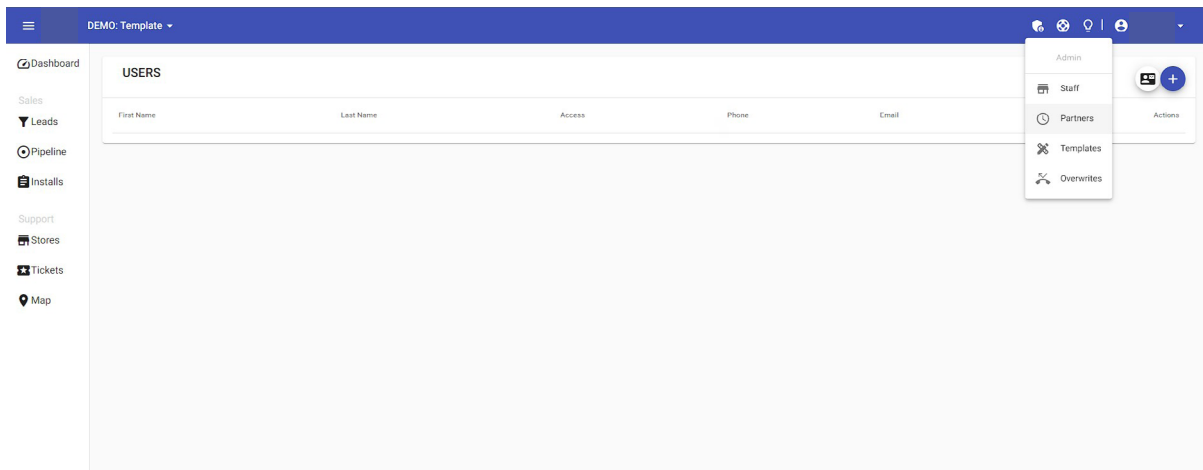


How to Add A New Partner

1. Go to admin, partner



2. Click on Add +



How to Add New Staff

3. Add staff:

Cedar Rapids IA 24900400000176626

Add Partner ✓ X

Name Phone

Ordyx Email Buy Rate %

Flat Percent Desk Id

City State

4. Go to account, access.

DEMO: Template

clam@boldpay.io

Company

Settings

Access

Billing

Activity

Logout

Name	City	State	Desk ID
Paid in Full	Cedar Rapids	IA	24900400000176626
Ordyx House	Deerfield Beach	FL	24900400017780001
All Computer Systems	Greenville	SC	249004000069520041
Finetech	Atlanta	GA	24900400046541013
Merchant Services	Deerfield Beach	FL	24900400049099001
Condor Pos	Calgary	AB	249004000055913033
Cutting Edge Systems	Richmond	VA	249004000069520023
DEMO: Template	Atlanta	GA	249004000073125035
Ambit Technologies	Panama City	FL	249004000073260001
OK POS	Oklahoma	OK	249004000073497001

