

# Adding Servers/Clerk in Portal



## STEP 1

Go to [www.online.valorpaytech.com](http://www.online.valorpaytech.com) and enter your login credentials.

Email

Password

Remember Me [Forgot Password](#)

**SIGN IN**

**VALOR**  
PAYTECH

## STEP 2

Select **Device Management** in the sidebar menu.

Dashboard

User Management

Transactions

Virtual Terminal

**Device Management**

Engage My Customers

Promotions

Valor Shield RT

Contact Us

My Tickets

My Setting

Reports

Downloads

**VALOR**

JOHN FAY'S TEST MERCHANT

\$0  
Last Month  
(Total Volume)

\$1.15  
Current Month  
(Total Volume)

\$0  
Current Day  
(Total Volume)

\$0.02  
Average Volume per day  
(last 3 Months)

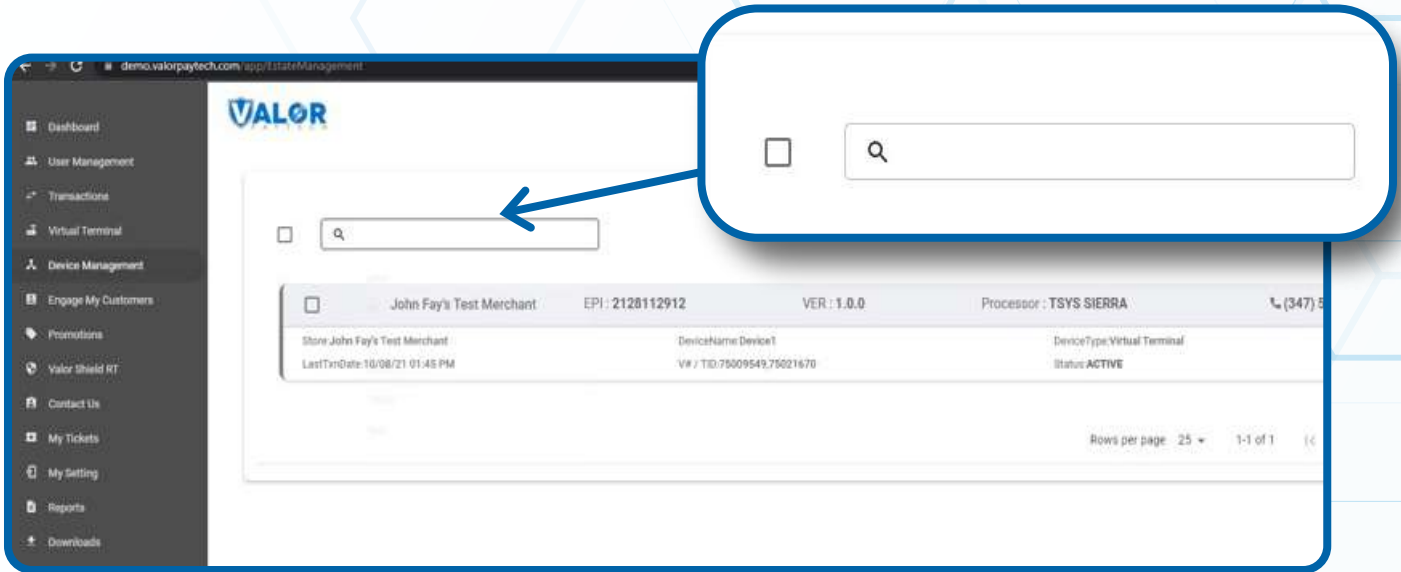
\$1.15  
Average Ticket  
(last 3 Months)

Current Month Transactions

Device Management

## STEP 3

Use **search bar** to look up the EPI you want to add servers/clerks to.



