

iPOSpays User Manual

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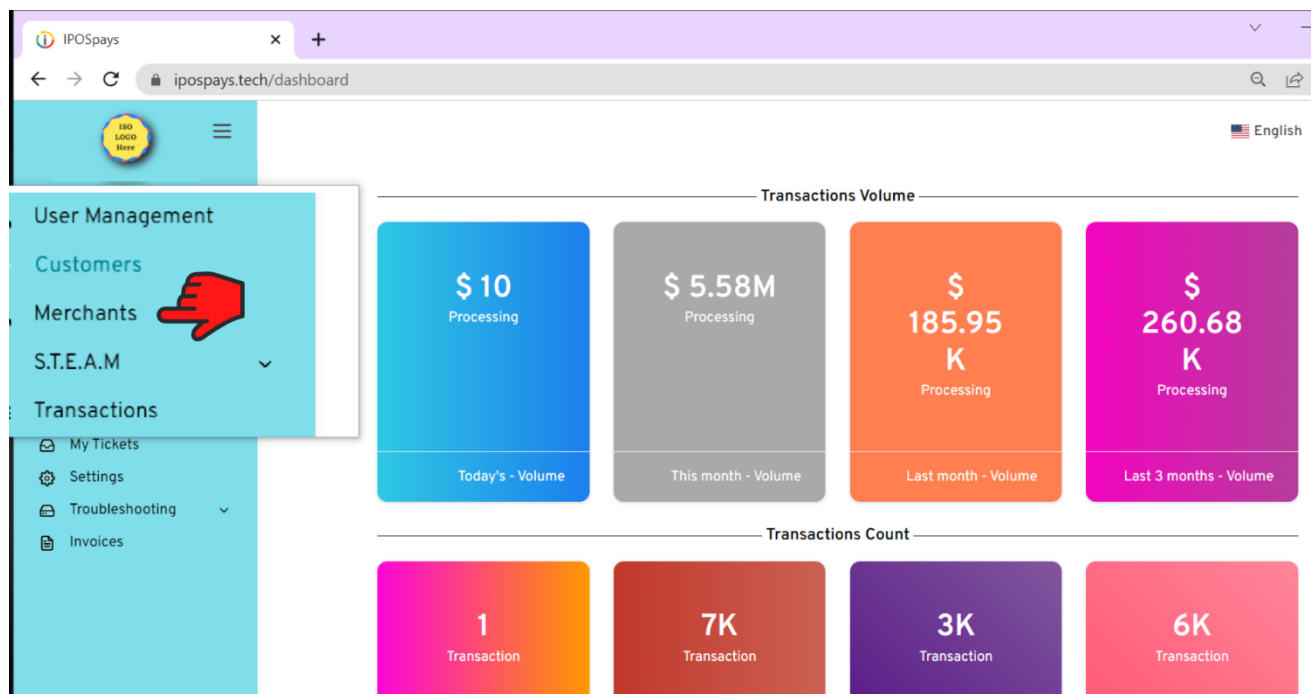
LOGIN:

Go to www.ipospays.com

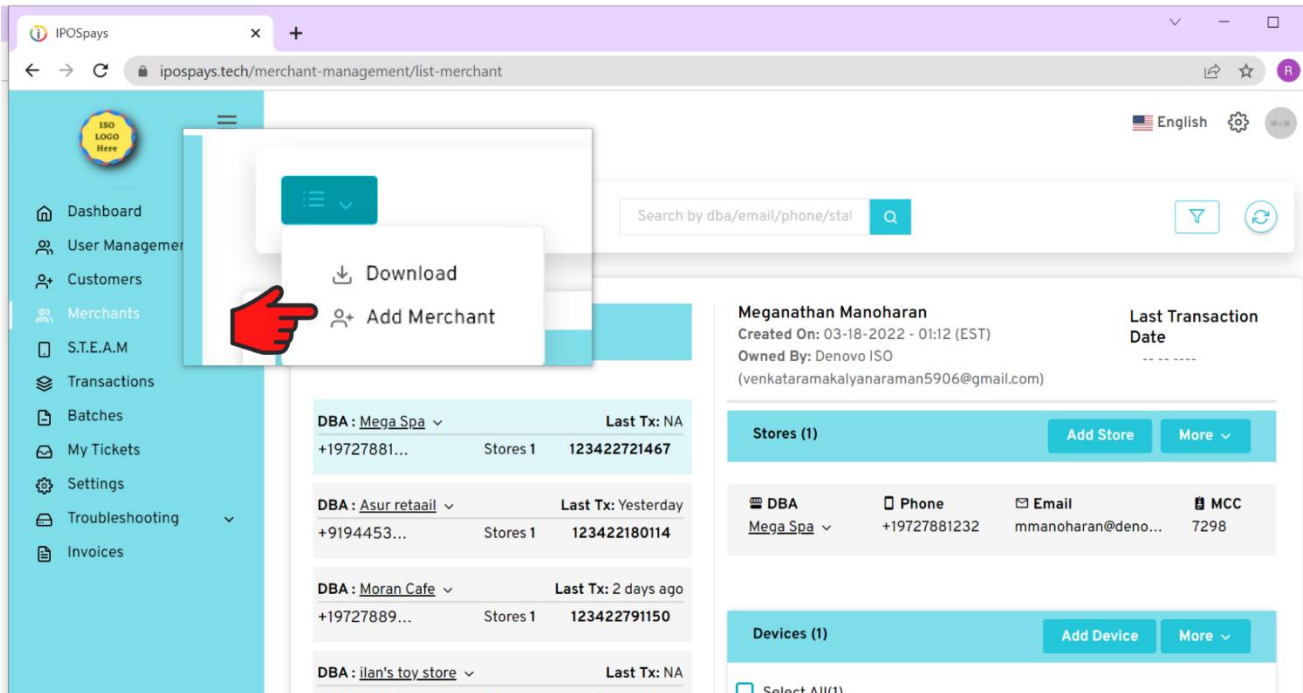
Type your username & password to login

ADD MERCHANT

Step 1: Click **merchant**

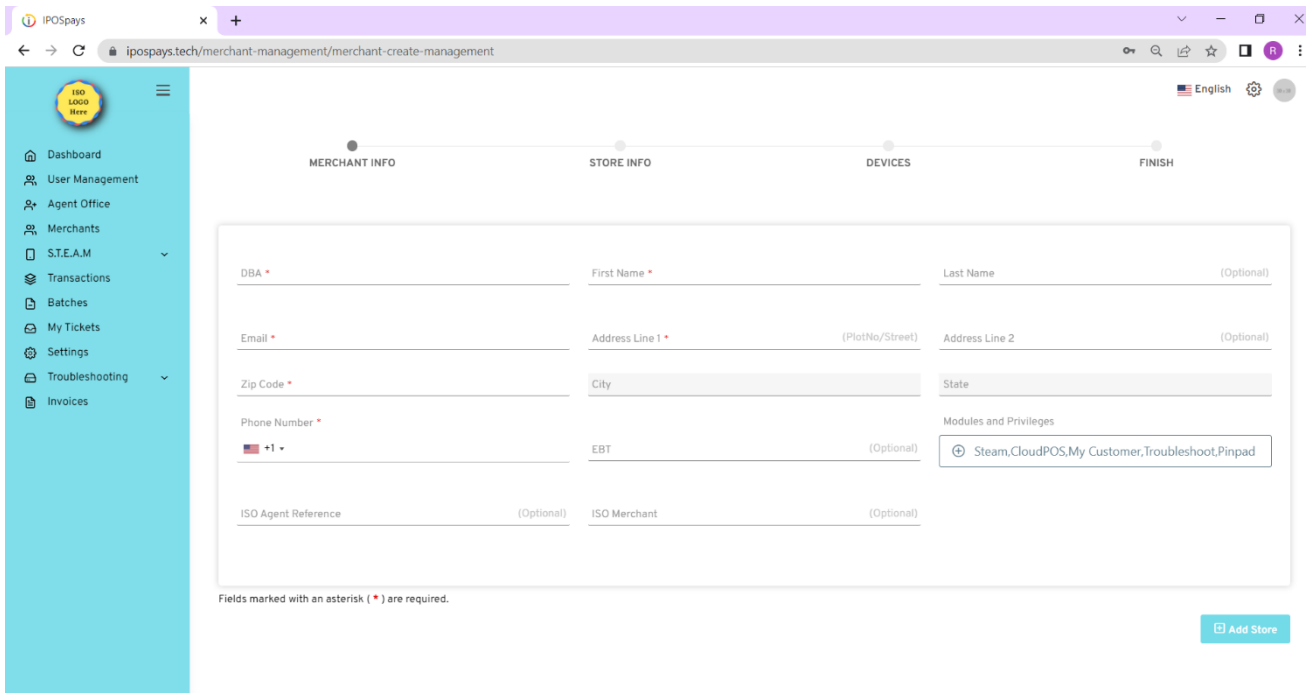


Step 2: Click the action list item button and choose **Add Merchant**



Step 3: Fill out the same merchant details as on the VAR SHEET.

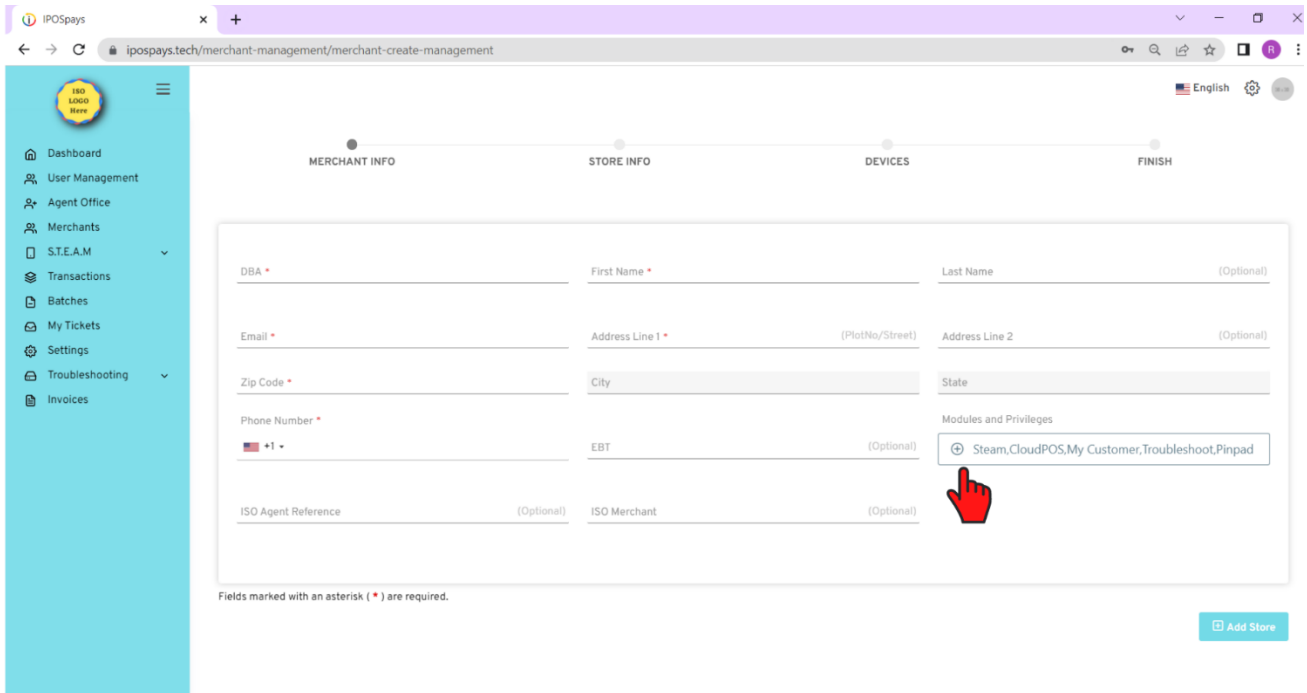
! The merchant's email will be used as a username and will receive an activation email.



ISO Agent reference & ISO Merchant: These references will be shared on monthly invoices, which will be helpful for your (ISO) internal records.

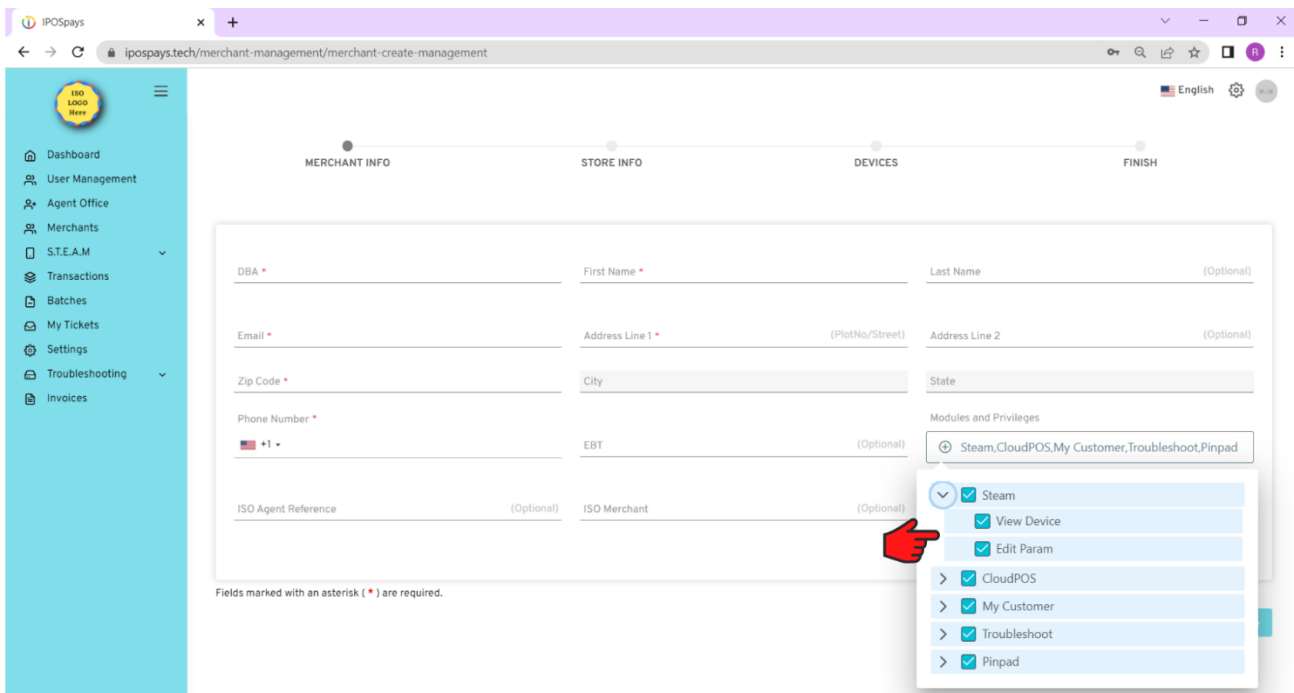
Modules & Privileges

Step 4: After completing the merchant details, click on the Modules and Privileges button,



