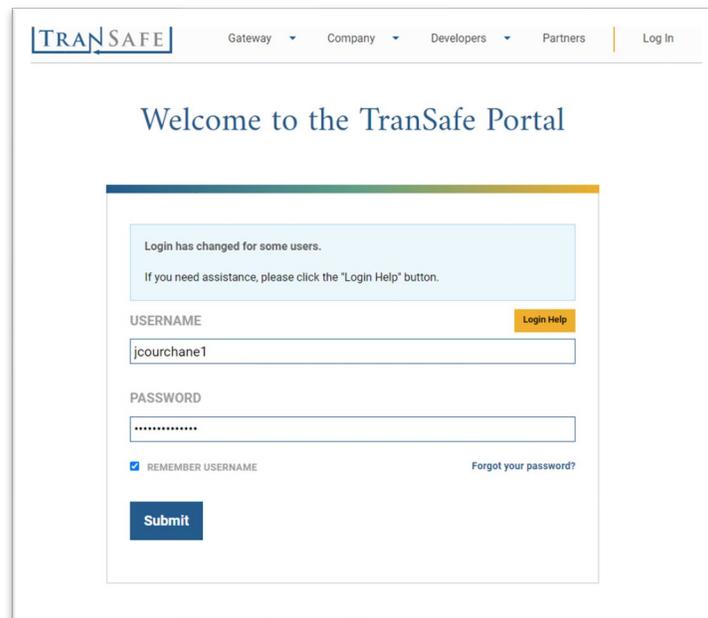


# TranSafe User Guide

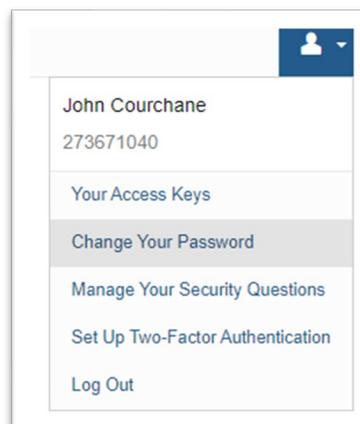
## Logging in and Changing Your Password

Log into your TranSafe portal (<https://portal.transafe.com/>) with the username and password provided by your system administrator or Wind River representative.



The screenshot shows the TranSafe login page. At the top, there is a navigation bar with the 'TRANSAFE' logo and links for Gateway, Company, Developers, Partners, and Log In. The main heading is 'Welcome to the TranSafe Portal'. Below this, there is a message box stating 'Login has changed for some users. If you need assistance, please click the "Login Help" button.' The login form includes fields for USERNAME (containing 'jcourchane1') and PASSWORD (masked with dots). There is a 'Login Help' button next to the username field, a 'REMEMBER USERNAME' checkbox, and a 'Forgot your password?' link. A 'Submit' button is at the bottom of the form.

In the upper right corner, hover over the user icon and select **Change Your Password**.



The screenshot shows a user profile dropdown menu. At the top right, there is a user icon. The dropdown menu lists the following options: 'John Courchane' (with ID '273671040'), 'Your Access Keys', 'Change Your Password' (highlighted), 'Manage Your Security Questions', 'Set Up Two-Factor Authentication', and 'Log Out'.

Fill out the required fields and click **Submit**. You may be prompted to select security questions if this is your first time logging in.

## Viewing Reports

From your dashboard, hover over **Reports**. There are two primary types of reports: **Transactions** and **Batches**.

- For all report types, you can click **Advanced Options** on the top of the screen to assign parameters.
- Once you have your parameters set, click the **Filter** button in the lower left.

Split Card View
Export to CSV

Advanced Options

Date/Time

Date Range

Past 180 days

Parameters

Batch None Specified	Route	User	Order Number
CustRef/PO #	TTID	Clerk ID	Station ID
Show Voids No	Reversible - Select -		

Comments

Filter By Card Type

<input type="checkbox"/> VISA	<input type="checkbox"/> MC	<input type="checkbox"/> AMEX
<input type="checkbox"/> DISC	<input type="checkbox"/> DINERS	<input type="checkbox"/> JCB
<input type="checkbox"/> VISADEBIT	<input type="checkbox"/> MCDEBIT	<input type="checkbox"/> OTHERDEBIT
<input type="checkbox"/> EBT	<input type="checkbox"/> CUP	

Select All   Deselect All

Filter By Transaction Type

<input type="checkbox"/> SALE	<input type="checkbox"/> SETTLE	<input type="checkbox"/> PREAUTH
<input type="checkbox"/> FORCE	<input type="checkbox"/> PREAUTHCOMPLETE	<input type="checkbox"/> REVERSAL
<input type="checkbox"/> REFUND	<input type="checkbox"/> TIP	<input type="checkbox"/> EBTCBALANCE
<input type="checkbox"/> EBTCBCASH	<input type="checkbox"/> EBTCBSALE	<input type="checkbox"/> EBTFSBALANCE
<input type="checkbox"/> EBTFSRETURN	<input type="checkbox"/> EBTFS SALE	<input type="checkbox"/> EBTFSVOUCHER

