



LINQ Pay Portal Overview

Updated 8/5/2024

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Welcome to LINQ Pay!

View and manage transactions within the LINQ ecosystem with your LINQ Pay Portal.

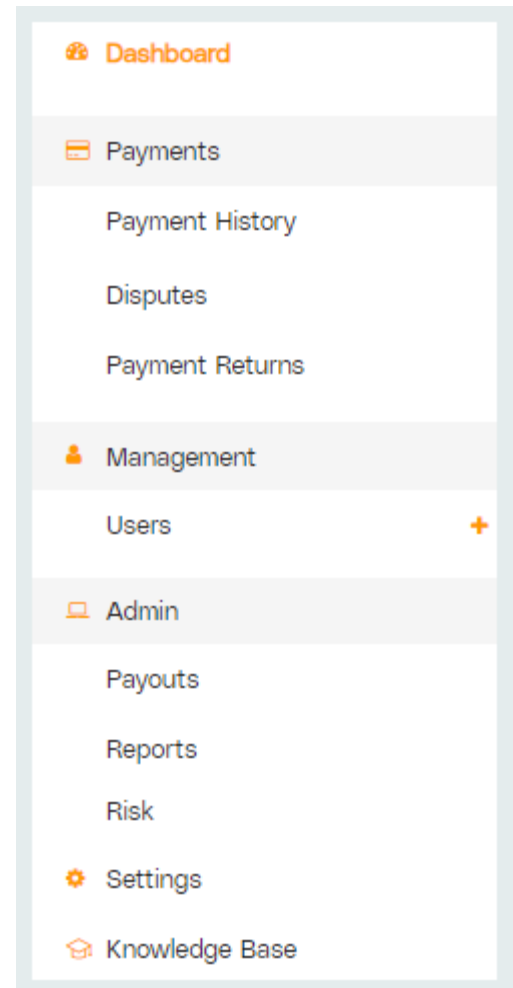
Navigation



Use the top menu banner to manage your LINQ Pay account. Search for specific items, view your messages, keep track of workflow notifications, manage your profile, or log off your current session.

Use the left side menu panel to navigate to different areas within the LINQ Pay Portal.

- **Dashboard:** The landing page for the LINQ Pay Portal. Quickly assess account health and complete basic tasks.
- **Payments:** View and manage transactions.
 - View a detailed **Payment History**.
 - Keep track of any **Disputes**.
 - View **Payment Returns**.
- **Management:** Manage account users.
- **Admin:** Manage account details.
 - Track **Payouts**.
 - Run **Reports**.
- **Settings:** Configure payment, business, and user settings.
- **Knowledge Base:** Access resource guides for workflows in LINQ Pay.



Dashboard

Use the Dashboard to assess the health of your account and perform basic actions.

The dashboard is divided into four main sections:

- Quick Charge:** A form for entering payment details including Amount*, Address, City, State, Zip, Email, Phone, Sale type, and a dropdown for 'Create new payment method'. There is a 'Save Customer Info' checkbox and a 'Process Payment' button.
- Today's Sales:** A bar chart showing sales for the current day, with a total of \$0.00. The x-axis is labeled with 12AM and 12PM.
- Account Balance:** Displays the current account balance as \$625.14, with a link for 'BALANCE DETAILS'.
- Last 3 Payouts:** A section for viewing recent payouts, with a link for 'PAYOUTS'.

- Quick Charge:** Enter payment details and process payment directly from the LINQ Pay Portal.
 Note: Any transaction created in the LINQ Pay portal will not be visible in LINQ Connect or in TITAN LINQ Nutrition.
- Today's Sales:** View a graphical depiction of today's sales.
- Account Balance:** View current Account Balance. Click Balance Details for additional information.
- Last 3 Payouts:** View the three most recent payouts. Click Payouts for details.

