

Partner Portal

User Guide

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CAYAN[®]

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1. Overview

The Partner Portal is an online tool that you can use to create new business leads and view your residuals. Using the Partner Portal, you can:

- Create new leads
- View and download a list of your leads
- Download copies of your residuals
- Access marketing and API information

1.1 Layout of the Partner Portal

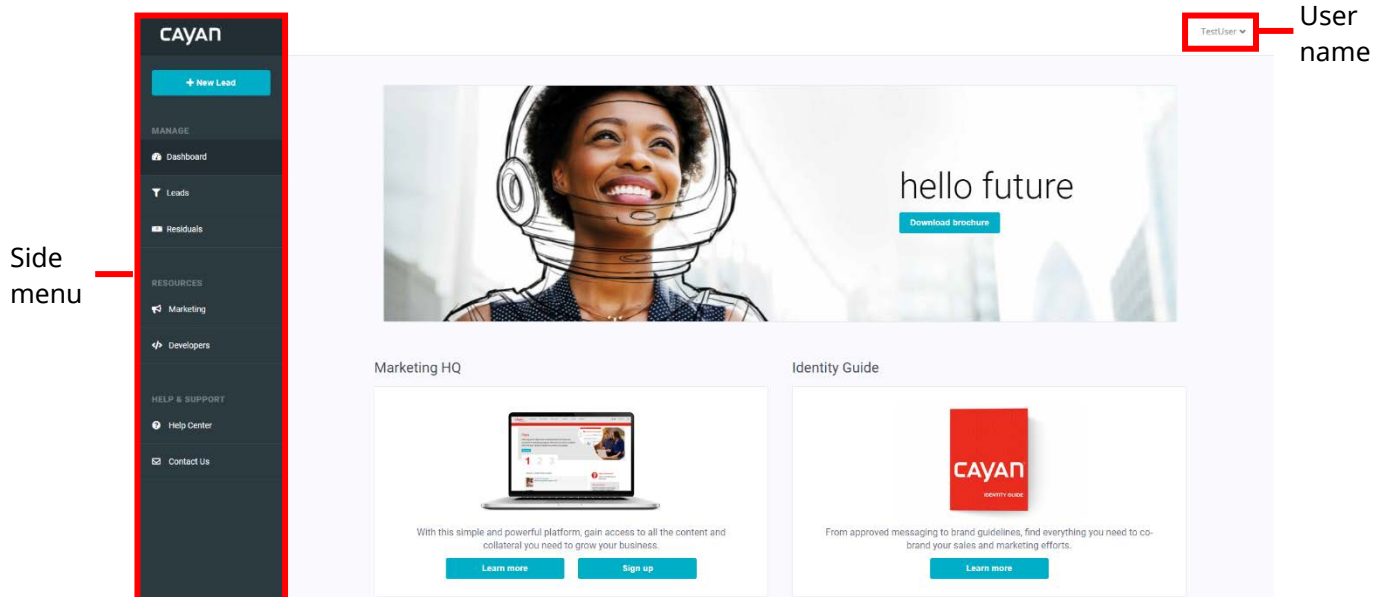


Figure 1. Partner Portal

The side menu includes the following options:

- **+ New Lead:** Add a prospective merchant to the Partner Portal.
- **Dashboard:** Navigate to the front page of the Partner Portal.
- **Leads:** View, search for, or download a list of your prospective merchants.
- **Residuals:** View a list of the reports about your boarded merchants.
- **Marketing:** Access resources for co-branded sales and marketing.
- **Developers:** Access our API documentation, which developers use to integrate with our products and services.
- **Help Center:** Access our Help Center, where you can find more information about how to use our products and services.
- **Contact Us:** View our contact information.

1.2 Accessing the Partner Portal

1.2.1 Signing in to the Partner Portal

1. Open your web browser.
2. In the address bar, type <https://cayan.accessaccountdetails.com/>.
3. Press **Return**.
4. Type your **Username** that we or your system administrator provided you with.
5. Type your **Password**.
6. Click **Sign In**.
7. Click the **Partner Tools** tile.

1.2.2 Changing your password

1. From the top-right of the Partner Portal, click your **user name**.
2. From the drop-down menu, click **Change Password**.
3. Type your **Current Password**.
4. Type your **New Password**.
5. In the **Confirm Password** field, re-type your new password.
6. Click **Change Password**.