The screenshot shows the 'Merchant Create Management' page in the iPOS Pays system. The page is divided into four steps: MERCHANT INFO, STORE INFO, DEVICES, and FINISH. The 'MERCHANT INFO' step is active. The form contains several fields: DBA (required), First Name (required), Last Name (Optional), Email (required), Address Line 1 (required, PlotNo/Street), Address Line 2 (Optional), Zip Code (required), City, State, Phone Number (required, +1), EBT (Optional), ISO Agent Reference (Optional), and ISO Merchant (Optional). A 'Modules and Privileges' section is located at the bottom right of the form, containing a list of modules: Steam, CloudPOS, My Customer, Troubleshoot, and Pinpad. A red hand cursor is pointing to the '+' button next to this list. An 'Add Store' button is located at the bottom right of the form. A note at the bottom left states: 'Fields marked with an asterisk (*) are required.'

Step 5: Enable the Modules & Privileges based on the merchant's requirement.



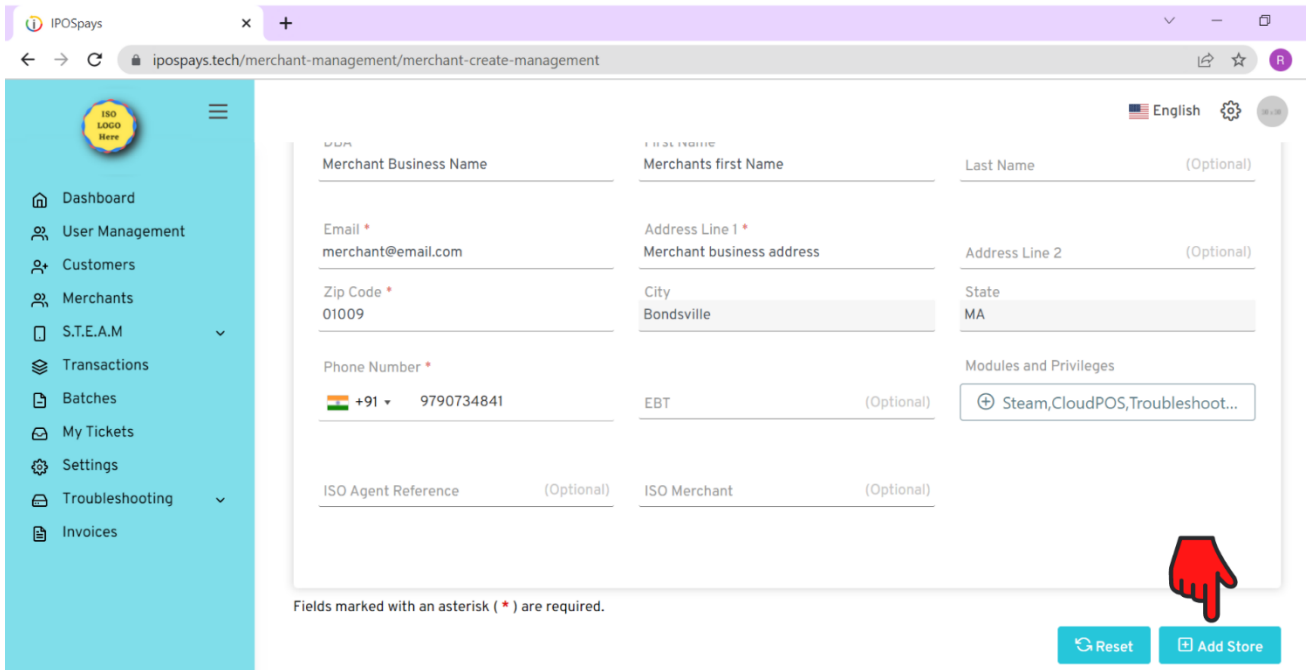
The screenshot shows the same 'Merchant Create Management' page as in Step 4. The 'Modules and Privileges' section is now expanded, showing a list of modules with checkboxes for enabling them. The modules listed are: Steam (checked), View Device (checked), Edit Param (checked), CloudPOS (checked), My Customer (checked), Troubleshoot (checked), and Pinpad (checked). A red hand cursor is pointing to the 'Steam' checkbox. The 'Add Store' button is still visible at the bottom right. The note 'Fields marked with an asterisk (*) are required.' is also present.

STEAM: Allows merchant to view/edit TPNS parameters.

CloudPOS: Allows merchant to accept virtual (online) payments

My Customer: Merchants can view/add their customers and invoices.

Step 6: After completing the Modules & Privileges, click on the Add store



Fields marked with an asterisk (*) are required.

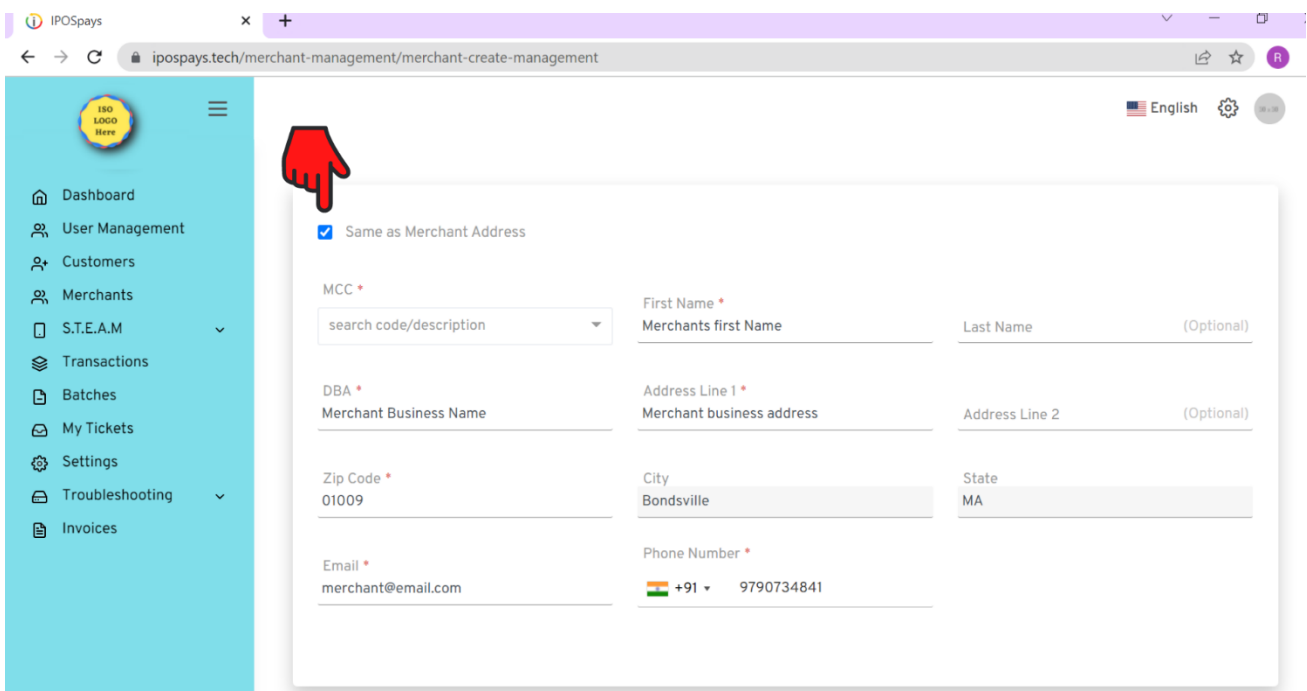
[Reset](#) [Add Store](#)

ADD STORE

Step 7: Merchant details are automatically pulled from the previous screen.

