



Chase POS

Merchant Portal User Guide

Grow your business – whenever and wherever you want in Canada!

April 25, 2024

Contents

Welcome to Chase POS	4
Getting Started	5
<i>Signing In</i>	6
Managing Your Staff	7
<i>Adding a Staff User</i>	7
<i>Viewing your Staff List</i>	9
<i>Viewing a Staff Member's Profile</i>	10
Editing Staff Accounts	11
<i>Edit a Staff Member's Profile</i>	11
<i>Changing a Staff Member's Role</i>	13
<i>Changing a Staff Member's Email</i>	15
<i>Cancel a Staff Member's Email Change</i>	17
<i>Resending a Verification Email</i>	18
<i>Deleting a Staff Member</i>	20
Managing User PINs	22
<i>Viewing the Owner's PIN</i>	22
<i>Changing the Owner's PIN</i>	24
<i>Viewing a Staff Member's PIN</i>	26
<i>Changing a Staff Member's PIN</i>	28
Dashboard	30
Managing Your Product Catalogue	31
<i>Managing Taxes</i>	31
<i>Searching the Product Catalogue</i>	37
<i>Applying Sales Tax</i>	41
<i>Assigning a Product to Categories</i>	44
<i>Adding an Image</i>	47
<i>Enabling or Disabling a Product</i>	50

<i>Tracking Inventory</i>	52
<i>Deleting a Product</i>	55
Managing Categories	56
<i>Adding a Category</i>	57
<i>Editing a Category</i>	60
<i>Deleting a Category</i>	60
Sales History	61
Transaction Details.....	63
<i>Resending a Receipt</i>	64
<i>Downloading a Receipt</i>	65
Viewing Reports	66
<i>Detailed Transactions Report</i>	67
<i>Product Catalogue Sales Report</i>	67
<i>Product Inventory Report</i>	67
Updating Your Personal Profile	68
Changing Your Name.....	68
Changing Your Language.....	68
<i>Changing Your Mobile Number</i>	69
Changing Your Password.....	70
Changing Your Verification Preference	71
Updating Your Merchant Profile	72
Viewing Your Terminals	72
<i>Updating a Terminal's Name</i>	73
<i>Replacing a Terminal</i>	74
Configuring Transaction Settings	74
Receipt Settings	75

Welcome to Chase POS

Chase POS¹ allows you to accept credit and debit card payments² wherever your business takes you in Canada.

All you need is an internet connection, one or more Chase POS terminals, and a merchant account with Chase® Merchant Services.

This user guide will introduce you to the Merchant Portal, where you will be able to manage your Chase POS account, manage your product catalogue, pull reports, track your sales, and more.

Don't have an account?



If you do not have a Chase POS account, please visit <https://merchantservices.chase.ca/en/support> or call 1-866-833-8182 to speak with a Sales Representative.

Getting Started

To use Chase POS, you will need to first set up an account with Chase® Merchant Services. To speak with a Sales Representative, please call 1-866-833-8182.

Once your account has been created, you will be sent a welcome e-mail containing a link to validate your email address.

Clicking this link will prompt you to set the following:

Password

Your password will be used anytime you sign into the Merchant Portal or the Chase POS Terminal application. The temporary password will be sent to you via email that you will need when setting up the password.

You will be prompted to set a password for your account. To maximize the security of your account, you should

- Use a *unique password* for your account.
- *Never share your password* with anyone. Chase will **never** ask for your password.

MFA (Multi-Factor Authentication) Preference

Multi-Factor Authentication, also known as two-factor authentication (2FA) provides an additional layer of security to your account. With MFA you will be asked to enter a verification code by SMS message or using an authentication app such as:

- Google Authenticator
- Microsoft Authenticator
- Twilio Authy

Signing In

Your Chase POS account is secured using your email address, password, and MFA.

When signing into the Chase POS terminal or Merchant Portal, you may also be required to enter a one-time password (OTP). This is a 6-digit code either sent to your mobile number as an SMS or generated by your authenticator app.

To access the Merchant Portal:

1. Go to <https://mychase.ca>
2. Click the **SIGN IN** button.
3. Enter your **Email Address** and **Password** and click **Sign In**.

When the **Remember me** check box is selected, your email address is pre-populated the next time you sign in from the same device.

Forgot your password?



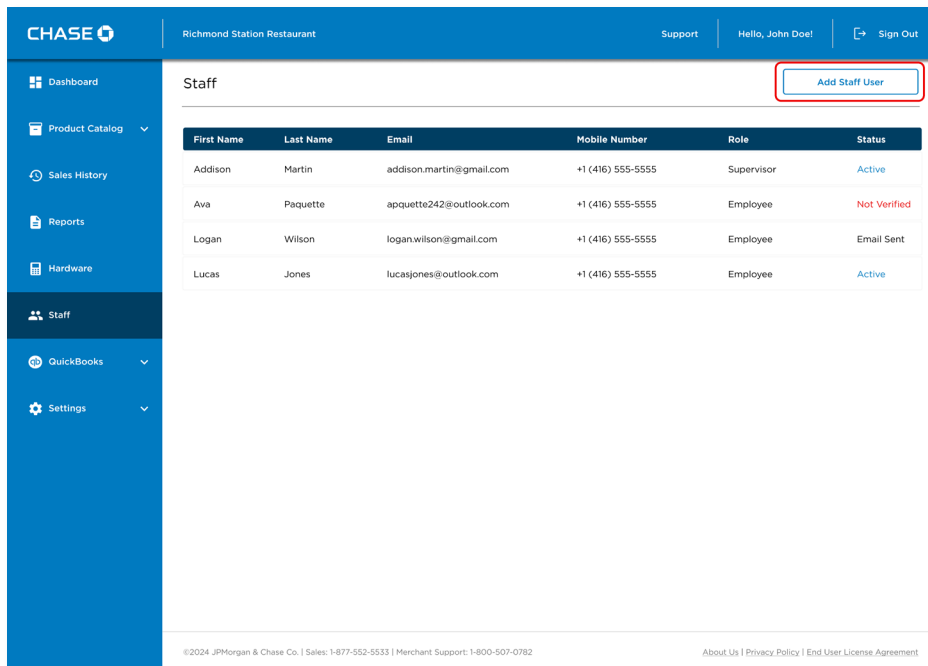
You can reset your password yourself using the Chase POS terminal, via the Merchant Portal at mychase.ca, or by calling Merchant Support at 1-800-265-5158.

Managing Your Staff

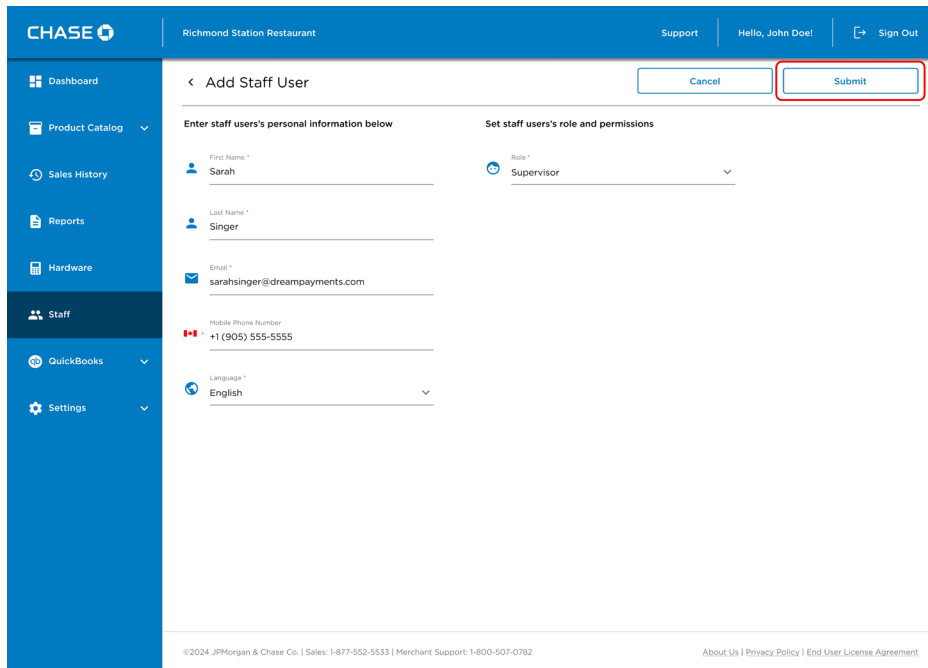
In addition to the Owner account, supervisor and staff accounts can be created for your employees to attribute sales to individual staff members and provide access to process refunds and manage aspects of your business through the merchant portal.

Adding a Staff User

1. Click on the **Staff** menu button from the left panel.
2. Click on the **Add Staff User** button.



3. Enter the following staff details to complete the user profile.
 - i. Staff First Name and Last Name;
 - ii. Email address;
 - iii. Mobile Phone Number;
 - iv. Language (English or French); and
 - v. Staff Role (Supervisor/ Employee).
4. Once you fill out all mandatory fields (*), click on the **Submit** button.



5. You will see a confirmation message on the screen and an email with the account verification link will be sent to the staff user with instructions to complete the verification process.

Viewing your Staff List

1. Click on **Staff** main menu button.

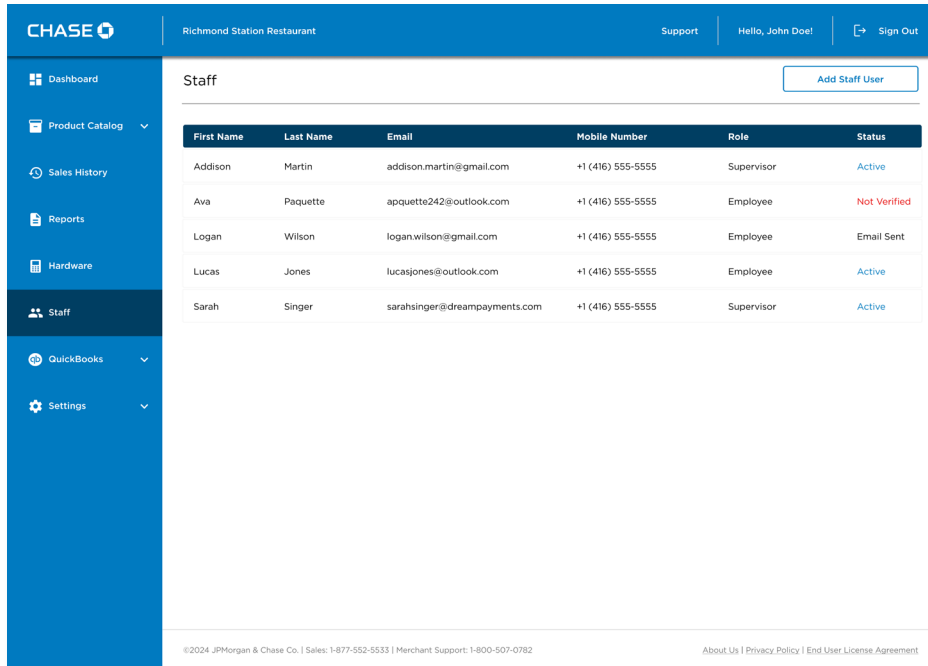
The screenshot shows the Chase POS Merchant Portal interface for 'Richmond Station Restaurant'. The top navigation bar includes the Chase logo, the restaurant name, a 'Support' link, the user name 'Hello, John Doe!', and a 'Sign Out' button. A left-hand sidebar contains a menu with options: Dashboard, Product Catalog, Sales History, Reports, Hardware, Staff (highlighted), QuickBooks, and Settings. The main content area is titled 'Staff' and features an 'Add Staff User' button. Below the button is a table with the following data:

First Name	Last Name	Email	Mobile Number	Role	Status
Addison	Martin	addison.martin@gmail.com	+1 (416) 555-5555	Supervisor	Active
Ava	Paquette	apquette242@outlook.com	+1 (416) 555-5555	Employee	Not Verified
Logan	Wilson	logan.wilson@gmail.com	+1 (416) 555-5555	Employee	Email Sent
Lucas	Jones	lucasjones@outlook.com	+1 (416) 555-5555	Employee	Active
Sarah	Singer	sarahsinger@dreampayments.com	+1 (416) 555-5555	Supervisor	Active

At the bottom of the page, there is a footer with the text: '©2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782' and 'About Us | Privacy Policy | End User License Agreement'.

Viewing a Staff Member's Profile

1. Click on the Staff member from the staff list.



The following are various statuses that apply to the user.

Email Sent	The registration email has been sent but the user has not clicked the link to verify their email address.
Not Verified	The user has verified their email address but not set their password or verification preference.
MFA Required	The user has set the password but has not set their verification preference yet.
Active	The user has completed registration and can sign in to perform transactions.
Suspended	The user's account has been suspended by the merchant owner and cannot sign in to the Merchant Portal or Mobile App.
Deleted	The user's account has been deleted by the merchant owner and cannot sign in to the Merchant Portal or Mobile App.

Once the account is successfully created, a unique User PIN will be assigned to the staff account. You may reveal this pin by pressing “Show”.

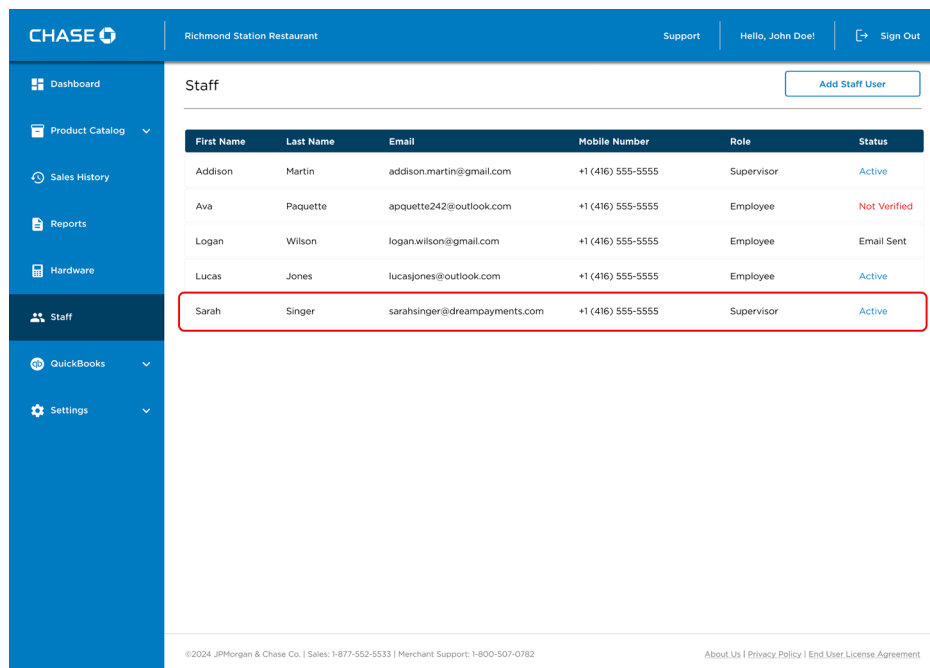
NOTE: These PINs are used to validate refunds. It is up to you as a Merchant to distribute these PINs safely and securely to your staff members as needed. For more information see [User PIN Management](#) for more information.

