MX™ Storefront

Training Manual

Partner Portal

Version: 2.0

June 2015

Introduction

The purpose of this document is to provide MX™ Storefront clients with a guide for their MX™ Storefront Management Console, also referred to as the **MX™ Storefront Partner Portal**. The major functionality included in this portal is summarized below:

- Create new MX™ Storefront accounts;
- Modify existing MX™ Storefront accounts;
- Change the account activity state of your MX™ Storefront accounts; and
- Change the billing status of your MX™ Storefront accounts.

The rest of this guide will be provided a functional overview, aided by annotated screenshots, of the major features of this component of the MX™ Storefront product.

Logging into the MX™ Storefront Partner Portal

You should have received the following set of information for your MX™ Storefront Partner Portal:

- MX™ Storefront Partner Portal URL;
- MX™ Storefront Partner Portal username (Note: this is the e-mail address you submitted upon your account setup); and
- MX™ Storefront Partner Portal password.

If you no longer have this material in your possession, please contact MX™ Storefront customer service to receive another copy of this information:

Contact number: (844) 225-2674
Support link: http://prioritypaymentsystems.com
Email: rmteam@pps.io

When you navigate to your Partner Portal URL, you will see the following screen:

Manage Your MXStorefront Program Today!

Welcome to the The MX Storefront program management page. By logging in, you can add merchants to the platform, receive notifications, manage merchant records, and view reporting on your program portfolio. You received your username and password in your welcome e-mail from the MX Storefront team. If you forgot your username or password, please use the links in the box to the right to retrieve them.

We thank you for being a valued customer of Priority Payment System's MXStorefront product. If you have any questions, concerns, or suggestions, please call the number or submit a message to us through the links provided below:

Phone Number: (844) 225-2674
Support: rmteam@pps.io

Partner Access
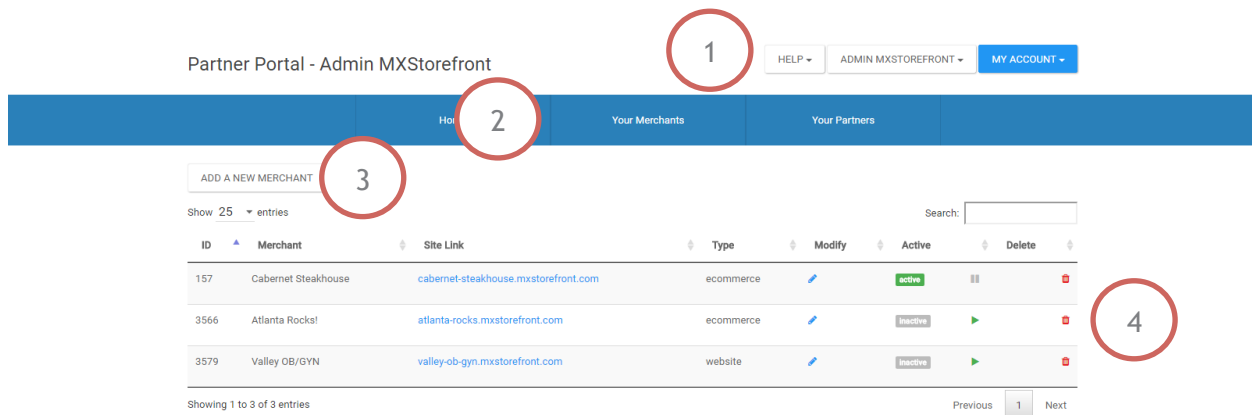
Username

Password

CONNECT NOW

Lost password?

Please see the following notes on the annotated features of this page:

1: This section displays pertinent product information and contact information for the customer service team.

2: This box is the login prompt for the Partner Portal. See directions above on how to log into the MX™ Storefront Partner Portal. If the user forgets their password, the user can click the "Lost Password?" link and submit their email address to the system. The user will receive an email with their new password immediately after submitting this request.

MX™ Storefront Partner Portal: Homepage

Once logged into the MX™ Storefront Partner Portal homepage, the user will see the following screen:

Please see the following notes on the annotated features of this page:

1: This is the top menu navigation for the Partner Portal. The following options are available:

- HELP → FAQ: This link opens a PDF of the Partner Portal FAQs.
- HELP → Help Manual: This link opens a PDF of the Partner Portal Training Guide (i.e. this document).
- Admin MX™ Storefront (office view dropdown) → This dropdown enables the user to choose which MX™ Storefront office is being viewed within the Partner Portal. Note: An office is a grouping of partner users who can view each others' MX™ Storefront records and accessing each others' Merchant Portals.
- MY ACCOUNT → Edit Account: This page enables the user to edit their account details, including changing their password or creating API keys for their user.
- MY ACCOUNT → Logout: This link logs the user out of the Partner Portal.

