2022 TapPay Portal User Manual

TapPay

2021.09.13 Updated

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1. Preface

Welcome to use TapPay Portal!

You can add merchants, view your transaction history, and check monthly billing from the website.

There are many more functions that are still under development!

If you have any questions or suggestions during the operation process, please do not hesitate to contact us at support@cherri.tech

Wish you a pleasant journey!

2. Function List

Name	Description and Application
Login Account (Login Email)	◆ Two-factor authentication settings ◆ Change password
Account Activate	◆ TayPay Account ◆ Apple Pay on the Web Merchant Application
Dashboard	◆ Show the enhancements and the updated list of TapPay SDK / Backend API / Portal
Account Information	◆ Edit company information
People	◆ Manage user accounts and configure backend permissions for each account.
Payment Method	◆ Support Apple Pay / Google Pay / Samsung Pay. ◆ Add new merchants for each payment and set the related information.
Link Pay	◆ Create orders and generate payment links
Merchant	◆ Merchant Settings: Add/ edit/ delete acquirer accounts ◆ MGID Settings: Manage MGID
Transaction	◆ Enquire transaction status and related information, and export transaction records for reconciliation purpose
Billing	◆ Show total monthly transactions and amount, and calculate the total amount of TapPay service fee for that month automatically.
Affiliate Code	◆ Set and manage Affiliate Code
Developer	◆ Application settings ◆ System environment (IP) settings ◆ Frontend kit demo
Issue Report	◆ Can send an email to TapPay's consumer service directly from here to report any issues you encountered.
Log Out Backend	◆ Log out of the backend

3. Function Introduction

The introduction and operation of the TapPay backend functions will help you operate the backend more efficiently and clearly. It will use scenarios to help you get started quickly.

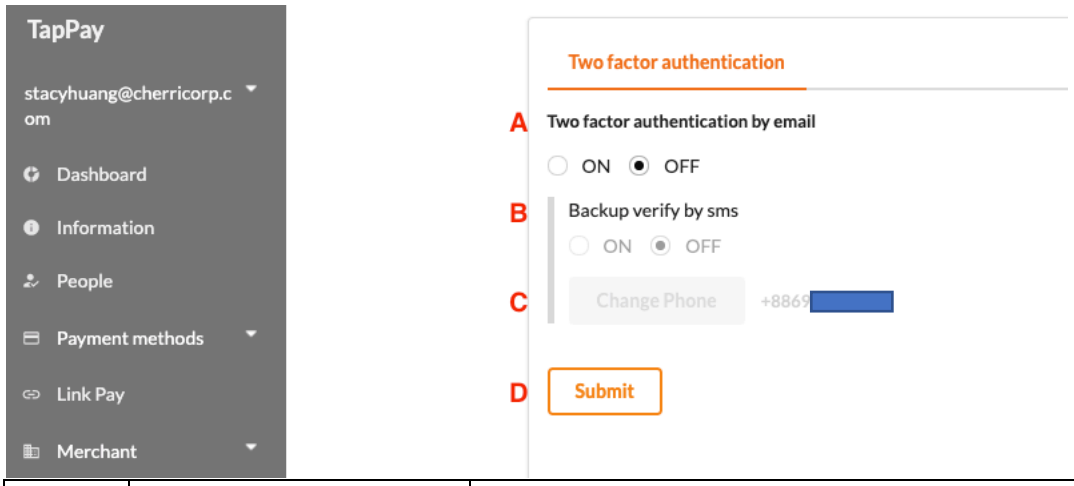
3.1. Login Account > two-factor settings

3.1.1. Function Description

For the security of your account, we recommend that you enable the two-factor authentication function and send the verification code to your email address to verify before logging into the TapPay backend. Please add a backup mechanism (SMS verification). If the mailbox does not receive the verification code or the mail verification is incorrect five times, you can switch to SMS verification to log in.

*The account will be locked out immediately when the maximum number of failed attempts is reached. Please wait 24 hours and try again, or contact TapPay Customer Service during business hours to unlock the account.

3.1.2. UI Demo

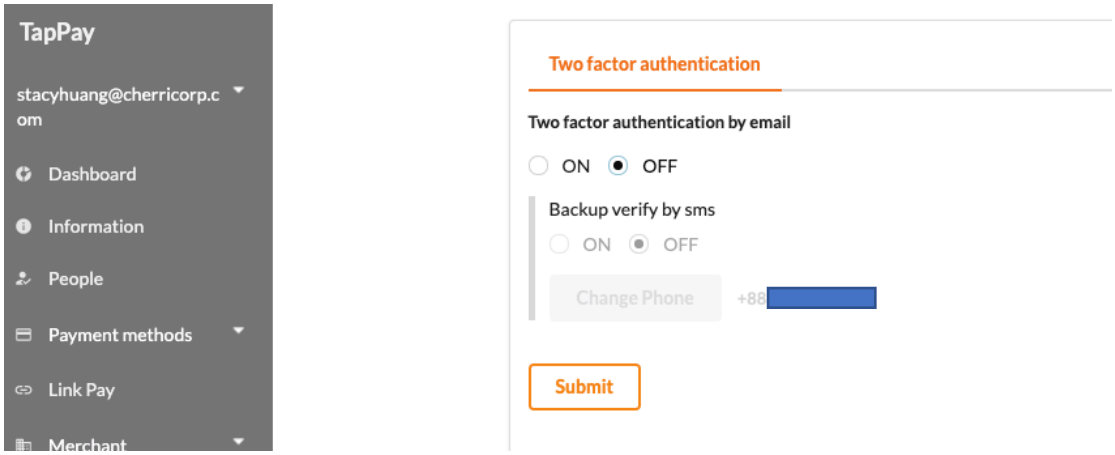


No.	Function	Description
A	two factor authentication	Click to turn on or off
B	backup verify by SMS	Click to turn on or off
C	change phone	Click to edit phone number
D	submit	Click to save the changes

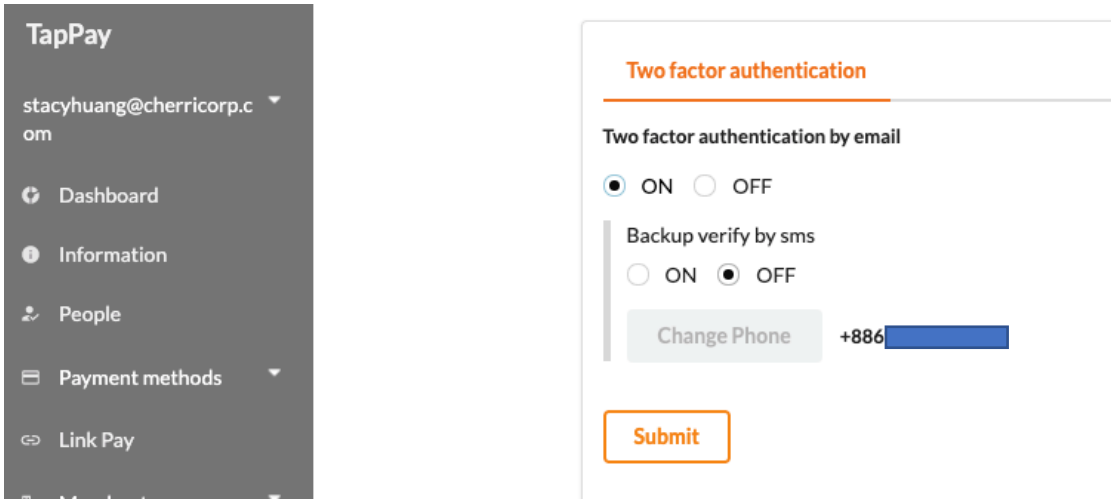
3.1.3. Operating Instruction

3.1.3.1. How to turn on two-factor authentication?

- Click on your login account > Two-factor authentication settings



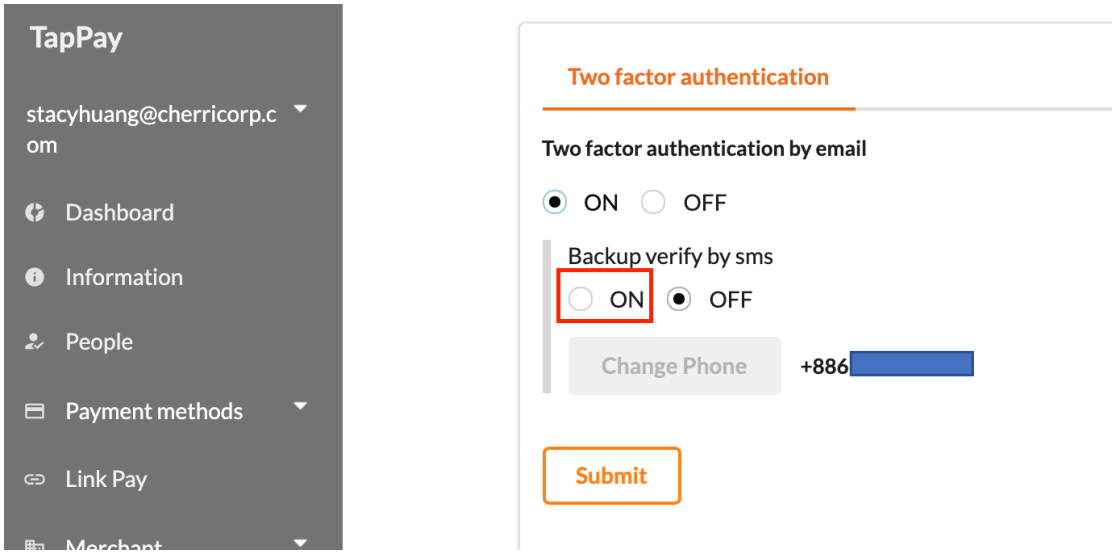
- Go to [Setting for Two Factor Login] > Click [ON] > Click [Submit] to complete the change



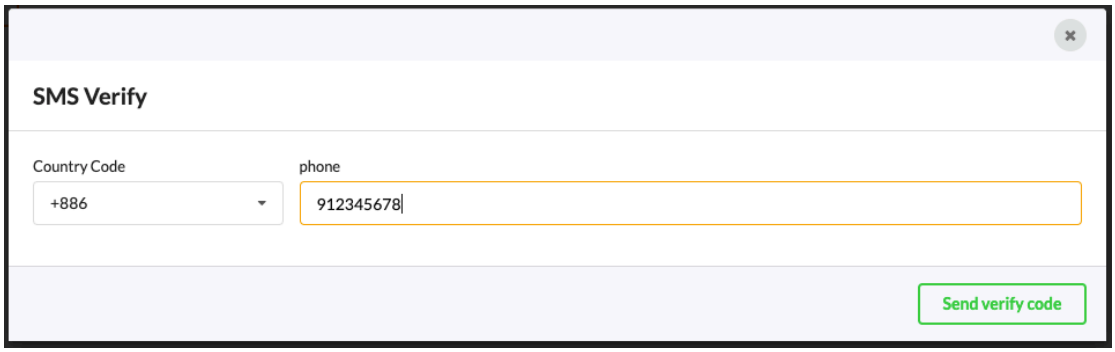
3.1.3.2. How to add backup authentication?

*The two-factor authentication mechanism must be on before the backup authentication can be turned on.

- Go to [Backup authentication] > Click [ON]

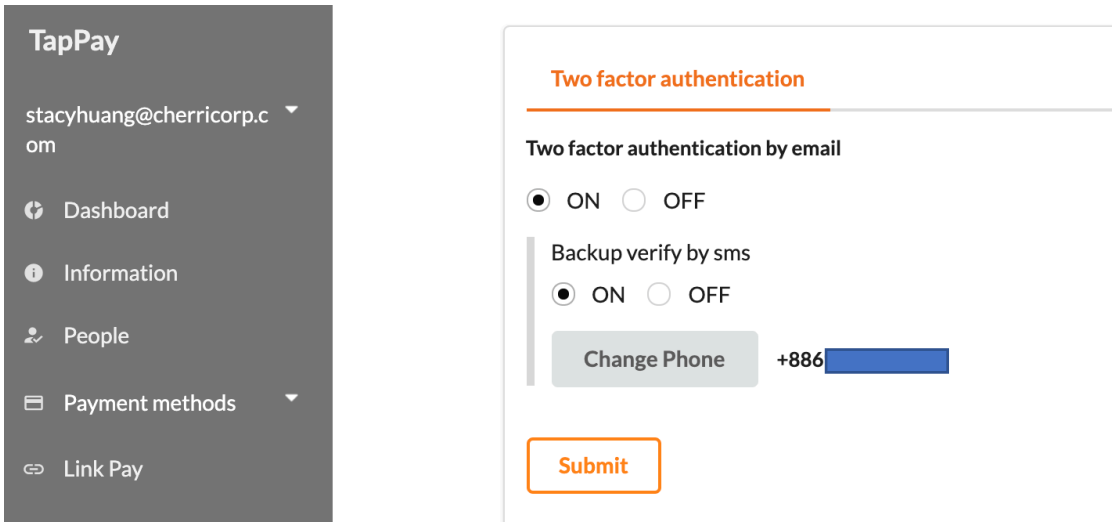


- Select a country code and enter a phone number > Click [Send Verification Code].



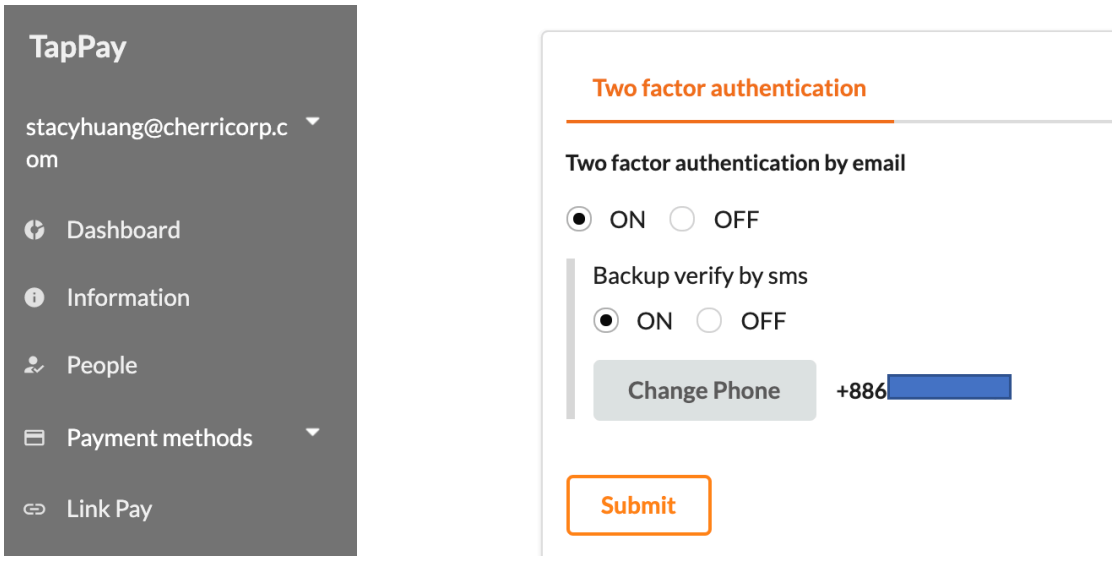
- Enter the verification code and click [Submit]

- Once the setting is successful, you will be able to receive authentication code via SMS as a backup.

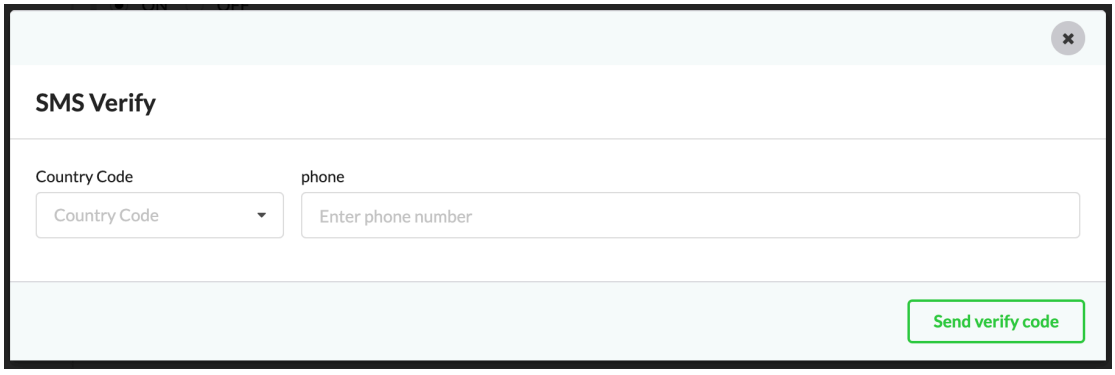


3.1.3.3. How to change the phone number for verification?

- Click [Change Phone]

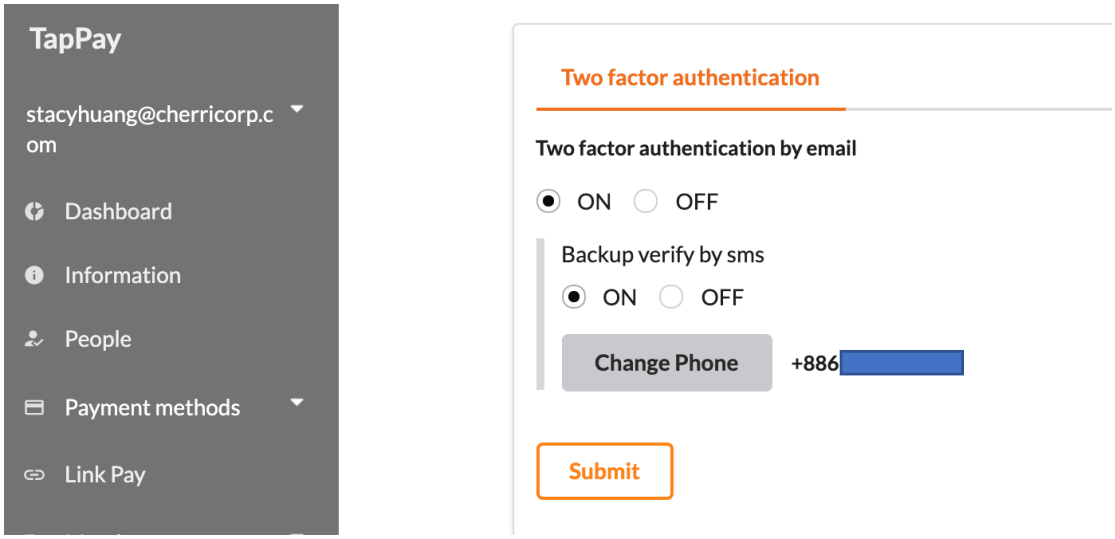


- Enter the new phone number



- Enter the verification code

- Once the verification is complete, the phone number is updated

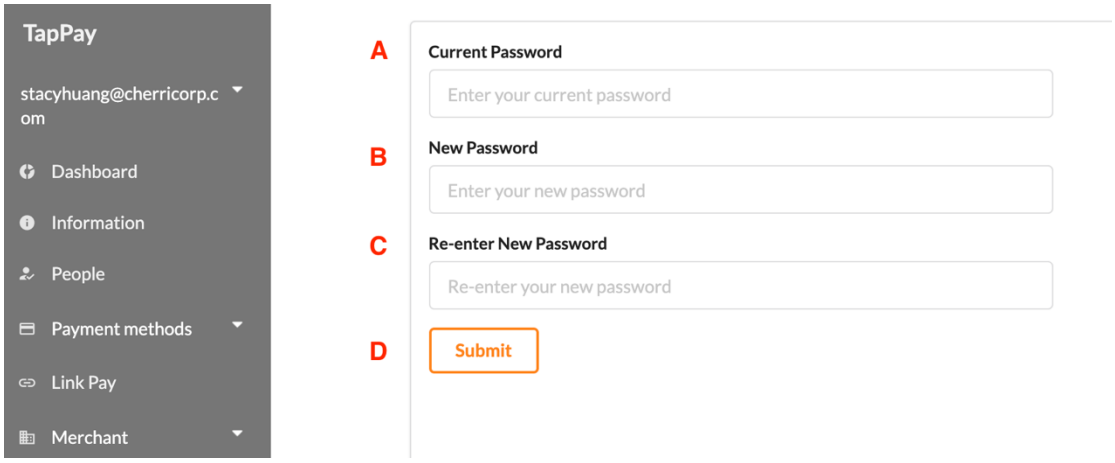


3.2. Login Account > Change Password

3.2.1. Function Description

If you need to change your password, you can do it on this page. When it is done, you can immediately log in with your new password.

3.2.2. UI Demo

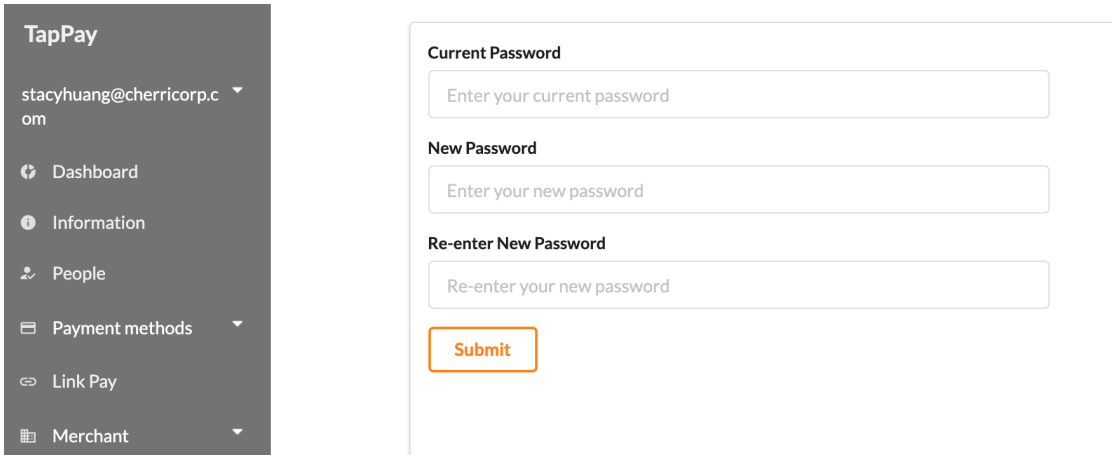


No.	Function	Description
A	Current Password	Enter your current password
B	New password	Enter your new password
C	Re-enter your new password	Re-enter your new password
D	submit	Save the changes

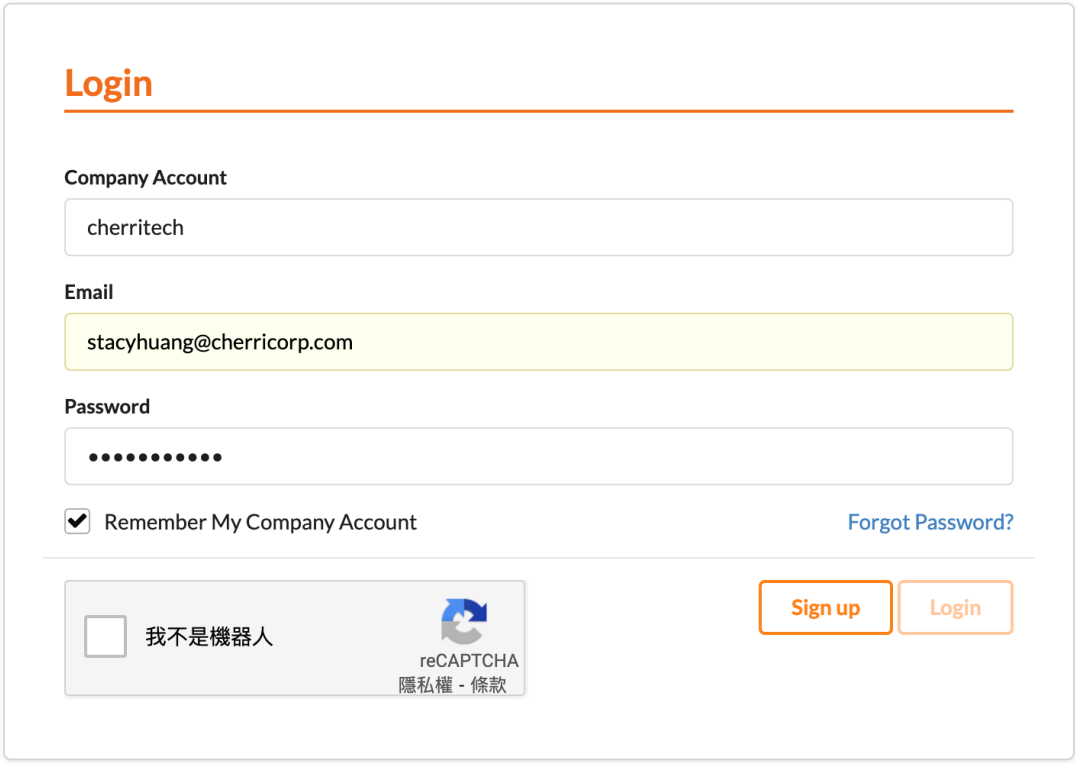
3.2.3. Operating Instruction

3.2.3.1. How to change a user's password?

- When you want to change the password, you can go to Login Account> Change Password to change



- When the new password is set, you can immediately log in with the new one.

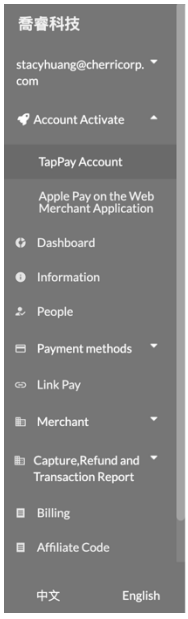


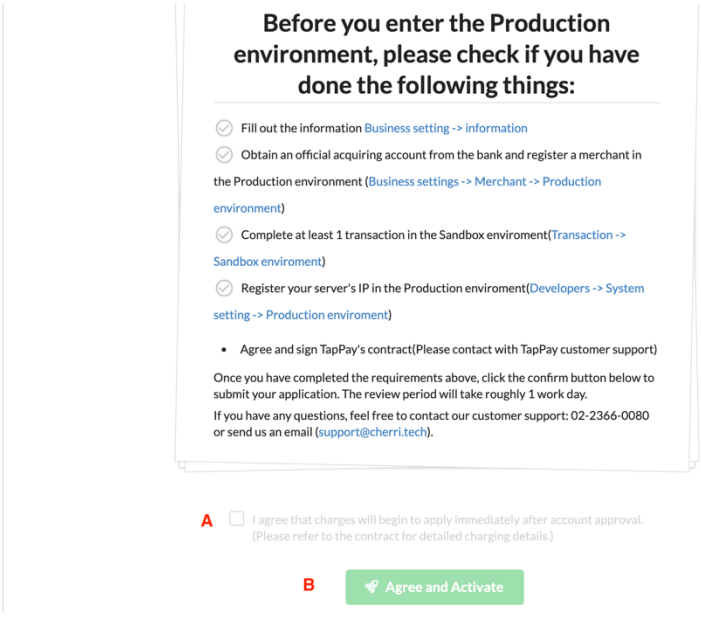
3.3. Account Activate > TayPay Account

3.3.1. Function Description

If you want to activate TayPay account, please complete the 4 steps shown in the image. After the form is submitted, please contact our Support Team via email or phone. We will review your application in 1 day. If your TapPay account is activated, [Account Activate > TapPay Account] will be hidden in the menu.

3.3.2. UI Demo

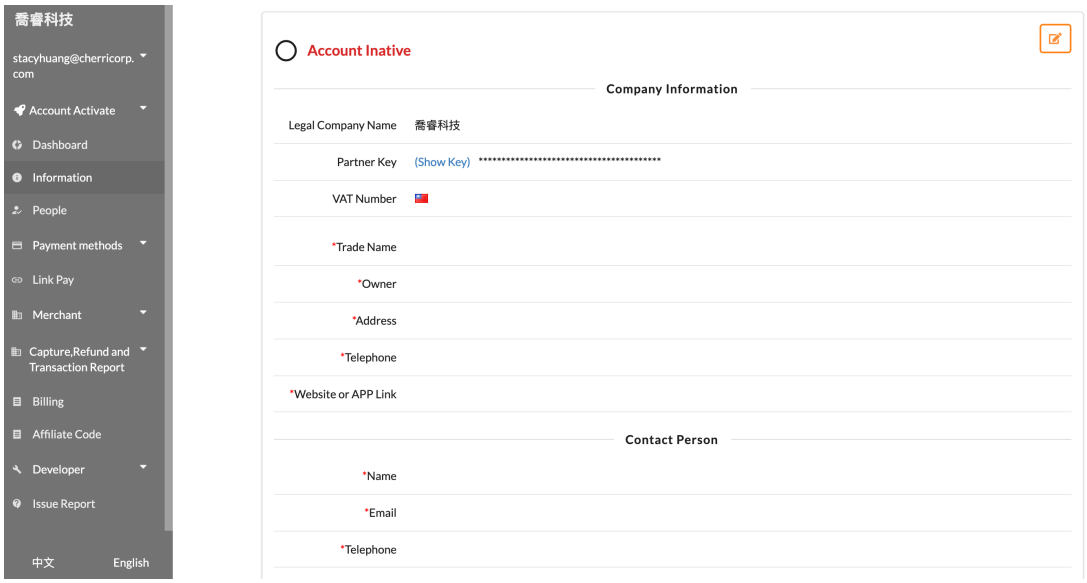




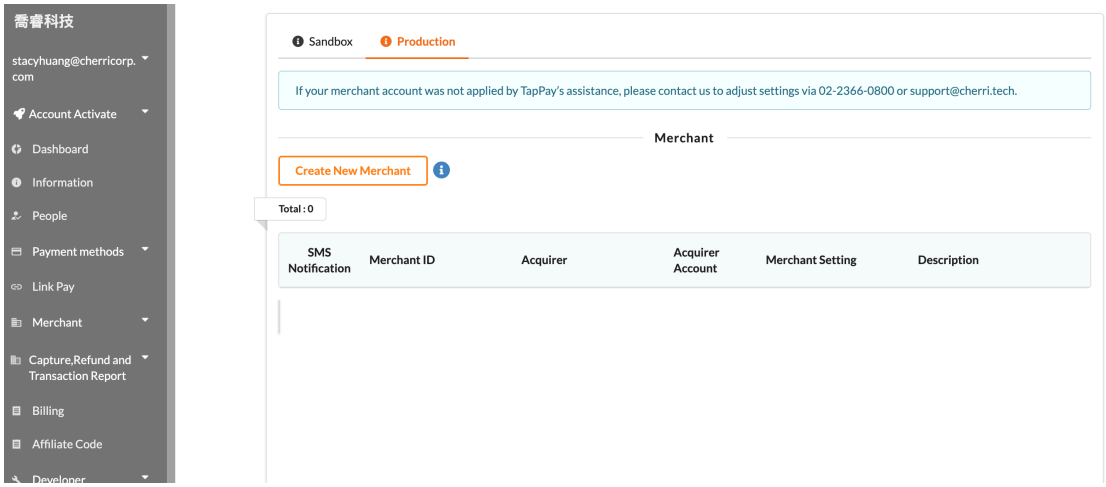
No.	Function	Description
A	Agreement confirmation	Check to agree to the contract
B	Agree and Activate	Check to activate TapPay account. You will be charged once you activate. 選

3.3.3. Operating Instruction

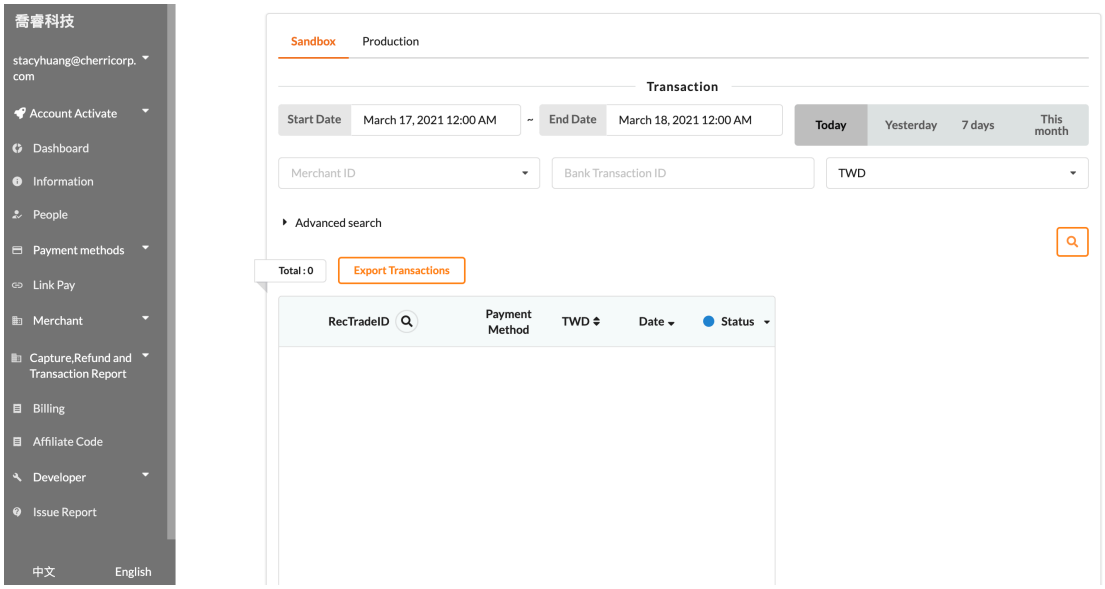
- Step1：Fill in account information below.



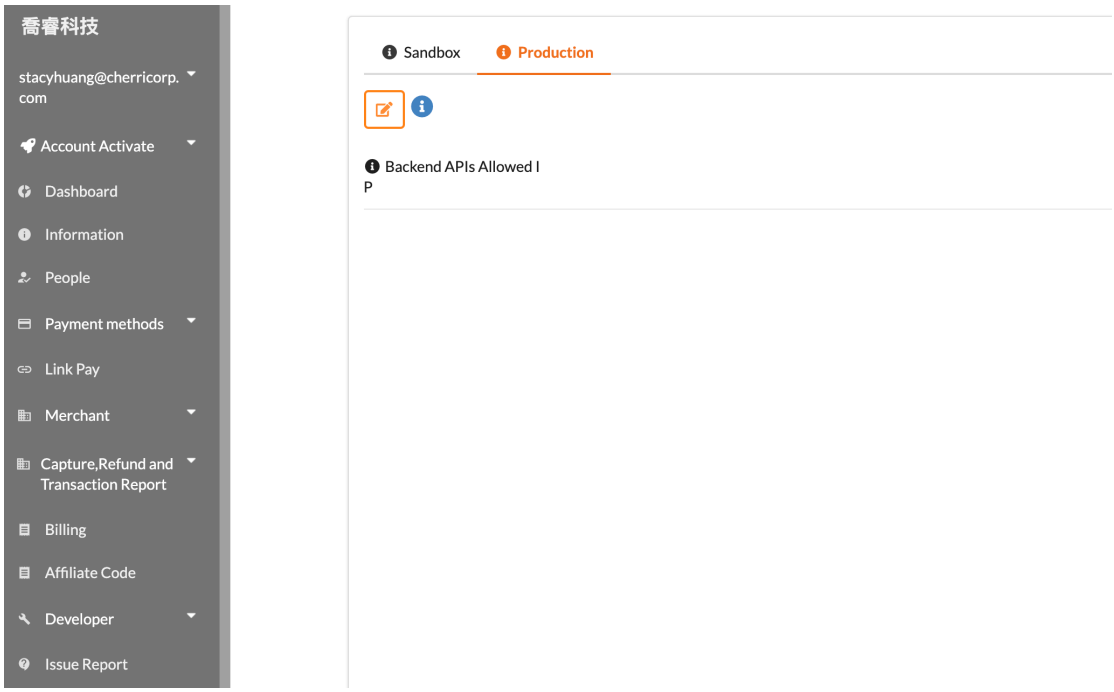
- Step2：Go to [Merchant] and add an Acquirer Account in the production environment.



- Step3：Conduct a transaction in the sandbox environment, and check it in the list below.



- Step4：Register your server's IP it the production environment.

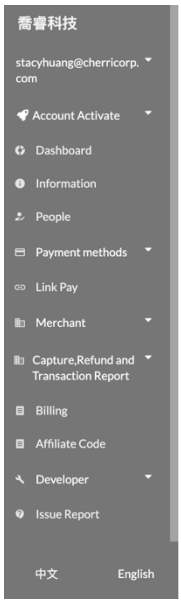


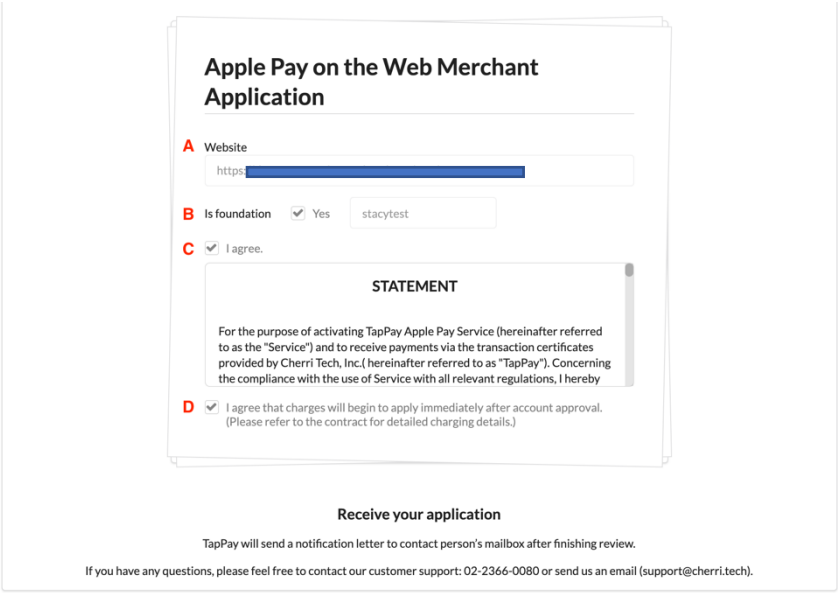
3.4. Account Activate > Apple Pay on the Web Merchant Application

3.4.1. Function Description

If you only need the web version of Apple Pay, you can spare the effort to register your account on Apple Pay Developer. Instead, you can directly activate your Apple Pay Account here on our portal (acquire Apple Pay Merchant Identifier). After we approve your application, you can enjoy the service in the production environment. Once it is activated, we will start charging from you, and you won't see [Account Activate > Apple Pay on the Web Merchant Application] in the menu.

3.4.2. UI Demo



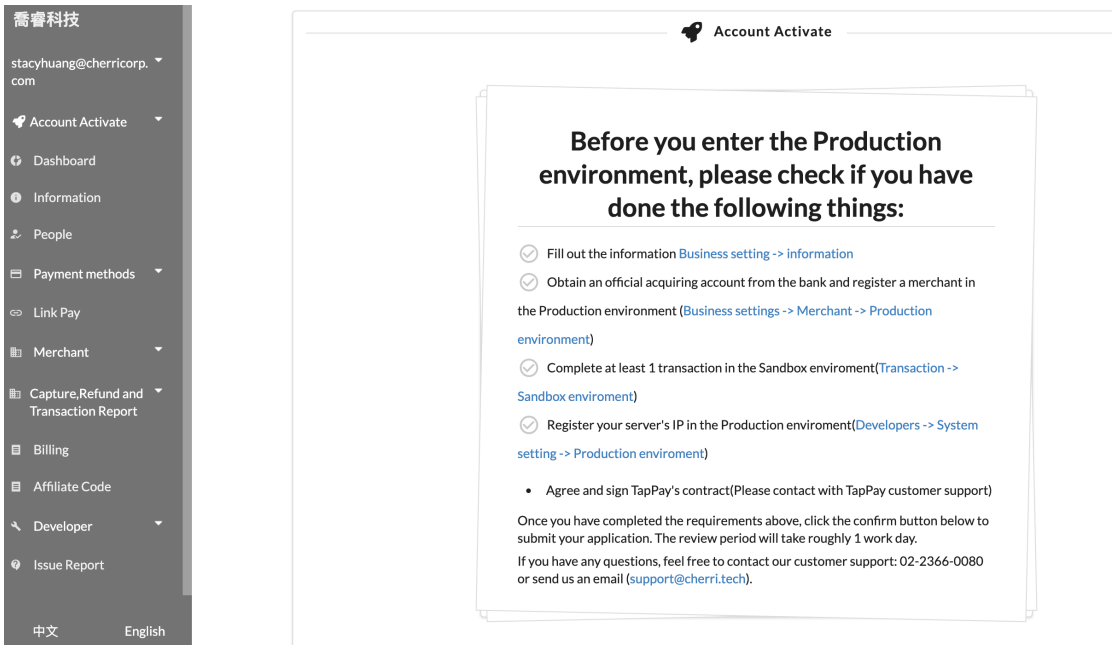


No.	Function	Description
A	Website	Fill in website url
B	Is your merchant a foundation?	If yes, please also enter the foundation no.
C	Agreement confirmation	Check to agree to the statement
D	Agree to be charged after receiving approval.	Check to agree that once your submission is approved, we will charge the fees.

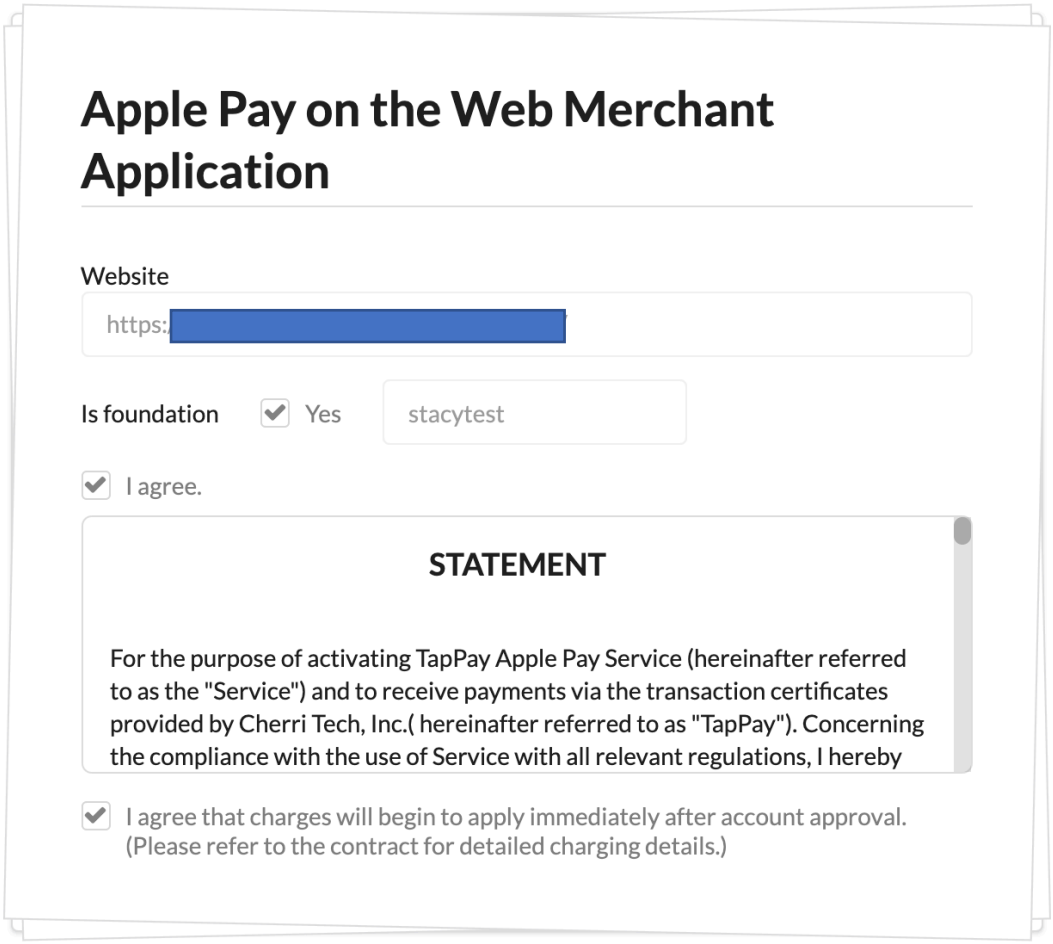
3.4.3. Operating Instruction

3.4.3.1. How to register Apple Pay on the Web?

- Please activate your TapPay account first.



- Please go to [Apple Pay on the Web Merchant Application] and fill in all required information and submit your application. After TapPay has approved, you can start to use the service.



3.5. DashBoard

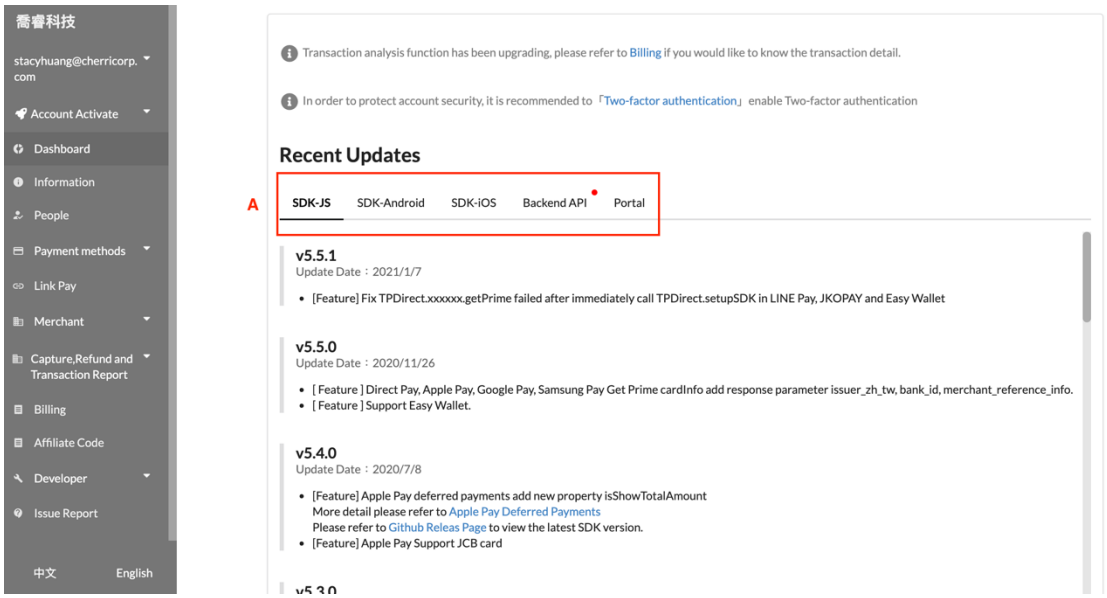
3.5.1. Function Description

You can see clearly what new features and enhancements TapPay has implemented in DashBoard.

It includes the following list:

- SDK (including JS, Android, iOS) updates and enhancements
- Backend API updates and enhancements
- Interface updates and enhancements

3.5.2. UI Demo

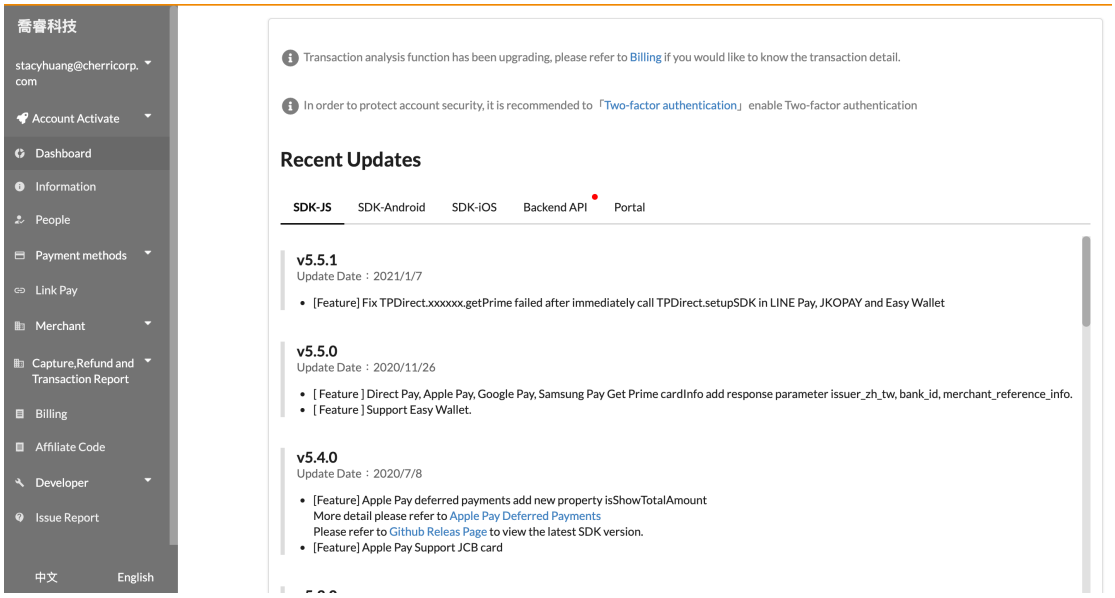


No.	Function	Description
A	Recent Updates	SDK/Backend/Portal updating records

3.5.3. Operating Instruction

3.5.3.1. Where to see the latest updates for our system?

- Please go to [Dashboard] to see all the updated information.