Editing Staff Accounts

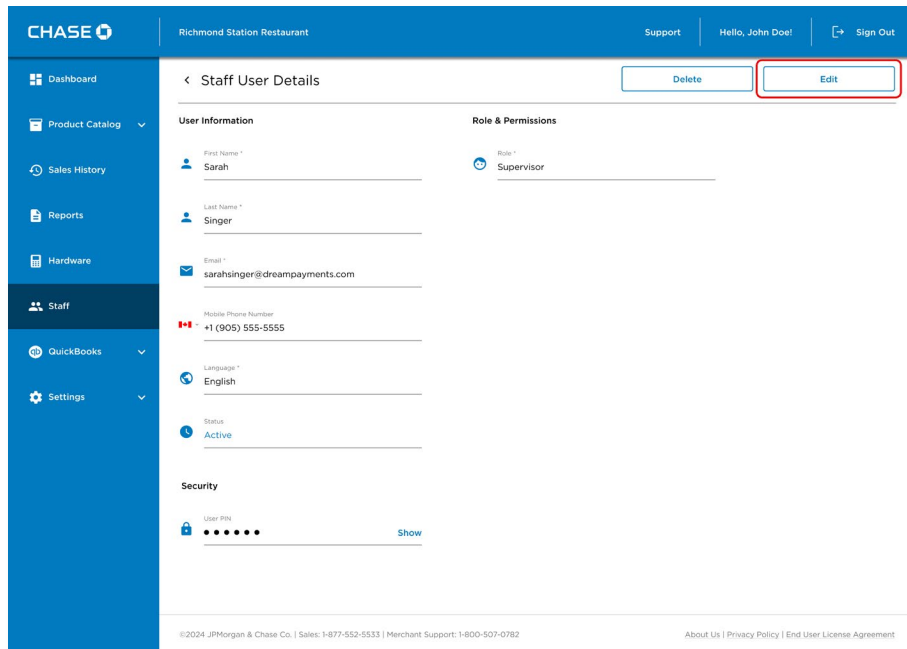
You can edit your existing Staff Users (Supervisors and Employees) through the Merchant portal.

Edit a Staff Member's Profile

1. Click on the **Staff** menu button from the left panel.
2. *Select the staff account for editing from the staff user list on the merchant portal dashboard.*



3. Click on the **Edit** button.



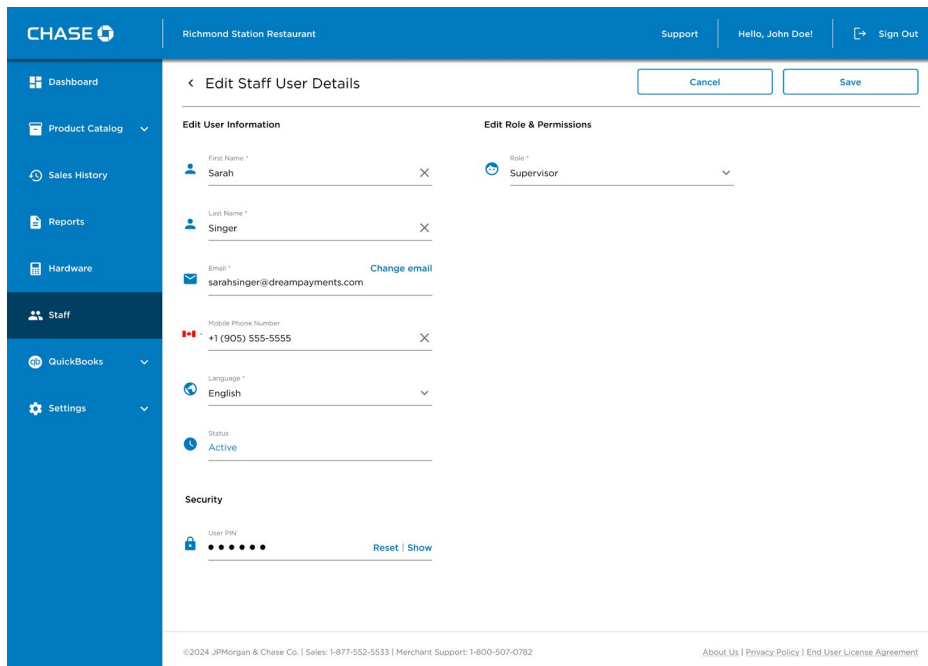
4. You may update the Staff user's **Name** by modifying the First and Last name fields.
5. You may also update the staff user's **Language** preference of a user to English or French. The language preference applies to both the Merchant Portal and Mobile App.
6. You may also change the staff's **Mobile phone number**. This information can be used if staff prefers to set MFA preference to SMS verification.
7. For changes to the user role and email, see the **Change Email and Change Role** sections.
8. Click on the **Save** button to apply changes to the staff profile.
9. You will see a message confirming that the changes are applied to the staff account.

Changing a Staff Member's Role

You can change the role of any of your staff members through the merchant portal by editing the staff user account.

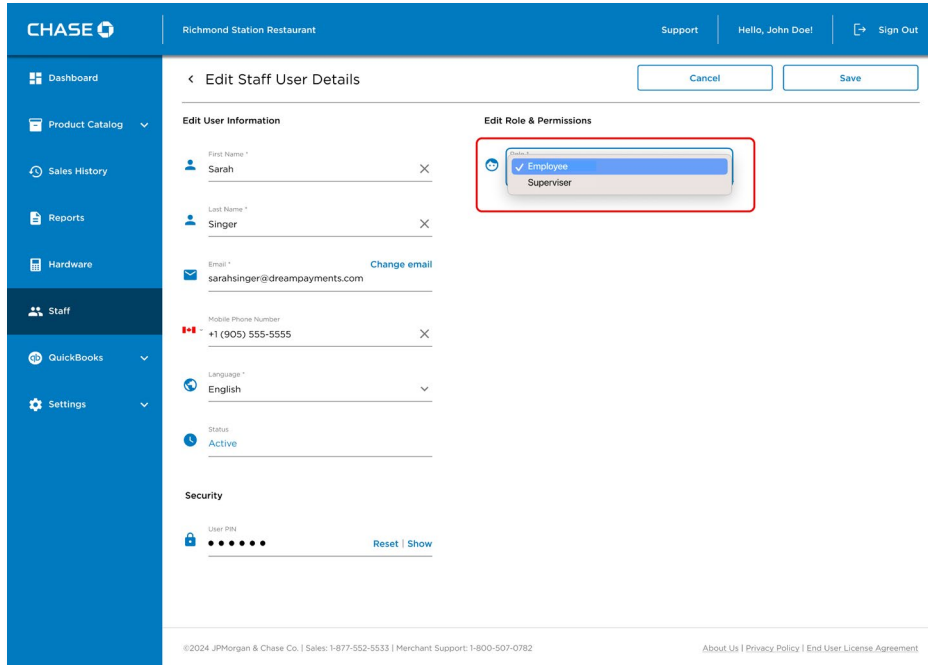
To Change Staff Role:

1. Click on the **Staff** button on the left panel.
2. Select the staff account whose role you need to change.
3. Click on the **Edit** button and the staff account will be available in edit mode to make the required changes.



The screenshot shows the 'Edit Staff User Details' page for a user named Sarah Singer. The page is divided into two main sections: 'Edit User Information' and 'Edit Role & Permissions'. The 'Edit User Information' section includes fields for First Name (Sarah), Last Name (Singer), Email (sarahsinger@dreampayments.com), and Mobile Phone Number (+1 (905) 555-5555). The 'Edit Role & Permissions' section includes a Role dropdown menu set to 'Supervisor', a Language dropdown set to 'English', and a Status dropdown set to 'Active'. There is also a 'Security' section with a User PIN field. The page has a blue header with the Chase logo and 'Richmond Station Restaurant' name, and a blue sidebar with navigation options like Dashboard, Product Catalog, Sales History, Reports, Hardware, Staff, QuickBooks, and Settings. The footer contains copyright information and links for About Us, Privacy Policy, and End User License Agreement.

4. Click on the **User** role dropdown under the *Roles and Permissions* section and select the new staff role.



5. Click on the **Save** button to save the changes against the staff account.

Note: The staff's new role will take effect when the staff user logs in again to the system /mobile application.

6. You will see a confirmation message on the screen that the staff role has been successfully changed.

7. You can view the changes in the staff account once the changes are saved.

Changing a Staff Member's Email

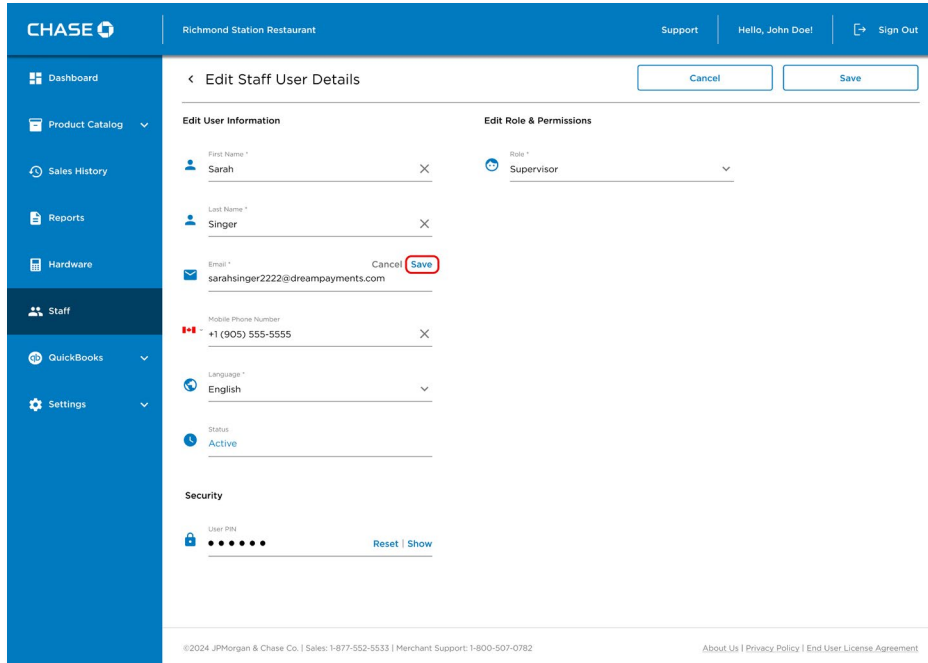
You can change the email address of any of your staff members through the merchant portal by editing the staff user account.

To Change Staff email:

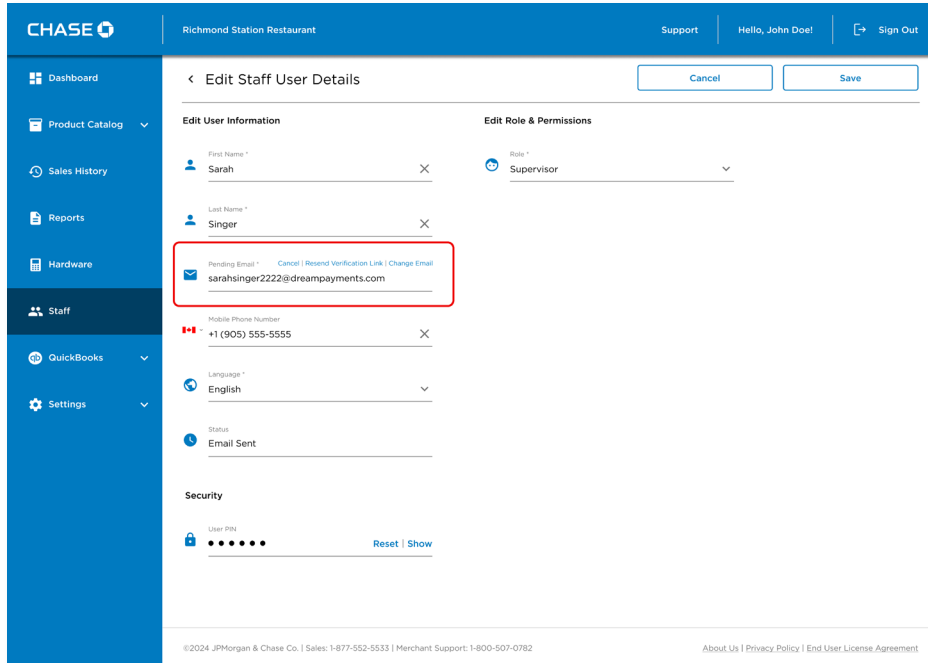
1. Click on the **Staff** button on the left panel.
2. Select the staff account whose email you need to change.
3. Click on the **Edit** button and the staff account will be available in edit mode to make the required changes.

The screenshot displays the 'Edit Staff User Details' interface. The left sidebar is highlighted on the 'Staff' option. The main content area is divided into 'Edit User Information' and 'Edit Role & Permissions'. The 'Edit User Information' section contains fields for First Name (Sarah), Last Name (Singer), Email (sarahsinger@dreampayments.com), Mobile Phone Number (+1(905) 555-5555), Language (English), and Status (Active). A red box highlights the 'Change email' link next to the email field. The 'Edit Role & Permissions' section shows the Role (Supervisor). At the bottom, there is a 'Security' section with a User PIN field and 'Reset | Show' options. The top navigation bar includes the Chase logo, merchant name, support link, user name, and sign out button. The footer contains copyright information and links for About Us, Privacy Policy, and End User License Agreement.

4. Click on the **Change Email** link against the email field.



5. Update the new email address in the email field and click on the **Save** link on the email field to save the changes.
6. You will see a message confirming that the new email address has been saved on the staff account and an email has been sent to the staff user as well.
7. Once you click on the Save button on the staff profile, a message will be displayed confirming that changes have been added to the staff account.
8. The email status on the staff account will be changed to 'Pending Email' and will be updated once the staff user completes the email verification process.

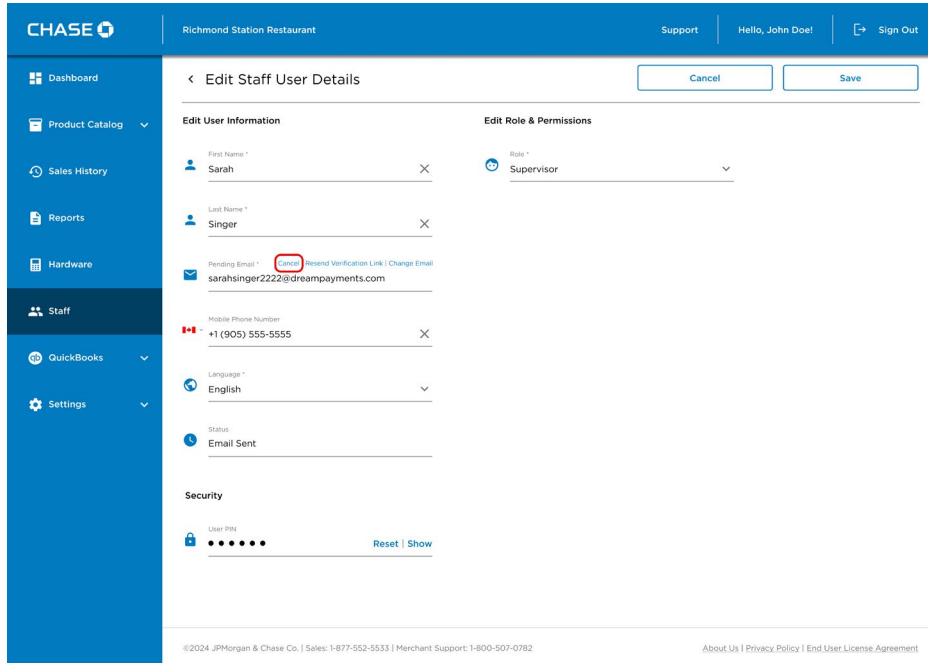


Cancel a Staff Member's Email Change

You can cancel the change in the email address before the staff user verifies the new email.