When the merchant address and the store address are not same, disable the “same as merchant address” option and fill out the store details

This email address is for the store manager. Use the user management section to set up access for the store manager.



Same as Merchant Address

MCC *

First Name * Merchants first Name Last Name (Optional)

DBA * Merchant Business Name Address Line 1 * Merchant business address Address Line 2 (Optional)

Zip Code * 01009 City Bondsville State MA

Email * merchant@email.com Phone Number * +91 9790734841

Step 8: Choose MCC from the dropdown

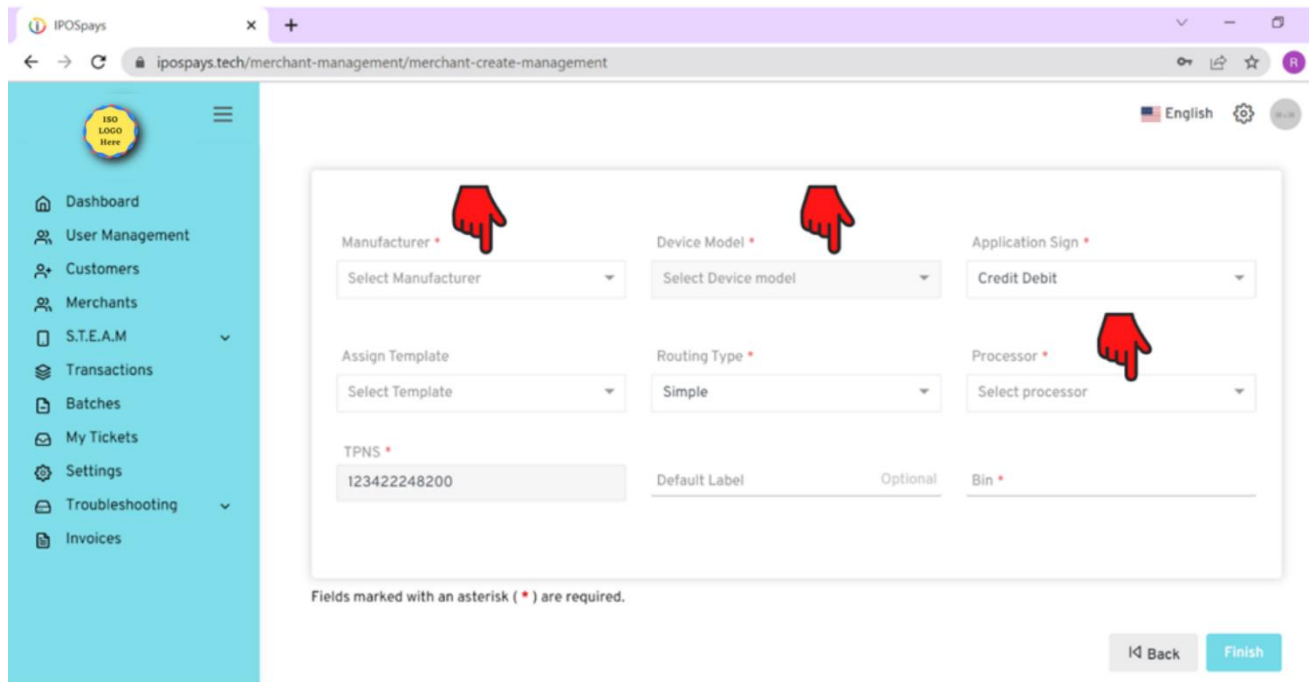
The screenshot shows the 'merchant-create-management' page in a web browser. A sidebar on the left contains navigation links: Dashboard, User Management, Customers, Merchants, S.T.E.A.M, Transactions, Batches, My Tickets, Settings, Troubleshooting, and Invoices. The main form area has a checked box for 'Same as Merchant Address'. The 'MCC' dropdown menu is open, showing a search bar and a list of options: 'Veterinary Services' (0742), 'Agricultural Cooperative' (0763), 'Landscaping Services' (0780), and 'General Contractors' (1520). A red hand icon points to the 'Veterinary Services' option. Other form fields include 'First Name', 'Last Name', 'Address Line 1', 'Address Line 2', 'City' (Bondsville), 'State' (MA), and 'Phone Number' (+91 9790734841).

Step 9: After completing the store details, click on the add device.

The screenshot shows the same 'merchant-create-management' page with all form fields filled. The 'MCC' dropdown now shows 'Fast Food Restaurants'. The 'Email' field contains 'merchant@email.com'. A red hand icon points to the 'Add Device' button at the bottom right. Below the form, there is a note: 'Fields marked with an asterisk (*) are required.' At the bottom, there are three buttons: 'Back', 'Reset', and 'Add Device'.

ADD DEVICE

Step 10: Choose the Manufacturer, Device Model & Processor from the dropdown.



Fields marked with an asterisk (*) are required.

Assign Template: *Template will not be available for first-time merchant creation. Saved templates can be chosen from the dropdown. You can save device parameters as a template @ step 21*

TPNS will be generated automatically

Default label is an option for providing meaningful representation for TPNS

Ex: 3rd billing counter POS Device

Profile Section:

iPOSpays support dual MIDs on the same device. Each MID can be given a convenient profile name - "With Fee" or "Without Fee". ISO can create one MID under traditional processing and another using Cash Discounting parameters with the processor.

If a transaction is performed with "Cash discounting Fee"/"Custom Fee" then MID under "With Fee" section is used to process. If the merchant chose to absorb the fee then the transaction is processed using MID under "Without Fee" profile.

It is ok to have only one profile or one MID. If you configure only "With Fee" profile but merchant decided to absorb the Fee then MID associate with "With Fee" profile will be used.

On the other hand if you configure only "Without Fee" but perform a transaction with Fee added, then the transaction will be declined.

