

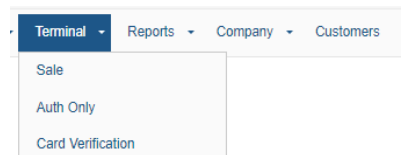
TranSafe VT Guide

Virtual Terminal

The VT is the screen where you can run transactions.

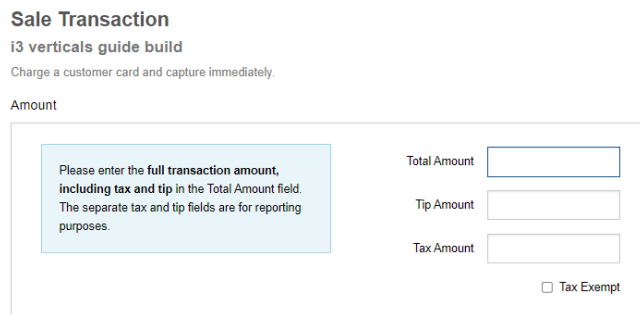
Sale

1. Click **Terminal** and then **Sale**



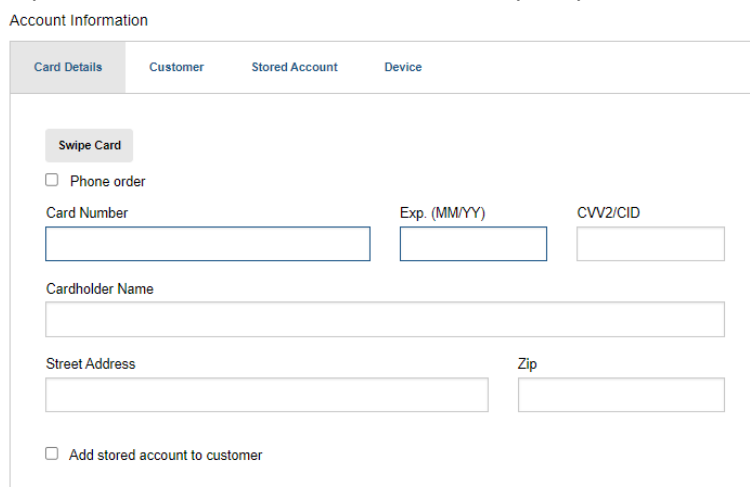
The screenshot shows a navigation bar with four items: 'Terminal', 'Reports', 'Company', and 'Customers'. The 'Terminal' item is highlighted with a blue background and a dropdown arrow. Below it, a dropdown menu is open, showing three options: 'Sale' (highlighted in light blue), 'Auth Only', and 'Card Verification'.

2. Enter the **Total Amount** of the sale you want to run. The **Tip amount** and **tax Amount** are for reporting purposes only on the VT. Select the Tax Exempt box if you do not wish to enter tax.



The screenshot shows the 'Sale Transaction' form. At the top, it says 'i3 verticals guide build' and 'Charge a customer card and capture immediately.' Below this is the 'Amount' section. On the left, a blue box contains the instruction: 'Please enter the full transaction amount, including tax and tip in the Total Amount field. The separate tax and tip fields are for reporting purposes.' On the right, there are three input fields: 'Total Amount', 'Tip Amount', and 'Tax Amount'. Below these fields is a checkbox labeled 'Tax Exempt'.

3. You can choose **Card Details**, **Customer**, **Stored Accounts**, or **Device** depending on how the card will be taken. The **Card Details** are used for keyed sales, and **Devices** are used to trigger a pin pad to insert or tap a card. The **Customer** and **Stored Account** tab pulls from their respective databases for the card numbers. The fields in *blue* are *required*, while the others are optional. It is recommended to enter the address and zip for the best rates and CVV for fraud prevention on keyed sales. The cardholder names are only for your records.



The screenshot shows the 'Account Information' form. At the top, there are four tabs: 'Card Details' (highlighted in blue), 'Customer', 'Stored Account', and 'Device'. Below the tabs is a 'Swipe Card' button. Underneath is a checkbox for 'Phone order'. The form contains several input fields: 'Card Number' (highlighted in blue), 'Exp. (MM/YY)' (highlighted in blue), 'CVV2/CID' (highlighted in blue), 'Cardholder Name', 'Street Address', and 'Zip'. At the bottom, there is a checkbox labeled 'Add stored account to customer'.