2: This is the menu navigation for the Partner Portal. The following options are available:

- Home → This link returns you to the Partner Portal homepage.
- Your Merchants → Add a New Merchant: This page enables the user to create a new MX™ Storefront account for a new merchant via the "Create merchant" page.
- Your Merchants → Manage Your Merchants: This page enables the user to manage MX™ Storefront accounts for existing merchants within the system via the "Update merchant" page.

3: This link is a shortcut to the "Create merchant" page.

4: This datagrid contains the following fields and accompanying functionality:

- ID: Merchant's internal MX™ Storefront ID.
- Merchant: Merchant's name in the MX™ Storefront system.

- Site Link (link): Merchant's MX™ Storefront website; if clicked, the user will be directed to a merchant's website in a new window.
- Type: Merchant's MX™ Storefront website type (either website or ecommerce).
- Modify (link): Link to the "Update Merchant" page for the merchant within the Partner Portal.
- Active: Merchant's MX™ Storefront activity state (either active or inactive). Additionally, a "play" button will change the activity state from inactive to active, and a "pause" button will change the activity state from active to inactive.
- Delete: An action to delete the merchant's account from the MX™ Storefront system.

MX™ Storefront Partner Portal: Create merchant page

By clicking on the "Your Merchants" option on the MX™ Storefront Partner Portal homepage and selecting the "Add a New Merchant" option, the user will be navigated to the following screen (see next page):

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Partner Portal - Admin MXStorefront

HELP ▾   ADMIN MXSTOREFRONT ▾   MY ACCOUNT ▾

Home	Your Merchants

Create merchant

(1)

Custom Domain	http://www.
Business Type	Accounting ▾
	This will prefill the website content accordingly
Website Type *	E-commerce ▾
Template	SELECT A TEMPLATE
Website Price	
Legal Business Name *	
Business Trading Name *	
Business Address *	

(2)

Business Address 2	
Business City *	
Business State	
Business ZIP *	
Business Country *	United States ▾
Business Phone *	
Business Fax	
Business Email *	
Business Logo (JPG/PNG)	Choose File No file chosen
Currency	USD ($) ▾
Google Key	AIzaSyD5GlhAyjddV7TqukohrpX6RoKziQ7lV7M

(3)

Yelp ID	⅄
	www.yelp.com/biz/**business-name**
Facebook ID	f
	www.facebook.com/**business-name**
Twitter ID	🐦
	twitter.com/**business-name**
Google Plus ID	g+
Language *	American English ▾
Cards Accepted	visa;mastercard
	Separate by ; (visa, mastercard, paypal, discover, amex, maestro)
Status *	Billable ▾
PayPal Email	₱

(4)

Payment Gateway	Priority ▾
PPS Gateway ID	
PPS oAuth Key	
PPS oAuth Secret	
Customer Merchant ID	
EIN	

(5)

☑ Active

☐ Do not send email to merchant with password

SAVE

Please see the following notes on the annotated features of this page:

1: These fields are the basic MX™ Storefront product data fields. They are detailed below:

- Custom Domain: This field is used to submit a custom domain for the merchant's website. If the merchant wants to integrate a custom domain with its MX™ Storefront website, the merchant should follow the directions below:

  To set up a custom domain for a merchant, there are two processes that need to take place:

  Step 1: Submitting Domain Information to MX™ Storefront

  1) Log into Partner Portal.
  2) When creating merchant, insert domain name into "Custom Domain" field on "Add a merchant" screen. Note: do not submit "http://" or "www" in this field - just insert the domain itself.
  3) Create the merchant.
  4) From the "Manage merchants" screen, click on the "Modify" pencil icon for the merchant.
  5) You will see a button on the right-hand side that says "Get Domain Values." Click this button.
  6) Copy 4 domain values shown.

  Step 2: Submitting MX™ Storefront Information to Domain Provider

  1) Log into domain management system account.
  2) Identify the necessary steps to change the "nameservers" for the domain.
  3) Delete the current default nameservers provided by the domain management system
  4) Paste the values extracted from the MX™ Storefront system into the "nameserver" fields in the domain management system.
  5) Save your account settings.

  Note: this change will take up to 48 hours to propagate and take full effect. For more information on specific domain providers, please see the "MX™ Storefront Domain Guide."

  Finally, if the "Custom Domain" field is left blank, the system will automatically generate an "http://MX™ Storefront.com"-branded domain for the merchant, which is populated on the next screen.

- Business Type: This field is used to submit the business type for the merchant. By selecting a pre-defined business type, the MX™ Storefront system assigns text, images, widgets, and layouts pre-configured for the business type. This enables the merchant's website to be automatically and instantaneously built with pre-defined content and ready for the merchant to use once the account is created.