The screenshot shows the VALOR Merchant Portal interface. A search bar is highlighted with a blue box and an arrow pointing to it. Below the search bar, a table displays device information for 'John Fay's Test Merchant'. The table has columns for Merchant Name, EPI, Version, Processor, and Phone Number. A detailed snapshot of the device is shown below the table, including Store Name, Last Transaction Date, Device Name, Device Type, and Status.

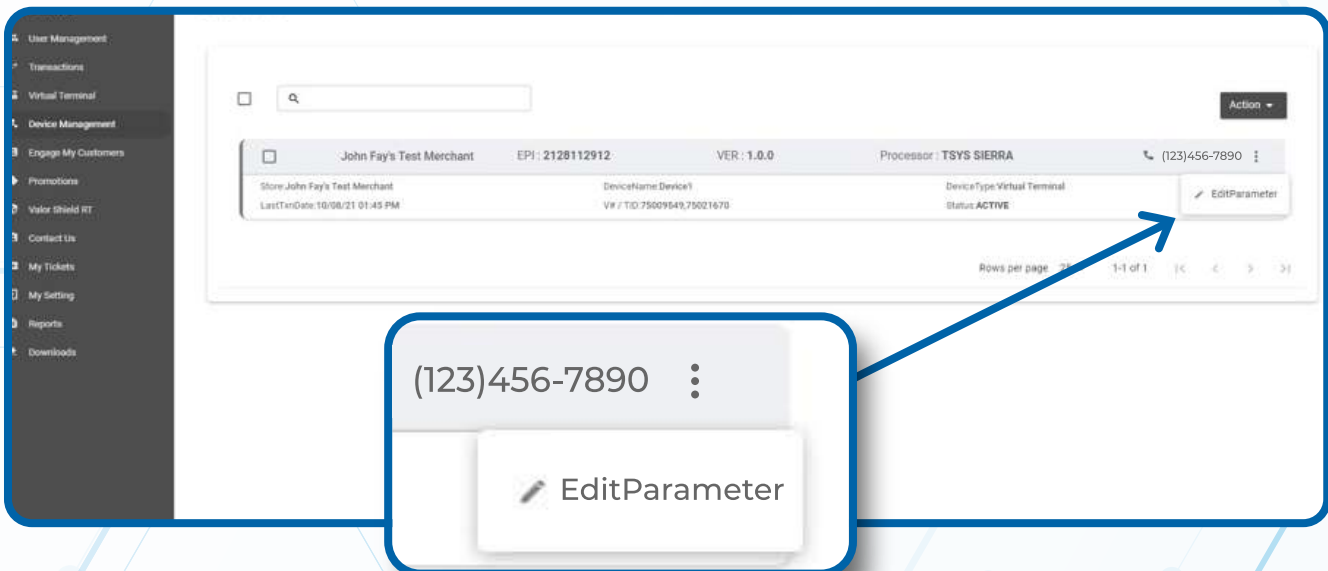
Merchant Name	EPI	Version	Processor	Phone Number
John Fay's Test Merchant	2128112912	1.0.0	TSYS SIERRA	(347) 5...

Store Name	Last Txn Date	Device Name	Device Type	Status
John Fay's Test Merchant	10/08/21 01:45 PM	Device1	Virtual Terminal	ACTIVE

## STEP 4

Once the device comes up, select the **vertical ellipsis (:)** on the top right of the snapshot and select **Edit Parameters**.



The screenshot shows the VALOR Merchant Portal interface. A blue box highlights the 'Edit Parameters' button, which is located in the top right corner of the device snapshot. A callout box shows the phone number '(123)456-7890' and the 'EditParameter' button.

