



Unbind 3C Portal User Guide

Version 1 – 2024



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Objective

The objective is to improve our Swap Processes for all customers by removing the need for them to raise support tickets simply to unbind a Terminal/TID from the outgoing serial number (i.e. a broken/faulty terminal). By adding a “unbind TID” function within the ‘Payment Gateway’ ‘EMV Terminal’ Section of the Merchant 3C Portal, those merchants who have the required access rights can now unbind a terminal within the Portal.

This will reduce the reliance on Planets Customer Support teams as Merchants can now self-manage their estate, thus, improving the terminal swap process.

Only users who have been granted the ‘Unbind’ function via the 3C Portal ‘Master Admin Account’ account will be able to “unbind” a terminal via the 3C Portal, all other users’ access is restricted, by default.

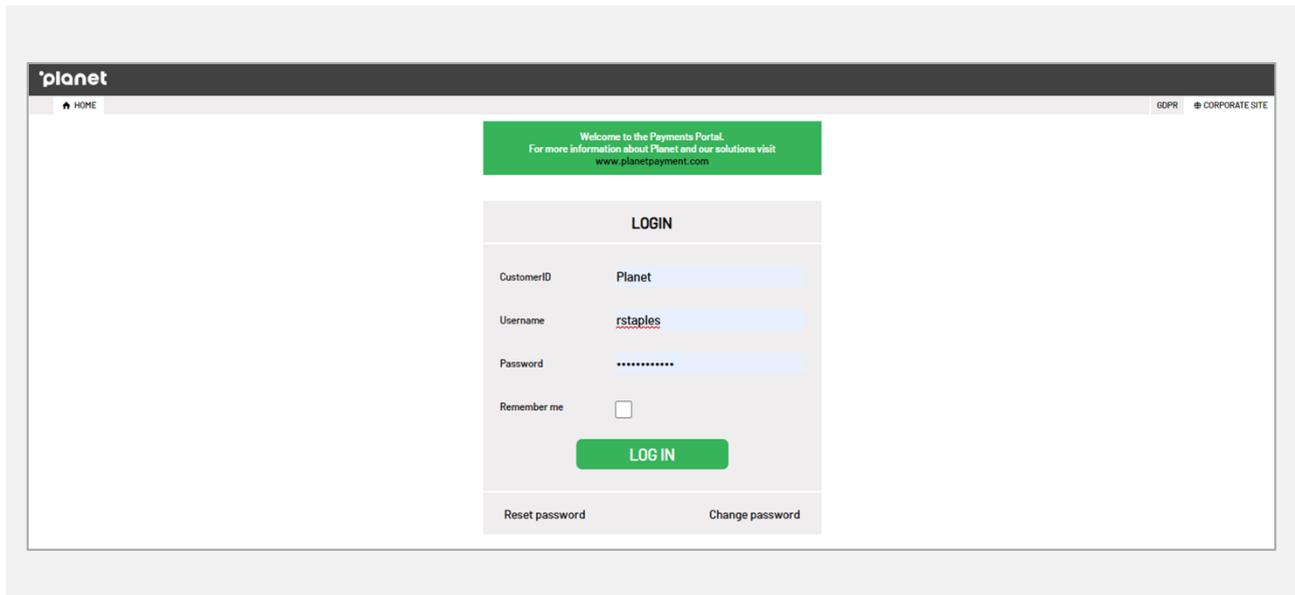
1. Logging in to 3C Portal

Prior to completing any task on 3C Portal. The user must login via the home screen.

