

# Portal Access User Guide

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This training document outlines how to use the Portal Access Salesforce Application from POS Portal, Inc.

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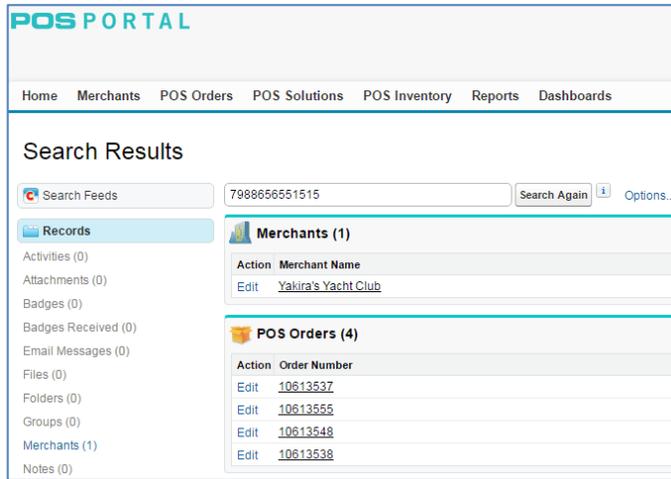
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## Introduction

POS Portal has created a Salesforce application (managed package) called Portal Access. This application, which is privately listed on the Salesforce AppExchange, brings Merchant Control Center functionality directly into your Salesforce org.

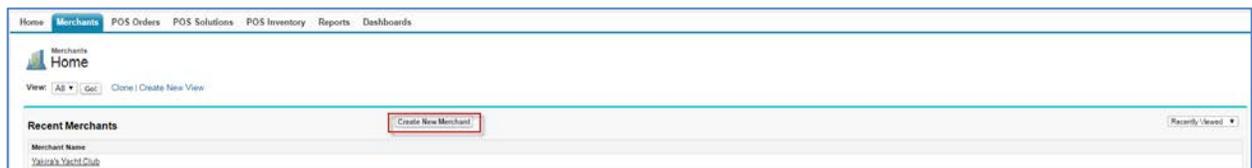
## Locating a Merchant

Every order must be initiated from a Merchant. A Merchant record can be located by searching for the Account Number (MID) or another unique identifier like the merchant's name, phone number or email address.

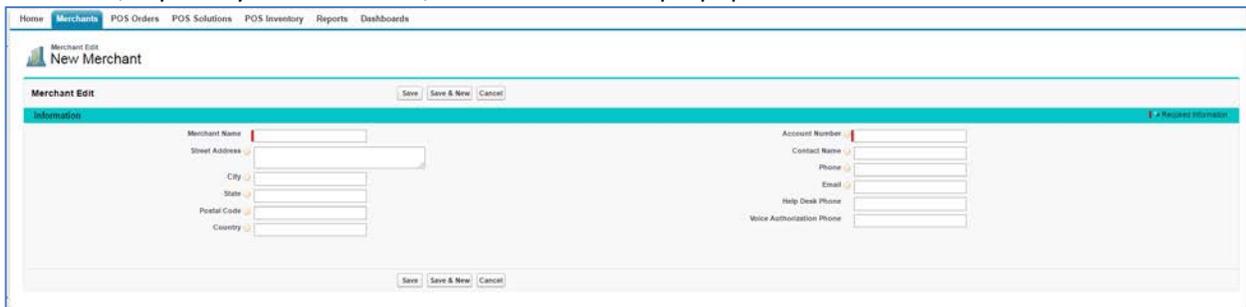


## Creating a Merchant

If a Merchant record does not exist in the Salesforce community, a new Merchant will need to be created. To create a new Merchant, click on the Merchants tab, and click Create New Merchant.



Populate all required and as many optional fields as possible, and click Save & New to create another Merchant or Save if you're finished. It is advantageous to populate as many fields as possible on the Merchant, especially street address, as these fields will prepopulate on new orders.



## Locating a POS Order

You can locate an order by a) searching for the order number, or b) locating the Merchant where the order was placed and finding the POS Orders related list.

**Search Results**

Search Feeds: 10613537 Search Again Options...

**Records**

- Accounts (0)
- Activities (0)
- Attachments (0)

**POS Orders (1)**

Action	Order Number
Edit	10613537

**Merchant**  
Yakira's Yacht Club

Back to List: Merchants

**Merchant Detail**

Merchant Name: Yakira's Yacht Club  
 Street Address: 180 PROMENADE CIR  
 City: SACRAMENTO  
 State: CA  
 Postal Code: 95834  
 Country: US

Created By: Christianna Ripley, 1/26/2018 5:42 PM

**POS Orders**

Action	Order Number
Edit	10613537

Either way, once you have located the order record, click on the order number to view the order.

**Order No. 10613537**

**Order Details**

Merchant Name: Yakira's Yacht Club  
 Shipping Address: 180 PROMENADE CIR  
 City, State, Zip: SACRAMENTO, CA 95834  
 Country: US  
 Deployment Project:  
 Shipping Service Level: FedEx First Overnight (By 8:30am)

Account No.: 7988855551515  
 Reference No.:  
 Care Of: Yakira Johnson  
 Phone: (555) 555-5555  
 Email: cripley@posportal.com  
 Memo:

[Initiate Credit Request](#)

Item Description	Serial Numbers	Manufacturer	Mfg Part Number	Part ID	Lot Quantity	Lot Type	Price	Order Quantity	Shipped Quantity	Extended
VPN, Vx520, v3.2, 10/2Mb, Dual Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless, New		VeriFone	M252-853-AD-NAA-3	128339	1	Ea.	\$114.00	1	0	\$114.00
- Device Configuration - Terminal Programming		Other		101306	1	Ea.	\$5.75	1	0	\$5.75
- Device Configuration - Terminal Programming		No Manufacturer		128150	1	Ea.	\$0.00	1	0	\$0.00
- Device Configuration - Terminal Programming		No Manufacturer	VTR014	128155	1	Ea.	\$0.00	1	0	\$0.00
- Device Configuration - Terminal Programming		No Manufacturer		128156	1	Ea.	\$0.00	1	0	\$0.00
- Device Configuration - Injection		Other		101367	1	Ea.	\$3.45	1	0	\$3.45
- Device Configuration - Terminal Programming		Other		101366	1	Ea.	\$5.75	1	0	\$5.75
- Sticker: Terminal (EDC)		No Manufacturer	101942-POD	101942	1	Ea.	\$0.92	1	0	\$0.92
- Device Configuration - Test Transaction, Visa		No Manufacturer		112957	1	Ea.	\$2.88	1	0	\$2.88
- Device Configuration - Test Transaction, Debit		No Manufacturer		112950	1	Ea.	\$2.88	1	0	\$2.88

Method of Payment: Terms - Net 30  
 Order Status: Open  
 Order Classification: Equipment Purchase  
 Order Method: Portal Access  
 Order Date: 1/27/2018 2:59 PM  
 Ship Date:

Subtotal: \$137.13  
 Freight: \$0.00  
 Handling: \$6.20  
 Tax: \$10.74  
 Order Total: \$154.07  
 Ordered By: Christianna Ripley

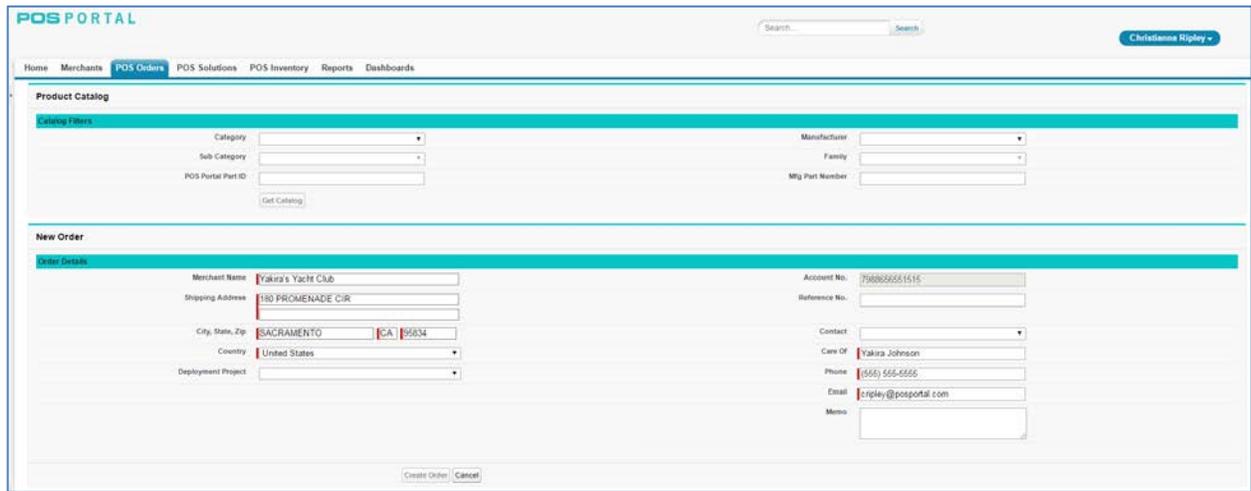
[Cancel Order](#) [Back to Account](#)

The order view shows all the details of an order, including serial numbers, tracking numbers, and delivery status. Orders that have already been submitted to POS Portal appear as read-only.