To Cancel email change:

1. Click on the **Staff** button on the left panel.
2. Select the staff account whose email change you need to cancel.
3. Click on the **Edit** button and the staff account will be available in edit mode to make the required changes.
4. Click on the **Cancel** button next to the Pending email field.



5. Once you cancel the email change, you will see a message asking for confirmation for cancelling the changes previously made to the staff email address.
6. Click on **Yes** to confirm and a message will be displayed informing that the changes have been cancelled and the last saved email address is restored against the staff account.
7. Click on the **Save** button on the staff profile to save all changes to the profile.
8. You will see a confirmation for an updated staff account.

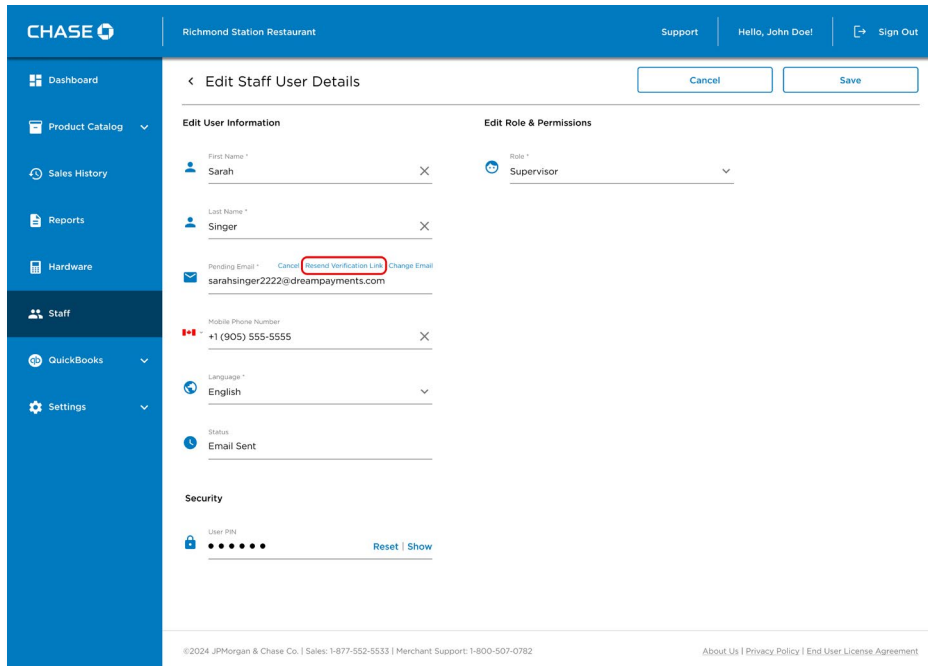
Resending a Verification Email

You can resend the verification email to the staff account, in case the email is not received or missed by the staff user from the merchant portal.

To resend the verification email:

1. Click on the **Staff** button on the left panel.

2. Select the staff account to whom the verification email needs to be resent.
3. Click on the **Edit** button and the staff account will be available in edit mode to make the required changes.
4. Click on the **Resend Verification email** link next to the Pending email field.



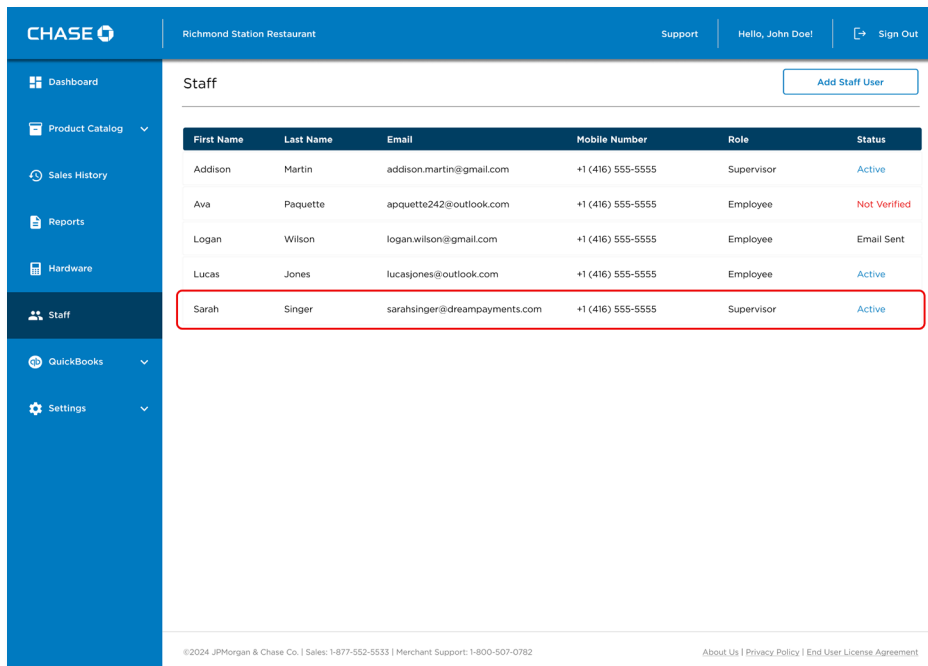
5. A verification email will be sent again to the staff email address, and you will see a confirmation message on the merchant portal screen.
6. The Staff user needs to open the email and click on the Verify Email Address in the email to verify the new email address.

Deleting a Staff Member

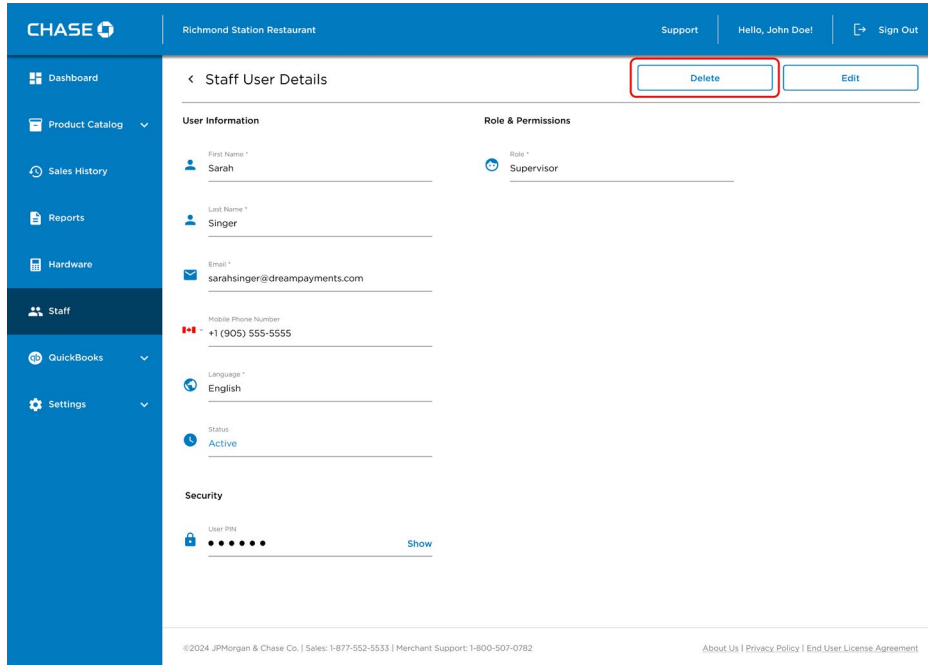
You can delete any of your staff's accounts from the merchant portal. The staff user with the deleted account will then be able to log in to the portal/ mobile application.

To delete staff account:

1. Click on the **Staff** button on the left panel.
2. Select the staff account that needs to be deleted.



3. Click on the **Delete** button on the staff profile screen.



4. You will see a confirmation message informing you that the staff account has been deleted.
5. You will also receive an email with information that the staff account has been deleted.

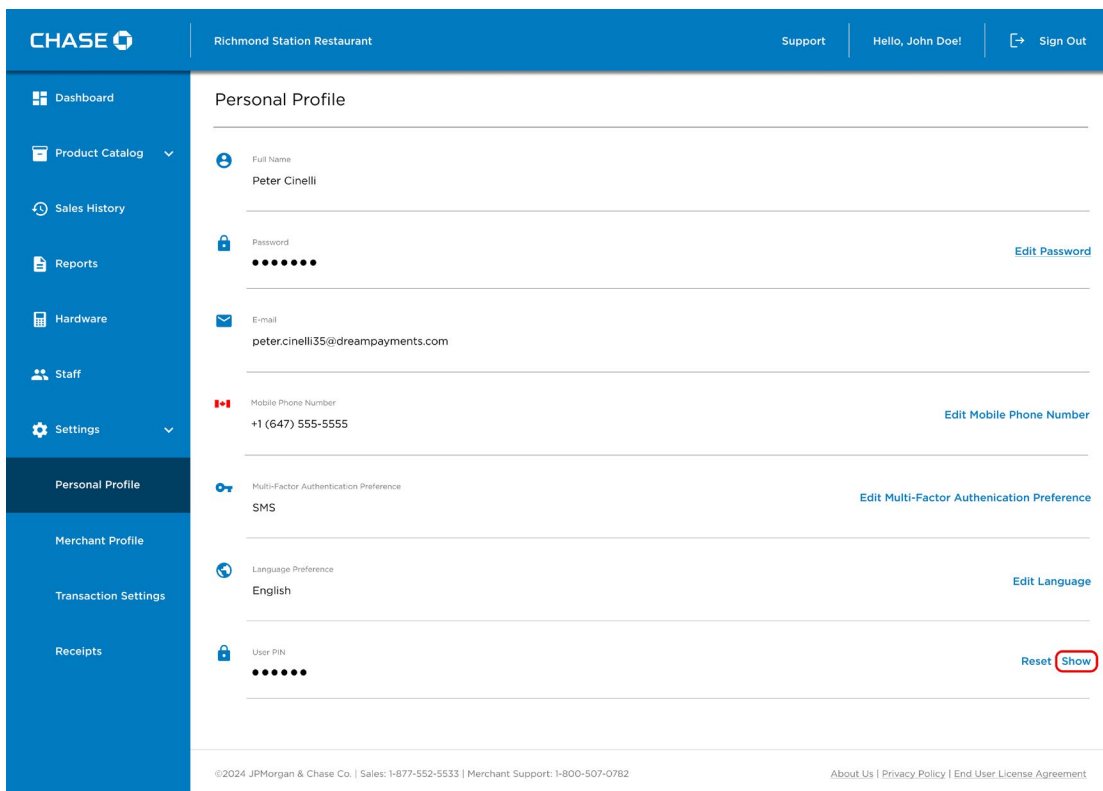
Managing User PINs

Each user is assigned a 6-digit user PIN which allows them to perform refunds. Only the owner can view and reset user PINs. As such it is the Owner's responsibility to securely communicate user PINs to users that they feel should be able to perform refunds.

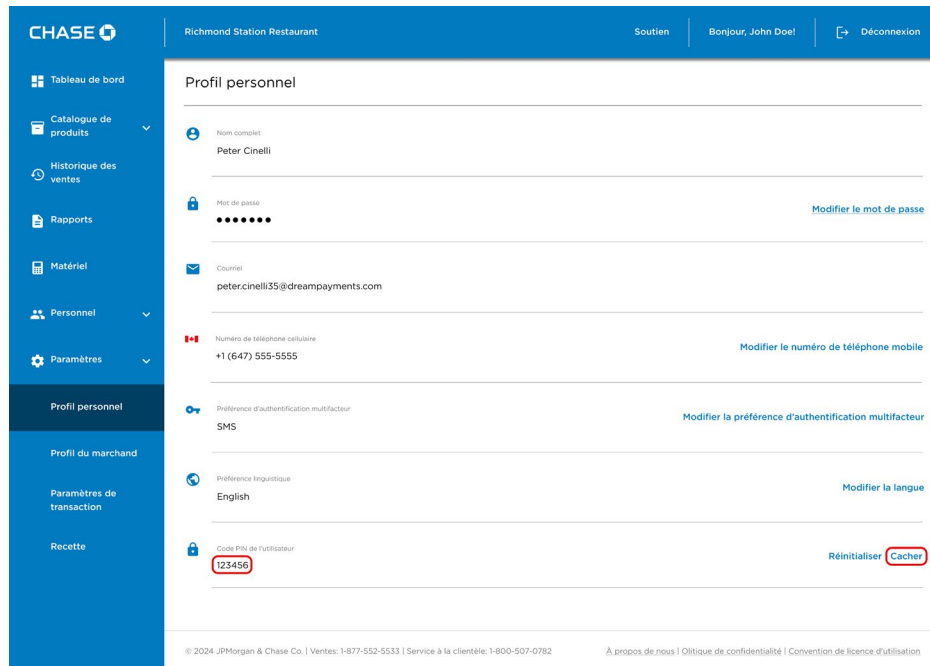
Viewing the Owner's PIN

To View your PIN:

1. Open the merchant portal using your credentials.
2. Go to **Settings** and then click on the **Personal Profile** page.
3. You will see a User PIN field on the page. Click on the **Show** link to view your user PIN, as by default, the user PINs are hidden on the screen.



- Once you click on the show link, your user PIN will become visible to you. You can also click on the **Hide** link to mask it again.

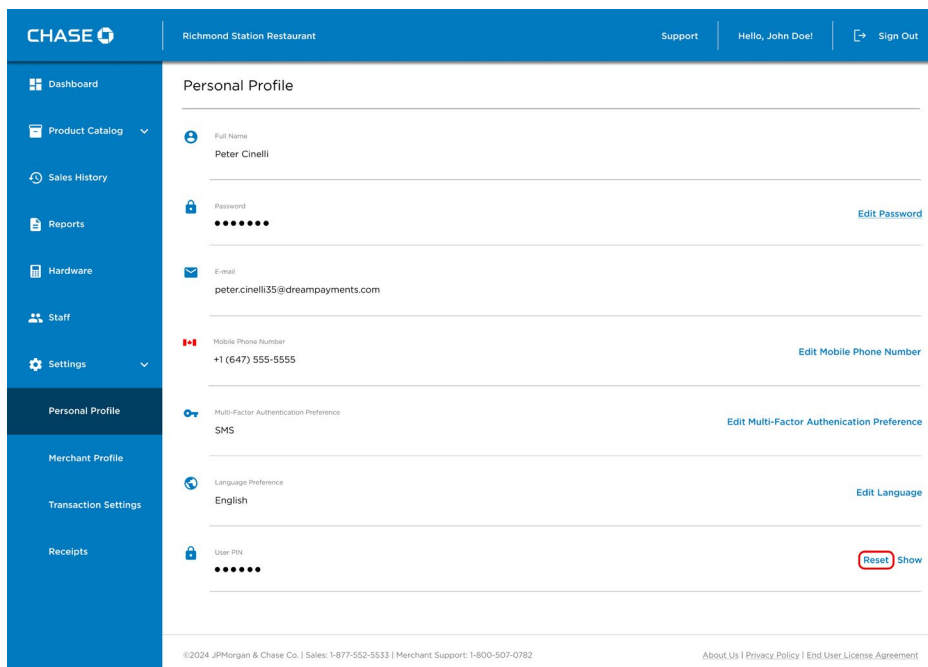


Changing the Owner's PIN

Only you as a merchant owner have the option to change your staff's user PINs through the merchant portal and communicate with them as the staff user cannot view their PINs.