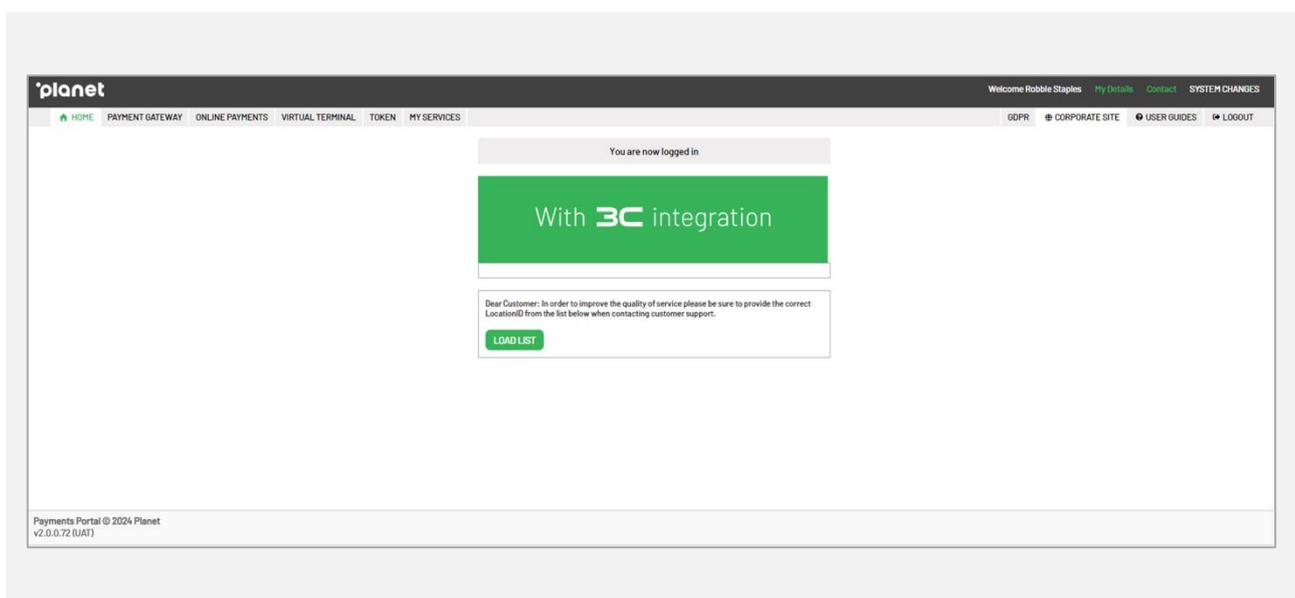
3C Portal

The Merchant must login with their:

1. Customer ID
2. Username
3. Password



Upon successful login completion, the user will be presented with the below screen.



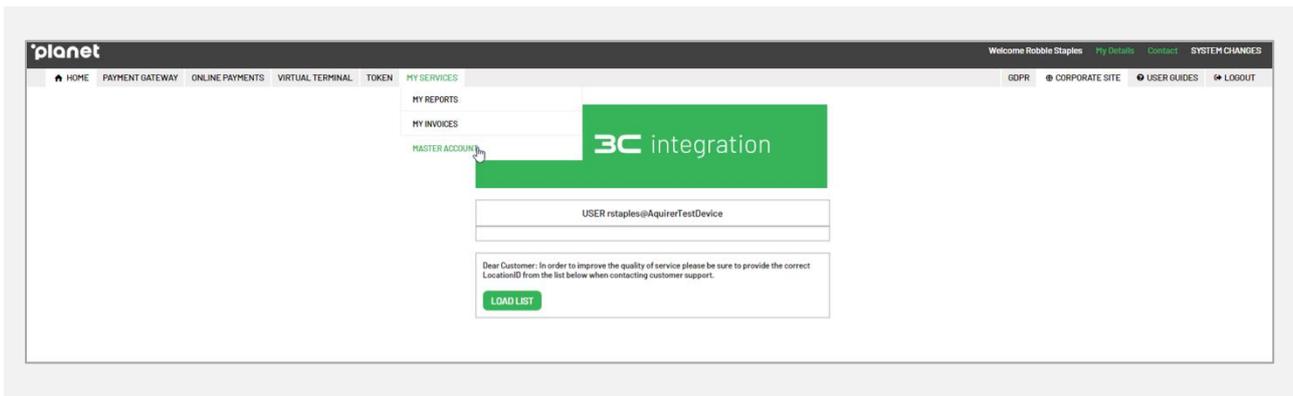
2. User Access Enabling Unbinding Functionality

Not all users will have access to Unbind terminals.

