

# Wind River Merchant Portal User Guide

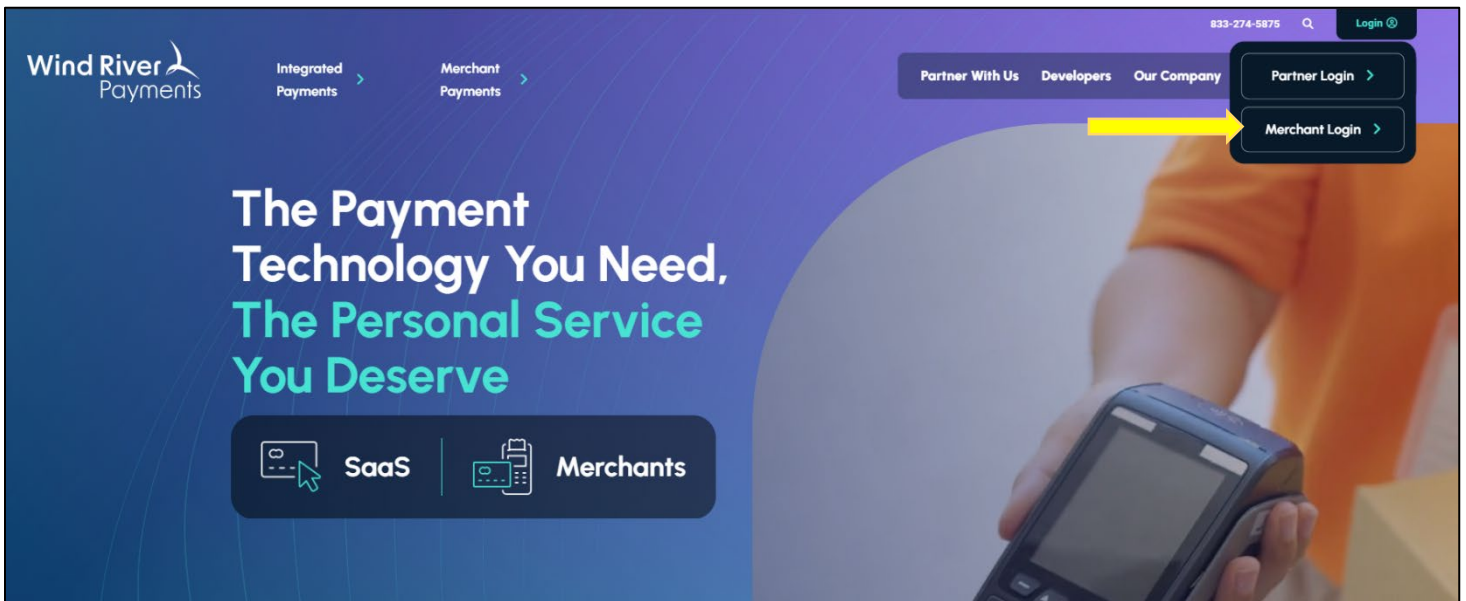
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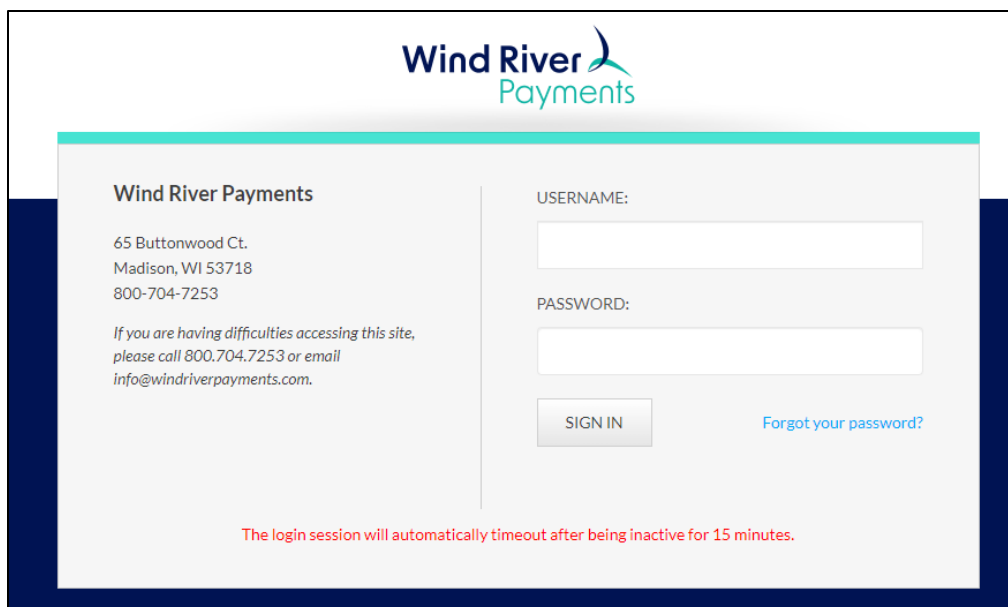
## Wind River Merchant Portal User Guide

