

# Navigating the Valor Merchant Portal



## Dashboard



This screen shows various data points pertaining to your merchant account. You can see last month's volume, the current month's volume, the current day's volume, the average volume per day (which takes the past 3 months into account), and the average ticket size. You will also be shown two charts, one showing last month's and the current month's transactional volume per day and displays it so that you can see a day by day comparison. The second will show the transactional volume per month.

## User Management

**RANDALL'S TEST STORE**

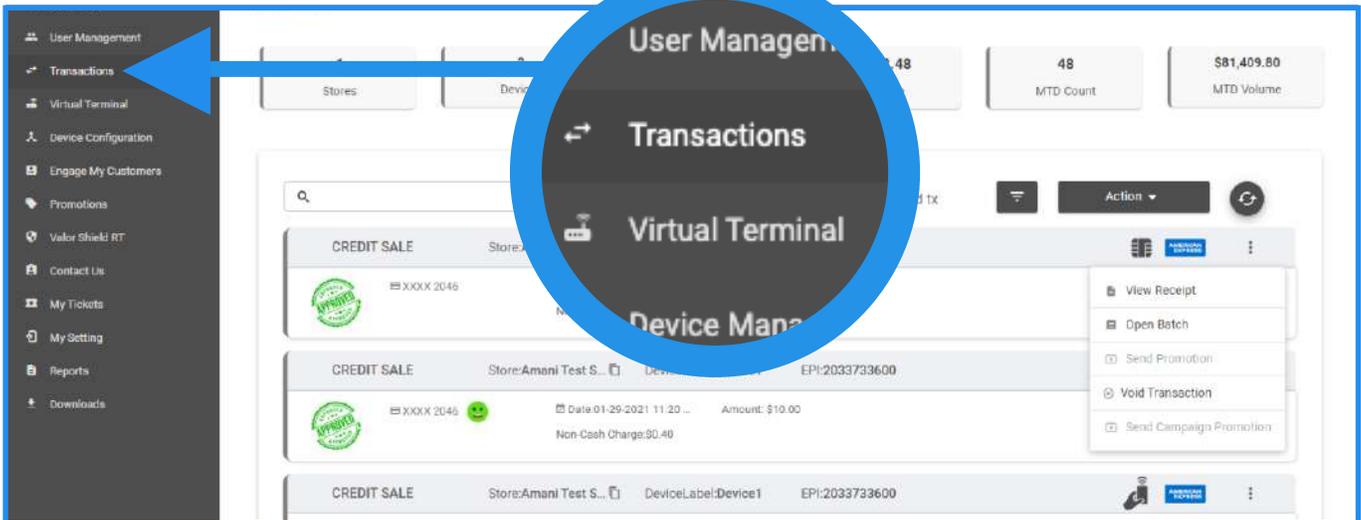
5 Users

Email	Full Name	Mobile Number	User Type	Owned By	Status	Action
randall@ing1@gmail.com	Randall Operator	(718) 581-9674	Operator	Randall's Test Store	ACTIVE	
muzamil@roos-4@gmail.com	MUZAMIL OPS	(516) 503-0500	Operator	Randall's Test Store	ACTIVE	
muzamil@roos-5@gmail.com	RANDALL OPERATOR	(718) 581-9674	Operator	Randall's Test Store	ACTIVE	
muzamil@valorpaytech.com	MUZAMIL OPS	(994) 290-0550	Operator	Randall's Test Store	ACTIVE	
michael@randallteststore.com	Michael Grottano	(516) 503-0506	Operator	Randall's Test Store	ACTIVE	
muzamil@roos-4@gmail.com	MUZAMIL IDDOOS OPERAT...	(646) 291-6211	Operator	Randall's Test Store	ACTIVE	

