

Perform a Quick Board



Step 1

The screenshot shows a dashboard with a sidebar menu on the left and a main content area. The sidebar menu includes: Dashboard, User Management, Merchant Management, Transactions, Remote Diagnostics, Device Configuration, Valor Shield RT, Contact Us, Support, My Setting, Reports, and Downloads. The main content area displays a summary of merchant statistics: 66 Total Merchants, 31 New Merchants (last 30 days), 80% Active Merchants (last 30 days), \$1,758,346 Last Month (Total Volume), and \$4,021,927 Current Month (Total Volume). Below the summary is a table of merchants with columns for search, sort, add, and action. The table lists three test stores:

Store Name	Owned By	Merchant Name	Contact Info	Device Count	Monthly Volume	Last Tin Date	Status
Amani Test Store	Owned By Valor Support	Amani Sylvester	(516) 582-0104	2	\$0.00	01-29-2021	ACTIVE
Randalls Test Store	Owned By Randalls Test Sub-ISO	Randall Singh	(718) 581-9674	3	\$0.00	01-29-2021	ACTIVE
Valor Test	Owned By Eric's Processing Platform	Eric Bernstein	(646) 372-7624	3	\$0.00	01-29-2021	ACTIVE

Select **Merchant Management** in the sidebar menu. Select **Add**, then **Quick Board**. This will allow you to board one merchant and one device.

Step 2

The screenshot shows a form for adding a merchant. The sidebar menu is visible on the left, with 'Merchant Management' selected. The form fields are:

- Devices* (dropdown)
- Offices (dropdown, currently showing 'Valor Support(Me)')
- DBA* (text input)
- Legal Name* (text input)
- First Name* (text input)
- Last Name* (text input)
- Email* (text input)
- Phone* (text input)
- Address* (text input)
- Zip Code* (text input)
- City* (text input)
- State (dropdown)
- Time Zone* (dropdown)
- Display Label* (text input)
- MCC Code* (dropdown)
- Processor* (dropdown)

At the bottom of the form is a button labeled '+ Add Merchant'.

Select your device type, select the Sub-ISO office the file belongs to (if any). Enter the merchant's information, the MCC code, time zone, and select the Processor.

Step 3

The screenshot shows a web interface for Merchant Management. On the left is a dark sidebar with a menu containing: User Management, Merchant Management (selected), Transactions, Remote Diagnostics, Device Configuration, Valor Shield RT, Contact Us, Support, My Setting, Reports, and Downloads. The main content area is a form with the following fields: Device* (dropdown), DBA* (text), Last Name* (text), Address* (text), State (dropdown), MCC Code* (dropdown), Legal Name* (text), Email* (text), Zip Code* (text), Time Zone* (dropdown), First Name* (text), Phone* (text), City* (text), Office (dropdown menu showing 'Valor Support(Me)'), and Device1 (dropdown). At the bottom left of the form is a small '+ Add Merchant' button. A blue box highlights this button, and a line extends from it to a larger '+ Add Merchant' button located in a separate box on the right side of the form.

Once you select the Processor, you will see the different fields at the bottom of the form. This information must match exactly what is on the VAR sheet. If anything is incorrect, the merchant will not be able to process transactions. Once complete, select **Add Merchant**. If you want to edit the parameters later, go to **Device Management**, search for the device, select the **ellipsis (:)** on the top right of the snapshot, then click **Edit Parameters**. If you want to limit the merchant's access in the portal you will have to go to **Merchant Management** and edit the modules the Merchant has access to.