

# Unbind 3C Portal User Guide

Version 1 – 2024

weareplanet.com

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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

		G	OPR ⊕ CORPO	RATE SITE
W For more info	felcome to the Payments Portal. rmation about Planet and our solutions visit www.planetpayment.com			
	LOGIN			
CustomerID	Planet			
Username	rstaples			
Password				
Remember me				
	LOG IN			
Reset password	Change password			

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

ane	•						Welcome Ro	oble Staples My Detail	s Contact SYS	TEM CHA
A HOME	PAYMENT GATEWAY	ONLINE PAYMENTS	VIRTUAL TERMINAL	TOKEN	MY SERVICES		GDPR	CORPORATE SITE	O USER GUIDES	(+ L0G
						You are now logged in				
						With <b>3C</b> integration				
						Dear Customer: In order to improve the quality of service please be sure to provide the correct LocationID from the list below when contacting customer support.				
						LOADLEST				
inte Porta	0 2024 Pisnet									
72 (UAT)	to LOLAT INNEC									

#### 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 functionally for additional users by following the below steps

1. Select Master Accounts.

blanet		Welcome Robble Staples My Details Contact SYSTEM CHANG
● HOME PAYMENT GATEWAY ONLINE PAYMENTS VIRTUAL TERMINAL TOKEN	ANY SERVICES  INFORMATION  INFORMATION INFORMATION INFORMATION INFORMATION INFORMATION INFORMATION INFORMATI	ODPR

2. Search by username.

'plane	:								
A HOME	PAYMENT GATEWAY	ONLINE PAYMENTS	VIRTUAL TERMINAL	TOKEN	MY SERVICES				
Master Accou	int								
Logins									0
Actions	Username	CustomerID	Passwor	dExpiry	Setup Date	Locked	Locked Date	Active	Master Account
	^	~	<b>^</b>		A	^	^	^	^
Edit Delete Clone	aferreira	AquirerTestDevice	2021-08-17		2021-03-12 18:00:44	false		true	false

3. Select 'edit'.

Username	CustomerID	PasswordExpiry	Setup Date	Locked
^ rstapl	~	A	A	^
staples	AquirerTestDevice	2024-05-06	2024-02-06 16:58:29	false
	Username	Username CustomerID  ^ [stap] ~	Username     CustomerID     PasswordExpiry       ^ rstap!     ~     ^       ataples     AquirerTestDevice     2024-05-06	Username         CustomerID         PasswordExpiry         Setup Date           ^ stap!         ~         ^         ^         ^         _         _           staples         AquirerTestDevice         2024-05-06         2024-02-06 16:58:29



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  - 4. Users will be presented with the below.

General Payment G	ateway	Online Payments	Virtual Terminal	iBatch iR	ecur To	ken My	Services
General							
Use	ername:	rstaples	P	asswordExpiry	2024-05	-06	
Contac	ctName: [	Robbie Staples		SetupDate:	2024-02	-06 16:58:	29
	Email:	robbie.staples@we	areplar	TelNo	123		
LastBadPasswo	ordDate:			LockedDate:			
BadPasswor	dCount:	0	Duplica	te Notification:			
					Locked	Ac	tive: 🜌
CustomerID:	AquirerTes	tDevice				~	
Payments Portal							
Payment Gatew	vay: 🗸	Online Payments:	Virtual Ter	minal: 🔽 il	Batch: 🗸	iRecur:	✓ Token: ✓ My Services: ✓
ADD UPDATE	CANCEL	RESEND ACCO	UNT DETAILS	RESET PASSV	VORD 0		EXPORT
Documentation for this	section ca	an be found by click	ing <b>here</b> and sele	cting "Master A	ccount Ma	nagement	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
Authorisations: <table-cell> Tra Completion: 🔽 In</table-cell>	nsactions: 🗸 tegra APM: 🗸	Duplicate: 🗸	Reversal:	✓ Flo	orLimit:	2
Actions Reverse: Refund:	Release:	ResetAuthoris	se: 🔽 U	JnBind Te	rminal:	E
Documentation for this section ca	n be found by clic	king <b>here</b> and sele	ecting "Mas	ter Accou	nt Manager	ment Basic User Guide" or "Master Account Management Extended User Guide" from the list.
Payments Portal © 2024 Planet /2.0.0.72 (UAT)						

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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)

-Permiss	Payment Gateway	Online Payments	Virtual Terminal	iBatch	iRecur	Token	My Services	
Auth	norisations: 🗹	Fransactions: 🗸 Integra APM: 🗸	Duplicate: 🗸	Reversal:	Flo	orLimit:	<b>~</b>	
-Actions Reve	erse: 🔽 Refund	: 🗸 Release:	<ul> <li>ResetAuthori</li> </ul>	se: 🔽 🕻	InBind Te	rminal:	D	
ADD	UPDATE CANC	EL RESEND AC	COUNT DETAILS	RESET PA	SSWORD	CLON	E	ORT
umentat	tion for this section	can be found by cli	cking here and sele	ecting "Mast	ter Accou	nt Manage	ment Basic U	ser Guide" or "Master A
eneral	Payment Gateway	Online Payments	Virtual Terminal	iBatch	iRecur	Token	My Services	
Permiss	sions							
Permis: Auth	norisations: 🔽	Transactions: 🗸	Duplicate: 🗸	Reversal:	✓ Floor	orLimit:	2	
-Permis: Auth C	norisations: 🔽 🛛	Transactions: 🗸 Integra APM: 🗸	Duplicate: 🗸	Reversal:	✓ Floo	orLimit:		
Auth C	completion:	Transactions: 🗸 Integra APM: 🔽	Duplicate: 🗹	Reversal:	✓ Floo	orLimit:	2	
Permiss Auth C Actions Reve	norisations: 🔽 T completion: 🔽 erse: 🔽 Refund	Transactions: 🔽 Integra APM: 🔽 : 🔽 Release:	Duplicate: 🔽	Reversal:	Floo	orLimit: 💽 minal: 🔽		
Permis Auth C Actions Reve	norisations: 🔽 T completion: 🔽 erse: 🔽 Refund	Transactions: 🗹 Integra APM: 🔽 : 🔽 Release:	Duplicate: 🔽	Reversal: se:	Floo	orLimit:	D	
Permis: Auth C Actions Reve	avorisations: <table-cell> T completion: 🔽 erse: 🗹 Refund UPDATE CANCI</table-cell>	Transactions:  Integra APM:  Release:	Duplicate:  COUNT DETAILS	Reversal:	Floo	minal:		DRT



