

Perform a Full Board



Step 1

The screenshot shows a dashboard with a sidebar on the left containing menu items: User Management, Merchant Management, Transactions, Remote Diagnostics, Device Configuration, Valor Shield RT, Contact Us, Support, My Setting, Reports, and Downloads. The main area displays summary statistics: 66 Total Merchants, 31 New Merchants (last 30 days), 92% Active Merchants (last 30 days), \$1,758,346 Last Month (Total Volume), and \$4,021,927 Current Month (Total Volume). Below the statistics is a table of merchants:

Store Name	Owner	Phone	Device Count	Last Txn Date
Michael's Test Store	Michael Gortman	(316) 503-6500	1	01/29/2021
Dale Test Store	Dale Clodfelter	(373) 692-4913	2	01/29/2021
Amari Test Store	Amari Sylvester	(316) 582-0104	2	01/28/2021

Select **Merchant Management** in the sidebar menu. Click on **Add** and select **Full Board**. This will allow you to board multiple stores and devices.

Step 2

The screenshot shows a contact information form with a progress indicator at the top: 1 Contact, 2 Store, 3 Device, 4 Modules. The form fields are:

- Office: Valor Support(Me) (dropdown)
- DOB *
- Legal Name *
- First Name *
- Last Name *
- Email *
- Phone *
- Address *
- Zip Code *
- City *
- State *
- TimeZone *

A "Next" button is located at the bottom right of the form.

Enter the **contact information** for the merchant account/business owner. Once completed, click **Next**.

Step 3

The screenshot shows a multi-step process with four steps: Contact, Store, Device, and Modules. The 'Store' step is active. The form contains the following fields:

- Store: New Store (dropdown)
- Store #: Randall's Test Store#3
- Merchant #: Randall
- Phone #: 718-581-9674
- Address #: 3636 33rd Str
- City #: ASTORBA
- State #: NY - New York
- Timezone #: EST
- MCC Code: (empty)

Buttons: + Add Store, Prev, Next.

Most of the information in this section will be taken from the Contact section. You will only be required to enter the MCC Code. When finished, select Add Store to continue to the Devices section. **NOTE: THE MCC CODE MUST MATCH THE SIC CODE FROM THE VAR SHEET. IF THEY DO NOT MATCH, THE MERCHANT WILL NOT BE ABLE TO PERFORM TRANSACTIONS.**

Step 4

The screenshot shows the 'Device' step in the configuration process. The form contains the following fields:

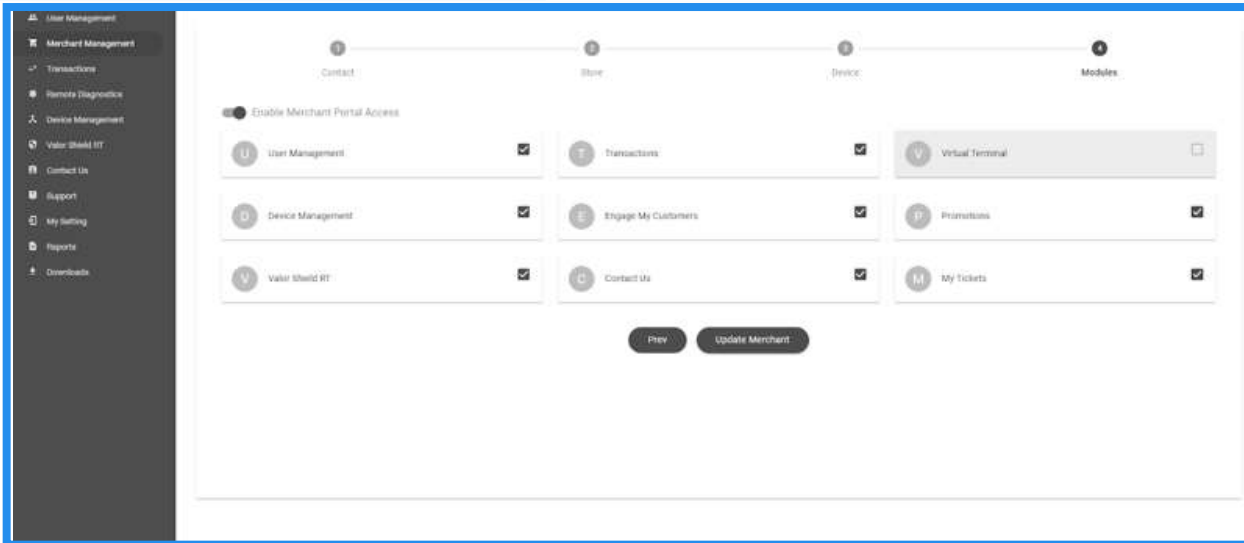
- Device Name: New Device (dropdown)
- Device #: 2102996342
- Device Type: Handheld POS
- Processor: TSY5 SIERRA
- Device #: ValorP66 110 (dropdown)
- Device Name: Device4 (dropdown)

