Self-Paced Online Payment Portal (PayZang) Training Guide

This guide is to provide information in navigating the State of Montana Online Payment Portal (NMI), which is provided by PayZang. Not all sections will apply to all Online Payment Pages (OPPs) depending on enabled features, such as credit/debit cards and/or ACH (electronic checks). To gain access to the NMI portal, please open a case with the SITSD Service Desk.

Standalone Payment Configuration

There are several configuration options for standalone payment solutions. If you have a standalone OPP, you can watch this seven-minute video to view the options.

Acknowledging Payment Agreement

Users will be required to acknowledge the agreement when making payments through the portal. For state employees who accept payments over the phone using the payment portal, you will also be required to acknowledge the agreement on behalf of the customer. However, there is no need to read the user agreement to customers over the phone as it is not a federal or state requirement.

Voiding Transactions

To void a transaction, first login to the NMI Portal. Transactions can be voided only if they have not been submitted tot eh payment processors which happens every day at 5pm MST. For more information, you can watch this three-minute video.

1. Navigate to **Transaction Reports** on the left-hand menu near the bottom,
2. Select the **Show Today's Transactions** button to the right of the "**Search Transactions**" title,
3. Select the ID link (the third column in blue) for the appropriate transaction,

4. Select the **Void** Button,
5. The Void Transaction page is displayed with the Transaction ID,
6. Select **Void** again, the transaction is now Voided.

Refunding Transactions

To refund a transaction, first log into the [NMI Portal](). Transactions can be refunded at any time. Transaction and merchant fees apply. For more information, you can watch this [three-minute]() video.

1. Select the **Credit Cards** or **Electronic Check** menu on the left at the top to drop down the list,
2. Select **Refund**,
3. Enter the Transaction ID or use the search icon to find the transaction,

Transaction Information

Transaction ID ✱	Amount ✱
🔍	$

4. Enter the amount to be refunded,
5. Select the Refund button.

Chargeback Process

To view a charge back, first log into the [NMI Portal](). Charge backs happen when the purchaser disputes a charge. When a charge is disputed, SITSD will receive an email and will then contact the administrator for the merchant account. You should continue to use the same process currently in place to deal with charge backs.

Here is how you can view any charge backs:

1. Navigate to **Transaction Reports** on the left-hand menu near the bottom,
2. In the "Search Transactions" section, go to **Action Type** and drop down the list,
3. Select **Returns/Chargebacks**,
4. Select a date for **Start Date** and **End Date** at the bottom of the section,
5. Select **Submit**.

Transaction Reports

To view reports, first log into the NMI Portal. Not all information will be available in the NMI reports, however, all information is available in the Custom Reports which are discussed in the next section. For more information, you can watch this nine-minute video.

1. Navigate to **Transaction Reports** on the left-hand menu near the bottom,
2. At the top, enter the appropriate **Group By**, **Start Date**, and **End Date**,
3. Select the **Submit** button or scroll to the "**Search Transactions**" section,

4. In the "**Search Transactions**" section enter the appropriate search criteria,

5. Select the **Submit** button,
6. Once the report is displayed, the data can be downloaded to Excel or CSV,

7. Note that the downloaded data will contain more columns than displayed on the screen based on the Format selected.

Custom Reports

SITSD has developed custom reports that can be found at https://payzangreports.mt.gov. Permissions for state agencies are controlled through Active Directory. Permissions for non-state agencies are controlled through Okta.

1. Agency will create an active directory group which will start with the agency 3 letter acronym followed by a space and then "**PAYZANGREPORTS**" followed by a space and another descriptor. For example, access to the SECGC reports would be granted by using the Active Directory group **DOA PAYZANGREPORTS SECGC**.
2. Once the agency has created the Active Directory group and has added users to that group, they enter a case into ServiceNow with the group name and the URL of the payment page for which that group should be granted permission.
3. Agency then maintains adding/removing users from the Active Directory group based on the needs of the agency.

Sample Report (DRAFT)