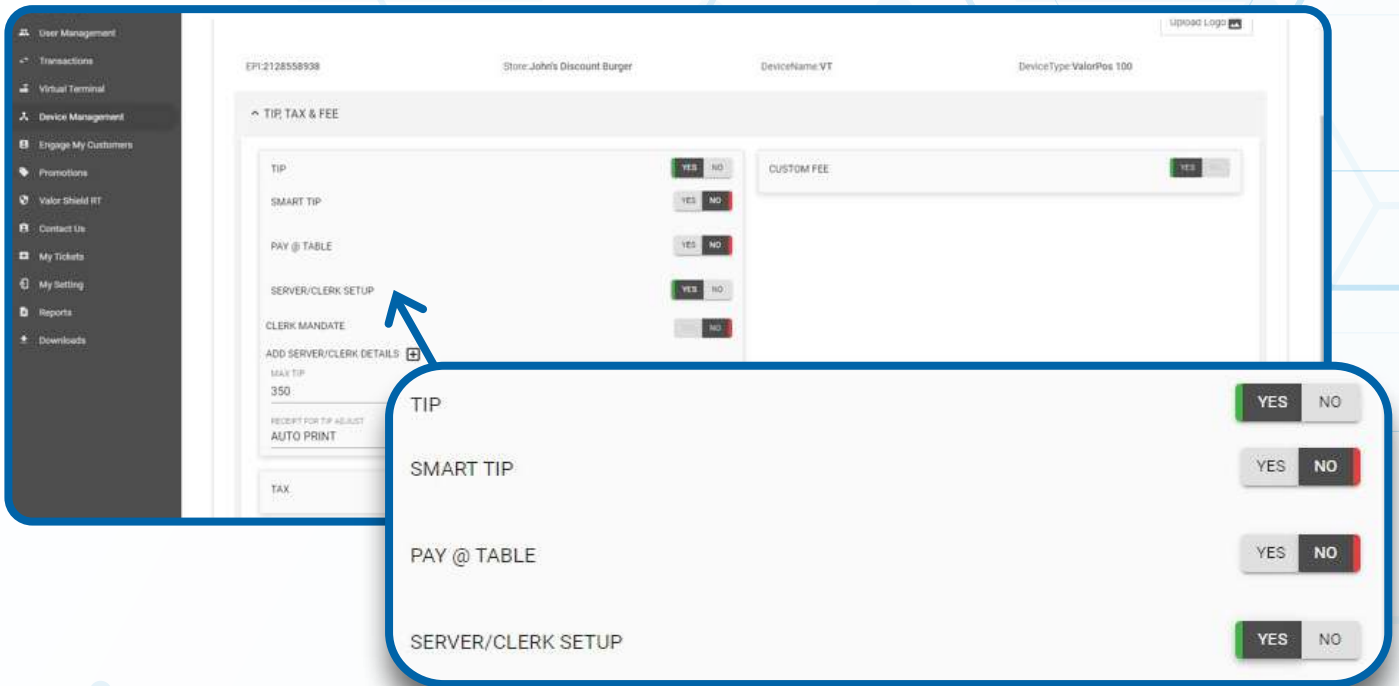
Merchant Name	EPI	Version	Processor	Phone Number	Action
John Fay's Test Merchant	2128112912	1.0.0	TSYS SIERRA	(123)456-7890	⋮

Store Name	Last Txn Date	Device Name	Device Type	Status	Action
John Fay's Test Merchant	10/08/21 01:45 PM	Device1	Virtual Terminal	ACTIVE	EditParameter

## STEP 5

Within the **Tip, Tax & Fee** section, enable **Tip** and then enable **Server/Clerk Setup**. Please note that the option to force the merchant to enter a Server or Clerk ID is available- it is labeled as **Clerk Mandate**.