To change your Staff user PIN:

1. Click on the **Staff** button on the left panel of the merchant portal.
2. Select the staff account whose user PIN is needed to be changed.
3. Click on the Edit link to make changes to the staff profile.
4. You will see a **User PIN** field on the staff profile under the **Security** section and by default, the user PINs are hidden on the screen.
5. You can click on the **Show** link to make them visible.
6. Click on the **Reset** link to change the user PIN for the staff account.



7. Once you click on the **Reset** link, the system will generate a new 6-digit user PIN for the staff account, and you will see a confirmation message on the screen.

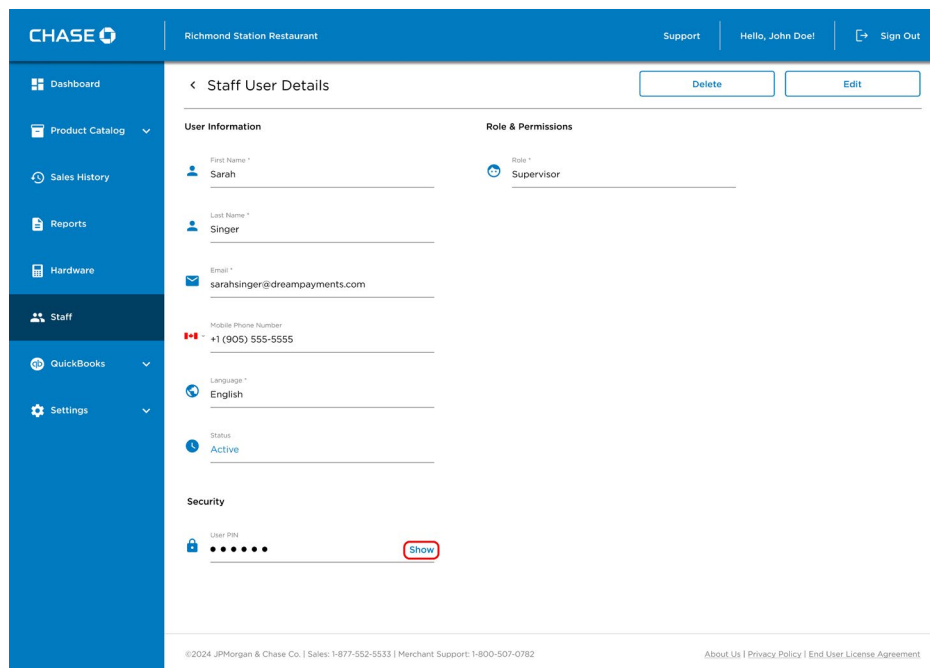
You can then click on the **Show** button to view your new User PIN for the staff account.

Viewing a Staff Member's PIN

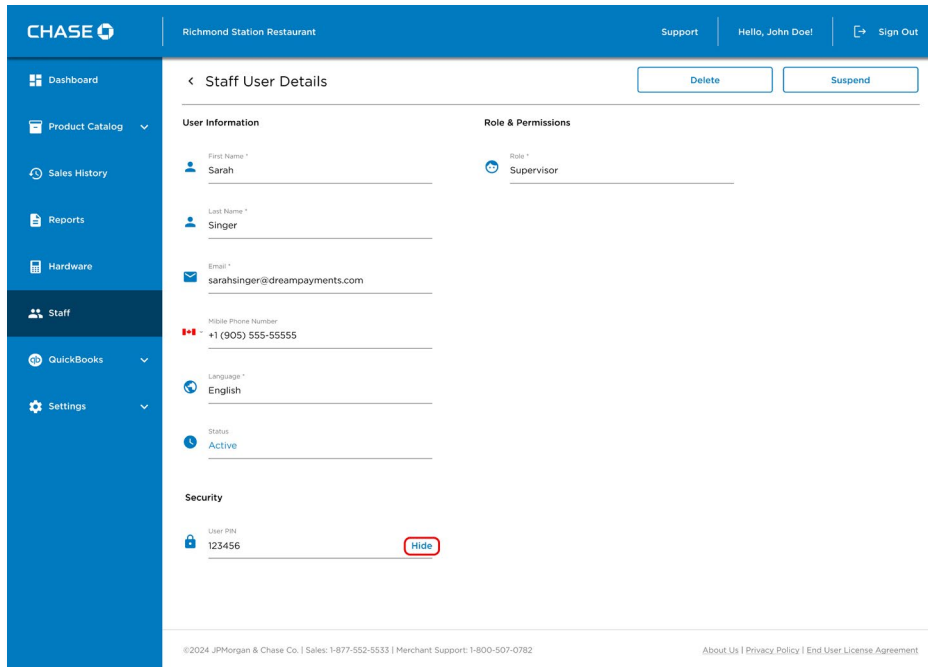
Only you as a merchant owner have the option to manage your staff's user PINs through the merchant portal and communicate them. Staff cannot view their own PINs through the Merchant Portal.

To View your Staff user PIN:

1. Click on the **Staff** button on the left panel of the merchant portal.
2. Select the staff account whose user PIN is needed to be viewed.
3. You will see a **User PIN** field on the staff profile under the **Security** section and by default, the user PINs are hidden on the screen.



4. When you click on the **Show** link on the screen, the user PINs become visible on the screen. You can then communicate the user PIN to the respective staff member.



5. You can also click on the **Hide** link to make it hidden on screen again.

Changing a Staff Member's PIN

You as the merchant owner have the option to change your user PIN from the merchant portal.

To Change your PIN:

1. Open the merchant portal using your credentials.
2. Go to **Settings** and then click on the **Personal Profile** page.
3. You will see a User PIN field on the page. Click on the **Reset** link to change your user PIN.

The screenshot displays the 'Edit Staff User Details' page in the Chase POS Merchant Portal. The page is divided into two main sections: 'Edit User Information' and 'Edit Role & Permissions'. The 'Edit User Information' section includes fields for First Name (Sarah), Last Name (Singer), Email (sarahsinger@dreampayments.com), Mobile Phone Number (+1 (905) 555-5555), Language (English), and Status (Active). The 'Edit Role & Permissions' section shows the Role (Supervisor). At the bottom, the Security section displays the User PIN field with a 'Reset' button highlighted in a red box. The page also features a navigation sidebar on the left and a top header with the Chase logo, merchant name (Richmond Station Restaurant), and user information (Hello, John Doe!).

4. Once you click on the **Reset** link, the system will generate a new 6-digit user PIN for your account, and you will see a confirmation message on the screen.
5. You can then click on the **Show** button to view your new User PIN.

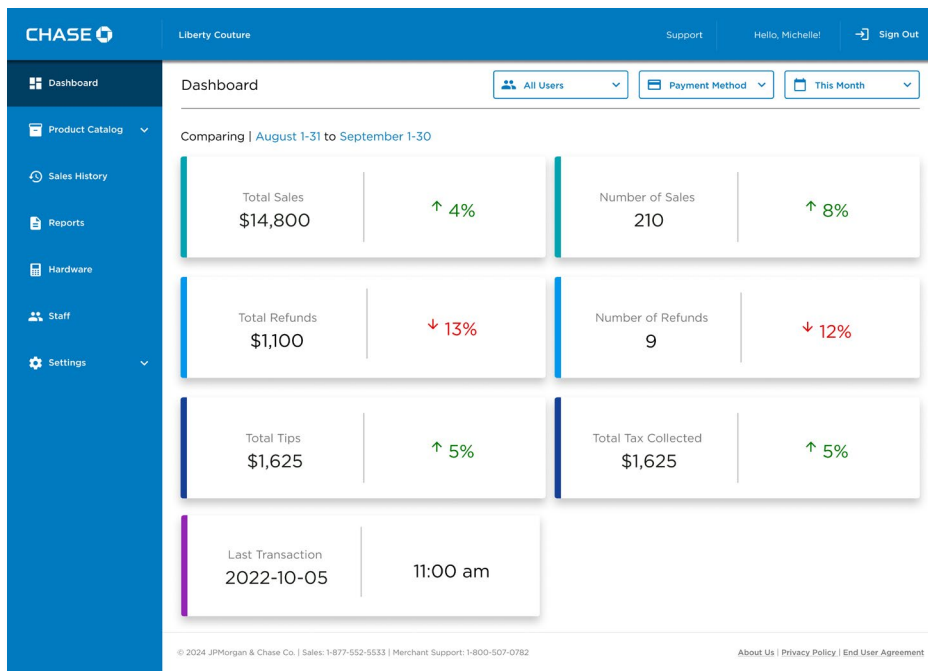
Dashboard

With Chase POS, you can review daily sales statistics performed by you or your staff via the **Dashboard**.

The Dashboard provides a real-time summary of your sales, including total sales, refunds, taxes, and tips. You may view the information by payment type, date range, or staff member that conducted the transaction.

To access the Dashboard:

1. Click on the **Dashboard** menu button.



Need to find a past transaction? You can track your historical transactions from the past 18 months.

Managing Your Product Catalogue

You can manage your commonly sold products and service within the Merchant Portal by accessing your product catalogue.

If your business has **staff users**, they will be able to access and sell products from your catalogue but will not be able to make changes to it.

When you make changes on the product catalogue you will need to log in / log out of the terminal application to retrieve the changes.

Managing Taxes

Before you create products, you'll first want to define the taxes that can be applied to your product. These tax labels will show up on your physical and digital receipts when you make a sale.

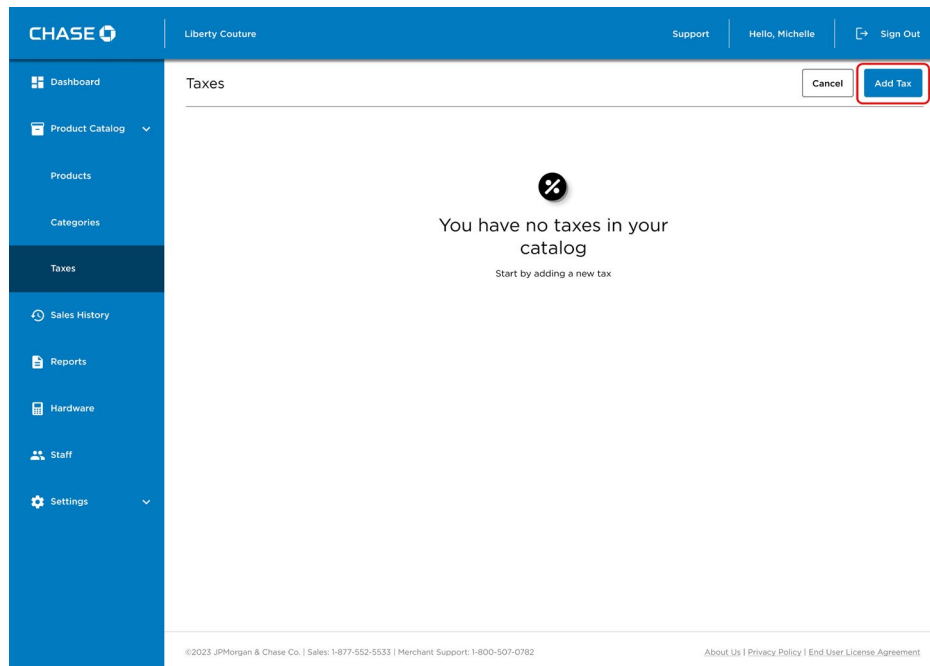
You can define up to four different taxes in the Chase POS system: GST, HST, PST, QST. You should follow CRA guidelines on the correct taxes and rates to change.

Adding a Tax

You can add taxes to your products.

To add a tax:

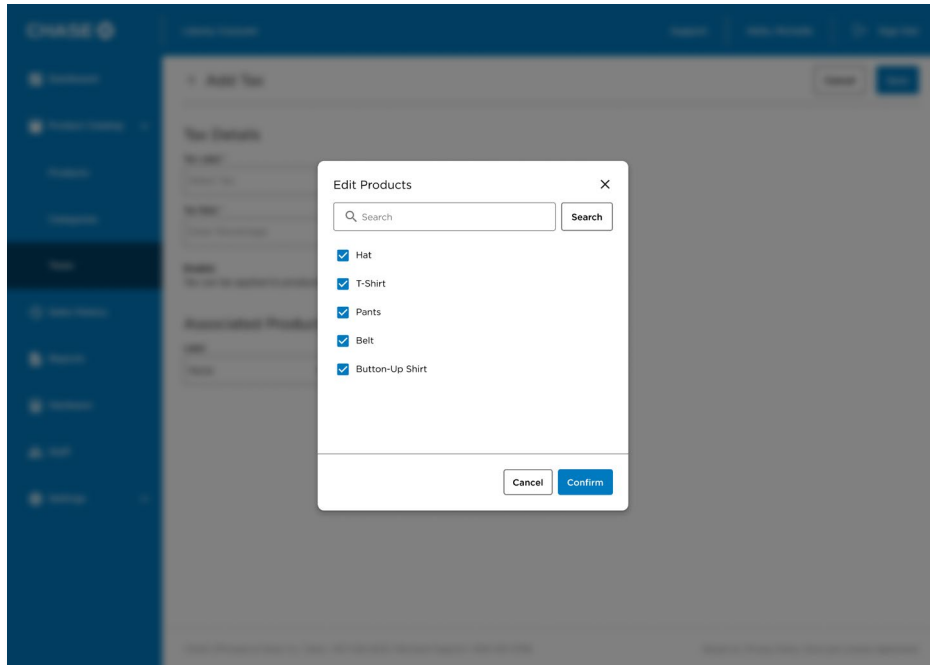
1. Go to Product Catalog → Taxes from the main menu.
2. Press the Add Tax button.



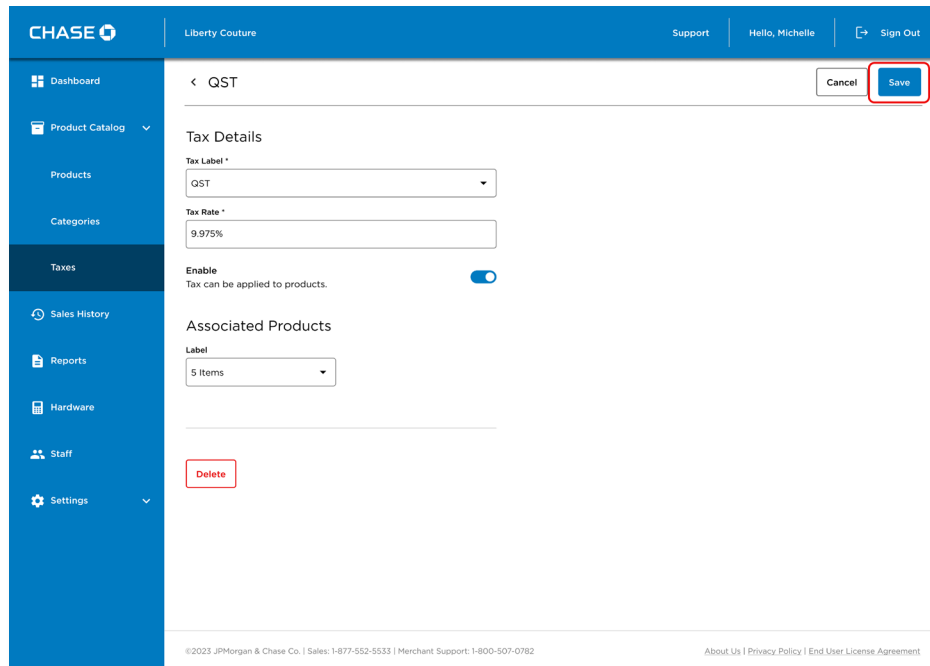
3. Select the Tax Label and enter the Tax Rate.