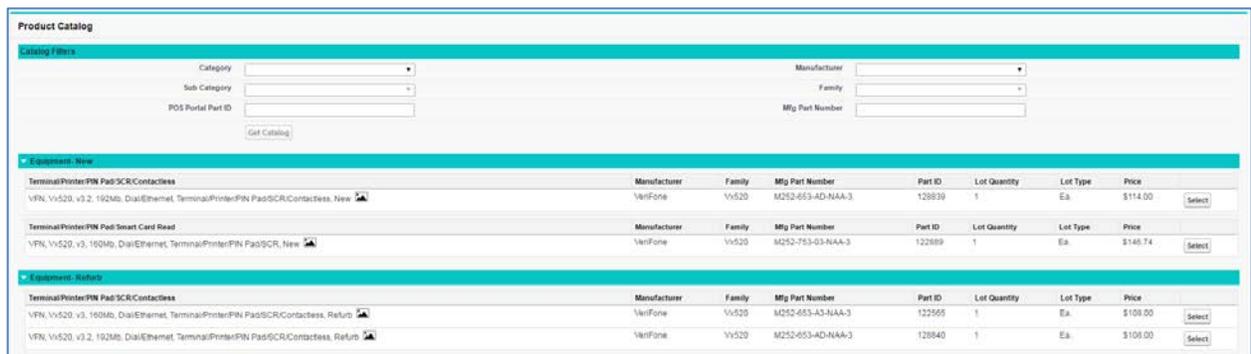
Clicking on the icon next to the product description will display an image for that part if one exists. From here, a full-size product image can also be displayed in a new window.



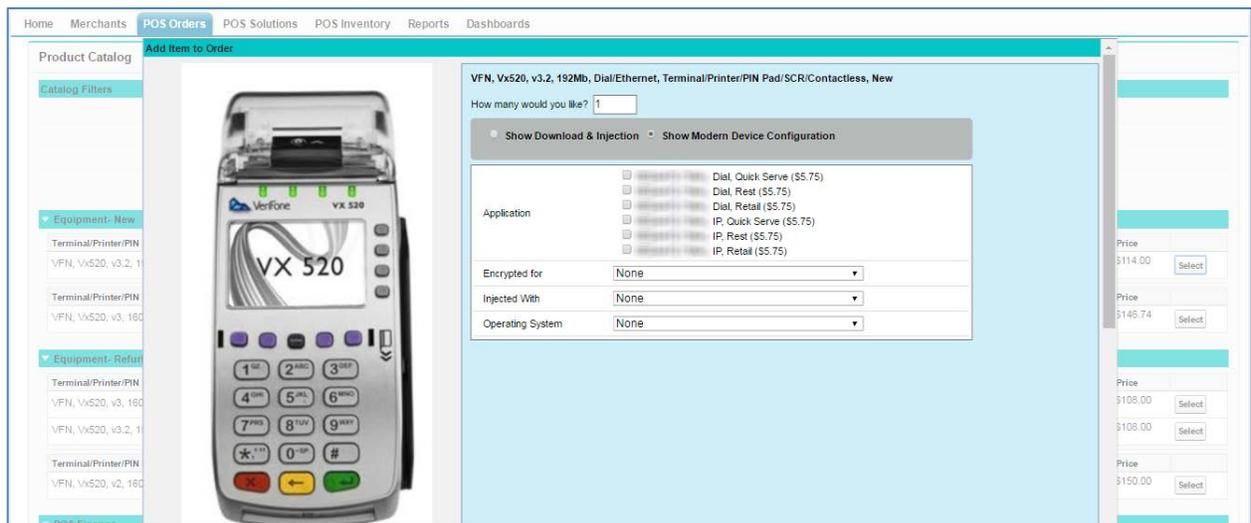
When an order is initiated, a one-page new order interface is displayed.



At the top of the page are the Catalog Filters. Select one or many filters to refine your catalog by a single product or product suite. Once listed, products can be selected to be added to the order.



A selected product will appear in a pop out window. An image of the product will be displayed if available. Quantities & configuration can be added at this time as needed.



If POS Portal has certified both Legacy and Modern device configurations for a given product, radio buttons will be displayed at the top of the Add Item to Order window. Choose either the Show Download & Injection for Legacy configurations or Show Modern Device Configuration for Modern configurations. You must choose only one type of configurations for a given product, as indicated by the radio buttons. In other words, you may not select a combination of Legacy and Modern device configurations for the same order item or product. If you're unsure whether you should be ordering Legacy or Modern device configuration, please contact your Account Manager.

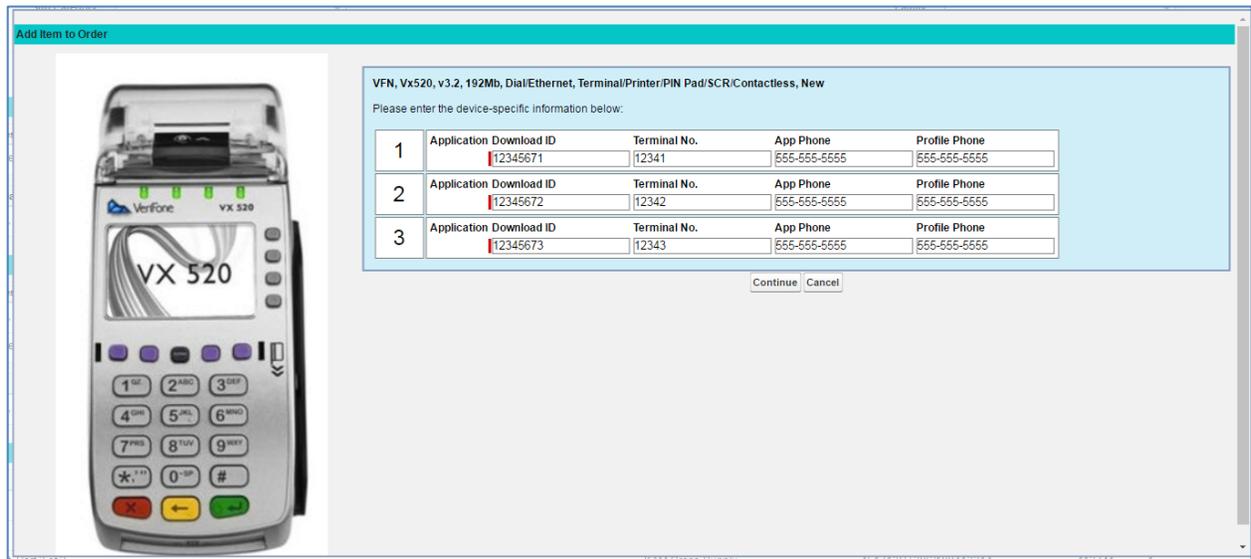
### Legacy Device Configuration

For Legacy Device Configuration, choose the Show Download & Injection radio button, select an application and/or injection as needed. Note that if only Legacy configurations have been certified for the selected product, you will not have radio buttons to choose between. Enter a Download ID, Terminal No., App Phone, & Profile Phone if an application was selected, and choose which test transactions you would like POS Portal to perform. Additional downloads can be selected for the device by clicking Add Another Download. Parameters can be selected or modified by clicking Show Parameters.

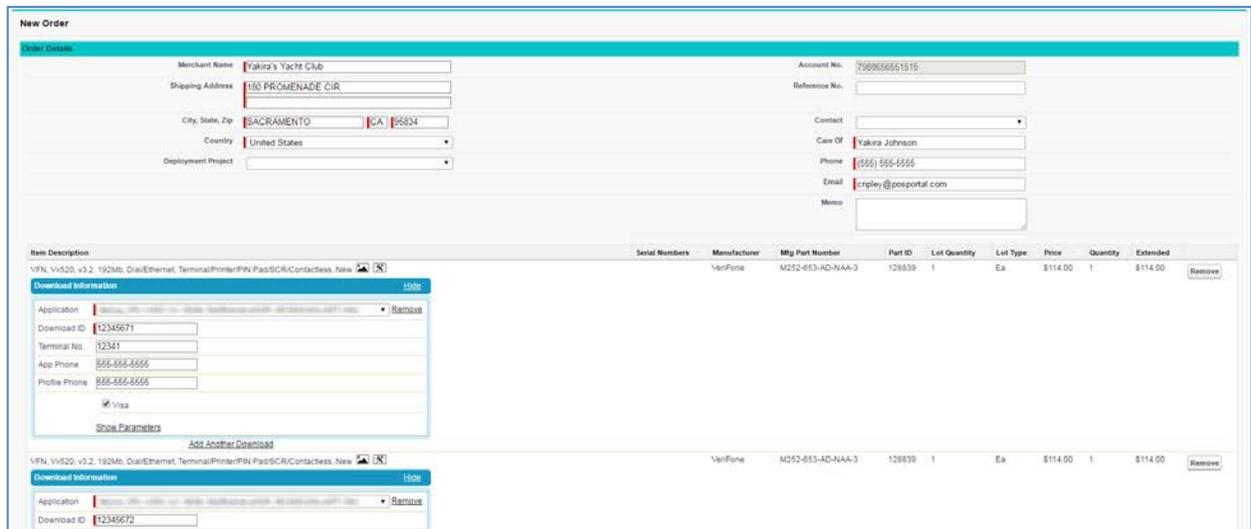


If a quantity of 1 was entered, clicking Continue will add the item to the order. The order item will appear below the Order Details section.

