

ROAM

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ROAMsupport User Guide

Version 5.0.5

Document Revision 1.0.0

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Table of Contents

Introduction	4
Accessing the ROAMsupport Portal	6
Using the Clients Module	9
Using the Merchants Module	20
Using the Roles Module	25
Using the Users Module	29

Introduction

ROAMsupport is a web-based portal for user management and first-level merchant support. It allows users to configure and change information for an account boarded in ROAM's system. It also allows support functionality including the ability to change passwords, resend activation emails, view merchant information, transaction history, and modifications for all merchant, receipt and payment information.

Module Definitions

Module Name	Definition
Clients	Allows you to create or edit a client.
Profiles	Allows you to create a new profile, and view or edit an existing profile.
Merchants	Allows you to create a new merchant, create a sub-merchant, edit an existing merchant, and configure transaction, Reader, and receipt information for existing merchants.
Roles	Allows you to view standard roles, create new roles, and edit or delete existing roles.
Users	Allows you to create a new user, edit an existing user, and search for a user.

Workflow

1. Create a Client: Establishes the core settings that will be the basis of creating profiles and merchants. The client values will transfer throughout the portal.
2. Create a Profile: Builds a configuration of transaction and merchant settings, platform and reader information that will be inherited by a merchant when assigned a given profile. Disabling or enabling a feature at this level will dictate whether merchant profiles created have or do not have these features. Each option has a cascading effect to the next level of profile and merchant management.
3. Create a Merchant: Builds upon the base client configuration to create new merchants. Merchants inherit profile information.
4. Create Roles: Builds a configuration of permissions that will be assigned to each user.
5. Create Users: Users are assigned a client and role, thereby inheriting the associated configuration settings.

Accessing the ROAMsupport Portal

Supported Browsers

The following web browsers are supported for use with ROAMsupport:

- Google Chrome
- Mozilla Firefox 3.6+
- Microsoft Internet Explorer 9 and above

ROAM recommends Google Chrome or the latest release of Firefox.

Logging into ROAMsupport

To log into ROAMsupport:

6. Enter your User Name.
7. Enter your Password.
8. Click Login.

NOTE: After your initial login you should change your password for maximum security.

Logging Out of ROAMsupport

To log out of ROAMsupport, click the logout icon in the upper right-hand corner of the screen.

Changing Your Password

For maximum security you should change your password after your initial login to the ROAMsupport portal.

To change your password:

9. Click the username link in the upper right-hand corner of the screen.
10. Click the Edit button.
11. Enter the new password.
12. Confirm the new password.
13. Click the Save button.

Resetting a Password

The Reset Password button sends an email to the user with a link to the password reset page. You can access this feature from Merchant Summary or User Information page. Additionally the user can generate a password reset email by clicking the Forgot Password link on the login page.

Resending the Welcome Email

The Resend Welcome Email button generates a new welcome email to the user. You can access this feature from the Merchant Summary page. The email will be sent to the personal email address listed in the file. In instances where a personal email address does not exist, the welcome email will be sent to the business email address, where the receipts are being sent.

NOTE: This will reset the user's password.

Using the Clients Module

The Client module allows you to create new clients, and edit existing client information.

Creating a New Client

To create a client:

14. Select the parent client from the Client Search field.
15. Click the Create Client button.
16. Enter the Details settings.

Field Name	Definition
Parent Client	The name of the parent client.
Copy From Client	When checked, copies address and configuration information from parent client.
Sub-Client Name	The full display name of the client for display across the ROAM system. This will be the identifying name of how the client will appear when searching or viewing client information.
Country	The country of the client being boarded.
Address 1	The address line 1 of the client business address.
Address 2	The address line 2 of the client business address.
City	The city of the client business address.
State	The state/province/region of the client business address.
Zip Code	The zip/postal code of the client business address.
Copy Roles From Parent Client	When checked copies the client roles associated with the parent client.

17. Enter the Administrator settings.

Field Name	Definition
First Name	The first name of the user who will be the initial administrator account created for the client.
Last Name	The last name of the user who will be the initial administrator account created for the client.
Username	The username name of the user who will be the initial administrator account created for the client.
Email Address	The email of the user who will be the initial administrator account created for the client.