4. If you need to add the customer, click **Add stored account to customer**. This will allow you to add the card information to a new or existing customer.

☒ Add stored account to customer

Add New Customer

Add To Existing Customer

Customer name

Customer email

Customer phone

5. You can also fill in any of the additional **Transaction Details** shown below. You can request custom fields to be added by Tech support.

Transaction Details

Order Number

1706732252

PO#

Clerk ID

Station ID

Comments

Receipt Notes

☐ Level III Transaction

6. If you want to add line items manually, you can do so by pressing the **Level III Transaction**. This is for level three processing; this is also unnecessary if you have the pre-pop level three enabled.

☒ Level III Transaction

Destination ZIP code

Destination country code

Duty Amount

Freight/Shipping Amount

Discount Amount

Level III Line Items

Edit	Commodity Code	Item Descriptor	Product Code	Item Quantity	Unit of Measurement	Unit Price	Discount Amount	Discount Rate	Amount
No line items added yet									

Add Line Item

7. Once you have completed filling in your information, press the **Process** button to run your transaction. If you have a Move pin pad, you can select the option to print the receipt automatically.

☐ Print receipt after transaction completes

Process

- Once the sale is approved or declined, you can view the receipt by clicking the **View Receipt** button. All transactions are given a **TTID**, which is a **TranSafe Token ID**.

Transaction Result:
✓ APPROVED

Auth Number: 291305

AVS: STREET

CV: GOOD

Amount: \$0.01

[View receipt](#)

Customer copyMerchant copy

Your Receipt

i3 verticals guide build
1500 Medical center pkwy
Murfreesbor, Tennessee, 37129
770-947-6000
techsupport@i3verticals.com

Purchase	
Lane	1
VISA	M
Account	XXXXXXXXXXXX2555
Customer	A test
Time	01/31/24 14:24:47
Order Number	1706732252
TTID	403073488444038
Auth	291305
Batch	1

Subtotal \$0.01

Total \$0.01

APPROVED

Important - Retain This Copy For Your Records
Customer Copy

- Then, you will see the options to either **Email Receipt** or **Print Receipt**.

Email Receipt-

Email address

☒ Original ☐ Duplicate

[Send](#)

Email Receipt+

[Print Receipt](#)

Print Receipt+

[Print from browser](#)

Auth Only

- The **Auth only** transaction is run the same as the sale; however, this transaction will only place the funds on hold until you **Capture** the sale under the **Uncaptured Transactions** Report.

Card Verification

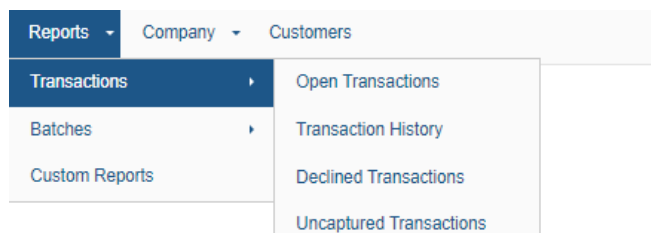
- The **Card Verification** Transaction is used to verify AVS information on a card.

Reports

The reports can be classified into three types: open, settled, and declined. The reports for transactions in an open batch are the **Open Transactions**, **Open Batches**, and **Uncaptured Transactions** reports. Then, the settled sales are seen in the **Settled batches** and **Transaction History** reports. Then there is the **Declined Transactions** report that lists any TranSafe or Host declines/errors.

Transactions

- **Open Transactions:** show transactions in the open batch
- **Transaction History:** shows transactions that have been settled.
- **Declined Transactions:** show the declined transactions.
- **Uncaptured Transaction:** show the auth-only sales, these can be captured.

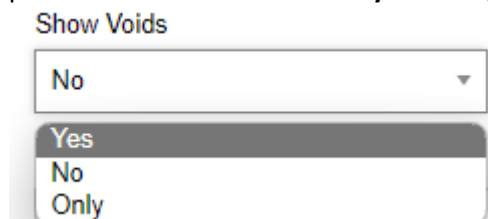


Advance options

When pulling reports up under **Transactions** you will have **Advanced options** that will allow you to search by different parameters: **Date range**, Batch, Route, **User**, **Order Number**, **PO#**, **TTID**, clerk ID, **Station ID**, or filter by **Card type**, **Transaction type**, or **transaction flag**.