### I. Login

To login to your Wind River Merchant Portal account, go to [www.windriverpayments.com](http://www.windriverpayments.com). Hover over the **Login** dropdown and select **Merchant Login**.

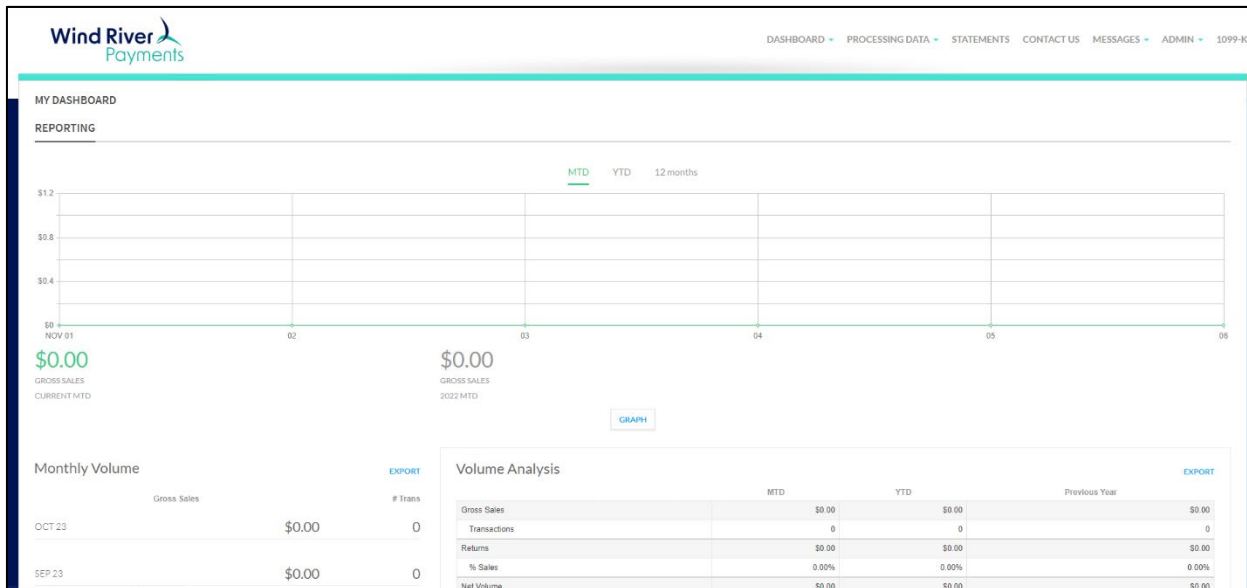


You will then be taken to the Merchant Portal login page where you will be prompted to enter your username and password. If this is your first time logging in to your account, please reference the Welcome Email you received from Wind River with your Username and Password details.

A screenshot of the Wind River Payments Merchant Portal login page. The page features the Wind River Payments logo at the top. On the left, there is contact information for Wind River Payments: 65 Buttonwood Ct., Madison, WI 53718, 800-704-7253. Below this, it says 'If you are having difficulties accessing this site, please call 800.704.7253 or email info@windriverpayments.com.' On the right, there are input fields for 'USERNAME:' and 'PASSWORD:', a 'SIGN IN' button, and a link for 'Forgot your password?'. At the bottom, a red message states 'The login session will automatically timeout after being inactive for 15 minutes.'

## II. Dashboard

After entering your username and password, you will be taken to the **My Dashboard** screen shown below. My Dashboard gives a brief overview of some important reporting metrics including Gross Sales, Monthly Volume, Volume Analysis, and more.