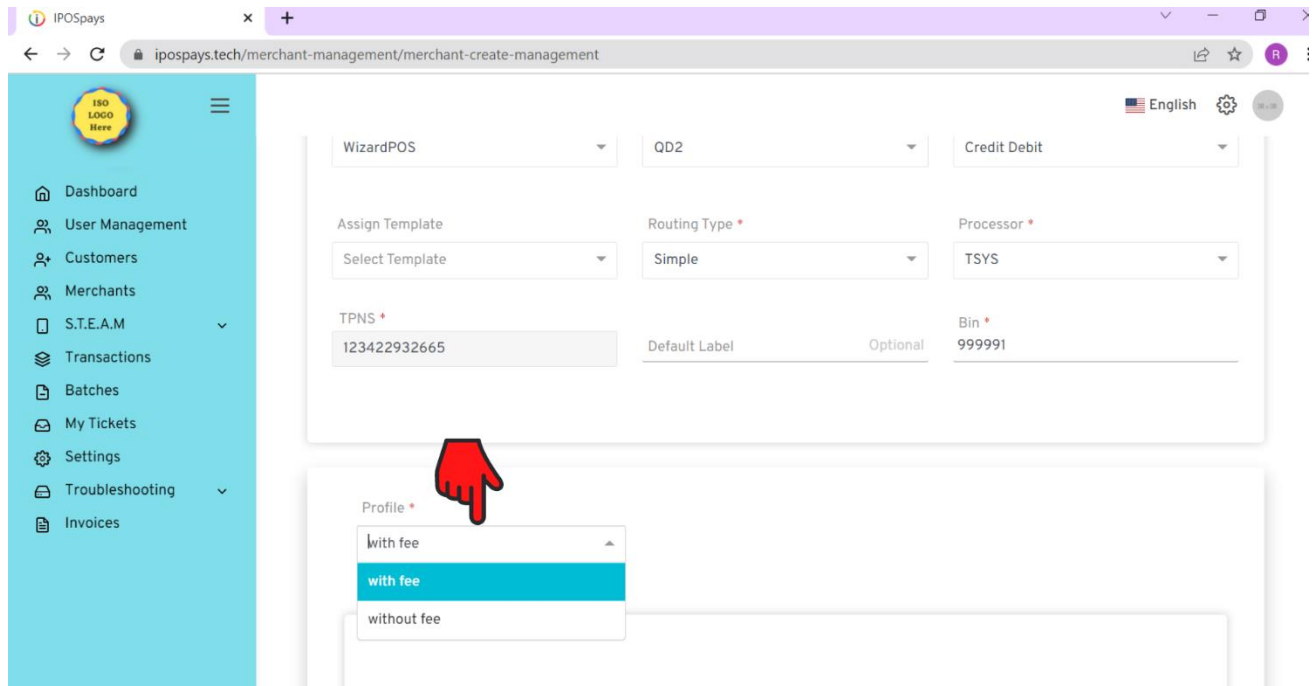
Thumb rule

Configure MID under "Without Fee" for traditional processing merchants

Configure MID under "With Fee" for cash discounting merchants

If there is a second MID set up for traditional then configure that under "Without Fee" profile

Step 11: Choose the profile and fill out the details.



! Use VAR SHEET information, If there are any errors or incorrect information, the finish button will not work.

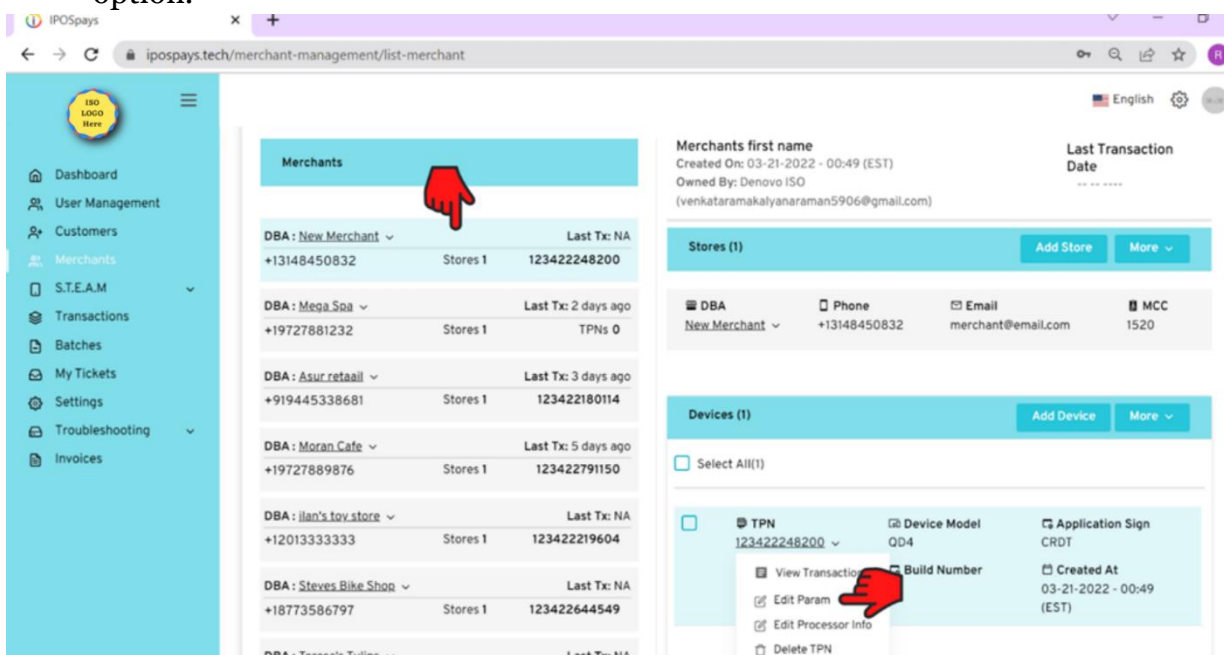
EDIT DEVICE PARAMETER

Step 12: After completing the device details, merchant creation is successful.

The last created TPNS available in the merchant section.

Step 13: Click on the last created merchant under the merchant section.

Click on the TPN number under the device section and choose the edit parameter option.



Step 14: Receipt Section:

POS Device receipt settings.

!It is mandatory to select at least one customer copy option

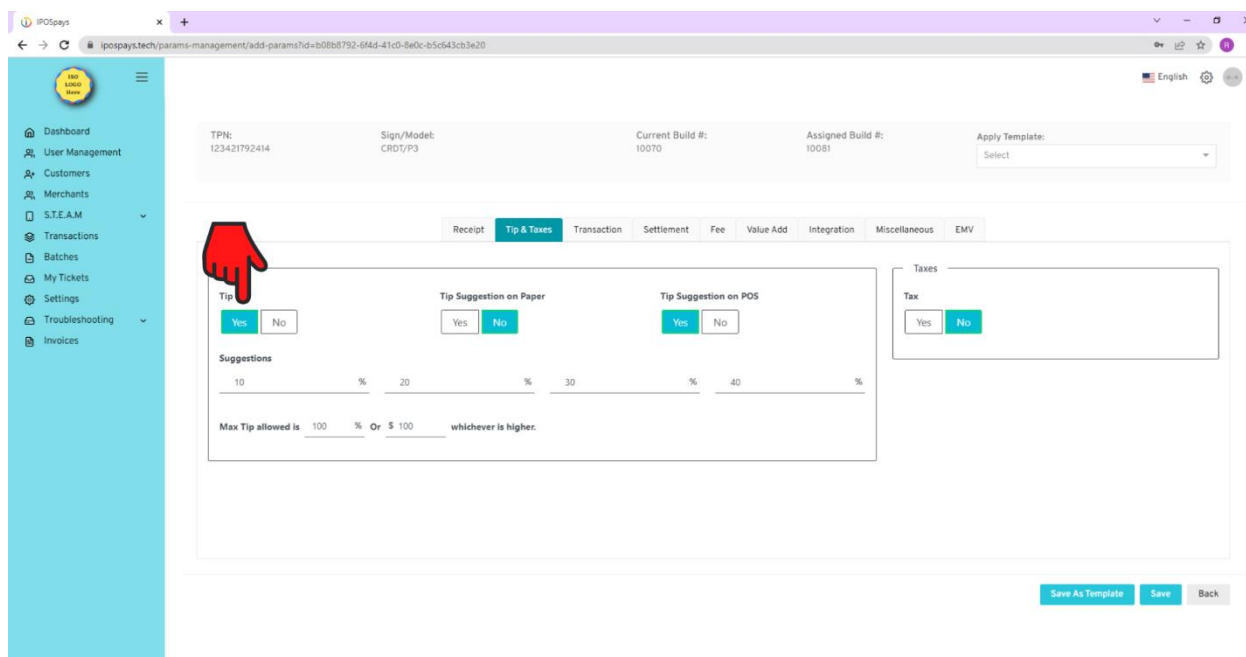
Step 15: Click on Tips & Taxes:

Choose yes under the tip.