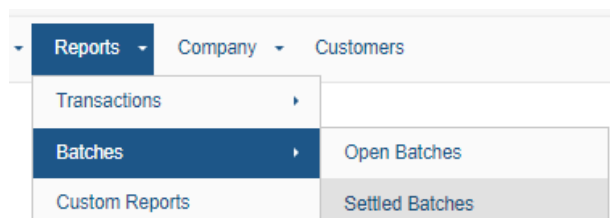
Voided sales

If you want to see voided sales you must come in **Advance options** and change the **Show Voids** parameter to either **Yes** or **Only**. The flag defaults to **No**



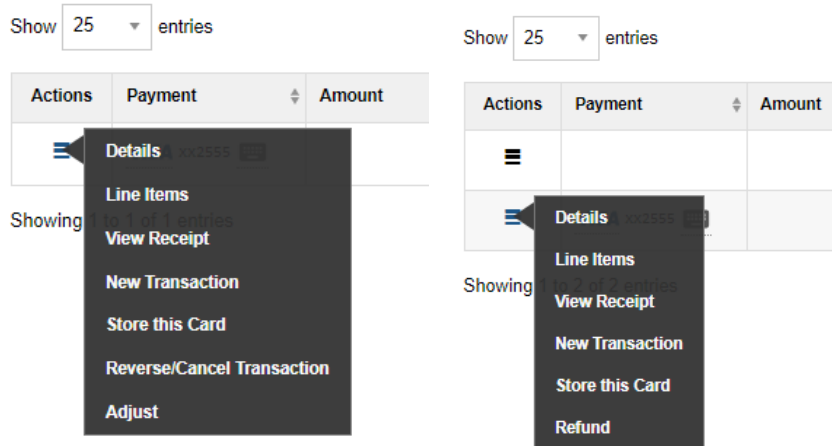
Batches

- **Open Batches:** show the current open batch
- **Settled Batches:** Show the past closed batches in a summary,



Actions menu

When looking at a sale or specific items in TranSafe, you will have three lines that will allow you to pull up an **Actions** menu. You will see different options depending on the item you are looking at. For example, when the sale is in an open batch, you can **Adjust** a sale and have the option to void the sale with the **reverse/cancel transaction** button. However, once the batch closes, that option turns to **Refund**. The **Details** will allow you to see details of the sale and **Line Items** the line items you added to the sale. **View Receipt** will allow you to view, email, or print the receipt. You can also run a sale using the same card info with the **New Transaction** button as well as save the card with **Store this Card**.



When looking at the Settled Batches, you can view the individual transactions by batch by selecting **View Transactions** in the menu. **Details** will only give you the details of that batch.

	Batch #	Date/Time	Route ID	Total Trans #	Total Trans \$	Total Return #	Total Return \$
		2/1/2024 00:00:00	0	1	0.01	0	0.00

Showing **Details** **View Transactions** **View Transactions by Cardtype**

Previous **1** Next

Custom reports

You can save any report as a custom report. Once you give it a name, you can select **Edit** to customize and show the information you need in the order you want it by changing the **Column Order**.

Visible Columns

<input type="checkbox"/> abaroute	<input type="checkbox"/> account	<input type="checkbox"/> accounting_id
<input type="checkbox"/> accounttype	<input checked="" type="checkbox"/> amount	<input type="checkbox"/> apikey_id
<input type="checkbox"/> auth_proc	<input type="checkbox"/> authamount	<input checked="" type="checkbox"/> authnum
<input checked="" type="checkbox"/> avs	<input type="checkbox"/> batch	<input type="checkbox"/> capture
<input type="checkbox"/> card	<input checked="" type="checkbox"/> cardholdername	<input type="checkbox"/> cardlevel
<input type="checkbox"/> cashbackamount	<input type="checkbox"/> checknum	<input type="checkbox"/> clerkid
<input type="checkbox"/> code	<input type="checkbox"/> comments	<input type="checkbox"/> customer_id
<input type="checkbox"/> custref	<input checked="" type="checkbox"/> cv	<input type="checkbox"/> descloc
<input type="checkbox"/> descmerch	<input type="checkbox"/> discountamount	<input type="checkbox"/> divisionnum
<input type="checkbox"/> dutyamount	<input type="checkbox"/> entrymode	<input type="checkbox"/> examount
<input type="checkbox"/> expdate	<input type="checkbox"/> fee	<input type="checkbox"/> freightamount
<input type="checkbox"/> item	<input type="checkbox"/> l3num	<input type="checkbox"/> last_modified_ts
<input type="checkbox"/> msoft_code	<input type="checkbox"/> order_id	<input type="checkbox"/> ordernum
<input type="checkbox"/> prinauthamount	<input type="checkbox"/> none_id	<input checked="" type="checkbox"/> naument

Column Order

1. payment
2. amount
3. tax
4. timestamp
5. cardholdername
6. avs
7. cv
8. authnum
9. ttid

Devices

This is where you add devices you will use through the VT. If using an API, you can add the device through the endpoint system and will not see the device within the TranSafe portal with no issues.