Field Name	Definition
Role	The initial role that will be provided to the boarded client administrator.

18. Enter the Contact Details settings.

Field Name	Definition
Account Contact	The name of the person who can be contacted for any commercial/account information relating to the client.
Account Contact Email Address	The email address of the person who can be contacted for any commercial/account information relating to the client.
Account Phone Number	The phone number of the person who can be contacted for any commercial/account information relating to the client.
Support Contact	The name of the person who can be contacted for any client support information.
Support Contact Email Address	The email address of the person who can be contacted for any client support information.
Support Contact Phone Number	The phone number of the person who can be contacted for any client support information.

19. Click the Save & Next buttons.

20. On the Regional Settings tab select the Countries, Reader Type and Processor/Platforms.

21. Configure the Transaction Elements settings.

Field Name	Definition
Discount	Enables/Disables the discount setting for the ROAMpayX application and virtual terminal.
Tip	Enables/Disables the tip setting for the ROAMpayX application and virtual terminal.
Surcharge	Enables/Disables the surcharge setting for the ROAMpayX application and virtual terminal.
Tax	Enables/Disables the tax setting for the ROAMpayX application and virtual terminal.

22. Configure the Transaction Type settings.

Field Name	Definition
Offline	Enables/Disables the offline setting for the ROAMpayX application.
Manual Entry	Enables/Disables manual entry within ROAMpayX. • AVS - Address verification service for manual entry transactions. • CVV - Card Verification Value. Can only

Field Name	Definition
	be controlled as an option if 'Manual Entry' is enabled.
Virtual Terminal	Disabling the virtual terminal will block access to the application from within the myROAM portal.
Refund	Disabling the refund option will prevent a merchant from providing the refund facility to a customer, and disable the following options: • myROAM • Smart Refund
Void	Disabling the void option will prevent a merchant from providing a void button on ROAMpayX, the void facility to a customer, and disable the following options: • Void Last Transaction • Void Unsettled Transactions

23. Click the Save & Next button.

24. Configure the Merchant Setup settings.

Field Name	Definition
Reader Device Management	Enables/Disables the use of reader management by serial number across merchant accounts.
Merchant Can Change the DBA Name	Enables/Disables a merchant to adjust their DBA name.
Merchant Can Change the DBA Address	Enables/Disables a merchant to adjust their DBA address information.
Allow Sub Clients	Allows the client to create sub-clients.
Show Paper Receipt Information	Option to provide additional receipt page information in ROAMpayX that can be transcribed (copied out on paper) by a merchant and provided to a customer at the time of the transaction.
Collect Optional Information	Option to control the collection of optional customer information at the completion of the transaction.
Inventory Management	Controls a merchant's access to use local device inventory in the app.
ROAMpayX Timeout	A value to determine the timeout/lock value for the mobile application.
Receipt To Address	The email address to distribute all confirmation emails for masterline and subline boarding.
Merchant Address Collection	Option to control if the merchant address information is mandatory when creating a merchant account.
Merchant MCC/SIC Code Collection	An option to control if the merchant MCC and SIC code input fields are mandatory when creating a merchant account.
Merchant Tax ID Collection	An option to control if the merchant tax ID input field is mandatory when creating a merchant account.

25. Configure Receipt Information settings.

Field Name	Definition
Email from Address	For all messaging notifications sent from the ROAM system, this will be the FROM email address value. For example support@roamdata.com
Email from Name	For all messaging notifications sent from the ROAM system, this will be the FROM email name value.
Map Information	Selection of the source map image when providing a customer receipt.

26. Click the Save & Next button.

27. Once all settings have been configured click the Confirm tab to review the client's profile. If no changes need to be made, click the Create button. To change a setting, click the corresponding tab on the left-hand side of the screen.

Once you've created a client you can email a PDF copy of their settings to another user by using the Share button, or generate a PDF to print by using the Print Summary button.

If you stop creating a client record prior to clicking the Create button, you can resume building the record by clicking the link to the client record in the Client Creation box on the home page.

Editing an Existing Client

To edit existing client information:

28. Select the parent client from the Client Search field.
29. Click the Edit Client button.
30. Edit the desired information by clicking a tab on the left-hand side of the screen.
31. Click the Save button.