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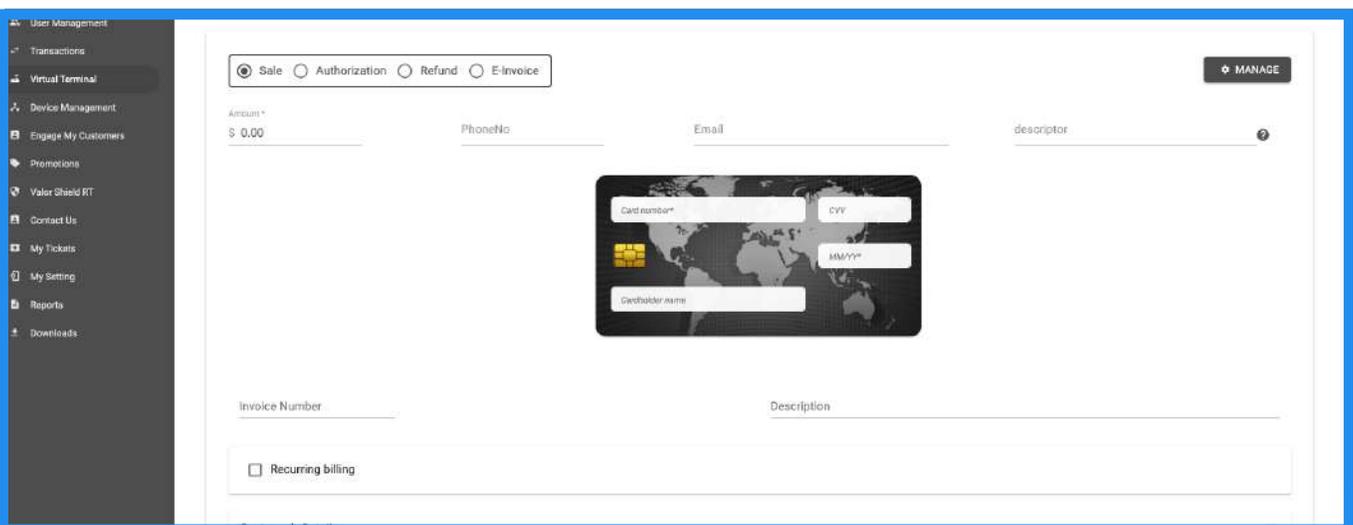
Allows you to add users and edit any user created within your merchant account. Each users' access and privileges can be assigned in this module.

# Transactions



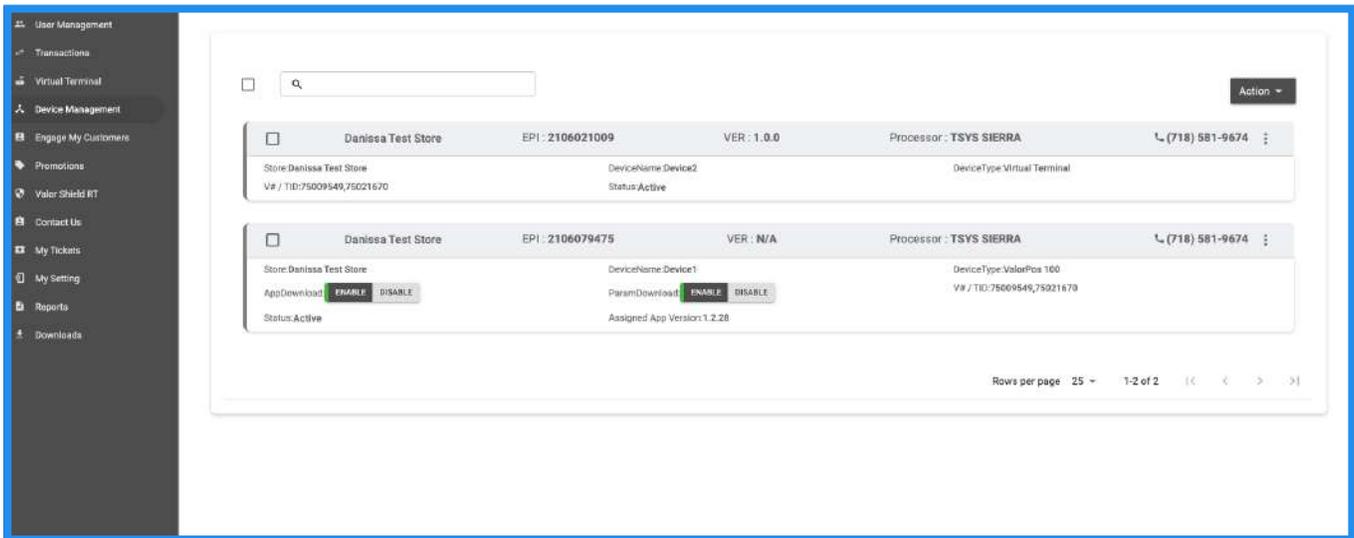
Allows you to see all transactions performed under your merchant account. You can view receipts, view open batches, settle batches, send promotions, send campaigns, void transactions, and adjust tips.