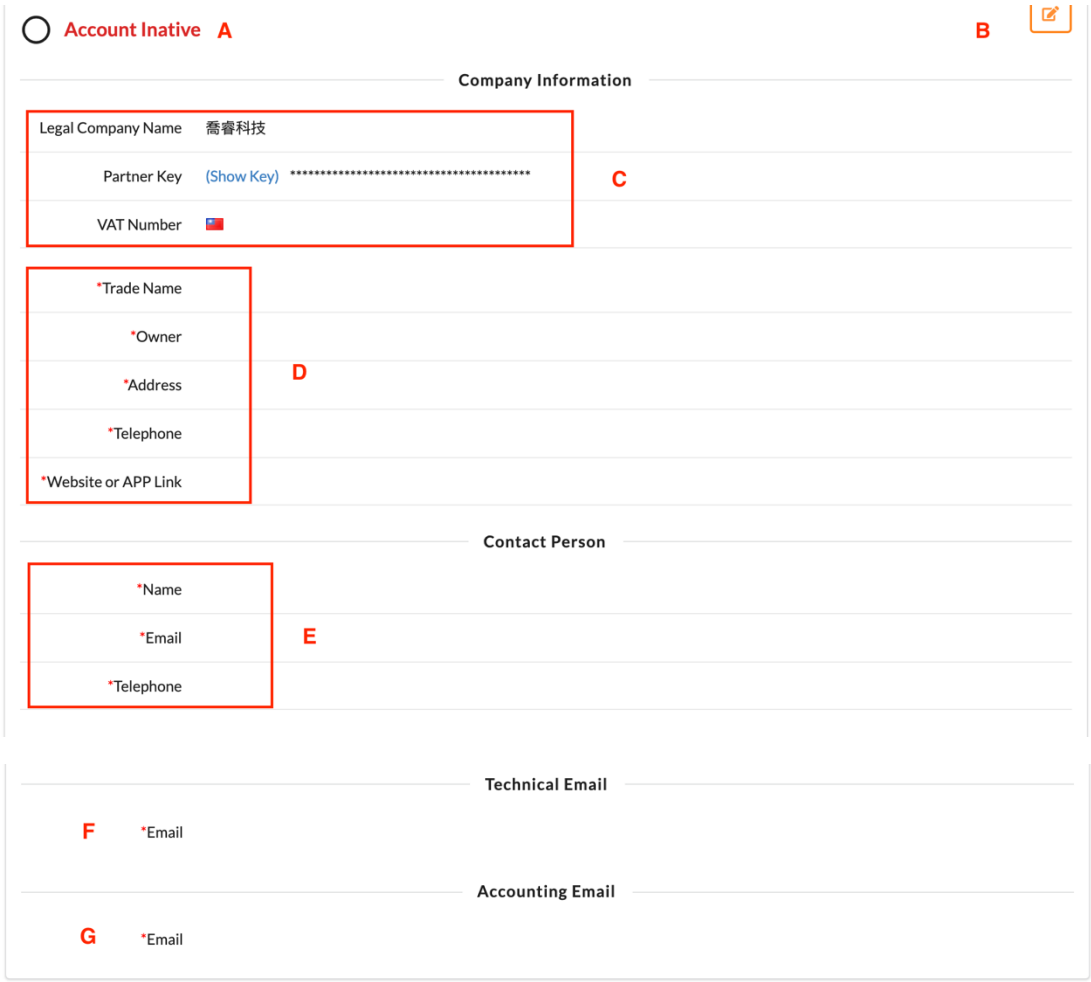
3.6. Information

3.6.1. Function Description

You can check if your account is activated, and you can edit the company and contact person information here.

*Important Note: The Partner Key required for technical integration can be found on this page.

3.6.2. UI Demo

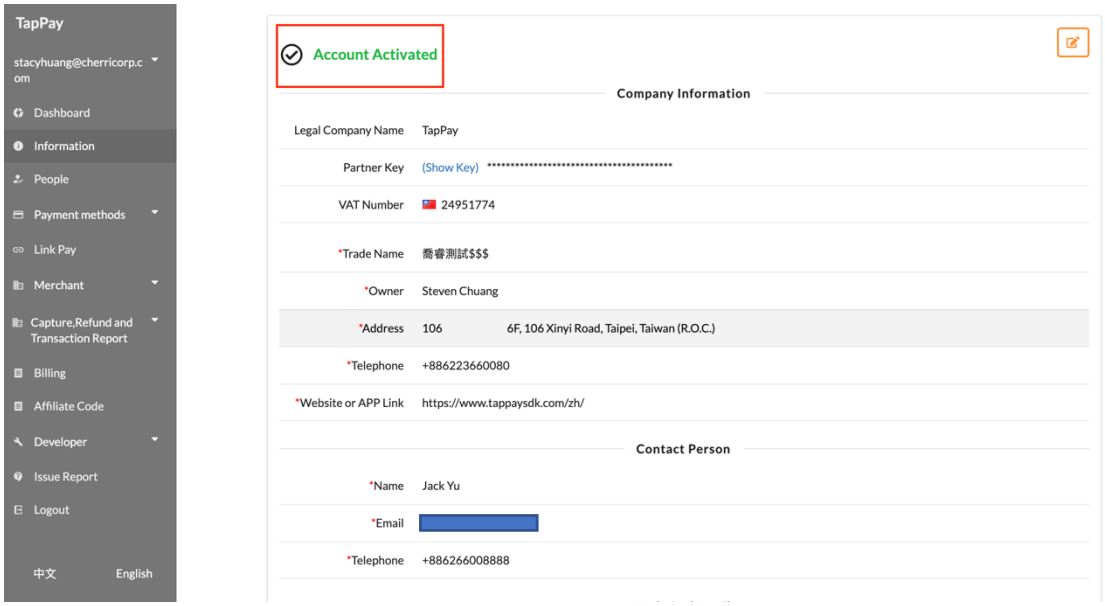


No.	Function	Description
A	Account Status	Show account status: Account active/inactive
B	Edit button	Click to edit the information on the screen.
C	Company information	Company name, partner key, VAT number
D	Other information	Trade name, owner, address, telephone, link
E	Contact person	Name, email, telephone
F	Technical email	email
G	Accounting email	email

3.6.3. Operating Instruction

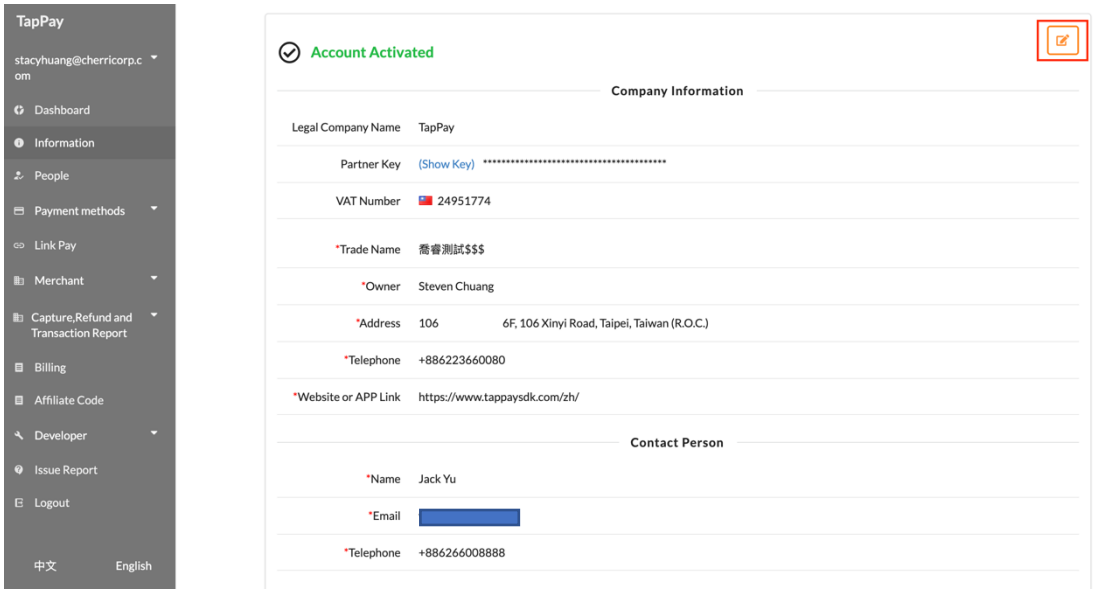
3.6.3.1. How to know if the account is activated?

- Click [information], you can see your current account status

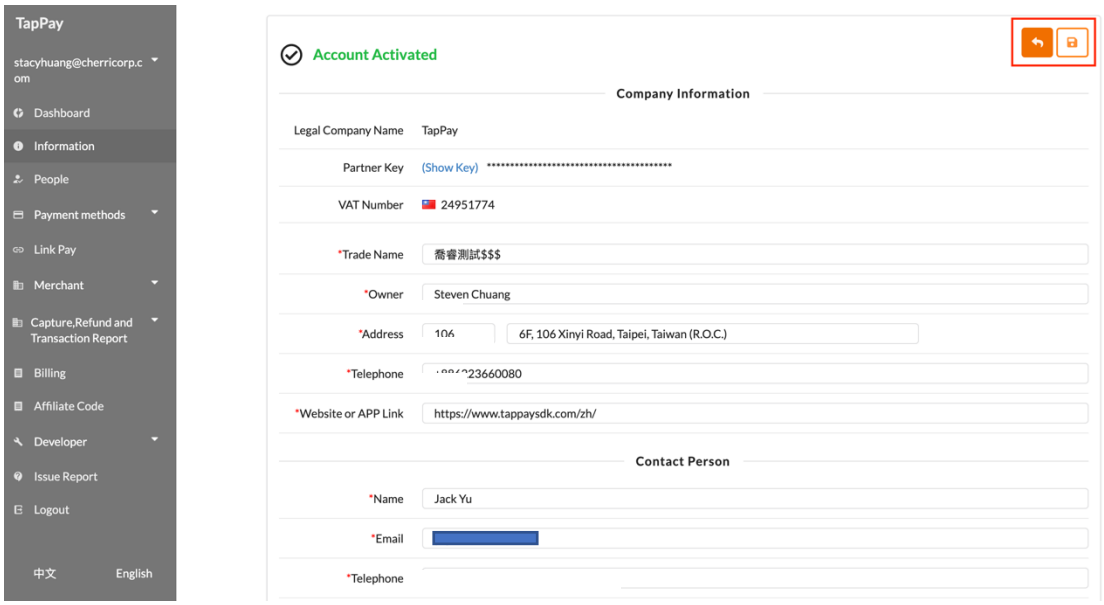


3.6.3.2. How to edit the company and contact person information?

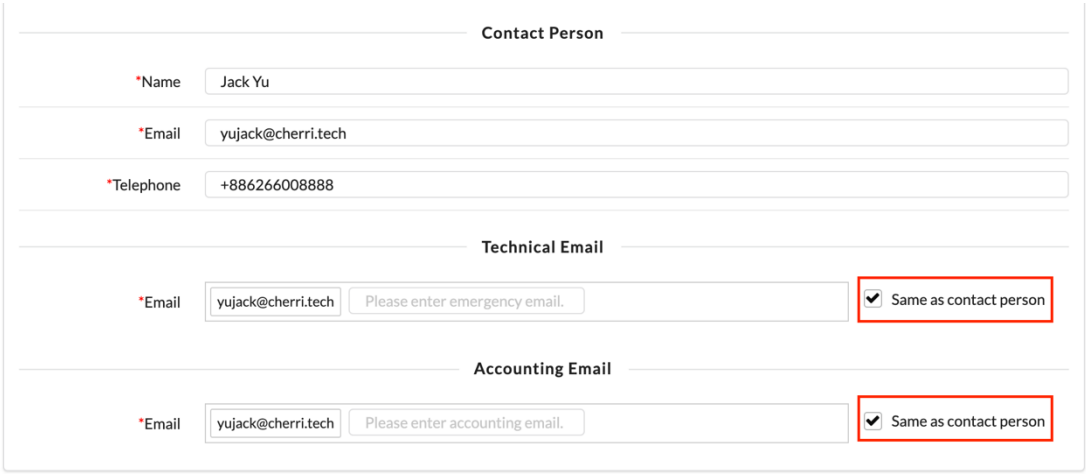
- Click the [Edit] button at the top right corner to enter the editing page



- After entering the editing page, you can edit all the information in the editing area (e.g. Company Name, Company Responsible Person, Company Address. etc.). After finishing the editing, click the [Save] button at the upper right corner to save, otherwise click the [Back] button to go back to the previous step.



- After entering the editing page, if your technical contact person or financial contact person is the same as the main contact person, you can select the checkbox, and it will automatically fill in the information for you.

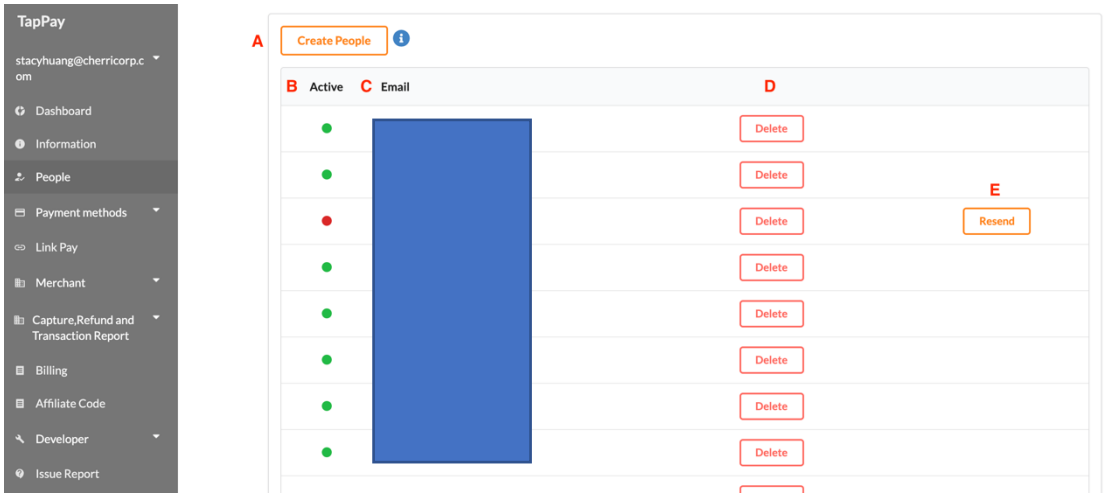


3.7. People

3.7.1. Function Description

- Add, delete, and edit backend user accounts
- Manage permissions in different functions for each account. (Write/Read/No Permissions)

3.7.2. UI Demo

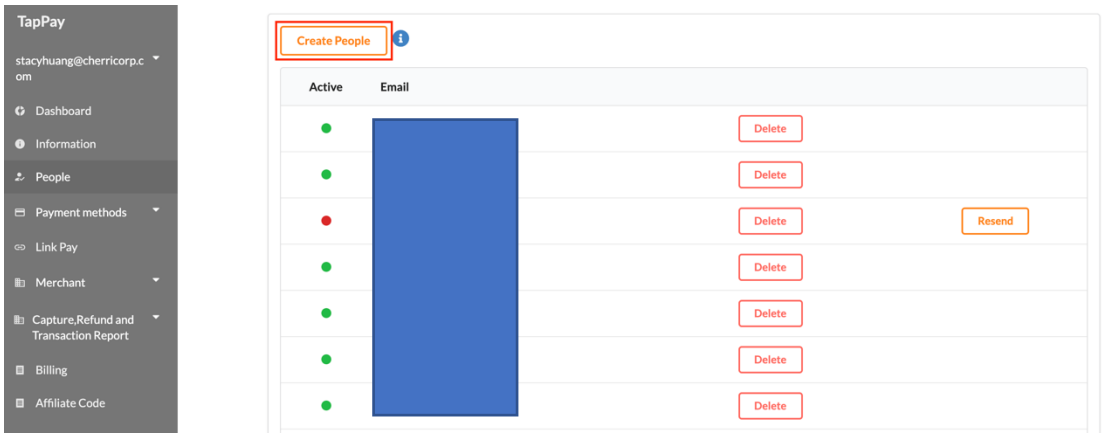


No.	Function	Description
A	Create people	Click to create a new account
B	Account status	Show current account. Green: active, Red: inactive
C	User email	User email(account)
D	Delete button	Delete account
E	Resend button	Resend the verification letter to activate the account

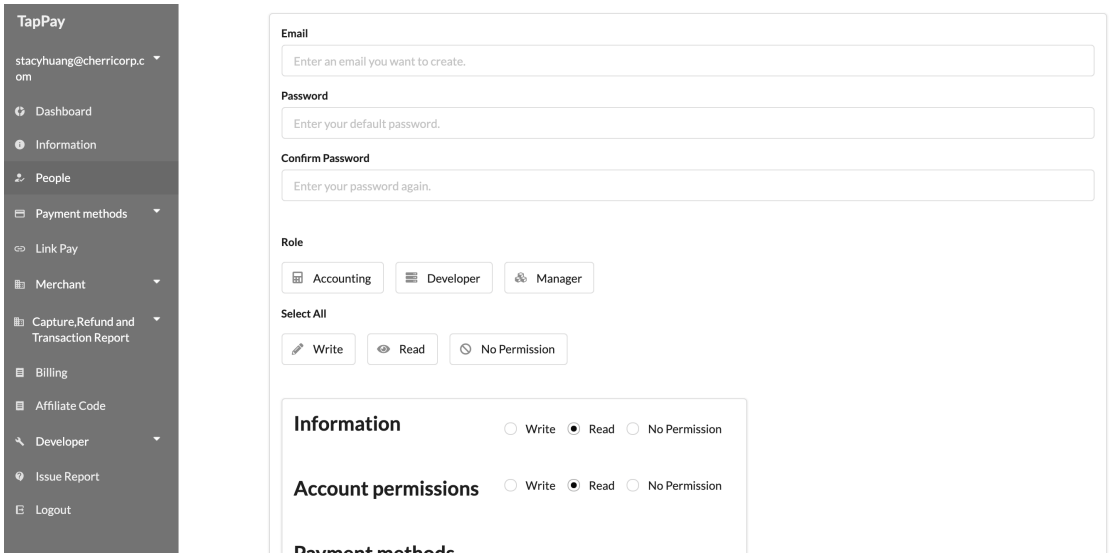
3.7.3. Operating Instruction

3.7.3.1. How to add an account?

- People > Click [Create People] at upper left corner.



- Enter the user's email and password and then set the account permissions. After editing, click [Submit].



3.7.3.2. How to quickly set the permissions?

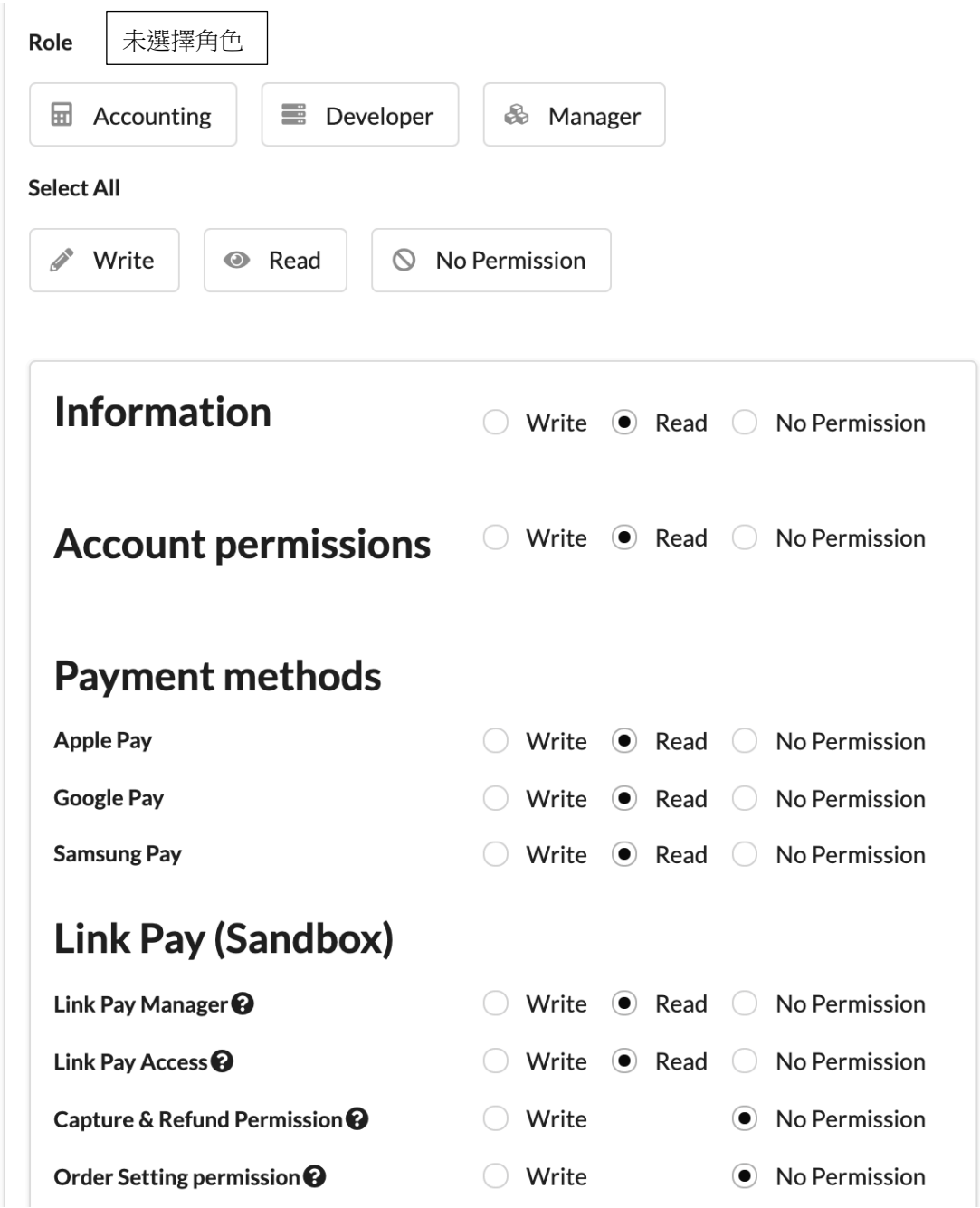
- Term Definition

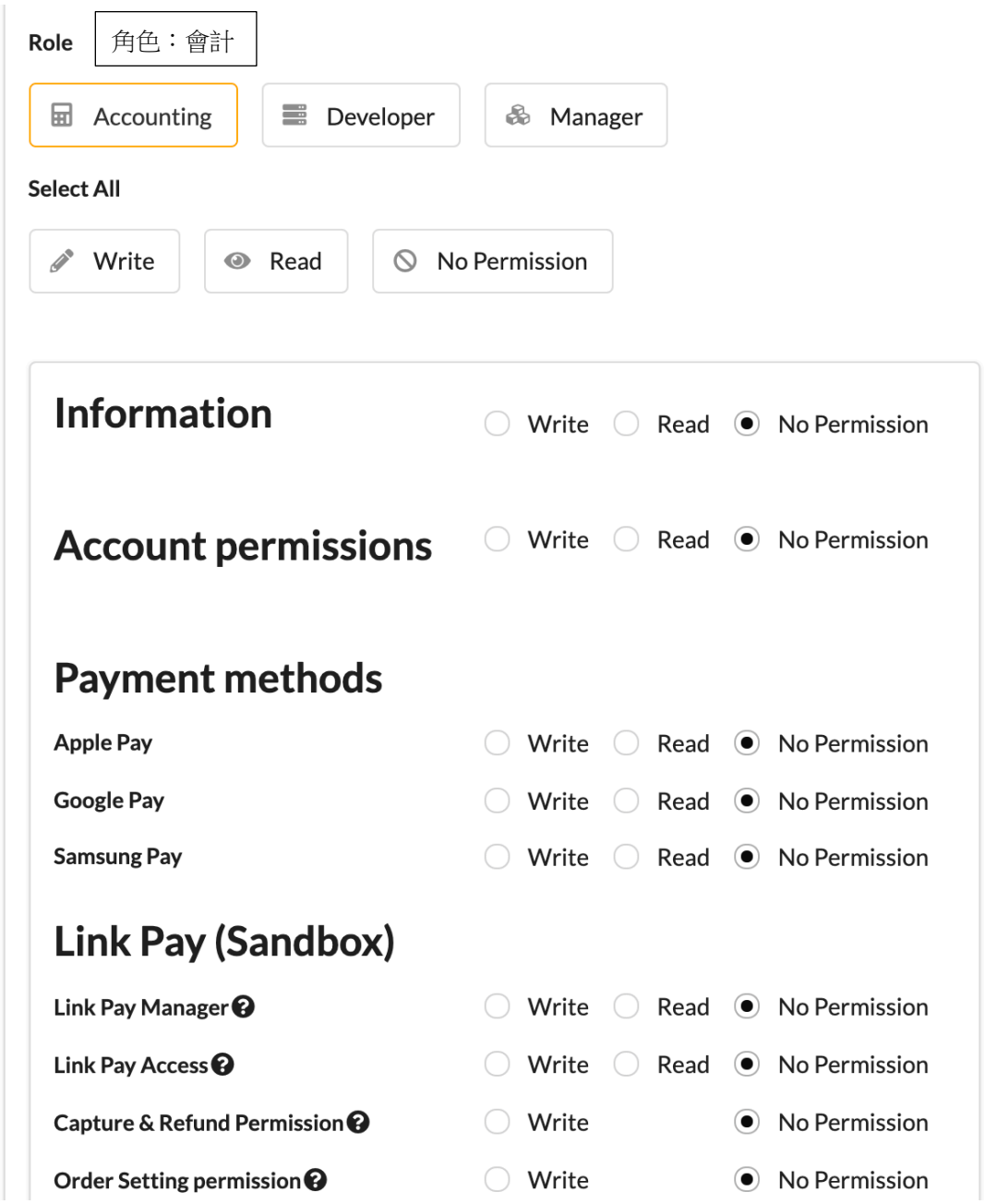
Role: Each role has default page permissions. It can be applied by clicking on (Accountant/ Developer/ Administrator).

Select All: When you want to set the same permissions for each page of the account, click (Write/Read/No Permissions) and then apply the settings.

- Application Examples

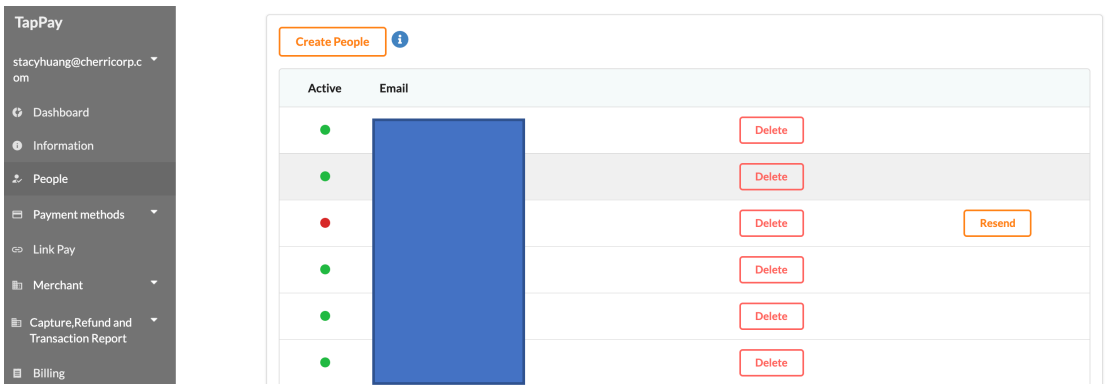
For example, if you want to set this account as an accounting, select [Role] > Accounting and adjust the permissions from the default accounting permissions on this page. If you need to fine-tune the permissions again, you can re-adjust them yourself (as shown below).


Role
未選擇角色
Accounting
Developer
Manager
Select All
Write
Read
No Permission
Information
Write
Read
No Permission
Account permissions
Write
Read
No Permission
Payment methods
Apple Pay
Write
Read
No Permission
Google Pay
Write
Read
No Permission
Samsung Pay
Write
Read
No Permission
Link Pay (Sandbox)
Link Pay Manager
Write
Read
No Permission
Link Pay Access
Write
Read
No Permission
Capture & Refund Permission
Write
No Permission
Order Setting permission
Write
No Permission

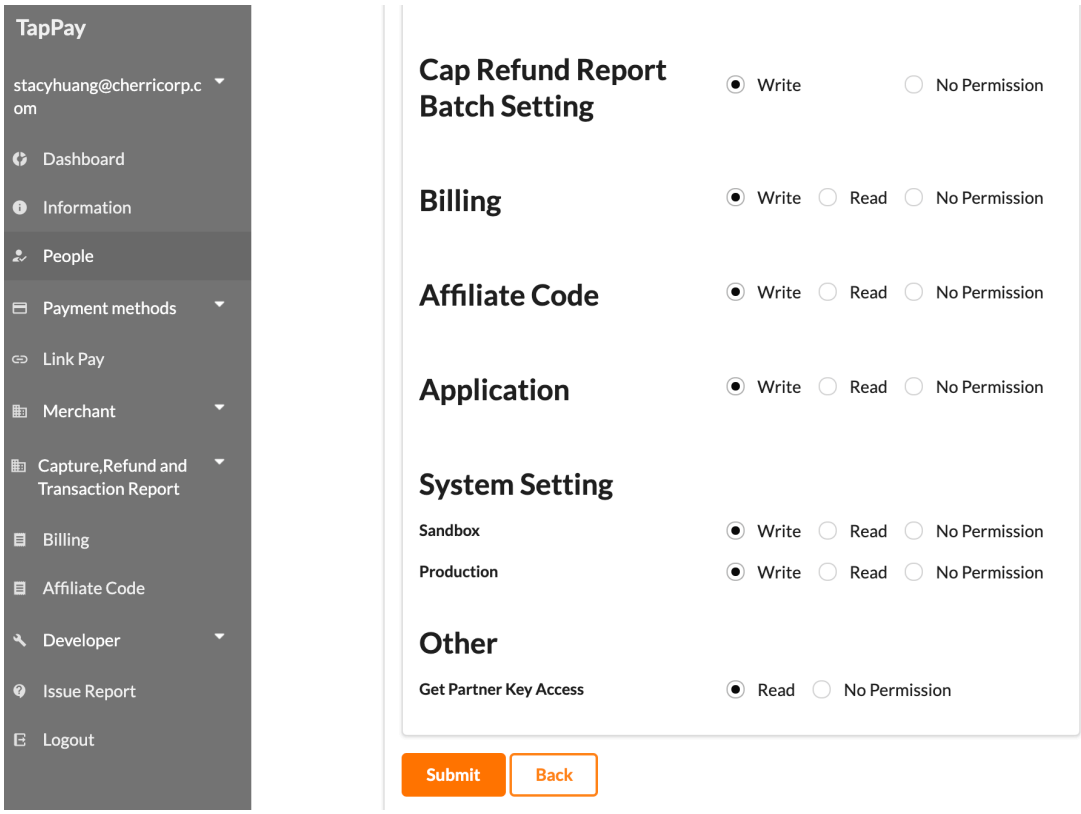


3.7.3.3. How to view and change account permissions?

- Click on the user's email address to change (e.g., change the permissions below).

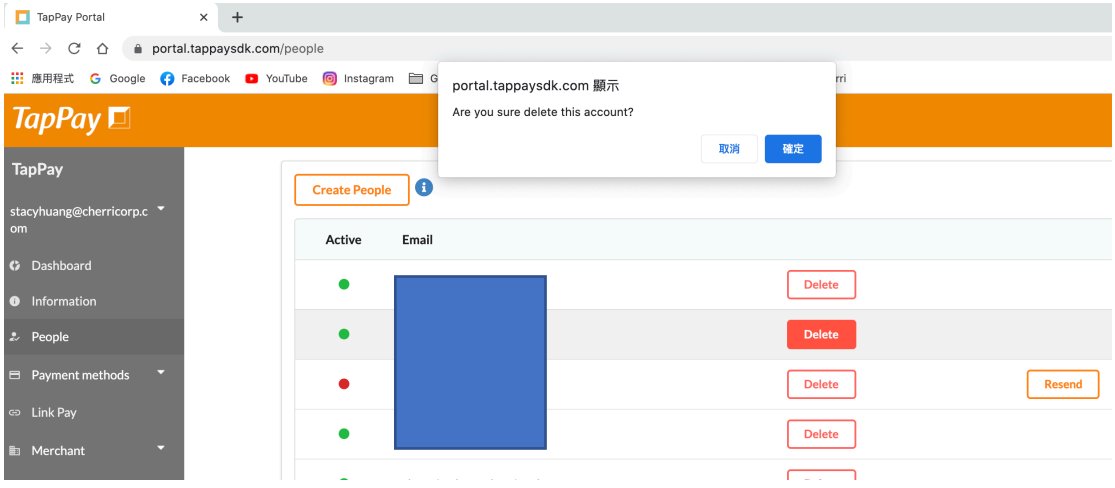


- After finishing editing, click [Submit] at the bottom to complete the changes. If you want to cancel, click the [Back] button.



3.7.3.4. How to delete an account?

- Click the [Delete] button on the right side of the mail address for the account you want to delete. After clicking on it, a window will pop up to confirm if you are sure to delete the account.

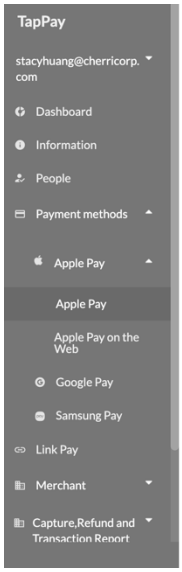


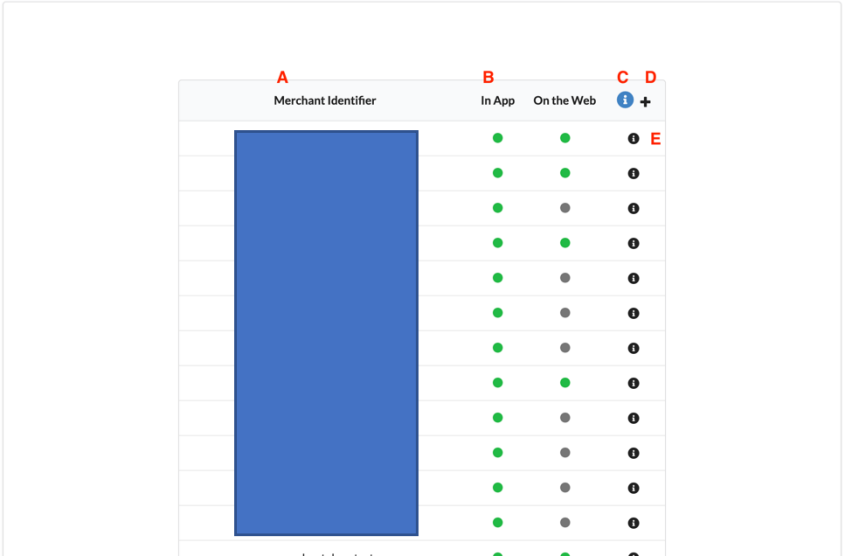
3.8. Payment > Apple Pay > Apple Pay

3.8.1. Function Description

To add an Apple Pay Merchant, you need to go to Apple Developer and apply for Merchant ID first. And then click [Apple Pay] and upload the certificate to enable the service in the production environment. After everything is completed, you can view the added Apple Pay Merchants and if they support in APP or on the Web services in the list.

3.8.2. UI Demo





No.	Function	Description
A	Merchant Identifier	You can get it on Apple Developer
B	In App/On the Web support status	green：active, gray：inactive
C	Document	Click to view developer document
D	Create Apple Pay Merchant	Click to create an Apple Pay Merchant
E	details	Click to view more information of the merchant. You can also edit or delete the merchant.

3.8.3. Operating Instruction

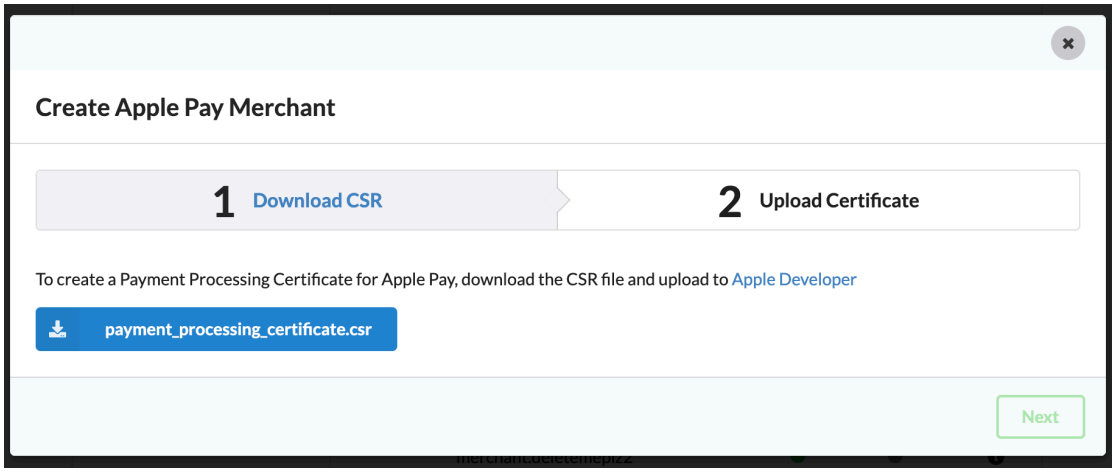
3.8.3.1. How to know the support status of each Apple Pay Merchant?

- Please go to Payment Methods>Apple Pay>Apple Pay. You will see the support status of each Apple Pay Merchant in the list below. The green light refers to [activated] while the red one refers to [inactivated].

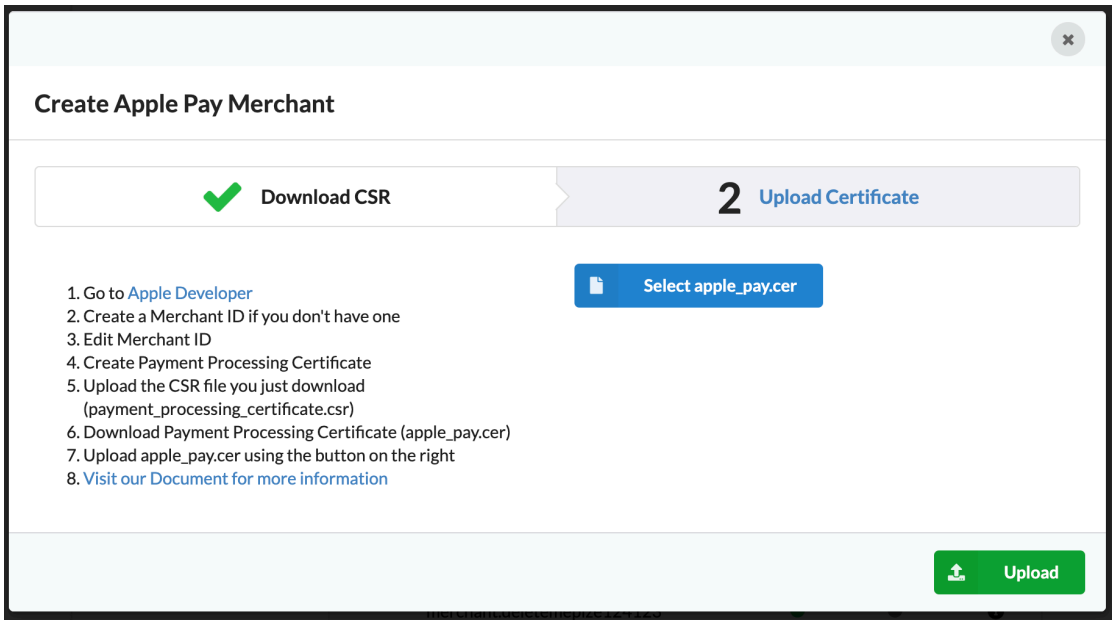
3.8.3.2. How to add an Apple Pay Merchant?

- Please click the [+] on the upper right corner.

- Download CSR and click [next].

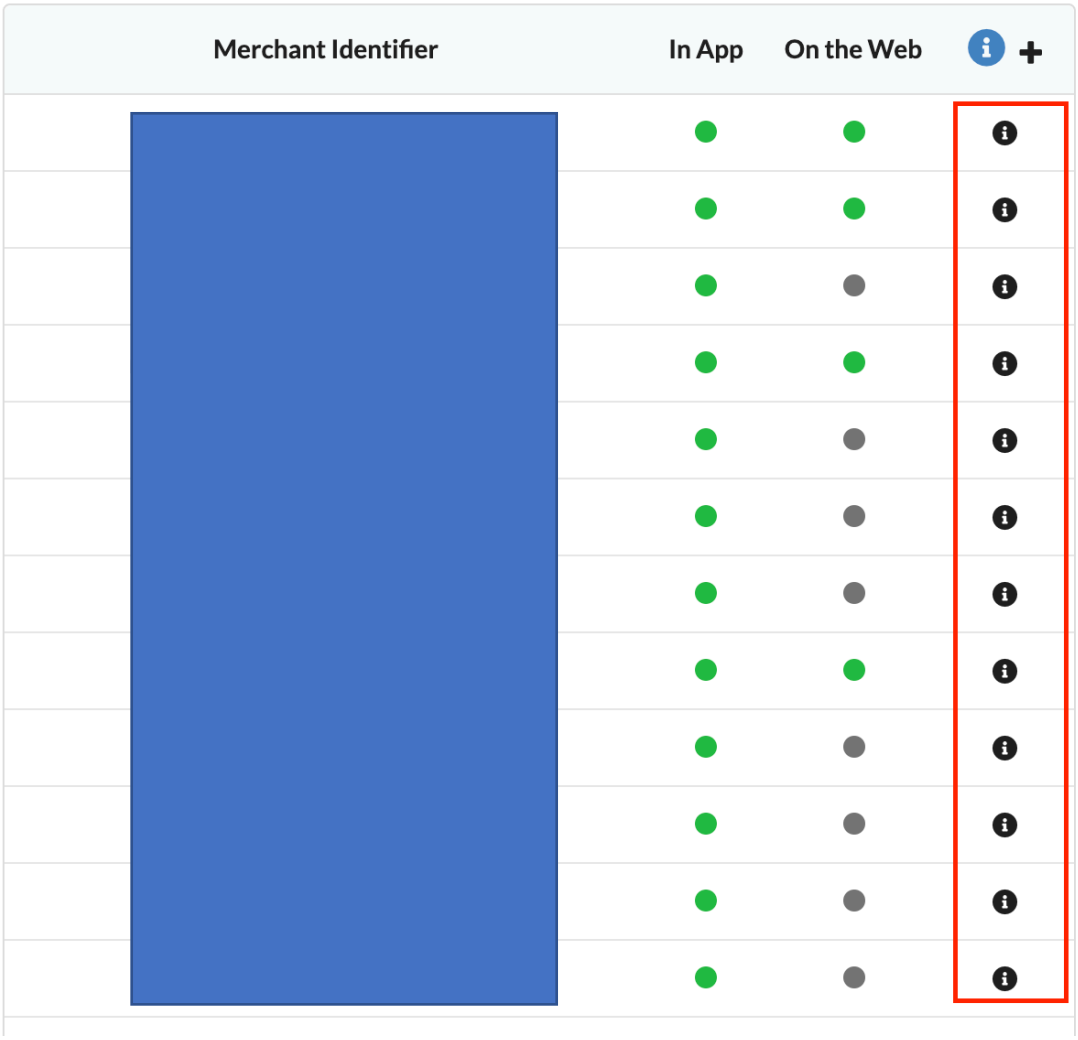


- Please go to Apple Developer to register an account. After you got the certificate, please upload it here.

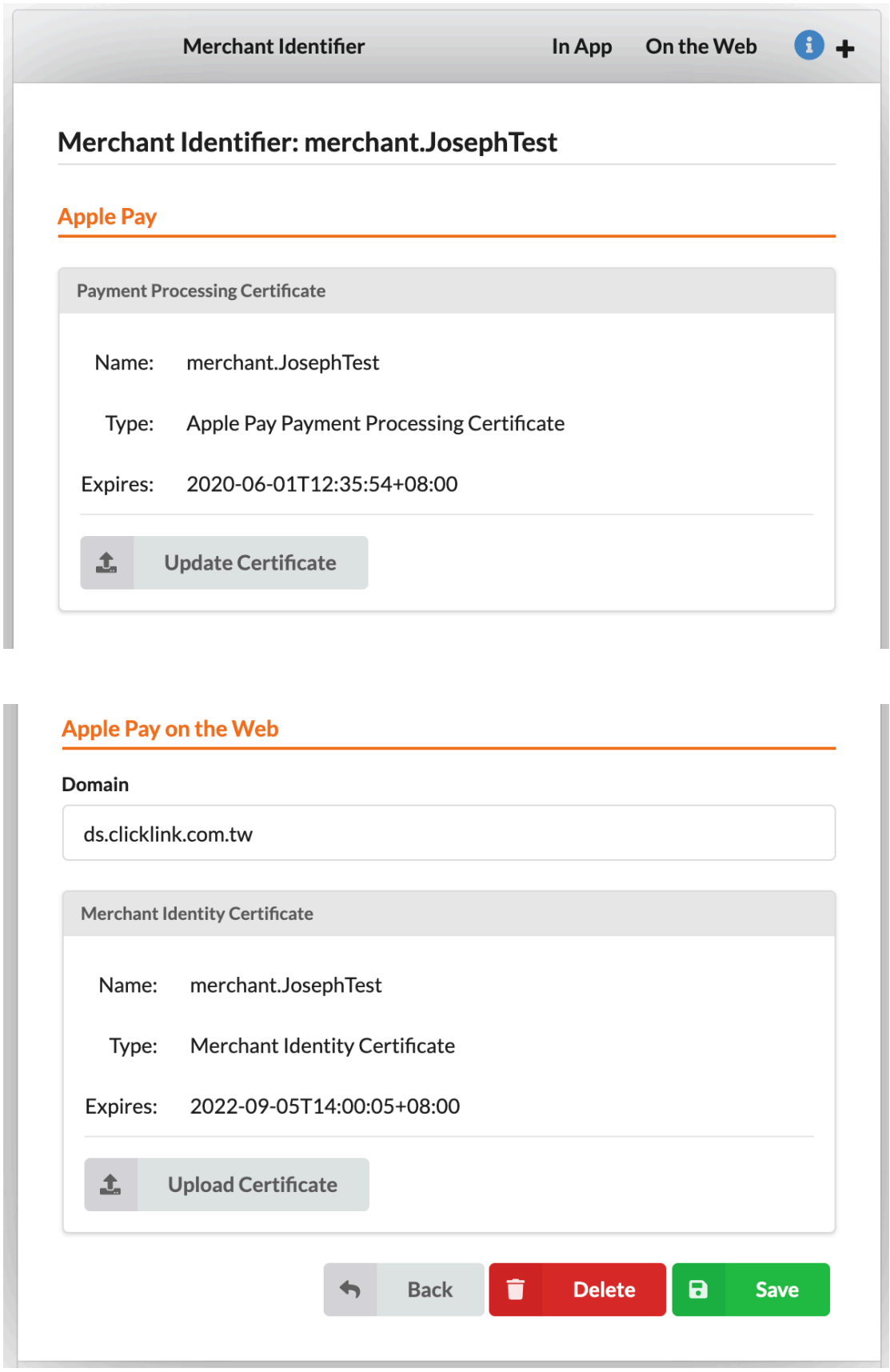


3.8.3.3. How to delete/edit an Apple Pay Merchant?

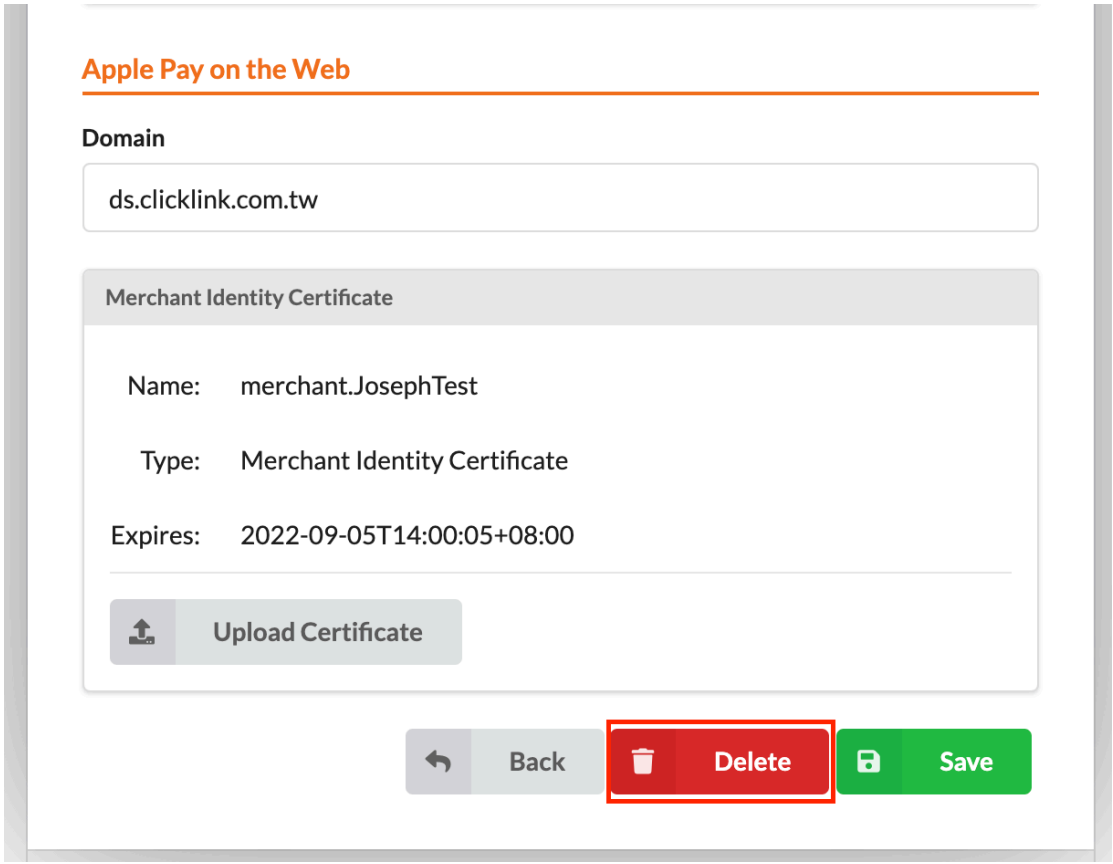
- Please click [ⓘ] in the right side of the list.