It allows merchants do to tip adjust from the portal.

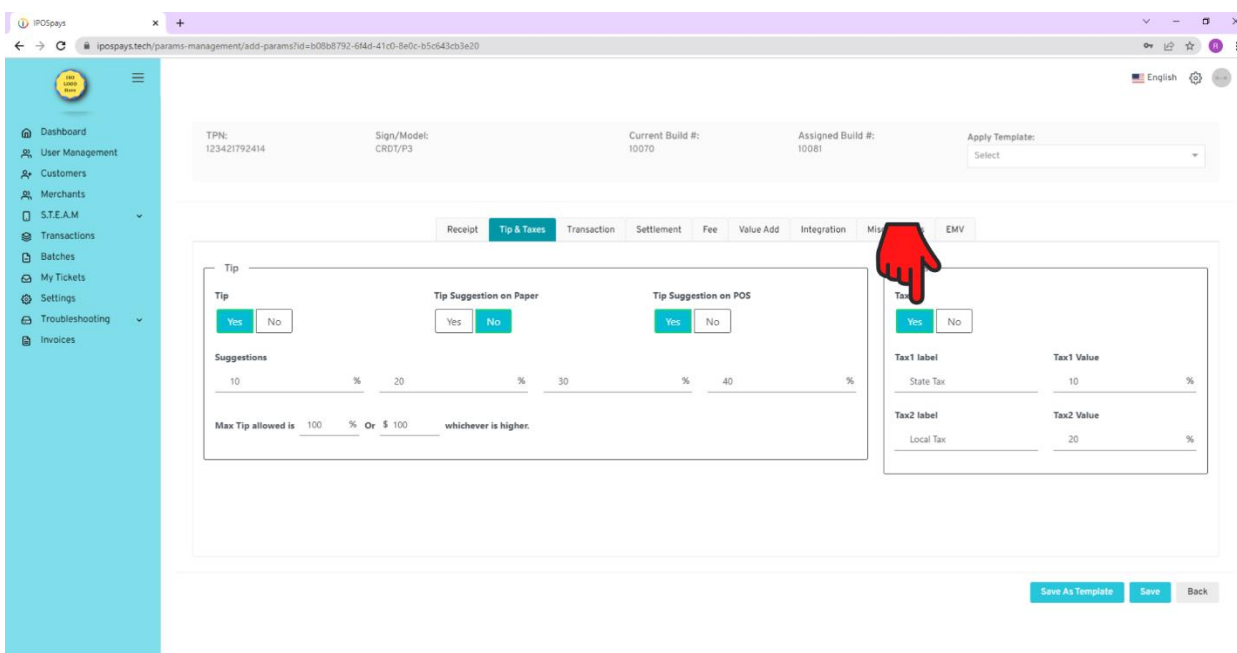
Tip suggestion on Paper: Tips choices will print on consumers' receipts.

Tip suggestion on POS: Consumers can choose and pay tips through the POS Device.



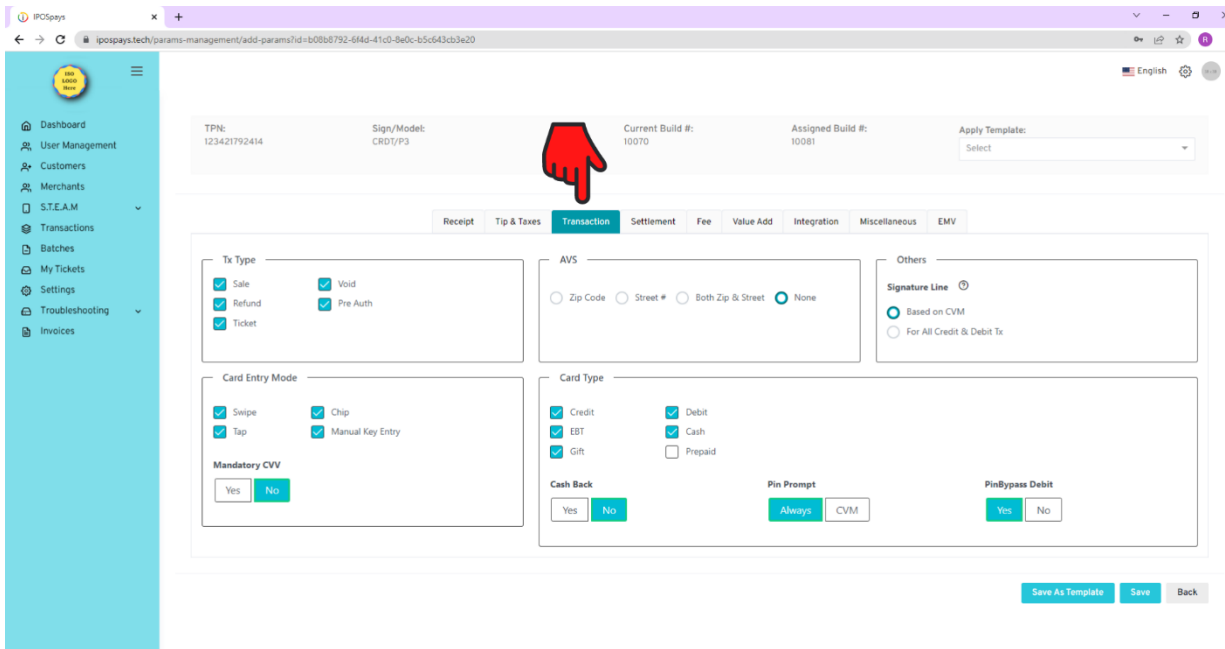
Step 16: Click on the Tax:

Maximum two tax label is available.