# Virtual Terminal



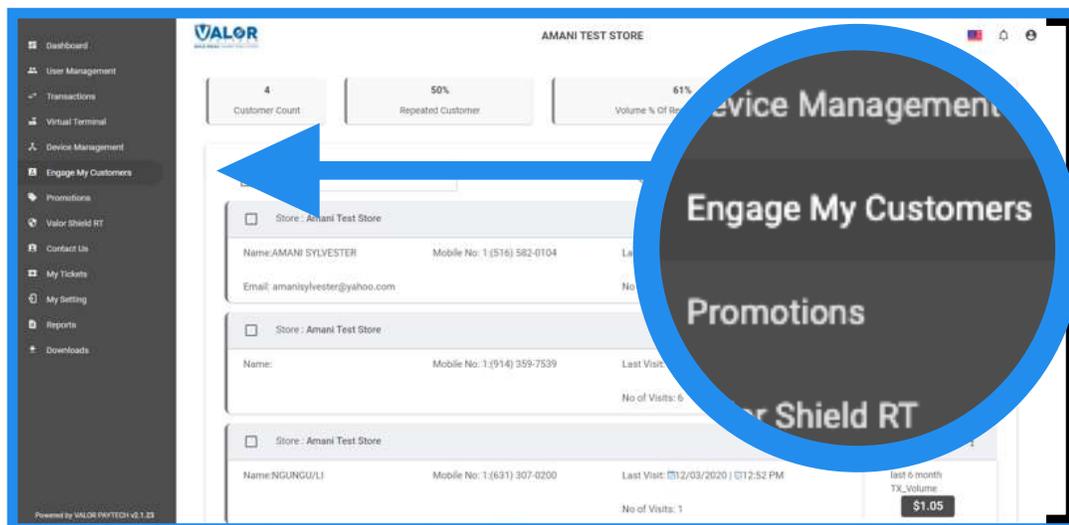
Allows you to perform sales, authorizations, refunds, create E-Invoices, and set up Recurring Billing. Please note that if you do not see Virtual Terminal in your sidebar menu, contact your ISO for more information.

# Device Management



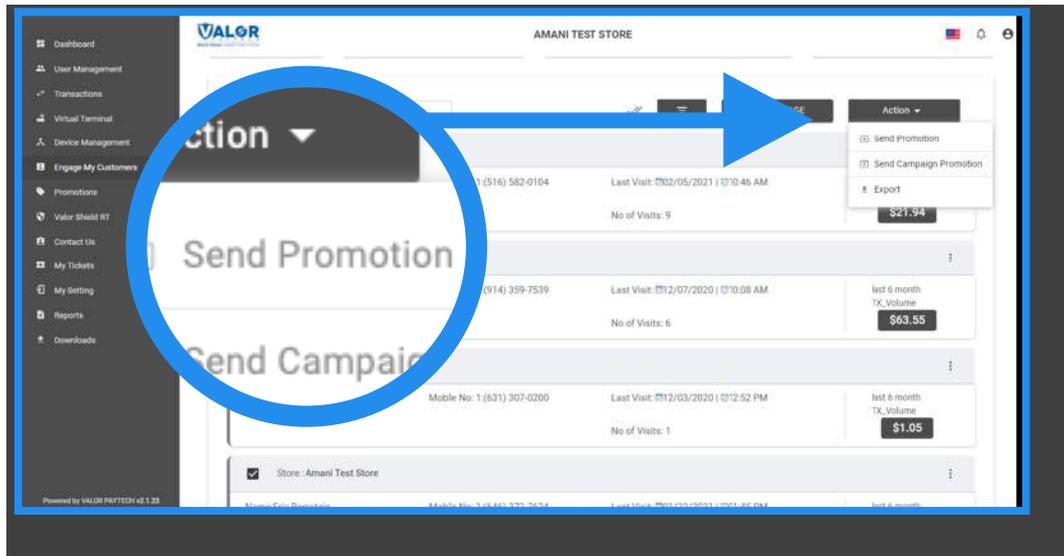
You can view and edit all devices associated with your merchant account. In this section, you are able to edit your device parameters, view each device's vitals (such as connectivity method and strength, battery percentage, app version, etc.).