Note: When you click **Change Password**, the Partner Portal redirects you to the sign-in page to sign in using your new password. This is to help protect your account's security.

1.2.3 Resetting your password

If you forget your password, use the sign-in page to reset it. To do this:

1. Open your web browser.
2. In the address bar, type <https://cayan.accessaccountdetails.com/>.
3. Press **Return**.
4. Click **Forgot your username/password?**
5. In the **User Name** field, type the user name connected to your account.
6. Click **Reset Password**.

1.2.4 Forgotten your user name

If you forget your user name, we can email it to you. To do this:

1. Open your web browser.
2. In the address bar, type <https://cayan.accessaccountdetails.com/>.
3. Press **Return**.
4. Click **Forgot your username/password?**
5. Click **Can't remember your user name?**
6. In the **Email Address** field, type the email address connected to your account.
7. Click **Recover Account**.

1.2.5 Signing out of the Partner Portal

1. From the top-right of the Partner Portal, click your **user name**.
2. From the drop-down menu, click **Sign Out**.

1.3 Useful resources

From the Dashboard, you can access the following resources:

- **Marketing Brochure:** A booklet that you can give prospective merchants to show them what we offer, including Genius, Genius Checkout, and InGenius Incentives.
- **Marketing HQ:** A platform that you can use to run campaigns, manage social media, and access co-branded marketing materials.

Other resources that you can access from the side menu, include:

- **Help Center:** Access to our Help Center, where you can find more information about how to use our products and services.
- **Marketing documentation and Identity Guide:** Resources that you may need for co-branded sales and marketing.
- **Developer documentation:** A link to our API documentation, which developers can use to integrate with our products and services.

1.4 Contacting us

If you have any questions about using the Partner Portal, you can contact our Partner Concierge team by:

- Emailing your question to partnerconciierge@cayan.com
- Calling us at **(1) (888) 302-2926**

2. Leads

In the leads page, you can:

- Create a new lead
- View your leads

2.1 Creating a new lead

To add a new lead:

1. On the side menu, click **+ New Lead**.
2. Type the following Contact Information:
 - a. **First Name**
 - b. **Last Name**
 - c. (Optional) **Phone**
 - d. **Email**
3. Type the Business Information:
 - a. **Company Name**
 - b. (Optional) **Products Sold / Services Provided**
 - c. (Optional) **Comments**
4. Enter the Referral Information:
 - a. Type the name of the **Referring Representative**.
 - b. (Optional) Type the **Referring Rep Email**.
 - c. (Optional) Type the **Referring Rep ID**.
 - d. From the drop-down menu, select your **Partner Group**.
5. Click **SUBMIT LEAD**.

2.2 Viewing your leads

- On the side menu, click **Leads**.

The screenshot shows the 'Leads' management interface. Annotations include:

- Status menu:** A dropdown menu currently set to 'All'.
- Data fields:** A table with columns: COMPANY, TYPE, SOURCE, STATUS, STATUS DATE, SALES REP.
- Search tool:** A text input field.
- Number of results:** A dropdown menu showing '25' results.
- Download buttons:** Two buttons for downloading data.
- Information button:** A small icon next to the first lead row.

COMPANY	TYPE	SOURCE	STATUS	STATUS DATE	SALES REP
Test MDP	Internet	Existing Merchant	APPROVED	3/27/2017	Stephen
Test MDP	Retail	Referral	PROSPECT	3/14/2017	Stephen
Test MDP	Retail	Browser	PROSPECT LOST	3/8/2017	Stephen
Test MDP	Internet	Refer a Merchant	CLOSED	3/7/2017	Adam

Figure 2. Leads



Note: We update a lead's status during boarding, which the Partner Portal displays.

2.2.1 Viewing the contact information for a lead

- Click the lead's information button.

2.2.2 Searching for a lead

- In the search tool, type a date or words relating to the lead. For example, to search for leads with "Inc" in their company name, type "Inc."

The screenshot shows the 'Leads' management interface with a search for 'Inc'. The search results are as follows:

COMPANY	TYPE	SOURCE	STATUS	STATUS DATE
Example Business Inc		Referral	PROSPECT	3/14/2018
Example Retail and Health Inc.	Retail	Referral	CLOSED	2/22/2018

Figure 3. Example search for "Inc"

2.2.3 Sorting your results by status

- From the **Status** drop-down menu, click the status of the leads you want to view.