Step 17: Click on the Transaction

- Tx Type (Transaction Type) – Select the required transaction types, card entry modes & card types
- AVS, Signature Line, Cash Back, Pin Prompt, PinBypass Debit: Enable based on VAR SHEET



Step 18: Select Settlement

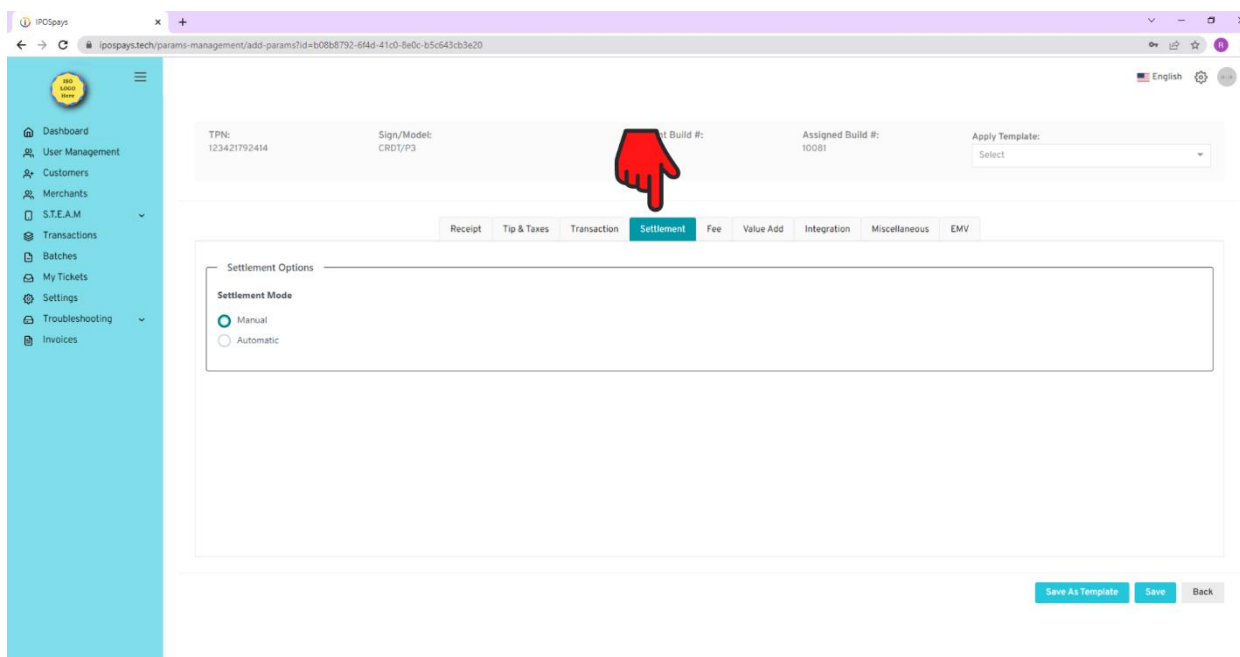
Manual Settlement:

Merchant must do the settlement activity from a POS device.

Automatic Settlement:

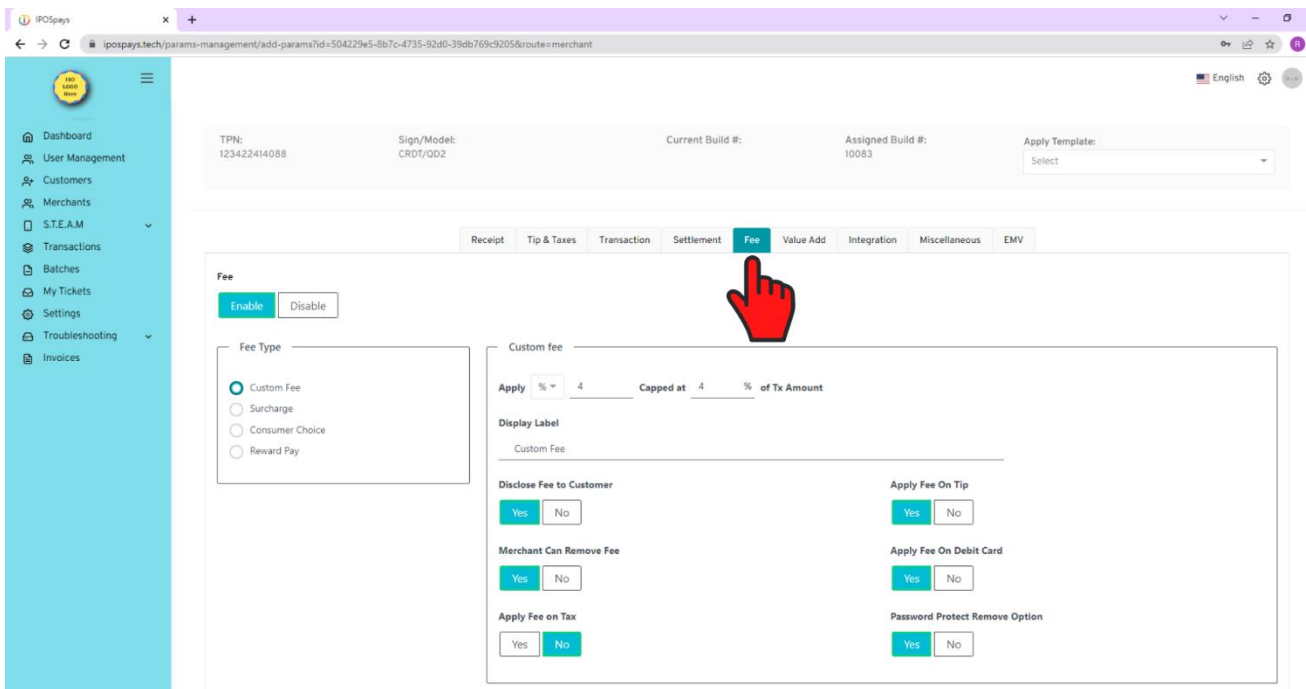
Choose the mode of automatic settlement & time.

If POS initiated: Choose the print receipt choice.



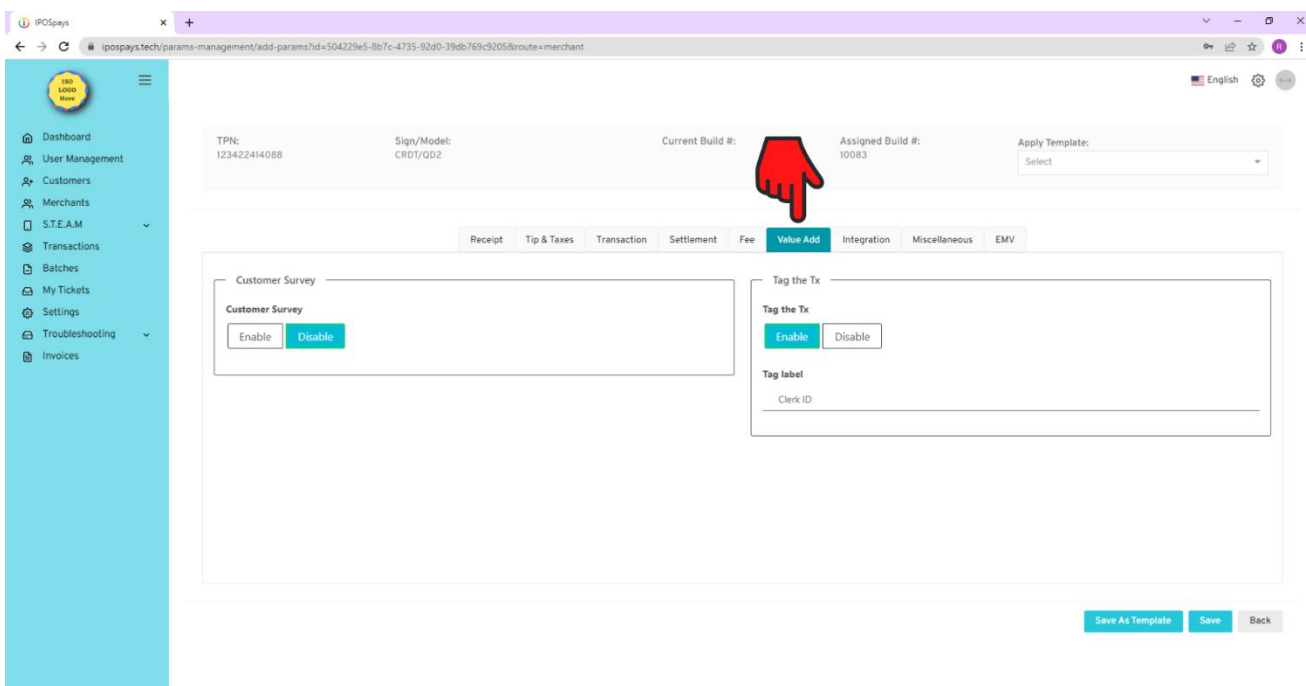
Step 19: Select Fee

Consumer choice: Consumers can choose whether to pay with cash or card
 Select consumer choice & enter the percentage of the fee.