- Please edit the domain names or upload the certificate and click [save].



- If you want to delete the merchant, please click [delete]. If you want to go back, please click [Back].

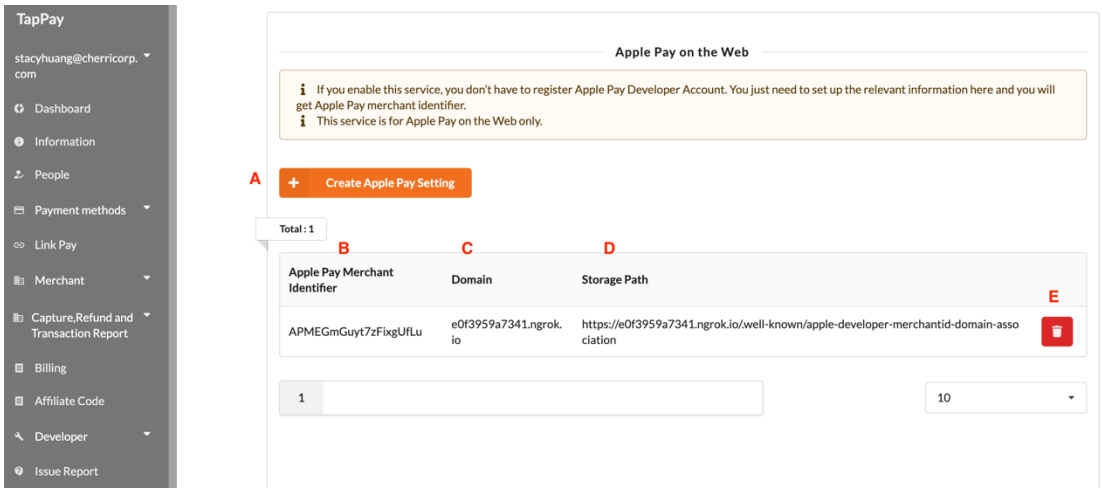


3.9. Payment Methods > Apple Pay > Apple Pay on the Web

3.9.1. Function Description

The settings of Apple Pay on the Web can be added and adjusted here.

3.9.2. UI Demo



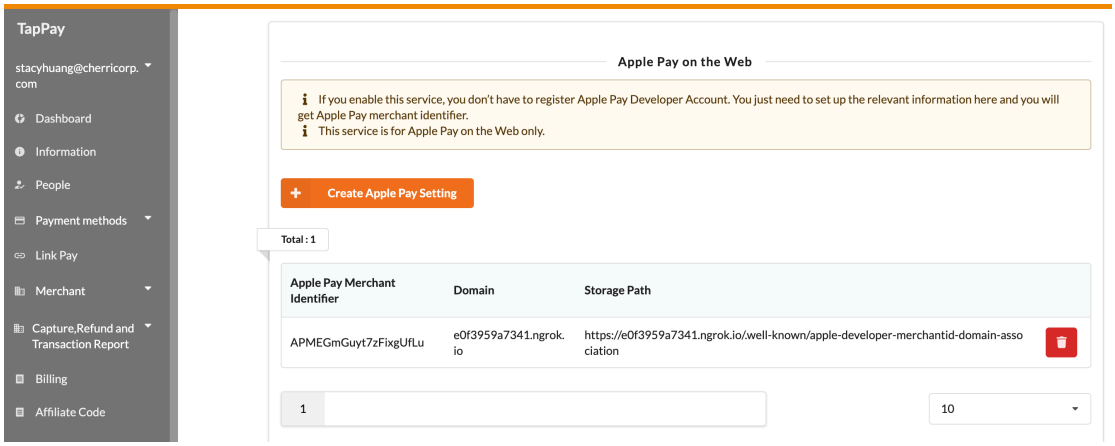
No.	Function	Description
A	Create Apple Pay Setting	Click to create a setting

B	Apple Pay Merchant Identifier	Produced by TapPay
C	Domain	Configure when you create a setting
D	Storage path	Configure when you create a setting
E	Delete button	Delete Apple Pay merchant

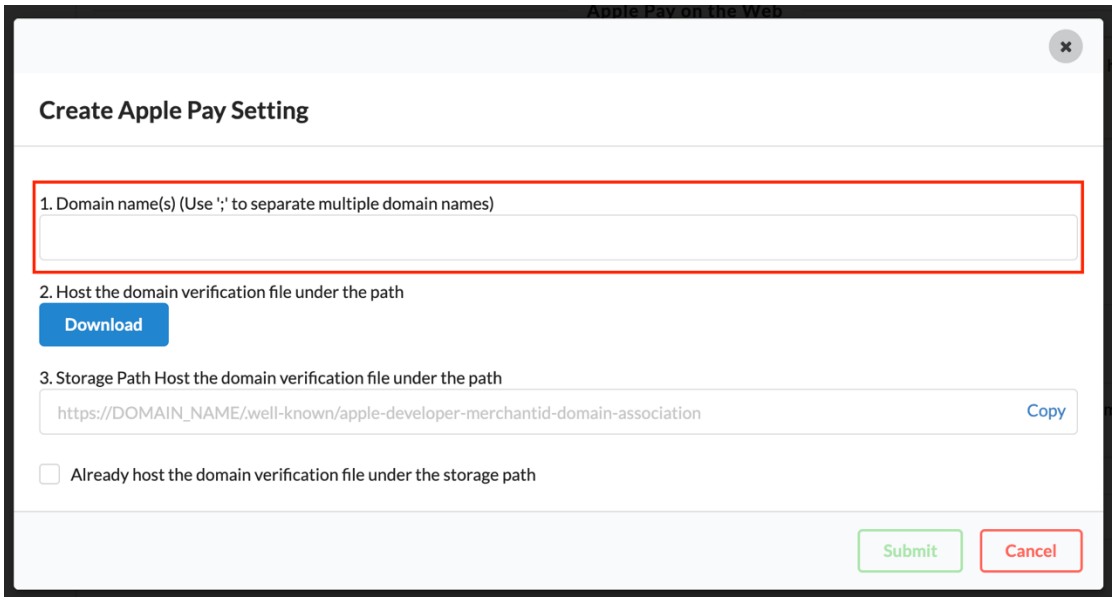
3.9.3. Operating Instruction

3.9.3.1. How to add an Apple Pay on the Web Setting?

- Click [Create Apple Pay Setting]

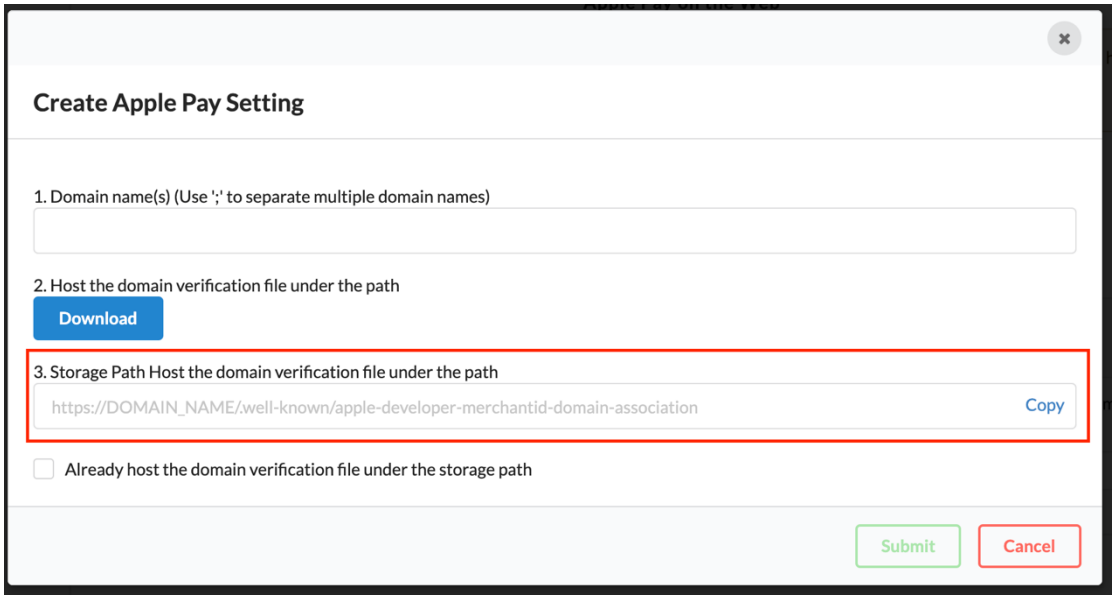


- Fill in domain names (can be multiple)

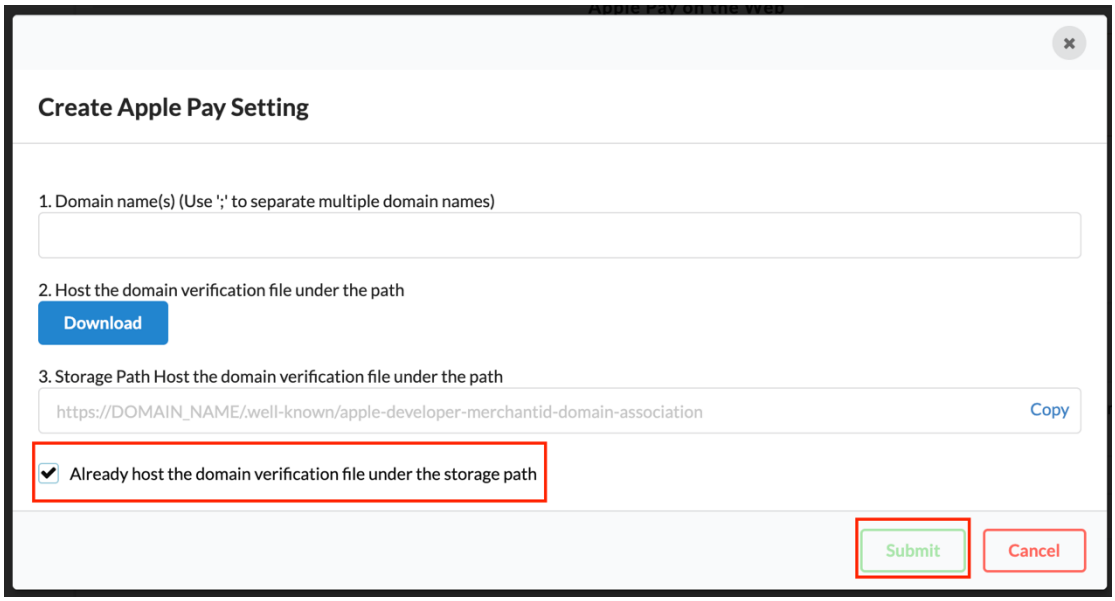


- Download the verification file

- Put the verification file under the assigned server path below.

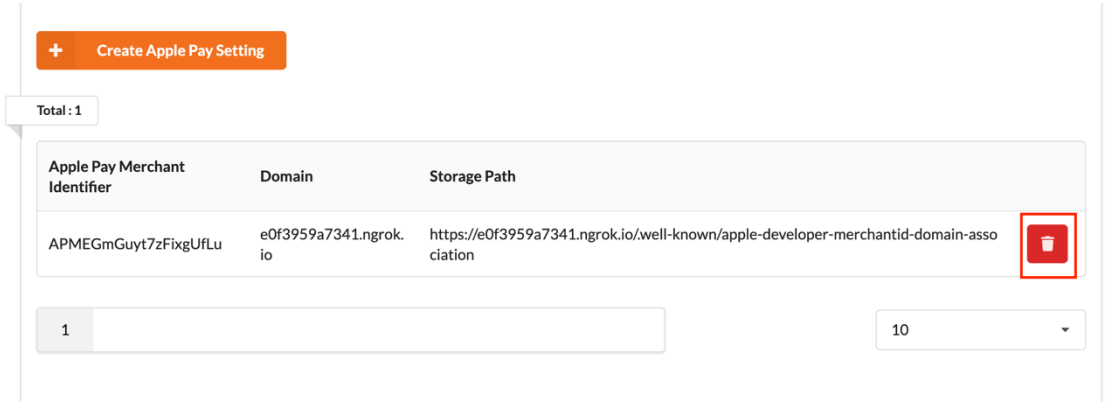


- After everything is completed, check [Already host the domain verification file under the storage path] and click [submit].



3.9.3.2. How to delete Apple Pay on the Web Setting?

- Please click the [trash can] in the right side of the list to delete a setting.



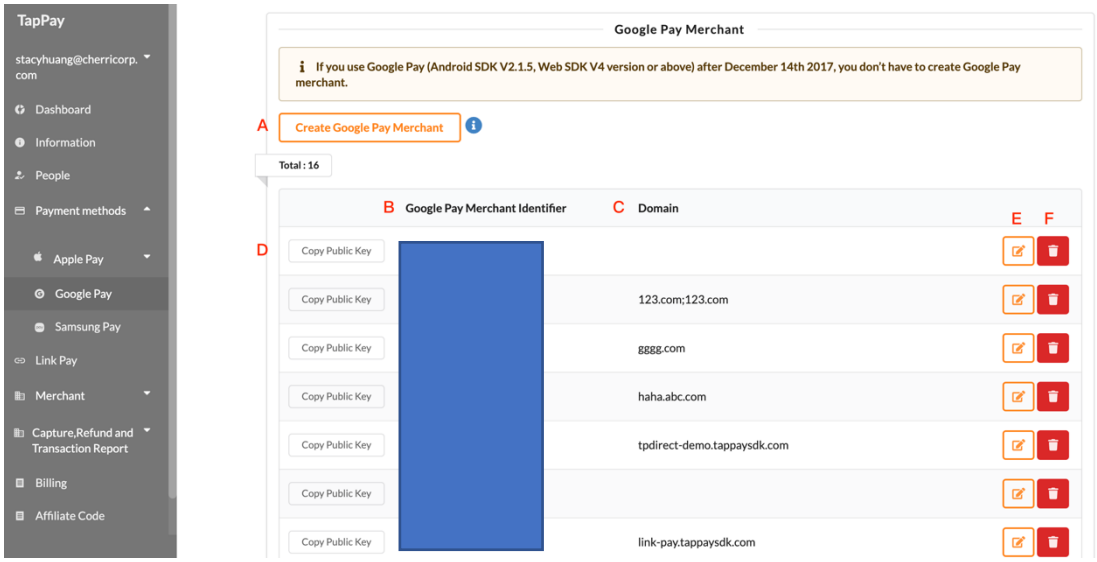
3.10. Payment Method > Google Pay

3.10.1.1. Function Description

To start to use Google pay service, please add the relevant settings here.

*Noted: If you use Google Pay (Android SDK V2.1.5, Web SDK V4 version or above) after December 14th 2017, you don't have to create Google Pay merchant.

3.10.2. UI Demo

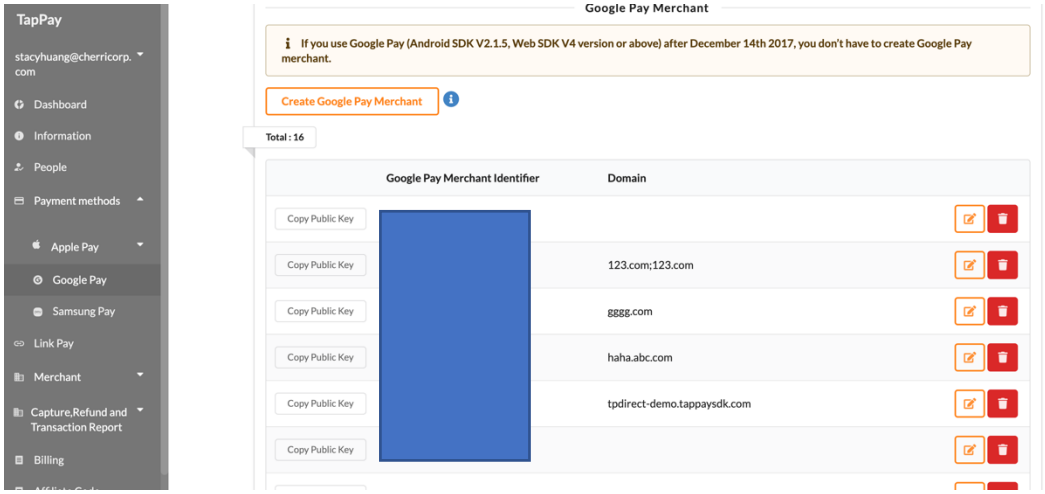


No.	Function	Description
A	Create Google Pay Merchant	Click to create a new merchant
B	Google Pay Merchant Identifier	User can self-define
C	Domain	Domain can be configured
D	Copy public key	TapPay will produce
E	Edit	Edit the domain
F	Delete	Delete the merchant setting

3.10.3. Operating Instruction

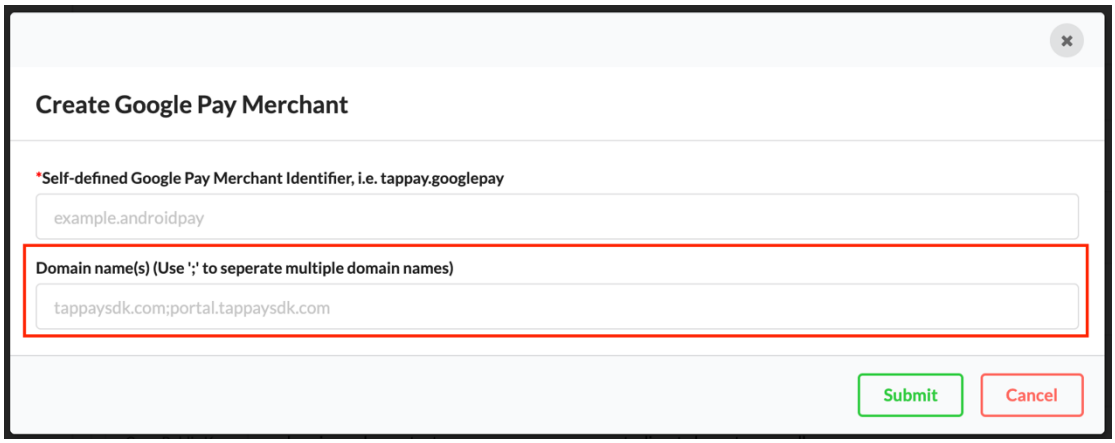
3.10.3.1. How to add a Google Pay Merchant?

- Click [Create a Google Pay Merchant]

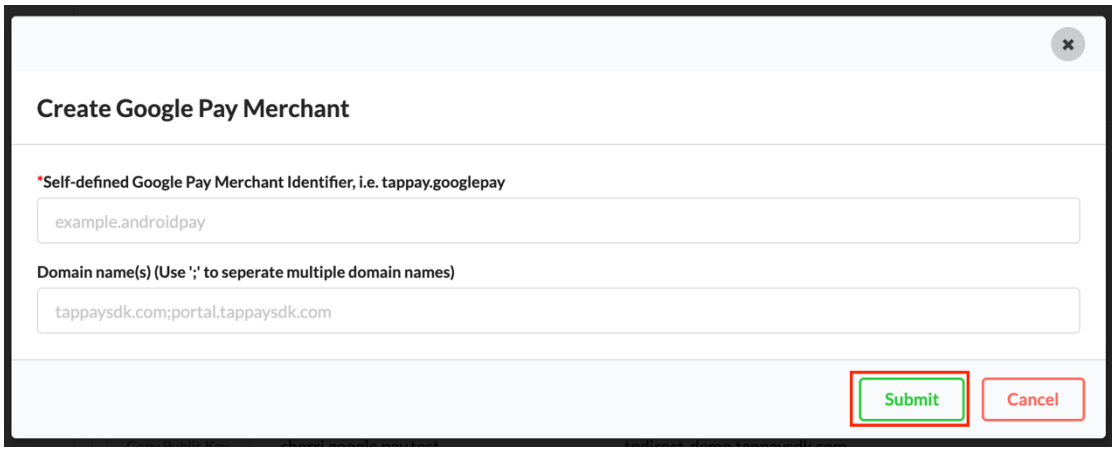


- Self-define Google Pay Merchant Identifier

- Set up domain names (can be multiple)

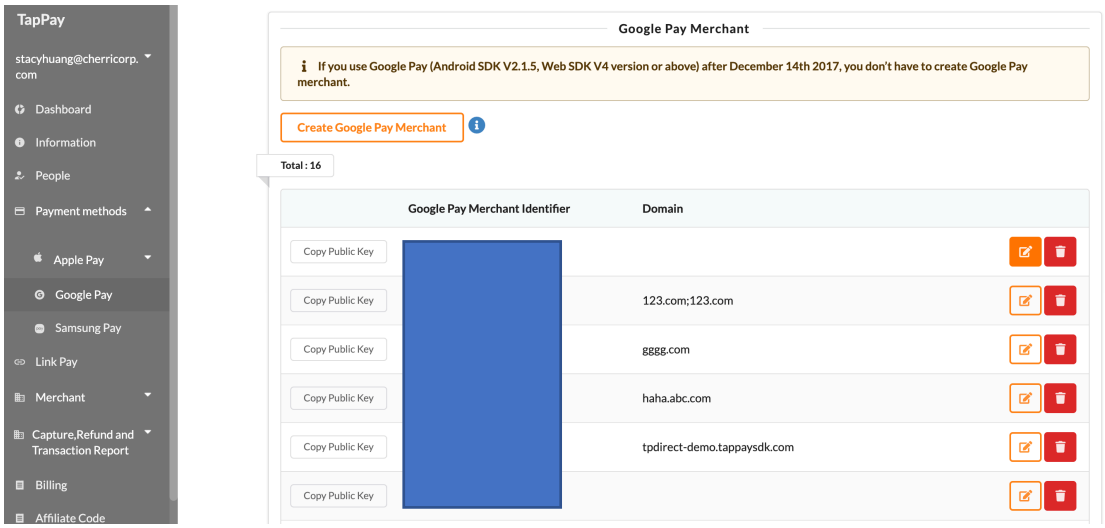


- After all is completed, click [submit]. The information will be updated immediately.

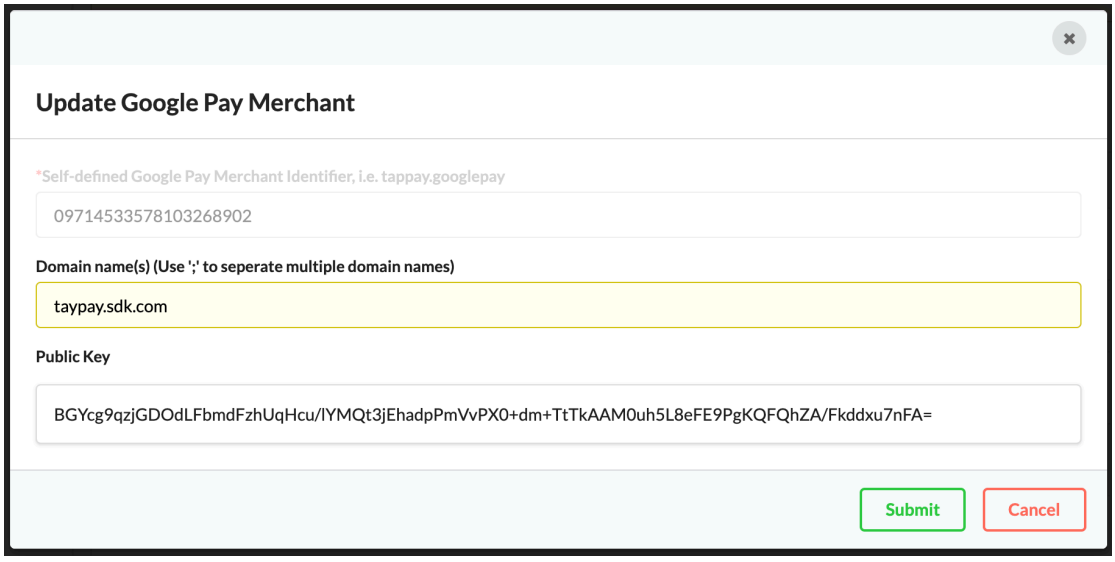


3.10.3.2. How to edit Google Pay Merchants?

- Click [edit]

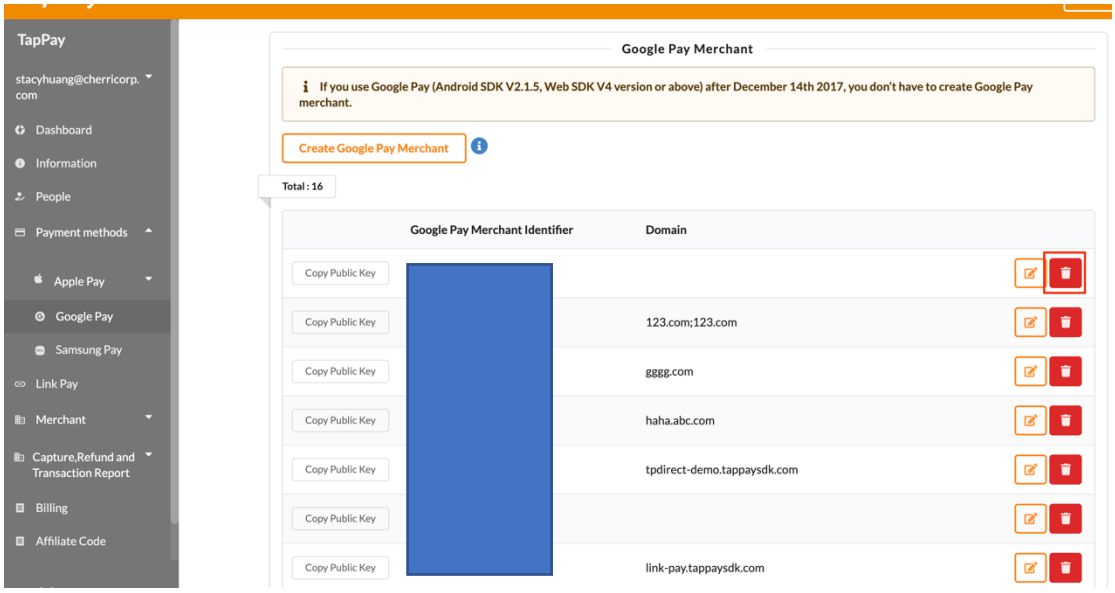


- Domain names can be edited. Click [submit] to save your update.



3.10.3.3. How to delete a Google Pay Merchant?

- Click [delete]



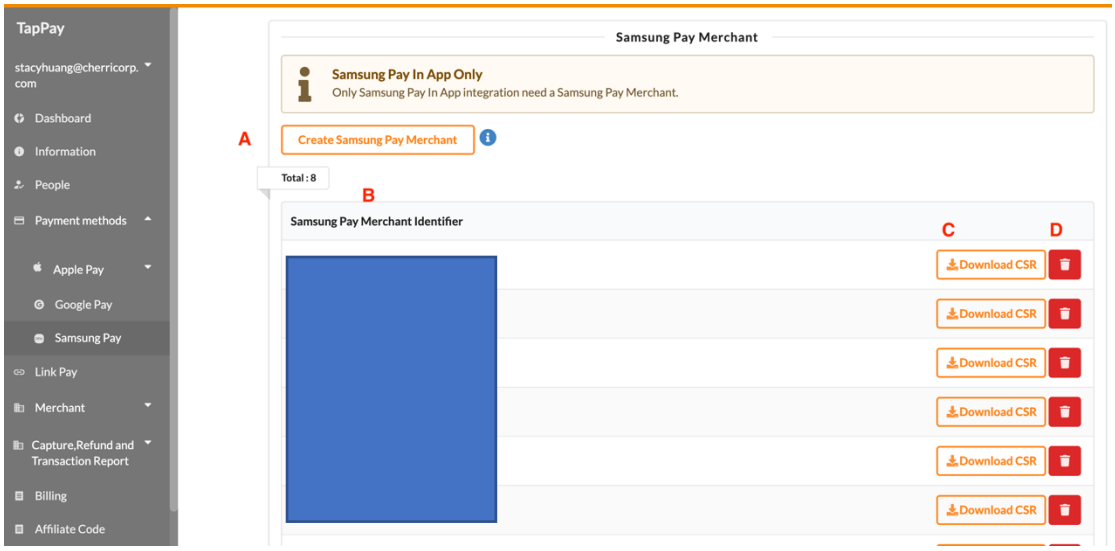
- Click [OK] to execute delete.

3.11. Payment Methods > Samsung Pay

3.11.1. Function Description

For Samsung Pay App integration, you can add Samsung Pay merchants.

3.11.2. UI Demo

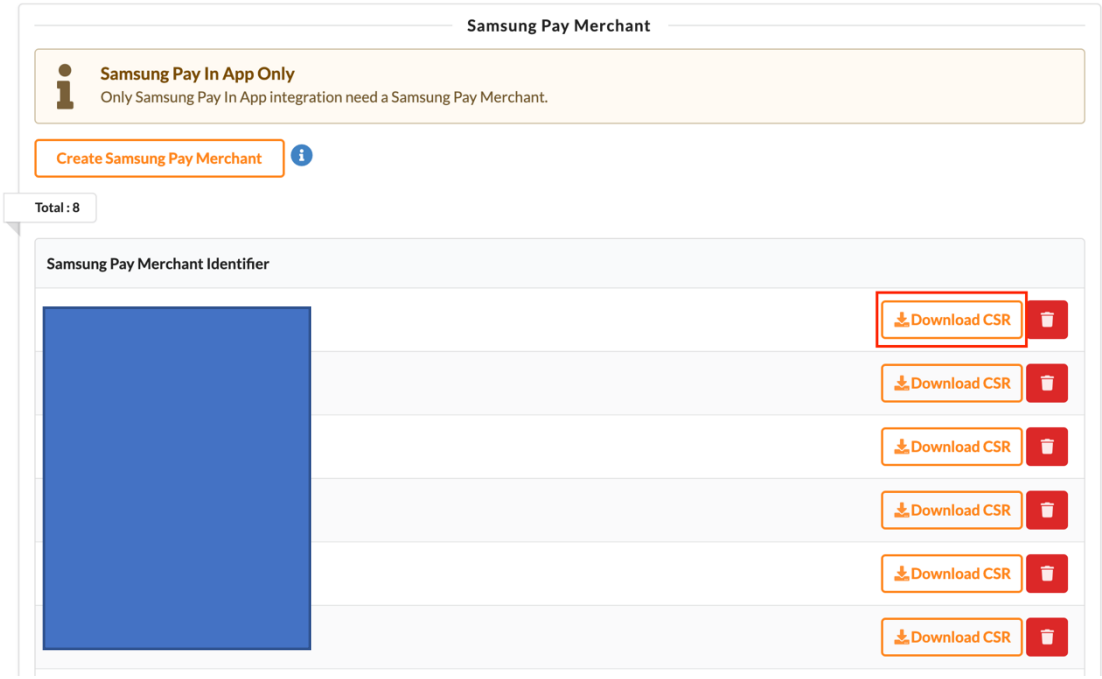


No.	Function	Description
A	Create Samsung Pay Merchant	Click to create new merchant
B	Samsung Pay Merchant Identifier	Show the merchant identifier this is configured
C	Download CSR	Click to download the file
D	Delete button	Click to delete the merchant

3.11.3. Operating Instruction

3.11.3.1. How to view the Samsung Pay Merchant Identifier and download its CSR?

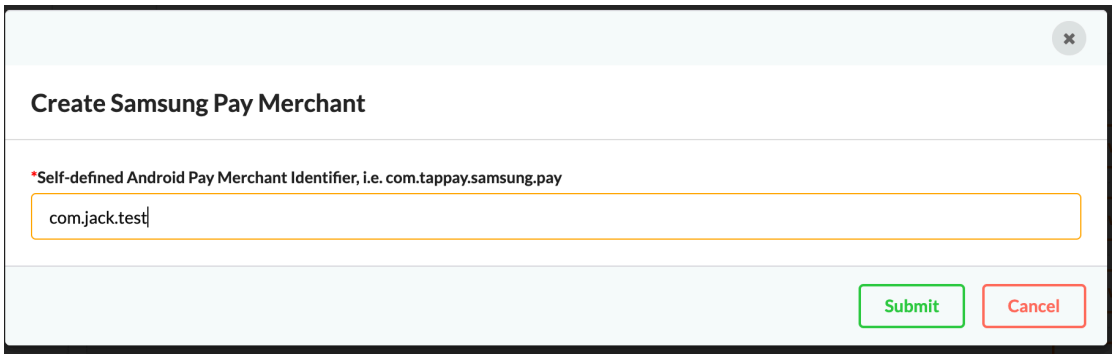
- Go to Payment Methods > Samsung Pay, you can view Samsung Pay Merchant Identifier in the list. You can download CSR as follow.



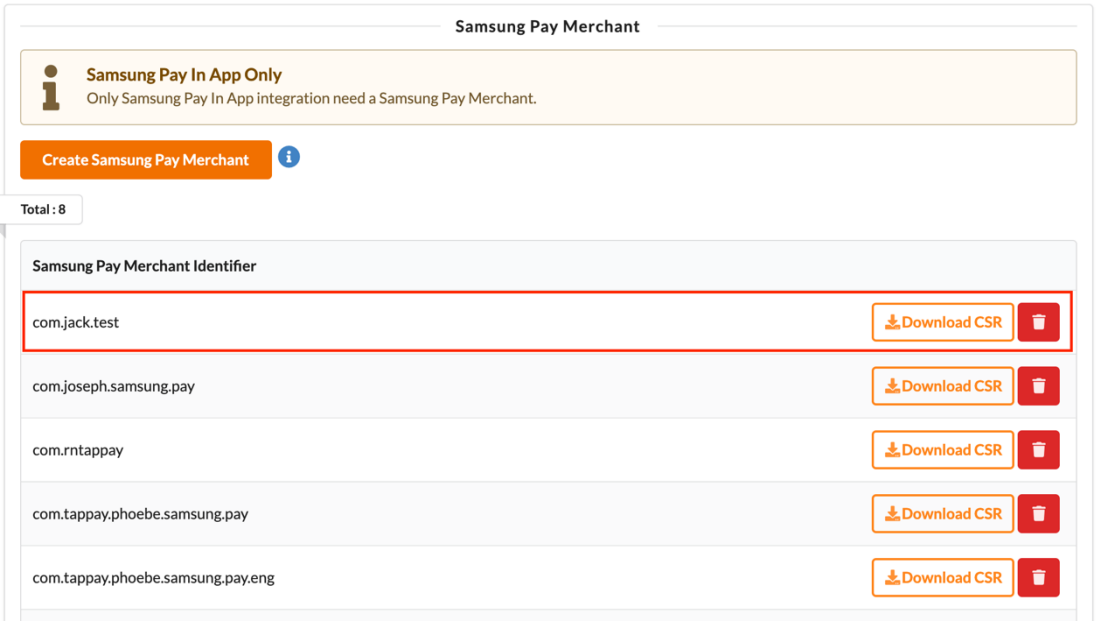
3.11.3.2. How to add a Samsung Pay Merchant?

- Click [Add Samsung Pay merchant]

Enter the Samsung Pay Merchant identification code and click [Submit] (for example: add a Samsung Pay merchant: 123.tappay.samsung.pay)

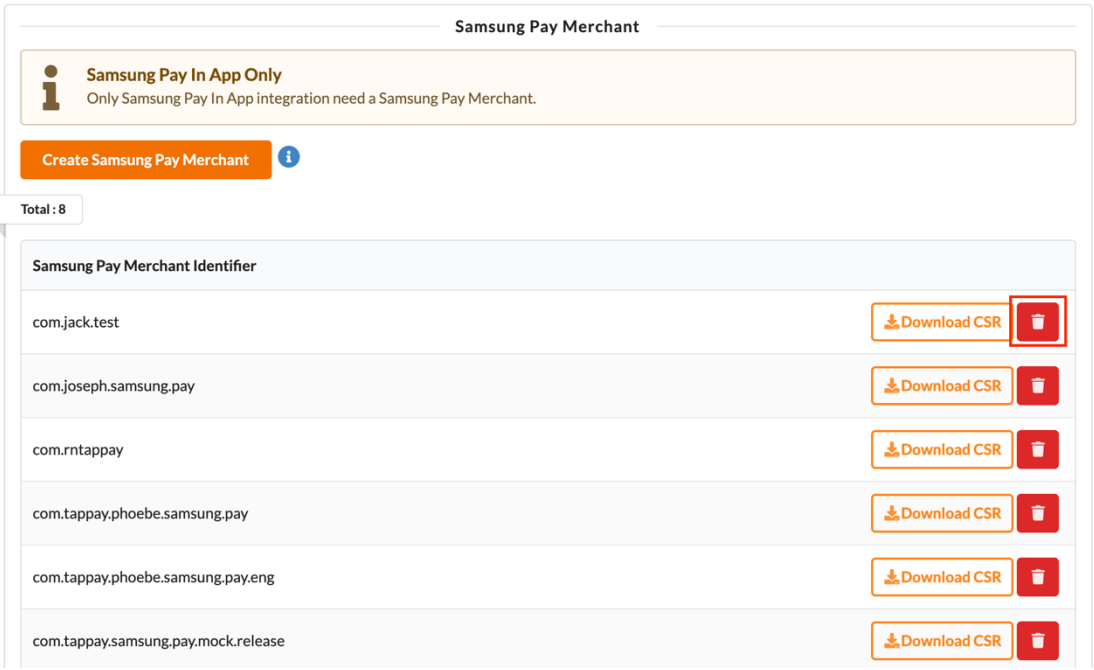


- If it is created successfully, it will immediately show on the screen and automatically generate the corresponding CSR file.



3.11.3.3. How to delete a Samsung Pay Merchant?

- Click the [delete] button on the right side to delete 123.tappay.samsung.pay (total of 5 records).



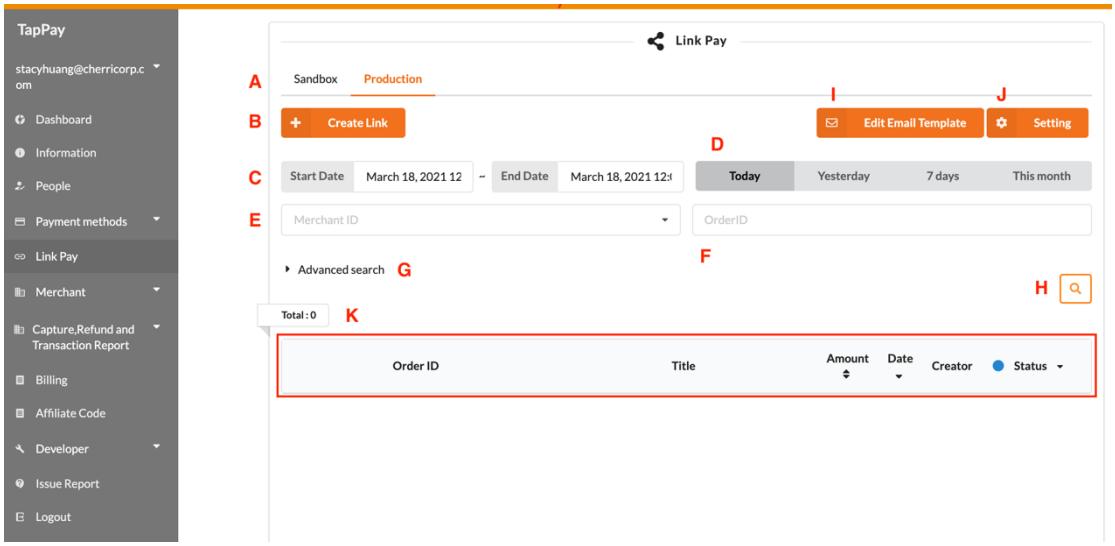
- A confirmation window pops up. Once it is deleted, it cannot be recovered. Click [OK] to confirm the deletion, otherwise click [NO] to cancel.

3.12. Link Pay

3.12.1. Function Description

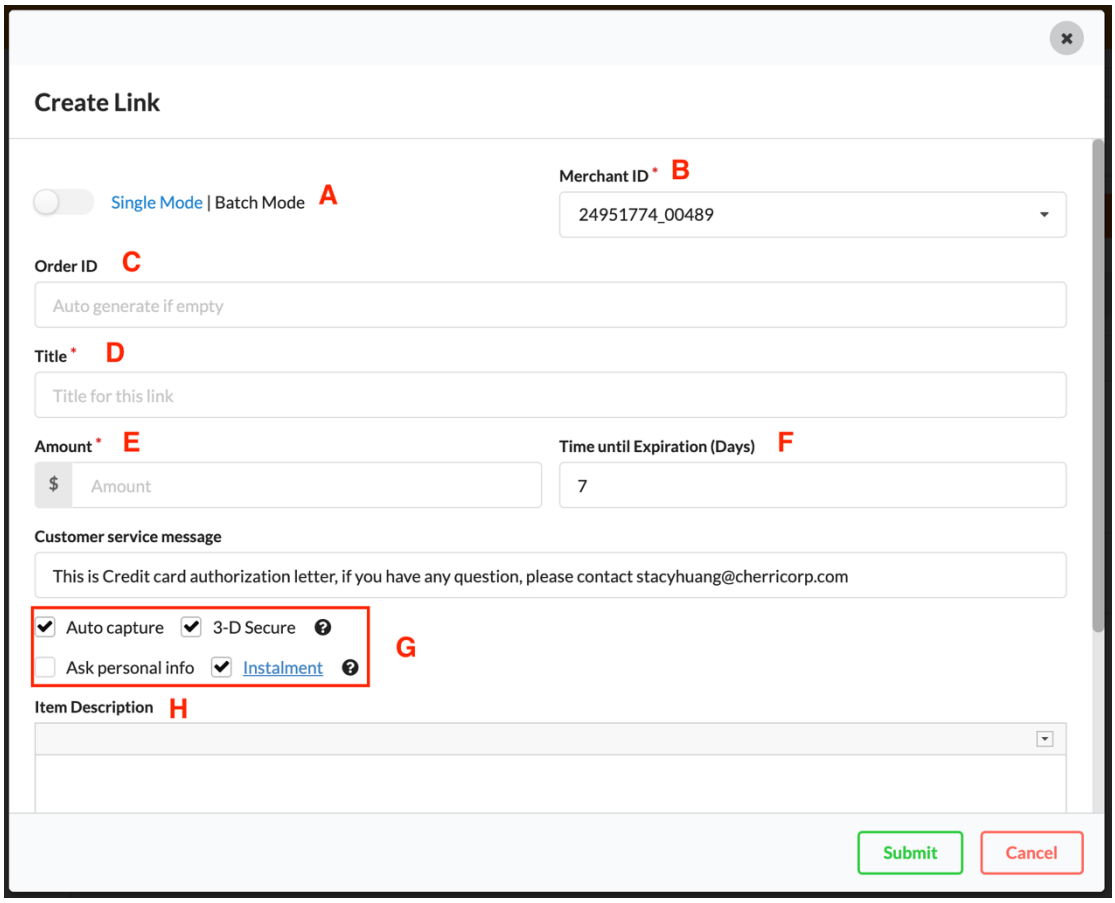
You can create links(orders) and fill in order information here. Once you have created the link, the link can be sent to your designated consumer account and paid.

3.12.2. UI Demo—Link Pay



No.	Function	Description
A	Sandbox/production	Switch between sandbox and production
B	Create link	Create a new link
C	Start/end time	Search for orders in a certain period
D	Quick search	Searching criteria: Today, yesterday, 7 days, this month
E	Merchant ID	Search for Merchant ID
F	OrderID	Search for OrderID
G	Advanced search	Advanced criteria
H	Search button	Click to conduct search
I	Edit email template	Click to edit email templates
J	Edit setting	Edit link pay settings
K	Show order information	Show searching results

3.12.3. UI Demo—Create a Link

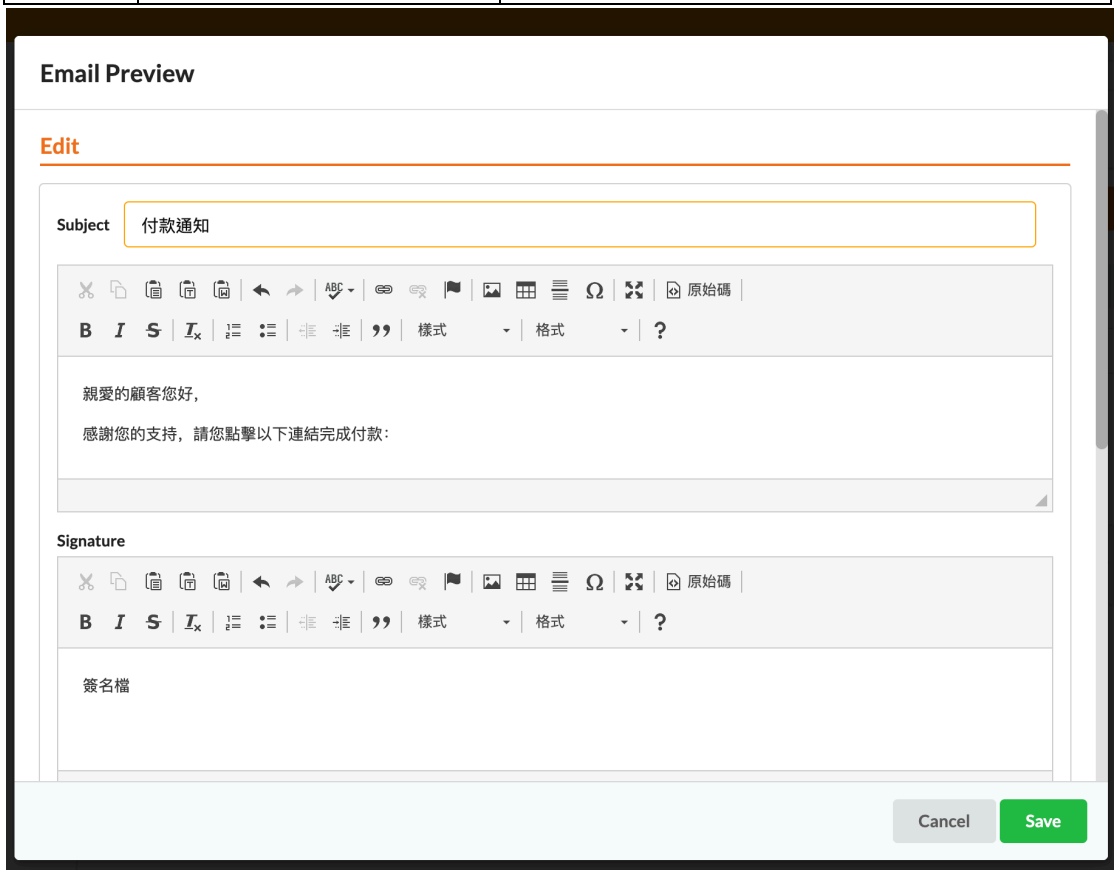


No.	Function	Description
A	Single/batch mode	Single mode：produce one link Batch mode：produce multiple links
B	Merchant ID	Acquirer account *Now we only support Direct Pay, Google Pay and Apple Pay.
C	Order ID	Single mode：auto generate if empty Batch mode：auto generate
D	Title	The title of the item
E	Amount	Item amount
F	Time until expiration	Number of days before expiration
G	Link pay settings	-auto capture：if selected the payments will be captured that day, otherwise the payment will not be captured automatically after customer has paid. 有 -3D secure：select whether you need 3D secure when customers attempt to pay.