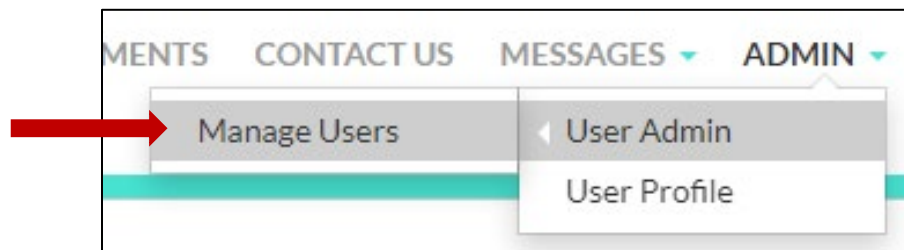


## III. User Maintenance

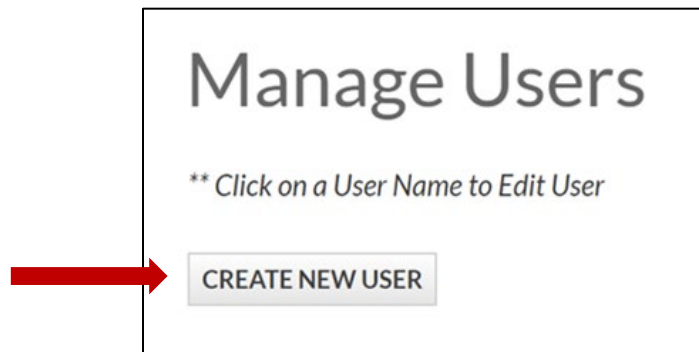
The user maintenance feature provides the Admin User flexibility to manage additional users, including the ability to add users, update profiles, and delete users. There is also the ability to quickly and easily reset passwords that have been locked due to failed login attempts.

### Add a User

1. After logging in to your Merchant Portal, navigate to the user **ADMIN** tab.
2. Under this tab, select **User Admin** then select **Manage Users**.



3. Then click the **Create New User** link on the left side of the screen.

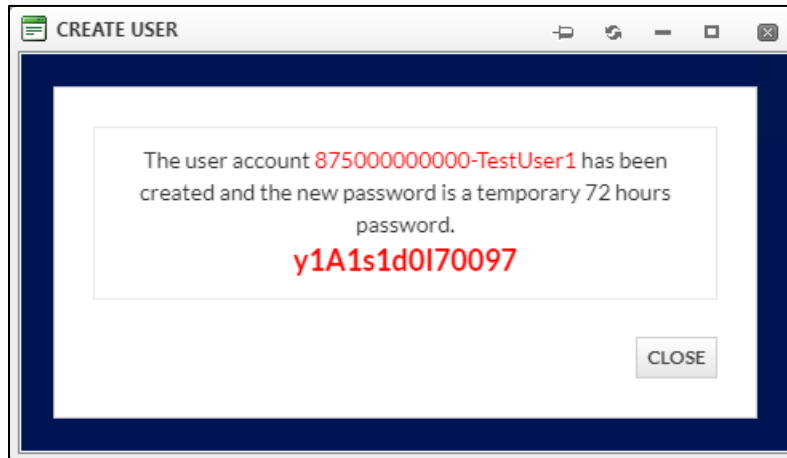


4. **Create New User** box will appear.

- a. Enter a username for the individual user. It must include between 7 to 10 characters after the account number and the dash. The full username includes your merchant ID along with a dash and the characters you entered.
  - ✓ Please remember to include the dash when providing the full username.
- b. Enter first name, last name, and email address in the appropriate fields.
- c. Click **Submit**.

### Create New User

User Name:	875000092783-	<input type="text"/>
<i>User Name must include between 7 and 10 alphanumeric characters after the account number. Typically this will include some combination of first and last name.</i>		
First Name:	<input type="text"/>	
Last Name:	<input type="text"/>	
Email:	<input type="text"/>	
User Role:	Secondary Merchant Users <input type="button" value="v"/>	
1099K Group:	<input type="text"/> <input type="button" value="v"/>	
Status:	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	
<i>After selecting submit, a temporary 72 hours password will be displayed. Please copy or record this temporary 72 hours password and send it in a secure manner to the new user along with the user name. The new user must log on within 72 hours and will be prompted to change the temporary password.</i>		



5. After clicking Submit, a 72-hour temporary password will be displayed on the screen.
  - a. **Please note:** This system does **NOT** automatically send an email notifying the user of their credentials. You will need to provide the user with this information in a secure manner.
  - b. To record the username and temporary password, use the “pin” icon to copy this information, or manually highlight and copy the information to paste and share with the user.
  - c. For security reasons, this password will not be displayed or retrievable once this pop-up box is closed. Notify the user to login within 72 hours so they can change their temporary password.