Using the Profiles Module

The Profiles module allows you to create a new profile, and view or edit an existing profile.

NOTE: A client requires a minimum of one profile for merchant boarding.

Creating a New Profile

To create a new profile:

32. Click the Create Profile button.
33. Enter the Profile Information.

Field Name	Definition
Name	The name of the new merchant profile.
Client	The name of the client associated with the profile.
Country	Country associated with the merchant profile.
Reader Type	The Reader type that is supported for this profile.

34. Select a Processor.
35. Click the Save & Next button.
36. Select Transactional Elements settings.

Field Name	Definition
Discount	Enables/Disables the appearance and configuration of a discount.
Tip	Enables/Disables the appearance and configuration of a tip.
Surcharge	Enables/Disables the appearance and configuration of a surcharge.
Tax	Disables/Enables referencing tax in a transaction, modifying the tax value, and the appearance of tax across the system.
Calculation Logic	For the enabled transaction elements (tip, tax, discount, surcharge), allows the choice of the calculation method to use for generating a transaction total from a sub-total.

37. Select Transaction Type settings.

Field Name	Definition
Offline	Disables/Enables the appearance and configuration of the offline setting for the ROAMpayX application.
Manual Entry	Disables/Enables the appearance and configuration of manual entry within ROAMpayX.
AVS	Address Verification System. Used to verify a customer's billing address.
CVV	Card Validation Code. A 3-4 digit number on a credit card used to establish identity.
Virtual Terminal	Enables/Disables the virtual terminal application from within the myROAM portal.
Refund	Disabling the refund option will prevent a merchant from providing a refund facility to a customer, and disable the following options: • ROAMpayX • myROAM
Smart Refund	Disables/Enables the configuration of the smart refund setting. Enabling smart

Field Name	Definition
	refund will allow a merchant to attempt a void prior to submitting a refund for the transaction in ROAMpayX.
Void	Disabling the void option will prevent a merchant from providing the void facility to a customer, and disable the following options: • Void Last Transaction: Enables/Disables the option for voiding the last transaction. • Void Unsettled Transaction: Enables/Disables the option for voiding all unsettled transactions.

38. Click the Save & Next button.

39. Select Merchant Setup settings.

Field Name	Definition
Reader Device Management	Enables/Disables the use of reader management by serial number across merchant accounts.
Merchant can change the DBA's name	Enables/Disables a merchant to adjust their DBA name value.
Merchant can change the DBA Address	Enables/Disables a merchant's ability to adjust their DBA address information from myROAM or ROAMpayX.
Show Terminal Receipt	Enables/Disables the provision of an additional receipt page in ROAMpayX that can be written out by a merchant and provided to a customer at the time of the transaction.
Collect Optional Information	Controls the collection of optional customer information at the completion of the transaction, and display this information across relevant portals.
Inventory Management	Controls a merchant's access to use local device inventory in the app.
Enable Batch Closure	Batch feature for iCMP. For processor platforms that do not support a batch upload process – this is a configuration item to switch on 'batch upload' for those processor platforms. ROAMpayX will control how the batch upload configuration setting is interpreted.
Signature Capture	Enables/Disables the signature feature in the app.
ROAMpayX Timeout	Determines the timeout/lock value for the mobile application.
Merchant Address Collection	Controls the input of a merchant's address during merchant boarding. Determine whether merchant address entry is optional, or mandatory.
Merchant MCC/SIC Code Collection	Controls the input of a merchant's address during merchant boarding. Determines whether merchant address entry is optional, or mandatory.
Merchant Tax ID Collection	Controls if the merchant tax ID input field is mandatory when creating a merchant account.

40. Enter Receipt Information.

Field Name	Definition
Reply-To Address	For all messaging notifications sent from the ROAM system, this will be the FROM email address.
Reply-To Name	For all messaging notifications sent from the ROAM system, this will be the FROM email name.
Map Information	Selection of the source map image when providing a customer receipt.
Support Email	The support contact e-mail address for any merchant support queries.
Support Phone	The support contact phone number for any merchant support queries.
Support Message	The support contact message for any merchant support queries. For example 'Lines are open Mon-Fri 8am – 8pm EST'.