CASH DISCOUNT/SURCHARGE	TRADITIONAL	GIFT CARD	
WD % *	V#number *	Store no *	EST no
Term no *	Sn Number *	Industry *	Agent Bank Number *
Chain *	Agent *	surcharge % *	

Buttons: + Update Device, Prev, Next.

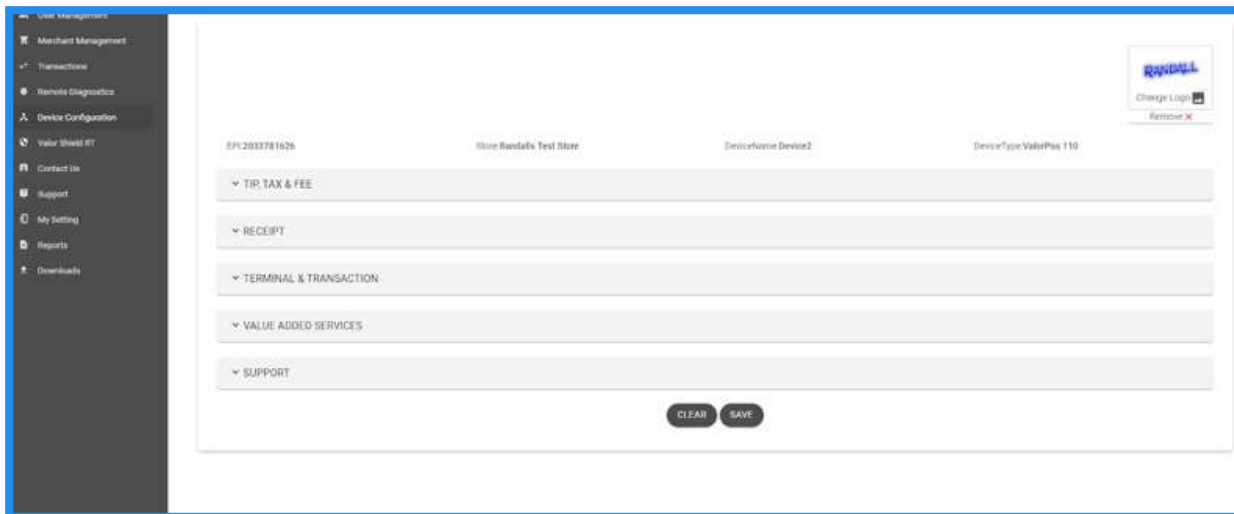
Select the **device type** and **processor**. Enter the VAR sheet information. Once complete, double check to make sure all information is correct. If anything is entered incorrectly, the merchant will get the **"Host Profile Not Configured Properly"** error message when they try to perform transactions. Once complete, select **Next**.

Step 5



Select the **Modules** you want the merchant to have access to. Once done, click **Next**. The merchant will get an email and a text message with a link to create their password.

Step 6



Once the Merchant has been boarded, the next step is to set the devices' parameters in **Device Management**. There you set your tip, tax, and custom fee settings, receipt options, terminal and transaction settings, surveys, additional inputs, and enter support phone numbers.

Step 7



Setting Up your Device for Deployment

- Power the device on.
- Select Yes when prompted for DHCP.
- Enter your SSID and enter your WiFi password, connect to Ethernet or dial connection, or connect to your GPRS SIM card.
- Enter your EPI to begin your Remote Key Injection and press the OK button.
- Run a test transaction and deploy your device with the receipt in the device.