1. From your Transafe Dashboard screen, hover over **Company** at the top of the screen and select **Devices**.
2. Once you are in the Devices screen, you will need to select **Add Device**.



3. Once you are on the screen to add your device, you will need to select the **Device Type**(which, depending on what you're using, depends on the option you're supposed to choose. i.e., Move5000 needs a device type of UPP, or IPP320 needs a device type of RBA.)

Add a Device

I3Verticals Demo

Device Type

- Select a device type -


Serial Number

Name (just for reference, not related to device configuration)

☐ Auto-print receipt after transaction (if device is capable of printing)

Submit

4. Next, you need to add the device's serial number.
5. To add the serial number, please press 0000 on your device, and down where it says Injected Serial Number, please add that to the **Serial Number** box in Transafe.
6. Next, you will need to add a **Name** for the device. The names are only to help you identify the device.
7. Then **Submit**.
8. Once you have submitted it, you should see the device added successfully.
9. Lastly, select the **Action menu** to the left of the device you just added and choose **Device Load**. This will complete the process of adding a device.

Actions	Name	Type	Serial Number	Date Added
	ico ISC/IPP/UN/ISMP (RBA)		2219039PT011105	Wed 3/17/21 15:30:34
Showing	<div>Device Information</div> <div>Device Load</div> <div>Delete</div>			

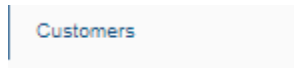
10. You can now run a transaction on the device.

Customer Database

The Customer Databases allow you to hold multiple Stored Accounts or Addresses of a customer. It will also allow you to add an email address to the customer.

Customer

1. To add a customer, click **Customers**.



2. Fill in all the needed data for your customer; the only requirement is the "Display Name."

Add a Customer
i3Verticals Tech Support Test Omaha

Customer Name		Contact Information	
Display name Yogi Bear		Mobile phone number 999-999-1234	Work phone number
Title/Prefix (Mr., Mrs., Dr., etc.)		Home phone number	Fax number
First name Yogi	Middle name	Email address techsupport@i3verticals.com	
Last name Bear	Suffix (Jr., Sr., III, etc.)		

Company Details	Additional Details
Company name The Bear necessities	Accounting ID
Website	Notes
Business ID (FEIN)	<input type="checkbox"/> Automatically email receipt to customer for recurring/installment transactions <input type="checkbox"/> Customer is tax-exempt

Submit

3. Once you select **Submit**, you can add "Stored Accounts" or "Addresses."

Success! Customer added.

October 9, 2023 13:53:04 October 9, 2023 13:53:04

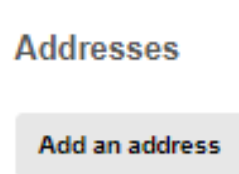
Stored Accounts	Addresses
Add a stored account	Add an address

CLICK TO MAKE CHANGES

Customer Name Contact Information

Addresses

1. To add an address, select **Add an Address**.



2. The “Display Name” is only to reference the address; fill in the required fields in blue. Select **Submit**.

Add a Customer Address

Yogi Bear (i3Verticals Tech Support Test Omaha)

Display name (for reference purposes)

Home

Address line 1

123 Bear Lane

Address line 2

City

Murfreesboro

State

TN

Zip/Postal code

37129

Country

United States of America ▼

Delivery Notes

☒ Default billing address

☐ Default shipping address

Submit

3. Once completed, it will look like the one below.

Addresses

Home (Murfreesboro, TN)

Add an address

Stored Accounts

1. To add a stored account, select “**Add a stored account.**” You can do this from a customer or by going to **Company** and **Stored accounts**

Stored Accounts

Add a stored account

2. Then, you must fill in the Payment information; only the “Card Number” and Exp (MM/YY) are required fields.

Payment Information

Card Details

Card Number

VISA

4111 1111 1111 1111

Exp. (MM/YY)

12 / 28

Cardholder Name

Yogi Bear

Street Address

123

Zip

12345

Storage/Billing Details

☒ Enabled

Reference # (must be a numeric value, if specified)

Description

☐ Create a scheduled payment for this account

Submit

3. To create a Recurring or Installment payment, select the check box. “**Create a scheduled payment for this account**”. Installments will end after so many payments while recurring payments will end on a date or go indefinitely if no date is selected. Select **Submit** when done.