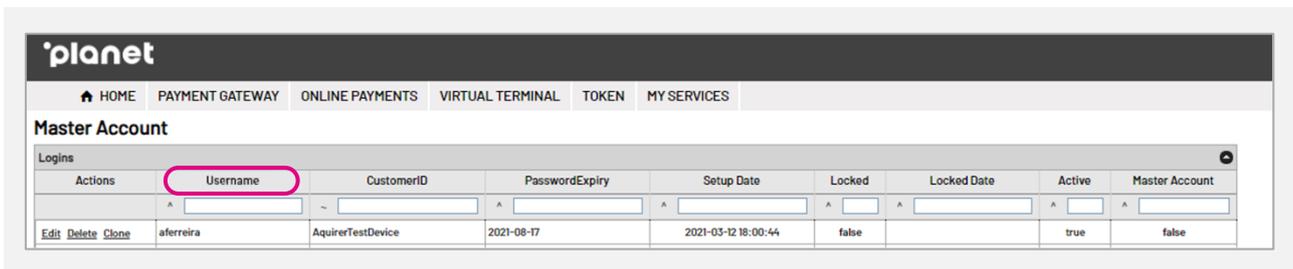
Should a Merchant wish to grant access to user, their permissions must be enabled via the 'Master Account' section on 3CPortal.

Note: Only Users with "Master Account" permissions set to "TRUE" on 3C Portal can enable the Unbinding functionality for additional users by following the below steps

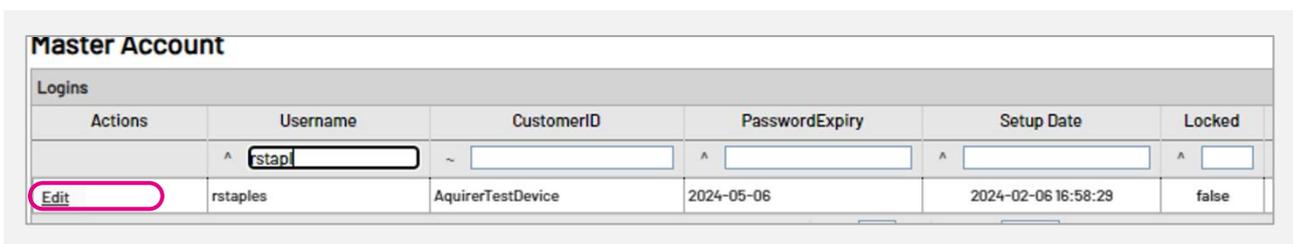
1. Select Master Accounts.



2. Search by username.



3. Select 'edit'.



4. Users will be presented with the below.

General | **Payment Gateway** | Online Payments | Virtual Terminal | iBatch | iRecur | Token | My Services

General

Username: PasswordExpiry:
ContactName: SetupDate:
Email: TelNo:
LastBadPasswordDate: LockedDate:
BadPasswordCount: Duplicate Notification:
Locked: Active:
CustomerID:

Payments Portal

Payment Gateway: Online Payments: Virtual Terminal: iBatch: iRecur: Token: My Services:

ADD **UPDATE** **CANCEL** **RESEND ACCOUNT DETAILS** **RESET PASSWORD** **CLONE** **EXPORT**

Documentation for this section can be found by clicking [here](#) and selecting "Master Account Management Basic User Guide" or "Master Account Management Extended User Guide" from the list.

5. Select the 'Payment Gateway' tab.

General | **Payment Gateway** | Online Payments | Virtual Terminal | iBatch | iRecur | Token | My Services

Permissions

Authorisations: Transactions: Duplicate: Reversal: FloorLimit:
Completion: Integra APM:

Actions

Reverse: Refund: Release: ResetAuthorise: UnBind Terminal:

ADD **UPDATE** **CANCEL** **RESEND ACCOUNT DETAILS** **RESET PASSWORD** **CLONE** **EXPORT**

Documentation for this section can be found by clicking [here](#) and selecting "Master Account Management Basic User Guide" or "Master Account Management Extended User Guide" from the list.

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6. To enable a user to unbind a terminal, the Master account user must tick/select 'Unbind terminal' function and select 'update'.
 - a. Unbind terminal function (1)
 - b. Update (2)

The screenshot displays the user management interface for a Master Account, specifically the 'Payment Gateway' tab. It is divided into two sections: 'Permissions' and 'Actions'.