# Engage My Customer



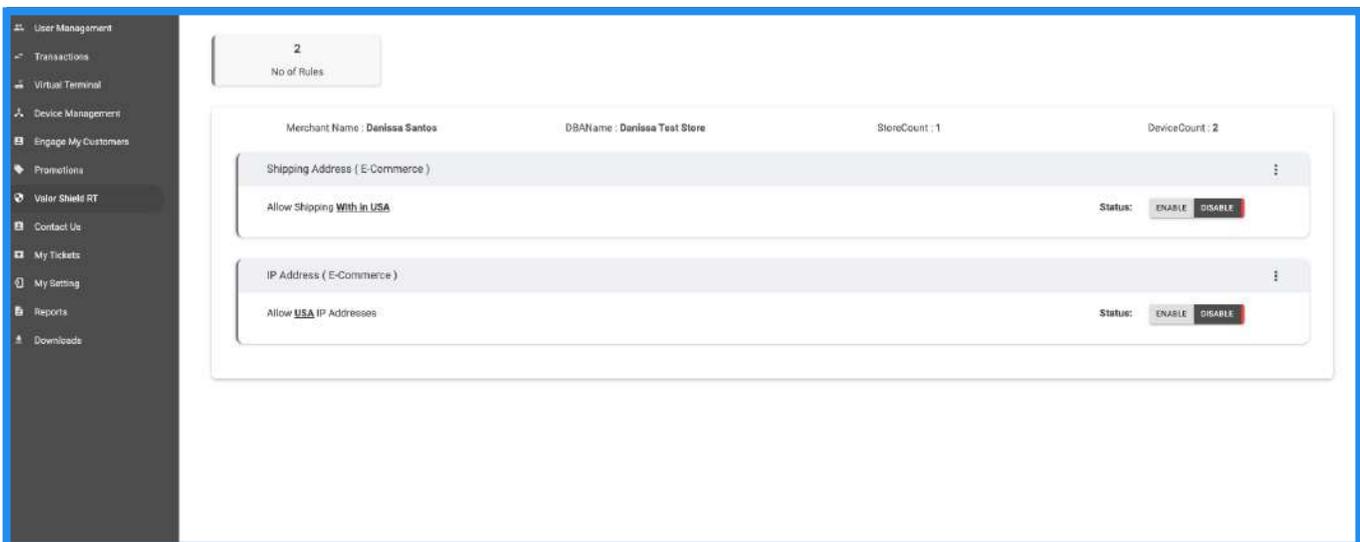
Tracks all information pertaining to customers and transactions, and groups everything together by customer. By collecting contact information, i.e., phone numbers, you are able to send promotional messages directly to customers based on a variety of customizable filter options such as Loyal Customers, Lost Customers, High Spenders etc.