Scheduled Payment Details

Payment Type

Recurring

I need an account to be billed periodically.

Amount

Charged per billing

Frequency

Monthly

Start Date

10/09/2023

End Date

Leave blank for indefinite

Transaction Fields

tracking_number

po_number

zip_code

street

- or -

Scheduled Payment Details

Payment Type

Installment

I need to bill an account several times (up to a set dollar amount).

Amount

Total amount

Frequency

Monthly

Start Date

10/09/2023

Installments (max 99)

Transaction Fields

tracking_number

po_number

zip_code

street

4. Once complete, this will take you to the stored account section and show any other stored accounts in the system.

Success! Stored account added.

Profile Tokens

Add a Stored Account

i3Verticals Tech Support Test Omaha (530 476 746)

Advanced Options

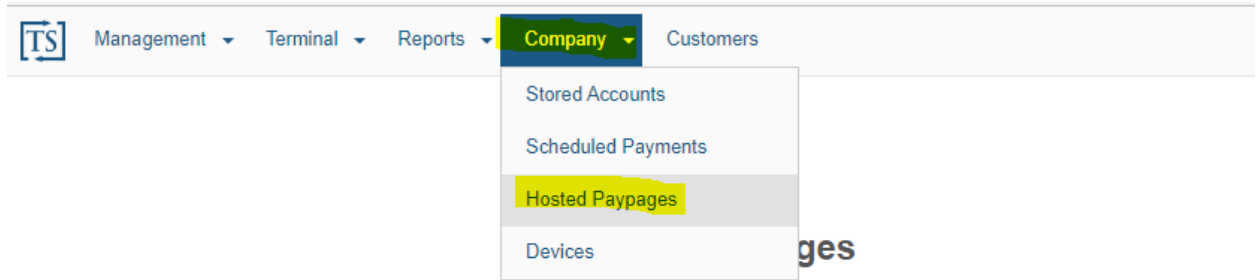
Show 25 entries

Filter:

Actions	Token	Status	Account	Exp. Date	Name	Type	Reference #	Description
	1723281704193162578	ENABLED	VISA xx1111	12/28	Yogi Bear	NORMAL		

Hosted PayPages

1. To create a hosted pay page, go to **Company** and then **Hosted Paypages**.



The hosted payment page is a page provided by TranSafe associated with a profile which can take blind payments. Anyone with the link (which is not in any way specific to the customer) can make a payment.

2. Select the button “Add Paypage” to start the creation.

Hosted Paypages

i3Verticals Tech Support Test Tsys

Add a Paypage

The hosted payment page is a page provided by TranSafe associated with a profile which can take blind payments. Anyone with the link (which is not in any way specific to the customer) can make a payment.

Typically, when using the hosted payment page, customers will be asked to enter a form of identification for the payment such as an invoice number, customer number, patient number, etc. Since this is free form and provided by the customer with no validation there is a high likelihood of incorrect information being entered. Regular reconciliation with manual matching of payments to customers is necessary.

This is not a recommended method to request payments from customers. While this method of payment is popular with many merchants due to its ease of deployment, it should be avoided if possible. This payment method is ideally suited for one off semi-anonymous donations.

More information

Show 25 entries

Filter:

Actions	ID	Description	Transaction Type	Max Transaction Amount	Fee Type	Fee	Last Payment
No data available in table							

Showing 0 to 0 of 0 entries

Previous Next

3. From here, you will want to give your Hosted page a name in the “Description,” then select if you will allow **Different Payment amounts** or **Enforce fixed Payment amount**. You must also enter a **Max Payment amount**, **Max Transaction Count Per Day**, and **Max Total Amounts Per Day**.

Add a Hosted Paypage

i3Verticals Tech Support Test Tsys

Description

Test Link

Amounts

☒ Allow different payment amounts

☐ Enforce fixed payment amount

Max Payment Amount

500.00

Max Transaction Count Per Day

99

Max Total Amount Per Day

50000.00

Fields

Fields Shown

Select one or more options

Editable Fields

Select one or more options

Required Fields

Select one or more options

Returned Fields

Select one or more options

Redirect URL must be set for returned fields to function.