The screenshot displays the 'Add Tax' configuration page in the Chase POS Merchant Portal. The interface includes a blue sidebar on the left with navigation options: Dashboard, Product Catalog, Products, Categories, Taxes (highlighted), Sales History, Reports, Hardware, Staff, and Settings. The main content area has a top navigation bar with 'Support', 'Hello, Michelle', and 'Sign Out'. Below this, the page title is '< Add Tax' with 'Cancel' and 'Save' buttons. The 'Tax Details' section contains a 'Tax Label' dropdown menu (currently showing 'Select Tax') and a 'Tax Rate' input field (placeholder: 'Enter Percentage'). An 'Enable' toggle is turned on, with the text 'Tax can be applied to products.' below it. The 'Associated Products' section has a 'Label' dropdown menu (currently showing 'None'). At the bottom, there is a footer with copyright information: '©2023 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782' and a link to 'About Us | Privacy Policy | End User License Agreement'.

4. If you have products in your catalogue you can apply this tax to those items now.



5. Press Save.

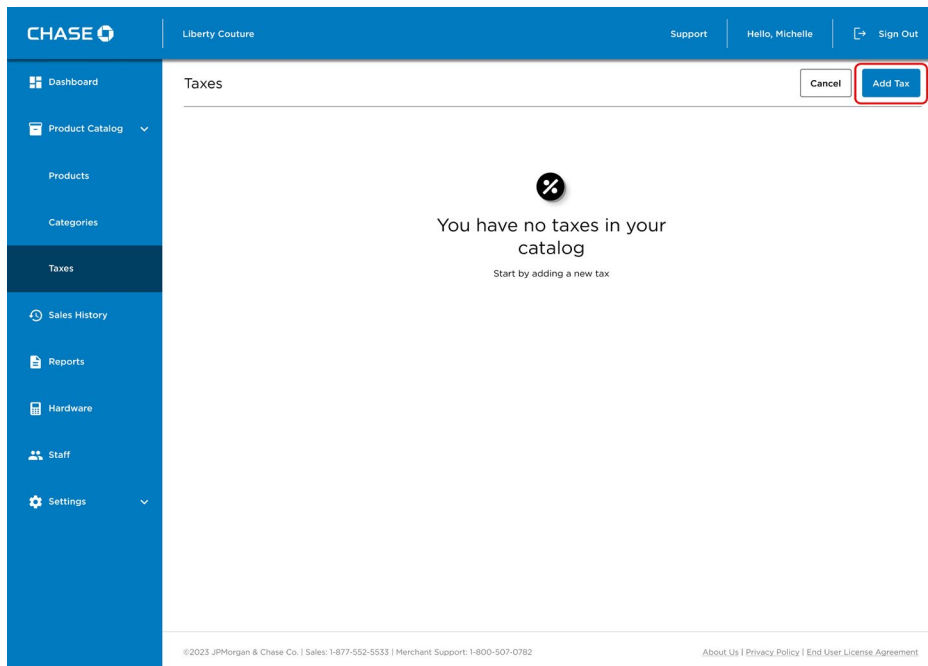


Deleting a Tax

You can delete a Tax that is no longer in use from the system. Note that this tax must be disassociated from all items before you can remove it.

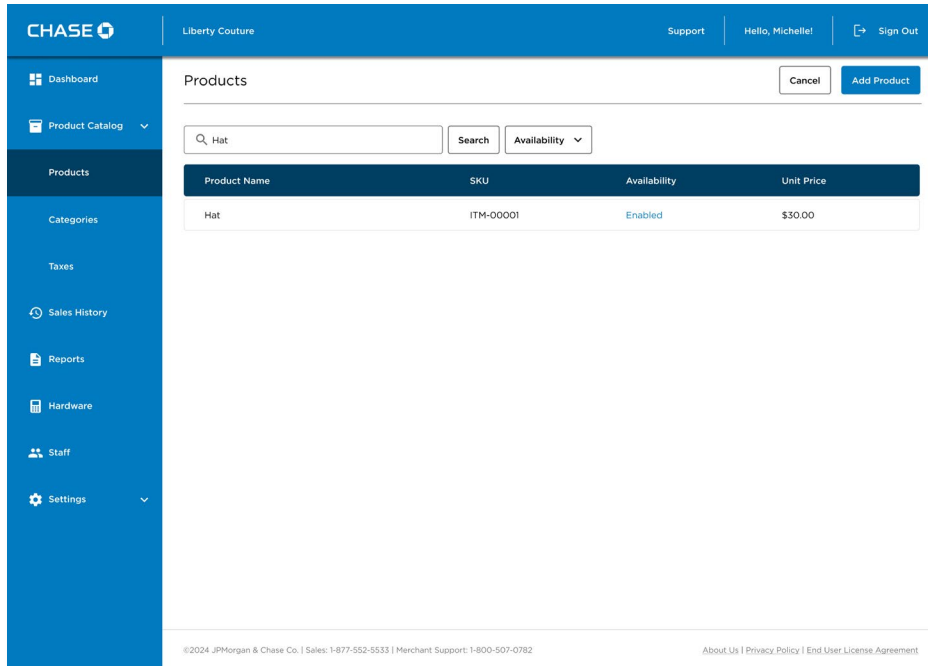
To delete a tax:

1. Go to **Product Catalogue** → **Taxes** from the main menu.
2. Select the tax you would like to delete.
3. Press Delete and confirm the deletion.



Searching the Product Catalogue

The products in the catalogue are sorted by name in alphabetical order. You can search or filter your products to find a specific product you're looking for.



The screenshot shows the Chase POS Merchant Portal interface. The top navigation bar includes the Chase logo, the merchant name "Liberty Couture", a "Support" link, the user name "Hello, Michelle!", and a "Sign Out" button. A left-hand sidebar contains navigation options: Dashboard, Product Catalog (selected), Products, Categories, Taxes, Sales History, Reports, Hardware, Staff, and Settings. The main content area is titled "Products" and features a search bar with the text "Hat", a "Search" button, and an "Availability" dropdown menu. Below the search bar is a table with the following data:

Product Name	SKU	Availability	Unit Price
Hat	ITM-00001	Enabled	\$30.00

At the bottom of the page, there is a footer with the text: "©2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782" and "About Us | Privacy Policy | End User License Agreement".

Adding a new Product

To add a new product:

1. Go to **Product Catalogue** → **Products** from the main menu.
2. Press the **Add Product** button.

The screenshot shows the 'Add Product' form in the Chase POS Merchant Portal. The interface includes a blue sidebar with navigation options: Dashboard, Product Catalog, Products, Categories, Taxes, Sales History, Reports, Hardware, Staff, and Settings. The main content area is titled 'Add Product' and contains the following sections:

- Product Details:** Includes a 'Name' field with a placeholder 'Product Name' and a 'Description' field with a placeholder 'Text'.
- Image:** A section for uploading an image, with the text 'Upload a new image from your computer.' and a dashed box containing an upload icon.
- Availability:** A toggle switch for 'Product is enabled for purchase.' which is currently turned off.
- Inventory:** A toggle switch for 'Track Quantity' which is currently turned off.
- Organization:** Includes a 'Categories' dropdown menu set to 'None' and an 'SKU Number' text input field set to 'None'.
- Pricing:** Includes a 'Unit Price' text input field set to '0.00' and a 'Taxes' dropdown menu set to 'None'.

At the top right of the form, there are 'Cancel' and 'Save' buttons. At the bottom of the page, there is a footer with copyright information: '©2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782' and a link to 'About Us | Privacy Policy | End User License Agreement'.

3. Specify the details of your product. At minimum you'll need to set a **Name** and a **Price**.

The screenshot shows the 'Add Product' interface in the Chase POS Merchant Portal. The page has a blue header with the Chase logo, the merchant name 'Liberty Couture', and user information 'Hello, Michelle!'. A left sidebar contains navigation options: Dashboard, Product Catalog, Products (selected), Categories, Taxes, Sales History, Reports, Hardware, Staff, and Settings. The main content area is titled '< Add Product' and includes a 'Cancel' button and a 'Save' button. The form is divided into several sections: 'Product Details' with fields for 'Name *' (containing 'T-Shirt') and 'Description' (containing 'Plain White Tee'); an 'Image' section with an upload prompt and a placeholder image of a white t-shirt with 'TOP DESIGN' printed on it; 'Availability' with a toggle switch for 'Product is enabled for purchase.' (turned on); 'Inventory' with a toggle switch for 'Track Quantity' (turned off); 'Organization' with dropdowns for 'Categories' (set to 'None') and 'SKU Number' (set to 'None'); and 'Pricing' with a 'Unit Price *' field (set to '0.00') and a 'Taxes' dropdown (set to 'None'). The footer contains copyright information for 2024 JPMorgan & Chase Co. and links for About Us, Privacy Policy, and End User License Agreement.

4. Once you have defined the values for your product, press **Save** to add it to your Catalogue.

Applying Sales Tax

You can add a sales tax to any product which will automatically be calculated during checkout.

To apply a Tax:

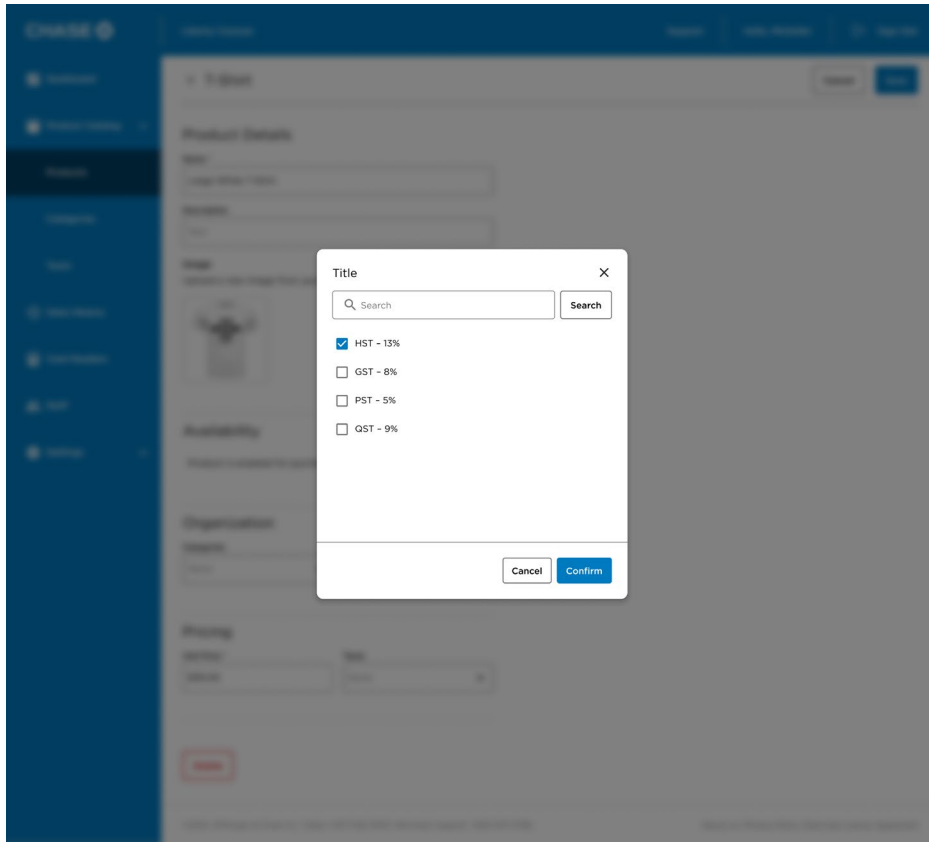
1. Go to Product **Catalogue** → **Products** from the main menu.
2. Select the product you would like to apply sales tax to.
3. Select the **Taxes** dropdown to display a list of taxes configured for your business. See [Managing Taxes](#) for information on defining taxes.

The screenshot displays the 'T-Shirt' product details page in the Chase POS Merchant Portal. The interface includes a blue sidebar with navigation options: Dashboard, Product Catalog, Products, Categories, Taxes, Sales History, Card Readers, Staff, and Settings. The main content area is titled '< T-Shirt' and contains the following sections:

- Product Details:** Includes a 'Name' field with 'T-Shirt', a 'Description' field with 'Men's White Tee', and an 'Image' section with a placeholder image of a white t-shirt and the text 'Upload a new image from your computer.'
- Availability:** A toggle switch labeled 'Product is enabled for purchase.' is currently turned on.
- Organization:** Includes a 'Categories' dropdown menu set to 'None' and an 'SKU Number' field with 'ITM-000234'.
- Pricing:** Includes a 'Unit Price' field with '\$35.00' and a 'Taxes' dropdown menu set to 'None'.

At the bottom of the page, there is a red 'Delete' button. The footer contains the text: '©2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782' and 'About Us | Privacy Policy | End User License Agreement'.

4. Select the applicable taxes, and press **Confirm** to apply it to the product.



5. Press **Save** to save your changes to the product.

CHASE Liberty Couture Support Hello, Michelle! Sign Out

Dashboard Product Catalog Products Categories Taxes Sales History Card Readers Staff Settings

< T-Shirt Cancel Save

Product Details

Name *
T-Shirt

Description
Text

Image
Upload a new image from your computer.

Availability
Product is enabled for purchase.

Organization
Categories: None SKU Number: ITM-000234

Pricing
Unit Price * \$35.00 Taxes: HST (13%)

Delete

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Assigning a Product to Categories

To help organize your catalogue, you can assign products to categories.

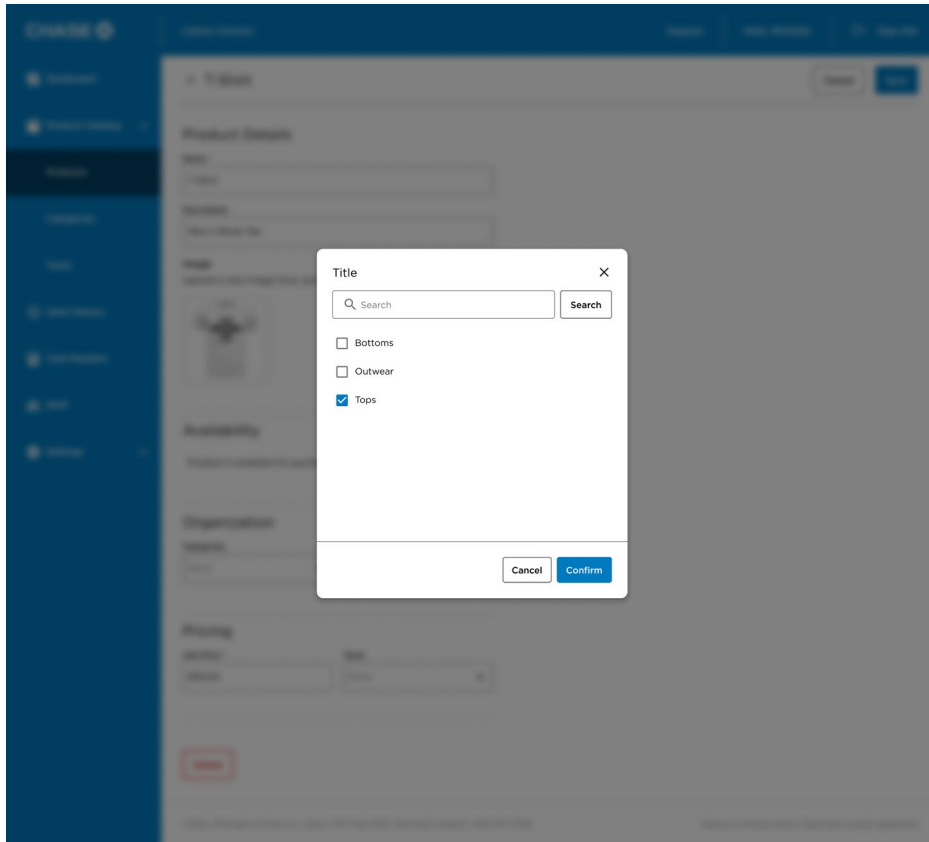
To assign a product to a category:

1. Go to **Product Catalogue** → **Products** from the main menu.
2. Select the product for which you would like to assign a category.
3. Select the **Categories** dropdown to display a list of categories configured for your merchant account. See [Managing Categories] for more information.