The dashboard features two main data visualization components:

- Customer Transactions Graph:** A line chart showing Sales (purple line) and Count (teal line) from June to June. The y-axis represents dollar amounts up to \$600.00. A legend on the left lists Sales, Refunds, Declines, Rejects, and Disputes. A tooltip shows current values: Sales = \$847.59 and Count = 20. The chart shows a significant spike in January.
- Funds Snapshot:** A table showing processing history for a single glance as of 7/2/2024. It includes YTD, MTD, and 07-02-2024 details for Sales, Refunds, Declines, Rejects, and Disputes.

YTD DETAILS		
	TOTAL	COUNT
Sales	\$847.59	20
Refunds	\$222.23	9
Declines	\$121.11	2
Rejects ✓	\$0.00	0
Disputes	\$0.00	0

MTD DETAILS		
	TOTAL	COUNT
Sales	\$0.00	0
Refunds	\$0.00	0
Declines	\$0.00	0
Rejects ✓	\$0.00	0
Disputes	\$0.00	0

07-02-2024		
	TOTAL	COUNT
Sales	\$0.00	0
Refunds	\$0.00	0
Declines	\$0.00	0
Rejects ✓	\$0.00	0
Disputes	\$0.00	0

- Customer Transactions Graph:** View graphical data about **Sales, Refunds, Declines, Rejects, or Disputes.**
- Funds Snapshot:** View a transaction summary for a given date range.



Payments

Manage your transactions from the Payments Menu.

Payment History

The screenshot shows the 'Payment History' dashboard. At the top, there are links for 'Transaction Details Report' and 'Terminal Transactions'. The dashboard is divided into three summary sections: 'Authorizations (Last 30)' with a value of 0, 'Sales (Last 30)' with a value of \$0.00, and 'Refunds (Last 30)' with a value of 0 / \$0.00. Below these are 'Avg. Transaction' (\$0.00), 'Failure Ratios' (Count: 0.00%, Vol: 0.00%), and 'Refund Ratios' (Count: 0.00%, Vol: 0.00%). A navigation bar includes tabs for 'Sales', 'Authorizations', 'Refunds', and 'Failed', along with 'SORT BY TXN ID' and 'Batch Actions' dropdowns. A search bar is on the right. The main table has columns for Amount, Status, Cardholder, Payment, and Created. It lists two transactions: one for \$10.00 with a green status and one for \$111.11 with a red status. Both are VISA 4242 cards from 05-17-2024.

- View detailed information about your payment transactions, sales, and authorizations.
- Click a transaction to view details or generate a receipt.
- Run a **Transactions Details Report** to export transaction details.
- Click **Terminal Transactions** to view transactions associated with linked terminals.

Disputes

The screenshot shows the 'Disputes' dashboard. It features a navigation bar with tabs for 'View All', 'Needs Response', 'In Review', 'Won', and 'Lost'. There are download icons for CSV and XLS, a search bar, and a 'Filters' button. A descriptive text states: 'A chargeback or dispute is a transaction reversal initiated by a cardholder's bank or credit card issuer. It allows a cardholder to dispute a transaction on their payment card statement and request a refund on the disputed amount.' Below is a table with columns for Created On, Status, Respond By, Cardholder, Amount, and Past Due. The table is currently empty. At the bottom right, it shows 'Items per page: 10' and '0 of 0'.

- Keep track of any chargebacks or disputes. Search for or filter results as needed.
- Click an individual dispute entry to view dispute details.



Payment Returns

Home > Payment Returns

Payment Returns

SEARCH (0)

Name	TXN ID	Merchant	Account	Amount	Created	Return Code
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0 of 0 < >

- View payments returned from your customers.



Management

Manage access to your LINQ Pay account with Management.