4. The Hosted Paypage default required fields are the *Amount, Card Number, Exp, CV, Card Holder Name, Street Address, Postal Code, and Email*. For other fields you want displayed on the page, select them under “Fields Shown.” If you wish to make those fields editable and/or required, select them under the “Editable Fields” or “Required Fields” sections. This includes the amount field if you want it to be an editable field, but it is already required by default.

Add a Hosted Paypage

i3Verticals Tech Support Test Tsys

Description

Test

Amounts

☒ Allow different payment amounts

☐ Enforce fixed payment amount

Max Payment Amount

500.00

Max Transaction Count Per Day

99

Max Total Amount Per Day

50000.00

Fields

Fields Shown

comments ✕

Select one or more options

Editable Fields

comments ✕ amount ✕

Select one or more options

Required Fields

Select one or more options

Returned Fields

Select one or more options

Redirect URL must be set for returned fields to function.

The “Returned Fields” send information back to the URL provided in “Redirect URL” (Devs only)

5. Then select the “Transaction type,” either “Sale” or “Preauth,” depending on what you want the transaction to run as, then select the “CardTypes” you want taken. The “Privacy Policy URL” and “Terms of Use/Service URL” are from the business directly. If a fee is wanted on the link, you will need to select the “Fee Type” of either “Percentage” or “Fixed Amount” and then enter a “Fee Amount” and a “Fee Name.” Then press **Submit**.

Payment

Transaction type
Sale

Cardtypes

☒ Visa ☒ MasterCard ☒ American Express ☐ Discover
☐ Diners Club ☐ Japanese Credit Bureau

URLs

Terms of Use/Service URL
www.google.com

Privacy Policy URL
www.google.com

Redirect URL

Fee

Fee Type
None

Submit

6. Now, the Hosted Paypage is created. Select the **Actions** menu if on the main “Hosted Paypages” screen or if on the “Edit Hosted Paypage” screen, press **Actions**, and then select “Generate Button/link.”

Edit Hosted Paypage

Test

CLICK TO MAKE CHANGES

Description
Test

Actions

Generate Button/Link

Delete this Paypage

or

Hosted Paypages

Add a Paypage

The hosted payment page is a page provided by TranSafe associated with a profile which can take blind payments. Anyone with the link (which is not in any way specific to the customer) can make a payment.

Typically, when using the hosted payment page, customers will be asked to enter a form of identification for the payment such as an invoice number, customer number, patient number, etc. Since this is free form and provided by the customer with no validation there is a high likelihood of incorrect information being entered. Regular reconciliation with manual matching of payments to customers is necessary.

This is not a recommended method to request payments from customers. While this method of payment is popular with many merchants due to its ease of deployment, it should be avoided if possible. This payment method is ideally suited for one off semi-anonymous donations.

More information

Show 25 entries Filter:

Actions	ID	Description	Transaction Type	Max Transaction Amount	Fee Type	Fee	Last Payment
	23022746838114724	Test	SALE	500.00			Mon 1/23/23 14:44:43

7. You will have the option to edit and update the look of the button or place pre-populated data in the fields of the Hosted Paypage, along with deciding if the link will launch in the current browser tab or a new tab.

Generate Paypage Button

[Edit Paypage](#)

Test

Appearance

Button text

Font size (pixels)

Padding (pixels)

Border width (pixels)

☐ **Bold** text

☐ *Italic* text

☐ Underlined text

☒ Square corners

☐ Rounded corners


☐ Circular ends

Colors


☒ Select colors

☐ Enter hex codes manually (advanced)

Background color



Text color



Behavior

☒ Open paypage in current browser tab

☐ Open paypage in new browser tab

Pre-populated Fields

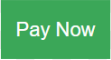
☐ Amount

☐ Comments

8. Once you have completed your edits to the Button and link, select **Update** to save your changes, and then you have the link or the button code at the bottom of the screen ready to use.