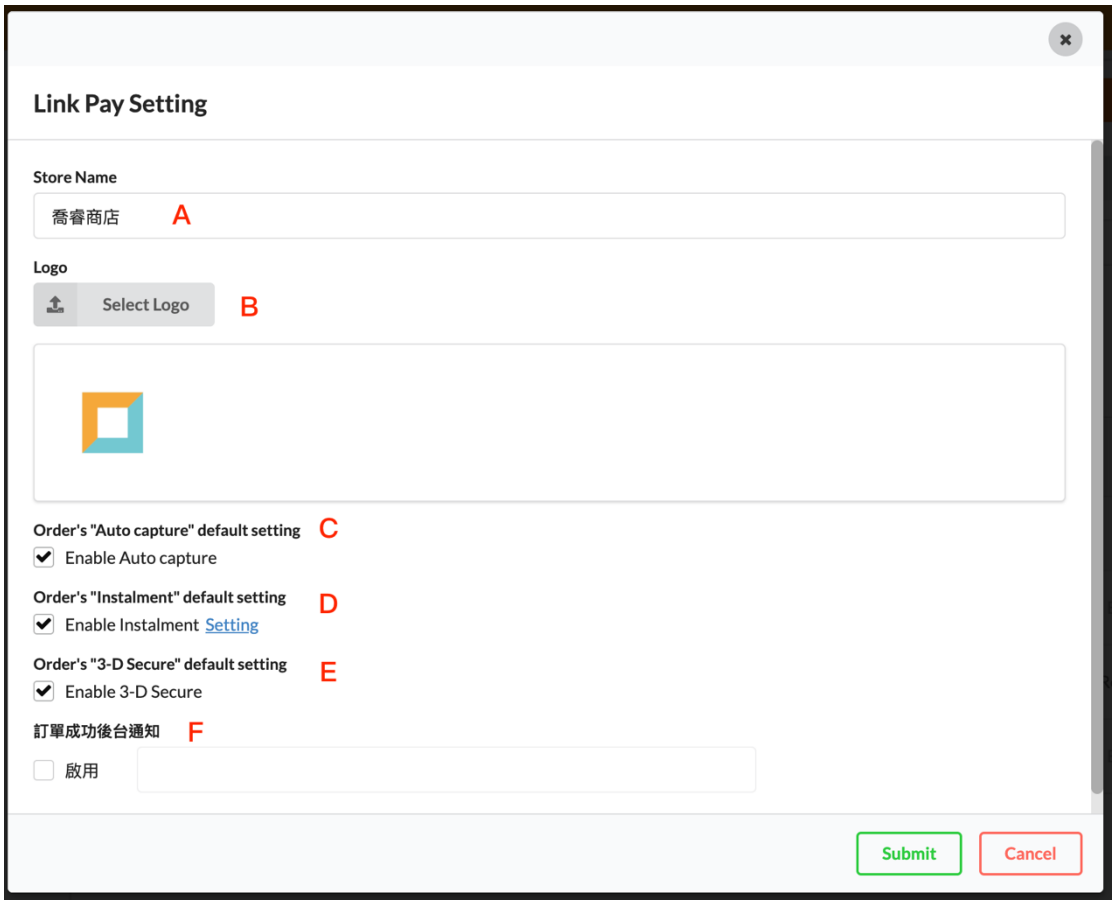
		-ask personal info -instalment：select if the Merchant ID supports instalments. Now we only support on-us cards of CTBC, E.SUN, Cathay and for other acquirers such as NCCC, NewebPay, GP, the merchant should sign the contract to accept other cards.
H	Item description	Item description *If you choose NCCC, GP, NewebPay as your acquirer, we advise you to list your cooperated banks here to let the consumers know which card they could use to pay.

3.12.4. UI Demo—Edit Email template

No.	Function	Description
A	Subject	Email subject
B	Content	Email content
C	Signature	Email signature

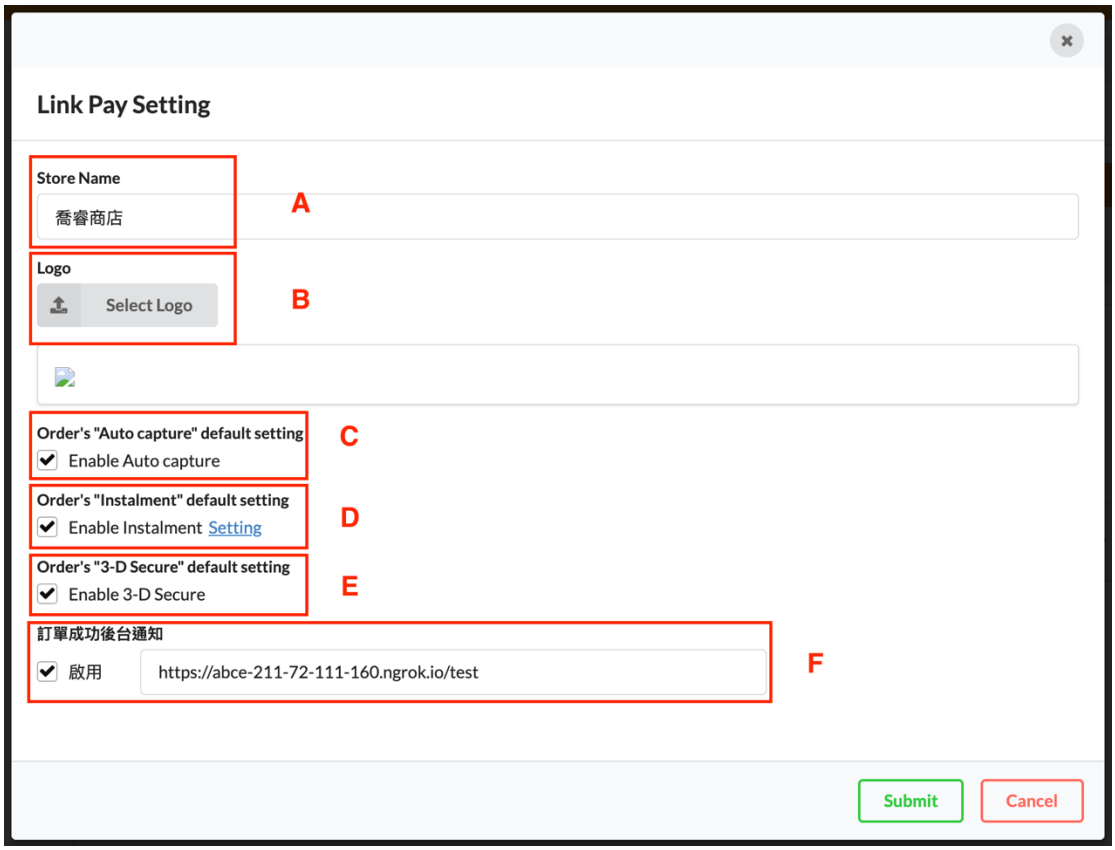


3.12.5. UI Demo—Link Pay Setting



No.	Function	Description
A	Store name	Store name shown above the link
B	Logo	Logo shown above the link
C	Auto capture default setting	Capture the payment today if selected. It will be selected as default when you create an order.
D	Instalment default setting	Activate instalment if selected. It will be selected as default when you create an order.
E	3D secure default setting	Activate 3D secure if selected. It will be selected as default when you create an order.
F	Order notification	Activate backend notification if selected and filled. When the order is successfully paid, you will receive backend notification.

3.12.6. UI Demo—Link Pay Setting

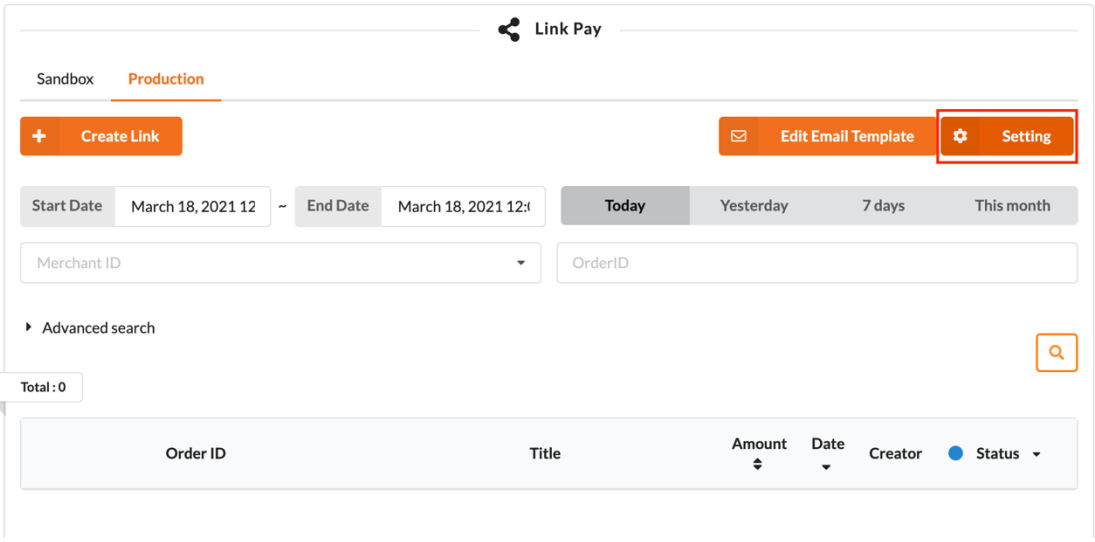


No.	Function	Description
A	Store Name	Store Name shown on Checkout page
B	Logo	Logo shown on Checkout page
C	Auto Capture Default Setting	The Auto Capture will be “on” when you create an order.
D	Instalment Default Setting	(1)For Merchant ID’s Order: The Instalment will be ”on” when you create an order. (2)Instalment Setting: Your acquirers’ default of instalment periods can be saved here. Please be sure to click [submit] on the Setting Page to save the periods.
E	3-D Secure Default Setting	For Merchant ID’s Order: 3-D Secure will be “on” when you create an order.
F	Notification url	You can tun it on and provide your notification url, which we will POST notify to you when the order is paid.

3.12.7. Operating Instruction

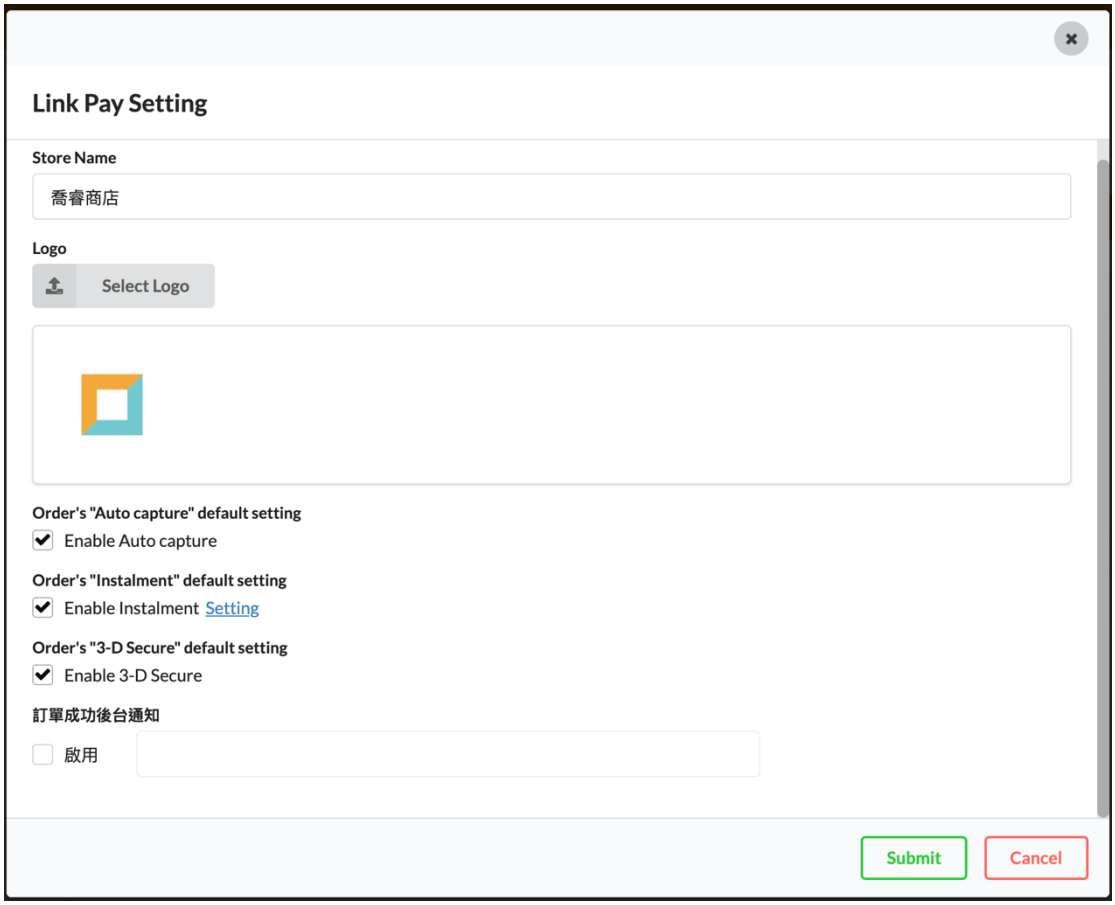
3.12.7.1. How to change a merchant’s name/logo or payment method in Link Pay?

- If you want to change the merchant's name/logo or payment method in Link Pay, Click [Settings] at the top right corner.

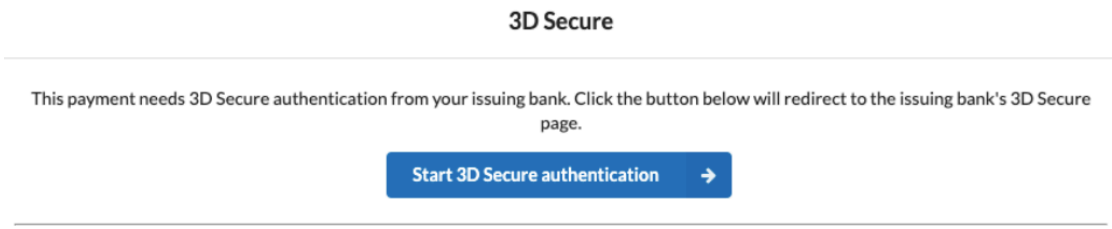


- You can change the settings here, please click [Submit] when it is done. Otherwise, click [Cancel] to cancel all the changes.

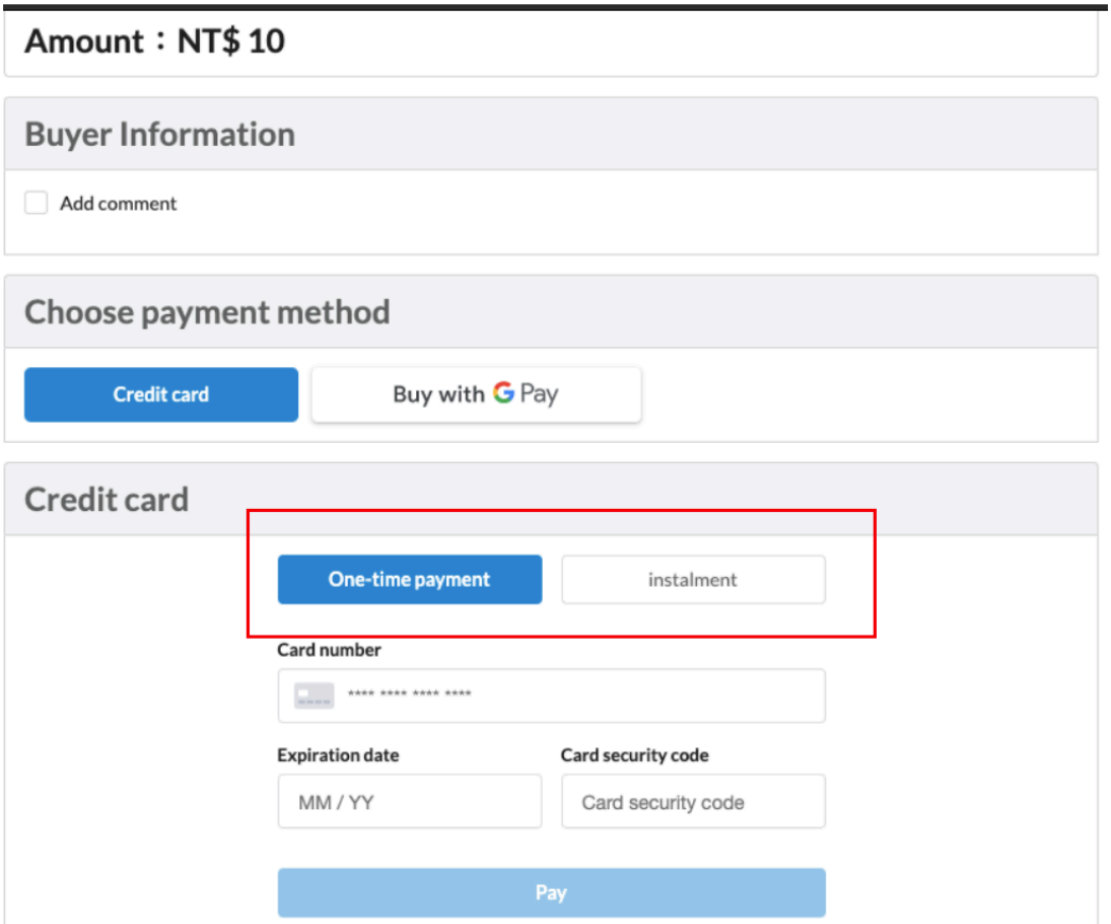
  *Once the settings are changed, they will be applied to all Link Pay that is created later.



- If the select 3-D Secure is selected, consumers will see the following screen when they are making payments.



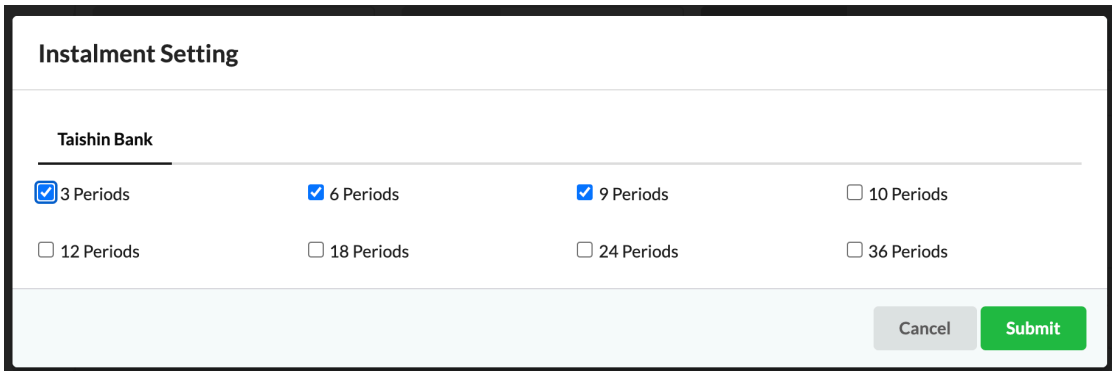
- If the installment is selected, consumers will see the following screen when they are making payments. (consumers can choose between One-time payment or installment).



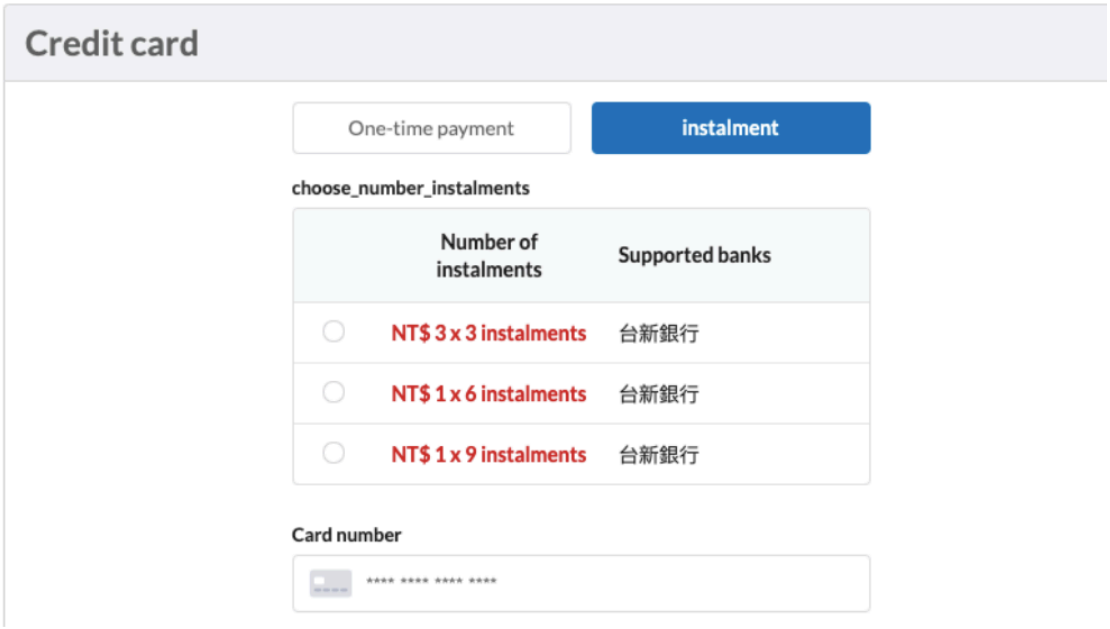
3.12.7.2. How to set up the number of instalments?

- You can set the number of installment options by MerchantID for consumers.

*For example,choose the MerchantID that supports instalment. And then by selecting Instalment setting, you will see a pop-up window where you can select 3,6,9 instalments, and click [Submit].

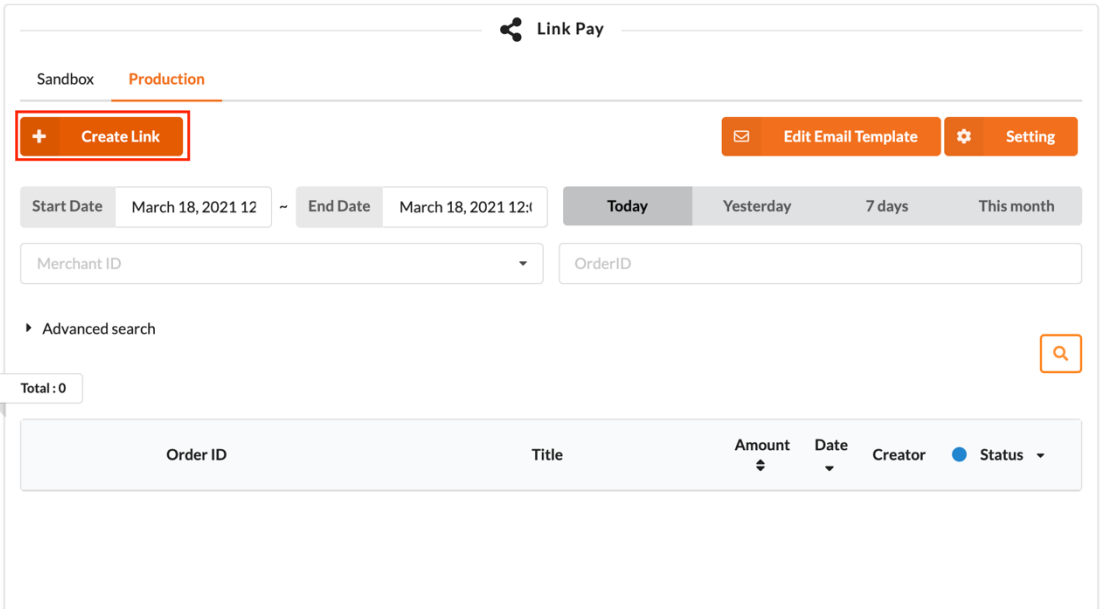


- Consumers can select how many installments they want on the transaction page, shown in the picture below.

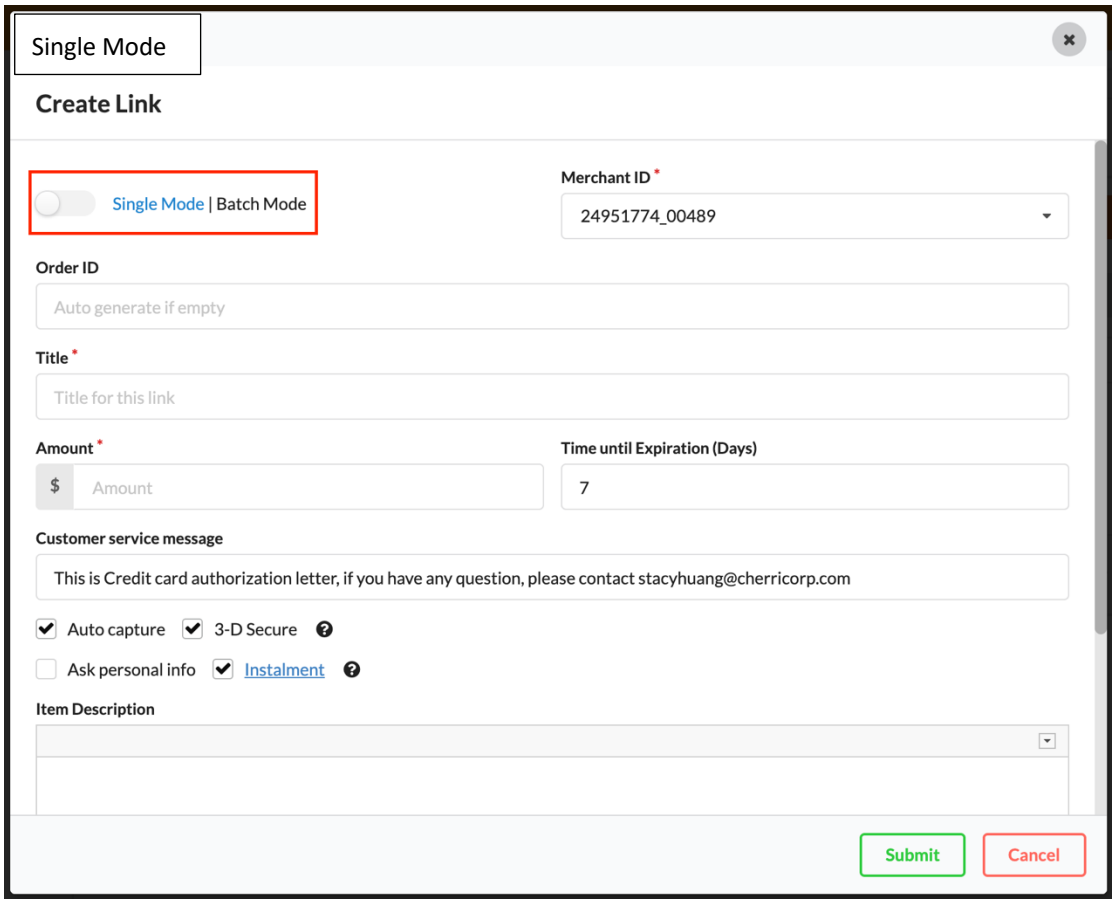


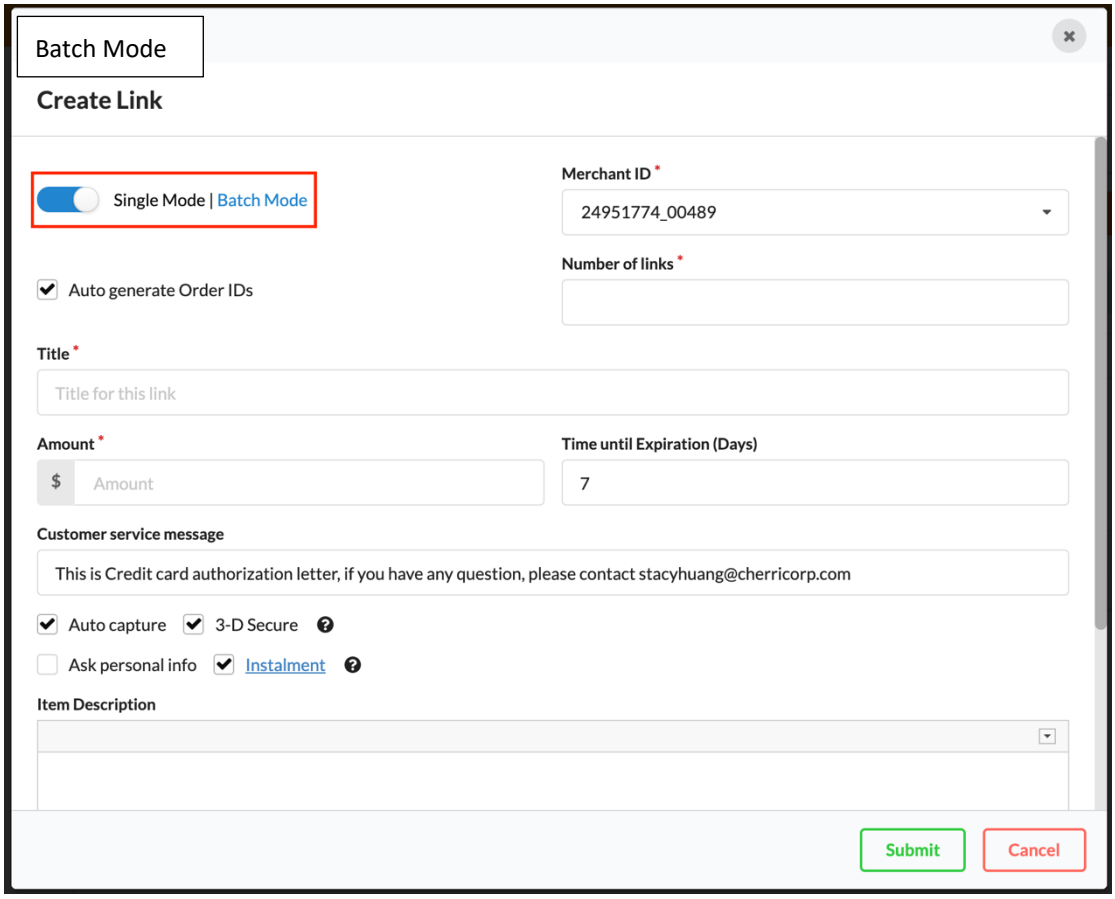
3.12.7.3. How to generate a single payment link or multiple links for an order?

- Click [Create Link]



- You can select between the single mode (generate a single link) or batch mode (generate multiple links at once). Fill in all the information below and [submit].


Single Mode
Create Link
Single Mode | Batch Mode
Merchant ID *
24951774_00489
Order ID
Auto generate if empty
Title *
Title for this link
Amount *
$
Amount
Time until Expiration (Days)
7
Customer service message
This is Credit card authorization letter, if you have any question, please contact stacyhuang@cherricorp.com
Auto capture
3-D Secure
Ask personal info
Instalment
Item Description
Submit
Cancel



- TapPay Automatically generate a link and please fill in the consumer's email.

Click [Edit] and you will be redirected to the email preview, where you can customize the email address of this link (as shown below).

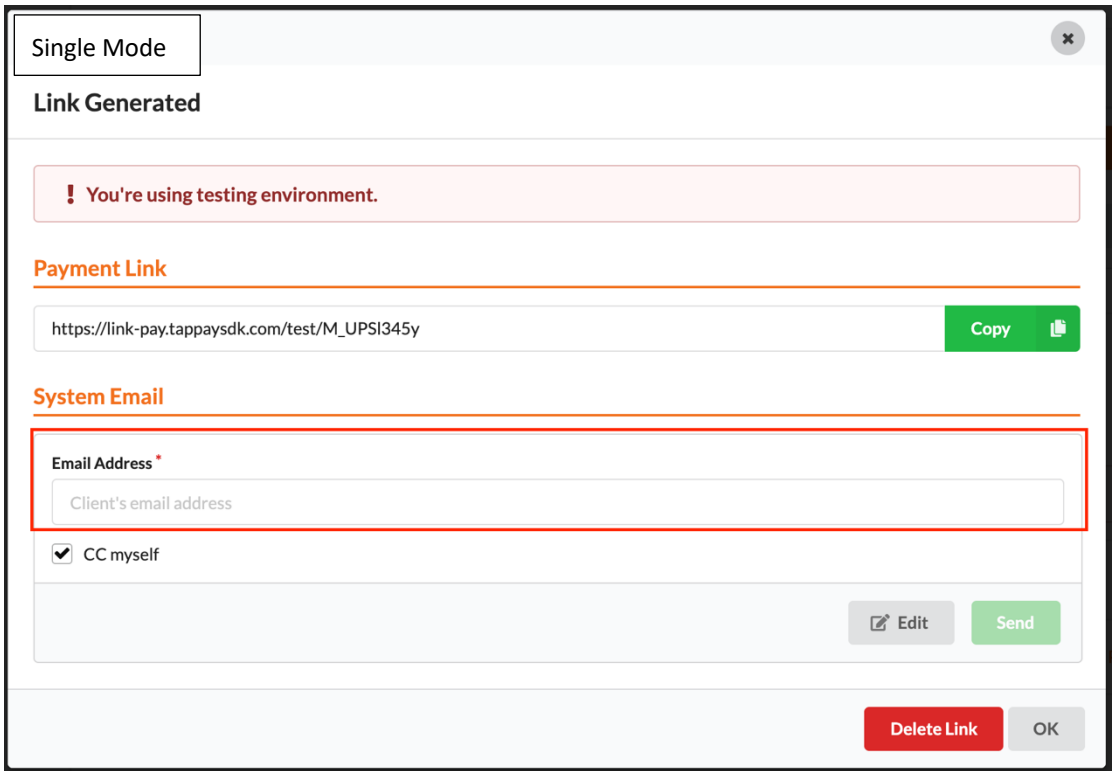
Click [Send] and the system will automatically send an email for you.

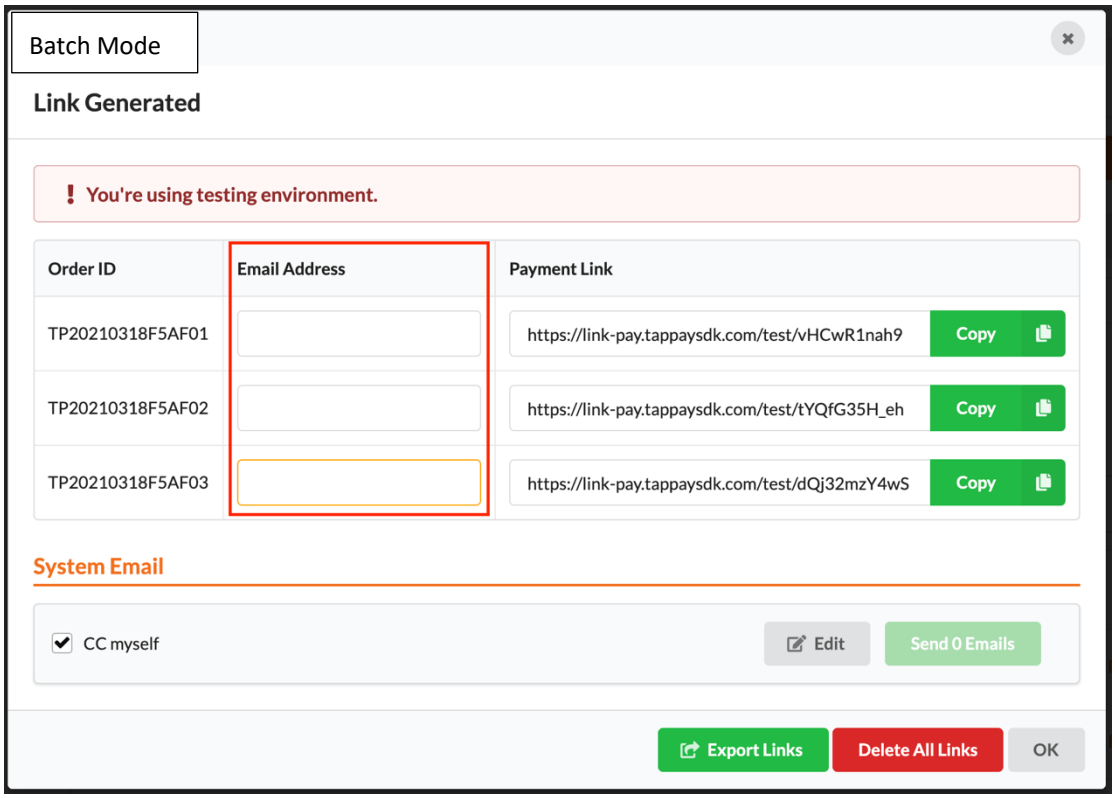
Click [Copy] to copy the payment link.

Click [Delete Link] to delete the information of this order.

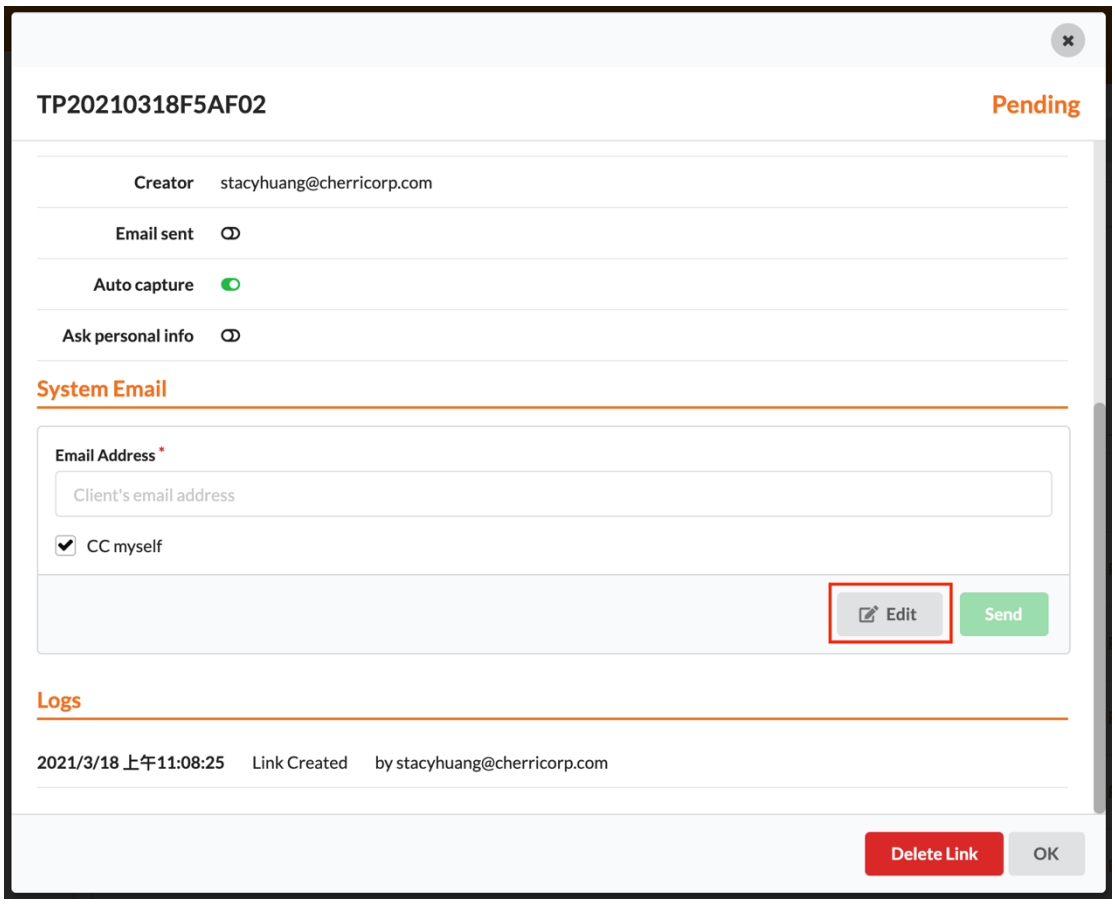
Click [Export Links] to export the links to a CSV file.

Select [CC to Yourself], it will send the email to the sender at the same time when the link is sent to the consumer.

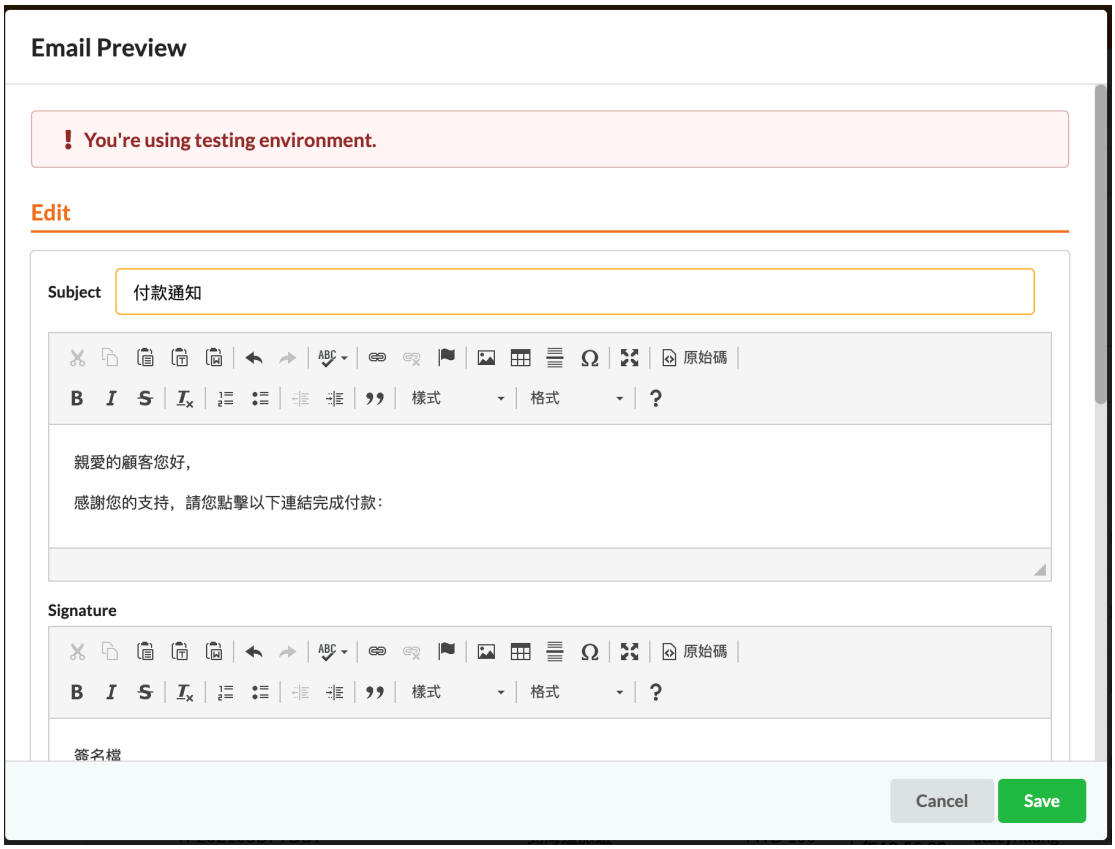




- If you want to edit the email content for a certain order, please click one of the orders and click[edit].

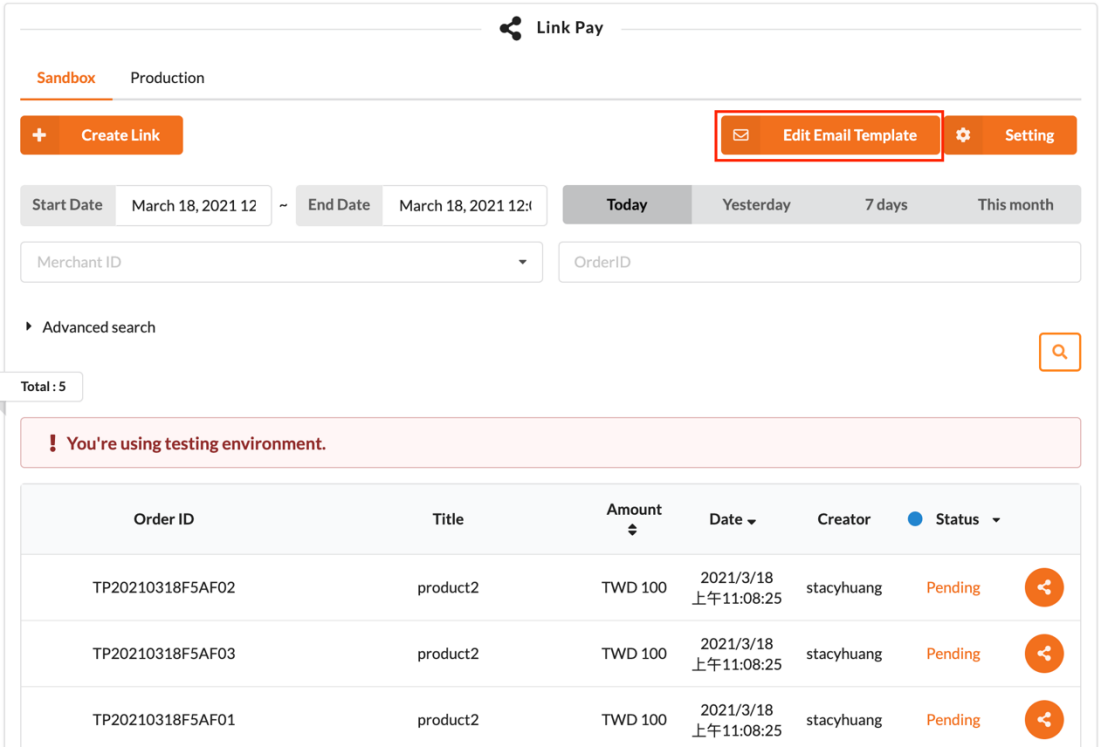


- You can edit email content here.


Email Preview
You're using testing environment.
Edit
Subject
付款通知
原始碼
樣式
格式
親愛的顧客您好,
感謝您的支持，請您點擊以下連結完成付款:
Signature
原始碼
樣式
格式
簽名檔
Cancel
Save

3.12.7.4. How to edit email templates for all orders?

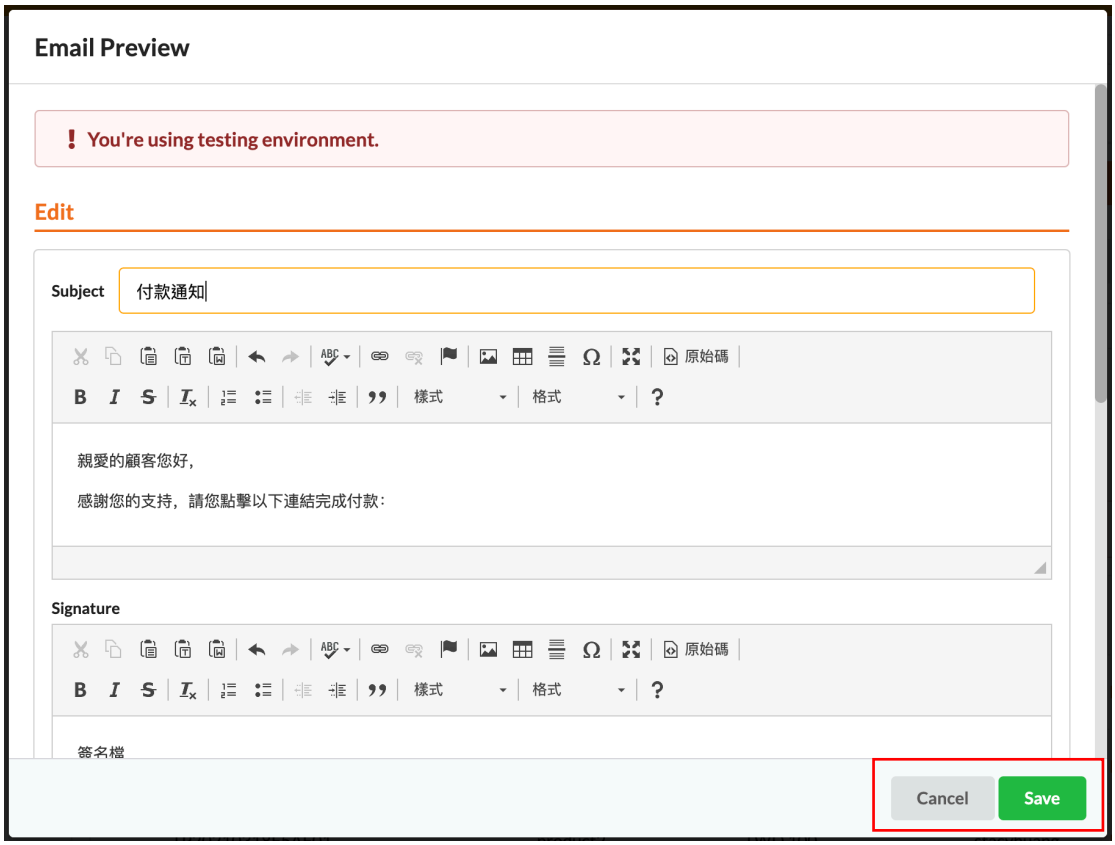
- Click [Edit Email Template] at the top right corner.



- You can edit the email content.