Step 20: Click the Value Add

- Customer Survey: Merchants can collect feedback from customers by enabling this feature.
- Tag the Tx – This allows merchants to identify the transaction.
 Ex: In a restaurant, Merchant can enter the order id, table no, waiter id etc....

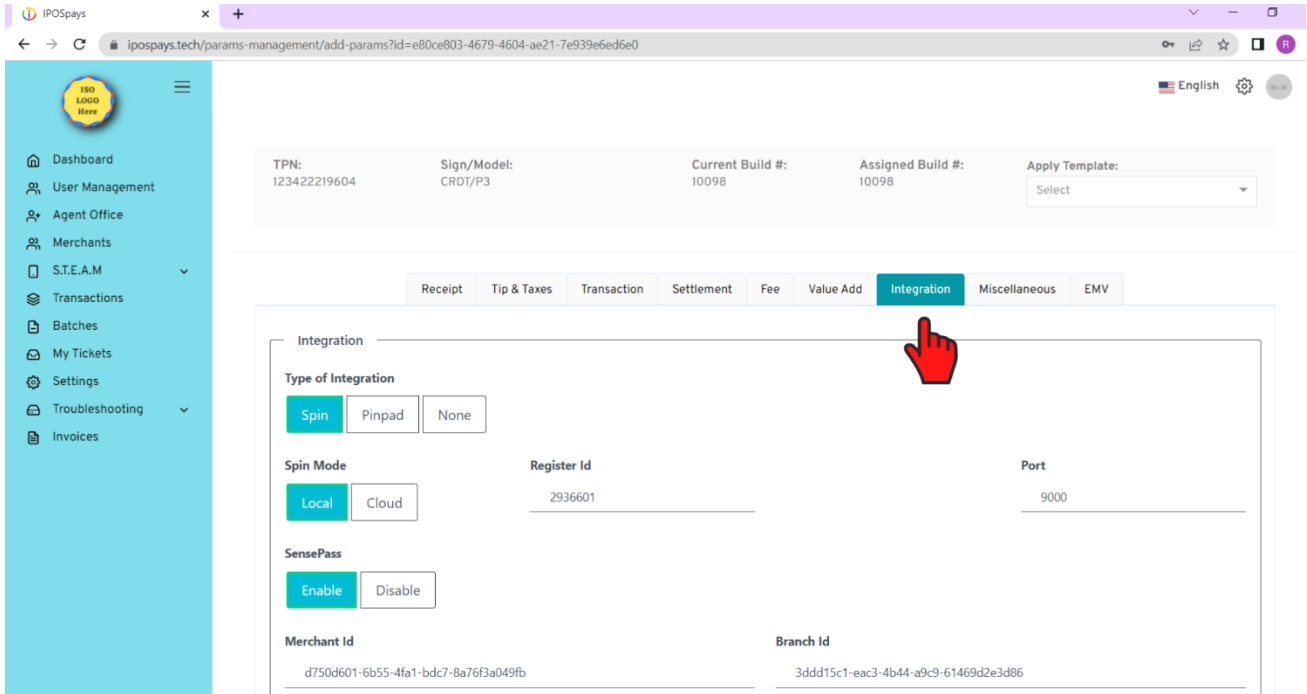


Step 21: Select Integration

Select the type of Integration (Spin or Pinpad)

Spin Local – Enter cash register’s register id & Port

Spin Cloud – Parameters will be assigned through Cloud

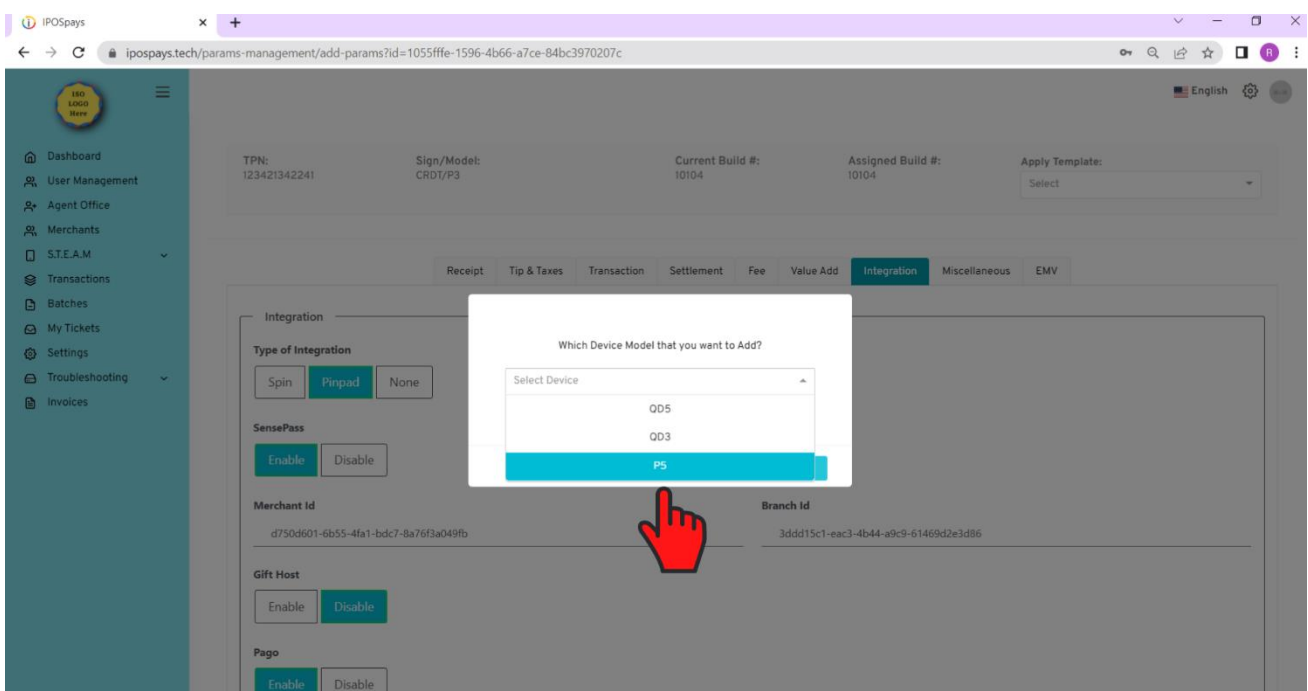


Pinpad: Select Pinpad

Choose the Slave device model.

Note: Same TPN Number should be entered on both Slave & Master devices.

Master Device parameters will be assigned to the Slave device automatically.



Step22: Click Save as Template, it allows you (ISO) to save the above settings and apply the same template for several merchants – refers to step no 10