Users

Users

Select a user account from the list below to view the user's profile

Total Users: 2 Active Users: 2 Inactive Users: 0

SORT BY ID SEARCH (0)

Username	Name	Email	Status	Main Role	Email confirmed	Last Login
richardc	Richard C	[REDACTED]	Active	Merchant	Y	2024-01-24 13:54:45
lsuperintendent	Linq Superintendent	test@test.com	Active	Merchant	Y	

- Manage users associated with your LINQ Pay account.
- Click on a user to view their **User Profile**.
- Create **Access Templates** and **Teams** to set user groups and security roles.



Admin

Manage withdrawals, reports, and settings for your account.

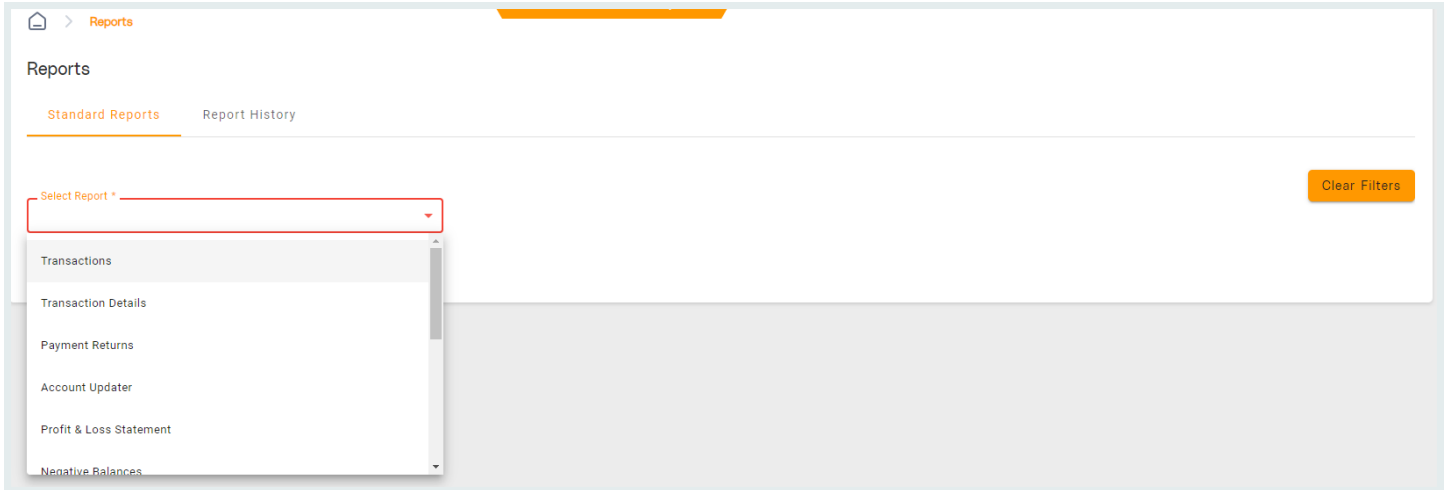
Payouts

The screenshot displays the 'Payouts' admin interface. At the top, there are three summary cards: 'Account Balance' showing \$625.14 with an 'Account Balance' button; 'Payout Schedule' showing 0.00% with a 'View Schedules' button; and 'Next Payout Details' showing \$0.00 with sub-headers for Amount, Date, Account, and Frequency. Below these is a 'Payout History' section with a sub-section for 'Payout Returns'. The history table has columns for Date Created, Account, Status, and Amount, and includes a search bar, a 'Sort By Disbursement ID' dropdown, and a 'Filters' button. The table is currently empty, showing '0 of 0' items.

- **Account Balance:** View your current account balance.
- **Payout Schedule:** View the percentage of the total account balance to be included on the next payout. Click **View Schedules** to manage payout schedules.
- **Next Payout Details:** View details of the next scheduled payout.
- **Payout History:** View all past attempted and completed payouts. Click an entry to view payout details.
- **Payout Returns:** View all completed payout returns.



Reports



- Run reports to help monitor your business. Choose a report to generate from a drop-down list of existing report templates.
- View **Report History** to keep track of historical data.