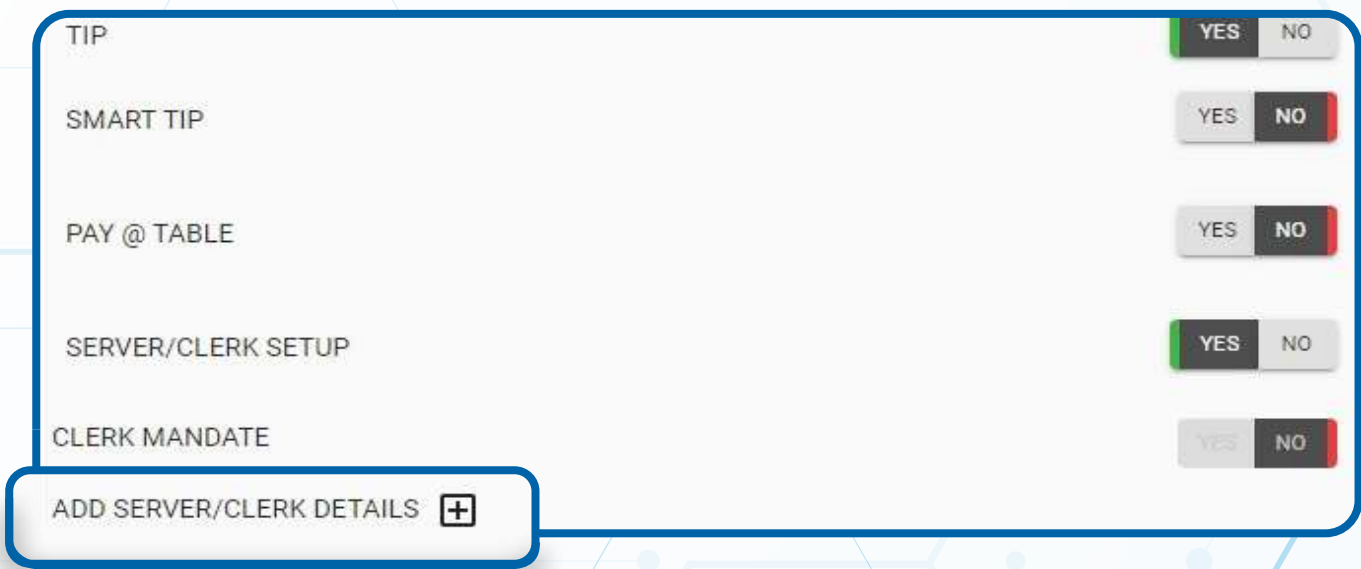


The screenshot shows the 'TIP, TAX & FEE' configuration page. The 'SERVER/CLERK SETUP' option is highlighted with a blue arrow. A callout box provides a closer view of the 'TIP' and 'SERVER/CLERK SETUP' settings, showing 'YES' buttons selected for both.

Setting	YES	NO
TIP	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SMART TIP	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PAY @ TABLE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SERVER/CLERK SETUP	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## STEP 6

Click the **+** to the right of **Add Server/Clerk Details**.