[Update](#)

Preview



Button Code

Copy and paste the code below to add this button to your web page.

```
<a href="https://orders.transafe.com/hosted_paypage/23022746838114724" style="font-size:22px;padding:16px;background-color:#32a852;color:#ffffff;border:none;border-radius:0;font-weight:normal;font-style:normal;text-decoration:none;">Pay Now</a>
```

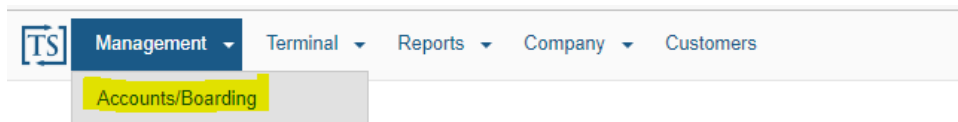
Link URL

https://orders.transafe.com/hosted_paypage/23022746838114724

[Preview](#)

Users

1. Go to **Management** in the upper left-hand corner and select **Accounts/Boarding**. This can only be accessed if you have permissions to User or . Please speak to the admin user of the account to add this permission for you.



Accounts/Boarding

2. Depending on your access to multiple accounts, you may see a list of **Users**, **Merchants**, or **Merchant Subgroups**.

	I3VERTICALS LLC - Equipment & Customer Care Billing	
	MERCHANT	
	USERS	
	SUBGROUPS	
	Bill and Pay account	
	MERCHANT SUBGROUP	
	Equipment & Customer Care Billing	
	MERCHANT SUBGROUP	
	I3 Verticals Relief Account	
	MERCHANT SUBGROUP	
	i3Verticals EOM	
	MERCHANT SUBGROUP	

3. Select the Menu next to **Merchant** or **Merchant Subgroup** to access the option **Add User**. Not all accounts have subgroups; when you place users under a subgroup, they can only access the Profiles connected to that subgroup. If you create the User under the Merchant, they will have access to all the Subgroups and Profiles under that Merchant.

	I3VERTICALS LLC - Equipment & Customer Care Billing
	MERCHANT
	USERS
	SUBGROUPS
	Bill and Pay account
	MERCHANT SUBGROUP
	Equipment & Customer Care Billing
	MERCHANT SUBGROUP
	I3 Verticals Relief Account
	MERCHANT SUBGROUP
	i3Verticals EOM
	MERCHANT SUBGROUP
	<div><div>Details</div><div><div>View Subgroups</div><div>View Profiles</div><div>Transaction Statistics</div><div>View Users</div><div>User Permissions Report</div><div>Add User</div><div>Previous Invoices</div><div>Previous Subgroup Invoices</div></div></div>

4. Once you are at the add user screen, the required fields are the Username, contact name, and email address. You will have some user options to the side, and here are the descriptions.
- a. **Require Multi-Factor Authentication:** turn on Multi-Factor Authentication on the user.
 - b. **Unattended user**(Intended for software integration): This is designed for software integrations or possibly mobile apps; the passwords won't need to reset; however, the user cannot log in to the VT
 - c. **User cannot see any other users or any transactions performed by other users:** User can only see their sales.
 - d. **Allow user to perform refunds not linked to any prior transaction:** Gives access to Blind refunds (refunds without a corresponding sale)
 - e. **Allow user to change the password of other users at the same group level (with equal or lesser permissions):** Allows user to change passwords of users with the same permissions and lower.
 - f. **Allow user to create group-level API keys:** Allows the user to create API keys for the group.

Add User

I3VERTICALS LLC - Equipment & Customer Care Billing

Credentials

Username

A password will be auto-generated and emailed to the user.

Contact Information

Contact name

Email

Mobile Phone

User Options

- ☐ Require multi-factor authentication
- ☐ Unattended user (intended for software integrations)
- ☐ User cannot see any other users or any transactions performed by other users
- ☐ Allow user to perform refunds not linked to any prior transaction
- ☐ Allow user to change the password of other users at the same group level (with equal or lesser permissions)
- ☐ Allow user to create group-level API keys

5. Next, you will give the user access to what options you want them to have within the VT. The options highlighted in green are the defaults that pop up when you initially create a user. You can give the user access to the described options by checking the boxes.

Portal Access

Select all Portal access roles you would like this user to have.
Alternatively, you can check the "Customize Portal permissions" box to select a custom permission set for this user.