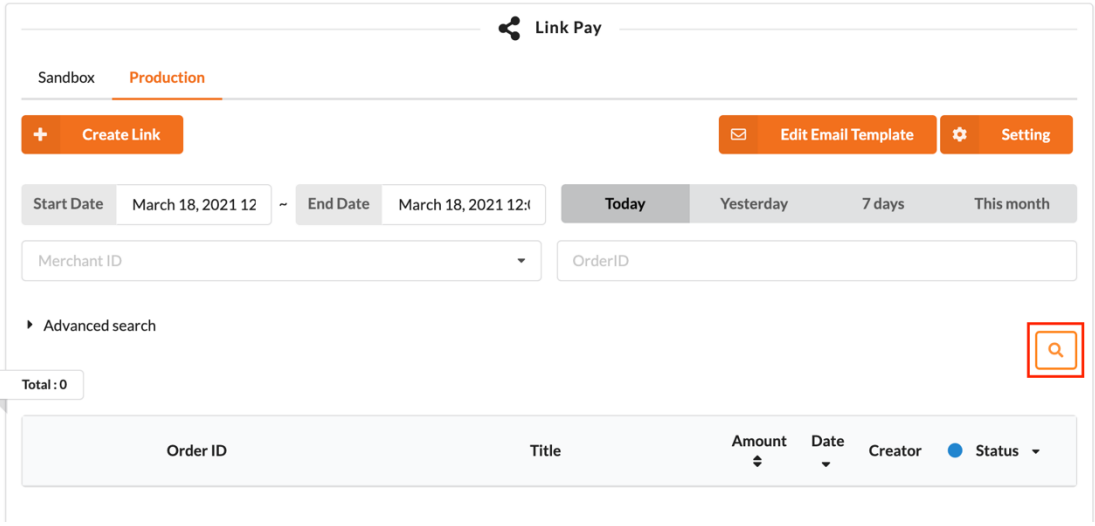
*When editing content, if you want to change back to the default content after editing, you can click [Reset] to cancel all the changes you just edited and reset it back to the default content.

After finishing editing, click [Save], otherwise click [Cancel].



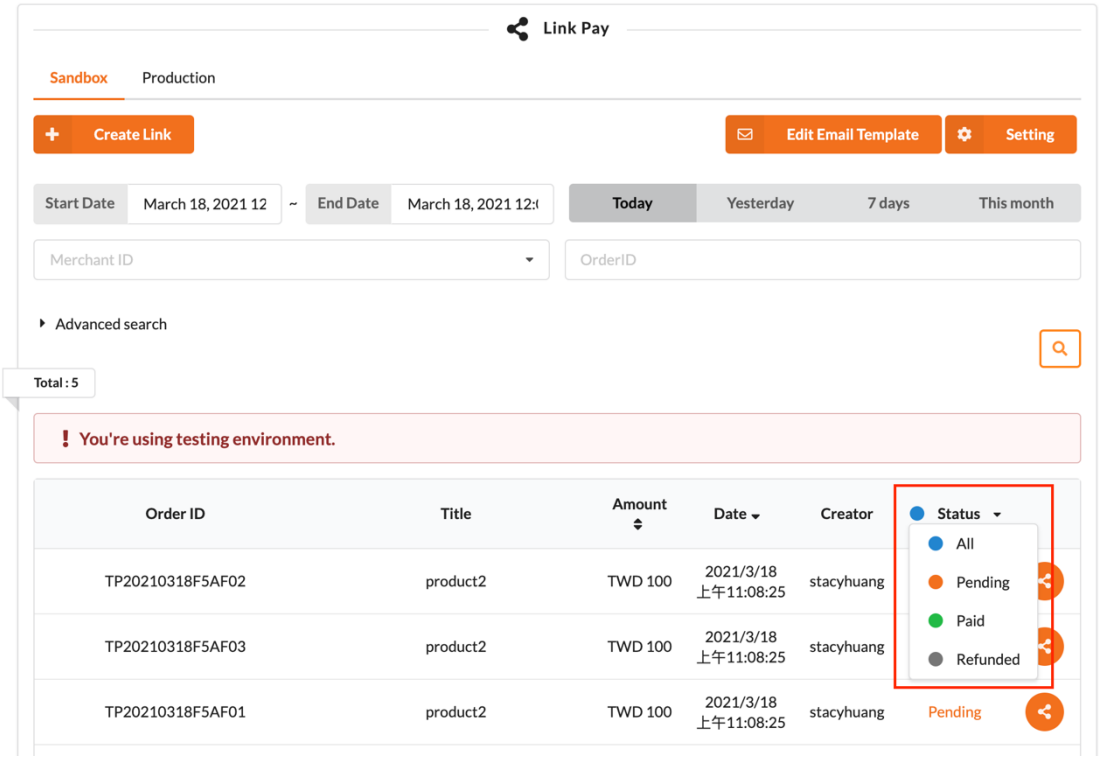
3.12.7.5. How to search for the order?

- You can quickly find the order you're looking for by time / Merchant ID / Order Number, or by advanced search criteria. After selecting the search criteria, click [search].



3.12.7.6. How to check the status of orders?

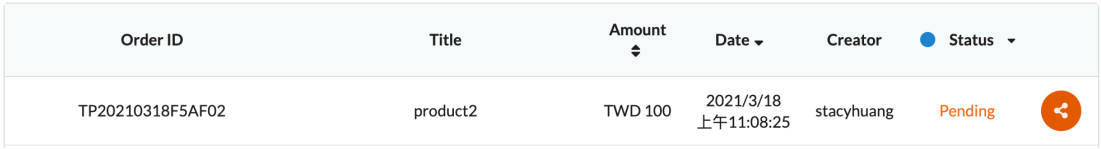
- You can see in the last field "Status" in the order list to know the current Pending/ Paid/ Refunded status.



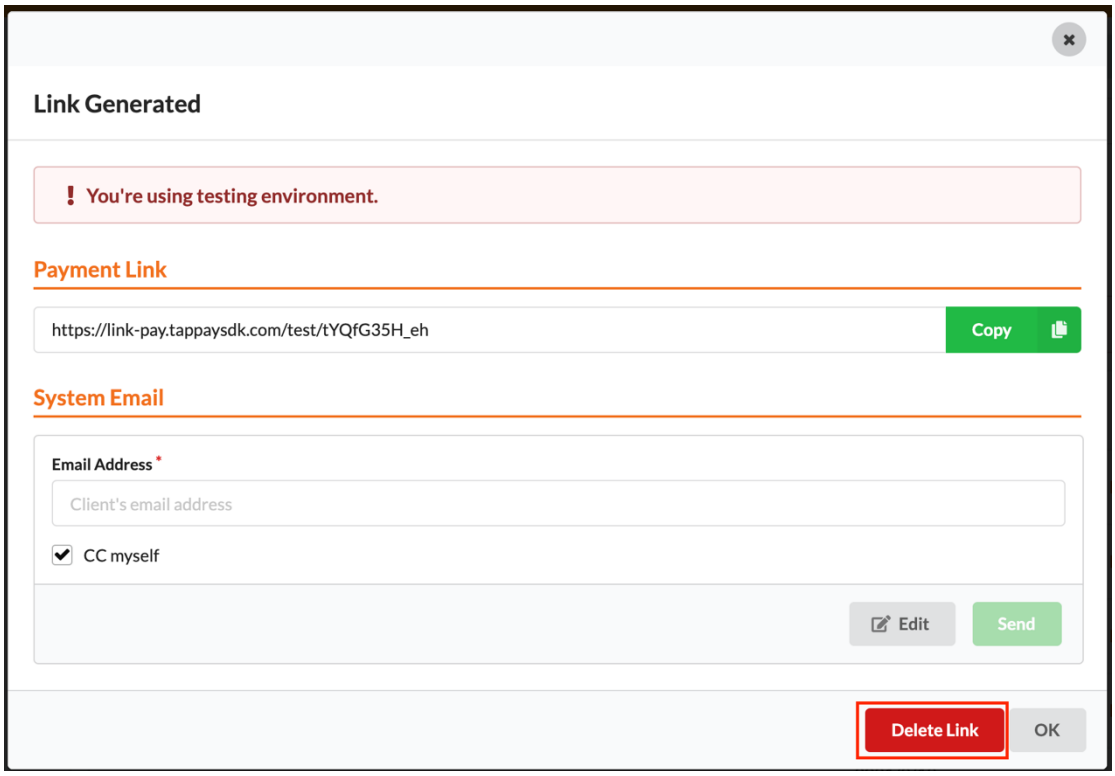
3.12.7.7. How to delete an order?

* Note: You can only delete an order when the status is still Pending.

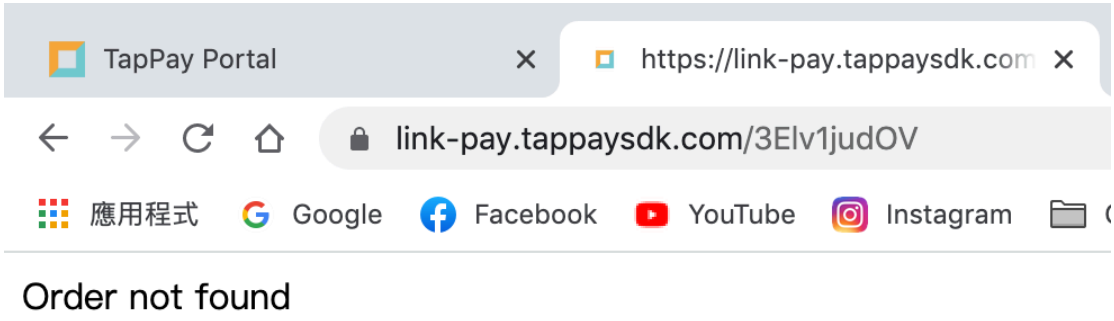
- Click the rightmost button [ ].



- Click [Delete Link]

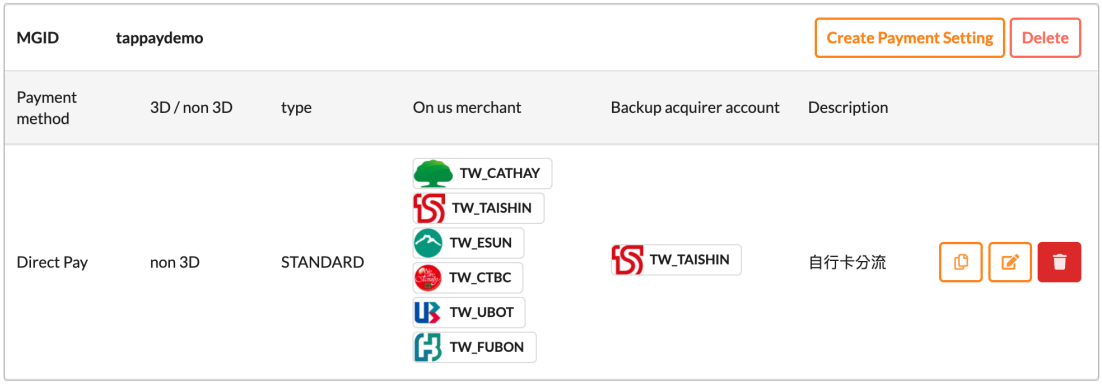


- When a consumer receives the email and clicks on the link, an Order Not Found message will pop up. (The item does not exist, and cannot be ordered. As shown in the picture below)



3.12.7.8. How to Create a MGID's Order with on-us Merchant Setting

- Go to Merchant > MGID Setting, and create a MGID as below:



- Go to Link Pay, click [Create Link] and choose the MGID you just created. According to the MGID Setting, if the consumer pay by CATHAY, TAISHIN, ESUN, CTBC, UBOT, or FUBON card, the payment will go to the on-us acquirer. Otherwise, it will go to TAISHIN Bank(Backup Acquirer).

（圖片）

3.12.7.9. How to Create a MGID's Order with 3D and Instalment Settings

- Click [Create Link] and choose a MGID. If the MGID contains 3D-Secure or Instalment Payment Setting, the checkbox of these two settings can be turned on.
- If this is a 3D order, please turn on 3-D Secure. If this order can be paid by instalment, please turn on Instalment.
- At the last step, please click [submit]. If we cannot find the payment setting according to your 3D and instalment settings, the alert will be shown as below:

＊No matching 3D Secure and Instalment Setting in your MGID

3.12.7.10. How to Create a MGID's Order, and Show Supported Banks of Instalment on Checkout Page

- Click [Create Link] and select MID. Choose NCCC as your acquirer.

[圖片]

- Select [Instalment] and choose your contracted issuers with NCCC and supported periods.

[圖片]

- When the order is created, you can click the link and view in the instalment section where issuers and supported periods are shown according to your setting.

[圖片]

3.12.7.11. How to Create a MGID's Order, Which Supports Instalment for Multiple Banks

- Click [Create Link], select MGID and choose a MGID that contains an installment payment setting with multiple acquirers.

[圖片]

- Please turn on [Instalment] and set up periods for each acquirer. If you choose NCCC, GP or NewebPay, please make sure to select your contracted issuers with periods(mandatory).
  [圖片]
- When the order is created, you can click the link and view in the instalment section where issuers and supported periods are shown according to your setting.
  [圖片]
- You should notice that in a MGID, if your selected on -us acquirer is the same as your supported issuer, in this case only the period setting of the on-us acquirer will be shown on the checkout page.
  [圖片]

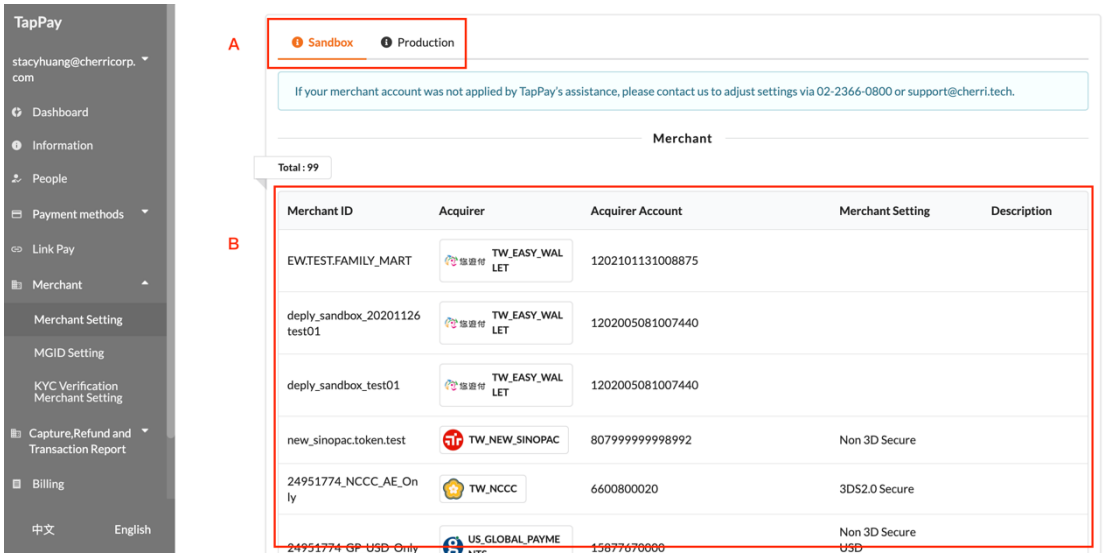
3.13. Merchant Management—Merchant Settings

3.13.1. Function Description

This function has both a testing environment and a production environment, where you can create acquirer accounts for the acquiring banks.

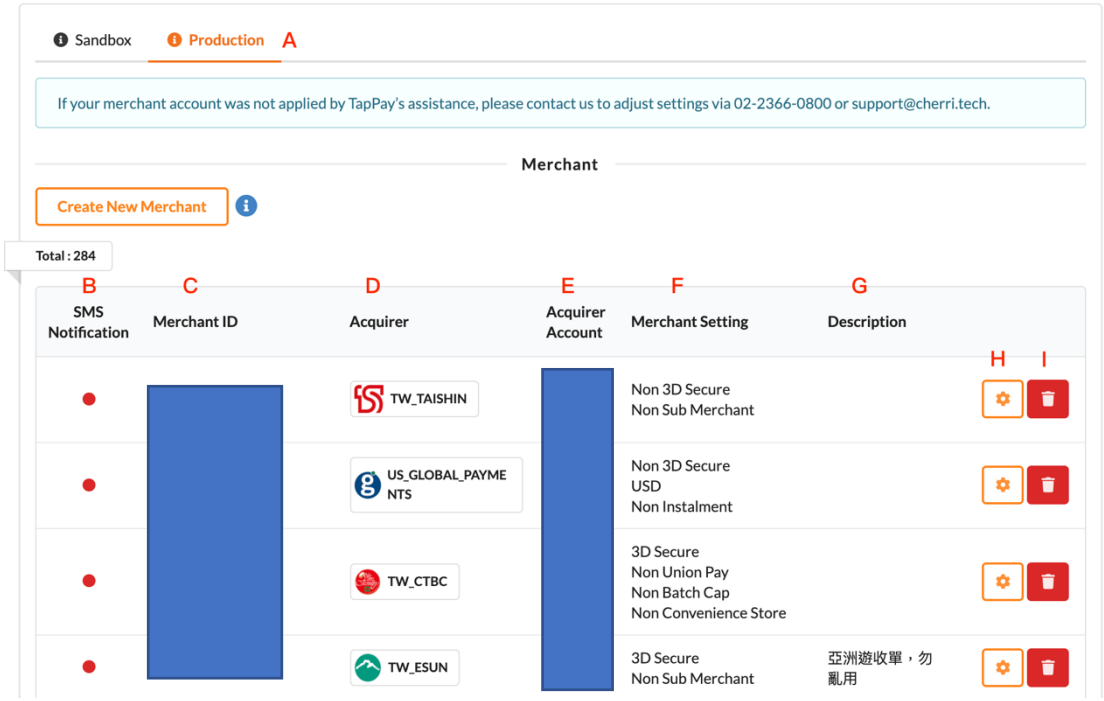
- Testing Environment: There will be a default test account for integration testing, and the test transactions will not be sent to the banks.
- Production Environment: You can create real acquirer accounts for acquiring banks.

3.13.2. UI Demo—Testing Environment



No.	Function	Description
A	Sandbox/Production	Switch between sandbox/production
B	Testing acquirer account	TapPay provides the accounts for testing

3.13.3. UI Demo—Production Environment

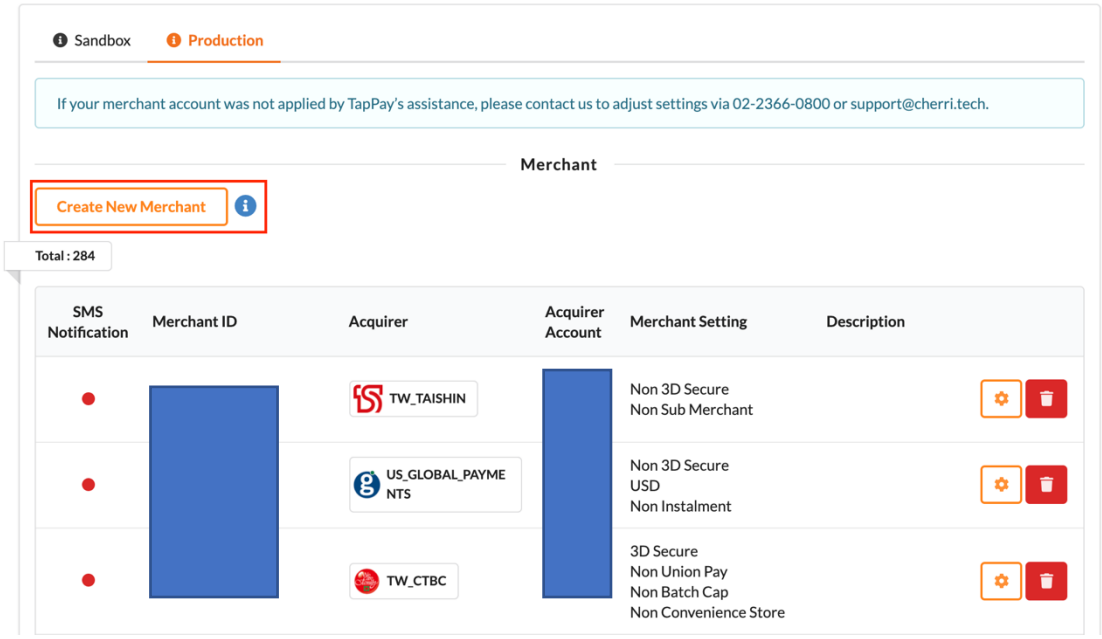


No.	Function	Description
A	Production	Production environment
B	SMS notification	Green: active Red: inactive
C	Merchant ID	Automatically generated
D	acquirer	Show your acquirer
E	Acquirer account	Provided by banks
F	Merchant setting	Relevant settings
G	Description	You can add comments here
H	Notification and description edit	Click to edit
I	Delete button	Delete the merchant setting

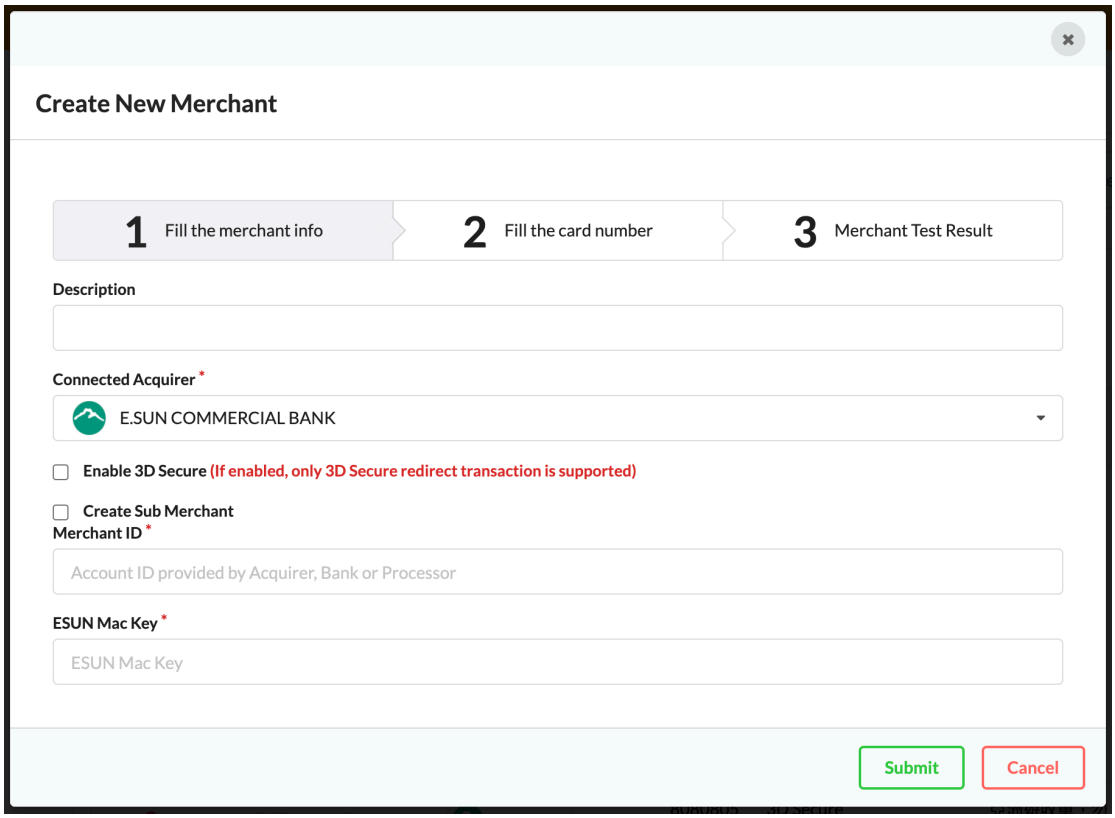
3.13.4. Operating Instruction

3.13.4.1. How to create a new merchant?

- Click [Create Merchant]

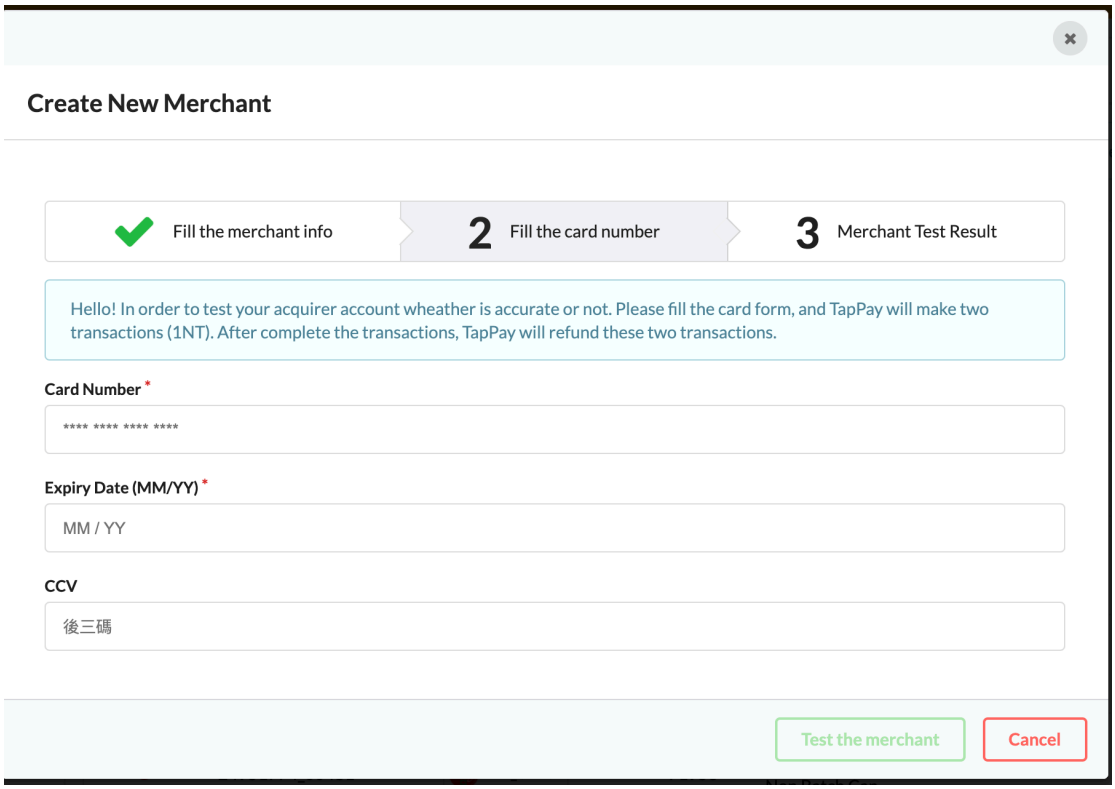


- Select your acquirer and fill in the acquirer account information.

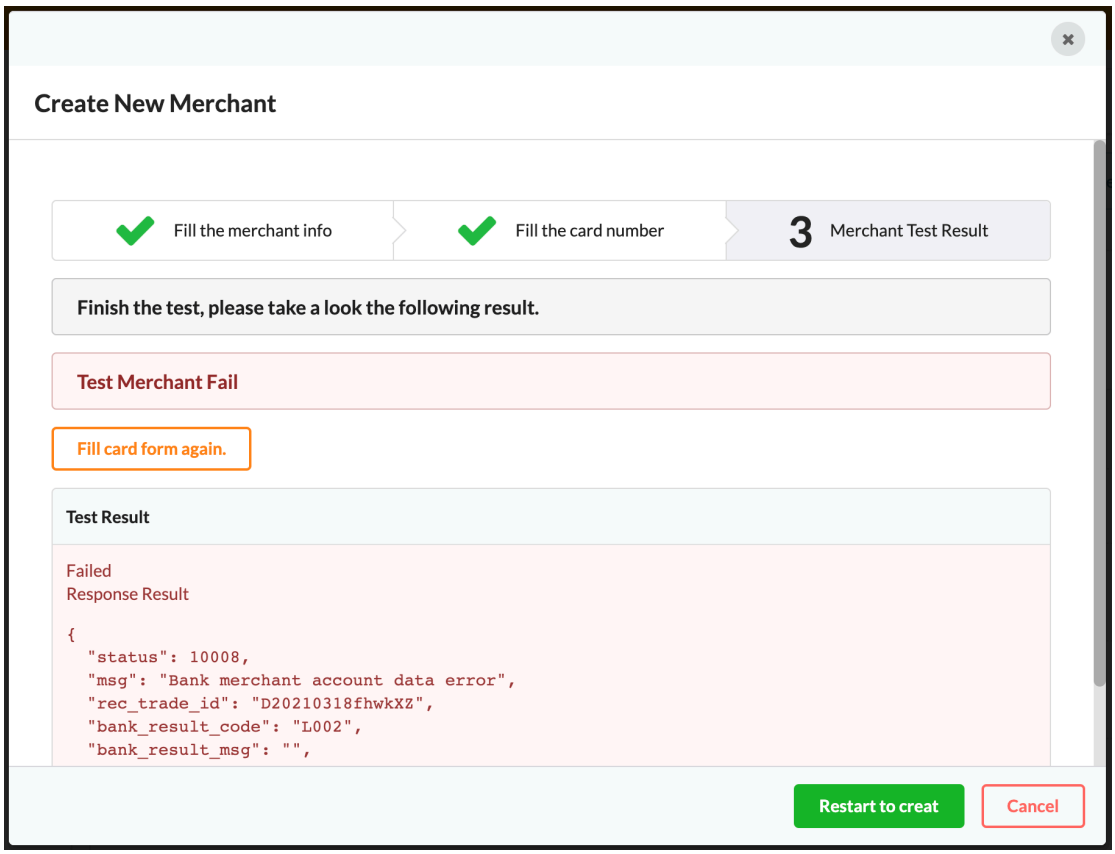


- After entering and confirming the merchant information, click [Submit] to proceed to the second step. Input the card information and click [Test].

*To make sure the acquirer account information you just entered is correct, we will do a one-dollar transaction test and refund immediately after the test is completed.

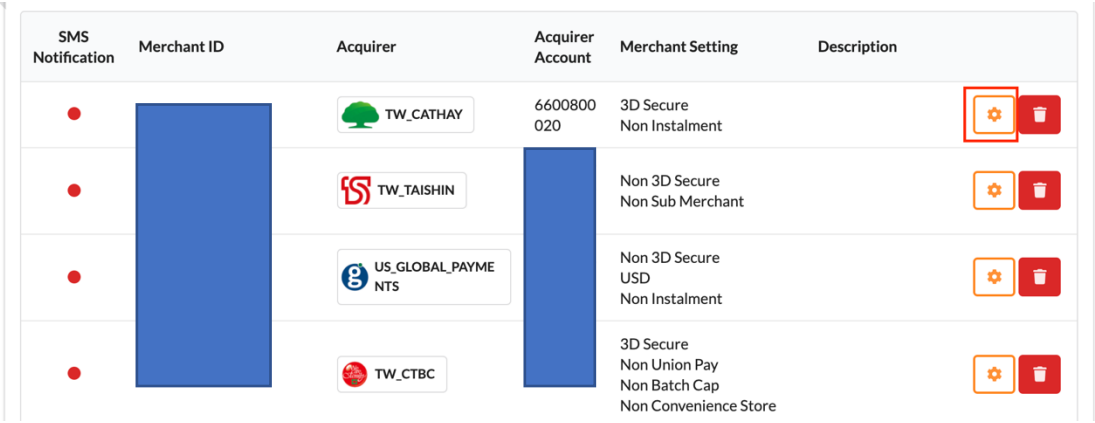


- If the test fails, an error message will be displayed on the screen (as shown below) and you can click [Re-create] to enter the information again. If the test is successful, it will be created immediately and you will see the newly added merchants on the screen.

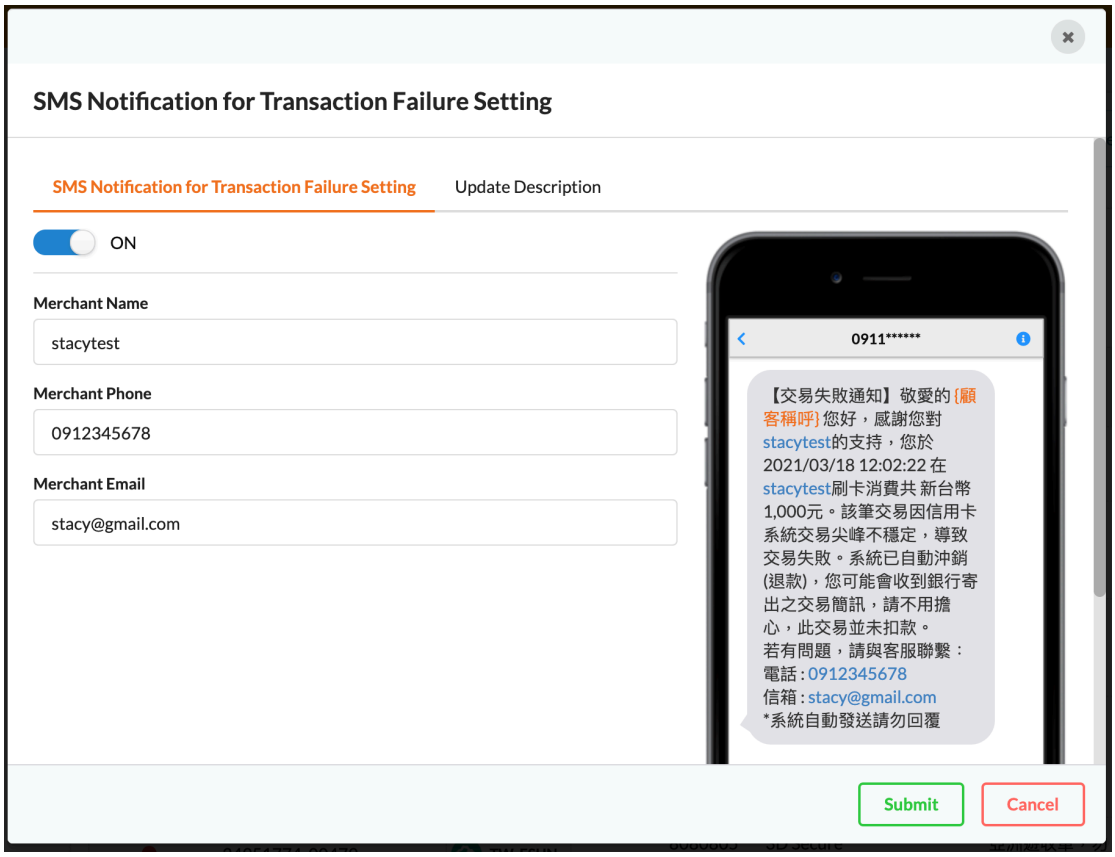


3.13.4.2. How to turn on SMS notification?

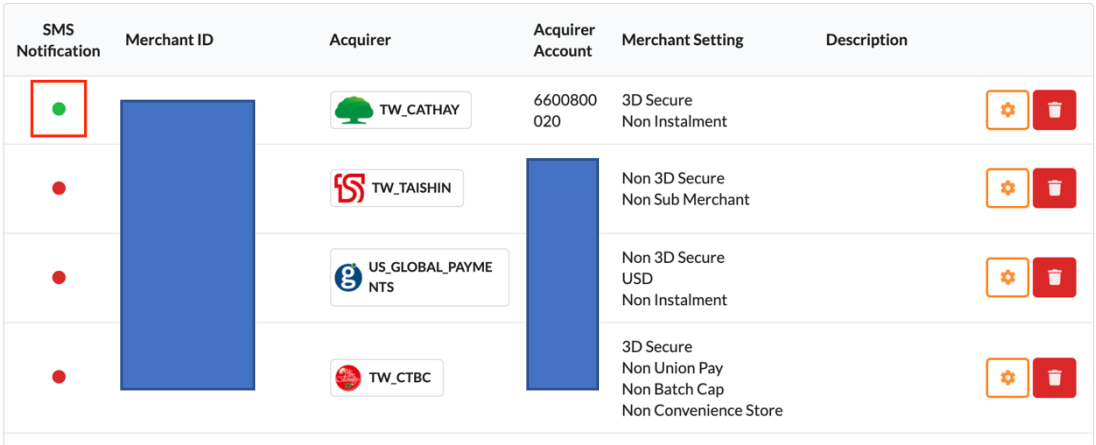
- For acquirer accounts, if you want to automatically notify a consumer of a failed transaction, you can click the setting button on the right.
  Take the following acquirer account “6600800020” as an example, the status of SMS notification is currently OFF.



- Click "Setup SMS Notification for Failed Transaction" to turn on. Fill in Merchant Name, Phone, and Email, and then click [Submit] to immediately update.

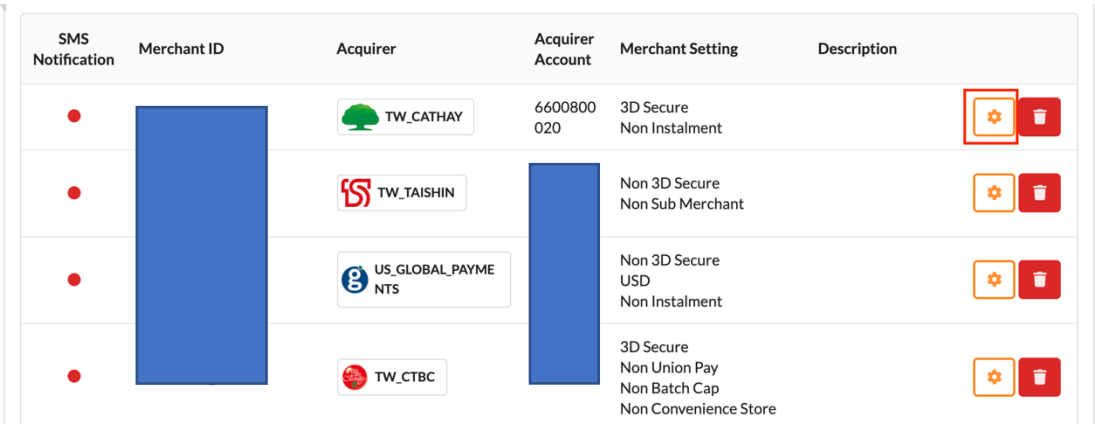


- You will see that the acquirer account “6600800020” has turned on the SMS notification

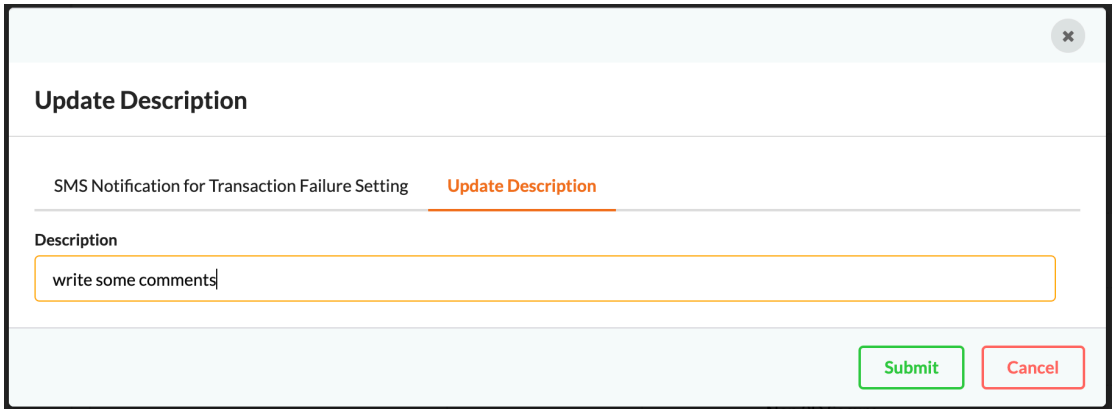


3.13.4.3. How to edit the description?

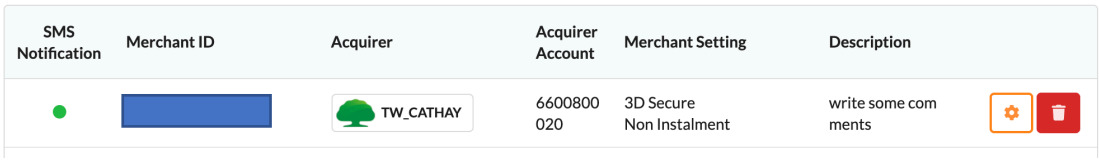
- if you want to modify the description for an acquirer account, you can click the [Setting] button on the right. Take Acquirer Account “6600800020” for example, the column of the description is now empty.



- Click [Edit Description] to edit the description as follows, and click [Submit] to update immediately.

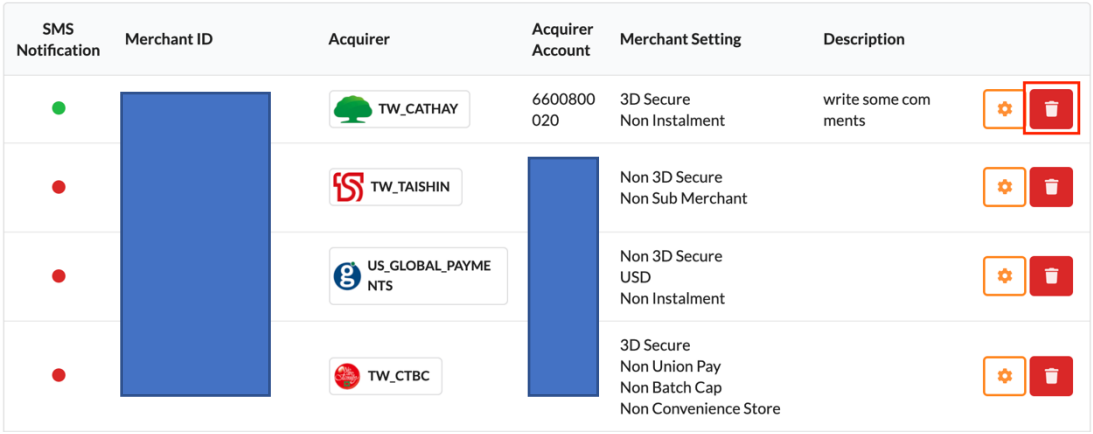


- The description is updated as below.

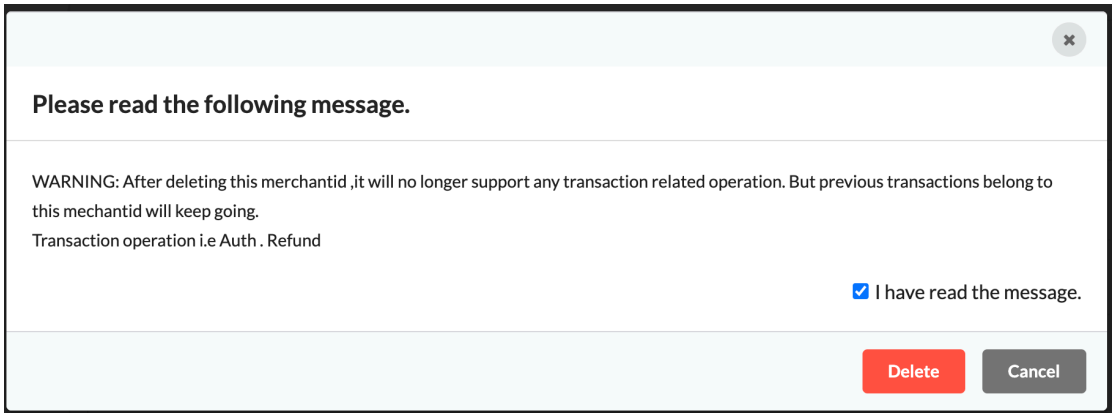


3.13.4.4. How to delete a merchant?

- If you want to delete a merchant (e.g., acquirer account “6600800020”), click the [Delete] button on the rightmost side.



- A confirmation window will pop up. After confirming the deletion, select "I have read the information" to be able to click [Delete], otherwise click [Cancel] to cancel the deletion.



3.14. Merchant Management - MGID Settings

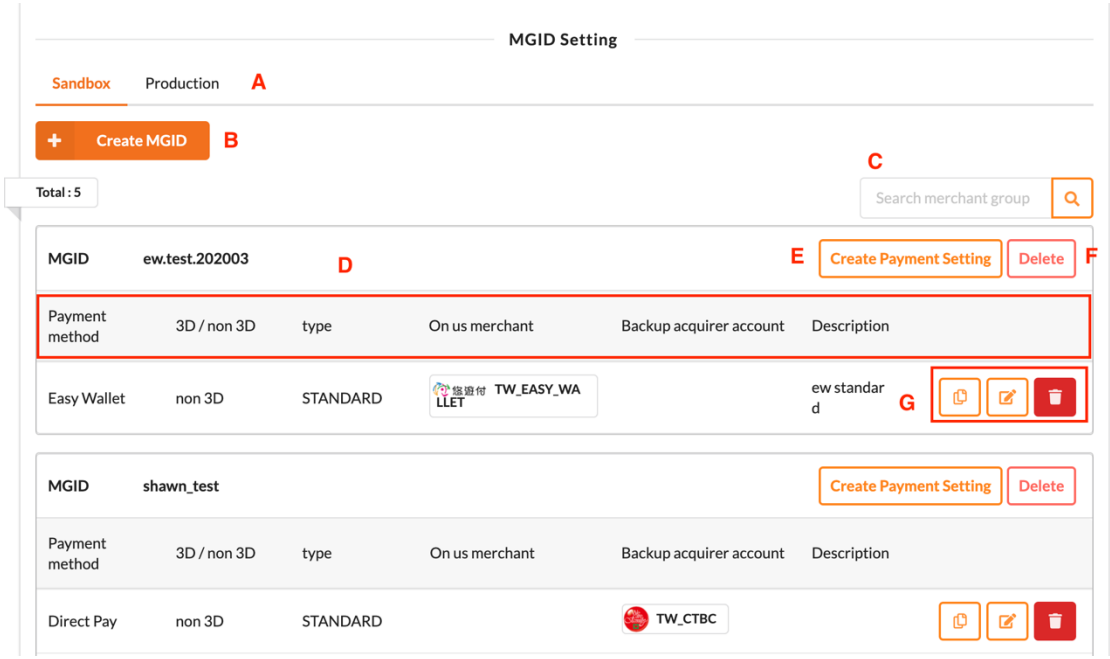
3.14.1. Function Description

- You can set up MGID (Merchant group id) containing multiple payment settings. TapPay will automatically send these transactions to different acquirer accounts according to payment settings for further processing (see Scenario 1).
- When you set up on-us merchants, TapPay will automatically send your purchases to the card acquirers according to the cards in current use (see Scenario 2).
- When you set up a backup acquirer account, any transactions made with a card other than the cards that already in on-us merchants will be directly transferred to the backup acquirer for the transaction processing (see Scenario 2).

Scenario 1:
There are multiple merchant IDs: 3D Installment (merchantID : A), Non-3D Bonus (merchantID : B), 3D Standard (merchantID : C), Non-3D Installment (merchantID :D) When making a 3D installment transaction
Before using MGID:
You have to match (merchantID: A) by yourself. If there is a mistake, the transaction will be failed.
After using MGID:
You just need to set up an MGID containing multiple payment settings, fill in the information of each payment settings, and select the corresponding merchant ID. When you make a transaction, you just need to use this MGID and TapPay will automatically match the merchant ID for you according to the different payment methods, so you don't need to worry about matching the wrong merchant ID. => TapPay will automatically send the transaction to “merchantID: A” for you.
Scenario 2:
Create a set of payment settings. Taishin bank and E.Sun bank are the on-us merchants.
No backup acquirer account
When a consumer uses Taishin card, TapPay will automatically send the translation to Taishin acquirer.

When a consumer uses E.Sun card, TapPay will automatically send the translation to E.Sun acquirer When the consumer uses the Cathay card, the transaction fails.
Add a backup acquirer account
Backup acquirer account: CTBC When a consumer uses Taishin card, TapPay will automatically send the transaction to Taishin acquirer. When a consumer uses E.Sun card, TapPay will automatically send the transaction to E.Sun acquirer. When consumers use Cathay card, TapPay will automatically send the transaction to the back acquirer (CTBC).