- Website Type: This field enables the user to classify the MX™ Storefront website as a brochure website (i.e. no e-commerce capabilities), or an online storefront (i.e. e-commerce capabilities).

- Template: This button enables the user to choose the template that will be used for the MX™ Storefront website based on a sample thumbnail view.

- Website Price: This field is used to record the merchant-facing price for the product, which assists accounting during billing reconciliation.

2: These fields are the basic MX™ Storefront merchant data fields. They are detailed below:

- Legal Business Name: This field is used to provide the merchant's legal name to the MX™ Storefront system.

- Business Trading Name: This field is used to provide the merchant's business name (i.e. trade name / DBA) to the MX™ Storefront system.

- Business Address: This field is used to provide the merchant's street address to the MX™ Storefront system.

- Business Address 2: This field is used to provide the merchant's street address 2 to the MX™ Storefront system.

- Business City: This field is used to provide the merchant's city to the MX™ Storefront system.

- Business County: This field is used to provide the merchant's county to the MX™ Storefront system.

- Business Postal Code: This field is used to provide the merchant's postal code to the MX™ Storefront system.

- Business Country: This field is used to provide the merchant's country to the MX™ Storefront system.

- Business Phone: This field is used to provide the merchant's primary phone number to the MX™ Storefront system.

- Business Fax: This field is used to provide the merchant's fax number to the MX™ Storefront system.

- Business Email: This field is used to provide the merchant's primary email address to the MX™ Storefront system. Note: the merchant's email address is also the username for the MX™ Storefront Merchant Portal.

- Business Logo (JPG/PNG): This field is used to provide the merchant's logo to the MX™ Storefront system.

  Note: The "business" logo must always be in .jpg or .png format, and should be square for best results. Some templates may not accommodate all logo dimensions, but the partner user can edit and reupload the merchant logo through the "Update Merchant" page. Also, the

merchant can edit and reupload their logo through the Merchant Portal if desired. Note: the best resolution is a square image with the following dimensions: 116px x 116px.

▪ Currency: This field is used to set the merchant website's currency in the MX™ Storefront system.

3: These fields are the basic MX™ Storefront social data fields. They are detailed below:

▪ Google Key: This field is used to provide the merchant's Google Key to the MX™ Storefront system. This functionality is used to power merchant website widgets such as Google Maps and Google Streetview. Note: this field has a default value and should only be changed if the merchant has their own Google account to which they want to link their MX™ Storefront website.

▪ Yelp ID: This field is used to populate the Yelp rating and reviews on the merchant's MX™ Storefront website, populate a Yelp icon and link in the footer of the website, and populate the merchant's Yelp information in the Manage Your Brand → Monitor Reviews section of the Merchant Portal (see Merchant Portal Training Guide for more information). Note: this field is auto-populated if the Business Phone is populated and matches the phone information within Yelp's system.

▪ Facebook ID: This field is used to populate a Facebook icon and link in the footer of the merchant's MX™ Storefront website, and populate the merchant's Facebook information in the Manage Your Brand → Monitor Social Media section of the Merchant Portal (see Merchant Portal Training Guide for more information).

▪ Twitter ID: This field is used to populate a Twitter icon and link in the footer of the merchant's MX™ Storefront website, and populate the merchant's Twitter information in the Manage Your Brand → Monitor Social Media section of the Merchant Portal (see Merchant Portal Training Guide for more information).

▪ Google Plus ID: This field is used to populate a Google Plus icon and link in the footer of the merchant's MX™ Storefront website, and populate the merchant's Google Plus information in the Manage Your Brand → Monitor Social Media section of the Merchant Portal (see Merchant Portal Training Guide for more information).

4: These fields are the basic MX™ Storefront supplemental data fields. They are detailed below:

▪ Language: This field is used to set the merchant website's primary language name in the MX™ Storefront system.

▪ Cards Accepted: This field is used to submit the cards accepted by the merchant according to the configuration of their merchant account. This information is displayed on the merchant's website, as well as powers the card types in the ecommerce checkout workflow (if

applicable). Note: the cards must be submitted without spaces and separated by semi-colons for the system to properly recognize the card values.

▪ Status: This field is used to set the merchant's billing plan for their MX™ Storefront account.

The "Status" dropdown has three values: sample, free trial, and billable. These statuses have the following meanings:

• Sample – short-term free trial (i.e. 24 hours) for the purpose of initially demoing the product to a merchant;

• Free-trial – long-term free trial (i.e. 30 days) for the purpose of enabling the merchant to use the product for a specified period of time; and

• Billable – indicates that the merchant is a paying customer of the product. Note: any active merchants in "billable" status will be billed for their subscription to the product.