41. Configure Support Information.

Field Name	Definition
Contact Us/Support Information	Set to Yes to display the contact info in the portal. Otherwise set to No.
Merchant Support Contact Email	The support contact e-mail address for any merchant support queries.

42. Click the Save & Next button.

43. Select a myROAM Theme on the Theme Setup page.

44. Click the Save & Next button.

45. Review the Profile information. If you're satisfied they are correct click the Create button.

Once you've created a profile you can email a PDF copy of it to another user by using the Share button, or generate a PDF to print by using the Print Summary button.

If you stop creating a profile prior to clicking the Create button, you can resume building the profile by clicking the profile name link in the Profile Creation box on the home page.

Viewing Existing Profiles

To view your existing profiles select a client from the Client field. The profiles associated with that client will display in the Profile Information pane.

Editing Existing Profiles

To edit an existing profile:

46. Select a client from the Client field.

47. Select a profile from the Profile Information field.
48. Click the Edit Profile button.
49. Make the desired changes to the profile.
50. Click Save.

Using the Merchants Module

The Merchants module allows you to create a new merchant, create a sub-merchant, edit an existing merchant, and configure transaction, Reader, and receipt information for existing merchants.

Creating a Merchant

To create a merchant:

51. Click the Create Merchant button.
52. Enter the Merchant Account details.

Field Name	Definition
Client	The name of the client associated with the merchant.
Profile	The name of the associated merchant profile. This provides the basis for the configuration of the merchant. A merchant will be automatically associated with this profile going forward.
Country	The name of the merchant address country.
DBA	The Doing Business As name for the merchant account.
First Name	The first name of the merchant.
Middle Name	The middle name or initial of the sub-merchant.
Last Name	The last name of the sub-merchant.
Address 1	The address line 1 of the merchant business address.
Address 2	The address line 2 of the merchant business address.
City	The city of the merchant business address.
State	The state, province or region of the merchant business address.
Zip Code	The postal code for the merchant business address.
Mobile Phone	The mobile phone number of the merchant.
Business Phone	The business/office phone number of the merchant.
Other Phone	An additional phone number of the merchant. This could include an additional

Field Name	Definition
	number, fax number or other number which the merchant may provide for contact.
Username	The username of the merchant.
Email	The email address for the merchant. This will be used for the initial welcome email delivery, receipts and sub-merchant boarding notifications.
Language	A user will be able to select the default language for the merchant. This will be the initial login/default language assigned to the merchant for receiving the Welcome Email.
Currency	The currency for merchant transactions.

53. Click the Next button.
54. Select a Processor Platform.
55. Enter a Merchant ID.
56. Optionally, enter a Terminal ID, Merchant Tax ID, MCC Category, MCC/SIC Code and S/N.
57. Click the Next button.
58. Review the Merchant information. If you're satisfied it is correct click the Create button.

If you stop creating a merchant record prior to clicking the Create button, you can resume building the record by clicking the link to the merchant in the Merchant Creation box on the home page.

Managing Readers

Use the Reader Management tab to add the Readers that will be used by merchants.

NOTE: The serial number of the Reader must be added to the Reader Management page before it can be used by a merchant.

To add a Reader:

59. Enter the serial number in the S/N field.
60. Click the Add Reader button.

Configuring Customer Receipts

Use the fields on the Receipt Management tab to customize the email receipt customers receive by adding your:

- Company logo
- Business name
- Personalized message
- Customer service email address and phone number
- Website URL

- Social media information

Audit

The Audit tab provides you with an audit trail of all merchant account changes including:

- ROAMsupport Username
- Datestamp
- Change Action
- Field Change
- Old Field Value
- New Field Value
- Comments

Click on a row in the Audit Information table and the audit information displays in the Configuration Information pane.

NOTE: The audit history goes back to July 2013. Changes made previous to this date are not reported in ROAMsupport.

Connecting to myROAM

For help in troubleshooting merchant issues, you can log into myROAM as a merchant using the Impersonation feature on the myROAM tab of the Merchant Summary.

Click the Launch myROAM button and the myROAM portal will display in a separate browser window. Once the browser has launched you will be on the merchant's Dashboard.

Using the Roles Module

Use the Roles module to view standard roles, create new roles, and edit or delete existing roles.

