Fi-Soft Merchant Edition SP FAQ/troubleshooting

My user name is gone from the User Configuration pull down menu. How do I get it back?

This occurs when an incorrect PIN has been used 3 times for a particular user. It is a security feature. Please do the following:

1. In QB go to Customers pull down menu > Fi-Soft Merchant Edition SP > Fi-Soft Merchant Edition Portal. A web browser will open. You need to login with your Fi-Soft Admin credentials (not your user level credentials).

2. Once logged in, select the Manage Users tab. Place a check mark next to the missing name and click on the "Active User" icon at top. Their status column should change to "Active".

3. Restart QB and the name should be in the pull down.

How to resend a User level PIN:

To resend a User PIN, please do the following:

1. 1. In QB go to Customers pull down menu > Fi-Soft Merchant Edition SP > Fi-Soft Merchant Edition Portal. A web browser will open. You need to login with your Fi-Soft Admin credentials (not your user level credentials).

2. Once logged in, click on the Manage User Tab on left. Place a check mark next to the name you want to send the PIN number to. At the top of the screen, click on the Resend Mail button (last button on right).

3. The system will email a copy of the Users PIN to them. If it does not show up, make sure to have them check in their junk mail folder or their spam filter.

How to add a Fi-Soft user account:

1. In QB go to Customers pull down menu > Fi-Soft Merchant Edition SP > Fi-Soft Merchant Edition Portal. A web browser will open. You need to login with your Fi-Soft Admin credentials (not your user level credentials).

2. Once logged in, select the Manage Users tab. Click on the Add User icon at top.

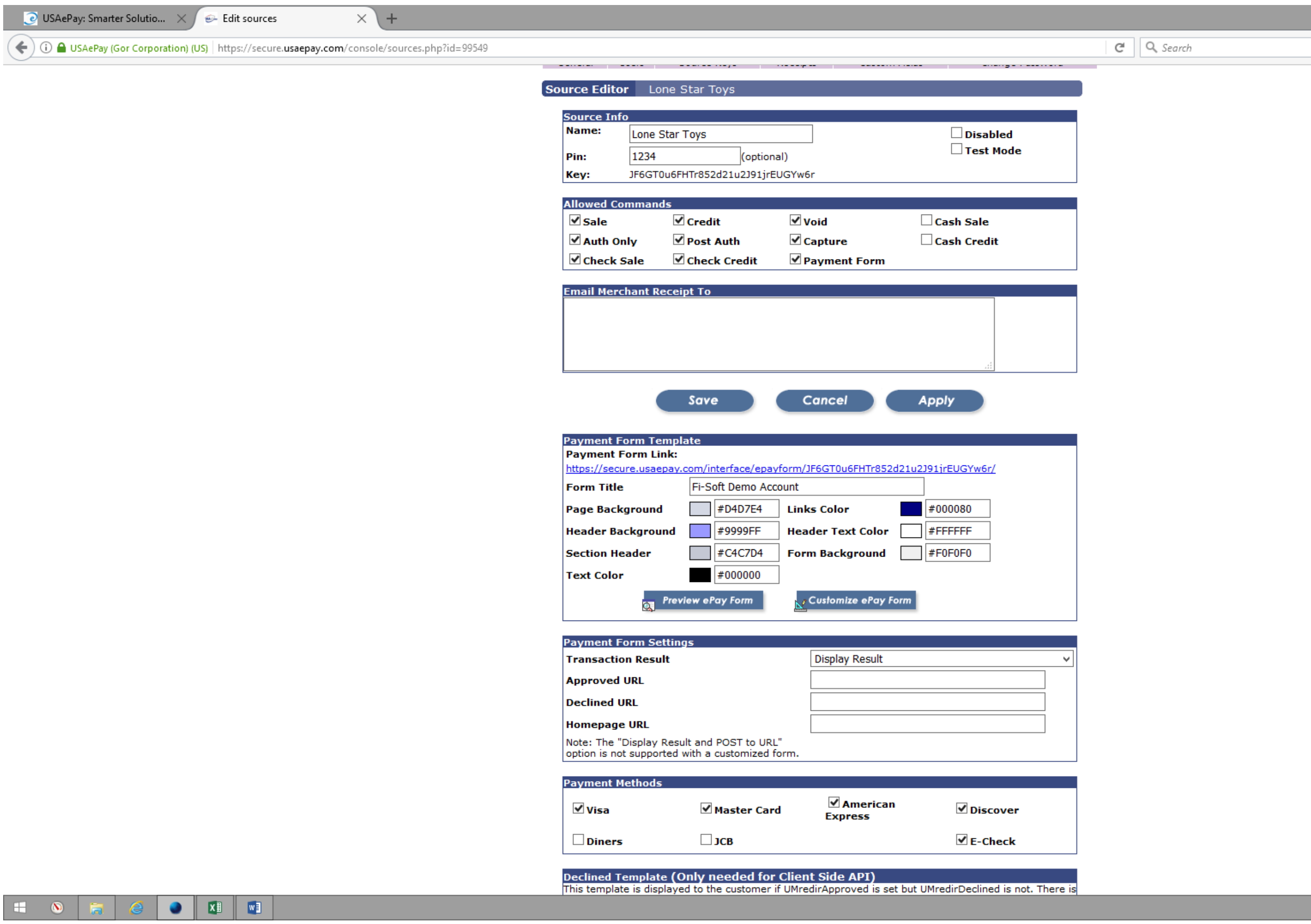
3. Fill in the first line with the first name of the new user. Skip the second line (asking for a mobile number). In the third field type in the email address for the new user and click the add button.

4. The system will email user credentials and pin to the new user. If it does not show up, please have them check their junk mail folder or spam filter.

5. You will need to restart QB for the new Fi-Soft user to be added to the list.

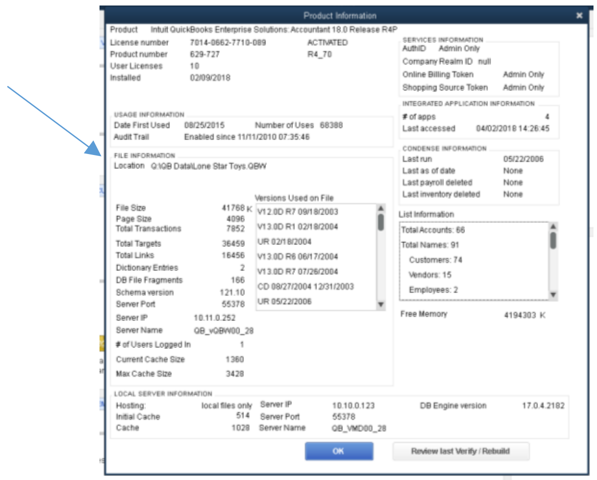
USAePay Payment Form Not Setup Correctly

Check the payment form and make sure it matches the settings below:



Checklist before upgrading QB

1. Open your existing QB file and press the F2 key on your keyboard. This will open the QB Product Information Screen



2. Copy the existing network path show in the location field.
3. Open the new/updated copy of QB, press the F2 key and compare the network path. It must match the original one EXACTLY (including file name, capital letters, spacing, etc…).