# Promotions



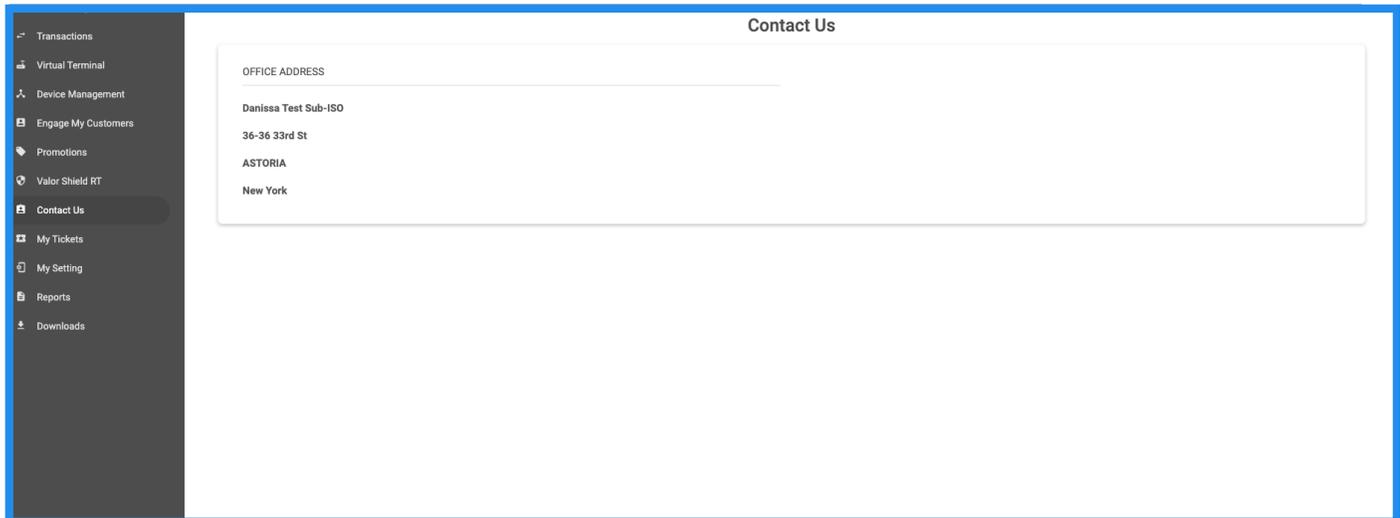
You can create promotional messages that will be delivered to customers either on printed receipts or SMS receipts. Within this module, you can create custom MMS or SMS templates/campaigns to be used in the Engage My Customers module. **Please note you must be enrolled in Engage My Customers to access Promotions.**

# Valor Shield RT



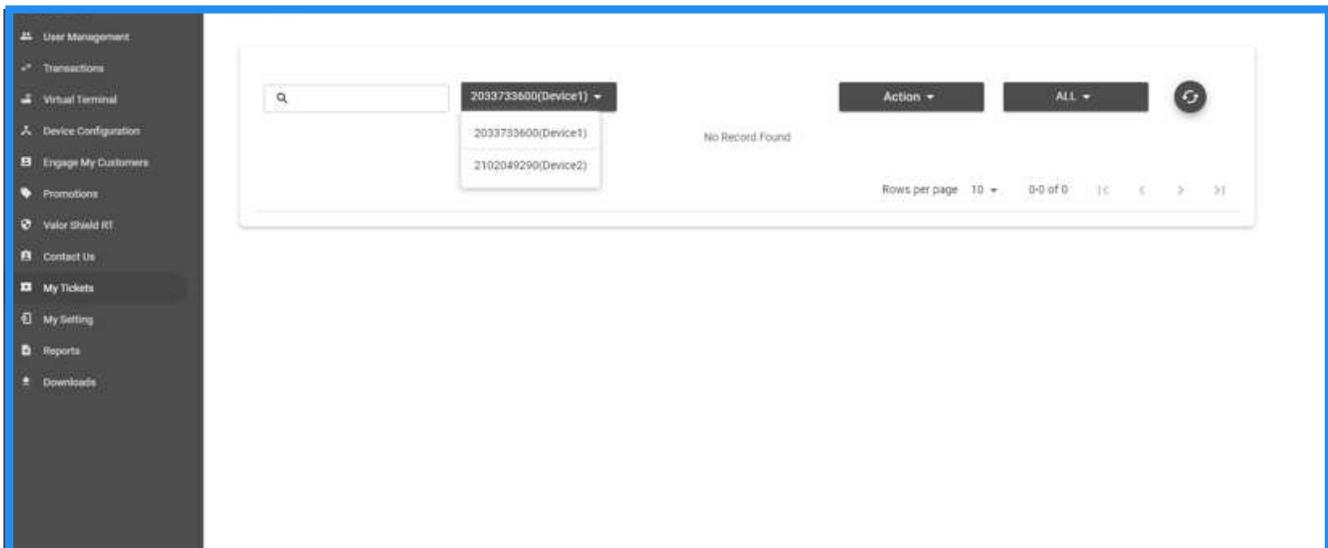
E-Commerce merchants are able to enable/disable the acceptance of online orders based on the location of shipping addresses and/or IP addresses.