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

General	Payment Gateway	Online Payments	Virtual Terminal	iBatch	iRecur	Token	My Services
Permi	ssions				-		-
Aut	horisations: 🗹 🛛 Completion: 🔽	Inte	Respo	nse			×
Action	IS	_	User update	d success	fully.		
Rev	erse: 🔽 Refund:						-
			O	К			
ADD	UPDATE CANCE			MEGETTA		CLOIN	EXPORT
Documenta	tion for this section	can be found by clic	king <b>here</b> and sele	ecting "Mas	ter Accour	nt Manager	ment Basic User Guide" or "Master Accour

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#### 3. Unbinding functionality via 3C Portal

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

planet														Welcom	e Robt	le Staples			SYSTEM CHA	ANGES
A HOME	PAYMENT GATEWAY ONLINE PAYMENTS	VIRTUAL TERMINAL	TOKEN MY SEE	IVICES										GD	PR	CORPORAT	SITE	O USER GUID	es 🗭 Log	BOUT
ayment Gate	AUTHORIZATIONS																		Loca	tion
nstance Terminal	TRANSACTIONS	Terminal Seri	I Number		SEAF	RCH														
aument Gaterray EM	REFUNDS							Page	1 of 1	200 (P) <b>1</b>	00 per page 💙								No record	is to vie
Actions	FLOOR LIMIT	ation	LocationID LocationCo	untry MACAddress	s SerialNum	ber LastBi	andingDate La	astUnBindingDi	a LastUnBind	IngUs Firmw	vareName LastFi	irmwareInstallat	onDat LastConfigDov	nloadDate InstanceTen	minallO	TMSTerminalID	Terminal	Description Term	inalBrand Ter	rminalMod
Payments Port v2.0.0.72 (UAT)	COMPLETIONS																			
Payments Port v2.0.0.72 (UAT)	COMPLETIONS DEVICES																			
Payments Port v2.0.0.72 (UAT)	COMPLETIONS DEVICES SOFTWARE HISTORY																			
Payments Port v2.0.0.72 (UAT)	COMPLETIONS DEVICES SOFTWARE HISTORY 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.

Payment Gateway EMV Te	rminals		
Instance Terminal ID	TMS Terminal ID	Terminal Serial Number	SEARCH

- 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.

'planet	:					
A HOME	A HOME PAYME					
Payment Gate	eway E	MV Termir	nals			
Instance Terminal	ID	TM	S Term			
Payment Gateway EM	V Terminal	s				
Actions		CustomerID				
UnBind Terminal V	٢	AquirerTestDevice				
UnBind Terminal V	٢	AquirerTestDevice				
UnBind Terminal V	٢	AquirerTestDevice				
UnBind Terminal V	٢	AquirerTestDev	vice			
UnBind Terminal 🗸	$\bigcirc$	AquirerTestDev	vice			

plane					
A HOME	PAYME	NT GATEWAY	ONL		
Payment Gat	eway E	MV Termin	nals		
Instance Termina	IID	TM	S Terr		
CSV PDF XLS		-			
Actions	1V Termina	CustomerIE	)		
UnBind Terminal 🗸		AquirerTestDevice			
UnBind Terminal 🗸	$\bigcirc$	AquirerTestDev	rice		
UnBind Terminal 🗸	0	AquirerTestDev	vice		
UnBind Terminal 🗸	$\odot$	AquirerTestDev	rice		
UnBind Terminal ¥		AquirarToctDo	ico		

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.

Confirm	×
Are you sure you want to unbind TID '70000364'?	
Click 'Yes' to confirm.	
Yes	

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

SerialNumber	LastBindingDate	LastUnBindingDate	LastUnBindingUser	FirmwareName	LastFirmwareInstallationDate	LastConfigDownloadDate I
		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.1.1.0_210505_1720.	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'.

Instance Terminal ID	TMS Termi	nal ID 00003057 Terminal Se	rial Number		SEARCH							
SV POF XLS								Page 1	of 1 ->> >> 1	00 per page 🗸		
Payment Gateway EMV Termin	als											
Actions	CustomeriD	Location	LocationID	LocationCountry	MACAddress	SerialNumber	LastBindingDate	LastUnBindingDat	LastUnBindingUser	FirmwareName	LastFirmwareInstallationDate	LastConfigDownloadDa
UnBind Terminal V	Richard Test	Richard PAX H2H Test	002053	Ireland			1	2024-01-1116:12:15	PlanetAdmin\rmuller	1.0.5.26_A920Pro.	2023-09-1109:36:34	2024-01-08 14:02:57

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.

Result X	]
Error: This terminal is already unbound	
	_
ОК	
	-

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

# **Openation Deced help?** If you have a technical issue or need support troubleshooting, please check the clevant 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.