Permissions:

- Authorisations:
- Transactions:
- Duplicate:
- Reversal:
- FloorLimit:
- Completion:
- Integra APM:

Actions:

- Reverse:
- Refund:
- Release:
- ResetAuthorise:
- UnBind Terminal: (highlighted with a pink circle)

Buttons: ADD, UPDATE, CANCEL, RESEND ACCOUNT DETAILS, RESET PASSWORD, CLONE, EXPORT

Documentation for this section can be found by clicking [here](#) and selecting "Master Account Management Basic User Guide" or "Master Account Management Advanced User Guide"

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The second screenshot shows the same interface after the 'UnBind Terminal' checkbox has been checked and the 'UPDATE' button has been highlighted with a pink circle.

Permissions:

- Authorisations:
- Transactions:
- Duplicate:
- Reversal:
- FloorLimit:
- Completion:
- Integra APM:

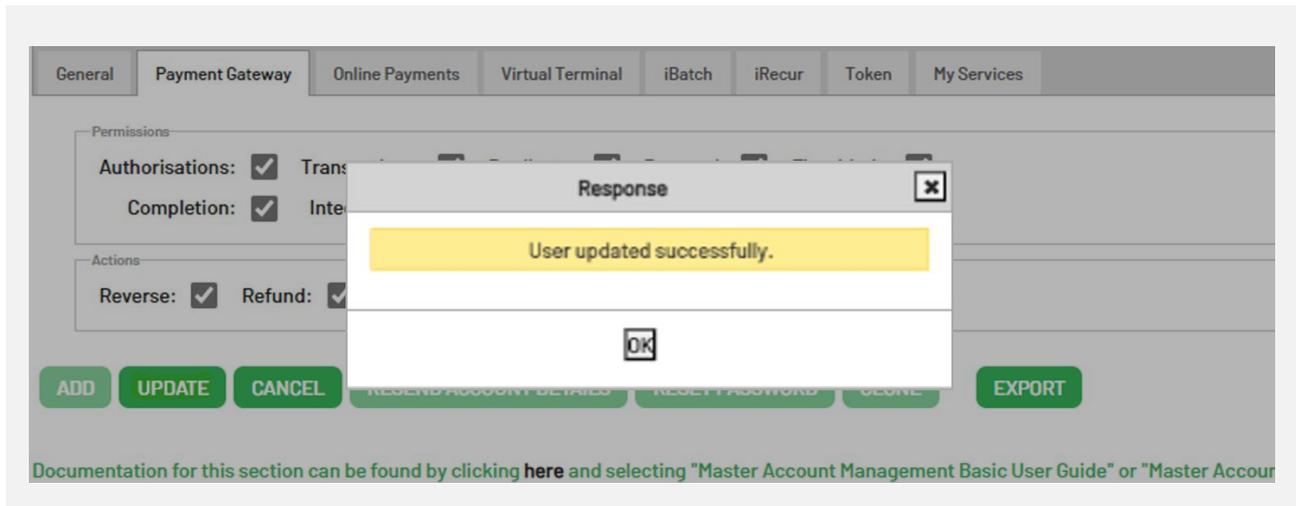
Actions:

- Reverse:
- Refund:
- Release:
- ResetAuthorise:
- UnBind Terminal: (highlighted with a pink circle)

Buttons: ADD, UPDATE (highlighted with a pink circle), CANCEL, RESEND ACCOUNT DETAILS, RESET PASSWORD, CLONE, EXPORT

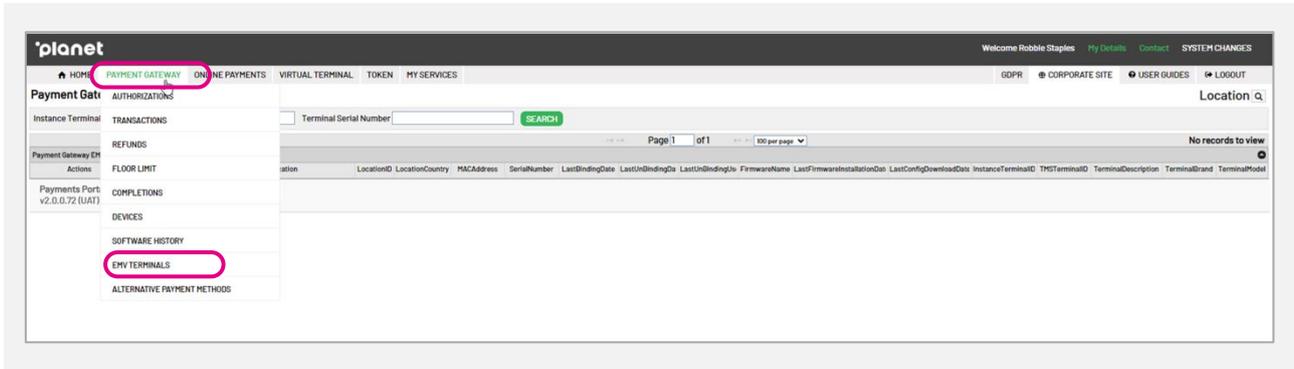
Documentation for this section can be found by clicking [here](#) and selecting "Master Account Management Basic User Guide" or "Master Account Management Advanced User Guide"