# Contact Us



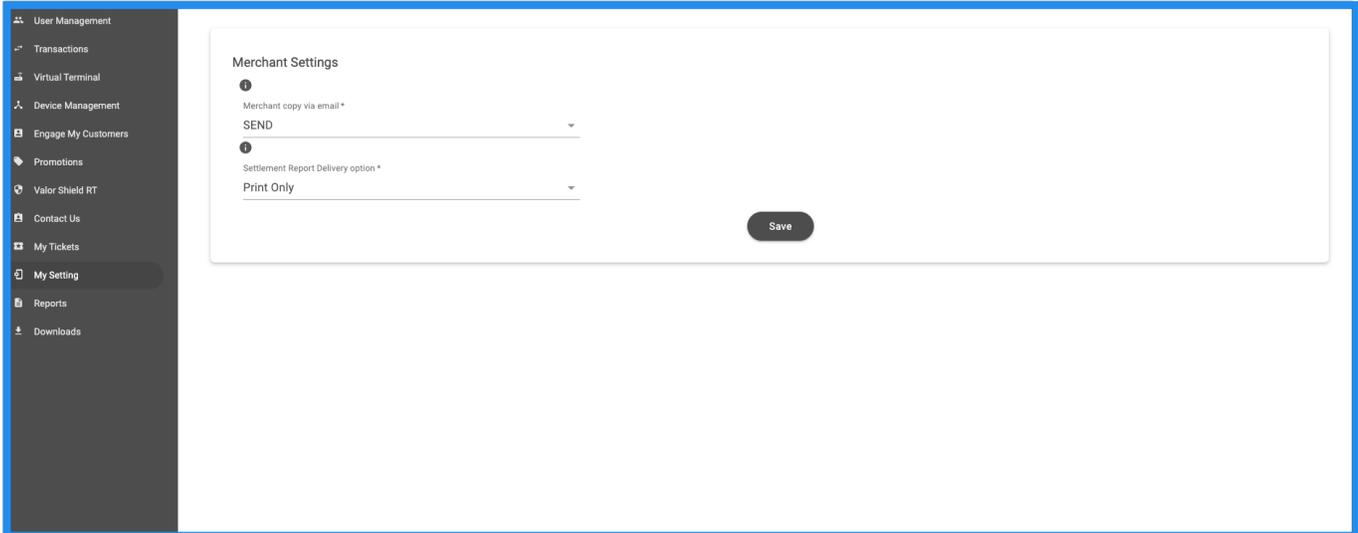
You can see your ISO's contact information. This information can also be seen on the terminal when the **Call Me** icon is pressed.