If a quantity greater than 1 was entered, and an application was selected, the user will be asked to enter a Download ID (required) and a Terminal No. (optional) for each application and device before the items can be added to the order.



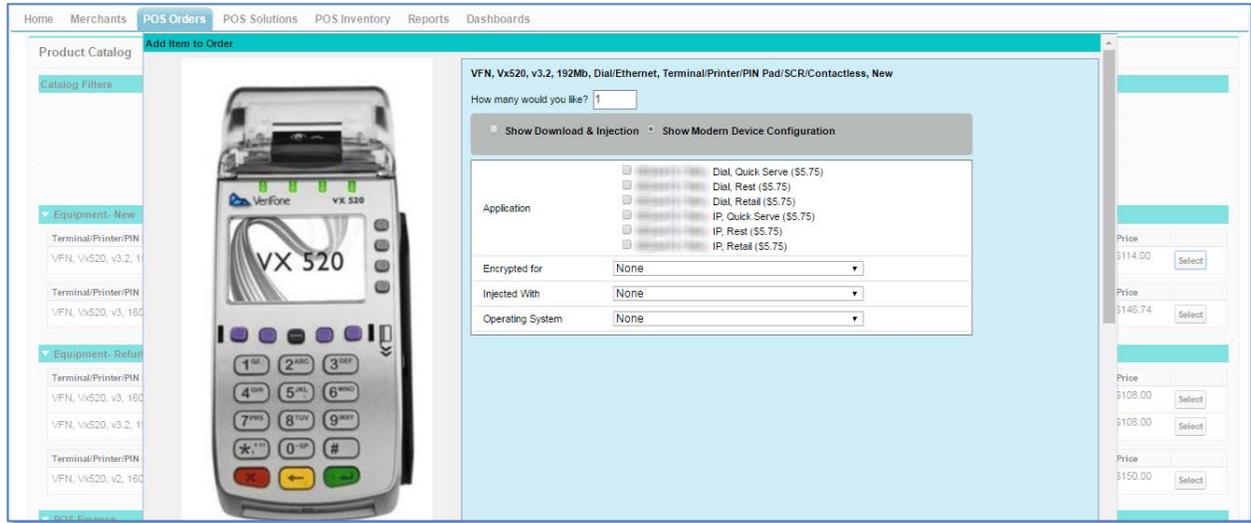
Once the required fields have been populated, the user may click Add Items to Order, and the order items will appear under the Order Details for review. The application, injection, attribute values or test transaction selections may be updated after the items have been added to the order.



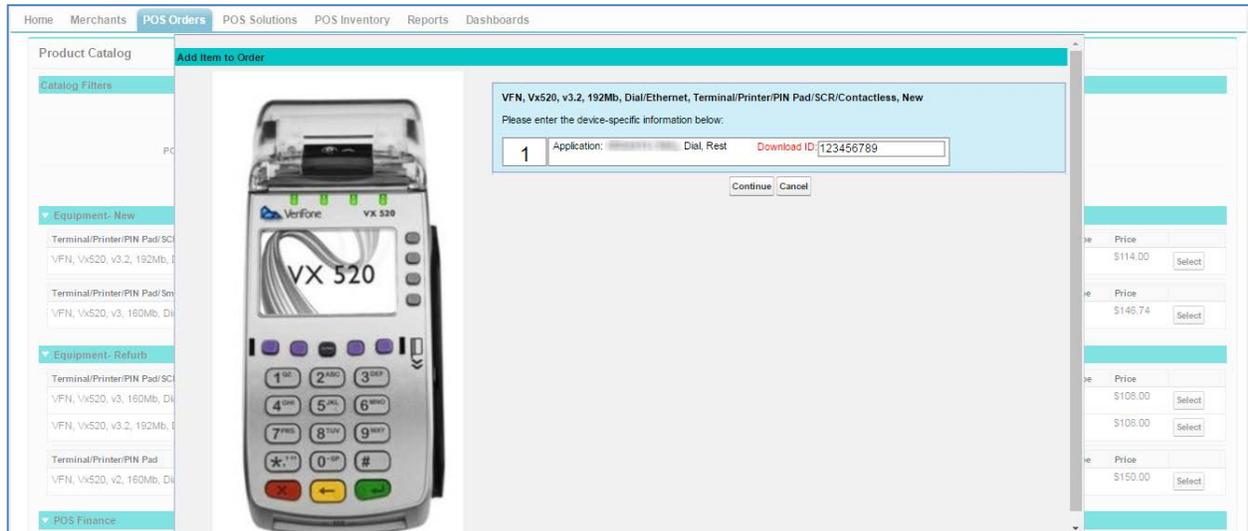
### Modern Device Configuration

For Modern Device Configuration, choose the Show Modern Device Configuration radio button. Note that if only Modern configurations have been certified for the selected product, you will not have radio buttons to choose between. The configuration type (i.e. Application, Operating System, etc.) is indicated to the left of the available configuration options. "Encrypted for" configuration type indicates data keys, and "Injected with" configuration type indicates debit keys. Configuration options where multiple selections are allowed for a single device (like applications) are selected by a checkbox, whereas configuration options where only a single selection is allowed (like operating systems) are selected by a radio button. If

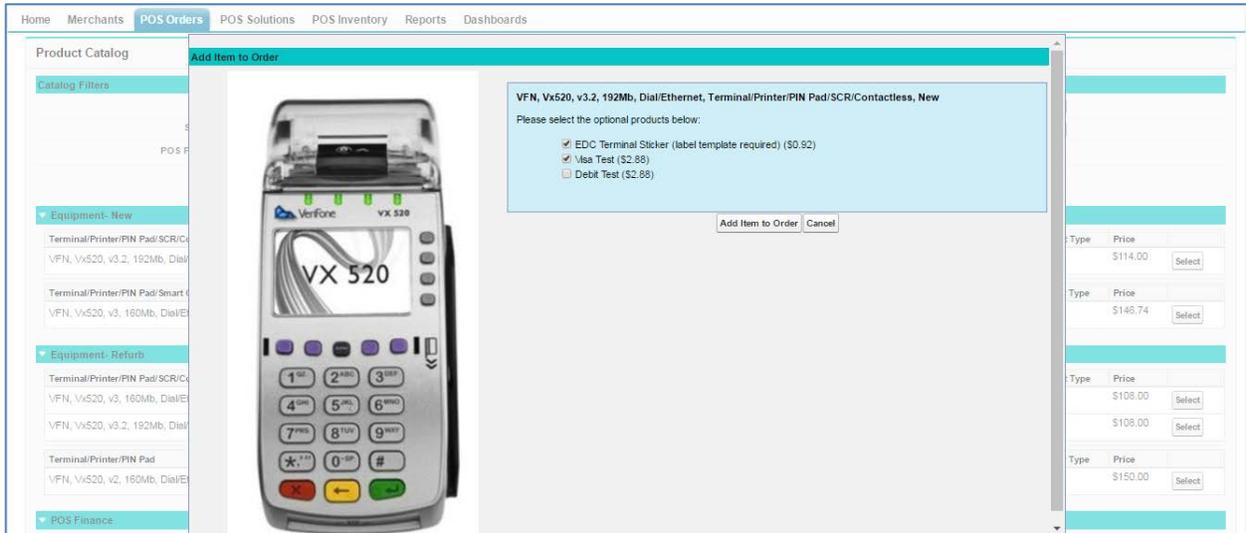
you have a P2PE agreement with POS Portal, you must select your P2PE certified data key in the “Encrypted for” section at this time.



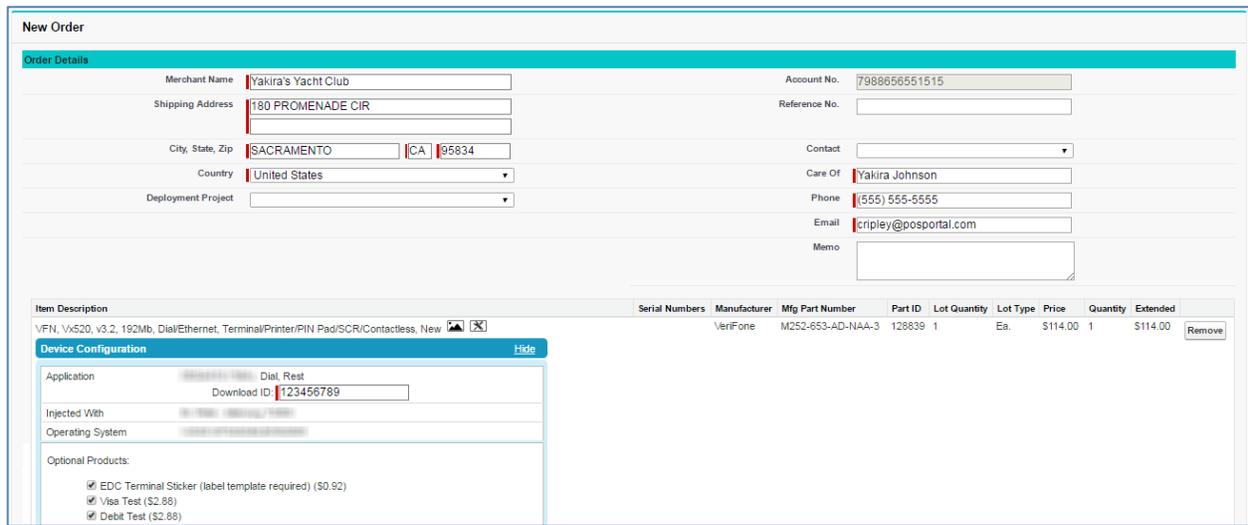
If there aren't any attributes or optional products associated to the selected configurations, clicking Continue will add the item to the order. The order item will appear below the Order Details section. However, if there are attributes required to perform the requested configurations, the user must enter or select the applicable values for each device ordered before proceeding.