7. Upon selecting update – 3C Portal will display 'User updated successfully' > Select 'OK'.



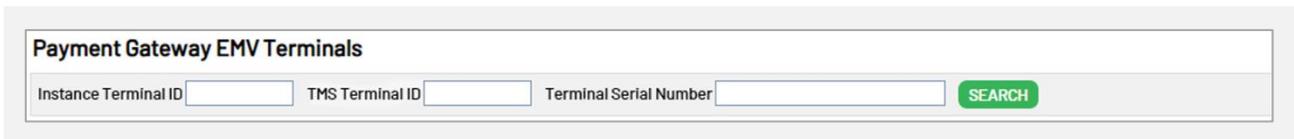
3. Unbinding functionality via 3C Portal

1. Select 'Payment Gateway'.
2. Select 'EMV Terminals'.

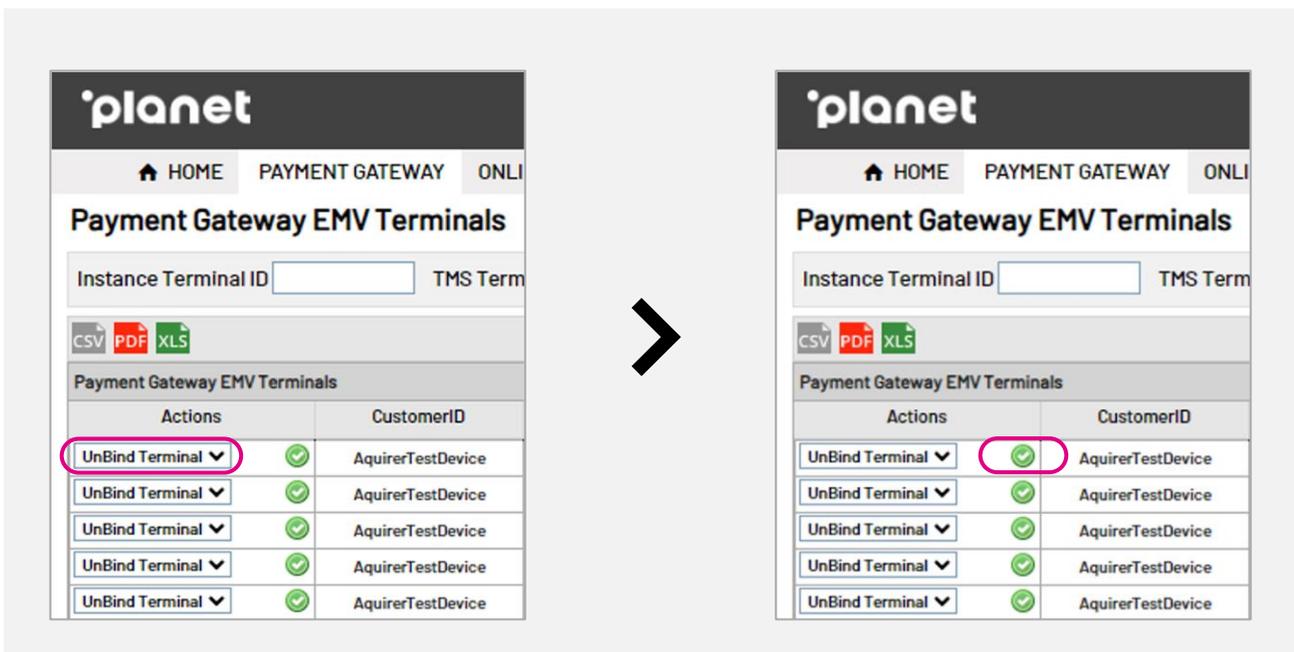


3. You will have the option to search by the following parameters:
 - a. Search by location (Instance Terminal ID)
 - b. Terminal ID or
 - c. Terminal Serial Number
4. Select 'Search'.