Viewing Standard Roles

ROAMsupport has preconfigured roles you can associate with users. You can also create new, or custom, roles.

To view the permissions associated with a Standard Role:

61. Select a client from the Clients field.
62. Click the role link in the Standard Roles field.

The permissions associated with that role will display in the main panel.

NOTE: You cannot delete a Standard Role.

Creating a New Role

To create a new role:

63. Select a client from the Clients field.
64. Click the Create Role button.
65. Enter the Role Information.

Field Name	Definition
Role Name	The name of the new role.
Client	A drop-down field displaying the client name.
Role Based On	The role the new role is based upon. This populates the permissions listing checkboxes with the information from the selected role. A user can then choose to adjust the permissions.

66. Indicate what permissions will be associated with the role by selecting the associated checkbox.

Permission Name	Definition	Sub-Permissions
Client Management	The ability to access the client information.	Create – Allows a user to create a client. View – Allows a user to search and view all client information. Edit – Allows a user to edit any client information field. Status – Allows a user to update the status of the client.
Profile Management	The ability to access the profile information.	Create – Allows a user to create a profile. View – Allows a user to search and view all profile information. Edit – Allows a user to edit any profile information field. Status – Allows a user to update the status of the profile.
Role Management	The ability to access role information.	Create – Allows a user to create a role. View – Allows a user to search and view all role information. Edit – Allows a user to edit any role information field.
User Management	The ability to access user information.	Create – Allows a user to create a profile. View – Allows a user to search and view all profile information. Edit – Allows a user to edit any profile information field. Status – Allows a user to update the status of the profile. Reset Password – Allows a user to reset the password of another user.
Merchant Management	The ability to access the merchant information.	Create – Allows a user to create a profile. View – Allows a user to search and view all profile information. Edit – Allows a user to edit any profile information field. Status – Allows a user to update the status of the profile. Reset Password – Allows a user to reset the password of another user.

Permission Name	Definition	Sub-Permissions
		Resend Welcome Email – Allows a user to resend the welcome email to another user. Audit Configuration – Allows a user to view audit information. myROAM – Allows a user to log into myROAM using the impersonation feature.
Transaction Management	The ability to access the transaction information.	N/A
Reader Management	The ability to access the Reader information.	Create – Allows a user to access reader information. View – Allows a user to search and view all reader information. Edit – Allows a user to edit reader information. Status – Allows a user to update the status of the reader.
Receipt Management	The ability to access the receipt information.	View – Allows a user to search and view all receipt information. Edit – Allows a user to edit any receipt field.

67. Click the Create button.

Deleting a Client Role

To delete a Client Role:

68. Select a role from the Client Roles field.
69. Click the Delete Roles button.
70. Confirm your delete.

Using the Users Module

The User module allows you to create a new user, edit an existing user, and search for a user.

Creating a New User

To create a new user:

71. Click the Create User button.
72. Enter the User Information.

Field Name	Definition
Username	The username of the new user.
Client	A drop-down to select the client value of the new user. A user will belong to this client.
Role	A user will be able to select the role for the new user. This provides functionality and security access to the new user.
First Name	The first name of the user.
Middle Name	The middle name or initial of the user.
Last Name	The last name of the user.
Language	The default language for access to ROAMsupport.
Employee ID	The employee ID of the user.
Business Email	The business email address of the user. This is the address all emails will be sent to.
Personal Email	The personal email address of the user.
Phone Number	The business phone number of the user, such as their desk/office phone number.
Mobile Number	The mobile phone number of the user.

73. Click the Create button.

A user can only be associated with one client and one role.

Editing User Information

Once a user has been created you can edit their information:

74. Select a client from the Client field.
75. Select a user from User Information pane.
76. Double-click on the row in the user list or click the Edit User button.
77. Make the desired edits.
78. Click the Save button.

Searching for a User

You can search for a specific user using one of the following methods:

Enter search information in the Search field, then click the Search button.

Or

Enter information in the search fields in the left-hand pane and click the Search button.

The search results will be displayed in the User Information pane.

Appendix A: Calculation Logic Options

Use the following table to determine which Calculation Logic option to choose when creating a profile. Please refer to the original PDF for the full Calculation Logic diagram (Appendix A).