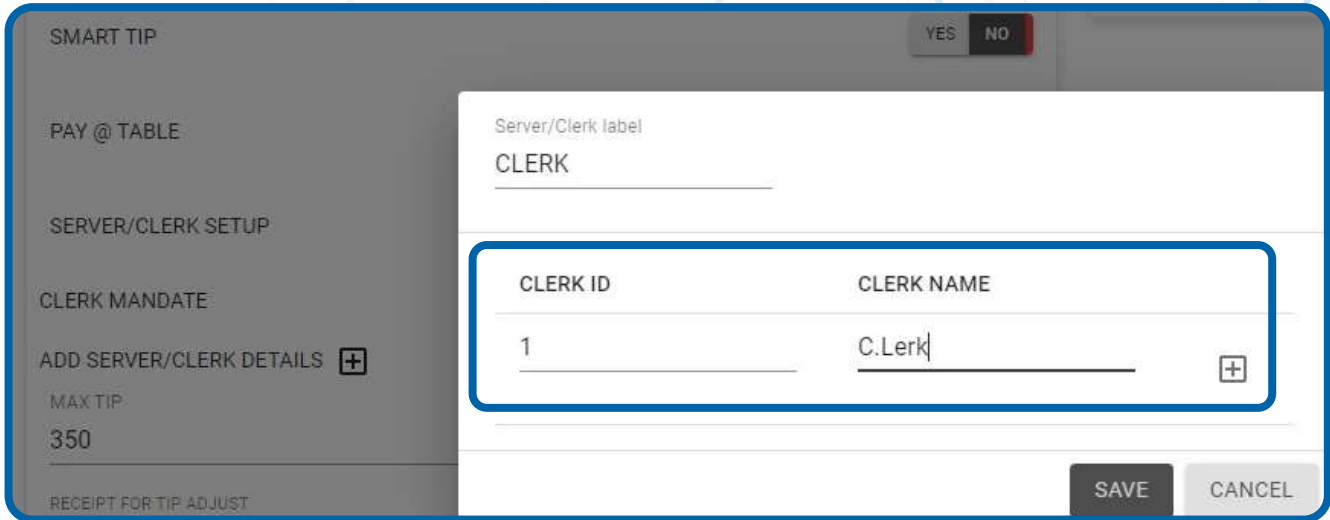


The close-up shows the 'ADD SERVER/CLERK DETAILS' button with a plus sign icon, highlighted by a blue callout box.

Setting	YES	NO
TIP	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SMART TIP	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PAY @ TABLE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SERVER/CLERK SETUP	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CLERK MANDATE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ADD SERVER/CLERK DETAILS <b>+</b>		

## STEP 7

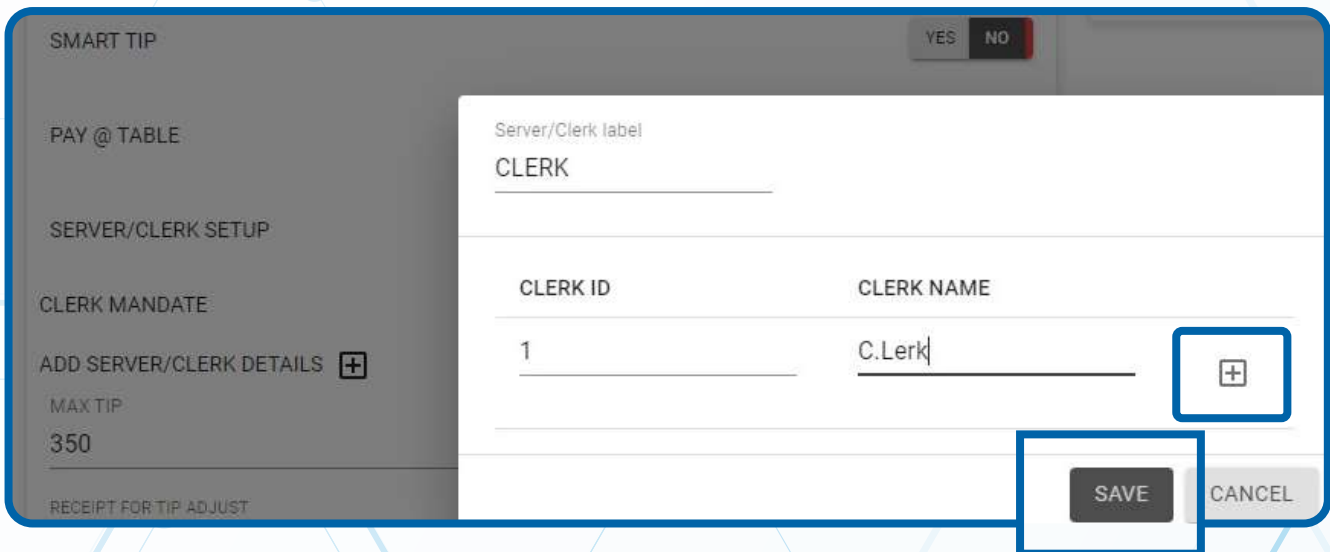
Enter the **Clerk ID** and **Clerk Name**.