3.14.2. UI Demo

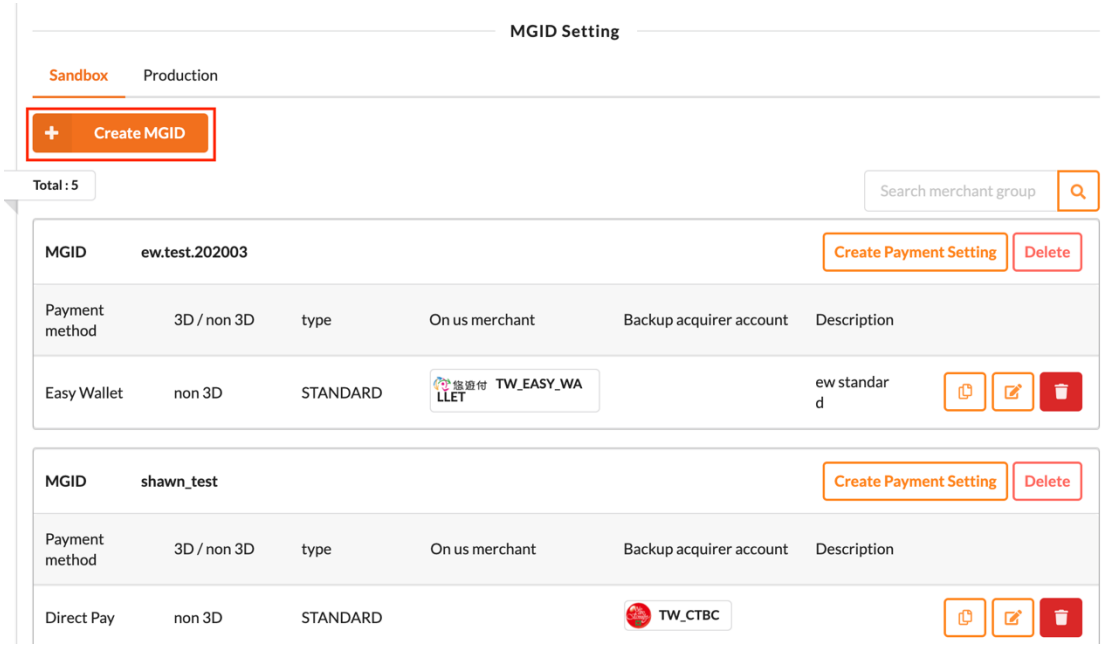


No.	Function	Description
A	Sandbox/production	Switch between sandbox and production
B	Create MGID	Click to create a MGID
C	Search for MGID	Search for MGID under certain criteria
D	MGID information	Show the MGID created
E	Create Payment Setting	Add a payment setting to the MGID
F	Delete MGID	Delete a MGID
G	Other operations	Copy/edit/delete payment setting

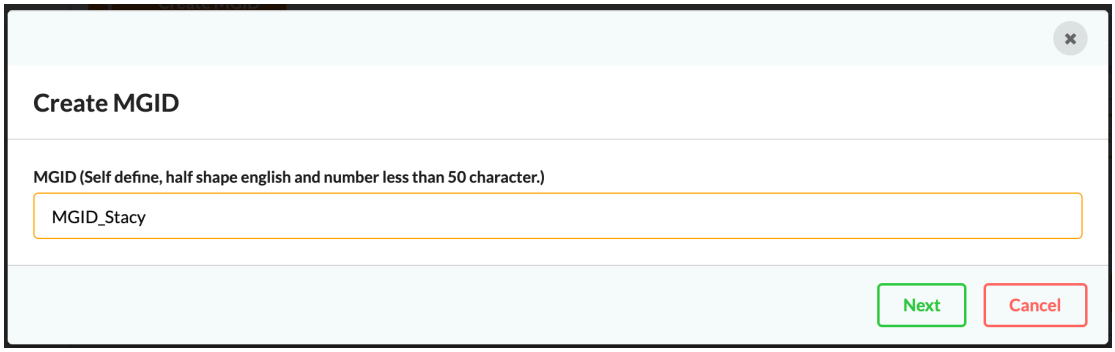
3.14.3. Operating Instruction

3.14.3.1. How to create MGID?

- Click [Create MGID]



- Enter the name of the MGID and click [Next].



- Set up a set of payment settings. After finishing, click "Please read the following information first" to be able to click [Submit].

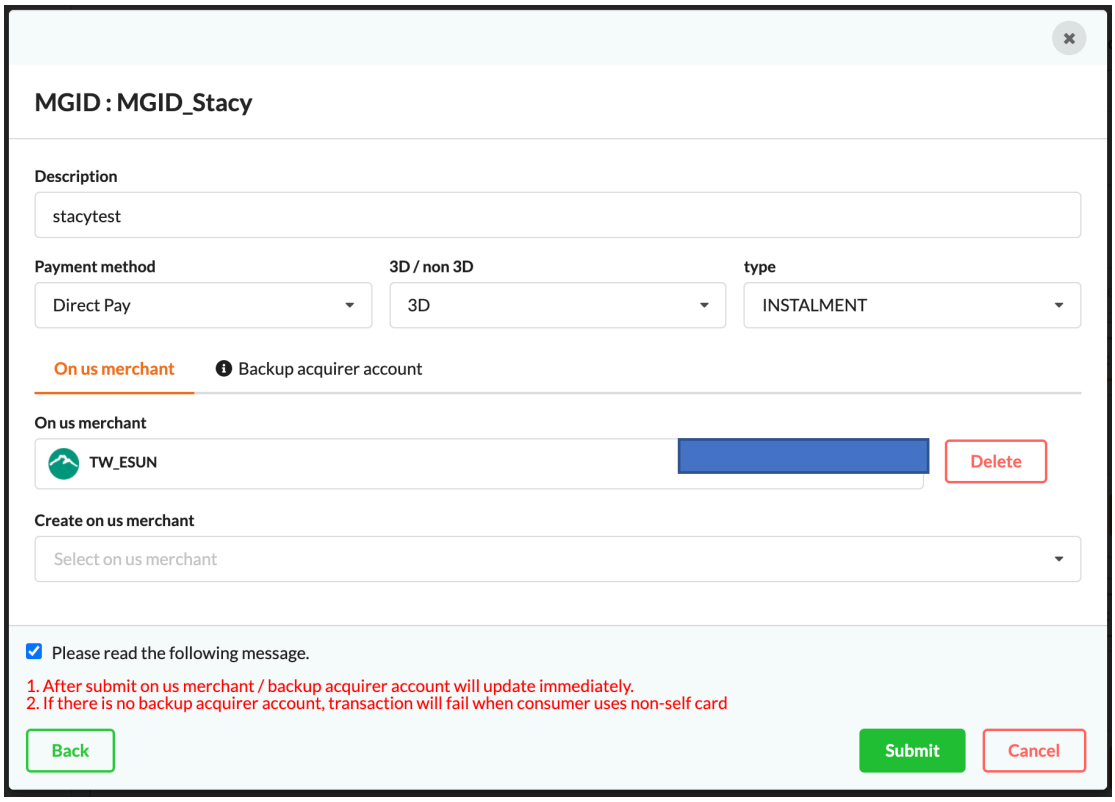
*If you need to change the MGID name, please click [Back] to change, otherwise, the MGID name will not be able to be changed again once it is created.

*Payment Method: The payment method that TapPay support

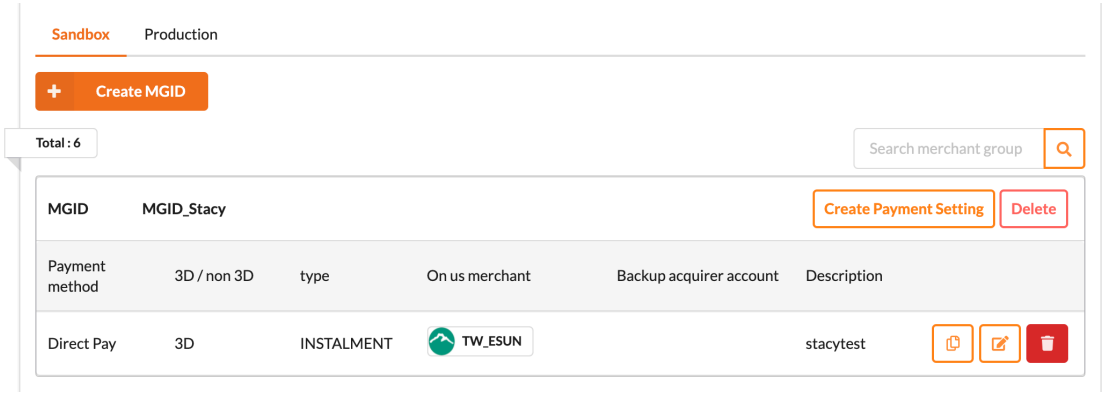
3D / non-3D, Standard, Bonus, Installment

*Non-Direct Pay only supports the non-3D + Standard payment method.

*There must be at least one on-us merchant or backup acquirer, otherwise, the payment setting cannot be created.

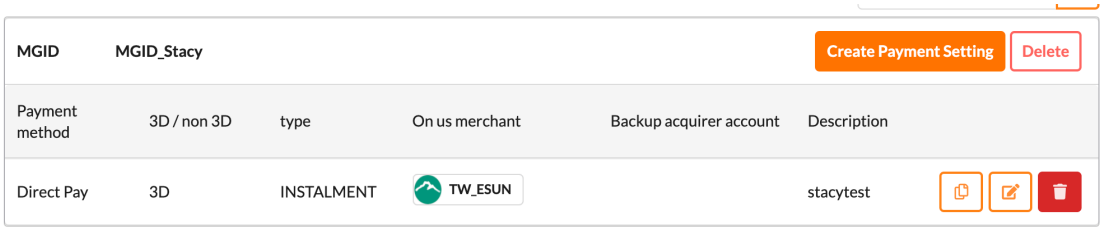


- Once created, you will see the newly created MGID in the first record of the first page.



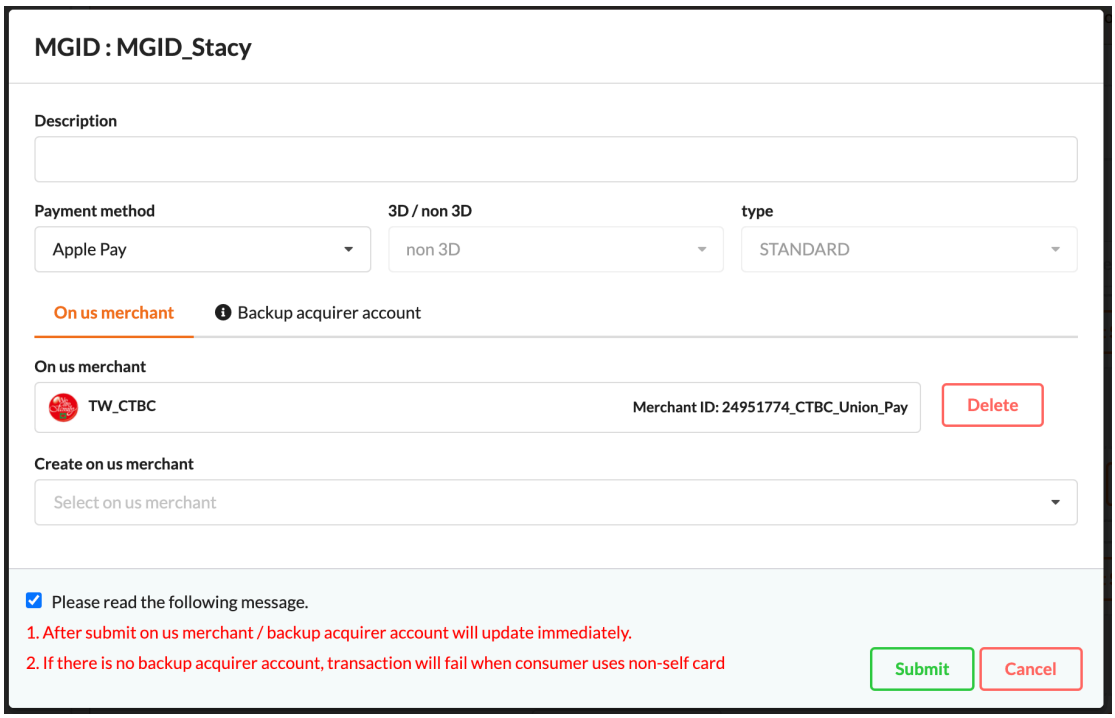
3.14.3.2. How to create a payment setting?

- If you want to create a payment setting for your MGID, please click [Create Payment Setting] in the MGID. (Take the newly created MGID_Stacy as an example)

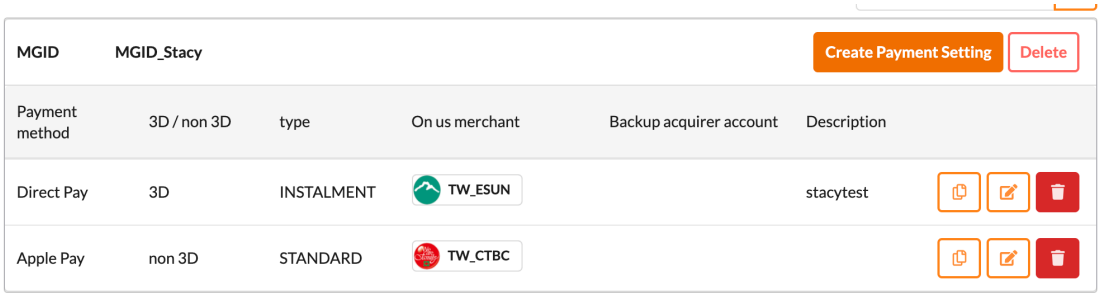


- Create a payment setting and fill in the information. Click [Submit] when it's done.

*The payment settings cannot be duplicated under the same MGID. (e.g., If you have already set up a Direct Pay + 3D + Installment, you cannot add another Direct Pay + 3D + Installment payment setting.)

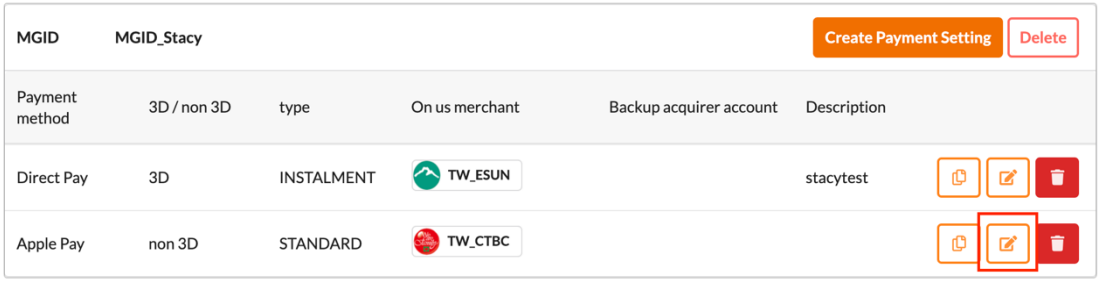


- You can immediately see the newly added payment setting (Apple Pay + Non-3D + Standard) under MGID_101010

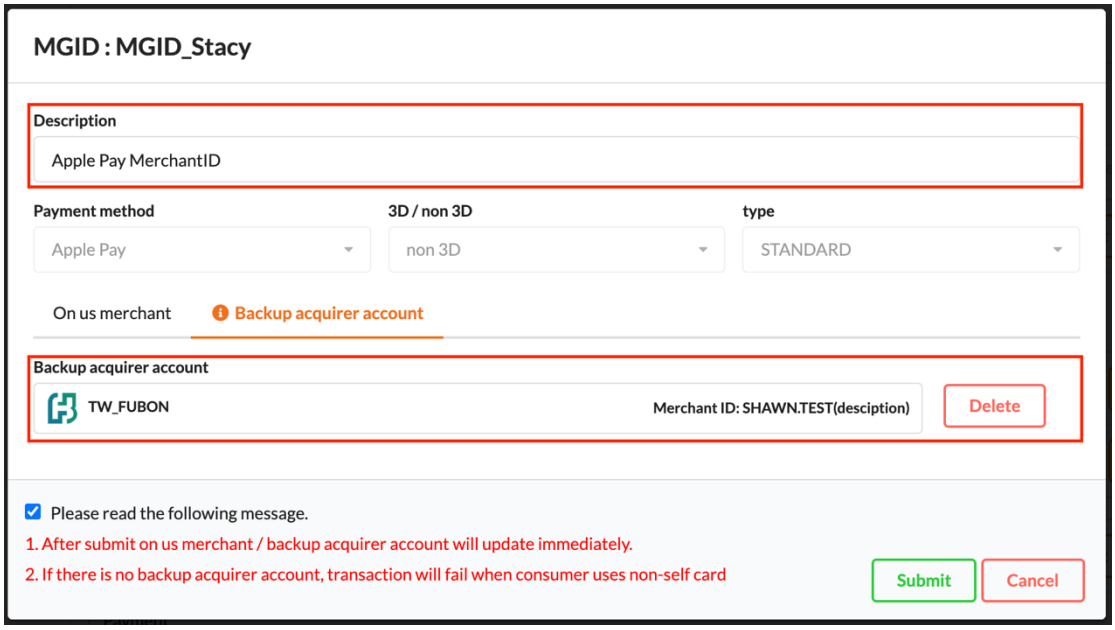


3.14.3.3. How to edit payment settings?

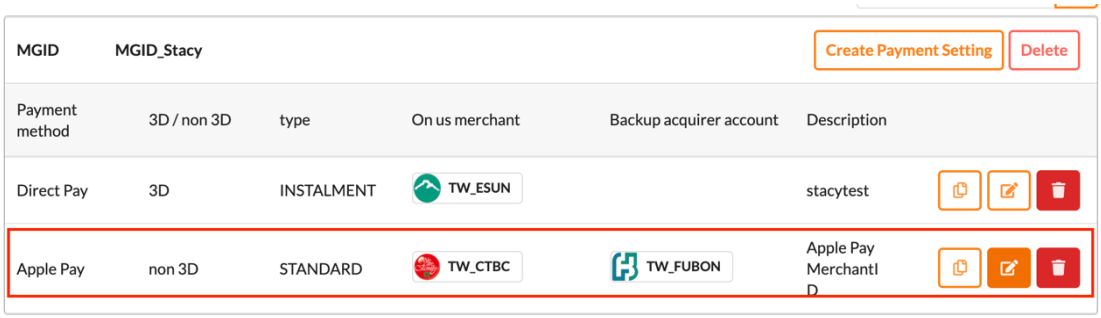
- If you want to edit the payment settings, click [Edit] on the right side of the payment setting record. (Take the MGID_Stacy payment setting (Apple Pay + Non-3D + Standard) as an example.)



- You can change the description, on-us merchant, and backup acquirer account. Click [Submit] when the editing is done. For example: Add a description, change the on-us merchant to E.Sun Bank and add a backup acquiring account.



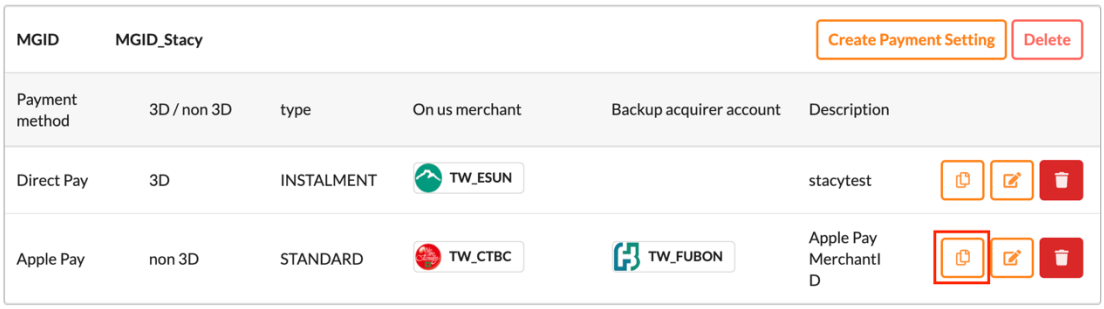
- The information is updated immediately as below.



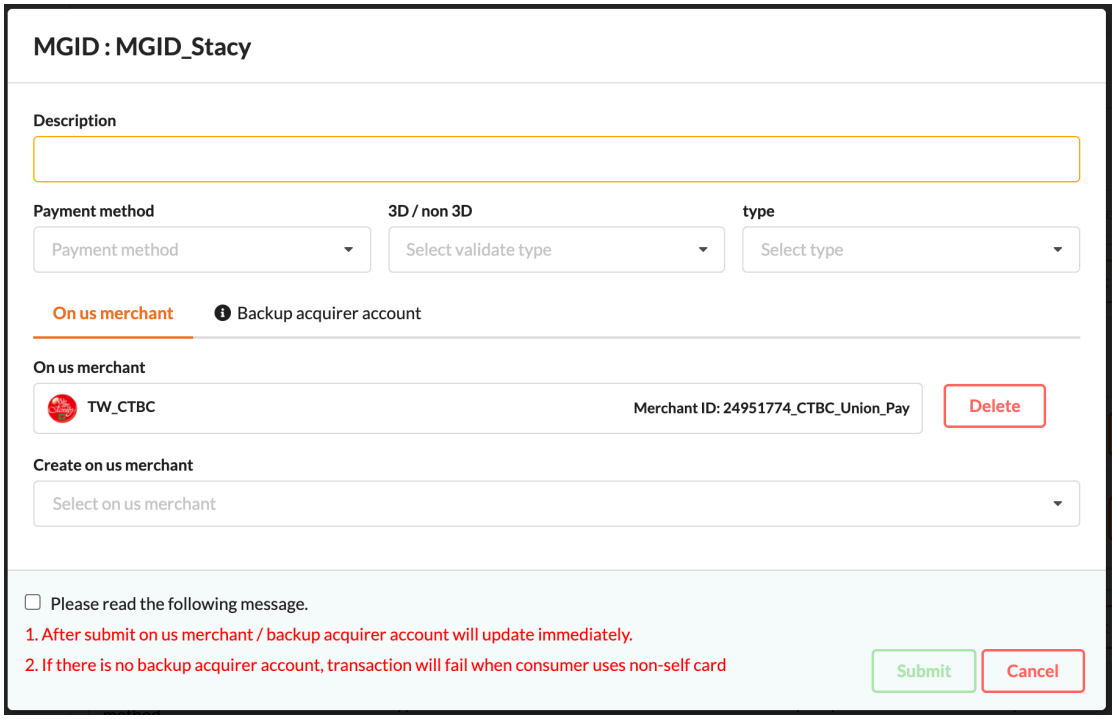
3.14.3.4. How to quickly copy an existing payment setting?

*If you want to create a new payment setting and the information of the on-us merchant/ backup acquirer account is the same as another payment setting. How to quickly set it up?

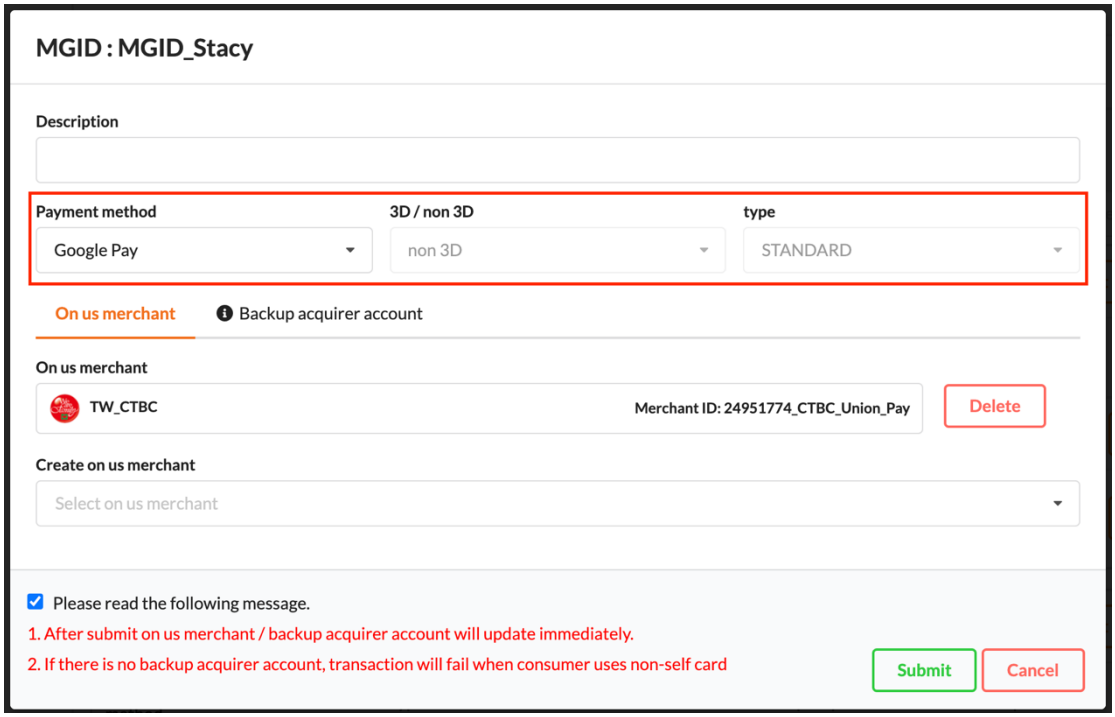
- If you want to create a Google Pay + non-3D + standard with the same on-us merchant/ backup acquirer account as Apple Pay + non-3D + Standard setting record under MGID_Stacy. Click the right-side button [Copy] of the Apple Pay + non-3D + Standard setting record（as shown in the below picture）



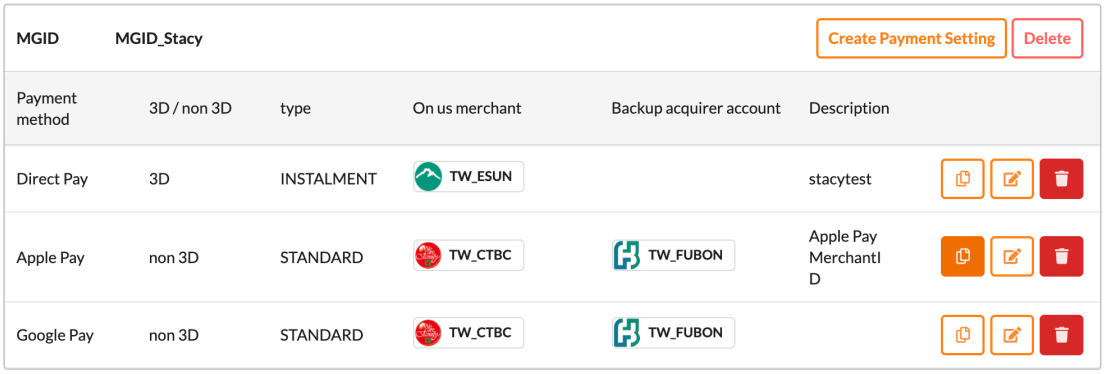
- Viewing the payment setting you just copied, you can see that the on-us merchant and the backup acquirer account are pre-set (same as Apple Pay + non-3D + normal), as shown in the below picture.



- Now you only need to set up the payment method and the type. If you need to change the on-us merchant or the backup acquirer account, you can change it again. After the setting is done, click [Submit].

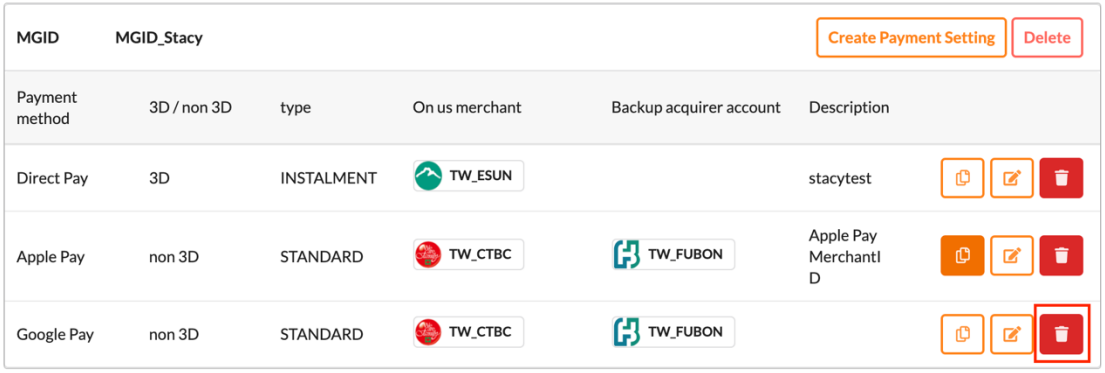


- The setting is updated immediately.



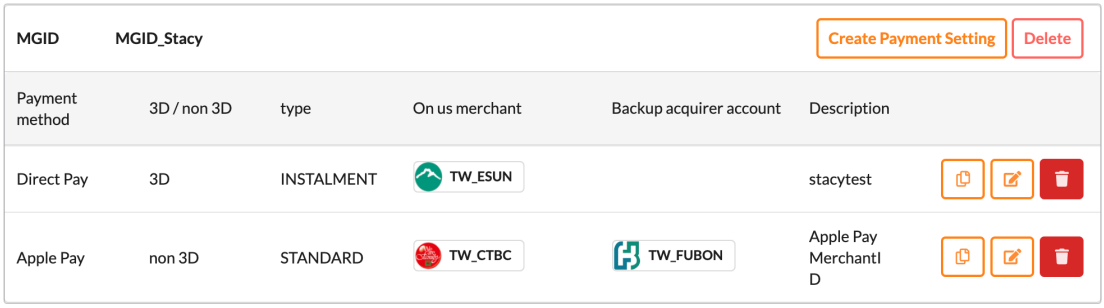
3.14.3.5. How to delete a payment setting?

- If you want to delete a payment setting, click [Delete] on the right side (e.g. Delete MGID_101010 > Google Pay).



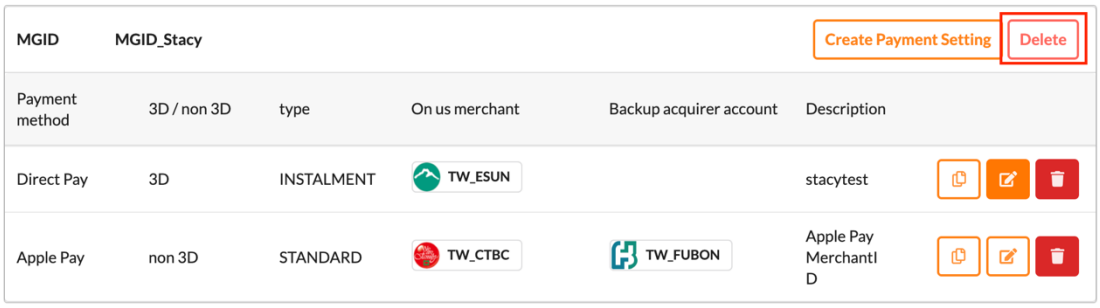
- A confirmation window will pop up to confirm if you want to delete it. Yes: Delete / No: Cancel

- Click [Yes], the setting is deleted immediately.



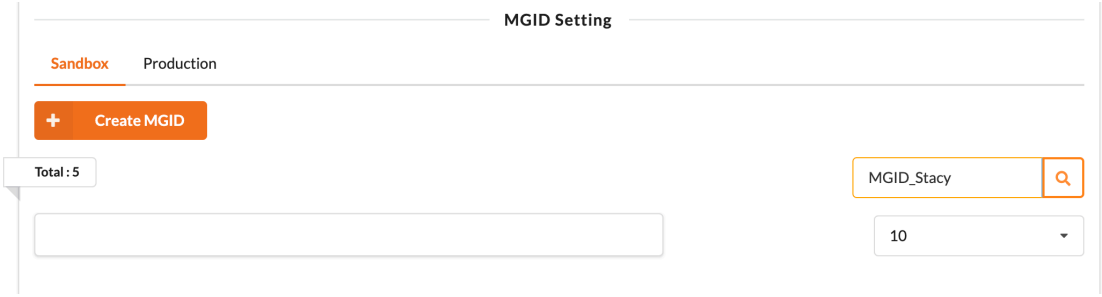
3.14.3.6. How to delete MGID?

- If you want to delete the whole group of the MGID, click [Delete] on the right side (e.g., Delete MGID_101010).



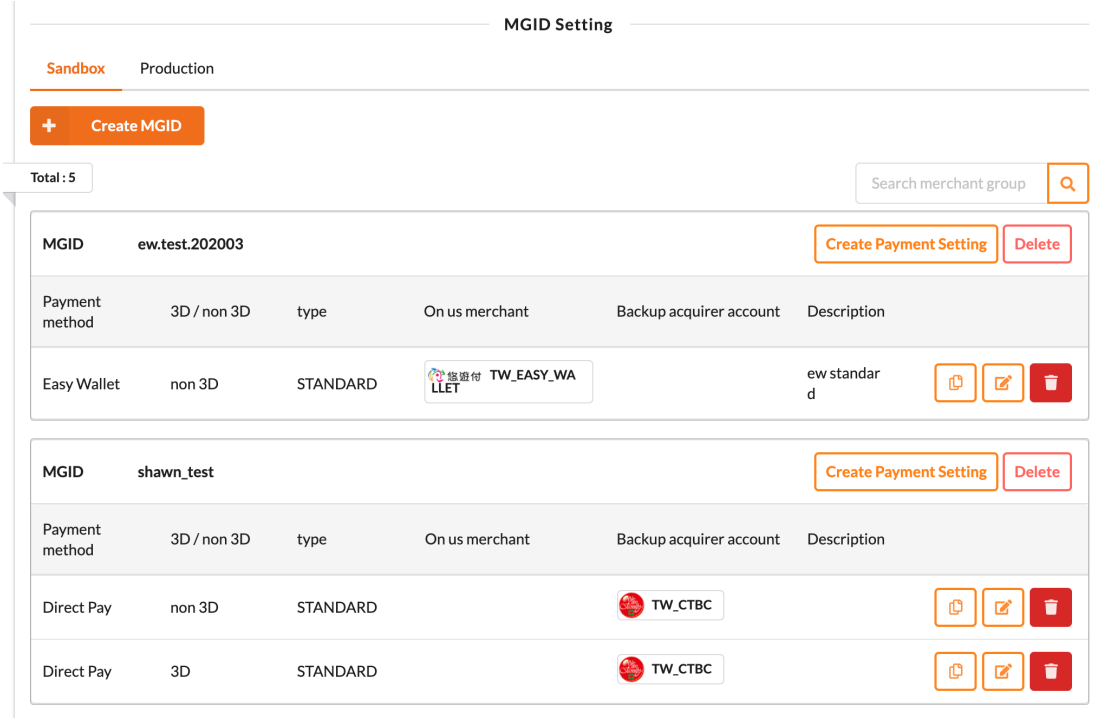
- A window will pop up to confirm if you want to delete it (Confirm to delete: Yes: OK / No: NO). Click [Yes].

- After the MGID is deleted, it cannot be found in the list.

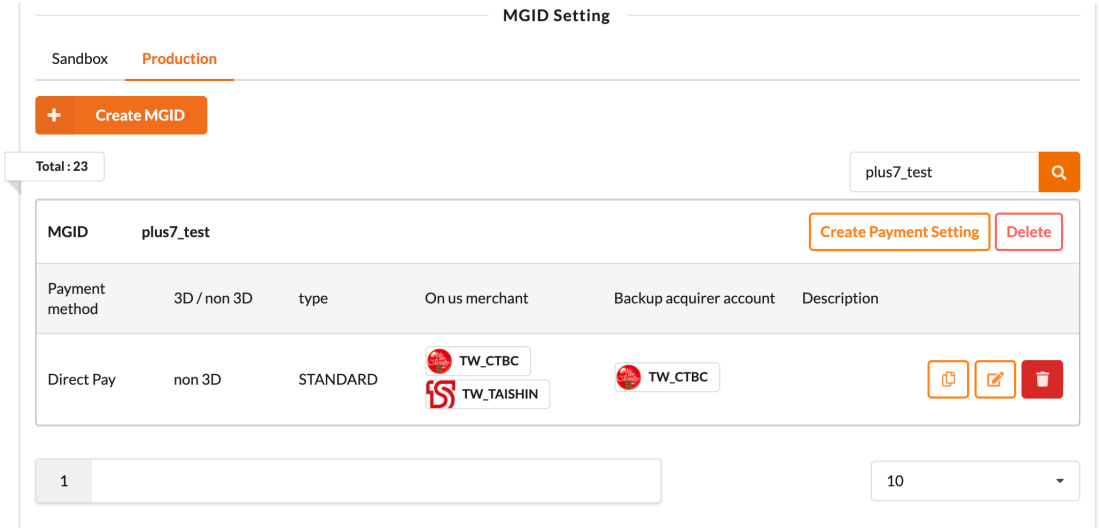


3.14.3.7. How to search for MGID?

- When there are many records and you want to find a specific MGID, just enter the name of the MGID in the search box. For example, I just want to see the setting of MGID:plus7_test



- Enter the name of MGID in the search box and click [Search]. Only the MGID you are looking for will appear on the screen.



3.15. Merchant Management–KYC Verification Merchant Setting

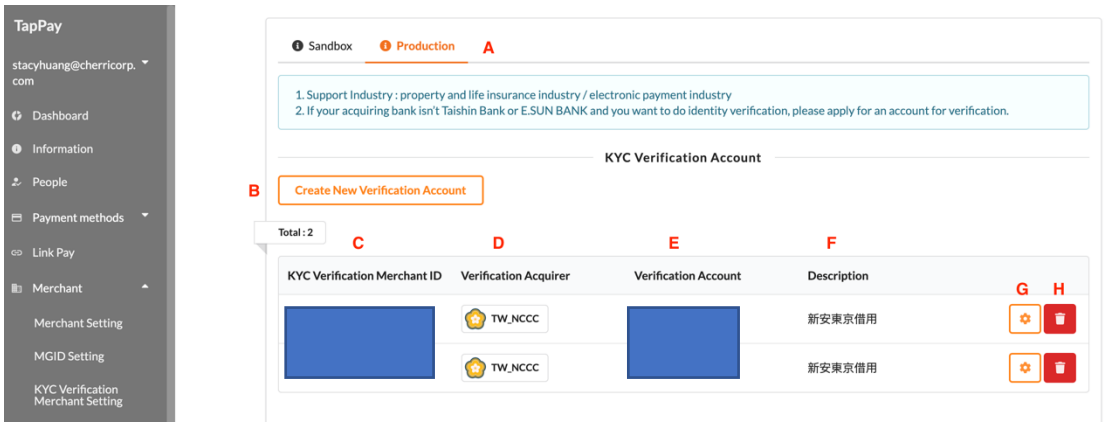
3.15.1. Function Description

If you require KYC verification (authorization not included), you will need set up your KYC verification account here. Currently KYC verification account only supports NCCC verification.

*The settings of sandbox and production environment are basically the same. The only different part is that you can only edit notes and delete KYC verification account in the production environment.

*If you choose Taishin bank and Esun bank to process KYC verification and authorization together, you can create a merchant on [Merchant Setting]. In this case you don't need to create KYC account.

3.15.2. UI Demo—Production Environment



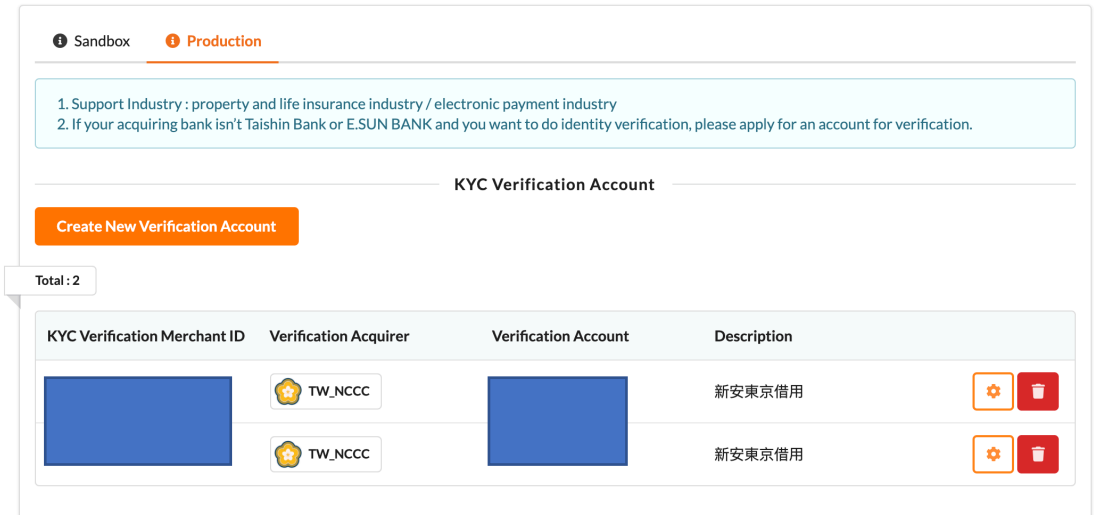
No.	Function	Description
A	Sandbox/production	Switch between sandbox and production
B	Create New Verification Account	Click to create an account
C	KYC Verification Merchant ID	Generated by TapPay
D	Verification Acquirer	Now only NCCC supports KYC verification(separate from authorization)

E	Verification Account	Please apply for NCCC verification account from the bank.
F	Description	User comment. Can be edited.
G	Edit Description	Click to edit description
H	Delete account	Delete the KYC account

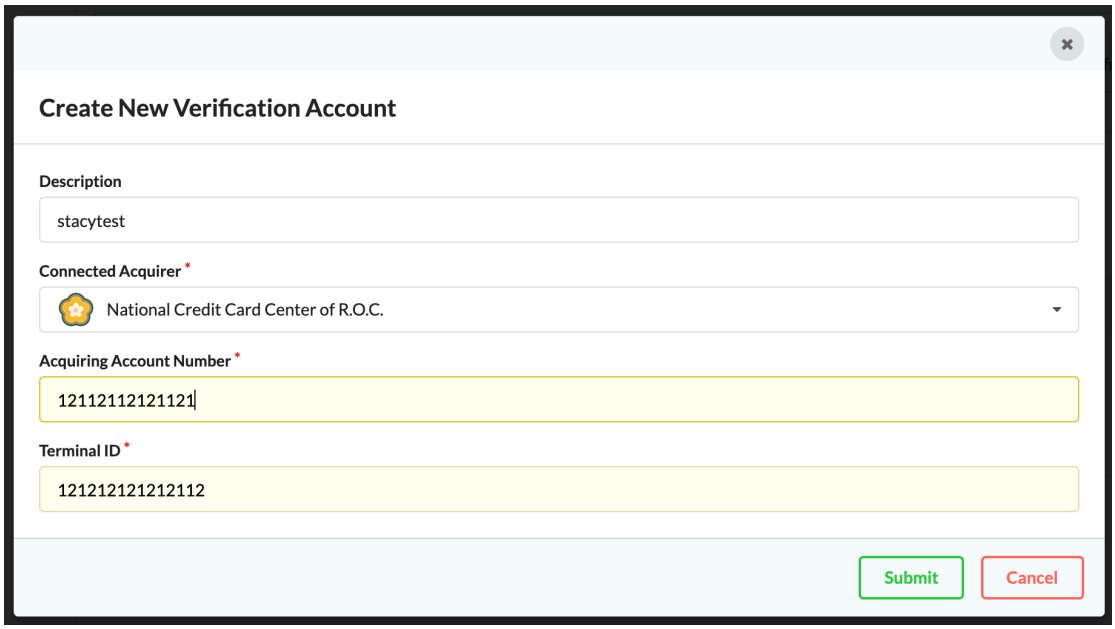
3.15.3. Operating Instruction

3.15.3.1. How to create a KYC verification account?

- Click [Create KYC Account]

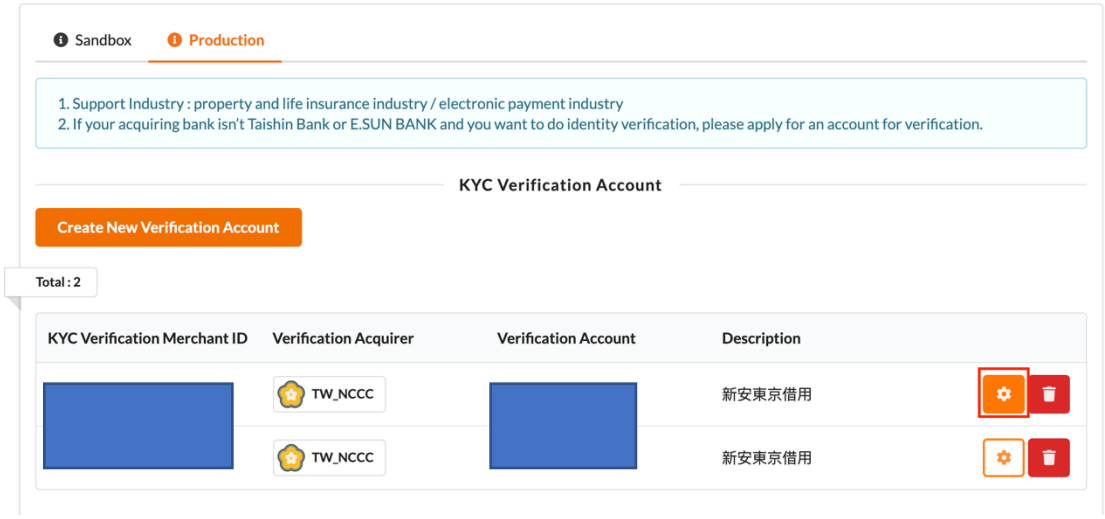


- Fill in the note. The only bank option provided here is NCCC. You can apply for Account ID and Terminal ID from NCCC. Click [submit] when it is done.



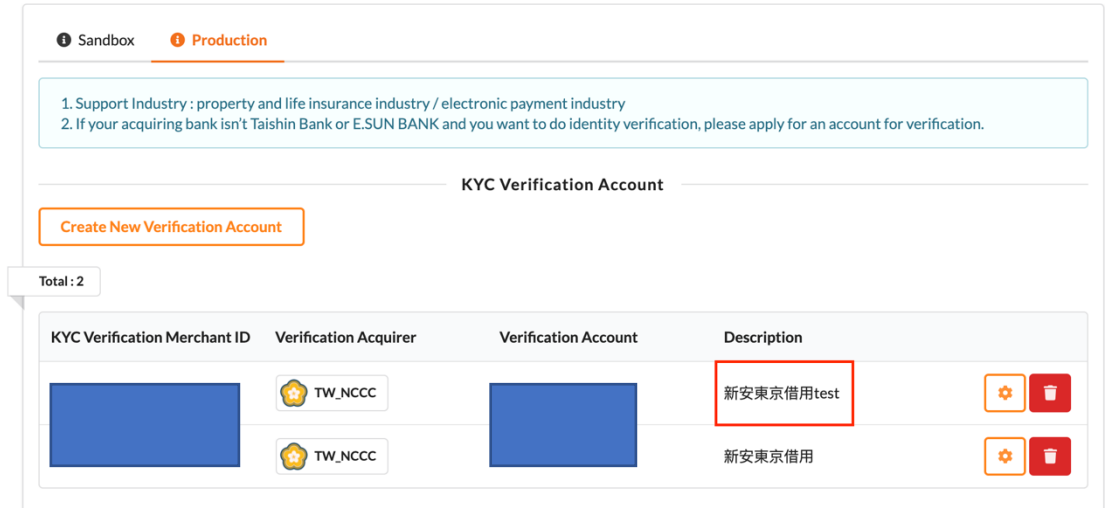
3.15.3.2. How to edit the note?

- Please select [edit note] for the KYC account.



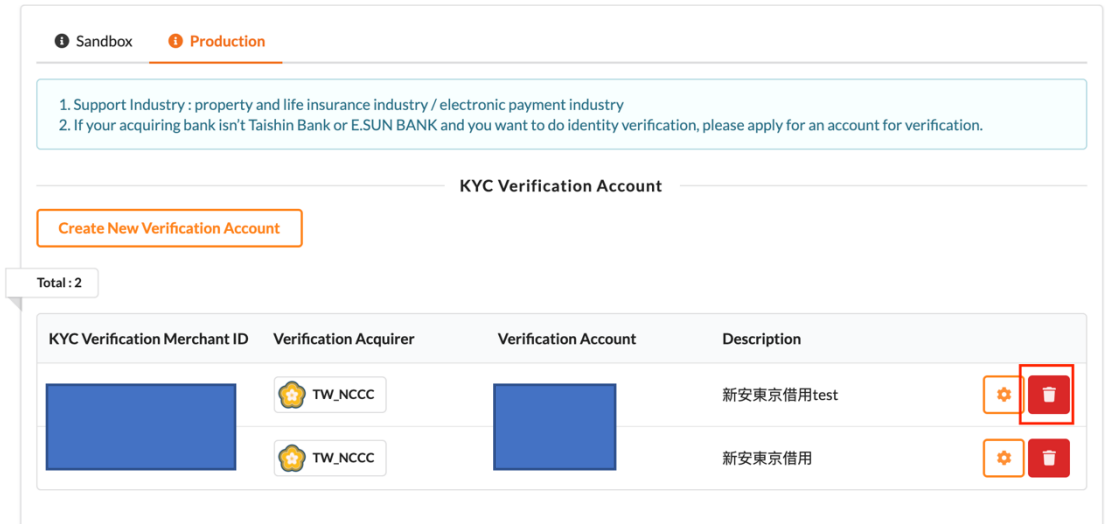
- Update the content of the note.

- You can see the note is updated successfully as below.

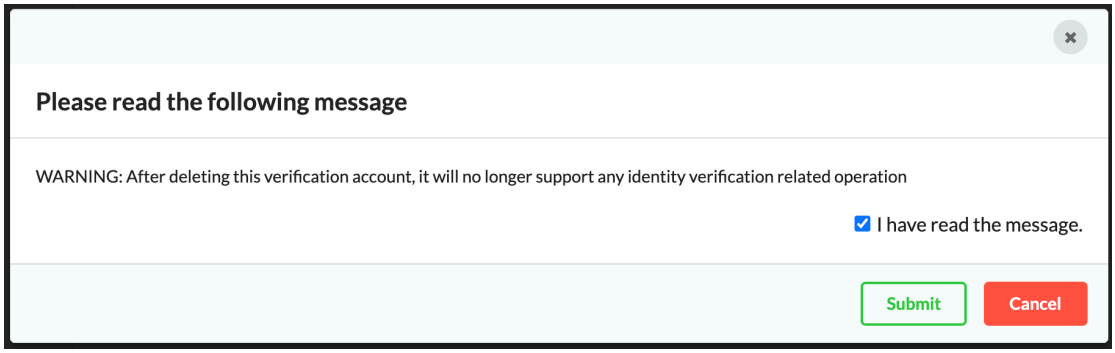


3.15.3.3. How to delete a KYC account?

- Click [delete] button below.



