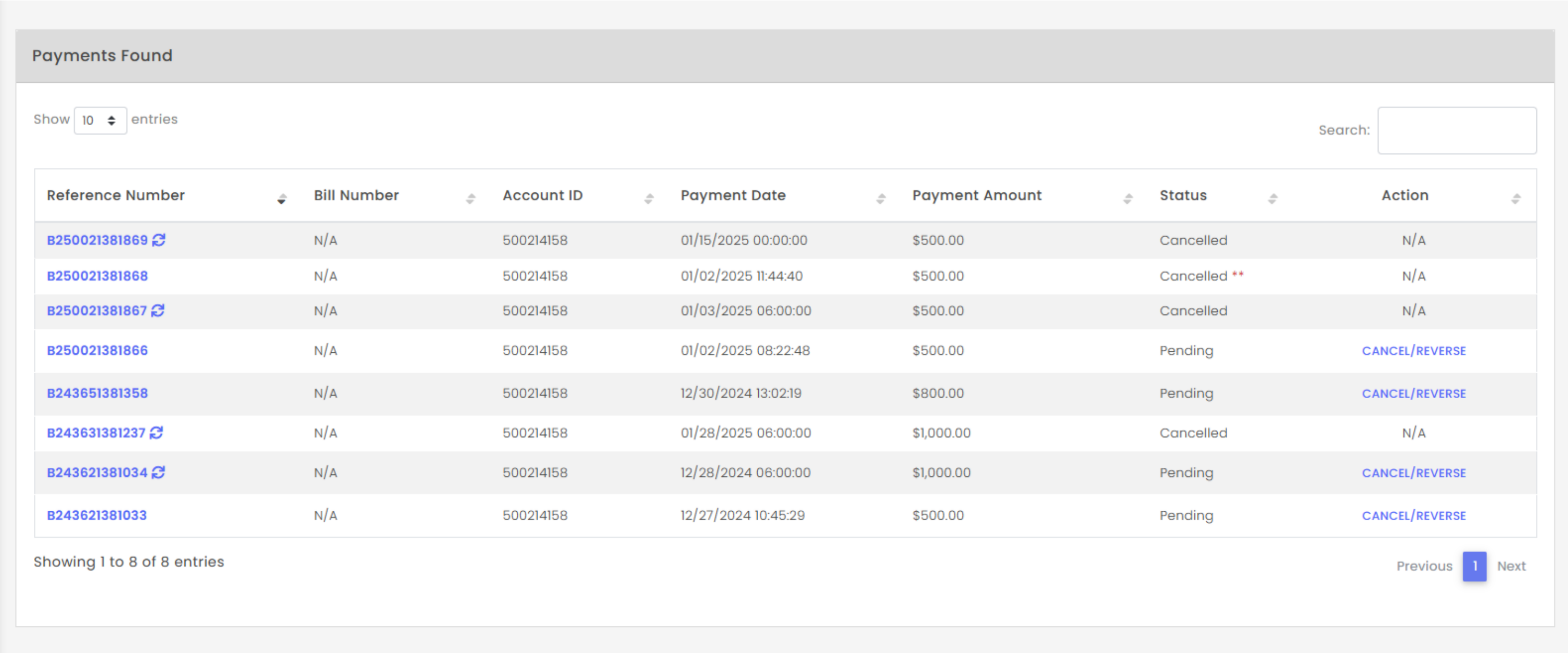
PAYER SUPPORT – PAYMENT VOID OR REVERSAL

- Admin can select a specific Reference Number to further review that specific payment or select the Cancel/Reverse action button to void or reverse a previously made payment.

- Admin selects Cancel/Reverse on an available payment.

- Past payments can be refunded from up to 18 months in the past.



Payments Found

Show 10 entries

Search:

Reference Number	Bill Number	Account ID	Payment Date	Payment Amount	Status	Action
B250021381869	N/A	500214158	01/15/2025 00:00:00	$500.00	Cancelled	N/A
B250021381868	N/A	500214158	01/02/2025 11:44:40	$500.00	Cancelled **	N/A
B250021381867	N/A	500214158	01/03/2025 06:00:00	$500.00	Cancelled	N/A
B250021381866	N/A	500214158	01/02/2025 08:22:48	$500.00	Pending	CANCEL/REVERSE
B243651381358	N/A	500214158	12/30/2024 13:02:19	$800.00	Pending	CANCEL/REVERSE
B243631381237	N/A	500214158	01/28/2025 06:00:00	$1,000.00	Cancelled	N/A
B243621381034	N/A	500214158	12/28/2024 06:00:00	$1,000.00	Pending	CANCEL/REVERSE
B243621381033	N/A	500214158	12/27/2024 10:45:29	$500.00	Pending	CANCEL/REVERSE

Showing 1 to 8 of 8 entries

Previous 1 Next

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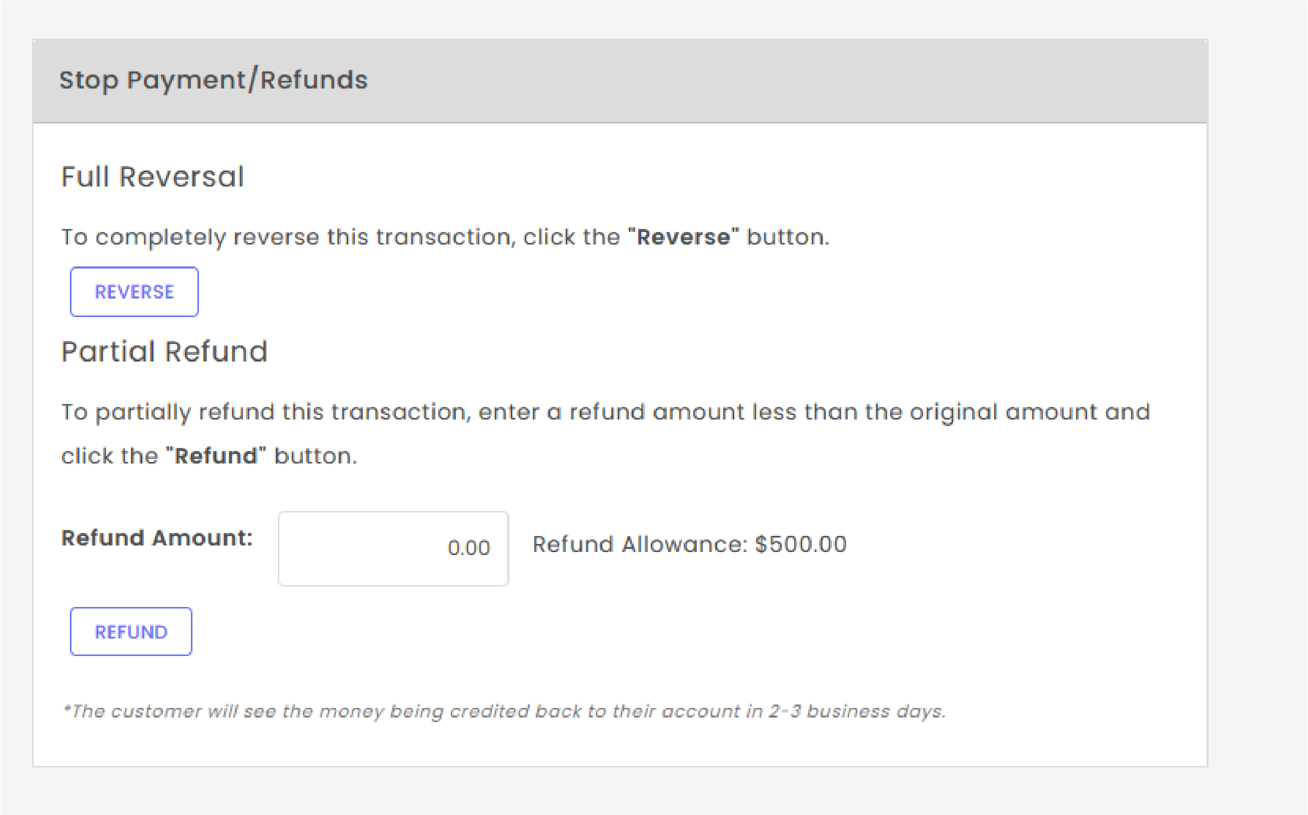
ADMIN SITE

PAYER SUPPORT – SINGLE PAYER PAYMENT REVIEW

- Admin will then have two options to either select Full Reversal or type on a Partial Refund amount.
- To provide back half of this payment the Admin would type $250 in the Refund Amount box and select Refund.
- **Note** – The same payment can be refunded multiple times if originally partially refunded.



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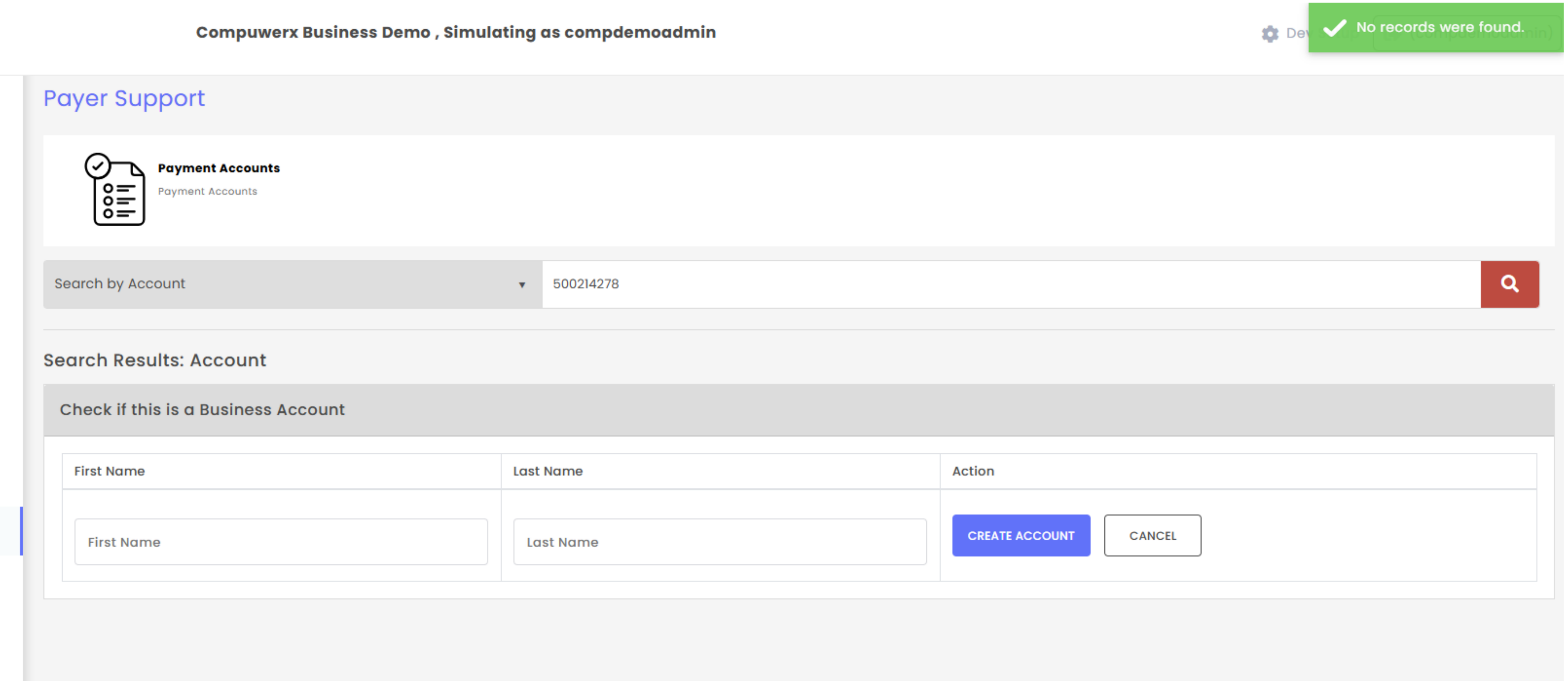
ADMIN SITE

PAYER SUPPORT – ADDING A NEW STUDENT

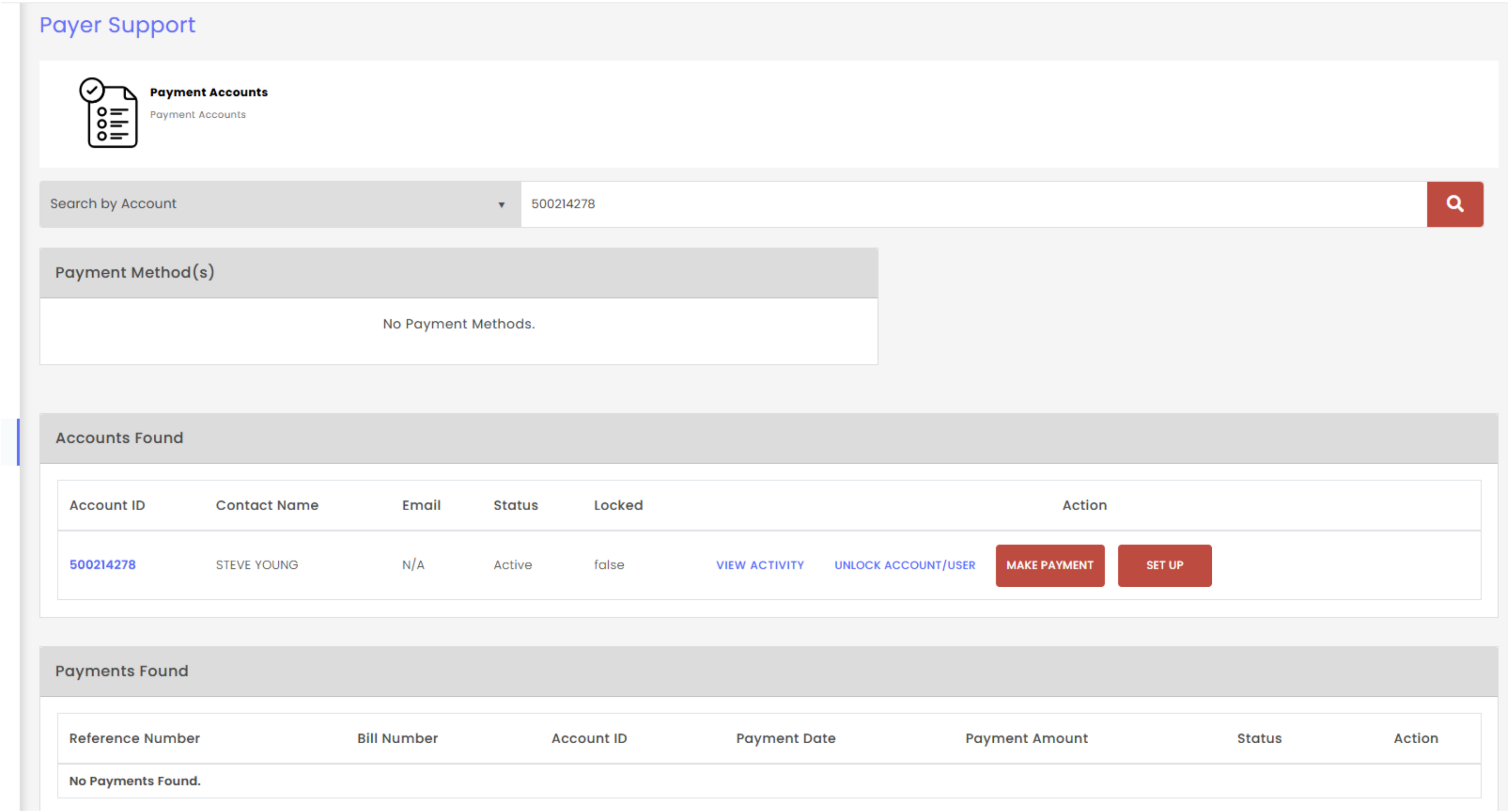
- Admin will search for an Account ID and not find one in the system.
- Admin can then enter First Name and Last Name for the student and select Create Account.



ADMIN SITE

PAYER SUPPORT – ADDING A NEW STUDENT

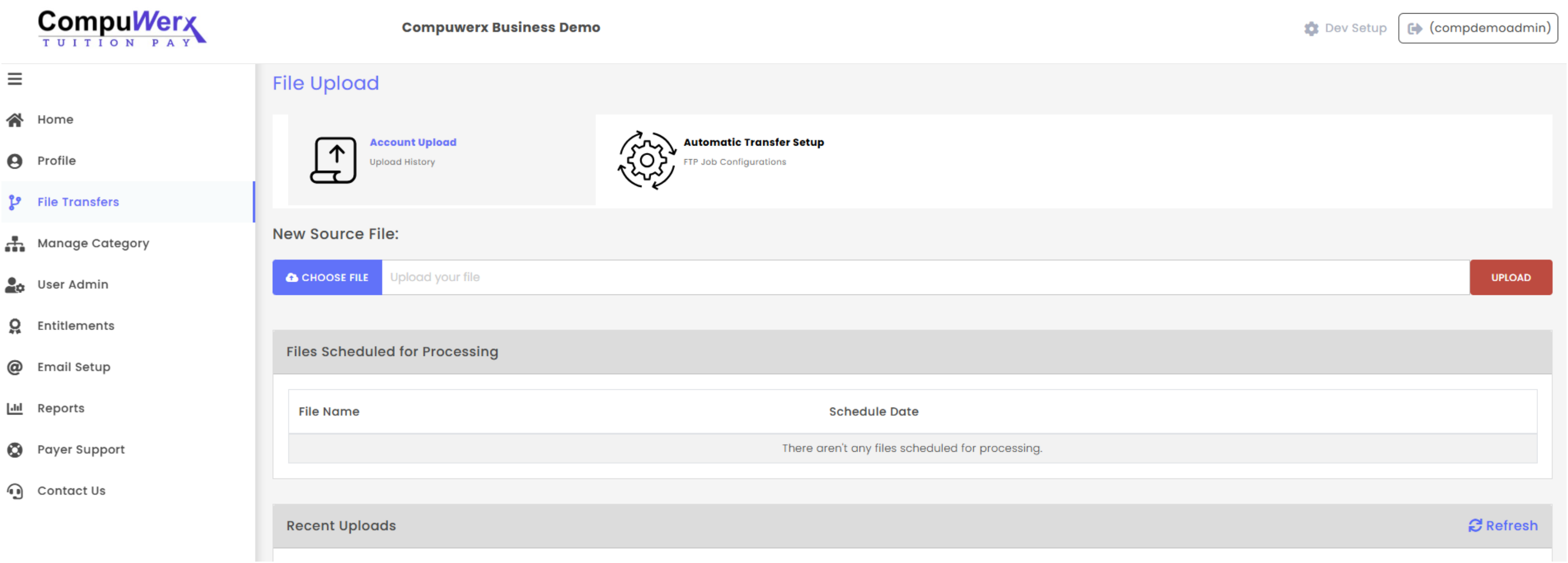
- The student has now been created in the system and can register a Profile against this account or an Admin can Make a Payment or Set Up a payment plan on their behalf.



ADMIN SITE

FILE TRANSFERS – ADDING NEW STUDENTS

- Admin navigates to File Transfers and selects Choose File to load in a bulk group of student data.
- The system will then prompt you to upload a file from your computer.
- Find the correct file and select Open and then Upload.



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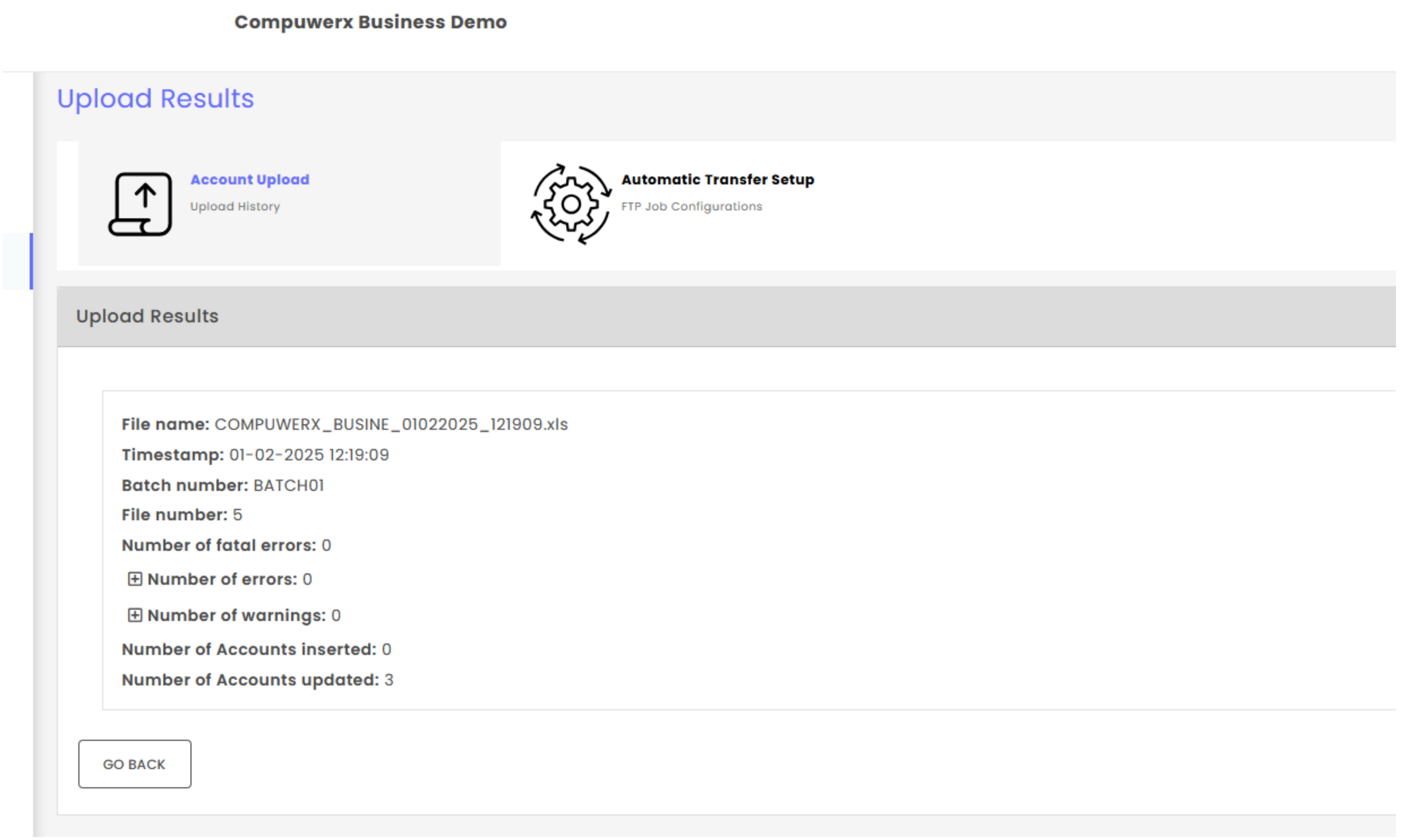
FILE TRANSFERS – ADDING NEW STUDENTS

- After Uploading hit the refresh button and then select your file to review the details.