**Note:** If the user does not log in within the 72-hour time frame, please follow instructions to reset the user’s password.
6. Click **Close** when complete.
  - a. The full username is now displayed in the user list.

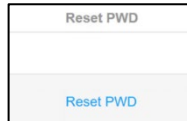
**Note:** Username includes the full Merchant ID number, the hyphen and the name you created for the user.

## IV. Reset a User

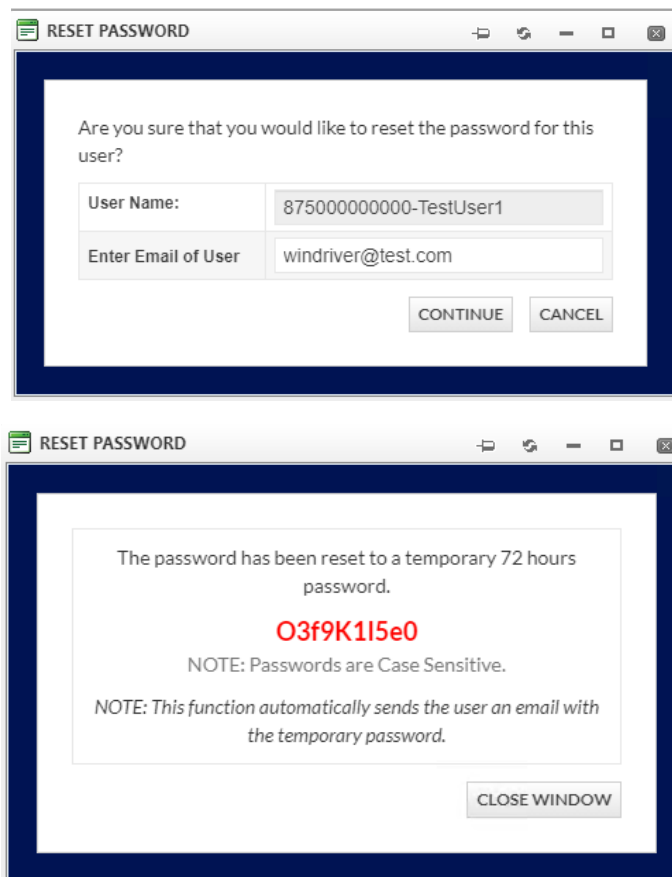
Should a new user not login within the required 72 hours, forget their password, or become locked due to multiple failed login attempts, you can simply reset the password.

To reset your password:

1. Click the **Reset Password (Reset PWD)** link from the **Manage Users** screen.



2. A **Reset Password** pop up will appear.
3. Verify the user's email address and select **Continue**.



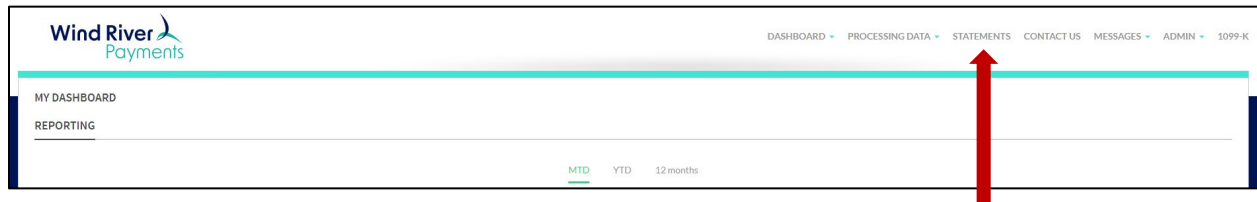
**Please note:** The password reset function automatically sends the user an email with their new password.



## VI. Viewing Statements

By the second of each month, your statement for the previous month will post. The statement will provide a line-by-line breakdown of your fees, deposits, adjustments, and chargebacks.

1. Click the **Statements** tab.



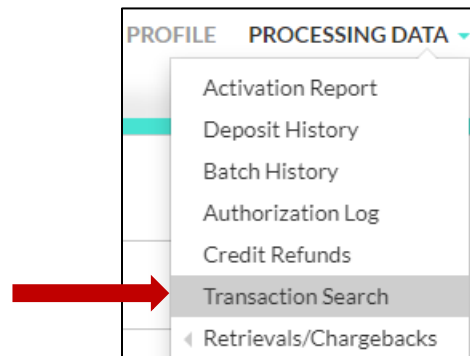
2. Click the down arrow and choose which statement you want, then click **View Statement**.