The screenshot displays the 'T-Shirt' product details page in the Chase POS Merchant Portal. The page is structured as follows:

- Header:** CHASE logo, Liberty Couture, Support, Hello, Michelle!, and Sign Out.
- Left Sidebar:** Dashboard, Product Catalog (expanded), Products (selected), Categories, Taxes, Sales History, Card Readers, Staff, and Settings.
- Product Details:**
 - Name:** T-Shirt
 - Description:** Men's White Tee
 - Image:** Upload a new image from your computer. (Image placeholder: YOUR DESIGN HERE)
 - Availability:** Product is enabled for purchase. (Toggle: ON)
 - Organization:**
 - Categories:** None
 - SKU Number:** ITM-000234
 - Pricing:**
 - Unit Price:** \$35.00
 - Taxes:** None
- Buttons:** Cancel, Save, and Delete.
- Footer:** ©2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782 | About Us | Privacy Policy | End User License Agreement

4. Select the applicable categories, and press **Confirm** to apply it to the product.



5. Press **Save** to save your changes to the product.

The screenshot displays the 'T-Shirt' product details page in the Chase POS Merchant Portal. The interface includes a blue sidebar with navigation options: Dashboard, Product Catalog, Products, Categories, Taxes, Sales History, Card Readers, Staff, and Settings. The main content area is titled '< T-Shirt' and features a 'Cancel' and 'Save' button in the top right. The 'Product Details' section contains the following fields:

- Name:** T-Shirt
- Description:** Text
- Image:** Upload a new image from your computer. A placeholder image of a white t-shirt with 'POP DESIGN HERE' is shown.
- Availability:** Product is enabled for purchase. (Toggle is turned on)
- Organization:**
 - Categories:** Tops
 - SKU Number:** ITM-000234
- Pricing:**
 - Unit Price:** \$35.00
 - Taxes:** None

A red 'Delete' button is located at the bottom of the form. The footer contains the text: ©2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782. About Us | Privacy Policy | End User License Agreement.

Adding an Image

You can add an image to a product which will show up in the POS application beside the product listing.

To add an image:

1. Go to **Product Catalogue** → **Products** from the main menu.
2. Select the product or service you would like to add an image to.

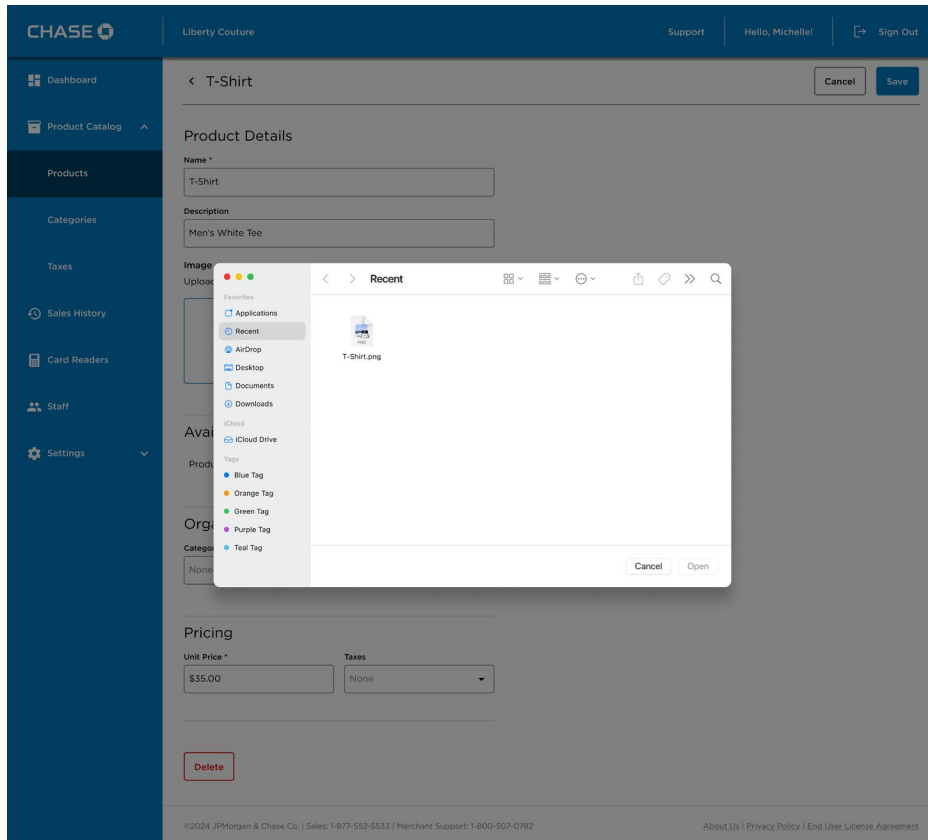
The screenshot displays the Chase POS Merchant Portal interface. The top navigation bar includes the Chase logo, the merchant name 'Liberty Couture', and user information 'Support', 'Hello, Michelle!', and 'Sign Out'. A left-hand sidebar menu contains options: Dashboard, Product Catalog (expanded), Products (selected), Categories, Taxes, Sales History, Card Readers, Staff, and Settings. The main content area is titled '< T-Shirt' and includes 'Cancel' and 'Save' buttons. The 'Product Details' section contains the following fields and controls:

- Name ***: Text input field containing 'T-Shirt'.
- Description**: Text input field containing 'Men's White Tee'.
- Image**: Section with the instruction 'Upload a new image from your computer.' and a square placeholder box with an upload icon.
- Availability**: Section with the text 'Product is enabled for purchase.' and a toggle switch that is currently turned on.
- Organization**: Section with two dropdown menus: 'Categories' (set to 'None') and 'SKU Number' (set to 'ITM-000234').
- Pricing**: Section with two dropdown menus: 'Unit Price *' (set to '\$35.00') and 'Taxes' (set to 'None').

At the bottom left of the form area is a red 'Delete' button. The footer contains copyright information: '©2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782' and links for 'About Us | Privacy Policy | End User License Agreement'.

3. Press the upload image icon and browse the files on your computer and select an image you'd like to use.

Note: This dialog box will vary depending on your web browser and operating system.



4. Press **Save** to save your changes to the product.

The screenshot displays the 'T-Shirt' product details page in the Chase POS Merchant Portal. The interface includes a blue sidebar with navigation options: Dashboard, Product Catalog, Products, Categories, Taxes, Sales History, Card Readers, Staff, and Settings. The main content area is titled '< T-Shirt' and features a 'Cancel' and 'Save' button in the top right. The 'Product Details' section contains the following fields:

- Name:** T-Shirt
- Description:** Men's White Tee
- Image:** A placeholder image of a white t-shirt with the text 'YOUR DESIGN HERE'.
- Availability:** A toggle switch labeled 'Product is enabled for purchase.' which is currently turned on.
- Organization:** Includes a 'Categories' dropdown menu set to 'None' and an 'SKU Number' field containing 'ITM-000234'.
- Pricing:** Includes a 'Unit Price' field set to '\$35.00' and a 'Taxes' dropdown menu set to 'None'.

A red 'Delete' button is located at the bottom of the form. At the bottom of the page, there is a footer with the text: '©2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782' and 'About Us | Privacy Policy | End User License Agreement'.

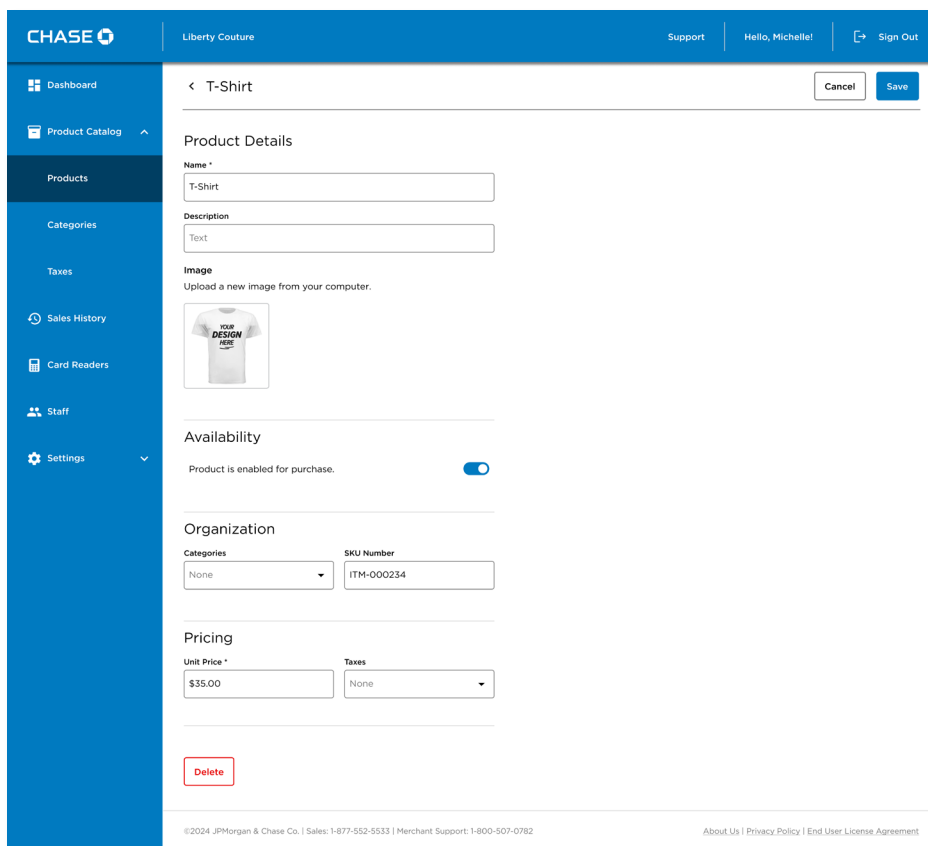
Note: A **Remove Image** icon will be displayed if an existing image is present, press that icon to remove the image from your product.

Enabling or Disabling a Product

You may wish to **disable** a product if it is not currently available for sale. Disabling a product will hide it from the list when performing a catalogue sale, but not delete it from your product catalogue.

To Disable a Product:

1. Go to **Product Catalogue** → **Products** from the main menu.
2. Select the product or service you would like to disable.



The screenshot displays the 'T-Shirt' product details page in the Chase POS Merchant Portal. The interface includes a blue sidebar with navigation options: Dashboard, Product Catalog, Products, Categories, Taxes, Sales History, Card Readers, Staff, and Settings. The main content area shows the product details for 'T-Shirt'. The 'Name' field contains 'T-Shirt'. The 'Description' field is empty. The 'Image' section shows a placeholder image of a white t-shirt with 'POP DESIGN HERE' printed on it. The 'Availability' section has a toggle switch that is currently turned on, indicating the product is enabled for purchase. The 'Organization' section includes a 'Categories' dropdown menu set to 'None' and an 'SKU Number' field containing 'ITM-000234'. The 'Pricing' section shows a 'Unit Price' of '\$35.00' and a 'Taxes' dropdown menu set to 'None'. A red 'Delete' button is located at the bottom left of the product details form. The top navigation bar includes the Chase logo, the user's name 'Liberty Couture', 'Support', 'Hello, Michelle!', and a 'Sign Out' link. The footer contains copyright information for 2024 JPMorgan & Chase Co. and links to 'About Us', 'Privacy Policy', and 'End User License Agreement'.

3. Press the **Availability** toggle to disable to the product.

The screenshot shows the Chase POS Merchant Portal interface for editing a product named 'T-Shirt'. The page is titled 'Product Details' and includes a navigation sidebar on the left with options like Dashboard, Product Catalog, Products, Categories, Taxes, Sales History, Card Readers, Staff, and Settings. The main content area has several sections: 'Name' (T-Shirt), 'Description' (Text), 'Image' (with a placeholder image of a t-shirt), 'Availability' (with a toggle switch currently turned on), 'Organization' (with 'Categories' set to 'None' and 'SKU Number' as 'ITM-000234'), and 'Pricing' (with 'Unit Price' at '\$35.00' and 'Taxes' set to 'None'). There are 'Cancel' and 'Save' buttons at the top right, and a 'Delete' button at the bottom left. The footer contains copyright information for 2024 JPMorgan & Chase Co. and links to About Us, Privacy Policy, and End User License Agreement.

4. Press **Save** to save your changes to the product.

Tracking Inventory

Chase POS offers a simple inventory tracking system that can be enabled on a per-product basis. Once enabled, you can set your initial inventory levels and the system will automatically decrease inventory levels when sale transactions are made and restore inventory levels when sales are refunded or voided.

Inventory levels can be set to:

- Zero (0): Indicating that the item is out of stock.
- Positive (up to 999,999): Indicating the stock on hand.
- Negative (down to -999,999): Indicating oversold stock, inventory undercounting, or refunds that included damaged goods.

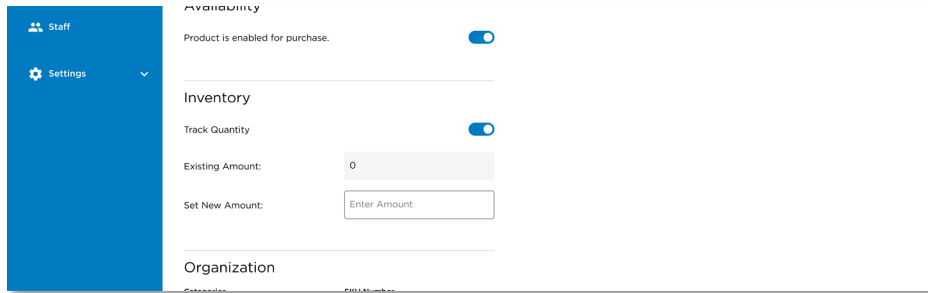
Enabling Inventory

To Enable Inventory on a Product:

1. Go to **Product Catalogue** → **Products** from the main menu.
2. Select the product that whose inventory you'd like to track.