5. Go to admin, staff

Admin

Staff

Partners

Templates

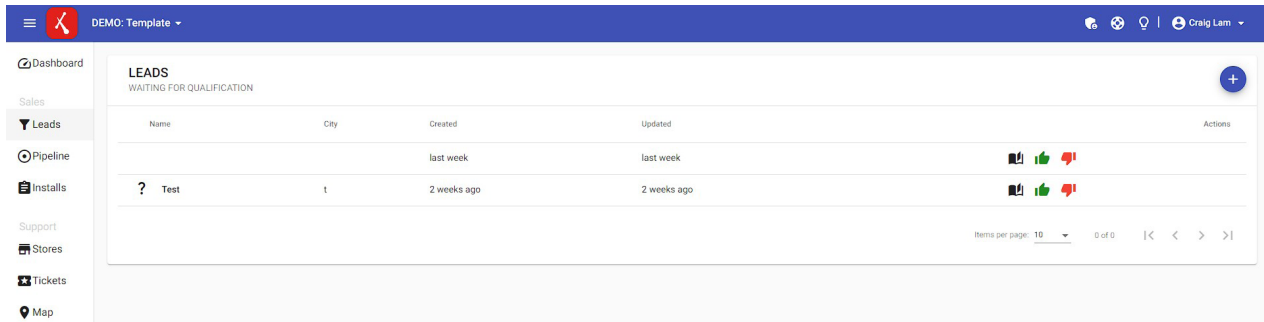
Overviews

First Name	Last Name	Access	Phone	Email
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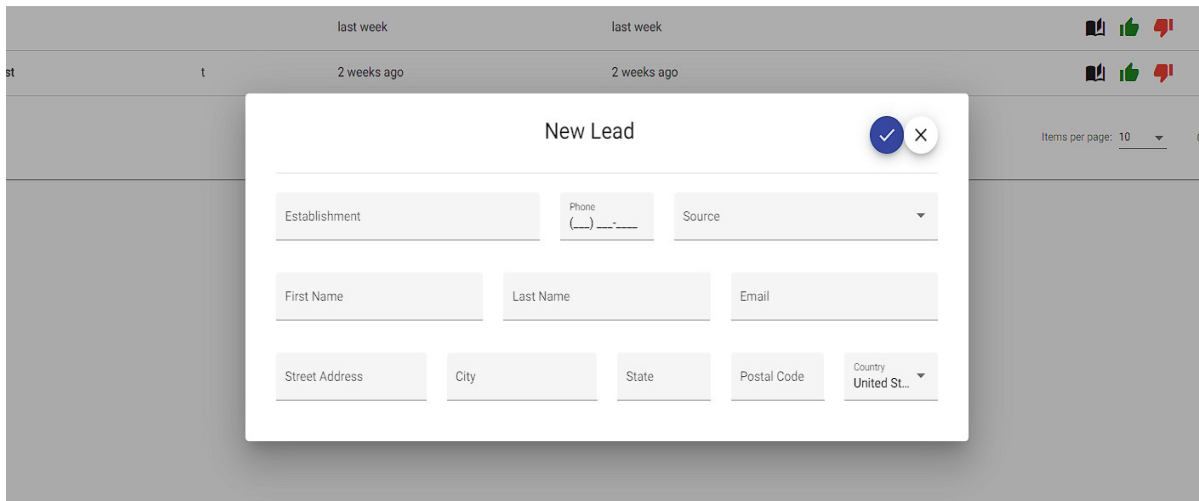
All rights reserved © 2023 ORDYX

How to Add a New Store

1. Add it under the leads:



2. Create a new lead:



How to Qualify a Lead

DEMO: Template

LEADS
WAITING FOR QUALIFICATION

Name	City	Created	Updated	Actions
		last week	last week	
? Test	t	2 weeks ago	2 weeks ago	

Items per page: 10 0 of 0 |< < > >|

2 weeks ago

2 weeks ago

Deal name

Amount
0

Qualification notes

JUN 2023

S M T W T F S

JUN

1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30

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How to Qualify a Lead

Once qualified, it will move down to the pipeline. From the pipeline, the store configurations can be added:

The screenshot shows a mobile application interface for adding store configurations. At the top, there is a progress indicator showing 10% completion, the date May 5, 2023, and the time 3 weeks ago. The main content area is titled "asf" and features a red refresh icon on the left and a close button (X) on the right. Below the title is a horizontal menu with three items: "Establishment" (selected), "Address", and "Owner". The "Establishment" section is active and displays the text "Verify establishment information:". Below this, there are four input fields: "Name" (containing "asf"), "Phone" (with a placeholder "() - - - -"), "Service" (a dropdown menu), and "Offering".

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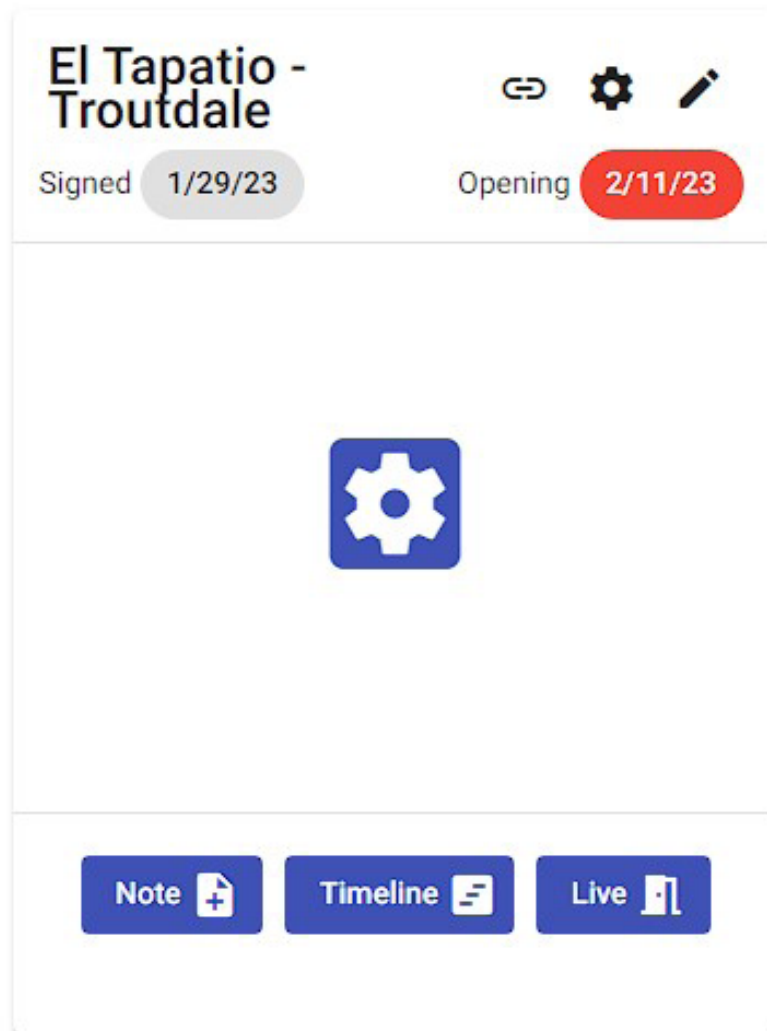
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How to Edit or Copy Settings