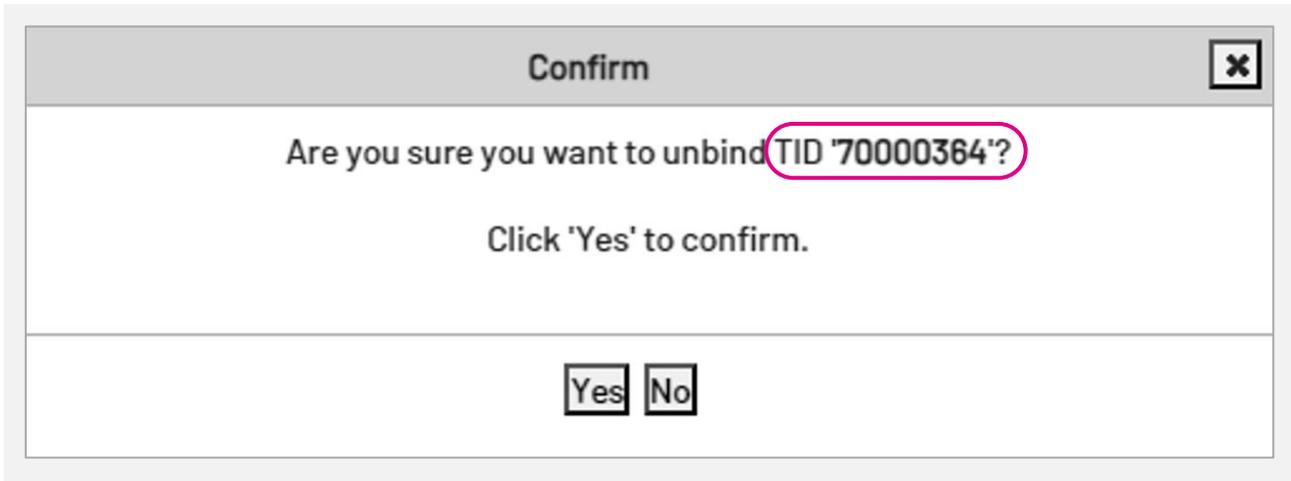
By selecting 'Search' it will display all the merchant's list of terminals.



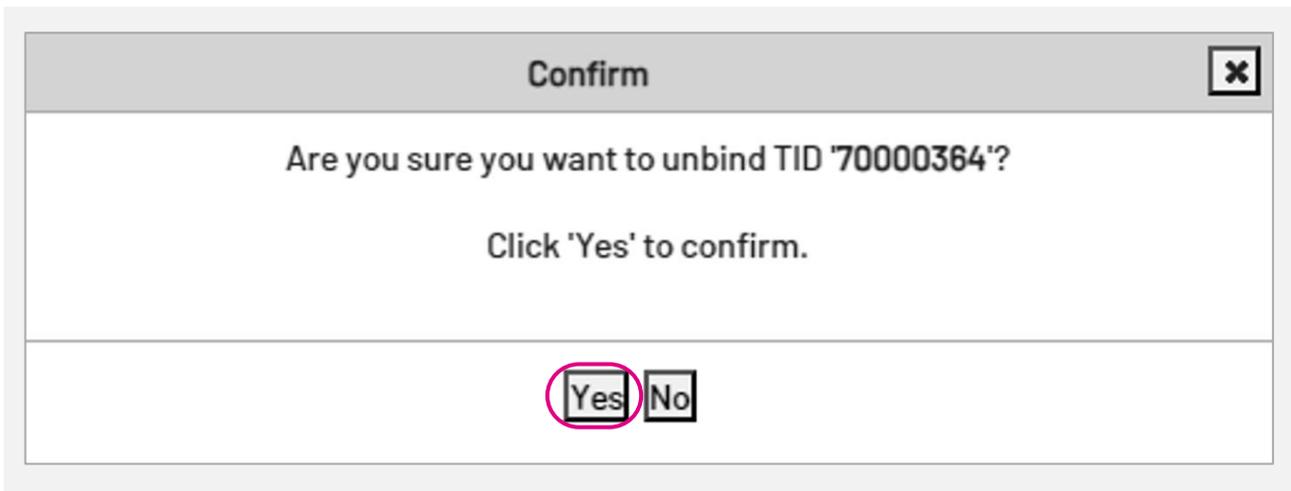
5. 3C Portal will display the list of terminals
6. Under 'Actions' users will see the 'Unbind Terminal' function per terminal.
7. To unbind a terminal, Users must select 'Unbind Terminal' and **select the green tick**.