- A confirmation window pops up. Please check [I have read it] and [submit]. The KYC Account will be deleted immediately.

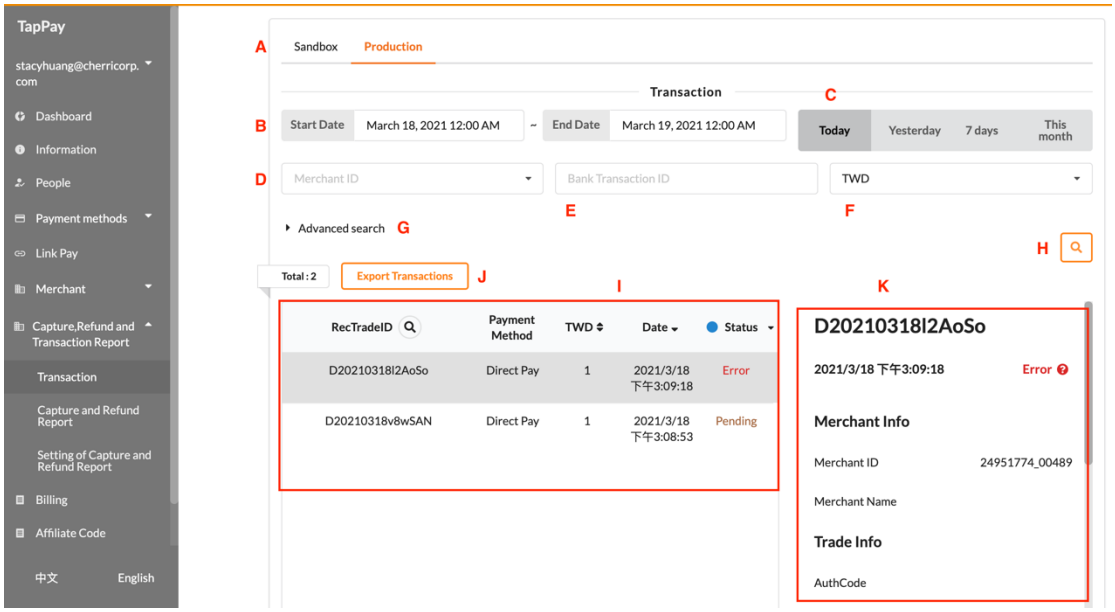


3.16. Capture, Refund and Transaction Report–Transaction

3.16.1. Function Description

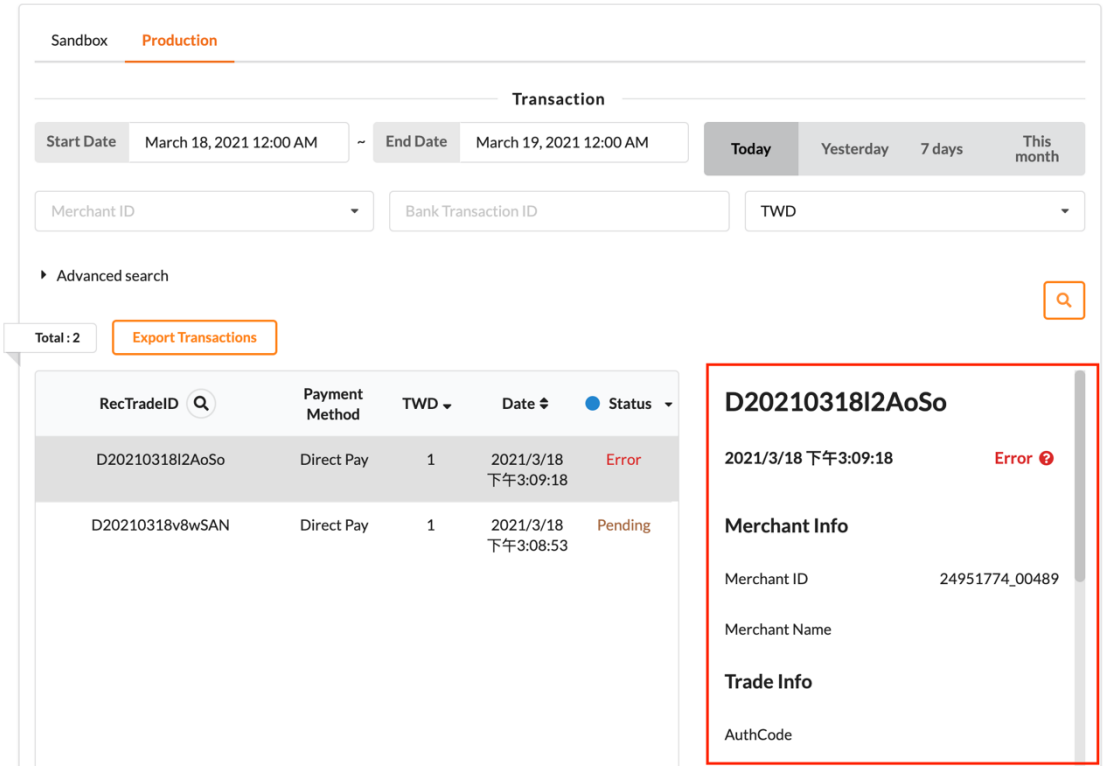
It has a testing environment and a production environment. Here you can see the transaction history. It allows you to view the details of a single transaction, search for a specific transaction, and export the transactions for reconciliation purposes.

3.16.2. UI Demo—Transaction



No.	Function	功能說明
A	Sandbox/production	Switch between sandbox and production. Fields are identical.
B	Start date~End date	Set a period of time
C	Quick search	Today/yesterday/7 days/this month
D	Merchant ID	Search for Merchant ID
E	Bank transaction ID	Provided by banks
F	Currency	TWD/HKD/MYR/USD
G	Advanced search	Capture date/transaction type/transaction information/cardholder
H	Search button	Search transaction records
I	Transactions	Show transaction information
J	Export transactions	Export csv files
K	Transaction details	Click the transaction to view details and trade history

3.16.3. UI Demo—Details of the transaction

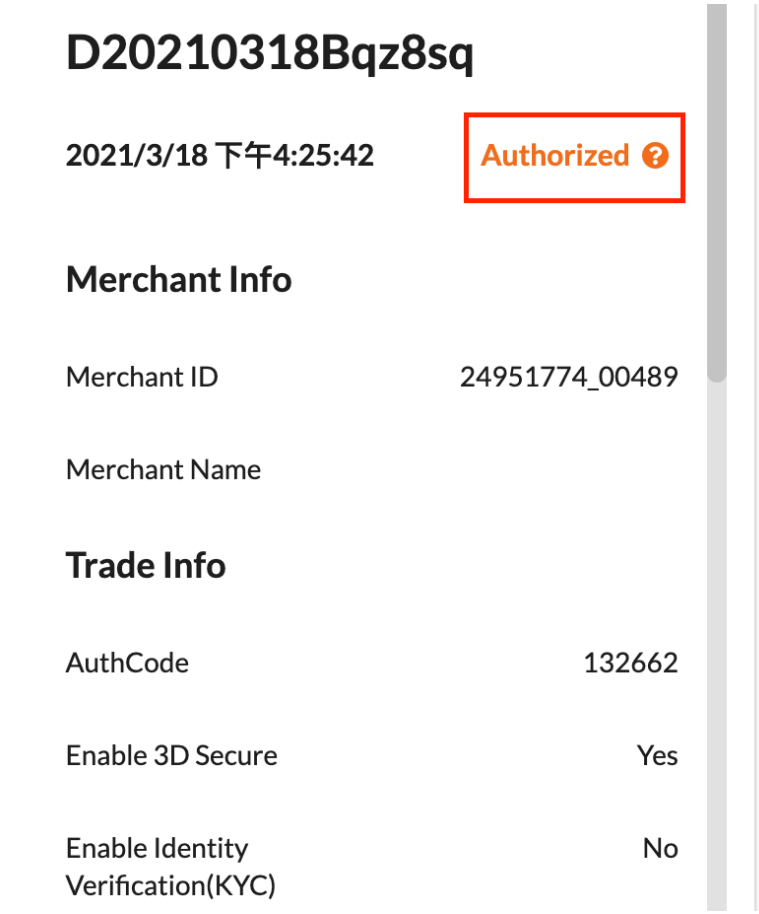


No.	Function	Description
-	Bank Transaction ID	Generated by banks
-	order_number	Created by Merchants
-	recTradeId	Generated by TapPay
-	Payment method	e.g., TSP transaction, Apple Pay, Direct Pay…
-	Currency	Transaction currency
-	Authorization time	The time when the transaction is authorized
-	Status	Current status of the transaction
-	Merchant Info	Merchant ID, Merchant Name
-	Trade Info	e.g., AuthCode, Enable 3D Secure, Card Type…
-	Trade History	Records of every status and the results of actions.
-	User Information	e.g., Partial Card number, Card identifier, Cardholder name…

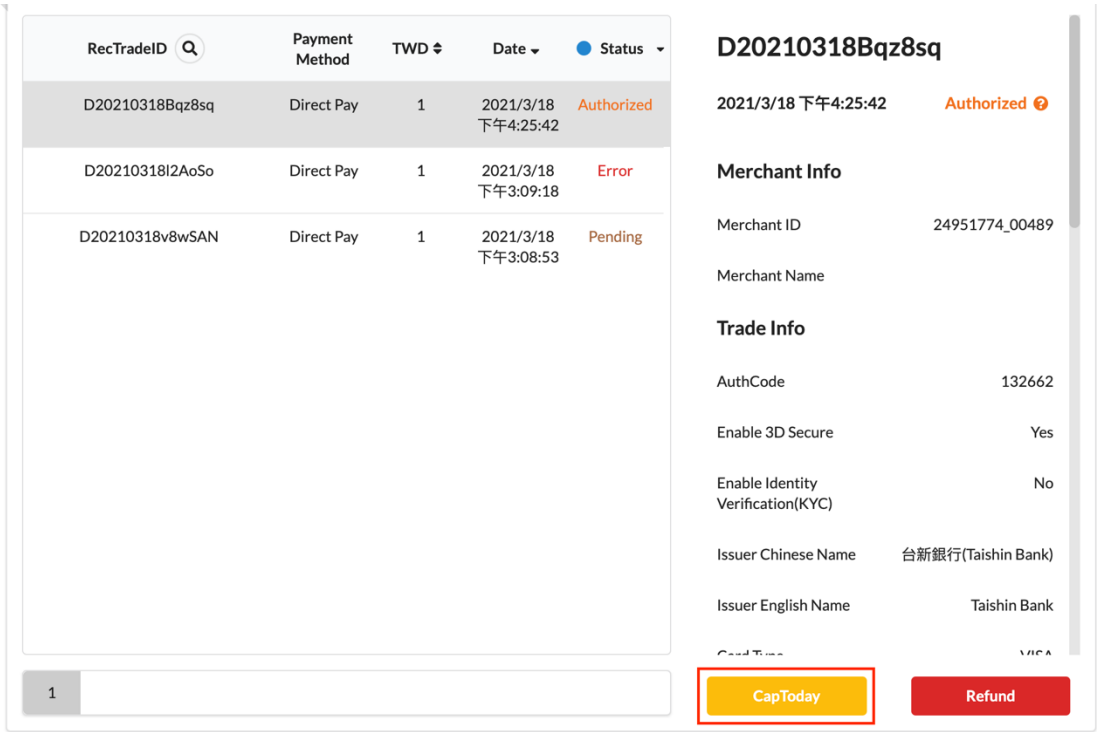
3.16.4. Operating Instruction

3.16.4.1. How to capture a payment manually?

- If you disabled auto capture, you need to capture the payment manually. You can see as below after a payment is authorized.

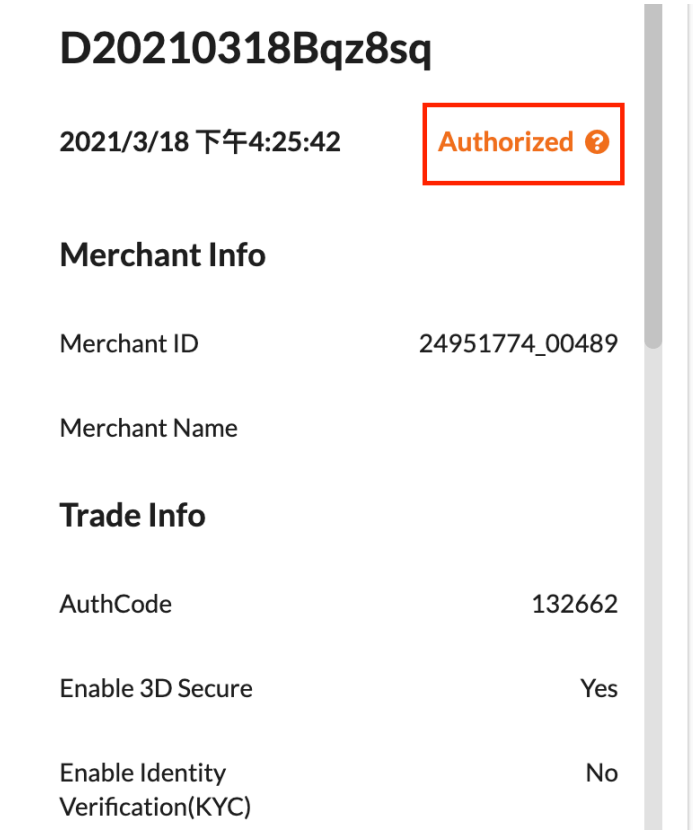


- Click [CapToday] to capture the payment at the day you click it.

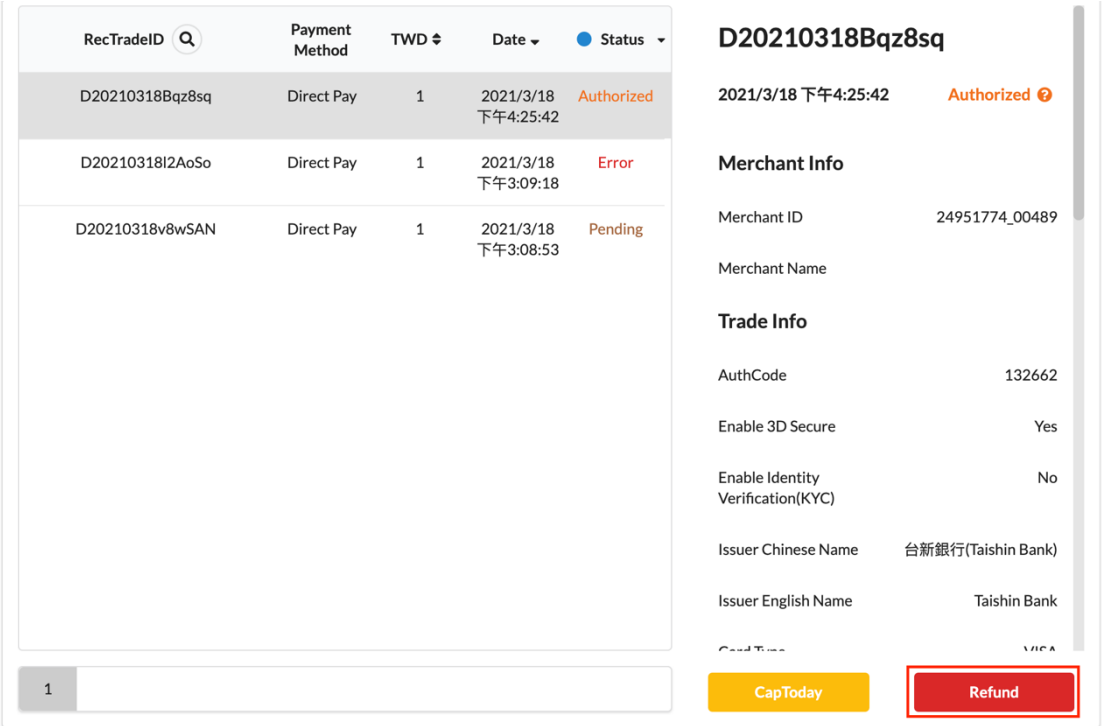


3.16.4.2. How to cancel authorization of a payment?

- Go to [Capture, Refund and Transaction Report > Transaction] to see the status is [authorized].

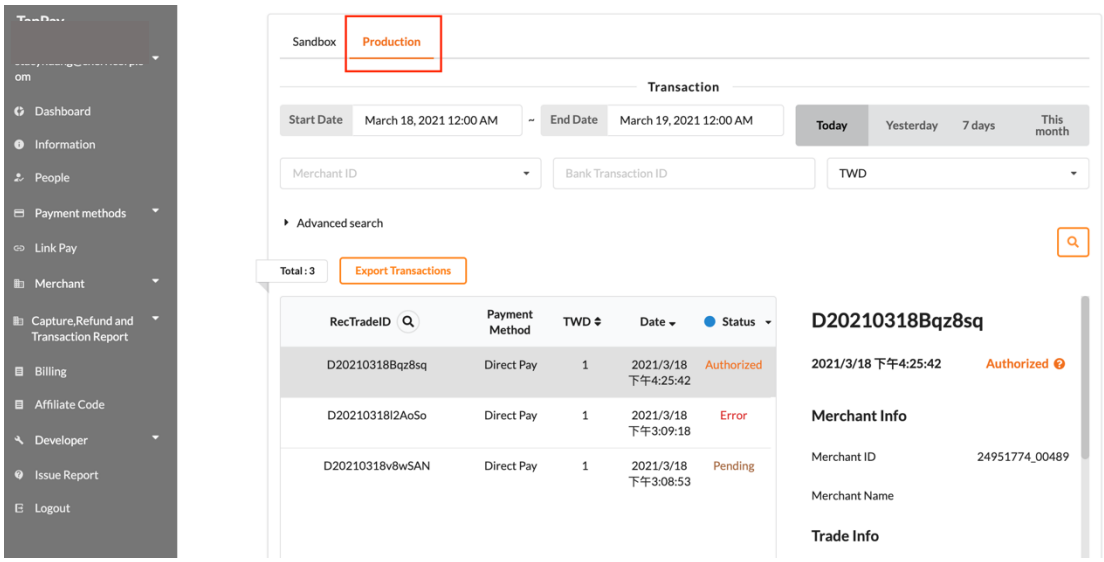


- Click [Refund] to cancel authorization.

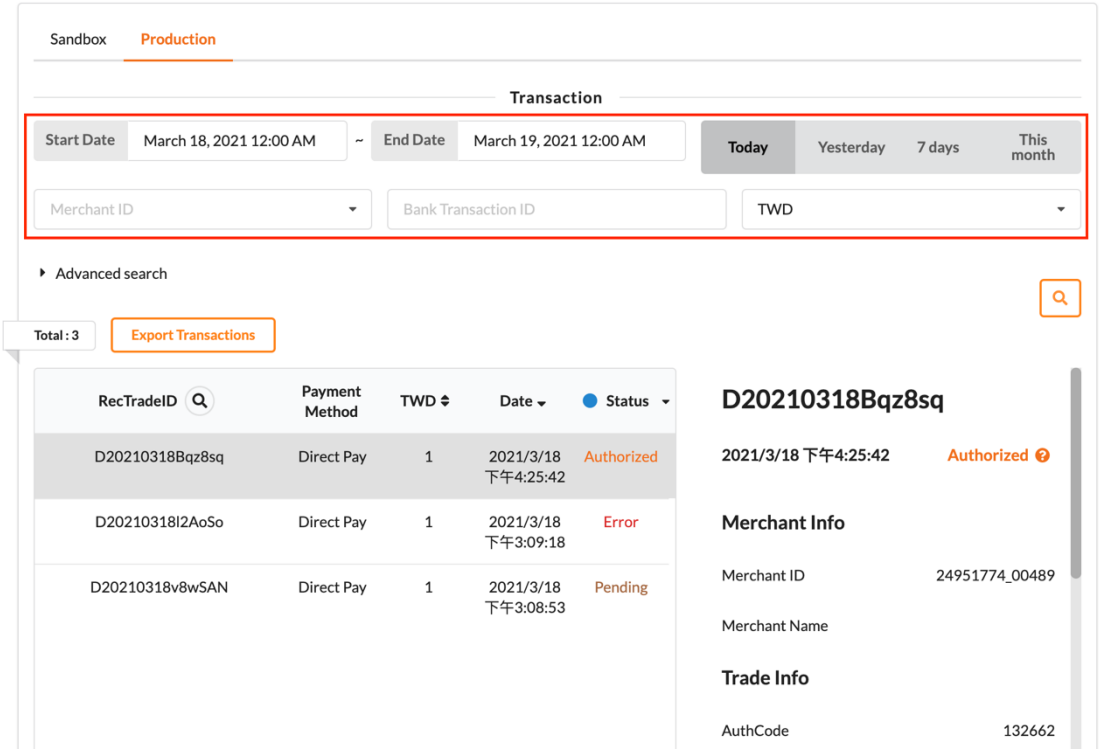


3.16.4.3. How to search for a specific transaction?

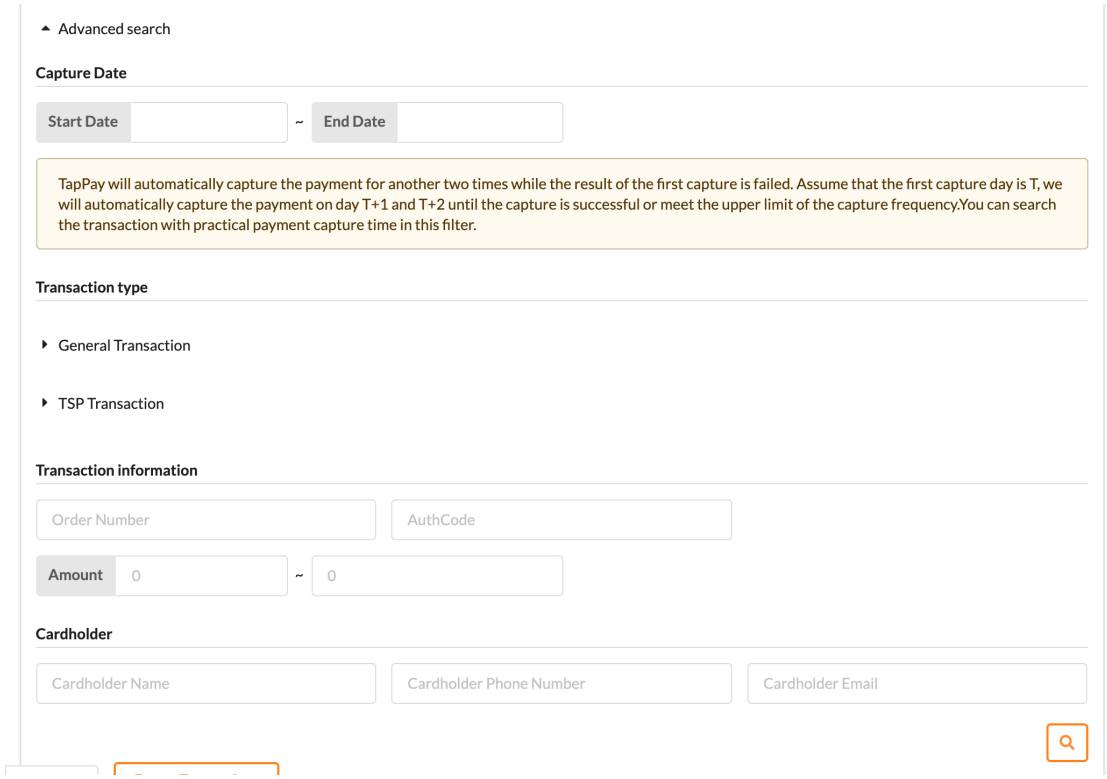
- Select the production environment



- Set up the searching criteria.

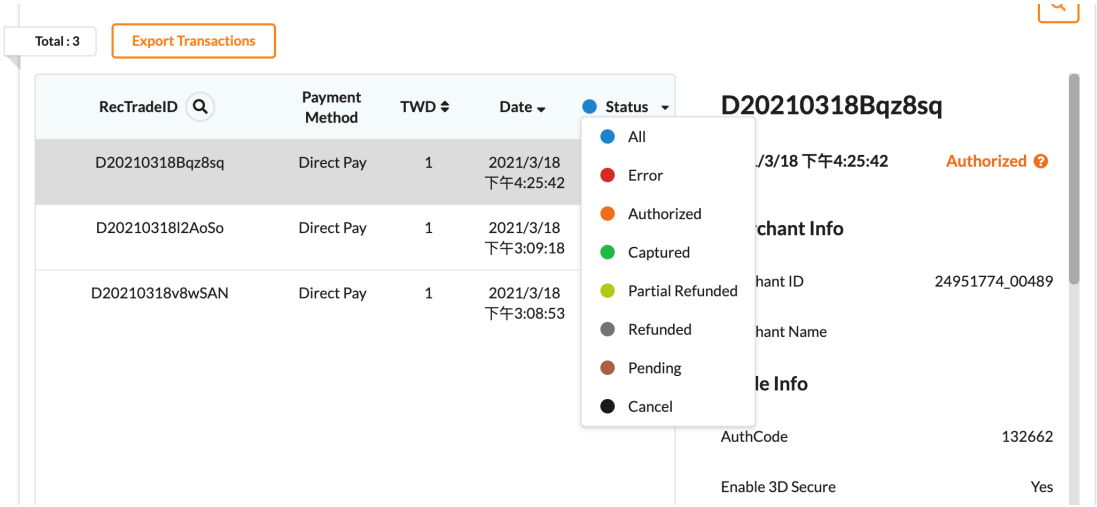


- Click [Advanced Search] shows more searching criteria. Click [search] when everything is set up.

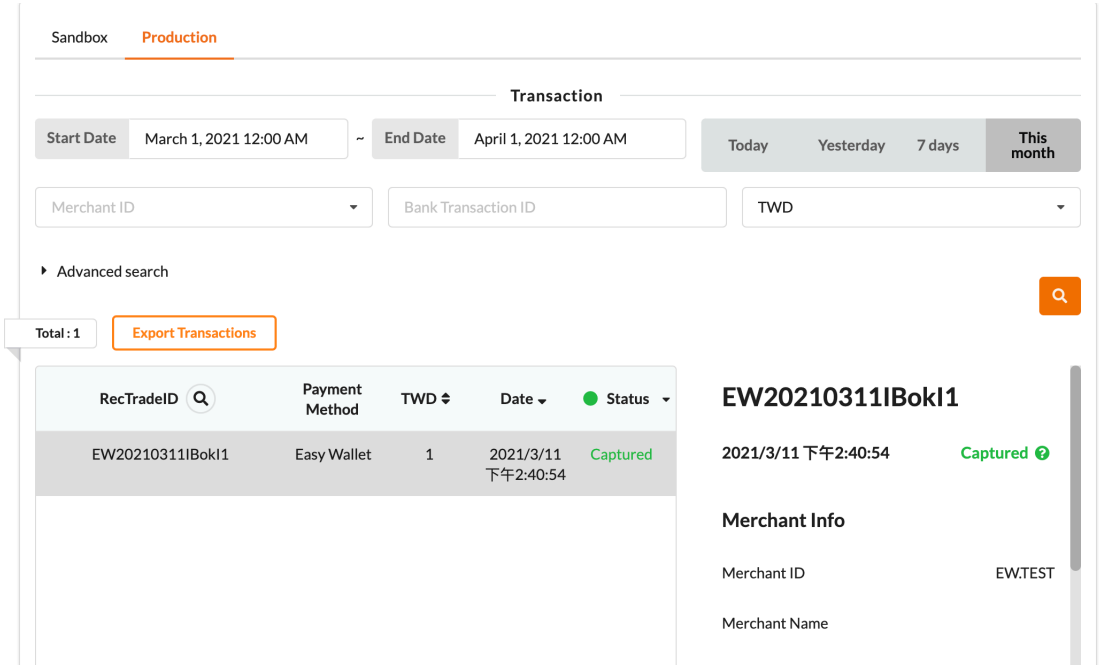


3.16.4.4. How to filter the transaction status?

- Click [Status] to select a certain status you would like to view.

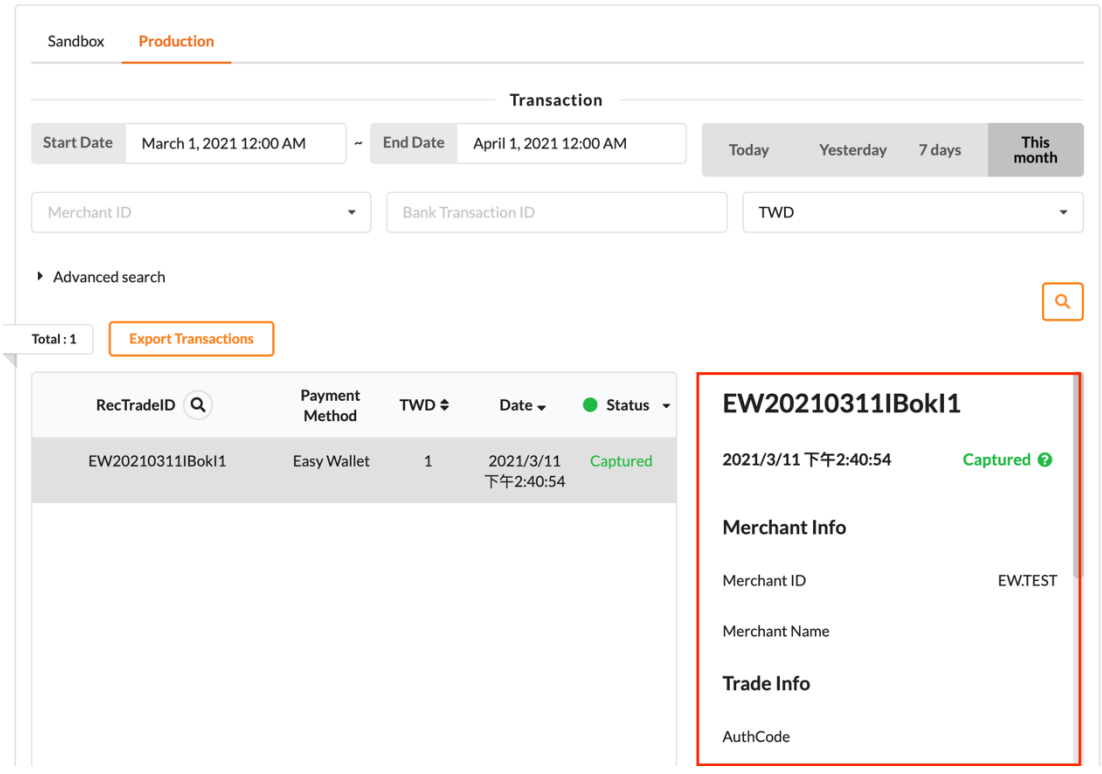


- Click [Captured], it will show all the transaction whose payment is captured in the chosen period.



3.16.4.5. How to view the details of a certain transaction?

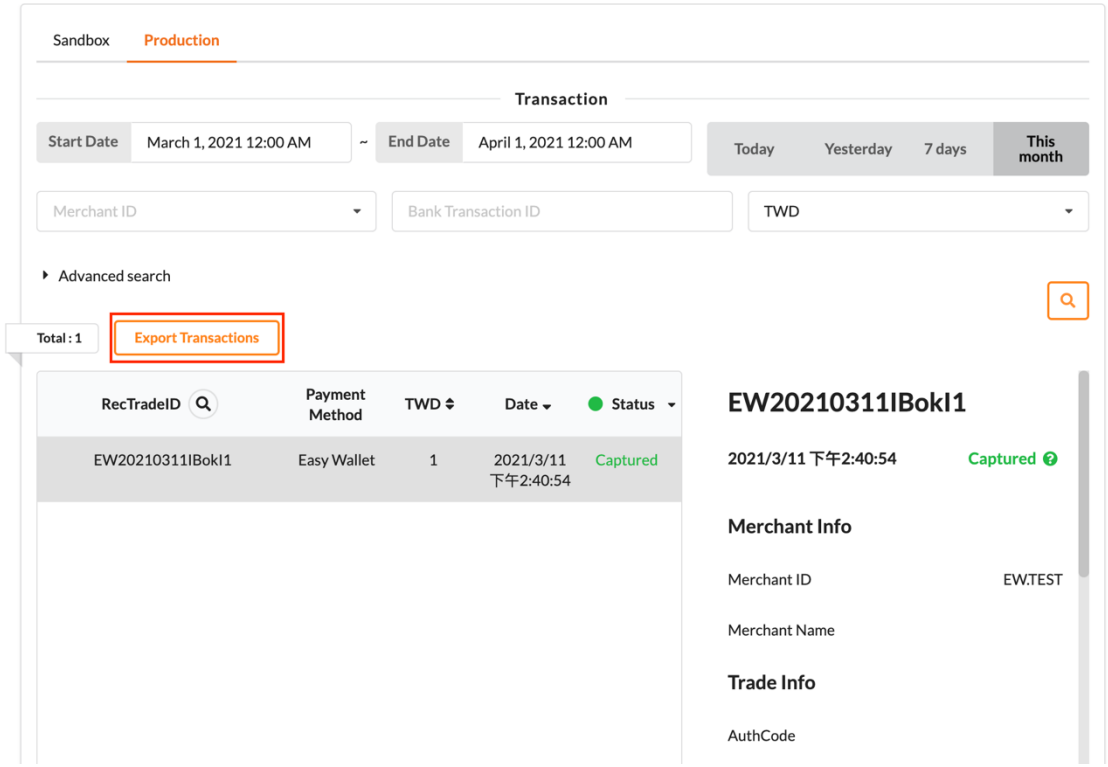
- Select the transaction, the details will appear on its right side.



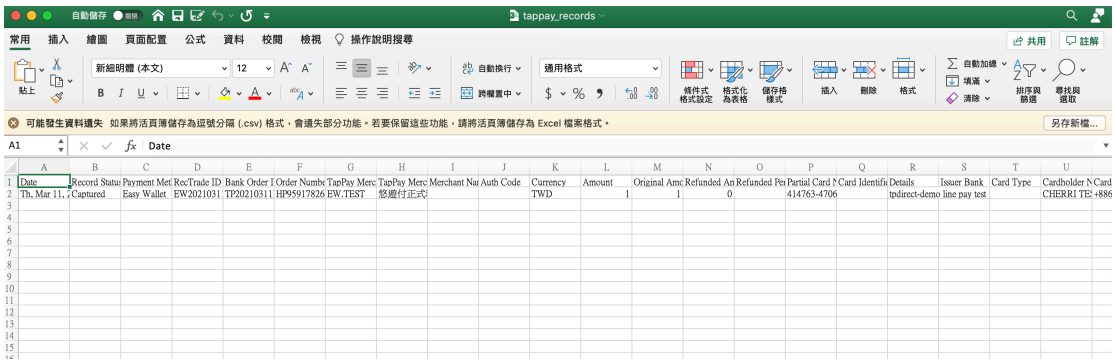
3.16.4.6. How to export transaction data?

- Click "Export Transactions" to export the transactions to Excel for the selected dates.

If it is not downloaded, please click "Click this button to download the transaction records within X seconds" again.



- The exported transaction records are as below

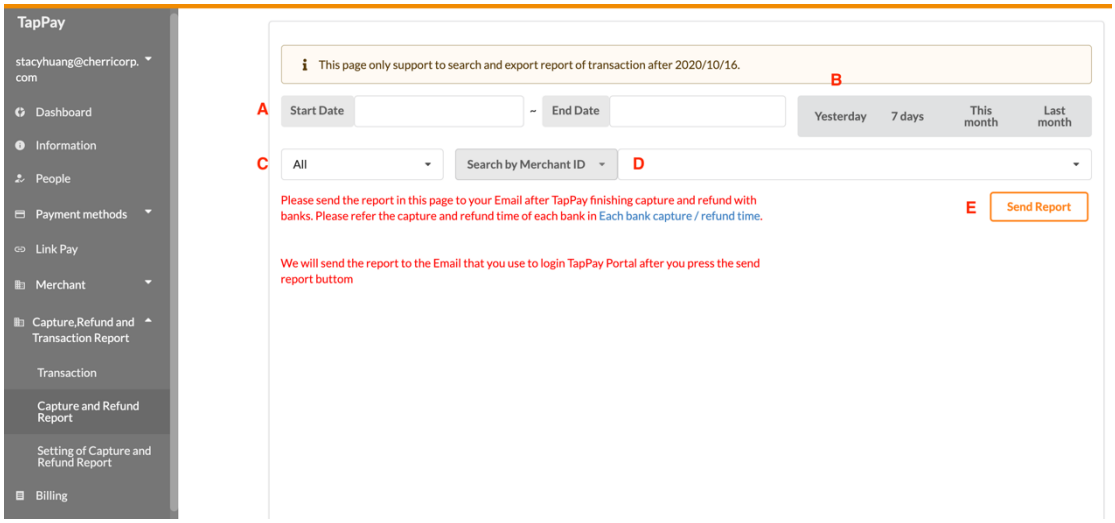


3.17. Capture, Refund and Transaction Report–Capture and Refund Report

3.17.1. Function Description

You can search for Refund and Transaction records in a certain period and export it as a report to be sent to the assigned email addresses. The report is mainly used by the accountant for reconciliation purpose.

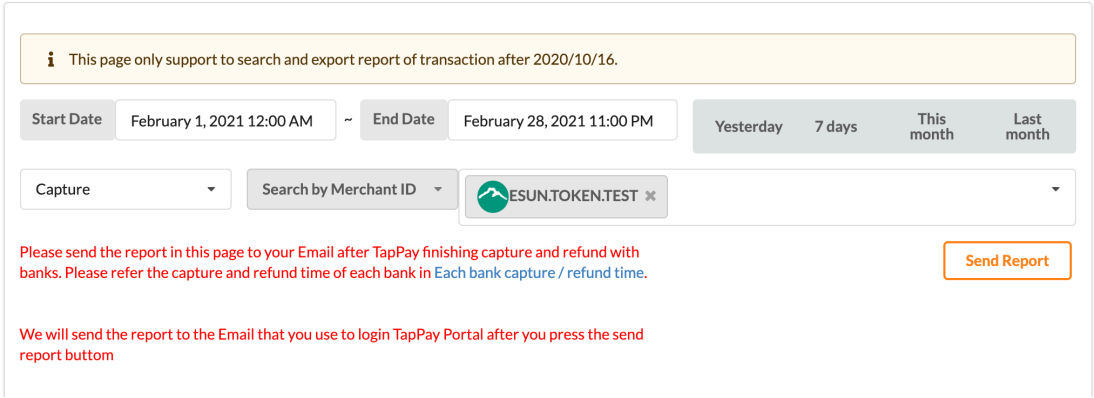
3.17.2. UI Demo



No.	Function	Description
A	Start Date ~ End Date	Search by a period of time
B	Quick search	Yesterday, 7 days, this month, last month
C	Types	All/capture/refund
D	Merchant ID	Search by Merchant ID
E	Send report	Send report/edit default emails

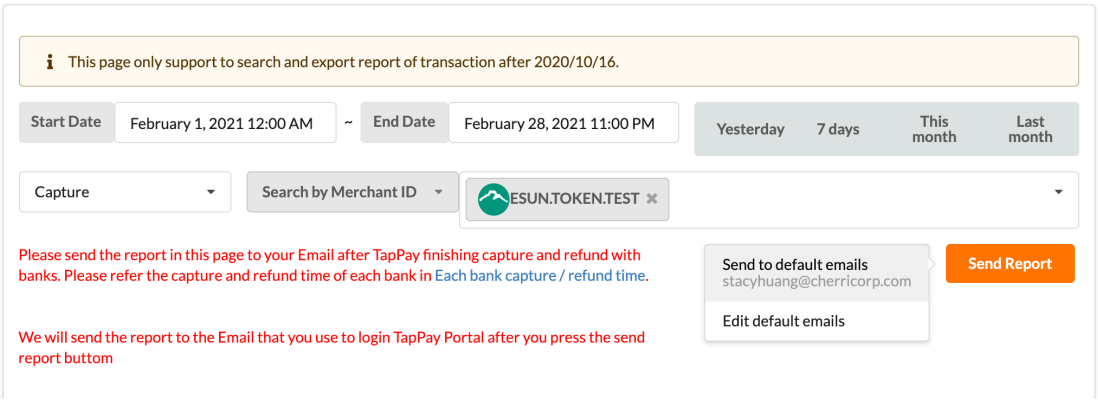
3.17.3. Operating Instruction

- Set the searching criteria.



- Edit default Emails. You can configure up to 5 emails.

- Send the report to the default emails and check.

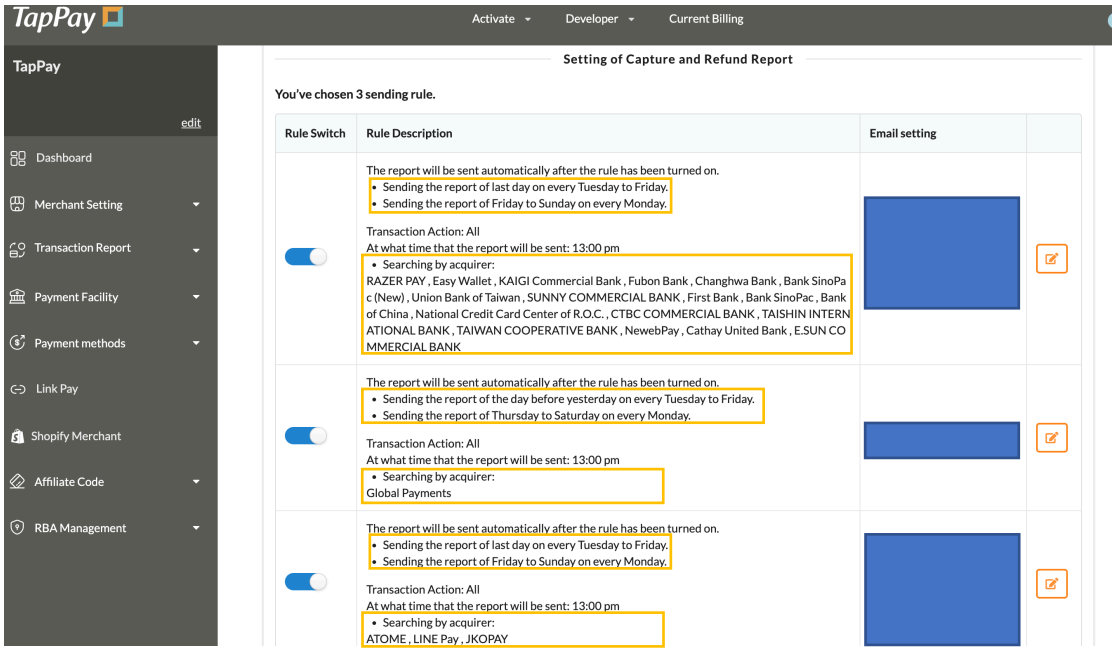


3.18. Capture, Refund and Transaction Report–Setting of Capture and Refund Report

3.18.1. Function Description

To automatically receive the report after banks have processed captures and refunds, you can turn on the settings here. We have 2 different settings according to banks rules. After you have turned on the settings, the report will be automatically delivered to your default emails at the time stated.

3.18.2. UI Demo

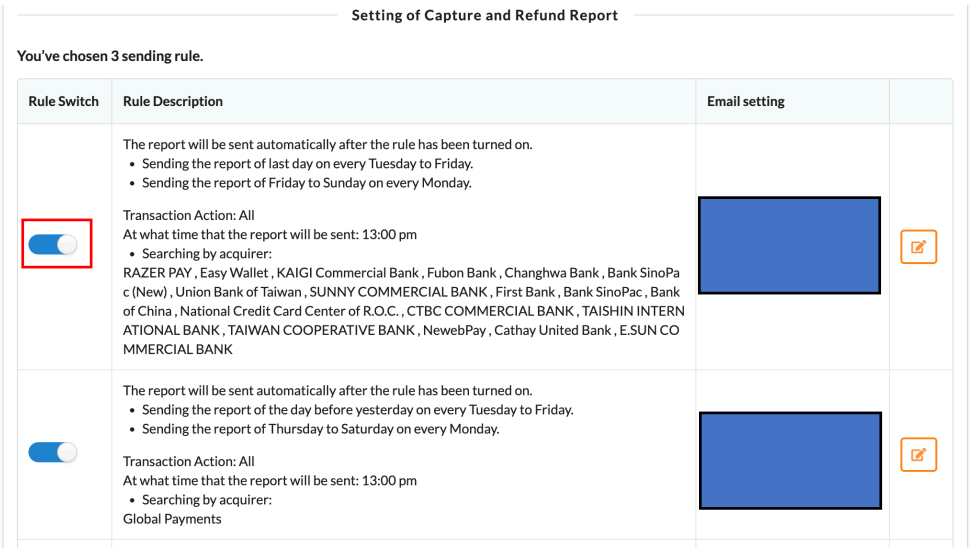


- There are different rules, according to the banks and capture, refund rules.

3.18.3. Operating Instruction

3.18.3.1. For example：turn on [Rule 1]

- Please click the button below to turn on the setting



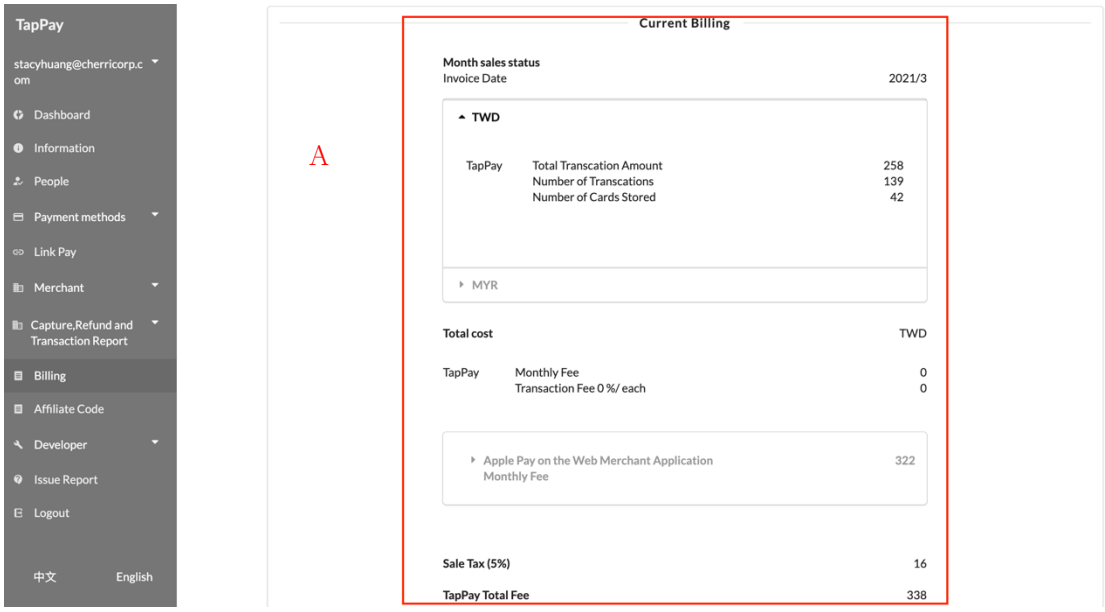
- Click the [edit] button on the right side to edit emails. After it is saved, the reports will be sent according to the rule.