After required attributes have been provided (if applicable), the user can select any optional products associated to the configurations chosen. These optional products include things like terminal stickers and transaction tests. Some optional products are set up to default to selected for certain configurations (e.g. Visa tests on applications), and some are not (e.g. Debit tests on injections).



Once optional products have been chosen, click Add Item to Order. The staging window will close, and the order item will appear below the Order Details section. Additional products may be selected and added to the order at this time. To complete the order, review and confirm the ship to information in the Order Details section, as well as the order items. When all desired products have been added to the order, and all required fields have been populated, click “Create Order”.



The Create Order button will be disabled (shown below) until all required fields are populated.

The screenshot shows a software interface with a 'Device Configuration' window. The window has a 'Hide' button in the top right corner. Inside the window, there are several sections: 'Application' with a dropdown menu and a 'Download ID' field containing '123456789'; 'Injected With' with a dropdown menu; 'Operating System' with a dropdown menu; and 'Optional Products' with three checked items: 'EDC Terminal Sticker (label template required) (\$0.92)', 'Visa Test (\$2.85)', and 'Debit Test (\$2.85)'. Below the window, there is a 'Method of Payment' dropdown menu set to 'Net 30' and a 'Subtotal' field showing '\$114.00'. At the bottom of the interface, there are two buttons: 'Create Order' and 'Cancel'. The 'Create Order' button is disabled.

Sometimes, an Address Validation alert may appear if the address validation service detects a discrepancy.

The screenshot shows an 'Address Validation Alert' dialog box with a red header. The main text reads: 'The address you entered seems to be invalid. Please check the address or select from one of the suggestion options below:'. There are three radio button options: '180 PROMENADE CIR, SACRAMENTO, CA 95834' (selected), '180 PROMENADE CIR, STE 300-315, SACRAMENTO, CA 95834', and '180 PROMENADE CIR, STE 320-335, SACRAMENTO, CA 95834'. At the bottom, there are two buttons: 'Use Suggested Address' and 'Close'.

Clicking the “Use Suggested Address” button will replace the address entered (or defaulted from the Account) with the version returned by the address validation service and creates the order. This ensures that there is a valid shipping address, and helps reduce errors in the fulfillment and delivery process. You may click Close to ignore the suggested address.

When the order is first created, it will stay in a "Draft" status until submitted to "Open". While in a draft status, the order can still be adjusted. Products can be added or removed, quantities updated, order information edited, and the shipping service level selected. The order can also be cancelled while in draft status without any fees.

Order No. 10613537

**Order Details**

Merchant Name: Yakira's Yacht Club  
 Shipping Address: 130 PROMENADE CIR  
 City, State, Zip: SACRAMENTO, CA 95834  
 Country: United States  
 Deployment Project:   
 Shipping Service Level: FedEx First Overnight (By 8:30am) [Update Quote](#)

Account No. 7988856551515  
 Reference No.   
 Contact:   
 Care Of: Yakira Johnson  
 Phone: (555) 555-5555  
 Email: orpley@posportal.com

Memo:

Item Description	Serial Numbers	Manufacturer	Mfg Part Number	Part ID	Lot Quantity	Lot Type	Price	Quantity	Extended	
VFN, V4520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless, New		VeriFone	M252-653-AD-NAA-3	128839	1	Ea.	\$114.00	1	\$114.00	<a href="#">Remove</a>
- Device Configuration - Terminal Programming		Other		101396	1	Ea.	\$5.75	1	\$5.75	
- <del>Device Configuration - Terminal Programming</del>		No Manufacturer		128150	1	Ea.	\$0.00	1	\$0.00	
- <del>Device Configuration - Terminal Programming</del>		No Manufacturer	VTR014	128155	1	Ea.	\$0.00	1	\$0.00	
- <del>Device Configuration - Terminal Programming</del>		No Manufacturer		128156	1	Ea.	\$0.00	1	\$0.00	
- Device Configuration - Injection		Other		101397	1	Ea.	\$3.45	1	\$3.45	
- Device Configuration - Terminal Programming		Other		101396	1	Ea.	\$5.75	1	\$5.75	
- <del>Sticker, Terminal (EDC) </del>		No Manufacturer	101942-POD	101942	1	Ea.	\$0.92	1	\$0.92	<a href="#">Remove</a>
- Device Configuration - Test Transaction, Visa		No Manufacturer		112957	1	Ea.	\$2.88	1	\$2.88	<a href="#">Remove</a>
- Device Configuration - Test Transaction, Debit		No Manufacturer		112960	1	Ea.	\$2.88	1	\$2.88	<a href="#">Remove</a>

Method of Payment: **Net 30**   
 Order Status: Draft   
 Order Classification: Portal Access   
 Order Method: Portal Access   
 Order Date: 1/27/2018 2:50 PM   
 Ship Date:   
 Subtotal: \$137.13   
 Freight: \$0.00   
 Handling: \$8.20   
 Tax: \$10.74   
 Order Total: \$154.07   
 Ordered By: Christanna Ripley

[Submit Order](#) [Cancel Order](#) [Back to Account](#)

Also note that upon initial creation of the order, configuration fee parts for services performed by POS Portal will be automatically added to the order. These parts are indented directly beneath the order item that triggered them to be added, and there is a "-" character preceding the product description to indicate that these items are related to the above order item.

The order will remain in draft status until it has been canceled or submitted to open. To submit the order to open, click the "Submit Order" button at the bottom of the page. No changes may be made to the order once it has been submitted to open as the fulfillment process will begin.

Home Merchants **POS Orders** POS Solutions POS Inventory Reports Dashboards

Order No. 10613537

**Order Details**

Merchant Name: Yakira's Yacht Club  
 Shipping Address: 130 PROMENADE CIR  
 City, State, Zip: SACRAMENTO, CA 95834  
 Country: US  
 Deployment Project:   
 Shipping Service Level: FedEx First Overnight (By 8:30am)

Account No. 7988856551515  
 Reference No.   
 Care Of: Yakira Johnson  
 Phone: (555) 555-5555  
 Email: orpley@posportal.com

Memo:   
[Initiate Credit Request](#)

Item Description	Serial Numbers	Manufacturer	Mfg Part Number	Part ID	Lot Quantity	Lot Type	Price	Order Quantity	Shipped Quantity	Extended
VFN, V4520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless, New		VeriFone	M252-653-AD-NAA-3	128839	1	Ea.	\$114.00	1	0	\$114.00
- Device Configuration - Terminal Programming		Other		101396	1	Ea.	\$5.75	1	0	\$5.75
- <del>Device Configuration - Terminal Programming</del>		No Manufacturer		128150	1	Ea.	\$0.00	1	0	\$0.00
- <del>Device Configuration - Terminal Programming</del>		No Manufacturer	VTR014	128155	1	Ea.	\$0.00	1	0	\$0.00
- <del>Device Configuration - Terminal Programming</del>		No Manufacturer		128156	1	Ea.	\$0.00	1	0	\$0.00
- Device Configuration - Injection		Other		101397	1	Ea.	\$3.45	1	0	\$3.45
- Device Configuration - Terminal Programming		Other		101396	1	Ea.	\$5.75	1	0	\$5.75
- <del>Sticker, Terminal (EDC) </del>		No Manufacturer	101942-POD	101942	1	Ea.	\$0.92	1	0	\$0.92
- Device Configuration - Test Transaction, Visa		No Manufacturer		112957	1	Ea.	\$2.88	1	0	\$2.88
- Device Configuration - Test Transaction, Debit		No Manufacturer		112960	1	Ea.	\$2.88	1	0	\$2.88

Method of Payment: **Terms - Net 30**   
 Order Status: Open   
 Order Classification: Equipment Purchase   
 Order Method: Portal Access   
 Order Date: 1/27/2018 2:59 PM   
 Ship Date:   
 Subtotal: \$137.13   
 Freight: \$0.00   
 Handling: \$8.20   
 Tax: \$10.74   
 Order Total: \$154.07   
 Ordered By: Christanna Ripley

[Cancel Order](#) [Back to Account](#)

The order will be related to the Merchant it originated from, and will appear in the POS Orders related list on the Merchant page.