Transactions/Reporting

☐ **Manage Customers**
Create and edit customers for any accessible profile

☐ **Manage UniTerm Cloud Devices**
Set up and manage UniTerm Cloud payment devices

☒ **Run Transactions**
Run and settle financial transactions using any profile the user has access to

☒ **Modify Transactions**
Modify (cancel, edit, refund) transactions

☐ **Advanced Batch Management**
Perform advanced batch management tasks such as rescinding and clearing batches

☒ **View Reports**
View reports for transactions and batches

☒ **Use Tokens**
View existing stored account tokens and use them to run transactions

☒ **Add Tokens**
Add stored account tokens

☒ **Modify Tokens**
Modify/delete stored account tokens

☐ **Manage Scheduled Payments**
Add, edit, and delete scheduled recurring or installment payments

☐ **Manage products and orders**
Add/modify/delete product and order data, send invoice links, and generate hosted paypages

Users

☐ **Manage Users**
Create new users and edit existing users

☐ **Reset User MFA**
Reset multi-factor authentication for other users so that it needs to be regenerated

☐ **Disable/Enable Users**
Disable and enable existing users

☐ **Move Users**
Move existing users to different owning groups

☐ **Delete Users**
Delete existing users

6. *(Multiple profiles only)* If creating a **User** who needing to see multiple **Profiles**, they must have **View Profile Information** permissions to switch between the profiles. Giving them access to **Statistics** will allow them to see the different profile statistics. The user will need to be built under the **Merchant** or **Merchant Subgroup**, depending on what profiles they need access to. If you attach a **Default profile** to that user they will immediately log in viewing that profile and must choose **Management** to see the other accounts.
7. If you are a merchant billed by TranSafe directly for gateway fees, you will have access to see your Transafe invoices, so you will have options to **View Invoices**.
8. There is a **Customize Portal Permission** view that allows you to see the individual options that make up these groups to customize the users; however, that is recommended for developers or users familiar with the API as some options require selecting other options to function correctly. Once you have chosen your options, select **Submit**.

Profile Boarding

☐ **View Profile Information**
View existing profiles

☐ **Statistics**
View high-level profile usage statistics, along with basic profile information

☐ **Manage SkyLink**
Manage SkyLink product licenses

Billing

☐ **View Invoices**
Access previous invoices and upcoming invoice estimates

☐ Customize Portal permissions

Default Profile

If this user will be making profile-level administrative or transaction requests with one primary profile, you can select it here as the user's default profile. Any administrative or transaction requests that don't specify a profile ID will automatically use the selected default profile.

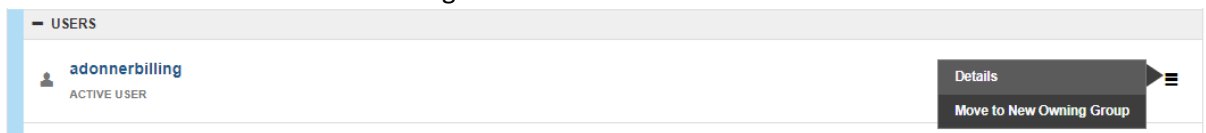
Select default profile

Submit

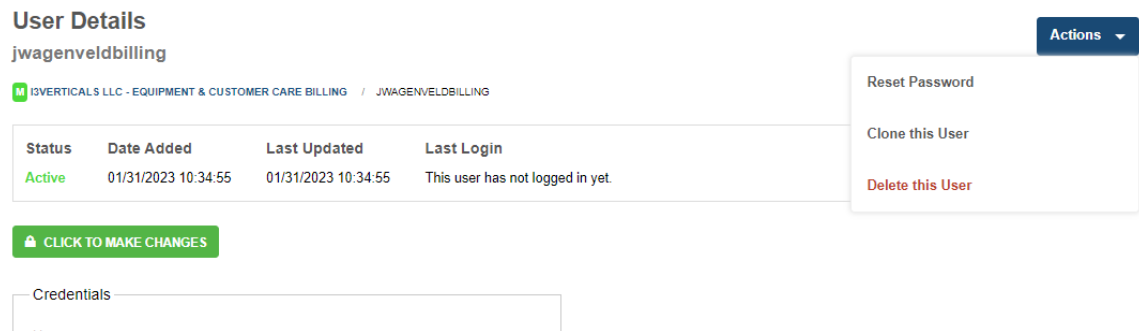
9. To edit a **User**, Select the plus next to **Users** to see the list of users.



10. Then select the **Action Menu** to the right of the **User** and choose **Details**.



11. You can change the user by clicking **Click to make changes**. Or, under **Actions**, you can **Reset Password**, **Clone this User**, or **delete the user**.



If you have issues, please contact us at 888-311-5203 or contact us at TranSafesupport@i3verticals.com