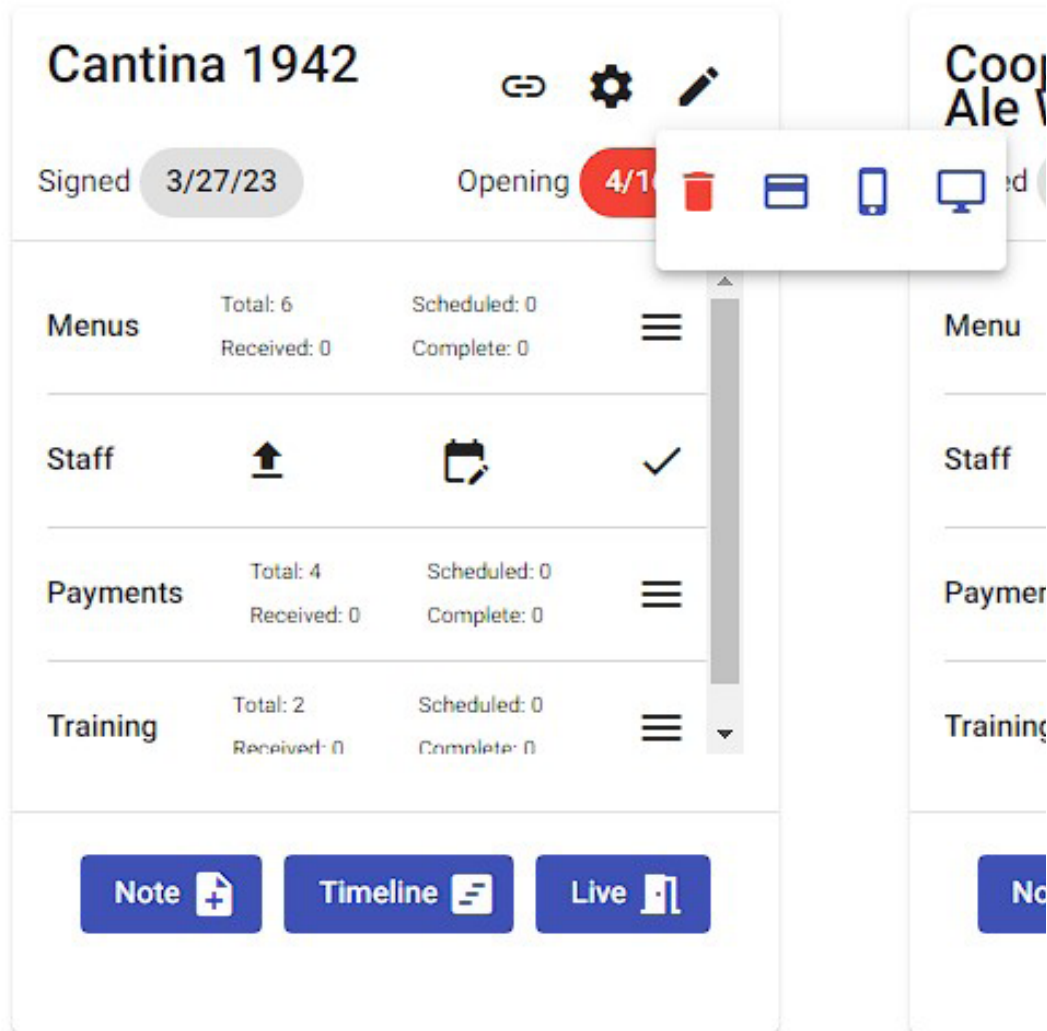
Once we get the payment, it automatically moved to the install tab.

Under installation, it will be able to define or copy the settings from an existing store:



How to Provision Handheld, Stations and EMV

If, for some reason, you need to add more HH, stations or EMV:



How to View Live Stores

From the store tab, they can see all live stores, and they will be able to add new HH, stations, and EMV from there:

LIVE STORES Active Cancelled

Store	Opened	Closed	Total	Actions
Renato's	23 Hours Ago	13 Hours Ago		
Pizza al Fresco	23 Hours Ago	13 Hours Ago		
Koiya Japanese Express	14 Hours Ago		\$83.88	
Paradiso Restaurant	12 Hours Ago			
Piccolo Mondo	19 Minutes Ago		\$136.75	
Ayl Jalisco II	13 Hours Ago			
La Costa-HIBERNATION	10 Months Ago	9 Months Ago	\$3.38	
Safa Express Jupiter-HIBERNATION	Last Year	Last Year	\$1,353.82	
Koiya Japanese Exp. Vidalia-HIBERNATION	2 Years Ago	2 Years Ago		
Las Carnitas	Yesterday	11 Hours Ago		

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How to Make the Store Live

Once they complete the installation process and the customer is ready to use the system, they need to mark the store live:

