Getting Started with PaySimple

The following sections walk you through what you'll need to know and do to get started using PaySimple. When your account is first approved and enabled you'll log-in, and activate your Master Administrator User account. The first thing you'll see is the **Getting Started Dashboard,** which provides help with system functions. If you're planning to send invoices, follow the invoice configuration suggestions provided here to customize the system for your business and to enter your terms and conditions. The Quick Start Guides at the end of this document will help you quickly begin adding customers, collecting payments and sending invoices.

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Logging In for the First Time

The very fist time you access PaySimple you will be asked to create a User ID and password and to set three security questions. This section covers how to do this and provides detailed requirements for both User IDs and passwords in PaySimple. Additionally, the section provides information about User session time-outs, and the Master Administrator User that is created when your PaySimple account is enabled.

ABOUT USER IDS AND PASSWORDS

When your PaySimple account is first enabled, the Master Administrator User will receive an email providing a User Account Activation Link. When you click this link, you will be taken to a page that asks you to set your User ID, set a personal password, and configure three Security Questions. The User ID confirmed on this screen cannot be changed at a later date.

Additionally, each time you create a new User in your PaySimple account, the new User will receive an email providing a User Account Activation Link which they use to review their assigned User ID, set a personal password, and configure Security Questions.

User ID Requirements

Once a PaySimple User ID is defined, it cannot be changed. The Master Administrator User will create a User ID during the account activation process. Other Users have a User ID created for them when their User account is created in PaySimple, and can change the initial User ID during the activation process only. When creating a User ID it can be anything you like, provided it meets the User ID requirements outlined below.

User IDs must contain between 6 and 30 characters, all of which must be numbers, letters, periods, underscores or @ signs. For example, "janesmith" or "bob_27" or "you@yourcompany.com" or "g0br0wns" are all acceptable, but "sam" and "me&my#1fan!" are not. User IDs must be unique in the entire PaySimple system, so keep that in mind when creating them.

If you ever forget your User ID, you can ask any User on your account with and Administrator role to look it up for you. You can also call our Customer Care team at 800-466-0992 and we can retrieve it for you.

PaySimple

Password Requirements

The first time any User accesses PaySimple they will be asked to set a personal password. Additionally, every time a password is re-set the User will receive an email with a password reset link, and will use that link to set a new personal password.

Passwords expire every 90 days. PaySimple keeps track of when you last changed your password, and will prompt you to enter a new one when the old one expires. You cannot re-use the same password for 5 password cycles (and/or five times in a row, if you reset it more frequently than every 90 days). When you enter a new password, PaySimple validates that it has not been used within that time frame.

PaySimple Password Specifications

- Case sensitive

- Must be at least 8 characters (special characters are permitted)

- Must include at least one lowercase letter

- Must include at least one capital letter

- Must include at least one number

- Cannot contain your User ID

For example, "P4ssw0rd" and "S1lly_me!" and "goHOKIES1" and "Bob&Lisa4ever" are all acceptable passwords, but "password" and "A1b!" and "11111111" and "SAVEME!!" are not.

You can change your password at any time (see *How to Re-Set Your Password*)—and we encourage you to do this immediately if you think it has been compromised.

Each time your password is reset, regardless of method, an email will be sent to the address on record for the User ID.

