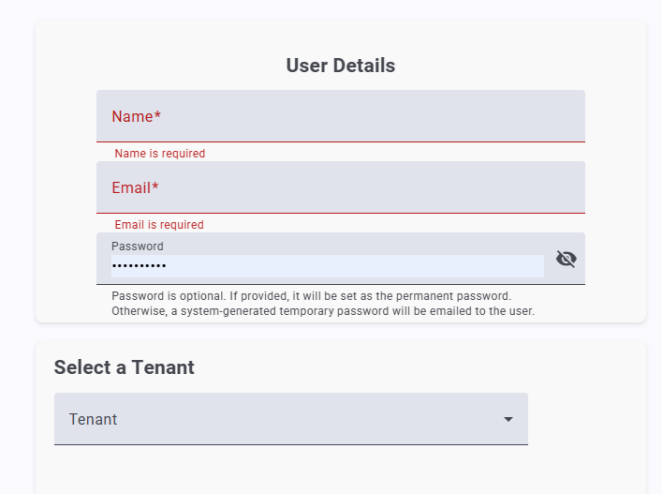
Merchant Portal Guide

Access the new Merchant Portal here: https://portal.myterminals.cloud/

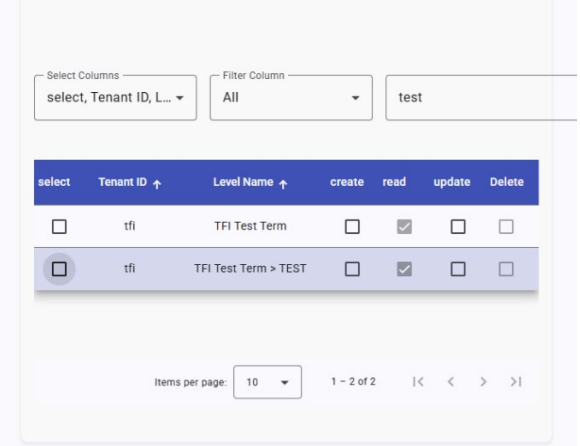
You have 2 tabs to choose from (Level-Management and Portal-Users). The portal users tab allows for the creation of additional credentials for users with the necessary permissions to do so. To create a new user for your organization, click on the “Create User” link in the upper right of the Portal Users screen.

Creating Users

1. Type in the user’s name, email address, and a default password (If you do not enter a password the system will automatically generate a temporary password and email the user with a link, this link may show up in their junk/spam folder). **Usernames can only contain alphanumeric characters**
2. Click the drop down “Tenant” box and select TFI

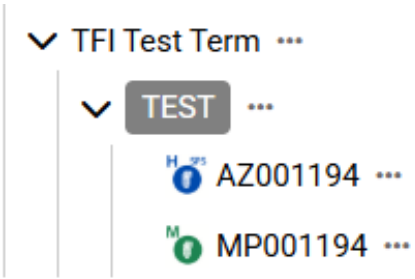


3. Scroll down and select the folder that you want them to have access to. If you want to give them permission to create and update folders click the create box for that folder.

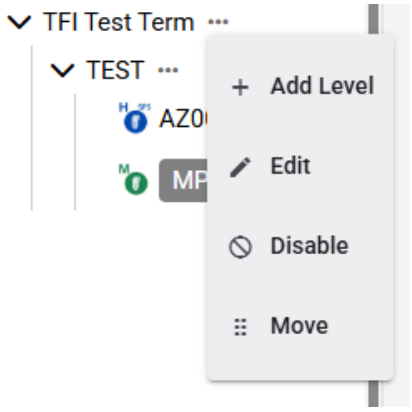


Folder Structure

Each folder contains 2 terminal IDs for every terminal in a location. There is a green terminal and a corresponding blue terminal. Terminals that have the same last 6 numbers represent the same terminal in a location. The green terminal is the live transaction terminal, whereas the blue terminal represents terminal settlement data that is sent nightly from processors.