▪ PayPal Email: Currently, this field is not to be used. PayPal is not currently supported within the MX™ Storefront system.

▪ Payment Gateway: This field is used to set the merchant website's payment gateway product in the MX™ Storefront system.

▪ PPS Gateway ID: This field is used to provide the merchant's ID for their PPS MX Gateway account. Note: this field is mandatory to properly submit transactions from the merchant's MX™ Storefront website to the merchant's MX Gateway account.

▪ PPS oAuth Key: This field is used to provide the merchant's oAuth Key for their PPS MX Gateway account. Note: this field is mandatory to properly submit transactions from the merchant's MX™ Storefront website to the merchant's MX Gateway account.

▪ PPS oAuth Secret: This field is used to provide the merchant's oAuth Secret for their PPS MX Gateway account. Note: this field is mandatory to properly submit transactions from the merchant's MX™ Storefront website to the merchant's MX Gateway account.

▪ Customer Merchant ID: This field is used to set the merchant's Merchant ID (MID) in the MX™ Storefront system. This field is used to reconcile MX™ Storefront system accounts with internal merchant payment processing accounts.

▪ EIN: This field is used to set the merchant's EIN number in the MX™ Storefront system. This field is displayed on the customer's invoice when a successful ecommerce order is submitted through the merchant's MX™ Storefront website.

5: These fields are the basic MX™ Storefront checkbox data fields. They are detailed below:

- Active: This field is used to set the merchant's activity state for their MX™ Storefront account. When unchecked, this account will be deactivated and the merchant's website will no longer resolve when accessed via an Internet browser.

- Do not send email to merchant with password: This field is used to determine whether to send the merchant an initial welcome email upon creating their MX™ Storefront account. Note: this box should be checked if the merchant is not going to immediately receive access to their MX™ Storefront website.

MX™ Storefront Partner Portal: Update merchant page

By clicking on a merchant on your MX™ Storefront Partner Portal homepage datagrid, you will be navigated to the "Manage your merchant" page, seen below:

STOREFRONT
Move Your Brand Online™

Partner Portal - Admin MXStorefront

HELP ▾ ADMIN MXSTOREFRONT ▾ MY ACCOUNT ▾

| Home | Your Merchants |

Update merchant

Take Merchant Actions

✉ SEND WELCOME EMAIL

☰ GET DOMAIN VALUES

(1)

(2)

Custom Domain	http://www.	valley-ob-gyn.mxstorefront.com
Default Domain *	http://	valley-ob-gyn	.mxstorefront.com
Website Type *	Website	▾
Website Price	0.00	
Legal Business Name *	Valley OB/GYN	
Business Trading Name *	Valley OB/GYN	
Business Address *	7323 East Glendale	
Business Address 2		
Business City *	Phoenix	
Business State	AZ	
Business ZIP *	85308	
Business Country *	United States	▾
Business Phone *	6026256896	
Business Fax		
Business Email *	info@valleyobgyn.com	
Currency	USD ($)	▾
Google Key	AIzaSyD5GlhAyjddV7TqukohrpX6RoKziQ7lV7M	
Yelp ID	✦	

www.yelp.com/biz/**business-name**

| Facebook ID | f | |

www.facebook.com/**business-name**

| Twitter ID | 🐦 | |

twitter.com/**business-name**

Google Plus ID	g+	
Language *	American English	▾
Cards Accepted	visa;mastercard;discover;amex	

Separate by ; (visa, mastercard, paypal, discover, amex, maestro)

Status *	Sample	▾
PayPal Email	P	
Payment Gateway	Priority	▾
PPS Gateway ID		
PPS oAuth Key		
PPS oAuth Secret		
Customer Merchant ID		
EIN		

☐ Active

SAVE

Please note: the "Update merchant" field has many of the same fields as the "Create merchant" page. For any field not described below, please refer to its description in the "Create merchant" page summary above.

Please see the following notes on the annotated features of this page:

1: Default Domain: This field displays the default "http://MX™ Storefront.com" domain for the merchant's website. This value was created when the MX™ Storefront website was created for the merchant.

2: The "Take Merchant Actions" box contains functions that can be applied to the merchant's MX™ Storefront account. They are detailed below:

- SEND WELCOME EMAIL: This button resends the merchant the initial welcome email for their MX™ Storefront account. Note: if this button is clicked, the merchant's password for their Merchant Portal is automatically reset and the new password is sent in the welcome email.

- GET DOMAIN VALUES: This button is used to retrieve the nameserver values from the MX™ Storefront system that will enable the user to set up a custom domain for the merchant. Please refer to the "Custom Domain" instructions in the "Create merchant" page summary above for more information.