The screenshot shows a software interface for setting up a clerk. On the left is a sidebar with menu items: SMART TIP, PAY @ TABLE, SERVER/CLERK SETUP, CLERK MANDATE, ADD SERVER/CLERK DETAILS (+), MAX TIP (350), and RECEIPT FOR TIP ADJUST. The main area has a 'Server/Clerk label' field containing 'CLERK'. Below it is a table with two columns: 'CLERK ID' and 'CLERK NAME'. The first row contains '1' and 'C.Lerk'. A blue box highlights these two input fields. At the bottom right are 'SAVE' and 'CANCEL' buttons. A 'YES NO' toggle is visible in the top right corner.

## STEP 8

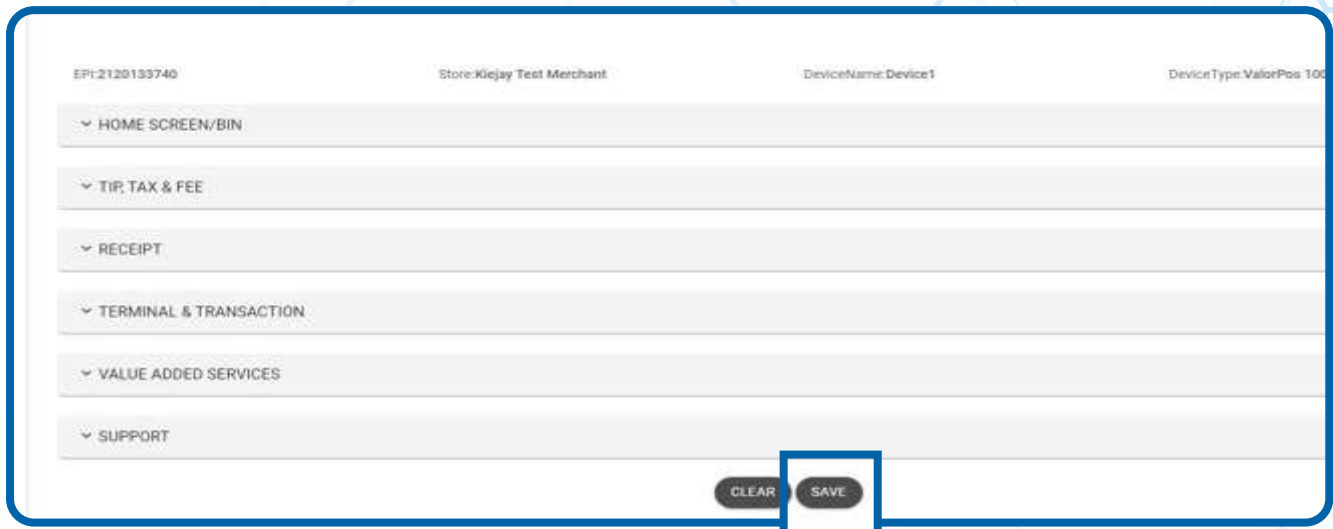
Press the **+** next to clerk name and select **Save**.



This screenshot is identical to the one in Step 7, but with additional blue boxes highlighting the plus icon (+) at the end of the 'CLERK NAME' field and the 'SAVE' button, indicating the next step in the process.

## STEP 9

Scroll down and select **Save**.



The screenshot shows a configuration interface with the following details:

- EPI: 2120133740
- Store: Klejay Test Merchant
- DeviceName: Device1
- DeviceType: ValorPos 100

The interface contains several expandable sections:

- HOME SCREEN/BIN
- TIR, TAX & FEE
- RECEIPT
- TERMINAL & TRANSACTION
- VALUE ADDED SERVICES
- SUPPORT

At the bottom right, there are two buttons: "CLEAR" and "SAVE". The "SAVE" button is highlighted with a blue square.

## STEP 10

After making parameter changes, you must perform a download on the device by pressing:

★ > 6 > OK button