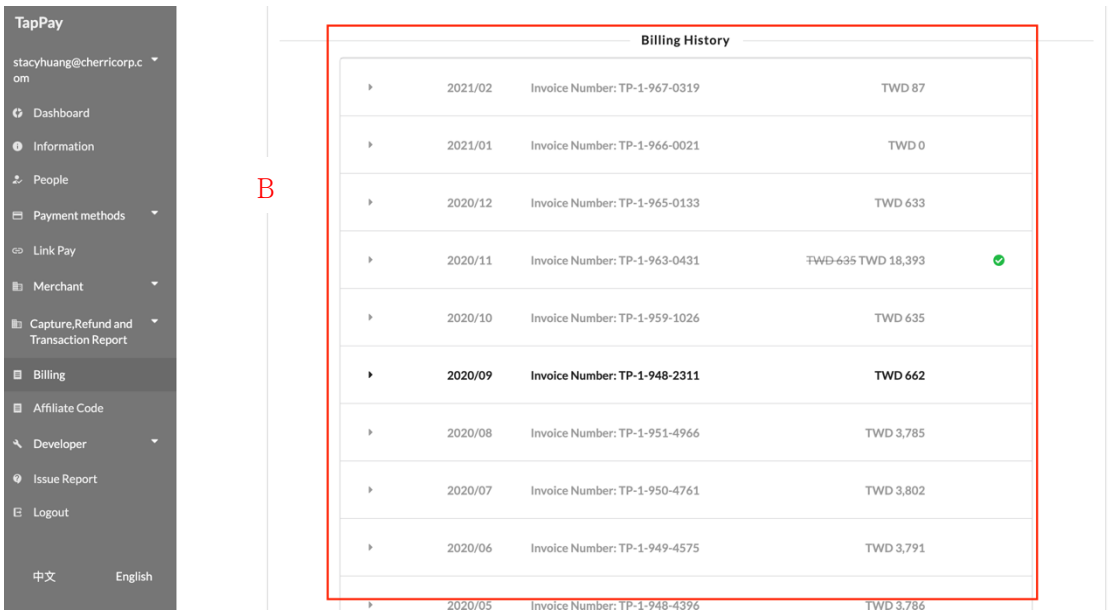
3.19. Billing

3.19.1. Function Description

You can check the current month's sales status and the TapPay system service fee for that month here. You can see the records of the past months in the below billing history

3.19.2. UI Demo





No.	Function	Description
A	Current Billing	Show billing of this month
B	Billing History	Show all history of billing

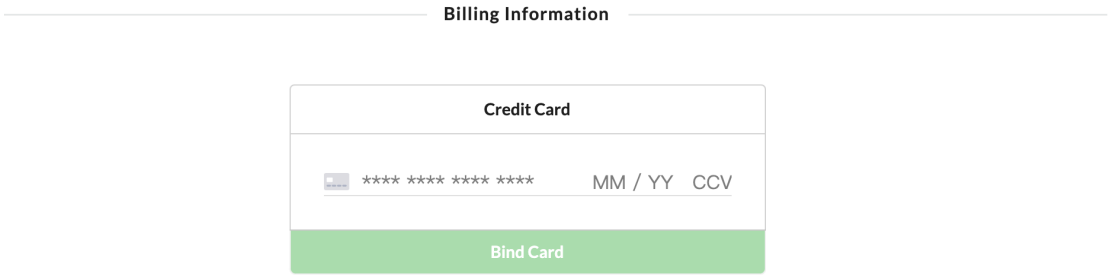
3.19.3. Operating Instruction

3.19.3.1. How to link a credit card and pay automatically?

*You can link a credit card at the bottom of the page and set to pay automatically with a 5% discount on the monthly fee (depending on if your company decides to pay by a credit card)

*Only the merchants that have gone online can use the “Link Credit Card to Pay Monthly Fee" function.

- Select "Billing" and go to "Payment Information" at the bottom of the page.
- Enter the credit card number and click [Link Credit Card] to complete the process.



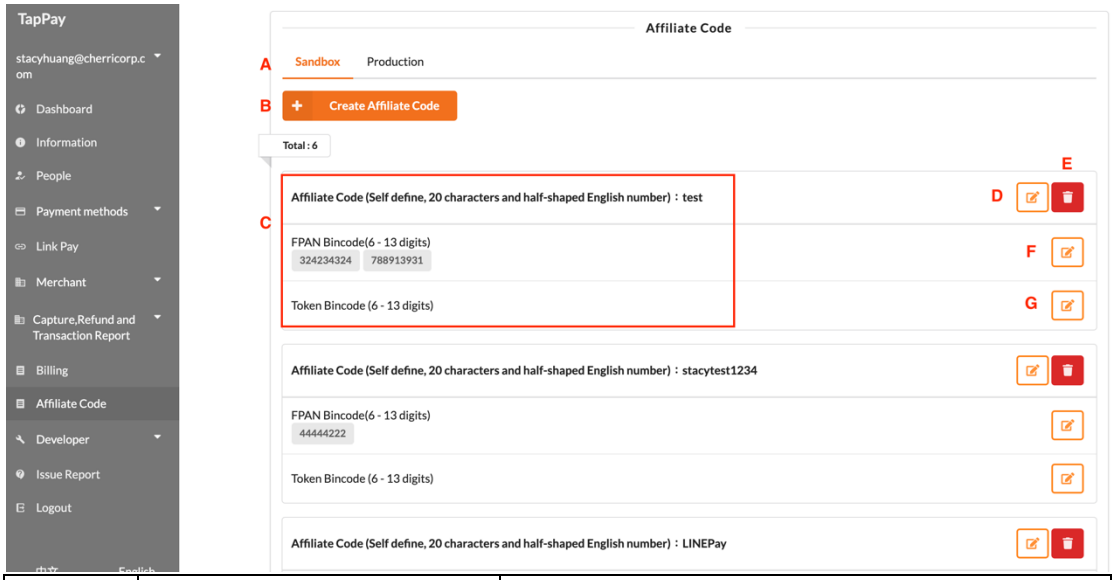
3.20. Affiliate Code

3.20.1. Function Description

When a bank and a merchant are promoting a co-branded credit card, you can create an Affiliate Code and set up a matching card number.

For example, a merchant and Taishin GOGO Card are going to have a limited-time promotion, consumers will be rewarded for spending on a certain platform (e.g. 1%). If they use their Taishin GOGO Card, they will be rewarded 2% more. Then, the merchant can set an Affiliate Code and a matching card number to use this function.

3.20.2. UI Demo

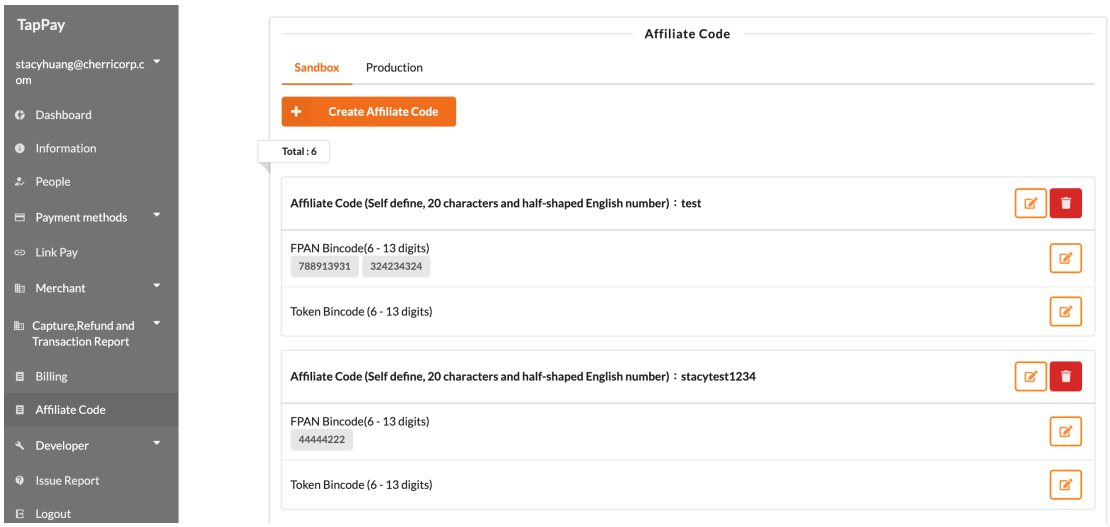


No.	Function	Description
A	Sandbox/production	Switch between sandbox and production
B	Create Affiliate Code	Click to create Affiliate Code
C	Affiliate Code information	Show Affiliate Code information
D	Edit Affiliate Code	Edit Affiliate Code name
E	Delete Affiliate Code	Delete Affiliate Code
F	Edit FRAN Bincode	Click to edit FRAN Bincode
G	Token Bincode	Click to edit Token Bincode

3.20.3. Operating Instruction

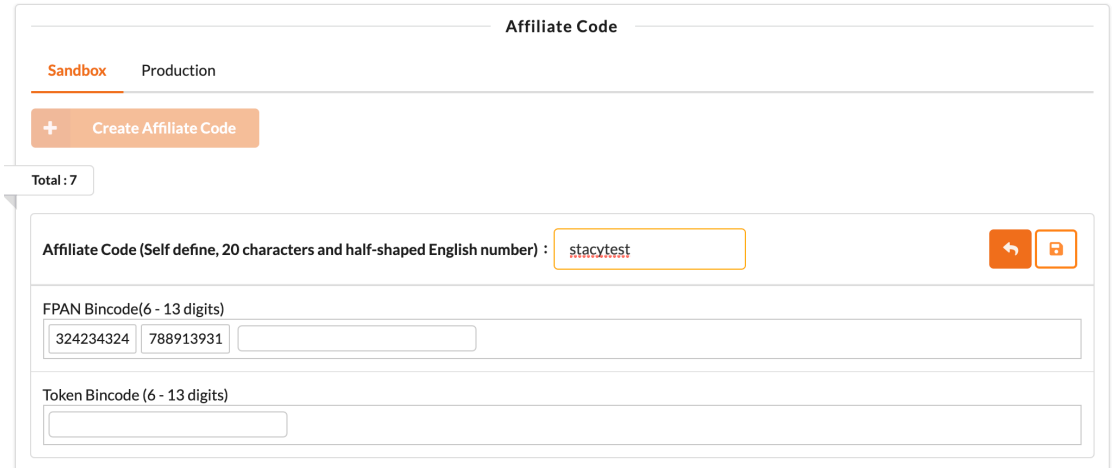
3.20.3.1. How to create an Affiliate Code?

- Click [Create Affiliate Code].



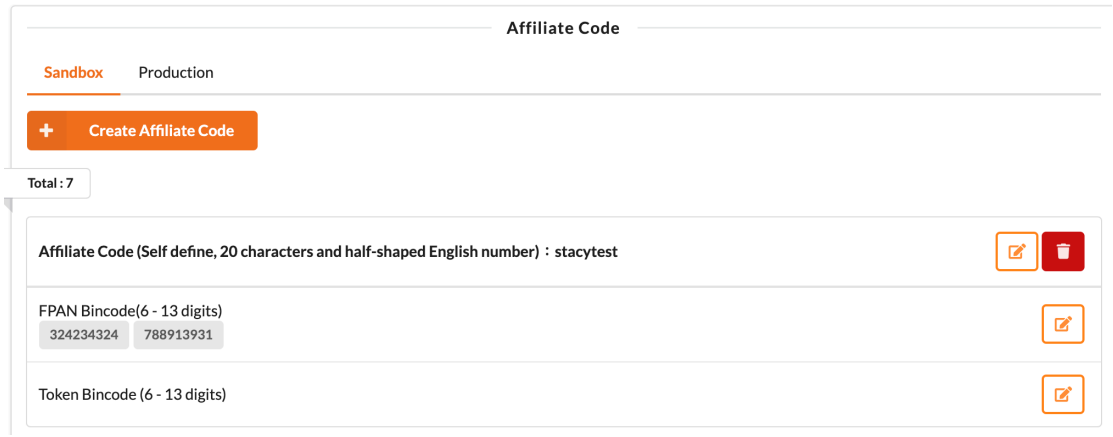
- It shows a blank Affiliate Code for you to set up the information (Affiliate Code name and card number). Click [Save] when you are done, otherwise, click [Back] to cancel the action.

*After you enter a card number and want to add another one, just click [Enter] and it will show a new card number field for you to input.



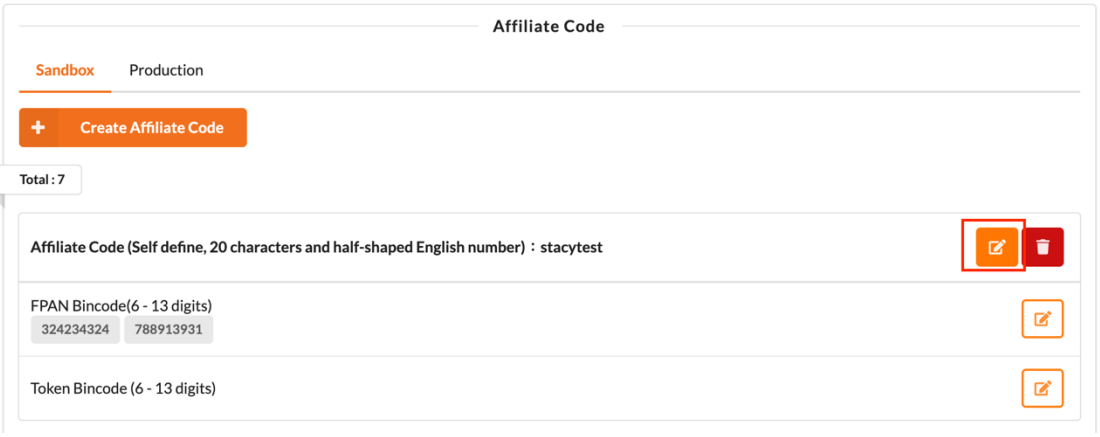
- A confirmation window pops up: Are you sure to create the Affiliate Code? Confirm to create: Yes: OK, No: NO

- Once created successfully, the newly added Affiliate Code will immediately appear on the top.

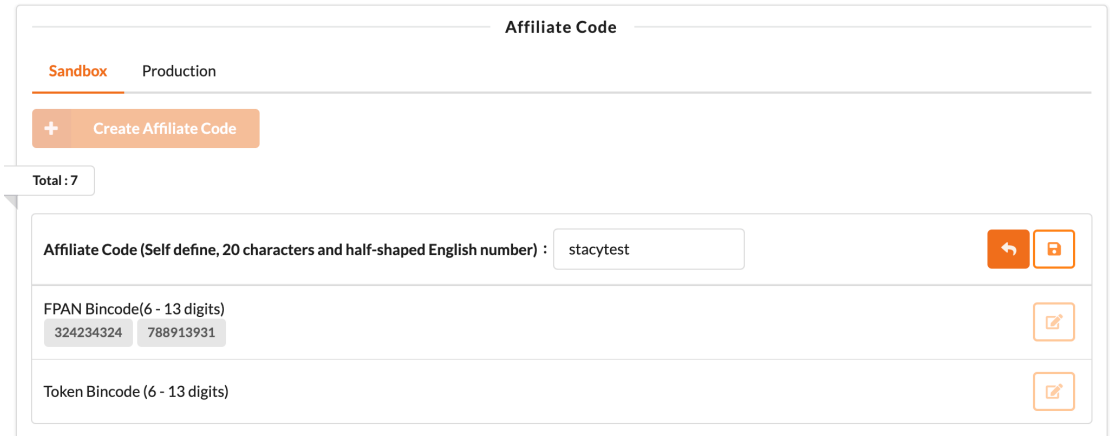


3.20.3.2. How to edit the name of Affiliate Code?

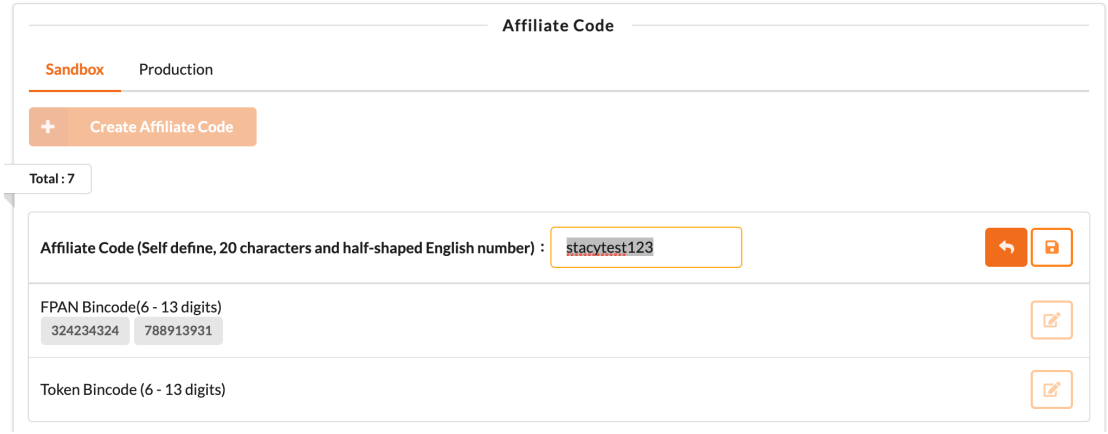
- When you want to change the name of an existing Affiliate Code, click [Edit] (e.g. change Affiliate Code: test123456 to test).



- Affiliate Code name becomes editable as below.

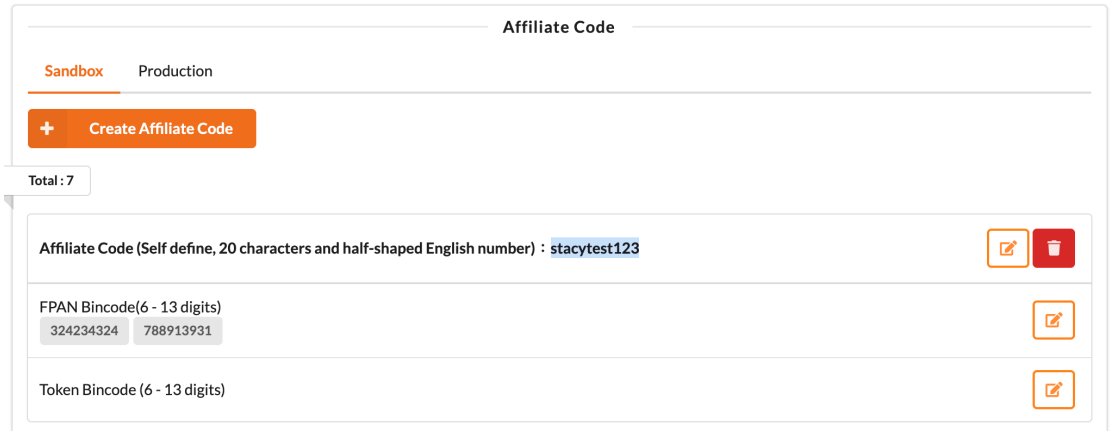


- After editing, click [Save].



- A confirmation window pops up. Click [OK] to confirm the change.

- The change is updated immediately.



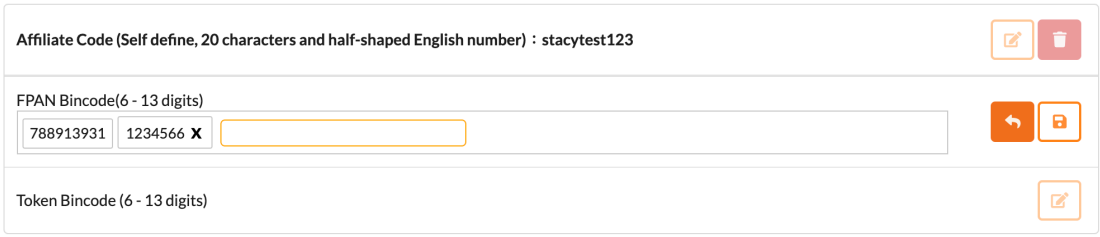
3.20.3.3. How to change the card number?

For example, Change physical card number from 324234324 to 1234566

Add a new international mobile payment Token Card Number: 134134431556

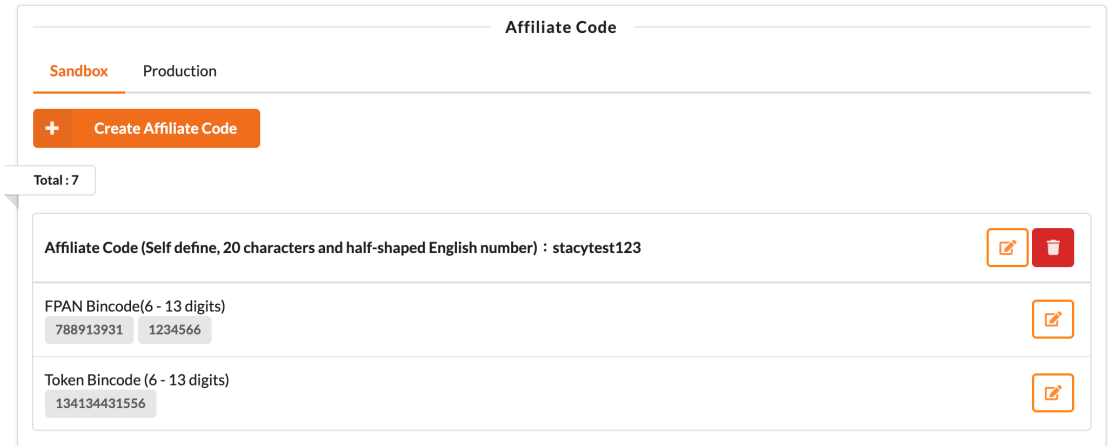
- Physical card number. Click the rightmost button [Edit].

- Click on [X] to delete the physical card number 324234324, and then add a new card number: 1234566. And click [Save].



- A confirmation window pops up. Click [OK].

- International mobile payment Token card number can be edited as well. Click the rightmost button [Edit], add a new card, and click [OK] to confirm. It is updated immediately (same as steps above).

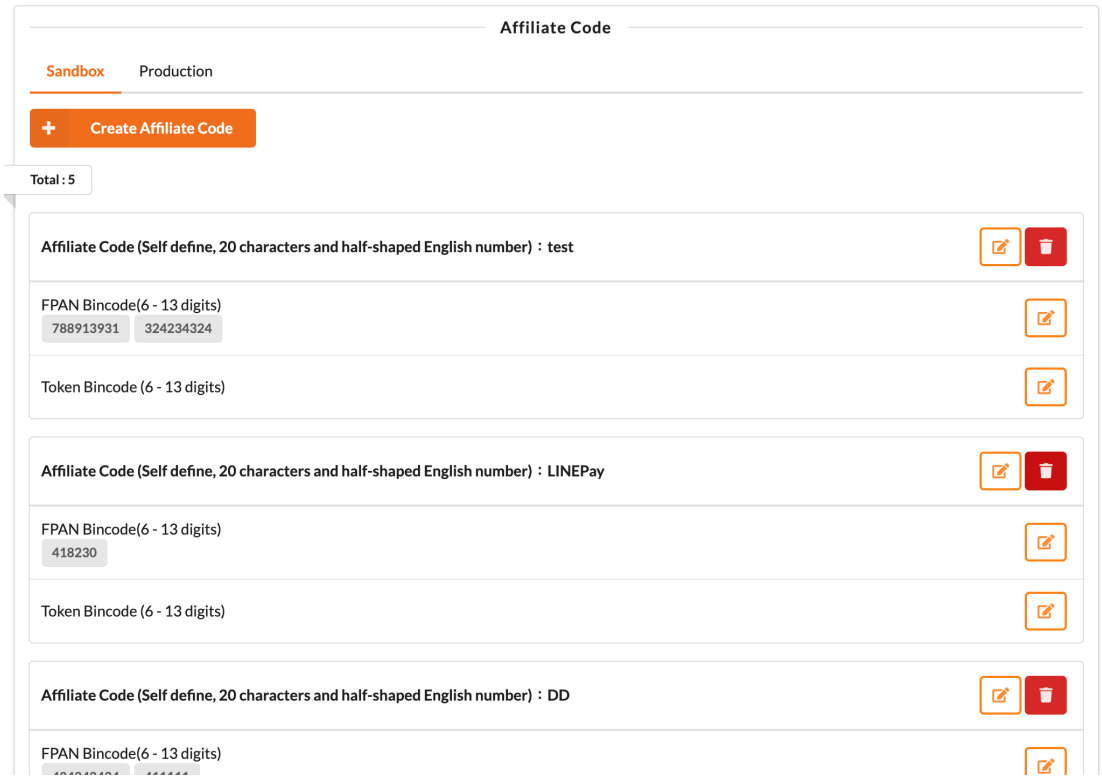


3.20.3.4. How to delete an Affiliate Code?

- To delete Affiliate Code: test, click the rightmost button [Delete]

- A confirmation window pops up. Click [OK] to delete.

- It is deleted immediately. The Affiliate Code: Stacytest123 has disappeared.

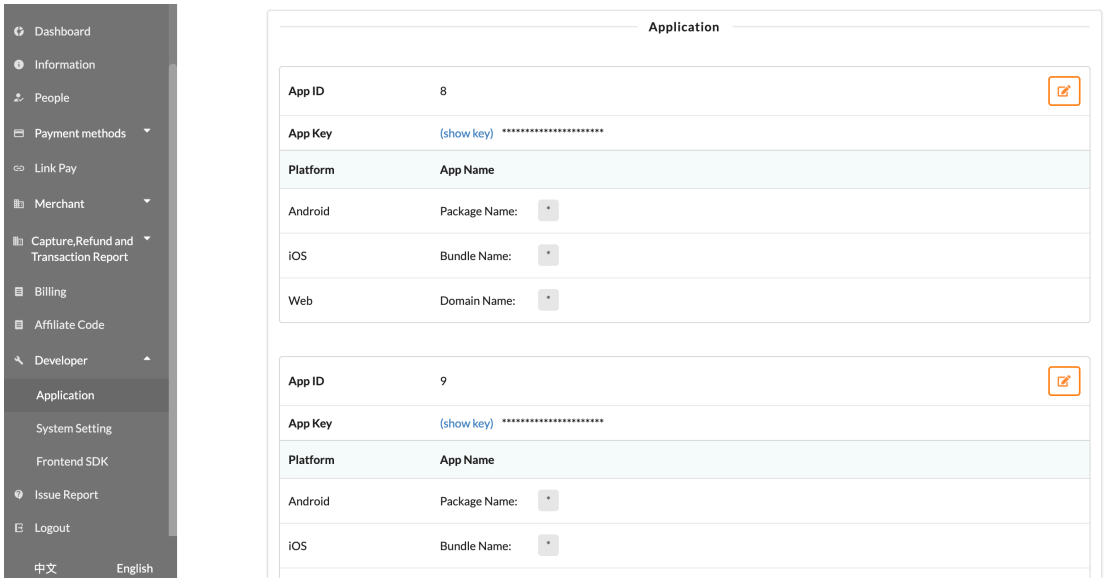


3.21. Developer > Application

3.21.1. Function Description

The AppID and AppKey that are used in Frontend integration can be found here. You can configure domain settings according to different platforms at the same time.

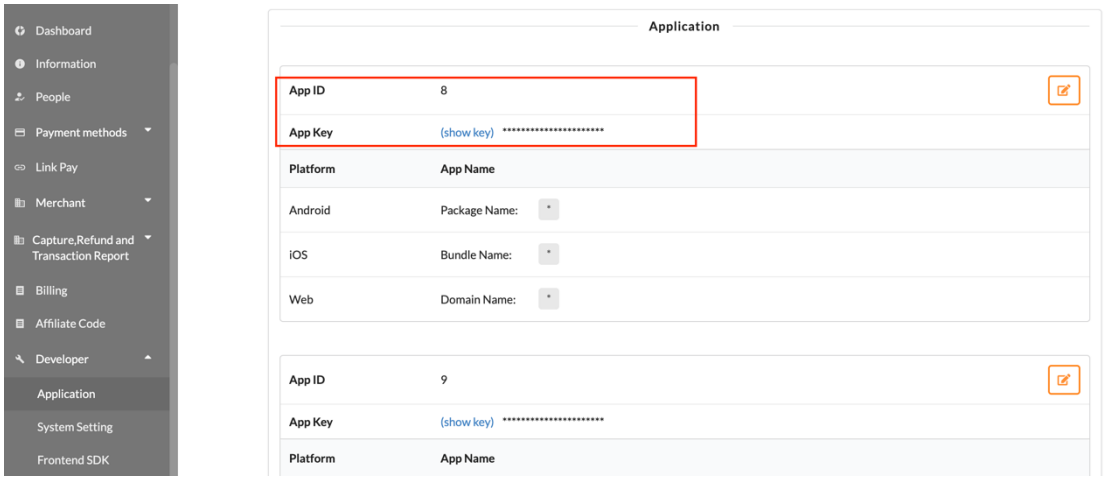
3.21.2. UI Demo



3.21.3. Operating Instruction

3.21.3.1. Where will AppID, AppKey be used?

Frontend integration



SetupSDK

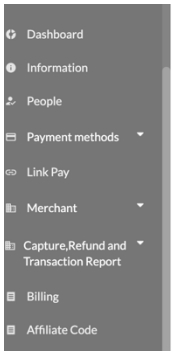
```
TPDirect.setupSDK(appID, appKey, serverType)
```

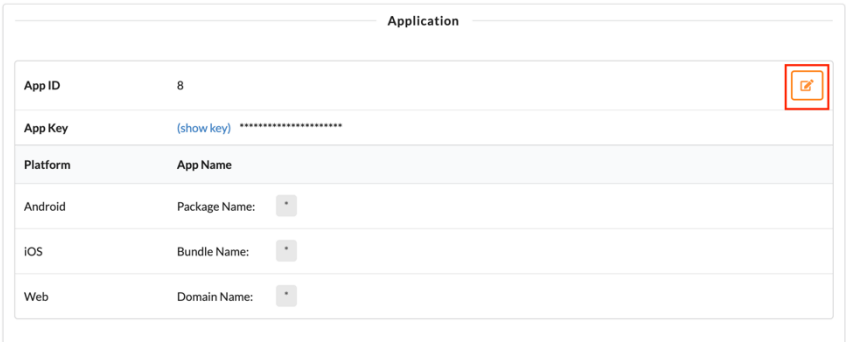
Name	Usage
appID	Please refer to appid
appKey	Please refer to appkey
serverType	Use 'sandbox' for sandbox environment. Use 'production' for production environment.

```
<script src="https://js.tappaysdk.com/tpdirect/v5.5.1"></script>
<script>
    TPDirect.setupSDK(APP_ID, 'APP_KEY', 'sandbox')
</script>
```

3.21.3.2. How to edit the domain for each platform?

- Click the [Edit] button on the top right corner, and then click [Submit] to update. If no changes are needed, just click [Cancel] to cancel.





3.21.3.3. AppID for Link Pay

- When you turn on Link Pay, an additional account will be added automatically and you can see the Domain Name as link-pay.tappaysdk.com in Platform > Web.
  *Important: If you accidentally delete the domain link-pay.tappaysdk.com, the transaction will fail when you use Link Pay.

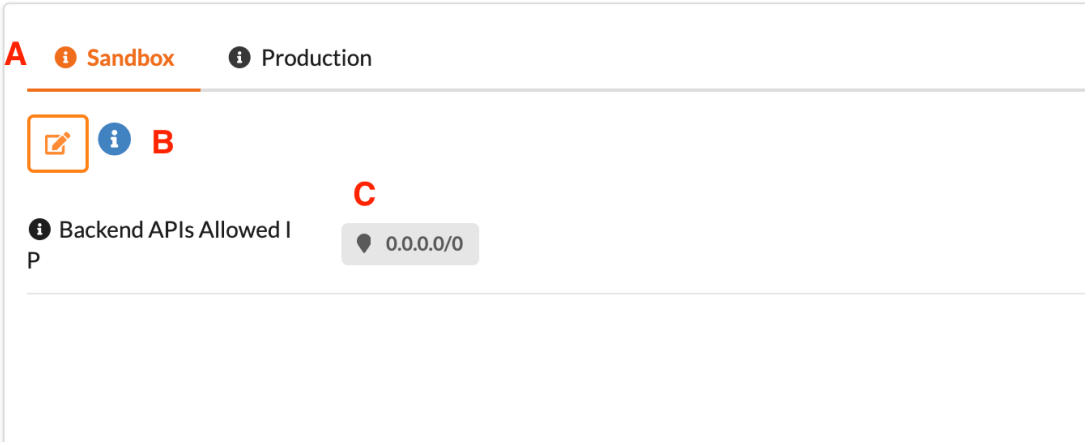
-

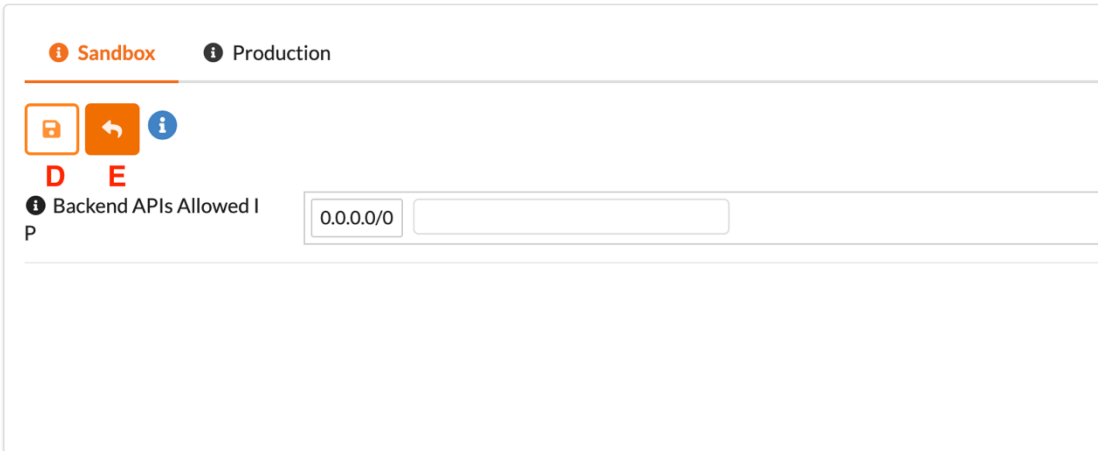
3.22. Developer > System Settings

3.22.1. Function Description

Backend IP settings for sandbox and production environment have to be set up here before you conduct any transaction.

3.22.2. UI Demo



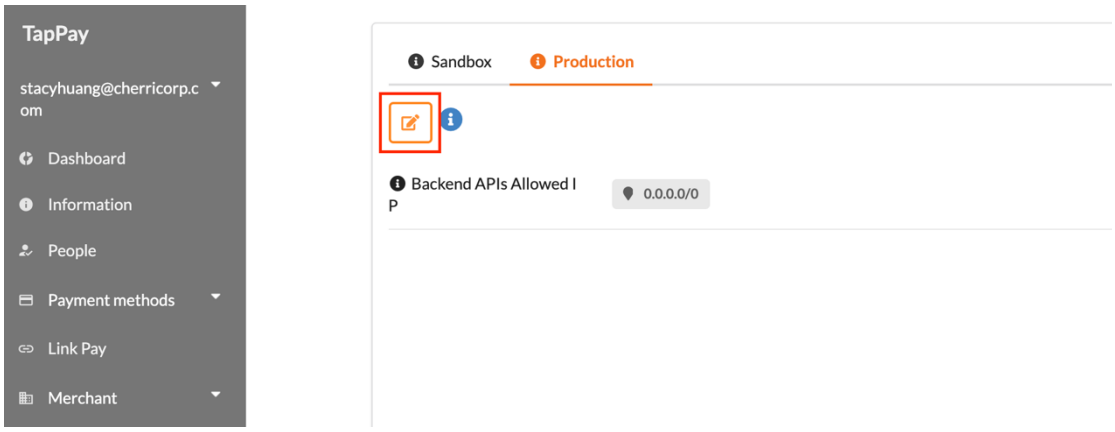


No.	Function	Description
A	Sandbox/Production	Switch between sandbox and production
B	Edit button	Edit IP
C	IP setting	Show IP setting
D	Save	Save changes of IP setting
E	Back	Go back

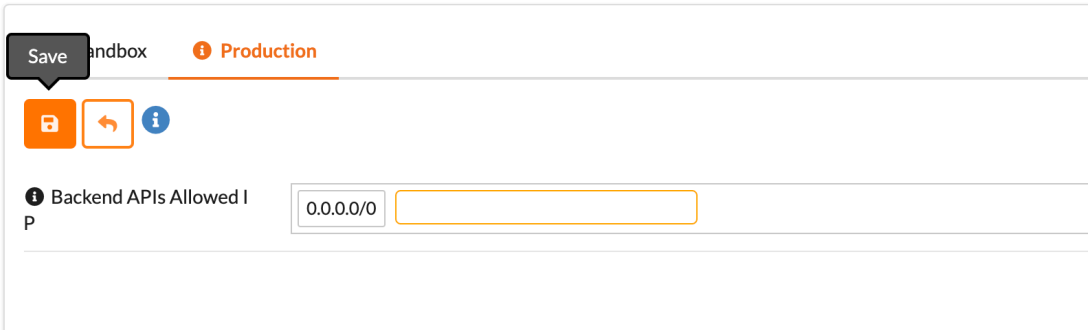
3.22.3. Operating Instruction

3.22.3.1. How to change the system settings?

- TapPay system has a testing environment as well as a production environment, you can go to Developer > System Settings > System Environment Settings to configure the IP settings.



- Click [Edit] at the top left corner to start editing. When it is done, click [Save] to save, otherwise, click [Back] to cancel the changes.



3.23. Developer > Frontend Kit

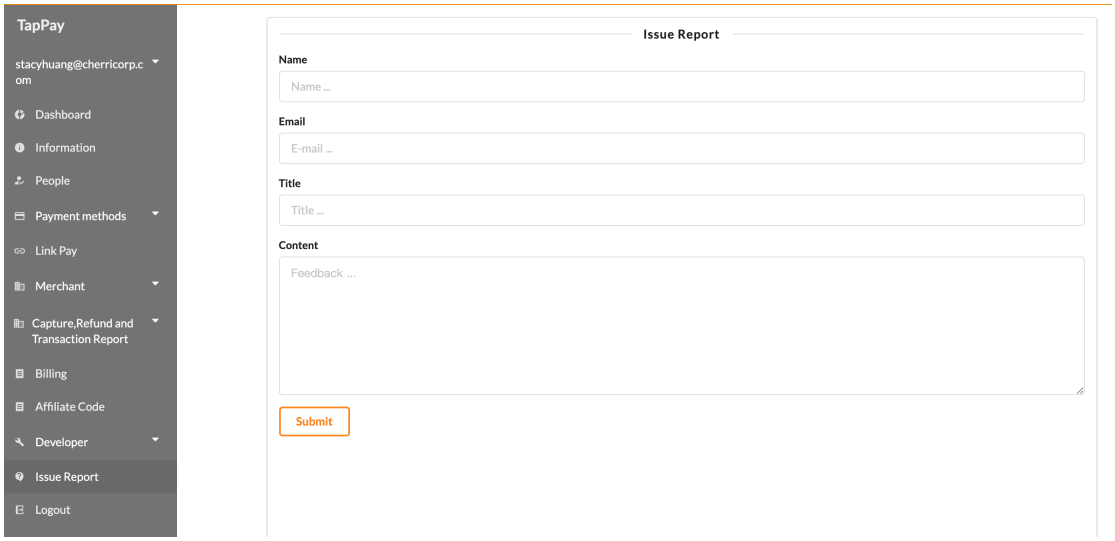
A description of the TapPay Frontend Kit can be found here. For more detailed integration documents, please go to https://docs.tappaysdk.com/tutorial/zh

3.24. Issue Report

3.24.1. Function Description

If you have any question about Portal, please feel free to send us an issue report. We will reply to you in a few days.

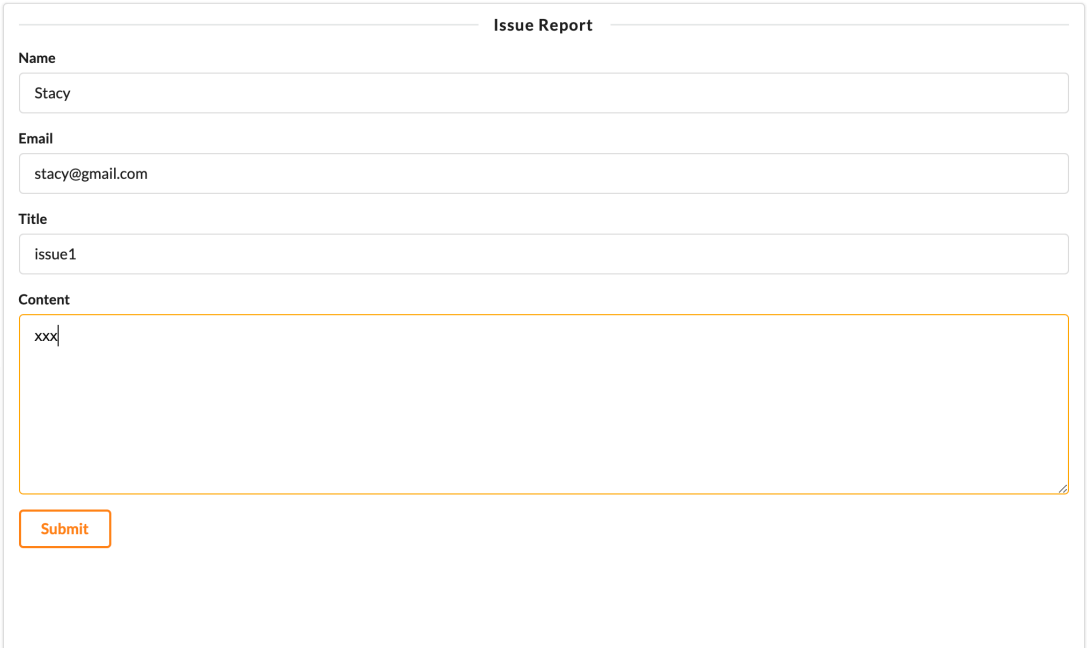
3.24.2. UI Demo



3.24.3. Operating Instruction

3.24.3.1. How to submit an issue report to TapPay?

- Please go to Menu > Issue Report, fill in the required information below and click [submit]

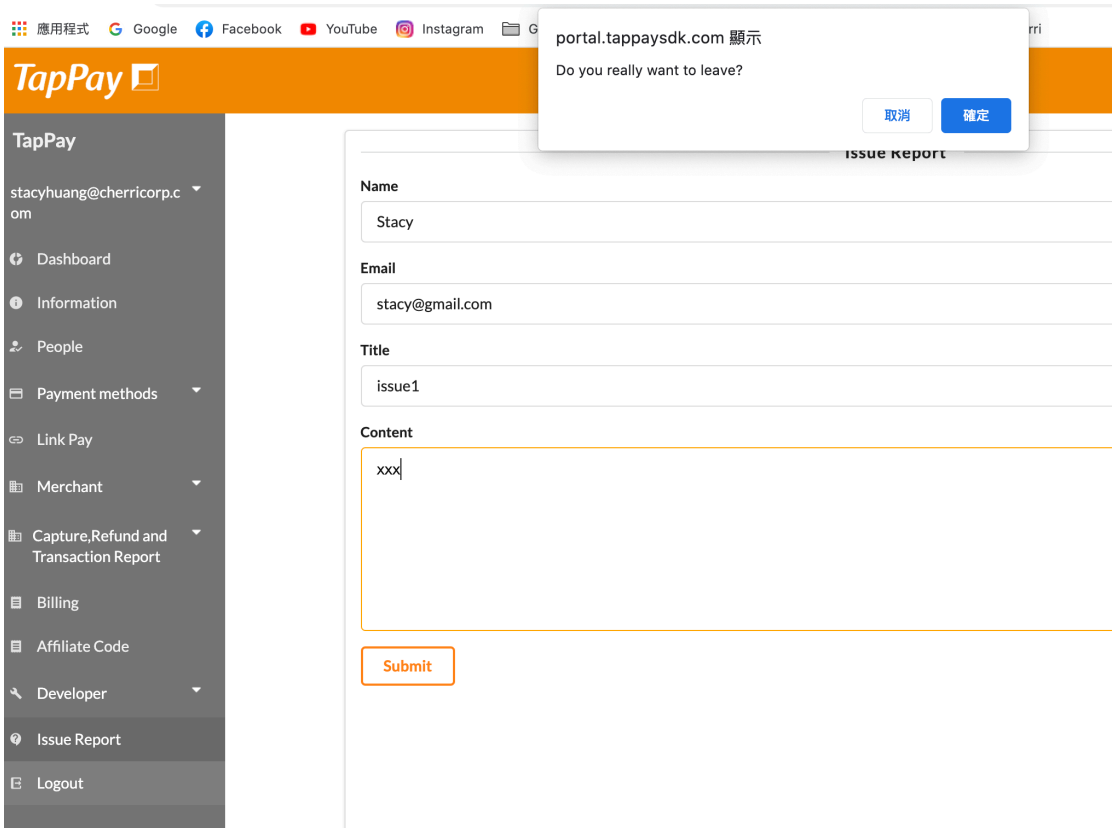


3.25. Logout

3.25.1. Function Description

Click to log out of TapPay Portal.

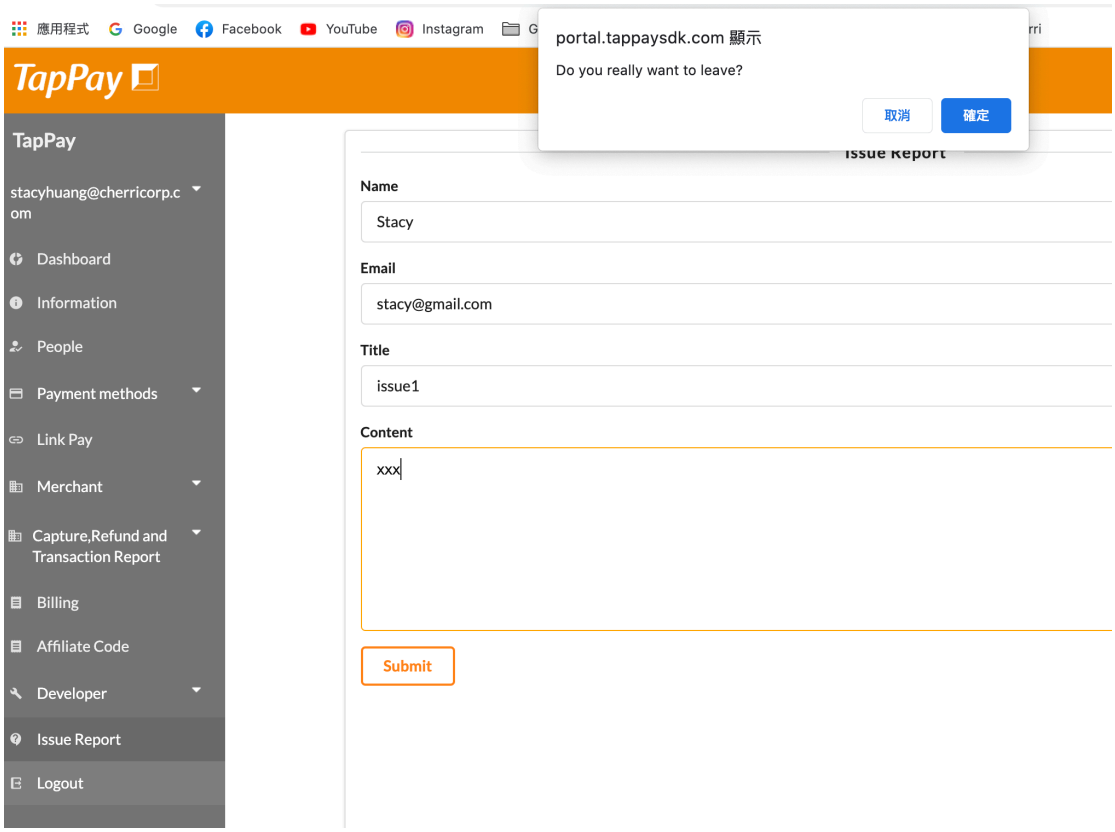
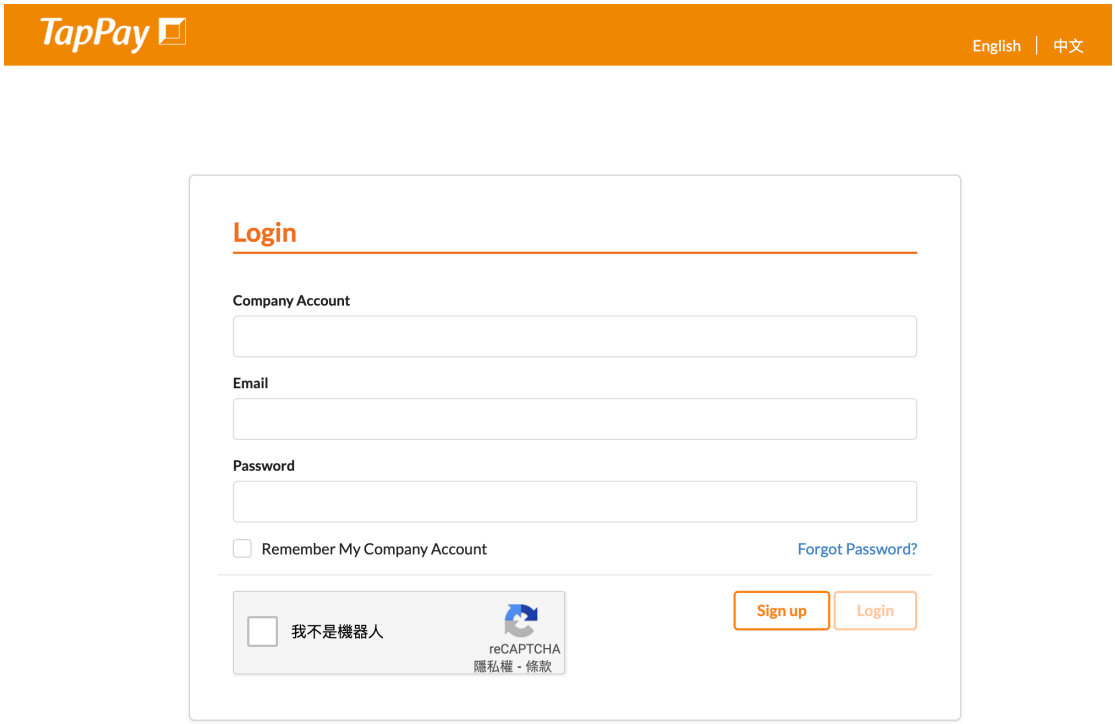
3.25.2. UI Demo



3.25.3. Operating Instruction

3.25.3.1. How to log out of Portal?

- Please go to Menu > Logout, a confirmation window will pop up.



- Click [OK], you will log out and be redirected to the login page.