8. Users will be prompted/presented with the below screen asking them to confirm that they want to unbind a specific TID number.

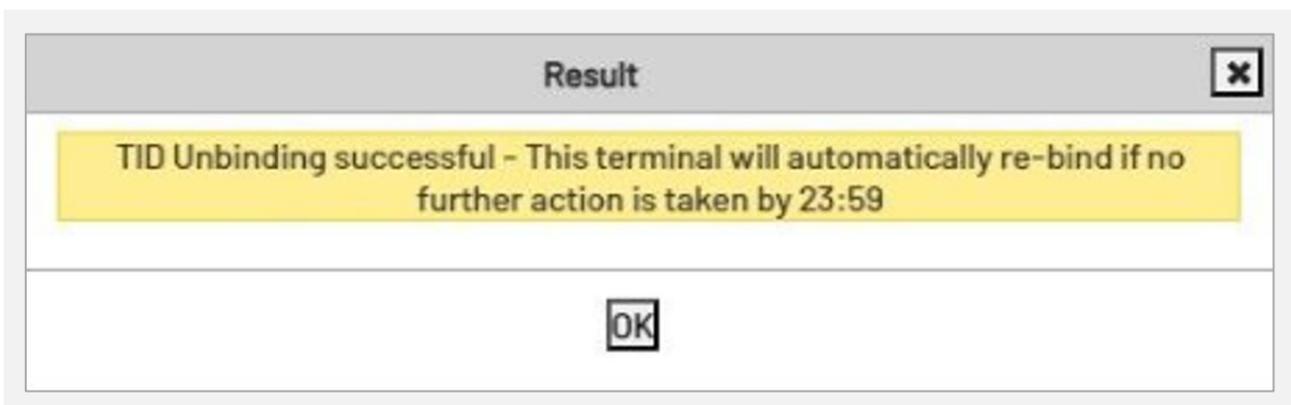


9. Users will need to select 'Yes' should they wish to proceed with unbinding a TID.



10. Assuming the unbinding is successful, users will be informed, and the below message will be displayed.

Note: Should a Terminal ID (TID) not be bound to another terminal serial number by 23:59 on the same day, the old serial number will rebind to the original Terminal ID (TID) during the overnight TMS call processes which terminals do sometime after midnight each night.



11. Under EMV Terminals a user can see when a terminal was last unbound and who completed the task.

- Date (YYY/MM/DD)
- Time (HH:MM:SS)

SerialNumber	LastBindingDate	LastUnBindingDate	LastUnBindingUser	FirmwareName	LastFirmwareInstallationDate	LastConfigDownloadDate
		2024-02-08 16:40:17	3CPortal/vlopes_old	1.0.5.23_A920Pro.3C.04.01.01_230	2023-09-05 14:49:57	2024-01-19 15:33:38
		2024-02-08 16:39:11	3CPortal/vlopes_old	1.0.5.6b_ID5.3C.11.0_210505_I720	2021-09-23 01:51:59	2022-06-29 12:02:55

12. Should a terminal be unbound via Integra Portal, (Internal platform for Planet employees only) the last unbinding will display 'PlanetAdmin/user'.