Select All   Deselect All

Filter

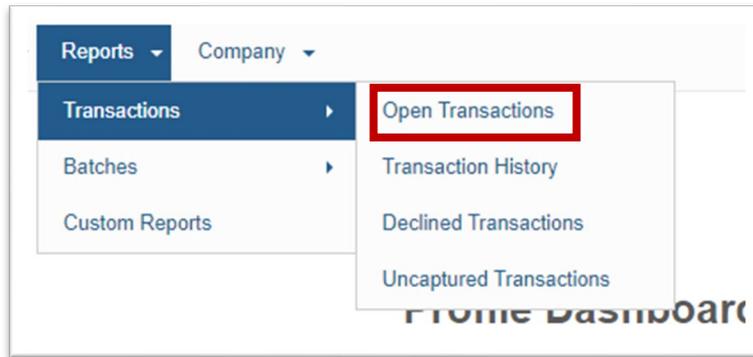
Save as Custom Report

Reset Options

65 Buttonwood Court | Madison, WI 53718 | 608-243-3264 | windriverpayments.com

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## Transaction Reports



**Open Transactions** will show unsettled transactions.

Actions	Payment	Amount	Tax	Timestamp	Name	AVS	CV	Auth Num	TTID
☰	xx1309	130.29	9.65	2/7/2023 09:43	HANEHAN/KURT	UNKNOWN		09956Q	303756612458932
☰	xx2239	192.40	14.25	2/7/2023 09:09		STREET		553646	303754572854323
☰	xx1005	31.56	2.34	2/7/2023 08:42	MCCORMICK/IAN C	UNKNOWN		842444	303752946596320
☰	xx2596	65.42	4.85	2/7/2023 08:23	GIARDINI/GENE F	UNKNOWN		00791P	303751828134035

Transaction History will show **Settled Transactions** as well as **Batch Totals**.

- Please note: TranSafe only stores transaction history for up to 180 days.

If you need to maintain a longer transaction history for reporting purposes, use the **Export to CSV** option to download transaction data for future reference.

Actions	Payment	Amount	Tax	Timestamp	Name	AVS	CV	Auth Num	TTID
☰	xx1329	-0.10		12/6/2022 14:03	Dave Faliski				233972208514999
☰		✓ 0.10		12/6/2022 14:03					233972187471748
☰	xx1329	0.10		12/6/2022 14:02	Dave Faliski	GOOD		07509B	233972170954312
☰	xx1329	-0.11		11/30/2022 13:58	Dave Faliski				233371913637406
☰		✓ 0.01		11/30/2022 13:57					233371856991070
☰	xx1329	-0.10	0.00	11/30/2022 13:57	Dave Faliski				233371824341082
☰	xx1329	0.11		11/30/2022 13:56	Dave Faliski	GOOD		08809B	233371787992343

**Declined Transactions** will show transactions that have been declined either by the gateway or the issuing bank.

Actions	Payment	Amount	Verbiage	Timestamp	AVS	CV	MSoft Code
☰	xx1329	-1.00	INELIGIBLE TRANSACTION REFERENCED	12/9/2022 09:58			DATA_INVALIDMOD
☰	xx8888	-1.05	refund total exceeds limit. Original amount: 1.00, Prior refunds: 0.00, Request amount: 1.05	11/28/2022 10:20			DATA_INVALIDMOD
☰	xx8888	-1.45	INELIGIBLE TRANSACTION REFERENCED	9/29/2022 15:09			DATA_INVALIDMOD
☰	xx8888	-1.45	INELIGIBLE TRANSACTION REFERENCED	9/28/2022 13:59			DATA_INVALIDMOD
☰	—	1.00	P2PE DUKPT BDK not found for KSN FFFF0301013386A00004	8/23/2022 16:21			DATA_BADTRANS

## Batch Reports

Reports ▾
SkyLink ▾
Company ▾
Customers

Transactions ▶

Batches ▶

Custom Reports

Open Batches

Settled Batches

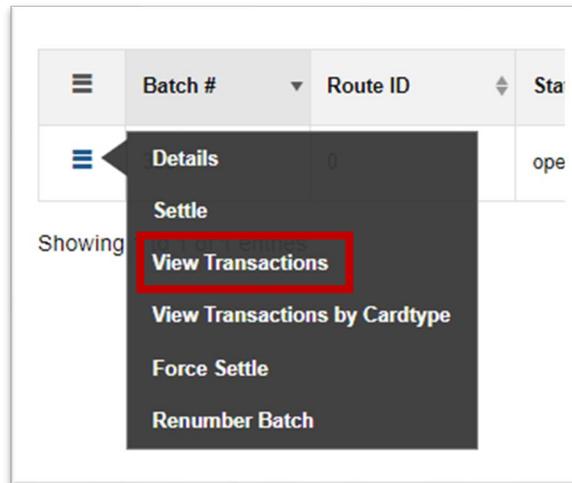
**Open Batches** will show the totals of your open batch.

☰	Batch #	Route ID	Status	Total Trans #	Total Trans \$	Total Return #	Total Return \$
☰	338	0	open	24	2709.17	0	0.00

Showing 1 to 1 of 1 entries Previous **1** Next

To view the transactions within a batch, click the three action lines to the left and select **View Transactions**.

This will take you to the **Unsettled Transaction Report** for a specific batch.



Settled Batches will show the totals off all settled batches dating back to 180 days.

	Batch #	Date/Time	Route ID	Total Trans #	Total Trans \$	Total Return #	Total Return \$
	337	2/16/2023 22:53	0	5	622.67	0	0.00
	336	2/15/2023 22:53	0	6	179.54	1	99.90
	335	2/14/2023 22:53	0	10	422.56	3	263.37
	334	2/13/2023 22:53	0	9	682.06	1	52.46
	333	2/12/2023 22:53	0	6	818.15	0	0.00
	332	2/11/2023 22:53	0	19	1970.15	0	0.00
	331	2/10/2023 22:53	0	11	1110.83	1	88.69
	330	2/9/2023 22:53	0	9	564.96	1	78.13