Merchant  
Yakira's Yacht Club

« Back to List: Merchants

**Merchant Detail**

Merchant Name: Yakira's Yacht Club  
 Street Address: 180 PROMENADE CIR  
 City: SACRAMENTO  
 State: CA  
 Postal Code: 95834  
 Country: US

Created By: Christianna Ripley, 1/26/2018 5:42 PM

**POS Orders**

Action	Order Number
Edit	10613537

## Automated Order Updates

Once an order has been submitted for fulfillment, updates to that order are made by an “Order Discovery” process. These updates may include the following information:

- Order Status (i.e., Open, Shipped, etc.)
- Serial Numbers – as specific devices are picked for the order, those serial numbers will be displayed.
- Tracking numbers and package delivery status – the name of the person who signed for the package may also be displayed.
- Back order information – if some of the items were backordered or split, this information, along with links to those back/split orders will be displayed.

When orders are placed on other order entry platforms outside of Portal Access, the POS Order records are created in Salesforce by a scheduled job that runs every hour on the hour, and made visible in the community at that time.

## Locating a POS Solution

Once a serial number has been applied to an order, it will appear on the order view and in the POS Solutions related list on the Merchant.

The POS Solution is a record of a specific payment device. This device may be in the field (Shipped), Pending Shipment, Pending Return, or Returned. Clicking on the link under the “Equipment” heading in the related list brings up the detail page for the POS Solution. On the POS Solution record, there are links to the Merchant the device is associated to, as well as the order where the device shipped.

You can locate an order by a) searching for the serial number, or b) locating the Merchant where the order was placed and finding the POS Solutions related list.

7C9370F3-E665-4C9C-87E6-6CD524 Search Again Options...

**POS Solutions (1)**

Action	Equipment	Serial Number	Install Date	Equipment Status	Equipment Status Date	PO
Edit	VeriFone M280-703-AB-WWA-3	7C9370F3-E665-4C9C-87E6-6CD524	1/29/2018	Pending Return	1/29/2018	100

Merchant  
**Yakira's Yacht Club**

[← Back to List: Merchants](#)

**Merchant Detail** Edit Clone New Order Return Equipment

Merchant Name Yakira's Yacht Club

Street Address 180 PROMENADE CIR

City SACRAMENTO

State CA

Postal Code 95834

Country US

Created By [Christianna Ripley](#), 1/26/2018 5:42 PM

Edit Clone New Order Return Equipment

**POS Solutions**

Action	Equipment	POS Product	Product Name
<a href="#">Edit</a>	<a href="#">VeriFone M280-703-AB-WWA-3</a>	<a href="#">126707</a>	VFN, Vx805, v3.1, 160Mb, PIN Pad/Card Reader/SCR/Contactless Scanner

**POS Solution**

Product Name	VFN, Vx805, v3.1, 160Mb, w/ Cable, PIN Pad/Card Reader/SCR/Contactless	Account	<a href="#">View Account</a>
POS Product	<a href="#">127092</a>	Account Number	639588
Serial Number	7C9370F3-E665-4C9C-87E6-6CD524	Equipment Status	Shipped
Install Date	1/29/2018	Equipment Status Date	1/29/2018
Monthly Payment		Warranty Start Date	1/29/2018
Owner Type		Warranty End Date	2/28/2018
Rental Start Date			KSI
Rental End Date			DID
POS Portal Order	<a href="#">10613552</a>		KSN Date
Return Order			

Return Unit

## Creating a POS Solution

To manually create a POS Solution for a device not deployed by POS Portal, navigate to the merchant and click New POS Solution.

**Merchant Detail** Edit New Order New POS Solution Return Equipment

Merchant Name Yakira's Yacht Club

Street Address 180 PROMENADE CIR

City SACRAMENTO

State CA

Postal Code 95834

Country US

**POS Solution**

POS Product   Rental Start Date  [1/30/2018]

Serial Number  Rental End Date  [1/30/2018]

Install Date  [1/30/2018]

Monthly Payment

Click Select Product to search your catalog for the POS Portal part ID. You can search for products by the Manufacturer, Family, and Model Number. Click Select next to the desired product.

**Product Catalog**

**Catalog Filters**

Manufacturer  Model Number

Family

Product ID	Product Name	Model Number	Manufacturer	Family	
121600	VFN, Vx520, v2, 160Mb, Dial/Ethernet, Terminal/Printer/PIN Pad, Refurb	M252-153-03-NAA-2	VeriFone	Vx520	<input type="button" value="Select"/>
122565	VFN, Vx520, v3, 160Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless, Refurb	M252-653-A3-NAA-3	VeriFone	Vx520	<input type="button" value="Select"/>
128840	VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless, Refurb	M252-653-AD-NAA-3	VeriFone	Vx520	<input type="button" value="Select"/>

Enter a serial number, select an install date, and populate any other applicable fields. Click Save when you're finished.

**POS Solution**

POS Product   Rental Start Date  [1/30/2018]

Serial Number  Rental End Date  [1/30/2018]

Install Date  [1/30/2018]

Monthly Payment

Click Return Unit to initiate a return or replacement, or click Cancel to return to the Merchant. The new POS Solution will be listed in the Merchant's POS Solutions related list.

**POS Solution**

Product Name	VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless	Account	<a href="#">Mercury Payments</a>
POS Product	128838	Account Number	639588
Serial Number	321-321-321	Equipment Status	
Install Date	1/30/2018	Equipment Status Date	
Monthly Payment		Warranty Start Date	
Owner Type		Warranty End Date	
Rental Start Date		KSI	
Rental End Date		DID	
POS Portal Order		KSN Date	
Return Order			

## Returns and Replacements

A POS Solution may be eligible for return and/or replacement. A return or replacement can be initiated from three places in the application:

1. The POS Order (allows for the return of any device shipped on the order)
2. The POS Solution (allows for the return of the selected device only)
3. The Merchant (allows for the return of any device shipped to the merchant or created manually for the merchant)

Once the return has been initiated from one of the two entry points above, you will land on the Initiate Equipment Return page. Here you will indicate whether or not a call tag should be sent by selecting “POS Portal Sends a Pre-Paid Return Label” or “Client Pays for Inbound Shipping”, whether the unit is being returned or replaced by the “Return Only” and “Replace” radio buttons, and supply a reason for the return/replacement in the “Return Reason” dropdown. Optionally, additional details may be provided in the “Description of Problem” field. The Create Return Order button will be disabled until all required fields have been populated, as shown below.

The screenshot displays the 'Initiate Equipment Return' page. It is divided into three main sections: Merchant Information, Return Information, and Select Items to Return.

**Merchant Information:** Includes fields for Merchant Name (Yakira's Yacht Club), Address (190 PROMENADE CIR), City, State, Zip (SACRAMENTO, CA, 95634), MEDIAccount Number (7560666551515), Contact (Yakira Johnson), and Email (crgley@posportal.com).

**Return Information:** Features radio buttons for 'Return Only' (selected) and 'Replace', a 'Return Reason' dropdown menu, a 'Return Shipping' dropdown menu (set to 'POS Portal Sends a Pre-Paid Return Label'), and a 'Description of Problem' text area.

**Select Items to Return:** A table with columns for 'Return', 'Item', 'Serial Number', and 'Return Quantity'. The 'Return' column contains checkboxes. The table lists several items, all of which are 'VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SC/Contactless (128338)'. The serial numbers and return quantities are as follows:

Return	Item	Serial Number	Return Quantity
<input checked="" type="checkbox"/>	VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SC/Contactless (128338)	00DEE4D-QCA1-47C6-A51A-F9E024	1
<input type="checkbox"/>	VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SC/Contactless (128338)	505F8F67-31AD-40E4-9579-D35F8A	1
<input type="checkbox"/>	VFN, Vx520, v3.1, 160Mb, PIN Pad/Card Reader/SC/Contactless Scanner (126707)	E3529419-B1E9-4395-8131-D26458	1
<input type="checkbox"/>	VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SC/Contactless (128338)	394D31BF-904D-46CE-9611-BEFFF3	1
<input type="checkbox"/>	VFN, Vx605, v3.1, 160Mb, w/ Cable, PIN Pad/Card Reader/SC/Contactless (127092)	56062344-1859-4F8A-A54A-24D932	1
<input type="checkbox"/>	VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SC/Contactless (128338)	E6C511DD-77B4-446F-B791-8E394E	1
<input type="checkbox"/>	VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SC/Contactless (128338)	9EE17107-4814-450A-90EF-82F541	1

At the bottom, there is a 'Method of Payment' dropdown menu (set to 'Next 30') and 'Create Return Order' and 'Cancel' buttons.

When the “Return” radio button is selected, check the box to the left of the item(s) you wish to return, and click “Create Return Order”.

The return order will initially be created in a draft status. At this point the order can be reviewed or updated, and additional items can be added to the order before submitting the order to open.

When the “Replace” radio button is selected, a Stage for Replacement button will appear next to the replaceable equipment. Click the button to select the configurations for the replacement device like you would for a new deployment order.

Once your configurations have been selected & saved, the replacement device will be listed in the Items section. If you have additional items to replace, click the Stage Replacement button next to the equipment from the Items Available for Replacement section. Otherwise you may click “Create Return Order” to proceed, or click “Remove” next to a replacement item to start over. The “Create Return Order” button will be disabled until all required fields have been populated as shown below.

As mentioned previously, the replacement order will initially be created in a draft status. At this point the order can be reviewed and updated before submission.