If you receive this email and you did not reset your password, please contact PaySimple Customer Care immediately at 800-466-0992, as it is possible that your account has been compromised.
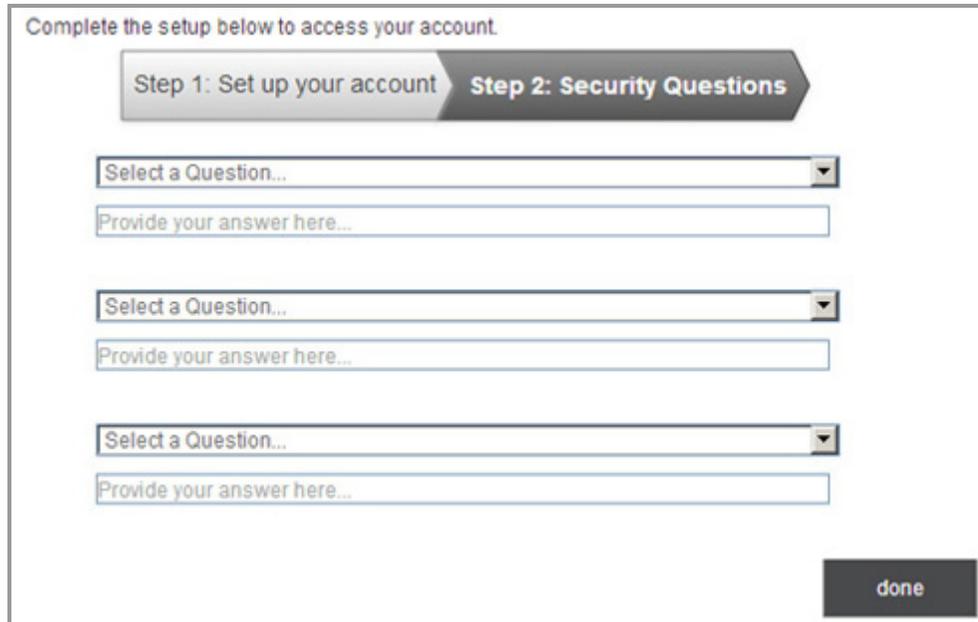
About Security Questions

Security Questions are used to enable Users to directly re-set a forgotten password from the Log-in screen. (See *How to Re-Set Your Password* for detailed instructions on how to use the Security Question as part of the password reset process.) They are also used to validate your identity when you first login from and unfamiliar IP address, and so that Customer Care personnel can validate your identity when you call to request assistance.

All Users will be prompted to set three Security Question during User account activation. You are required to set the Security Questions in order to successfully activate a User account.

To set your Security Questions, select one of the questions from the drop-down box then type your answer in the answer field.

Answers must be at least three characters and are not case sensitive. You cannot select the same security question more than once, and you cannot use the same answer more than once. For example if one security question is "what color is your house?" and another is "what color is your car?" you could not use the answer "blue" for both questions.
NOTE: All available questions are always displayed in all three drop-down boxes. If you select the same question more than once, you will see an error when you save your settings and be asked to select three unique questions.

Security Questions are also used to validate your identity when you login to PaySimple from an unrecognized IP address.

When you activate your User account the system will record your IP address. Subsequent access from this IP address will proceed normally. If you attempt to login from an IP address not associated with your User Record, you will be prompted to answer one of your Security Questions. After successfully answering the question, you will be logged in to PaySimple. You will not be asked to validate the next time you access PaySimple from that IP.

You can change your Security Questions as often as you like from the **Settings--> Configuration--> Account Access** screen. (See *Managing Your Security Question in Chapter 8* of the *PaySimple User Guide* for instructions on how to do this.) If you believe any of the questions have been compromised, it is very important that you change them all, and that you change your password, immediately.

> **For users assigned the standard User role, or assigned any custom role that does not provide access to the Settings center, an "*Account Access*" link will be placed in top-navigation. Clicking this link opens the Account Access screen.**
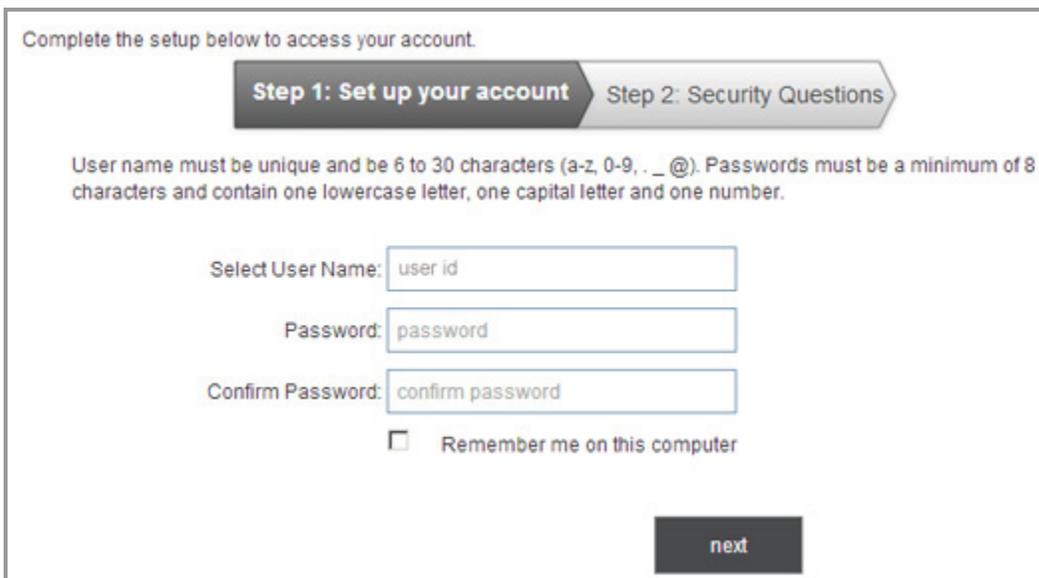>
> Welcome Sally Sample | Account Access | User Guide | Contact Us | Logout

Your First Log-In

Every new User receives an email providing a User Account Activation Link. Use the link in the email to activate and configure your account.

1. Click the link in the Email.

2. The **Account Setup** screen opens with **Step 1: Set up your account**, active.

Complete the setup below to access your account.

> Step 1: Set up your account > Step 2: Security Questions

User name must be unique and be 6 to 30 characters (a-z, 0-9, . _ @). Passwords must be a minimum of 8 characters and contain one lowercase letter, one capital letter and one number.

Select User Name: [user id]

Password: [password]

Confirm Password: [confirm password]

☐ Remember me on this computer

[next]

3. Review the **User ID,** and make changes if desired, making sure it adheres to *User ID Requirements*.
   NOTE: The Master Administrator User will need to enter an ID in the blank **User ID** field.

4. Enter a password, making sure it adheres to *Password Requirements*, in the **Password** field.

5. Re-type the password in the **Confirm Password** field.

6. Check the "Remember me on this computer" box to set a cookie on your computer that will automatically auto-fill your User ID each time you access the PaySimple login screen.
   NOTE: This is an optional step. If you check the box now, you can remove the remember me cookie by unchecking the box on the PaySimple login screen. (See *the note below*.)

![PaySimple]

7. Click the "next" button.
NOTE: If there are any errors in Step 1, for example if the **Password** and **Confirm Password** field do not match, you will see an on-screen error. Correct the problem and click "next" again.

8. The **Step 2: Security Questions** screen opens.

9. Select a question from the first **Security Question** drop-down box and type the answer to the question in the first **Security Answer** field.
NOTE: The answer is not case sensitive.

10. Select a question from the second **Security Question** drop-down box and type the answer to the question in the second **Security Answer** field.

11. Select a question from the third **Security Question** drop-down box and type the answer to the question in the third **Security Answer** field.

12. Click the "done" button to record your questions and answers, and activate your account.
NOTE: You are required to select three unique questions and provide three unique answers. If you do not, you will see an on-screen error message. Correct the problem, then click "done" again to activate your User account.

13. You will be logged in to PaySimple and shown the Dashboard.

The next time you log-into PaySimple, use the User ID and Password you just set.

NOTE: You can review and change your security questions and password from the **Settings-->Configuration -->Account Access** screen. (See *Account Access in Chapter 8* of the *PaySimple User Guide* for instructions on how to do this.)

![PaySimple logo]

> If you do not check the "Remember me on this computer" box when you account is initially activated, you can set the remember me cookie from the PaySimple login screen at any time. To do this, check the "Remember my user ID" box. You can uncheck the box from the login screen at any time to remove the cookie and clear your User ID for future logins.

How to Re-Set Your Password

You can easily reset your own password from the ***Settings--> Configuration--> Account Access*** screen while logged in to PaySimple. If you forget your password, you can re-set it from the log-in screen if you have configured Security Questions. (See *About Security Questions* above for instructions.)

It is important that you re-set your own password if you have forgotten it. After 5 unsuccessful attempts to log-in to PaySimple your account will be locked, and you will need to have an Administrator for your account re-set it. Master Administrator users who get locked out will need to contact PaySimple Customer Care to unlock the account.

Resetting Your Password from the Account Access Screen

1. Click the "Settings" link in top-navigation.
   NOTE: For users assigned the standard User role, or assigned any custom role that does not provide access to the ***Settings*** center, an "Account Access" link will be placed in top-navigation. Clicking this link opens the ***Account Access*** screen.

2. Click the "Configuration" tab.

3. Click the "account access" link in the **ADDITIONAL OPTIONS** section at the bottom of the page.

4. Go to the **Change password** section at the bottom of the screen.

5. Enter your current password in the **Old Password** field.

6. Enter a new password in the **New Password** field.
   NOTE: Remember that passwords must be at least 8 characters; contain at least one capital letter, one lowercase letter, and one number; cannot contain your User ID; and cannot be repeated for 5 password cycles. If you enter an invalid password, the system will display an error.

7. Re-type the new password in the **Confirm New Password** field.

8. Click the "save password" button.

9. A success message will be displayed at the top of the section confirming that the password has been changed. The next time you login to PaySimple use the new password you just set.

10. You will receive an email confirming that your password has been reset. You don't need to do anything else.
    NOTE: If you receive this email and you **HAVE NOT** just re-set your password, please contact PaySimple Customer Care immediately. It is possible that your account has been compromised.

You can change your password as often as you like. If you believe it has been compromised, be sure to re-set it immediately. It is also a good idea to re-set your Security Questions if you believe your password has been compromised.

Resetting a Forgotten Password
You will need to know your User ID and the exact First Name and Last Name for your User in order to re-set your own password. If you do not know this information, ask any Administrator User on your account to look-up this information for you. You can also contactPaySimple Customer Care for assistance.

Follow the steps below to re-set a forgotten password:

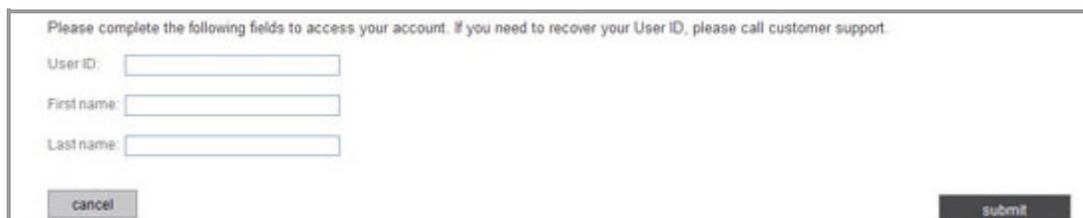1. Click the "forgot password?" link from the **Log In** screen, as shown:
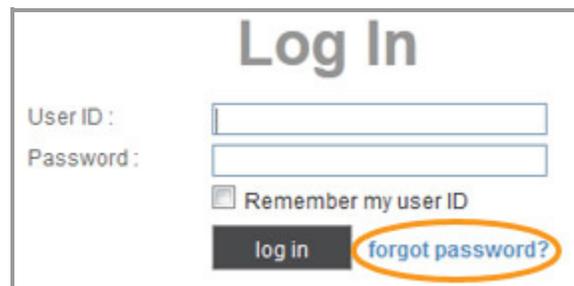
2. The reset qualification page appears. Enter your **User ID**, **First Name** and **Last Name** exactly as they are saved for your User Record. Then, click the "submit" button.
    NOTE: If there is an error with any of the fields, the system will display an error message at the top of the screen. You will not be able to proceed unless the values entered in these fields exactly match those stored in the system. (The fields are not case-sensitive.)