# My Tickets



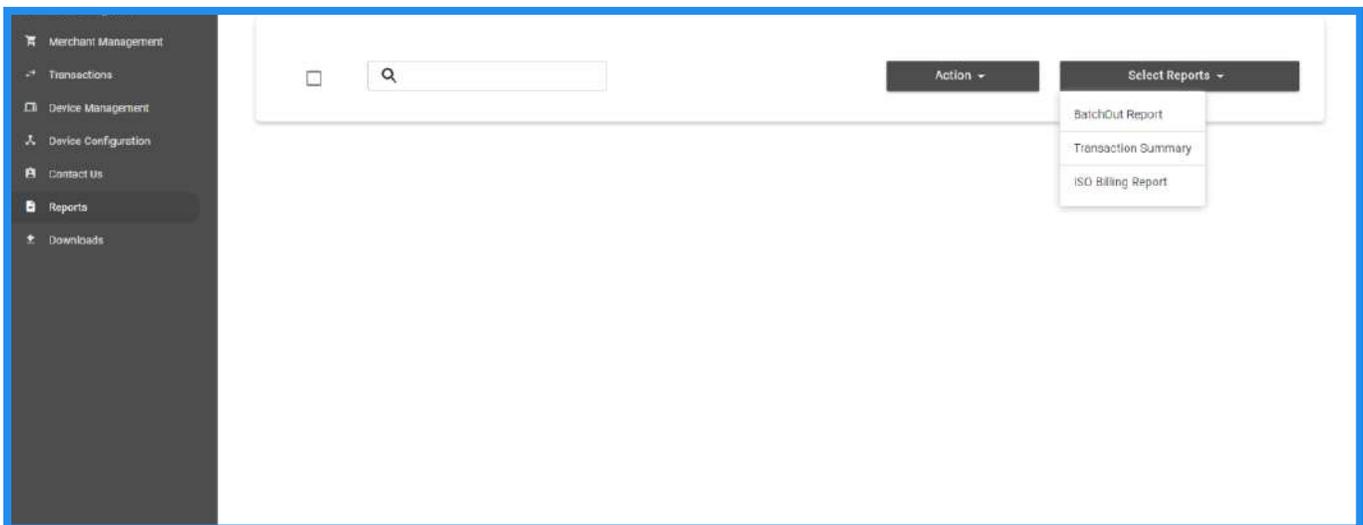
You are able to create, edit, and view all support tickets created on your account. You are able to give your ISO a general idea of what the problem is in regards to, you can provide additional details, and a call back number.

# My Settings



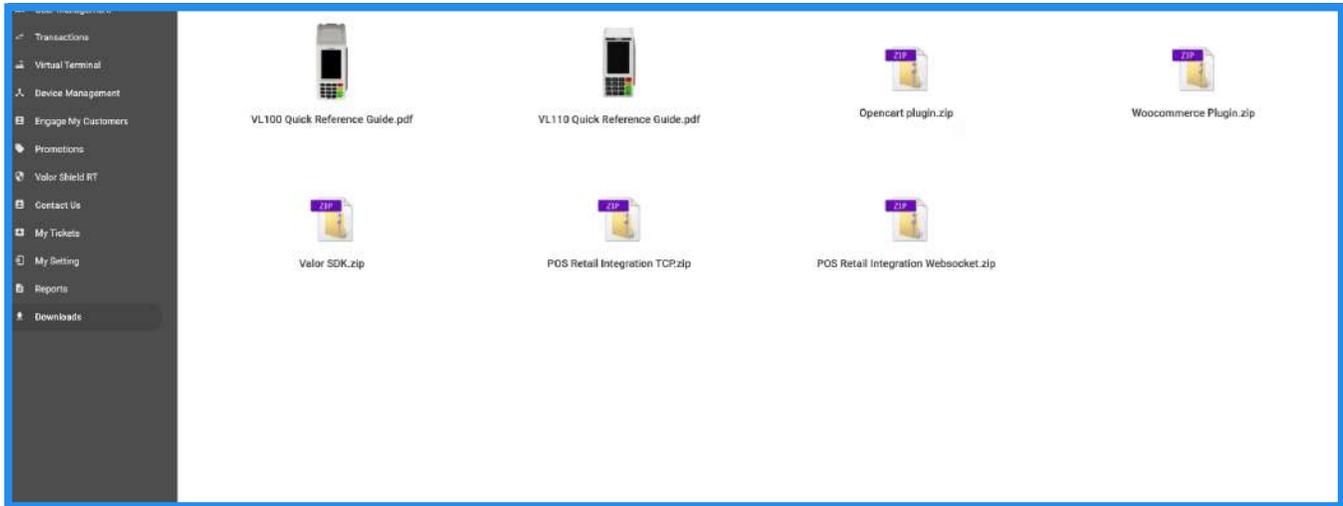
You have options for receipts for all transactions performed to be emailed to the email address used in the merchant build in and have settlement reports emailed, printed, or both.

# Reports



You can view and export your transaction summary and batch reports in Excel format.

# Downloads



You can download user guides, plugins and the Valor SDK.