2.2.4 Sorting your results by data field

You can sort your results by the following data fields:

- Company
- Type
- Source
- Status
- Status Date
- Sales rep

To do this:

- Click the data field to sort your data. For example, click **Sales Rep** to sort the leads by their sales representative.

2.2.5 Changing the number of leads the Partner Portal displays

- From the **number of results** drop-down menu, select the number of results you want the Partner Portal to display.

2.2.6 Downloading your leads

You can download a list of your leads as a .pdf file, or a .csv file. To do this:

1. (Optional) Search or sort your leads to get a specific set of results.
2. In the top-right of the portal, click the download button.

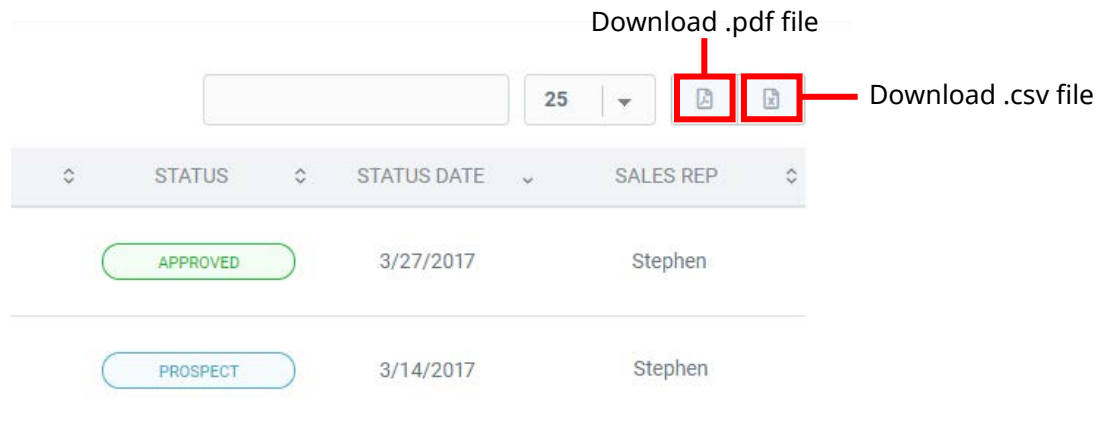


Figure 4. Download buttons

3. Residuals

When we board one of your leads, we report their account activity as part of your residuals. The residual report includes:

- The merchant’s details
- The number and dollar value of transactions processed by the merchant
- A breakdown of income, expenses, profit, and percentage split



Note: You can view residual reports from the last 24 months.

3.1 Downloading your residuals

To download a copy of your residuals:

1. On the side menu, click **Residuals**.
2. From the drop-down menus, select the month and year of the report you want to download.
3. Click **Go**. The Partner Portal displays available residual reports.
4. On the residuals report you want to download, click **Download**.

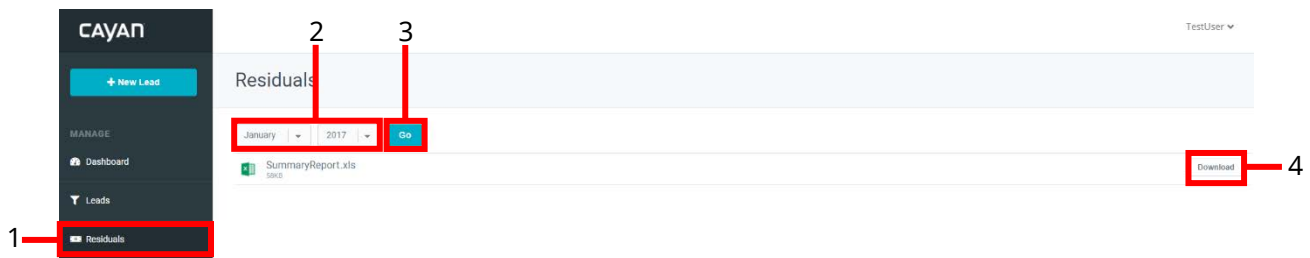


Figure 5. Downloading your residuals

The logo for Cayan, featuring the word "CAYAN" in a bold, white, sans-serif font with a registered trademark symbol (®) to the upper right. The logo is positioned in the bottom right corner of the page, which has a red background. The rest of the page has a light blue background with a pattern of overlapping, semi-transparent hexagons.

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