3. Press the **Track Inventory** toggle to enabled inventory tracking.



4. The default inventory level is 0. Enter a value in the **New Amount** field to change the initial level.

5. Press **Save** to save your changes to the product.

Inventory Adjustments

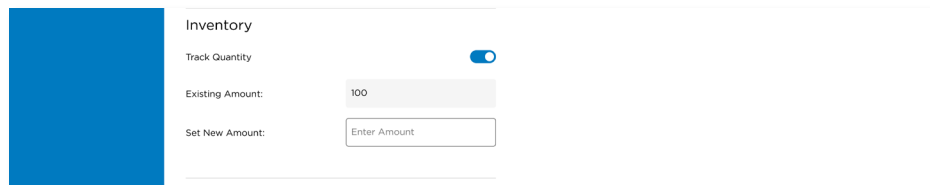
Inventory levels will be incremented automatically when sale transactions are approved and decremented when orders are refunded or voided. Chase POS will assume that all refunded or voided items have been returned to inventory.

Note: Chase POS will not prevent you from making sales that include products that have zero stock. Instead, the stock levels will go into the negative.

If items have been damaged and shouldn't be returned to inventory, you can manually adjust the inventory amounts after the transaction is completed.

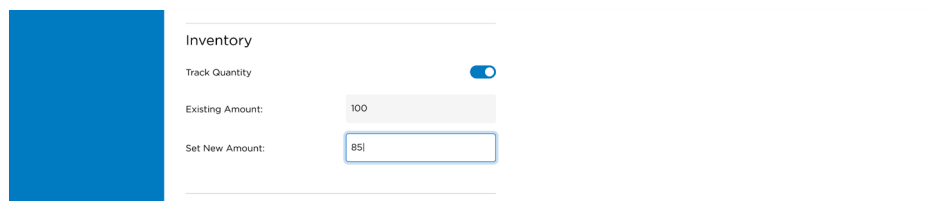
To Manually Adjust Inventory Levels for a Product:

1. Go to **Product Catalogue** → **Products** from the main menu.
2. Select the product that whose inventory you'd like to adjust.



The screenshot shows the 'Inventory' settings for a product. On the left is a blue sidebar. The main content area has the title 'Inventory'. Below it is a 'Track Quantity' toggle switch, which is currently turned on. Underneath is the 'Existing Amount' field, which contains the number '100'. At the bottom is the 'Set New Amount' field, which is empty and has the placeholder text 'Enter Amount'.

3. Enter a value in the **New Amount** field to change the initial level.



This screenshot is identical to the previous one, but the 'Set New Amount' field now contains the number '85', indicating that the user has entered a new inventory level.

4. Press **Save** to save your changes to the product.

Reviewing Inventory Levels

To review your inventory levels, you can run the Product Inventory Report from the reports section of the Merchant Portal. See the [Product Inventory Report](#).

Deleting a Product

You can delete a product to remove it from the catalogue.

To delete a product:

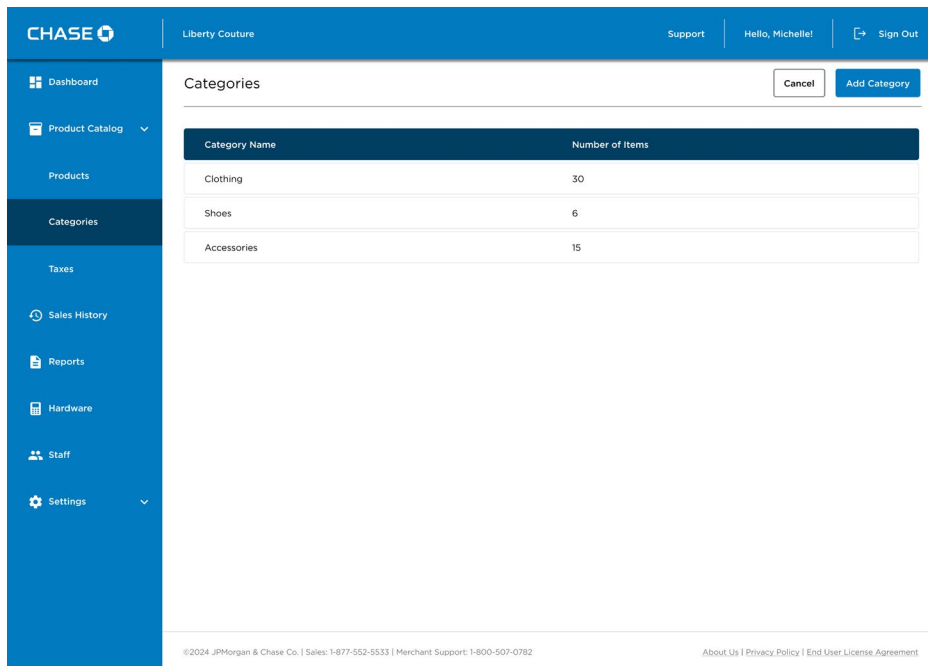
1. Go to **Product Catalogue** → **Products** from the main menu.
2. Select the product or service you would like to delete.
3. Press the Delete button.
4. Confirm that you wish to delete this product by pressing **Delete** on the confirmation dialogue.

Managing Categories

Categories allow you to organize your catalogue more efficiently. You can manage your categories from the Categories page.

To search your categories:

1. Go to **Product Catalogue** from the menu button.
2. Press **Categories** tab to display a list of existing categories and the option to manage categories.

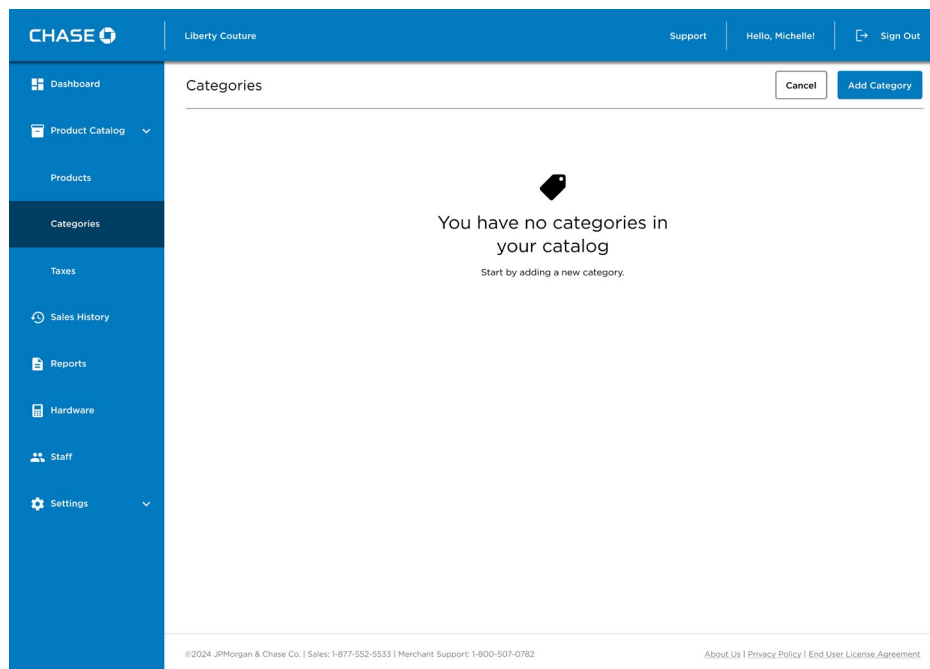


Adding a Category

You can add a new category to help group and organize your products.

To add a category:

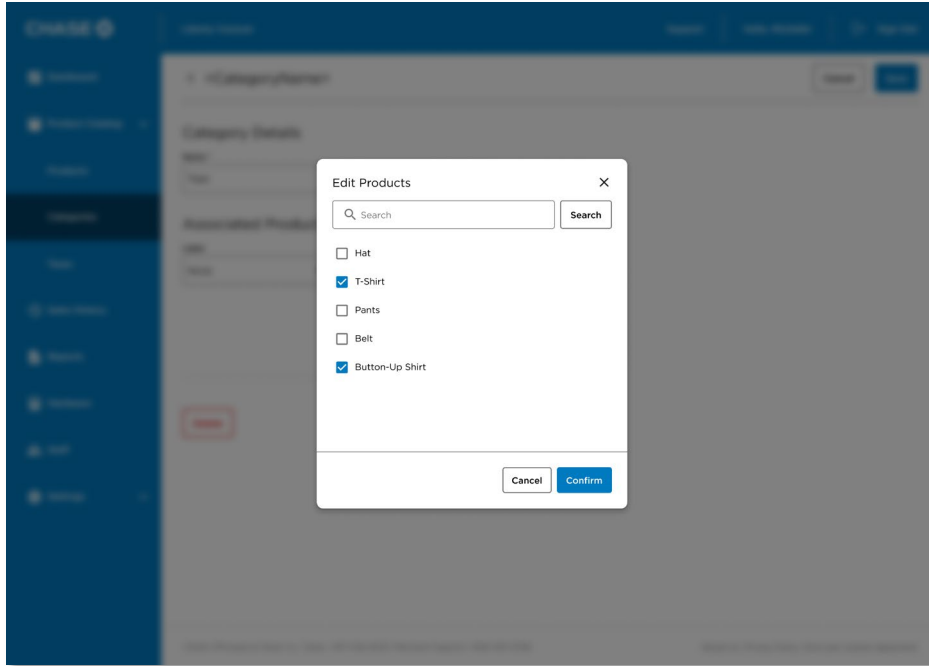
1. Go to **Product Catalogue** → **Products** from the main menu.
2. Press **Add Category**.



3. Enter a Category Name.

The screenshot displays the 'Add Category' interface in the Chase POS Merchant Portal. The top navigation bar includes the Chase logo, the merchant name 'Liberty Couture', and user options like 'Support', 'Hello, Michelle!', and 'Sign Out'. The left sidebar lists various management tools: Dashboard, Product Catalog, Products, Categories (highlighted), Taxes, Sales History, Reports, Hardware, Staff, and Settings. The main content area is titled '< Add Category' and features a 'Category Details' section with a 'Name' input field containing the text 'Clothing'. Below this is an 'Associated Products' section with a 'Products' dropdown menu currently set to 'None'. 'Cancel' and 'Save' buttons are located in the top right corner of the form area. At the bottom of the page, there is a footer with copyright information: '©2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782' and a link to 'About Us | Privacy Policy | End User License Agreement'.

4. Press the **Associated product(s)** dropdown to bring up a list of products in your catalogue you'd like to add to this category. Press **Confirm** when finished.



5. Press **Save** to save your new category.

Editing a Category

You can edit a category you have previously set up including the category name and products for which the category applies.

To edit a category:

1. Go to **Product Catalogue** → **Categories** from the main menu.
2. Select the category from the list and make any changes.
3. When you're finished press **Save** to save changes.

Deleting a Category

Deleting a category is similar to deleting products.

To delete a category:

1. Go to **Product Catalogue** → **Categories** from the main menu.
2. Press the **Delete** button.
3. Confirm that you wish to delete the category by pressing **Delete** again.

Sales History

The Sales History presents a transaction list that allows you to view your You may select any transaction to see more details and resend a receipt.

Date	Time	Order Number	Details	Payment Type	Total	Status
02/20/2020	01:51 PM	0000004695	Product/Sale	Credit	\$77.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Cash	\$199.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Credit	\$77.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Credit	\$199.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Cash	\$77.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Credit	\$199.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Debit	\$77.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Cash	\$25,000.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Credit	\$77.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Credit	\$199.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Credit	\$77.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Debit	\$5,000.00	Approved
02/20/2020	01:51 PM	0000004695	Product/Sale	Credit	\$77.00	Approved

Filters

The transactions can be filtered by the following criteria:

- User: All Users, or by a particular user.
- Payment Type: Any of Cash, Credit, or Debit.
- Date Range: Any date range up to 18 months.

Fields

The following fields are displayed in the sales history table.

FIELD	DESCRIPTION
Date	Date of the transaction
Time	Time of the transaction
Order Number	Unique order number of the sale, printed on the receipt
Details	List of products sold
Payment Type	Method of payment: Cash, Credit, Debit
Total	Total value of the transaction including taxes and tips. Voids and refunds are displayed in red as a negative amount.
Status	Indicates whether the payment has been approved, declined, or is still in-progress.

Transaction Details

Clicking on a transaction will display the **Transaction Details Screen**. Here you'll be able to see the order number, the user who placed it, when it was placed, the approval status, the credit card number, any refunds or voids that have been applied to it, as well as an itemized list of the order.

CHASE Liberty Couture Support Hello, Peter Cinelli! Sign Out

Transaction Details Previous Next

Order Number: 000004695

Performed by: John Doe

Device: Ingenico DX8000

TID: 001

Date: 03/19/2020

Time: 12:17 PM

Approved Total: \$44.94

Credit Card Number: ●●●●●●●● 0119
Auth Number: 043459
Contactless

Refund Order Number: 000004695 View Order

View Receipt Send Receipt

4 Items

Dream Adapter	\$30.00
\$15.00 x 2	
Dream Charger	\$8.00
\$8.00 x 1	
Dream Wall Charger	\$10.00
\$10.00 x 1	
Subtotal	\$48.00
5% GST	\$2.40
7% PST	\$3.36
Tip	\$2.00
Total	\$55.76

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Resending a Receipt

Occasionally, a customer may request that you send them a receipt from a past transaction. You can find the customer's receipt from the **Sales History** screen.

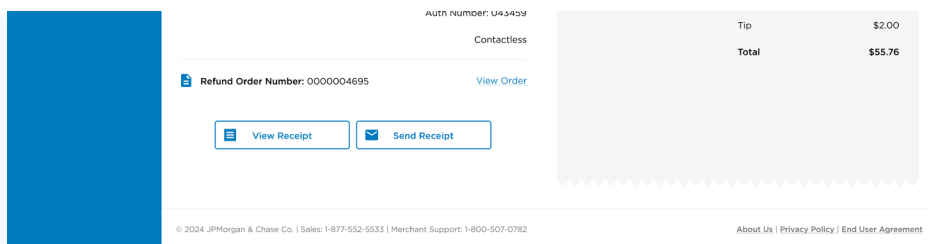
You can resend the PDF receipt to a customer's email address or mobile number.

When sending over email the PDF will be send as an attachment.

When sending over text message, a secure link is provided to download the PDF.

To resend a receipt:

1. Click on the **Sales History** menu button.
2. Select your desired transaction.
3. Press the **Send Receipt** button.
4. Enter the customer's email address or mobile number and click the **Send** button.

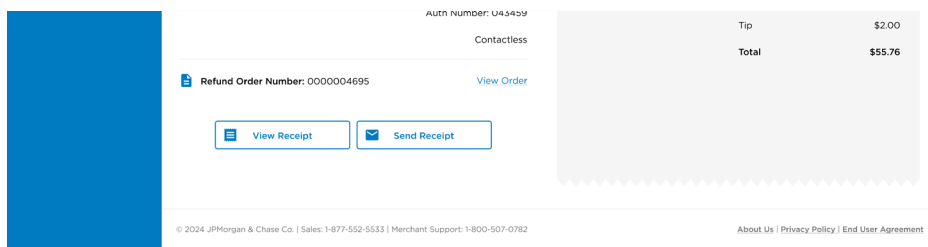


Downloading a Receipt

If you wish to save a copy of a transaction receipt, you can download a PDF copy on the **Sales Details** screen.

To download a receipt:

1. Click on the **Sales History** menu button.
2. Browse for the particular transaction you would like to download a receipt for.
3. Click on the **ORDER #** of the transaction to view the details.
4. Click on **View Receipt**



Receipt language



The receipt is downloaded in the same language you set for the Merchant Portal (English or French). See [Changing Your Language](#).