Payment Gateway EMV Terminals

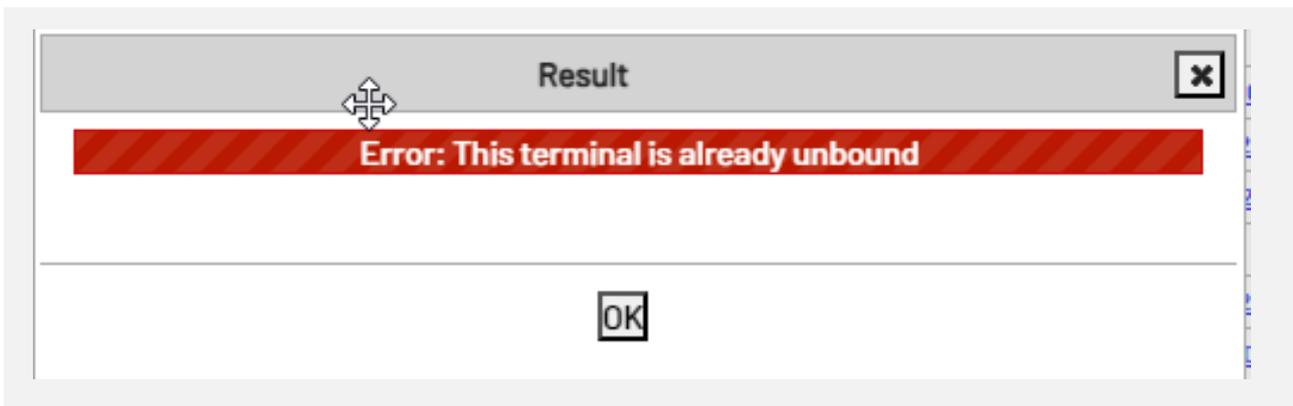
Instance Terminal ID TMS Terminal ID 00003057 Terminal Serial Number

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Actions	CustomerID	Location	LocationID	LocationCountry	MACAddress	SerialNumber	LastBindingDate	LastUnBindingDate	LastUnBindingUser	FirmwareName	LastFirmwareInstallationDate	LastConfigDownloadDate
<input type="button" value="UnBind Terminal"/>	Richard Test	Richard FAX HGH Test	000093	Ireland			2024-01-11 16:32:35		PlanetAdmin/umsuller	1.0.5.26_A920Pro	2023-09-11 09:36:34	2024-01-08 14:02:57

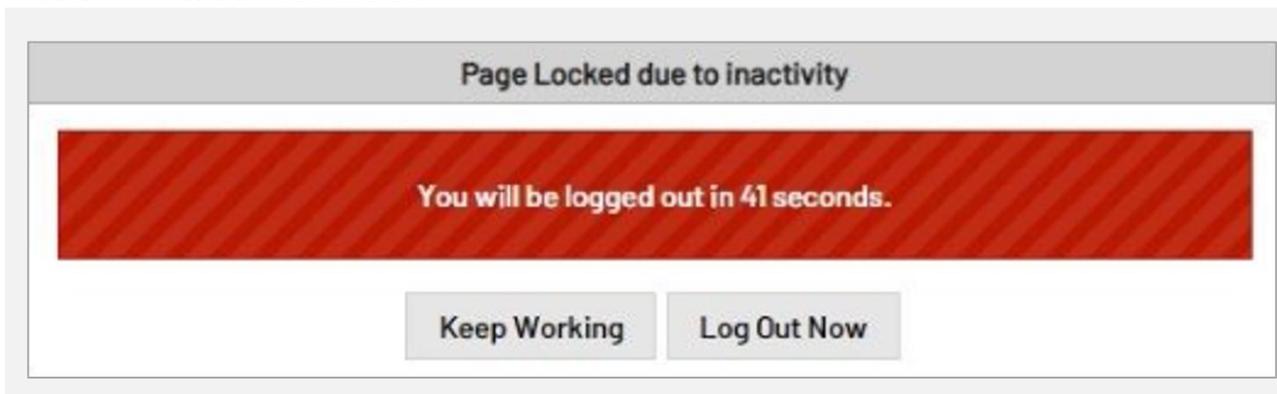
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13. If there is no Serial Number bound to a TID and there is an attempt to unbind the TID, the following error will pop up on screen.



Should this message appear, the user should check that they are trying to do unbind the correct terminal. If the terminal ID/Serial number is correct, then the terminal is already unbound and can be initialized. If the initialization fails, the user should contact Planet Support to have the issue investigated.

14. Should a user log into 3C Portal and not complete any actions, 3C Portal will automatically log the customer out after **15 minutes**.



4. Contact us



Need help?

If you have a technical issue or need support troubleshooting, please check the relevant portal for assistance.

Our Global Support Team will be glad to help.

Visit www.weareplanet.com/support

Disclaimer:

The procedures included in the document are only valid for brand new terminals. Terminals used beforehand may behave differently.