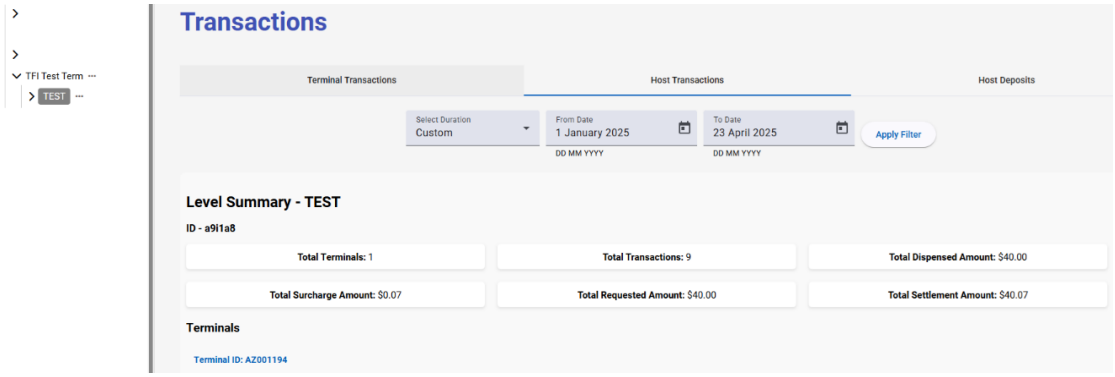
Folders can be created and edited by clicking on the "..." at the end of each folder. A window with options to add, edit, or move levels will appear for users who have permission to. You can create sub folders and move terminals to those folders if needed. If you are disabling level folders you must disable all nested folders prior to disabling that folder.



Understanding Transaction Tabs

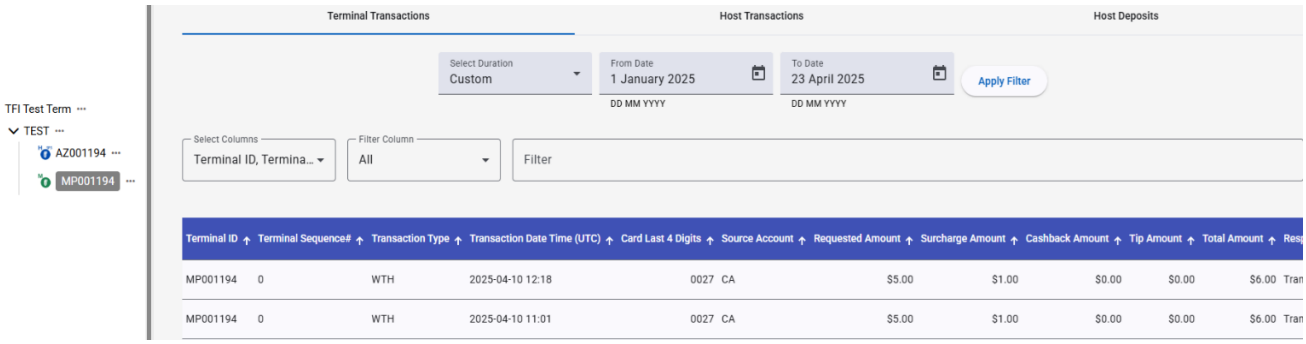
Each Merchant level folder consists of 3 reporting tabs (Terminal Transactions, Host Transactions, and Host Deposits).

Level Summary shows high level information such as # of terminals, total transactions, total dispensed amount, total surcharge amount, total requested amount, and total settlement amount based on the date filters set.



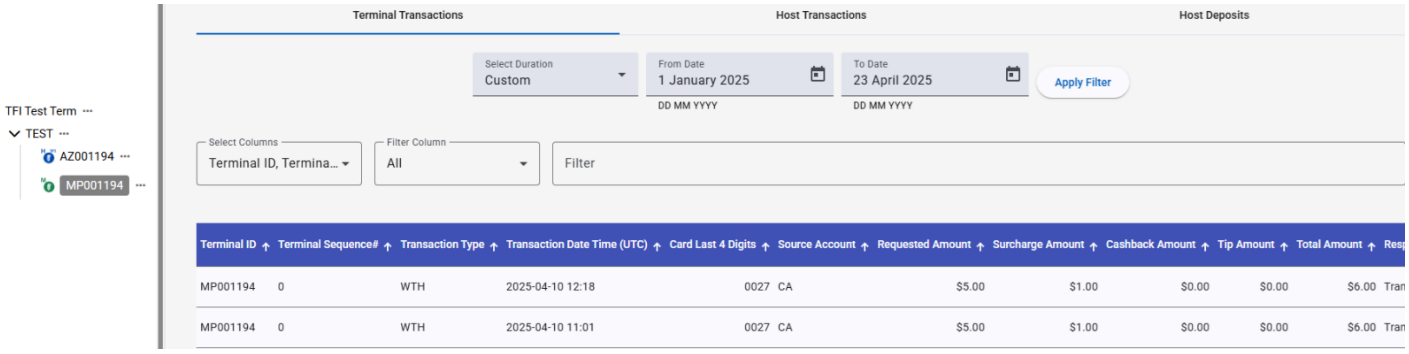
Terminal Transactions shows transactions reported from the terminals themselves. This gives a user the ability to see successful and declined transactions. The portal records transactions up to a minute from when they occur.

