Citadele

Merchant's portal User Guide

portal.tapxphone.com

In the Merchant's portal, you can:
1. create cashiers who can use the Application under their own accounts;
2. unbind a specific payment terminal from one mobile device in order to bind it to another device;
3. view all successfully completed or unsuccessful transactions performed in the Application

Log in to Merchant's portal

To log in to the portal, you must enter:
• Login
• Password

Please use your email address to log in, the e-mail address specified in the Application for the Payment Card Service Agreement and the Card Service Device (POS Terminal) Lease Agreement.

The initial login password is sent via email, by e-mail specified in the Application for the Payment Card Service Agreement and the Card Service Facility (POS Terminal) Lease Agreement.

If you failed to enter the correct password more than 3 times the account is blocked. In such a situation, you can use the Password recovery function.

Cashiers Management

To create a cashier, go to the menu item Devices management-> Cashiers.
1. Click Add Cashier.
2. Enter Username and additional information about a cashier you are creating.

Pay attention to the case of characters in the Login you enter, for the password for that cashier on the first logging in to the"tapXphone" Application is by default equal to the Username.

Additional information should not contain personal data of a cashier. If you enter any personal data of a cashier as the additional information, then you are responsible for their integrity and safe use.
3. Set the cashier status to Active.

If the cashier's status is not set to Active, the cashier will not be able to log in to the Application (in this case, the Application will display a message with the number 205).

After a cashier account is ready, the cashier can start using the "tapXphone" Application on the device, which has passed the initialization process.

Unblocking a Cashier

If a cashier enters in the Application an incorrect password more than 5 times, the cashier's account gets blocked. To unlock that account, you should go to the menu Devices management -> Cashiers.

Find the blocked cashier.

Press "Set default password" in the user profile. The user's password will be reset to the original and will be the same as the user name.

To change your password, press the "Change password" button. In both cases, the password is changed and the user is activated.

Resetting the Password for the "tapXphone" Application

If it is necessary to reset the cashier's password before blocking the account, go to the menu Devices management -> Cashiers.
1. Find the cashier's account and open the cashier profile in the review mode.
2. Then click the Set default password button in the cashier profile.

The password value will be set to the Username (case sensitive). In order to set a specific password value use the Change Password button.

Device Management

To view the list of payment terminals registered by Citadele bank and their status, go to the menu Devices management - > Payment Terminals.

The Active status means that the payment terminal can be used for accepting payments. If the status of the payment terminal is different from Active, it cannot be used for accepting payments. The decision to deactivate a payment terminal is made by Citadele bank.

If in the Mobile device field of a payment terminal is indicated the ID of a mobile device, it means that this terminal is already linked and used on this device.

Mobile devices

To view the list of mobile devices initialized in the Application and their status, go to the menu Devices management - > Mobile devices list.

The "Activated" status means that the mobile device is bound to an active payment terminal and can accept payments.

The "Disabled" status means that the mobile device cannot accept payments, because the payment terminal bound to it is deactivated (blocked) by Citadele bank. You cannot accept payments with this device.

The status "Not configured" means that the mobile device is not bound to any payment terminal. You cannot accept payments on this device.

In this section, you can view the business day register. Business day register contains information about open and closed business days for each of the mobile devices. Also in this section, you can view consolidated information about transactions on a mobile device for a corresponding business day.

Also in this menu item, you can use the functionality for unbinding a payment terminal from a mobile device.

Payment Terminal unbinding

During the initialization of a device and/or activation of a payment terminal, you may encounter the message There are no available terminals for the current mobile device.

You can get this message when all of the payment terminals generated by Citadele bank are already linked to your other mobile devices. One of the ways out of this situation may be disconnecting a payment terminal from one of the currently unused mobile devices.

To do this, go to the menu Devices management - > Mobile devices list.
1. Open the profile of the required device to view it.
2. In the Payment Terminal field, click Unbind.

Before unbinding the payment terminal from the device, you must first close the business day on it. About closing the business day, read here: App "tapXphone" User Guide -> Why and How to close the Business Day.

Additionally, after unbinding the device from the Merchant, we recommend to clear the Application old data, and go through the initialization process over again. To do this:
1. Go to the device settings, to the Applications section.
2. Find the tapXphone application.
3. Open the "Storage" section (or something similar to that title).
4. Click Clear Cache and Clear Data.

Transactions Log

To view the list of all transactions made via all mobile devices and by all cashiers, go to the menu Devices management - > Transaction Log .

You can filter the list of transactions by your own criteria and upload the received data into PDF or CSV.

In this menu, you can view and print out the receipt of any specific transaction.