3. One of your three security questions will be shown at the top of the next screen. Enter your answer in the **Security answer** field. Click the "submit" button.
NOTE: If there is an error the system will display an error message at the top of the screen. You will not be able to proceed unless the **Security answer** you entered exactly matches what is stored in the system. (The field is not case-sensitive.) The system will continue to present you with the same security question if you get it wrong, it will not switch to one of the other questions.

4. You are now prompted to create a new password. Enter the new password in the **Password** field, then type it again in the **Confirm password** field. Then click the "log-in" button.
NOTE: Remember that passwords must be at least 8 characters; contain at least one capital letter, one lowercase letter, and one number; cannot contain your User ID; and cannot be repeated for 5 password cycles. If you enter an invalid password, the system will display an error.
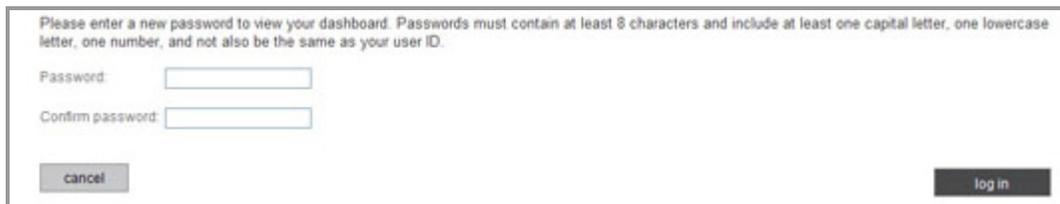
5. Your new password is saved and you are taken to your PaySimple Dashboard. Use the new password you just created the next time you log-in.

6. You will receive an email confirming your password has been reset. You don't need to do anything else.
NOTE: If you receive this email and you **HAVE NOT** just re-set your password, please contact PaySimple Customer Care immediately at 800-466-0992. It is possible that your account has been compromised.

If you are unable to re-set a forgotten password yourself, either because you have not yet set Security Questions, or if your account is locked-out, it can still be reset with a password change email.

Any Administrator User can reset a password using the "reset password" link from the Edit User screen. (See *Reset Passwords for Users in Chapter 8* **of the** *PaySimple User Guide* **for instructions.)**

ABOUT USER SESSIONS AND TIMEOUTS

There are no limits on how long you can remain logged into PaySimple so long as you are actively using the system. After 15 minutes of inactivity you will be logged-out for security reasons.

One minute before you will be logged out you will see a **Session Timeout Notification** window, as shown below. It will count down 60 seconds. During that 60 seconds you can click the "Continue Working" button to resume your PaySimple session from where you left off. You can also click the "Logout" button to immediately end your session. After the 60 seconds has expired, the window will close and you will be logged out of PaySimple
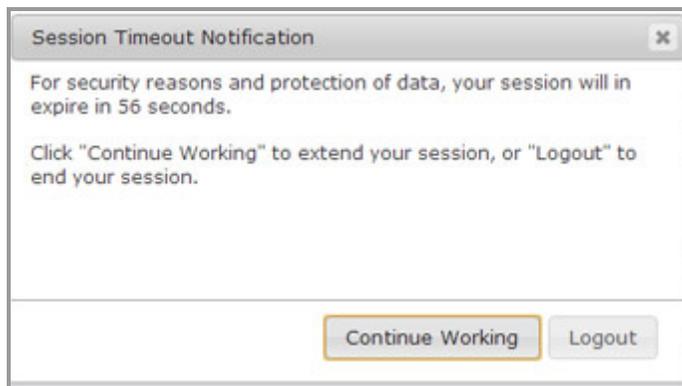
Once logged out, you are returned to the PaySimple **Log in** screen. When this happens, simply enter your User ID and password to login again.