## VII. Transaction Search

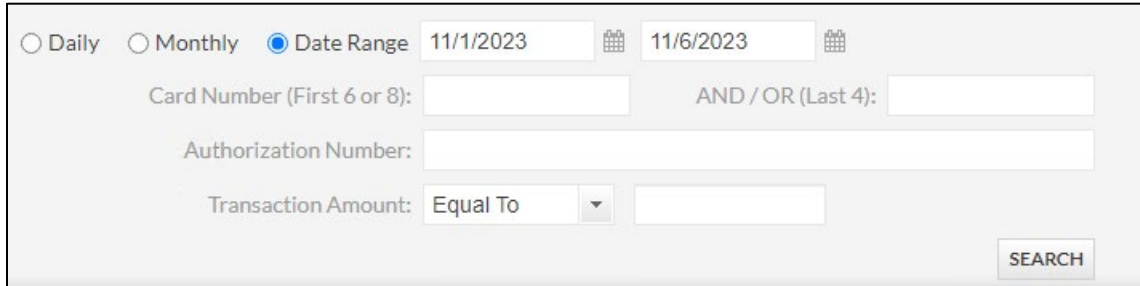
This will allow you to look for a specific transaction if you have the following information: **Card Number (first six digits), Card Number (last four digits), Authorization Number, Transaction Amount.**

1. Hover over the **Processing Data Tab** and choose **Transaction Search**.





2. Indicate the date range for the transaction and input the information you have into the corresponding boxes and click **Search**.



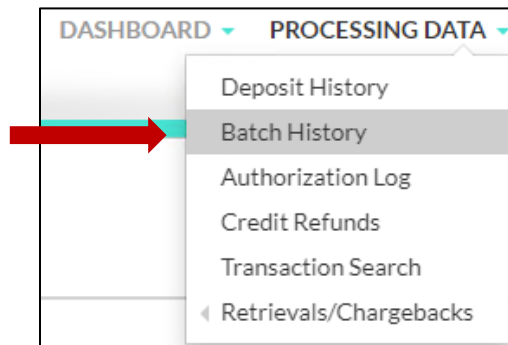
Daily    Monthly    Date Range   11/1/2023   11/6/2023  
 Card Number (First 6 or 8):    AND / OR (Last 4):   
 Authorization Number:   
 Transaction Amount: Equal To

**SEARCH**

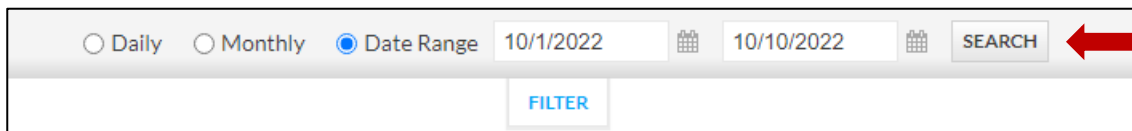
## VIII. Review Batch History

Batch history allows you to look at the details of a specific batch.

1. Hover over **Processing Data** and choose **Batch History**.



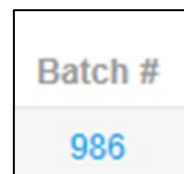
2. Choose the Daily, Monthly or Date Range and input the needed dates, then click **Search**.



Daily    Monthly    Date Range   10/1/2022   10/10/2022   **SEARCH**  
 FILTER

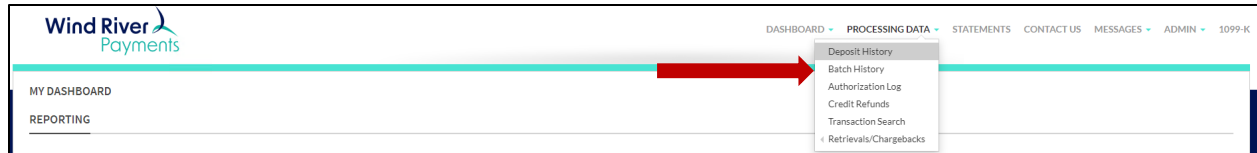
3. Under **Batch Summary** you can click on the blue batch number. This will open a batch detail window where you can look at the specific transactions within the batch.

**Please note:** The report date is always one day after the batch settled.



## IX. Review Deposit History

1. Hover over the Processing Data tab and click **Deposit History**.
2. This will show the Deposit History for the past 18 months.



If you have any additional questions, please reach out directly to your dedicated Relationship Manager or call 608-243-3264.