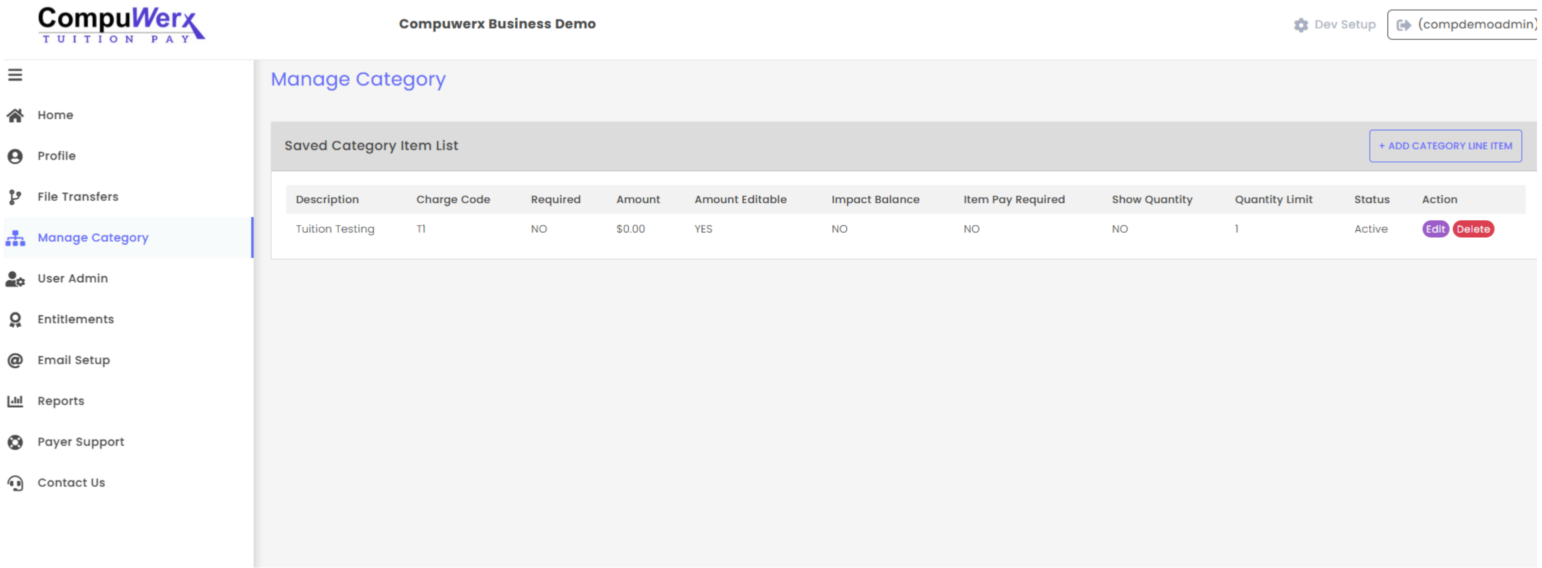
- From the Upload Results you can review the successfully loaded accounts.



ADMIN SITE

MANAGE CATEGORY

- Admin navigates to Manage Category on the lefthand taskbar.
- Admin can Add, Edit or Delete.
- Admin chooses + Add Category Line Item



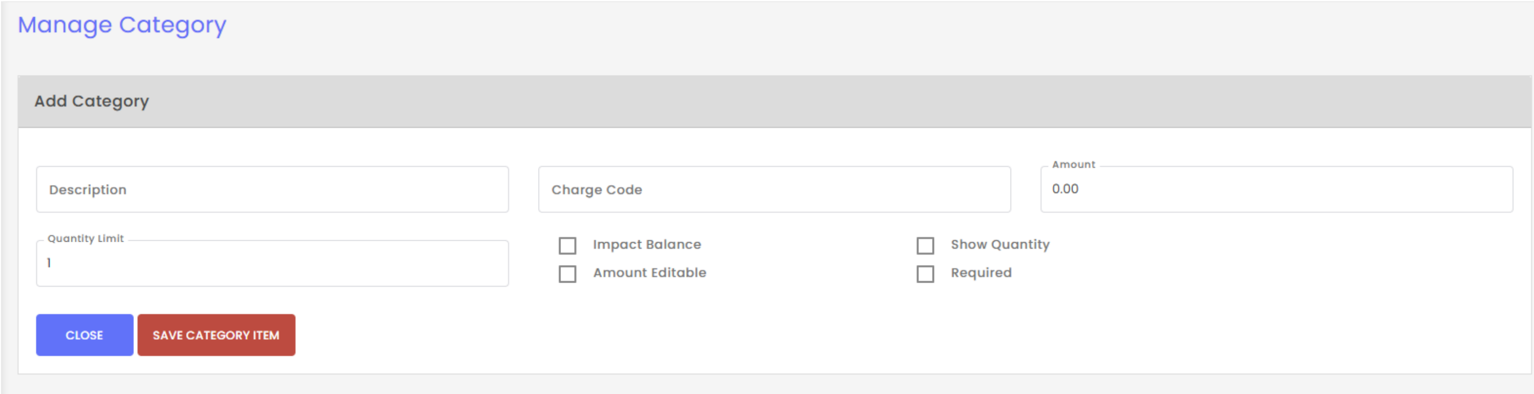
ADMIN SITE

MANAGE CATEGORY - ADD CATEGORY

- Admin adds Description, Charge Code (if needed), Amount (can be left as $0.00), Quantity Limit, and then selects optional check boxes.

- If Amount is left at $0.00 be sure to make Amount Editable.

- Admin selects Save Category Item once completed.



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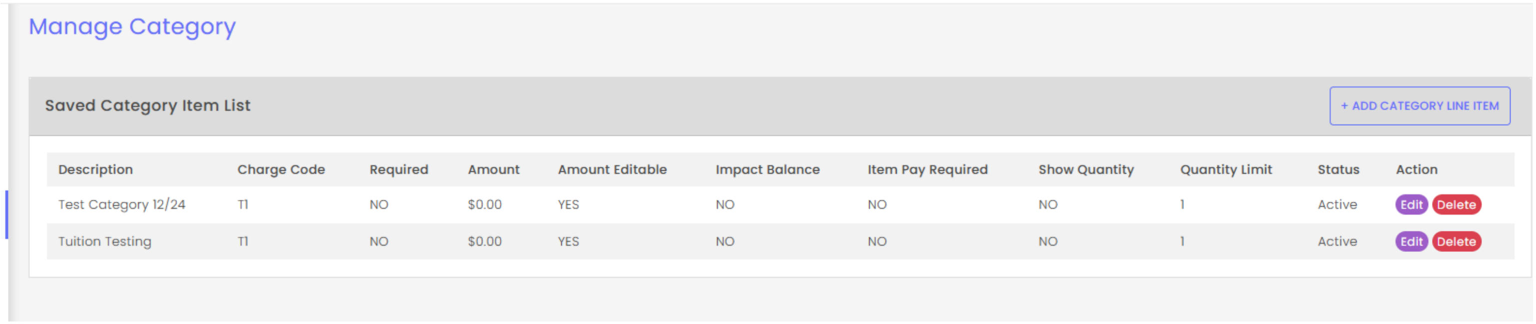
ADMIN SITE

MANAGE CATEGORY - ADD CATEGORY

- New category has been added.
- Admin can then make an edit, delete or add more categories if needed.
- All categories added here will be viewable to the Unenrolled or Enrolled payers on the payer site.