Order No. 10613559

**Order Details**

Merchant Name: Yakira's Yacht Club  
 Shipping Address: 180 PROMENADE CIR  
 City, State, Zip: SACRAMENTO, CA, 95834  
 Country: United States  
 Deployment Project: [Blank]  
 Shipping Service Level: FedEx First Overnight (By 8:30am) (\$0)

Account No.: 798855551515  
 Reference No.: [Blank]  
 Contact: [Blank]  
 Care Of: Yakira Johnson  
 Phone: (555) 555-5555  
 Email: crpley@posportal.com  
 Memo: [Blank]

Item Description	Serial Numbers	Manufacturer	Mfg Part Number	Part ID	Lot Quantity	Lot Type	Price	Quantity	Extended
Call Tag, POS Portal Issued		No Manufacturer		101401	1	Ea	\$2.35	1	\$2.35
- Call Tag, Management		Other		101400	1	Ea	\$2.07	1	\$2.07
- Call Tag, POS Portal Generic Letter		No Manufacturer		114584	1	Ea	\$0.00	1	\$0.00
- Replacement VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless		No Manufacturer	M252-653-AD-NAA-3	128843	1	Ea	\$0.00	1	\$0.00
- UPL, VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless		VeriFone	M252-653-AD-NAA-3	128841	1	Ea	\$16.67	1	\$16.67
- VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless, Return		VeriFone	M252-653-AD-NAA-3	128840	1	Ea	\$0.00	1	\$0.00
- Device Configuration - Terminal Programming		Other		101396	1	Ea	\$5.75	1	\$5.75
- Device Configuration - Injection		No Manufacturer		128150	1	Ea	\$0.00	1	\$0.00
- Device Configuration - Terminal Programming		No Manufacturer	VTR014	128155	1	Ea	\$0.00	1	\$0.00
- Device Configuration - Injection		No Manufacturer		128156	1	Ea	\$0.00	1	\$0.00
- Device Configuration - Terminal Programming		Other		101397	1	Ea	\$3.45	1	\$3.45
- Device Configuration - Terminal Programming		Other		101396	1	Ea	\$5.75	1	\$5.75
- Sticker, Terminal (EDC)		No Manufacturer	101942-POD	101942	1	Ea	\$0.92	1	\$0.92
- Device Configuration - Test Transaction, Visa		No Manufacturer		112957	1	Ea	\$2.88	1	\$2.88

Method of Payment: Net 30  
 Order Status: Draft  
 Order Classification: [Blank]  
 Order Method: Portal Access  
 Order Date: 1/29/2018 8:53 PM  
 Ship Date: [Blank]

Subtotal: \$39.84  
 Freight: \$0.00  
 Handling: \$6.20  
 Tax: \$2.47  
 Order Total: \$48.51  
 Ordered By: Christanna Ripley

Buttons: Submit Order, Cancel Order, Back to Account

After the order is submitted, the outbound replacement or call tag only order will be updated as the order fulfillment progresses. Tracking of the inbound unit on a return or a replacement is done through the POS Solution record. When a return order is created, with or without a replacement, the inbound POS Solution record goes into a status of "Pending Return". The unit will stay in this status until it is received by POS Portal. At that time, the Order Discovery process will update the unit's status to "Returned".

Order No. 10613559

**Order Details**

Merchant Name: Yakira's Yacht Club  
 Shipping Address: 180 PROMENADE CIR  
 City, State, Zip: SACRAMENTO, CA 95834  
 Country: US  
 Deployment Project: [Blank]  
 Shipping Service Level: FedEx First Overnight (By 8:30am)

Account No.: 798855551515  
 Reference No.: [Blank]  
 Care Of: Yakira Johnson  
 Phone: (555) 555-5555  
 Email: crpley@posportal.com  
 Memo: [Blank]

[Initiate Credit Request](#)

Return Information

Return Status: Open  
 Expected Item: VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless  
 Reason: Unit not operating, keys not functioning  
 Expecting Serial No: 5CTAIP97-0001-4CE9-BBAD-EDB0F2

Item Description	Serial Numbers	Manufacturer	Mfg Part Number	Part ID	Lot Quantity	Lot Type	Price	Order Quantity	Shipped Quantity	Extended
Call Tag, POS Portal Issued		No Manufacturer		101401	1	Ea	\$2.35	1	0	\$2.35
- Call Tag, Management		Other		101400	1	Ea	\$2.07	1	0	\$2.07
- Call Tag, POS Portal Generic Letter		No Manufacturer		114584	1	Ea	\$0.00	1	0	\$0.00
- Replacement VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless		No Manufacturer	M252-653-AD-NAA-3	128843	1	Ea	\$0.00	1	1	\$0.00
- UPL, VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless		VeriFone	M252-653-AD-NAA-3	128841	1	Ea	\$16.67	1	0	\$16.67
- VFN, Vx520, v3.2, 192Mb, Dial/Ethernet, Terminal/Printer/PIN Pad/SCR/Contactless, Return		VeriFone	M252-653-AD-NAA-3	128840	1	Ea	\$0.00	1	0	\$0.00
- Device Configuration - Terminal Programming		Other		101396	1	Ea	\$5.75	1	0	\$5.75
- Device Configuration - Injection		No Manufacturer		128150	1	Ea	\$0.00	1	0	\$0.00
- Device Configuration - Terminal Programming		No Manufacturer	VTR014	128155	1	Ea	\$0.00	1	0	\$0.00
- Device Configuration - Injection		No Manufacturer		128156	1	Ea	\$0.00	1	0	\$0.00
- Device Configuration - Terminal Programming		Other		101397	1	Ea	\$3.45	1	0	\$3.45
- Device Configuration - Terminal Programming		Other		101396	1	Ea	\$5.75	1	0	\$5.75
- Sticker, Terminal (EDC)		No Manufacturer	101942-POD	101942	1	Ea	\$0.92	1	0	\$0.92
- Device Configuration - Test Transaction, Visa		No Manufacturer		112957	1	Ea	\$2.88	1	0	\$2.88

Method of Payment: Terms - Net 30  
 Order Status: Open  
 Order Classification: Replacement, Non-Rental  
 Order Method: Portal Access  
 Order Date: 1/29/2018 8:55 PM  
 Ship Date: [Blank]

Subtotal: \$39.84  
 Freight: \$0.00  
 Handling: \$6.20  
 Tax: \$2.47  
 Order Total: \$48.51  
 Ordered By: Christanna Ripley

Buttons: Cancel Order, Back to Account

## Credit Requests

To submit a credit request on an order in Portal Access, open the order and click the 'Initiate Credit Request' hyperlink on the right side of the Order Details section. A credit request can be submitted on any order that does not already have a credit request.

Order No. 10613538

**Order Details**

Merchant Name	Yakra's Yacht Club	Account No.	7968606551515
Shipping Address	100 PROMENADE CIR	Reference No.	
City, State, Zip	SACRAMENTO, CA 95834	Care Of	Yakra Johnson
Country	US	Phone	(555) 555-5555
Deployment Project		Email	cripley@posportal.com
Shipping Service Level	FedEx First Overnight (By 8:30am)	Memo	

[Initiate Credit Request](#)

Item Description	Serial Numbers	Manufacturer	Mfg Part Number	Part ID	Lot Quantity	Lot Type	Price	Order Quantity	Shipped Quantity	Extended
VPR, V4805, v3.0, 160MB, PIN Pad/Card Reader/SCR/Contactless Scanner, New		VeriFone	M280-703-A3-101A-3	122442	1	EA	\$109.45	1	0	\$109.45

Method of Payment: Terms - Net 30  
Order Status: Open  
Order Classification: Equipment Purchase  
Order Method: Portal Access  
Order Date: 1/20/2018 8:13 AM  
Ship Date:

Subtotal: \$110.95  
Freight: \$0.00  
Handling: \$4.65  
Tax: \$9.41  
Order Total: \$125.01  
Ordered By: Christanna Ripley

[Cancel Order](#) [Back to Account](#)

If an order already has a credit request, the 'Initiate Credit Request' hyperlink will not appear on the order, and instead, the credit request order number will display at the bottom of the page.

Method of Payment: Terms - Net 30  
Order Status: Shipped  
Order Classification: Replacement, Non-Rental  
Order Method: Portal Access  
Order Date: 1/29/2018 6:55 PM  
Ship Date: 1/29/2018 6:57 PM

Reason: Order Arrived After Cutoff

Subtotal: \$39.84  
Freight: \$0.00  
Handling: \$6.20  
Tax: \$2.47  
Order Total: \$48.51  
Ordered By: Christanna Ripley  
Invoice Batch No.: 1073064

[Credit Request 10613560](#)

[Back to Account](#)

After initiating the credit request, a window will appear on the order where you will select the credit reason from the dropdown, and enter details about the request in the freeform textbox.

**Credit Request**

Are you sure that you wish to process a credit request for this order?

If so, please explain why below:

Credit Reason:

[Submit Credit Request](#) [Cancel](#)

When finished, click the Submit Credit Request button. A validation message confirms the credit request was created successfully.

**Credit Request**

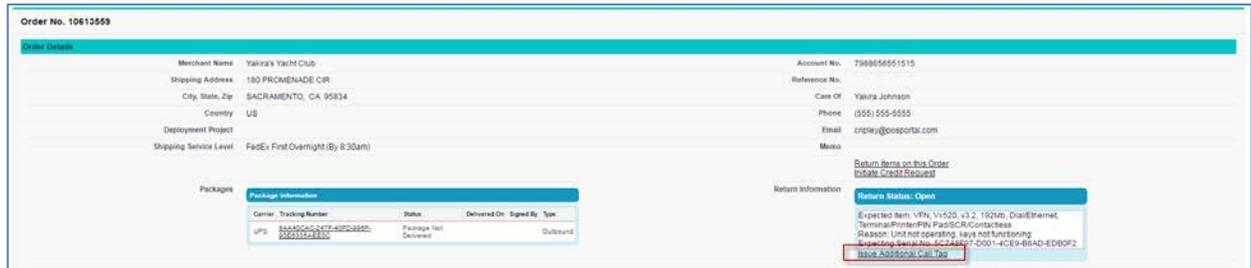
The credit request was successfully submitted. There is a link to the credit request below.

[Close](#)

To navigate to the credit request, click the order number hyperlink next to Credit Request at the bottom of the page.

## Additional Call Tags

To issue an additional prepaid shipping label for an open call tag, navigate to the call tag or replacement order, and click Issue Additional Call Tag button under the Expected Items.



Modify the shipping address as needed, ensuring all required fields are populated before clicking Create Additional Call Tag.

**Additional Call Tag**

Please confirm shipping address for additional call tag:

Merchant Name

Shipping Address

City, State, Zip

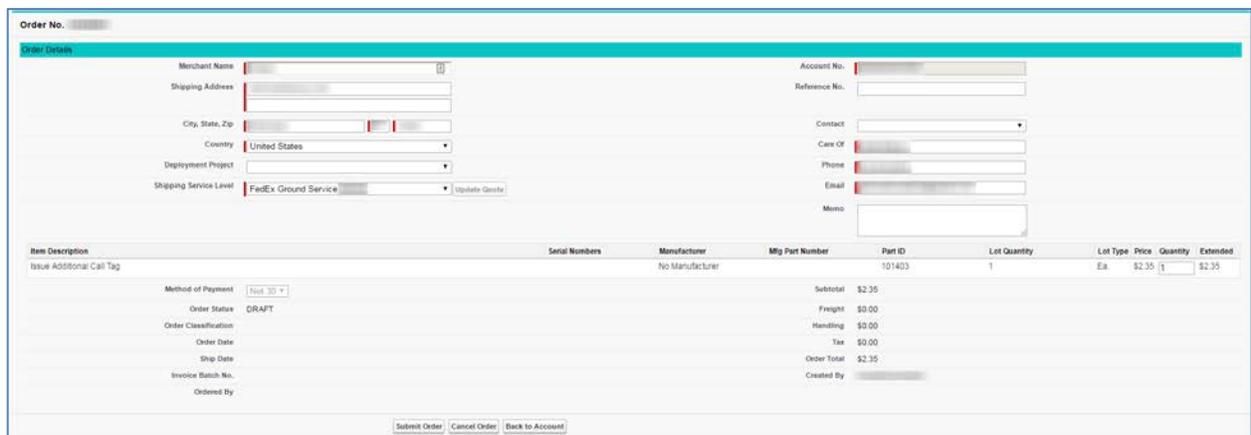
Country

Care Of

Phone

Email

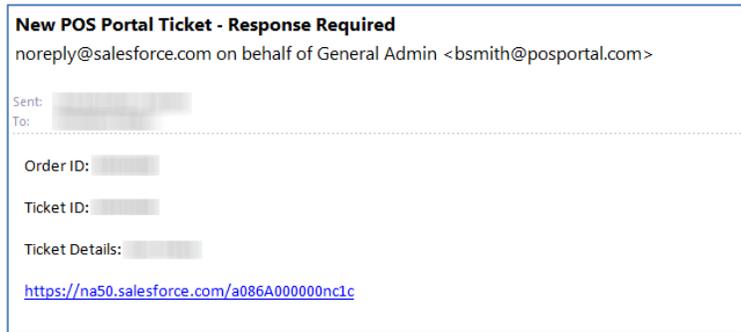
Like a new deployment, the additional call tag order will initially be created in a draft status. At this point, you may update the ship to address, shipping service level and contact information as needed before submitting the order to open.



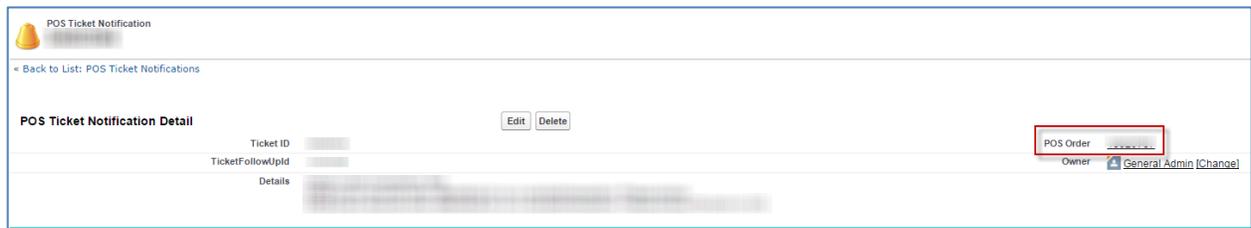
## POS Ticket Notifications

POS Portal offers two options for notification of a ticket by email. A customer may choose to either a) provide a single email distribution to receive ticket notifications, or b) allow all community users with active licenses to receive ticket notifications.

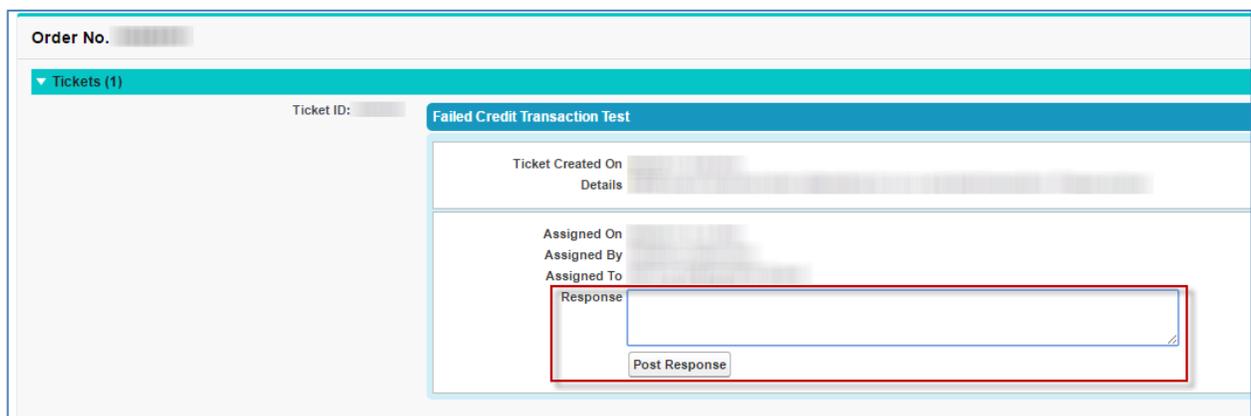
When an order is ticketed, an email will be sent to the recipients (based on the preference above) containing the order ID, ticket ID, ticket details, and a link to view the ticket in the community.



To respond to the ticket in the community, follow the link in the email and click on the order ID.



All tickets and ticket follow ups associated to the order will be located at the top of the order. Enter a response in the freeform textbox for the ticket in question and click Post Response to complete the follow up on the ticket.



## Reporting

Because Portal Access is a Salesforce application, community users can leverage the benefits of native Salesforce reporting. For step by step instructions on how to create a report in Salesforce, visit the [Trailblazer Community Documentation](#).

The following prebuilt reports are available to all community users. These reports can be ran, exported, and customized as needed.

<b>Report Name</b>	<b>Report Description</b>
All Open Orders	All orders that are in Open status.
All Recent Orders	All orders that were placed in the last 7 days.
All Draft Orders	All orders that are in Draft status.
Open Order Count	Total count of open orders.
Open Orders by Status	All open orders grouped by status.
Order by Deployment Project	This report lists all orders grouped by Deployment Project Name.
Orders By Classification	Shows orders by classification.
Orders By Classification - Amount	Groups orders by classification with dollar amount totals.
Orders By Day	Shows count and total dollar amount of orders by day.
Orders by Invoice Batch No.	This report lists all orders grouped by the Invoice Batch No.
Orders By User	The default parameters of this report returns all orders grouped by order keyer.
Orders Shipped Yesterday	All shipped orders with a ship date of yesterday.
POS Equipment Pending Return	POS Solutions with an equipment status of Pending Return.
POS Solution by OEM	POS Solutions grouped by OEM.
POS Portal Tickets Pending Response	All ticket notifications from POS Portal requiring a response.

To build a custom report, refer to the Portal Access glossary, which lists the objects and fields available for reporting.

## Portal Access Glossary

Object (Tab)	Field	Definition
Merchants	Account Number	The Merchant's MID.
Merchants	Alternate Account Number	The Merchant's Alternate MID (optional).
Merchants	AMEX Account Number	Merchant's AMEX Account Number.
Merchants	Chain Code	Merchant's chain or franchise code.
Merchants	City	Merchant's city (defaults City field on a new order).
Merchants	Client	The name of the Client.
Merchants	Contact Name	Merchant's contact (defaults the Care Of field on a new order).
Merchants	Country	Merchant's country.
Merchants	Discover Account Number	Merchant's Discover Account Number.
Merchants	Email	Merchant's email address(es) (defaults the Email field on the order).
Merchants	Help Desk Phone	Merchant's Help Desk Phone (can default the Help Desk Phone on terminal sticker if specified by sticker template)
Merchants	Merchant DBA Name	Merchant's doing business as name.
Merchants	Merchant Name	Merchant's legal name (defaults Merchant Name field on a new order).
Merchants	Phone	Merchant's phone number (defaults the Phone field on a new order).
Merchants	Postal Code	Merchant's zip code (defaults the Zip field on a new order).
Merchants	State	Two letter code for merchant's state or territory (defaults State field on a new order).
Merchants	Status	Merchant's status; picklist values include Active, Inactive, and Closed.
Merchants	Street Address	Merchant's address lines 1 and 2 (defaults Shipping Address fields on a new order).
Merchants	Supply Club	If checked, indicates that the Merchant is in the client's supply club program.
Merchants	Tax Exempt	If checked, indicates that the Merchant is tax exempt.

Merchants	Voice Authorization Phone	Merchant's Voice Authorization Phone (can default the Voice Auth Phone on terminal sticker if specified by sticker template)
POS Orders	Adjustment Order ID	Order ID that associates a parent order to its adjustment order (if one exists); adjustment orders are generated to adjust a customer's invoice in lieu of a credit request.
POS Orders	Back Order ID	Order ID that associates a parent order to its back order or split order (if one exists); back orders are generated when some of the products on an order are temporarily out of stock, and will be fulfilled once the products have been re-stocked. Split orders are generated when some of the products on an order are out of stock at the facility fulfilling the order, and will be fulfilled same day by a second facility.
POS Orders	Care Of	Care Of is the name of the person or entity in the ship to information of the order.
POS Orders	Deployment Project	Deployment Project is the name of the project if the order was created for a deployment project (large roll out).
POS Orders	Invoice Batch No.	The Invoice Batch No. is the ID of the order's invoice batch. This field is populated upon shipment.
POS Orders	Merchant Account	The name of the Salesforce Merchant the order is associated to.
POS Orders	Merchant Account Number	The MID of the Merchant the order is associated to.
POS Orders	Merchant Name	The name of the merchant in the ship to information of the order; typically the customer's dba name.
POS Orders	Order Classification	The order's classification as determined by POS Portal (e.g. Equipment Purchase, Consumables Only, etc.)
POS Orders	Order Date	The date the order was submitted to open.
POS Orders	Order Discovery Process Items Status	Indicates whether or not an order has been processed by the job that creates its related POS Order Items and POS Solutions.
POS Orders	Order Email	The email(s) of the merchant in the ship to

		information of the order; email(s) that will receive shipping confirmation.
POS Orders	Order ID	POS Portal's order ID; the unique identifier of the order in POS Portal's database.
POS Orders	Order Method	The order's method of entry (e.g. Portal Access, WebAPI, etc.).
POS Orders	Order Phone	The phone number of the merchant in the ship to information of the order.
POS Orders	Order Status	The status of the order (e.g. Open, Shipped, etc.).
POS Orders	Order Total	The total dollar amount of the order, including shipped order items, freight, tax and handling.
POS Orders	Ordered By	The user who created the order.
POS Orders	Parent Order ID	Order ID that associates a back order to its parent order(s).
POS Orders	POS Client ID	The client ID of the ordering entity.
POS Orders	POS Client Name	The client name of the ordering entity.
POS Orders	POS Client Type	The client type of the ordering entity.
POS Orders	POS Portal Merchant ID	POS Portal's merchant ID; the unique identifier of the merchant in POS Portal's database.
POS Orders	Reason	The reason the order did not ship the same day it was submitted, if applicable.
POS Orders	Reference Number	The customer's or merchant's reference number for the order (optional).
POS Orders	Return Date	The date the order was returned by the carrier if delivery was refused or shipped to a bad address.
POS Orders	Ship Date	The date the order was shipped.
POS Orders	Shipping City	The city of the customer or merchant in the ship to information of the order.
POS Orders	Shipping Postal Code	The zip code of the customer or merchant in the ship to information of the order.
POS Orders	Shipping State	The state or region of the customer or merchant in the ship to information of the order.
POS Orders	Shipping Street	The street address (line 1) of the customer or merchant in the ship to information of

		the order.
POS Order Items	Order Item ID	POS Portal's order item ID; the unique identifier of the order item in POS Portal's database.
POS Order Items	Order Quantity	The quantity ordered of the order item.
POS Order Items	POS Order	The order link or lookup that associates an order item to its order (header).
POS Order Items	POS Portal Order ID	The order ID of the item's order.
POS Order Items	POS Product	The product link or lookup that associates an order item to its product.
POS Order Items	Price	The price of the product on the order. (Note: This is not the extended price of the order item. To calculate the order item price, multiply this field by the Shipped Quantity field.)
POS Order Items	Product ID	The product ID of the item's product.
POS Order Items	Product Name	The product name of the item's product.
POS Order Items	Shipped Quantity	The quantity shipped of the order item.
POS Packages	Carrier	The carrier delivering the order's package (FedEx or UPS).
POS Packages	Delivery Date/Time	The date and time the package was delivered.
POS Packages	POS Client ID	The client ID of the ordering entity.
POS Packages	POS Order	The order link or lookup that associates a package to its order (header). A single order may have one or many associated packages.
POS Packages	POS Portal Order ID	The order ID of the package's order.
POS Packages	Service Level	The service level of the package (e.g. Ground, Next Day Afternoon, etc.)
POS Packages	Signed By	The person who signed for the package according to the carrier.
POS Packages	Status	The status of the package (e.g. Package Not Delivered, Package Delivered, etc.)
POS Packages	Tracking Number	The tracking number of the package.
POS Packages	Type	Indicates whether the package is Outbound (shipping to a customer or merchant), or Inbound (shipping to POS Portal against an RMA).

POS Products	Model Number	The manufacturer's model number of the product.
POS Products	POS Portal Part ID	POS Portal's part ID; the unique identifier of the product in POS Portal's database.
POS Products	Product Category	The product's category (e.g. Equipment - New, Accessories, etc.).
POS Products	Product Family	The product's family (e.g. Vx520, iPP320, etc.).
POS Products	Product Name	The product's name.
POS Products	Product OEM	The product's manufacturer.
POS Products	Product Subcategory	The product's subcategory (e.g. Cables, Power Supplies, etc.).
POS Solutions	Account	The link or lookup that associates a POS Solution (or installed equipment) to its Account.
POS Solutions	Account Number	The Account Number (or MID) the installed equipment is associated to.
POS Solutions	DID	The DID of the KSN for the installed equipment.
POS Solutions	Equipment Status	The status of the installed equipment (e.g. Shipped, Pending Return, etc.).
POS Solutions	Equipment Status Date	The date the installed equipment's status last changed.
POS Solutions	Install Date	The install date of the installed equipment.
POS Solutions	Installed Equipment ID	POS Portal's installed equipment ID; the unique identifier of the product in POS Portal's database.
POS Solutions	KSI	The KSI of the KSN for the installed equipment.
POS Solutions	KSN Date	The date the KSN was captured for the installed equipment.
POS Solutions	POS Client ID	The client ID of the ordering entity.
POS Solutions	POS Order Item	The order item or lookup that associates installed equipment to its order item. A single order item may have one or many associated installed equipment.
POS Solutions	POS Portal Merchant ID	POS Portal's merchant ID; the unique identifier of the merchant in POS Portal's database.

POS Solutions	POS Portal Order	The order link or lookup that associates installed equipment to its order (header). A single order may have one or many associated installed equipment.
POS Solutions	POS Portal Order ID	The order ID of the installed equipment's order.
POS Solutions	POS Portal Order Item ID	The order item ID of the installed equipment's order item.
POS Solutions	POS Portal Part ID	POS Portal's part ID; the unique identifier of the product in POS Portal's database.
POS Solutions	POS Product	The product link or lookup that associates installed equipment to its product.
POS Solutions	Product Name	The product name of the installed equipment.
POS Solutions	Serial Number	The serial number of the installed equipment.
POS Solutions	Warranty End Date	The warranty end date of the installed equipment.
POS Ticket Notifications	Completed Date	The date the ticket follow up was completed.
POS Ticket Notifications	Created by POS Portal	Indicates the ticket follow up was created by POS Portal.
POS Ticket Notifications	Details	The message from POS Portal's ticket keyer which requires a response.
POS Ticket Notifications	POS Client ID	The client ID the ticket is associated to.
POS Ticket Notifications	POS Order	The order link or lookup that associates a ticket notification to its order (header).
POS Ticket Notifications	Ticket Category ID	The ticket's category ID.
POS Ticket Notifications	Ticket Category Description	The ticket's category description (e.g. Configuration, Certification, etc.).
POS Ticket Notifications	Ticket Type ID	The ticket's type ID.
POS Ticket Notifications	Ticket Type Description	The ticket's type description (e.g. Failed Credit Transaction Test).
POS Ticket Notifications	TicketFollowUpId	POS Portal's ticket follow up ID; the unique identifier of the ticket follow up in POS Portal's database.