To view these transaction reports, you will need to first select the green version of the terminal you want to look at then click the Terminal Transactions tab. You can filter dates as needed and will be able to see terminal sequence #, serial #, transaction type, transaction date/time, last 4 of card, source account, requested amount, surcharge, cash back amount, tip amount, total amount, transaction status and response description. This report can be exported as well using the export link in the upper right of the window.



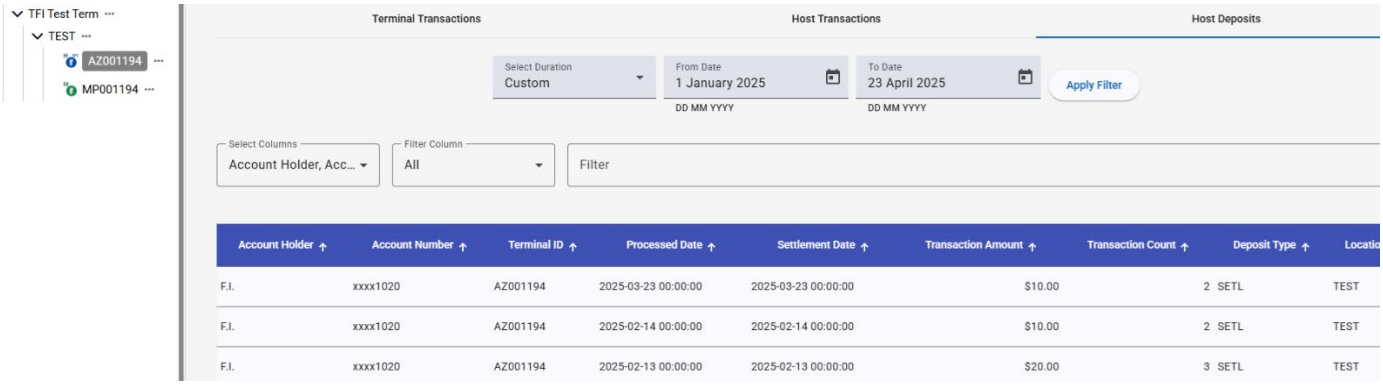
Host Transactions shows successful transactions that have been settled and are set for deposit. This gives the user the ability to see successful transactions from as early as the previous day.

To view these transaction reports, you will need to first select the blue version of the terminal you want to look at then click the Host Transactions tab. You can filter dates as needed and will be able to see terminal sequence #, serial #, transaction type, transaction date/time, last 4 of card, requested amount, surcharge, dispensed amount, and settlement amount. This report can be exported as well using the export link in the upper right of the window.



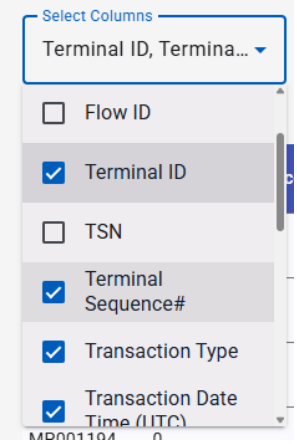
Host Deposits shows deposit history for settlement and surcharge. This tab will reflect the deposit history of transactions that are found on the Host Transactions tab.

To view these transaction reports, you will need to first select the blue version of the terminal you want to look at then click the Host Deposits tab. You can filter dates as needed and will be able to see account name, last 4 of account, terminal ID, processed date, settlement date, transaction amount, transaction count, deposit type, and location. This report can be exported as well using the export link in the upper right of the window.



Filtering Data

You can filter report columns to suit your needs, adding or removing desired columns from the report by clicking the “Select Columns” box and adding or removing check boxes from the columns you choose. The portal will remember these selections for the next time the user logs back in.



The “Filter” box is useful for finding transaction data by typing in anything relevant to the transaction such as amount or last 4 of card. The portal will search for any data that contains what is typed into the box.