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ADMIN SITE

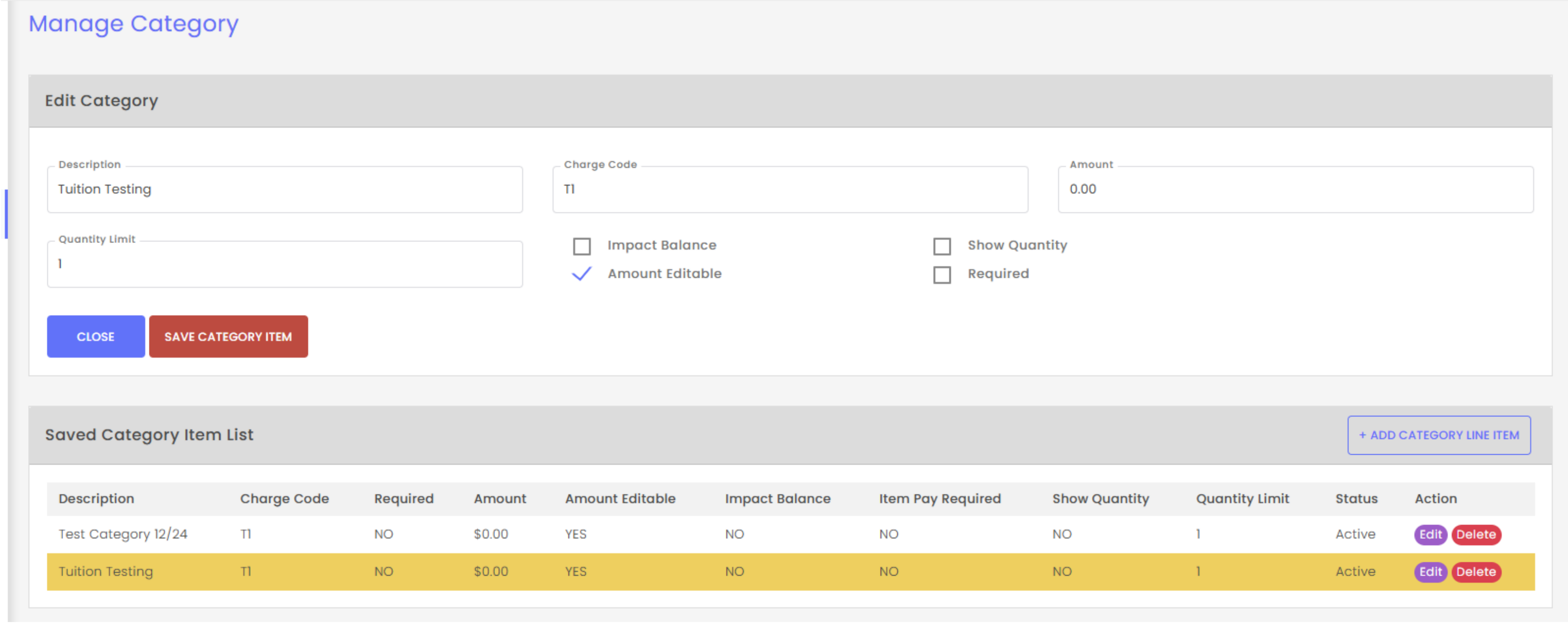
MANAGE CATEGORY - EDIT CATEGORY

- Admin chooses the Edit action item button.

- Category the Admin selected is now highlighted.

- Admin can now edit any of the fields and/or check boxes.

- Once edits are completed Admin hits Save Category Item or Close if not Edits are needed..



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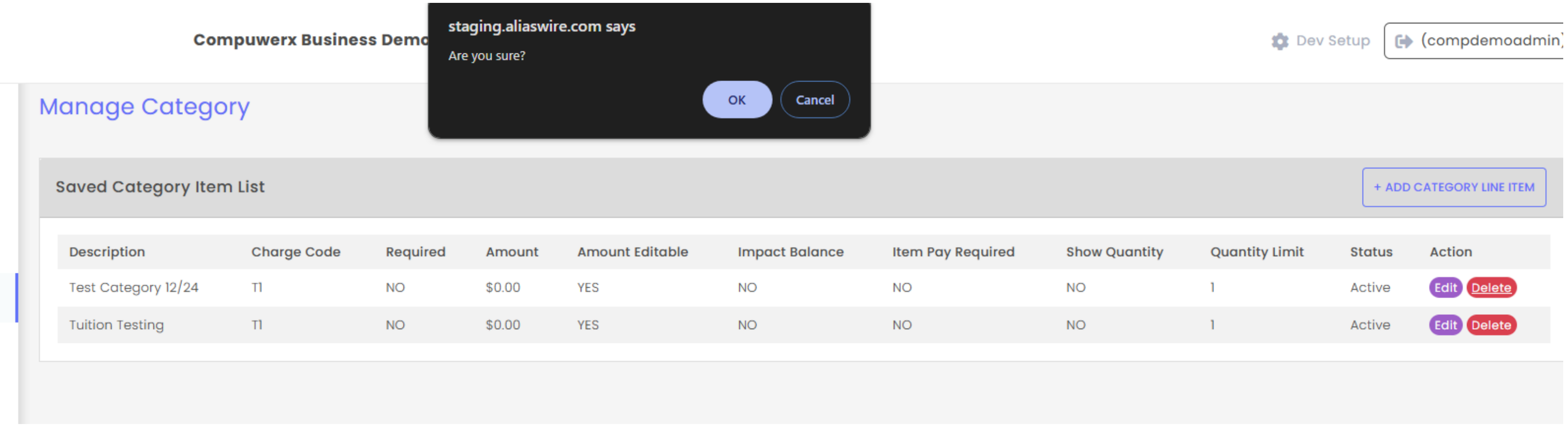
MANAGE CATEGORY - DELETE CATEGORY

- Admin chooses the Delete action item button.
- A popup action box now appears.
- Admin can confirm the Delete action by selecting Ok or Cancel to go back.



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