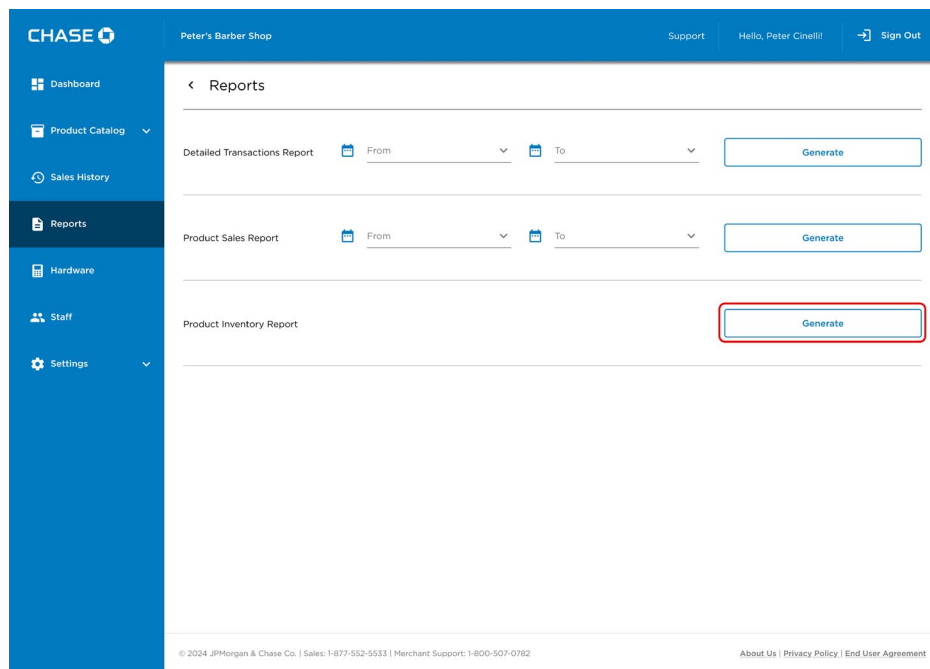
Viewing Reports

You can download detailed analytics and reports for your business. These reports will allow you to accurately track your transactions, as well as products and services your business has sold.

The reporting feature provides real-time reporting and analytics to track and analyze your sales.

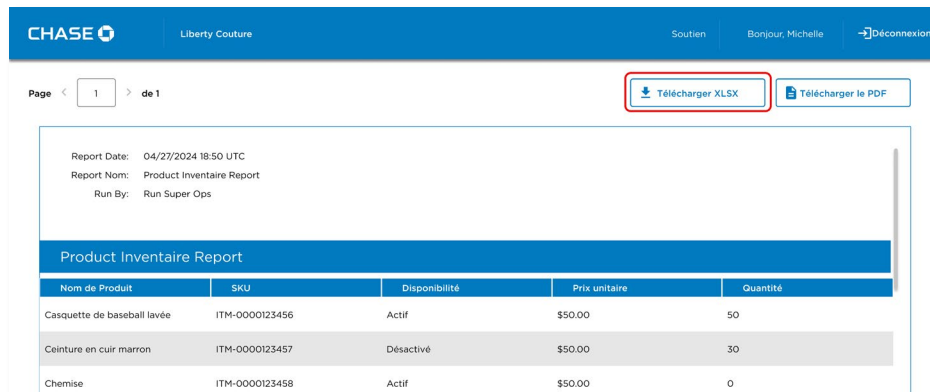
To run a report:

1. Click on the **Reports** menu button.
2. If the report supports a time period, enter the **From** and **To** dates.
3. Press the **Generate** button.



To export a report:

1. Click on the **Reports** menu button.
2. If the report supports a time period, enter the **From** and **To** dates.
3. Click on the **Generate** button.
4. Click on the **Download PDF** or **Download CSV** button.



Detailed Transactions Report

The Detailed Transactions Report provides a list of sales for a given time-period. The report includes details of each transaction such as payment method, geolocation, taxes, tips and receipt delivery.

Product Catalogue Sales Report

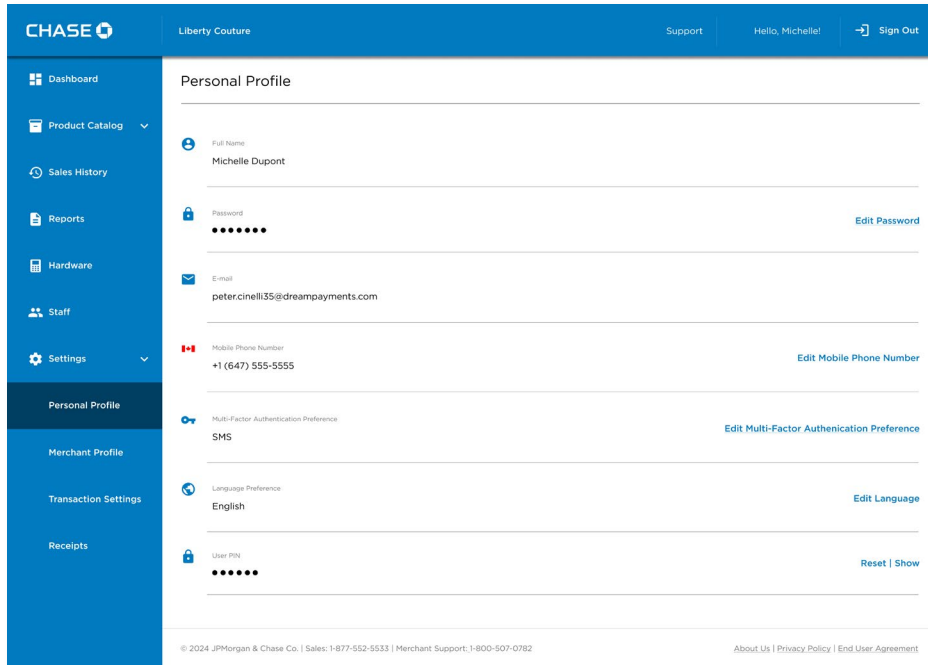
The Product Catalogue Sales Report provides sales volume grouped by product for a given time-period.

Product Inventory Report

The Product Inventory Report provides a listing of the current inventory levels for all products that have inventory tracking enabled.

Updating Your Personal Profile

Your personal profile can be located under **Settings** → **Personal Profile**.



Changing Your Name

To change the name associated to your account, please call merchant support at 1-800-507-0782.

Changing Your Language

The Merchant Portal can be viewed in either English or French.

To change your language:

1. Go to the **Settings** menu and select Personal Profile. In the bottom right corner of the page click on **Edit Language**.

2. Select your language preference and click **Save**.

Changing Your Mobile Number

Your mobile number can be used for two-factor authentication when signing in.

To change your mobile number:

1. Click on **Settings** > **Personal Profile** menu button.
2. Click on **Edit Mobile Phone Number**.
3. Enter your new **Mobile Phone Number** and click **Save**.

Changing Your Password

Your password is required to sign in to the Merchant Portal or Chase POS terminal.

To change your password:

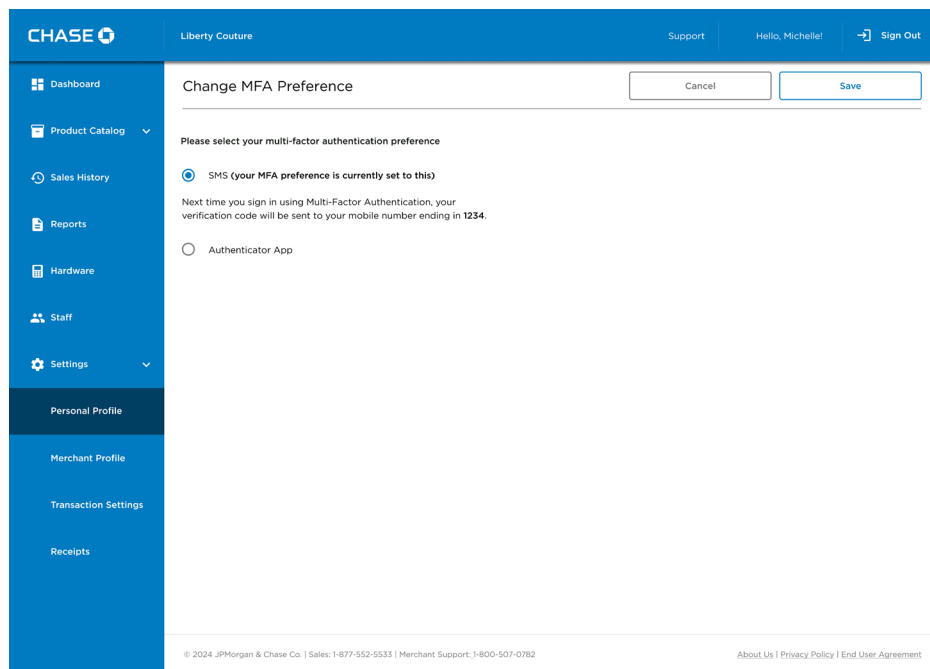
1. Click on **Settings** > **Personal Profile** from the main menu.
2. Click on **Edit Password** button.
2. Enter your **Current Password** and **New Password** and click the **Save** button.

Changing Your Verification Preference

Your MFA Preference set up when you first signed in, is used as an additional security check to confirm your identity.

To change your Verification Preference:

1. Go to **Settings** > **Personal Profile** from the main menu.
2. Click on **Edit Multi-Factor Authentication Preference**.
3. Choose the new Verification Preference (either **SMS** or **Authenticator App**)



4. Follow the steps and press **Save**.

Updating Your Merchant Profile

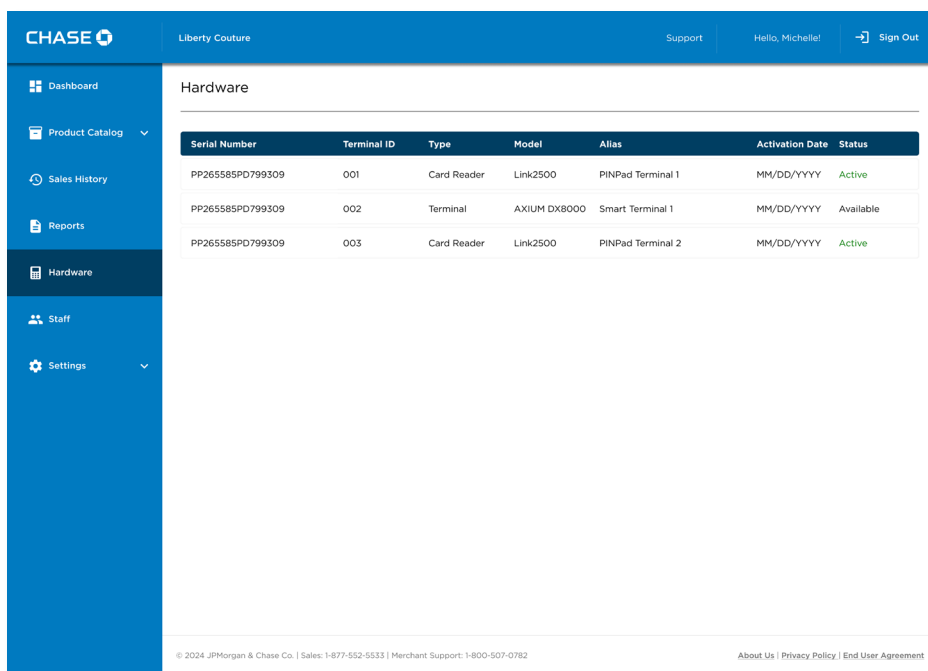
To change the name or address associated to your merchant profile, please call merchant support at 1-800-507-0782.

Viewing Your Terminals

The Hardware Screen lists the Chase POS terminals that are associated to your merchant account, including information such as, name, serial number and status.

To view your terminals:

1. Click on **Hardware** main menu button.



The screenshot shows the Chase POS Merchant Portal interface. The top navigation bar includes the Chase logo, the merchant name 'Liberty Couture', a 'Support' link, the user name 'Hello, Michelle!', and a 'Sign Out' button. The left sidebar contains menu items: Dashboard, Product Catalog, Sales History, Reports, Hardware (highlighted), Staff, and Settings. The main content area is titled 'Hardware' and displays a table with the following data:

Serial Number	Terminal ID	Type	Model	Alias	Activation Date	Status
PP26558SPD799309	001	Card Reader	Link2500	PINPad Terminal 1	MM/DD/YYYY	Active
PP26558SPD799309	002	Terminal	AXIUM DX8000	Smart Terminal 1	MM/DD/YYYY	Available
PP26558SPD799309	003	Card Reader	Link2500	PINPad Terminal 2	MM/DD/YYYY	Active

At the bottom of the page, there is a footer with the text: '© 2024 JPMorgan & Chase Co. | Sales: 1-877-552-5533 | Merchant Support: 1-800-507-0782' and 'About Us | Privacy Policy | End User Agreement'.

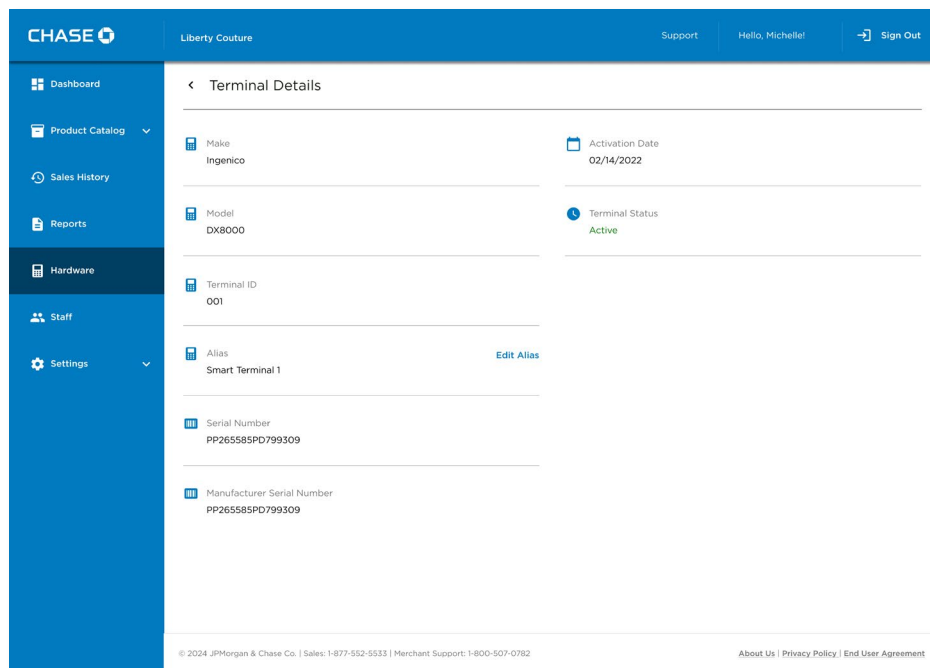
Here, you will see a list of terminals associated with your account.

Updating a Terminal's Name

You can assign a user-friendly name, called an Alias to each terminal for easier identification.

To update a Terminal's name:

1. Click on **Hardware** menu button.
2. Click on the terminal you would like to change.
3. Click on **Edit Alias**.
4. Enter the new **Alias** and click the **Save** button.



Replacing a Terminal

To replace a terminal call Merchant Support at 1-800-265-5158 so they can remove the terminal from your account.

Configuring Transaction Settings

To request a change to transaction settings such as tip amounts, transaction limits, manual card entry configuration, and supported payment cards please contact Merchant Support at 1-800-265-5158.

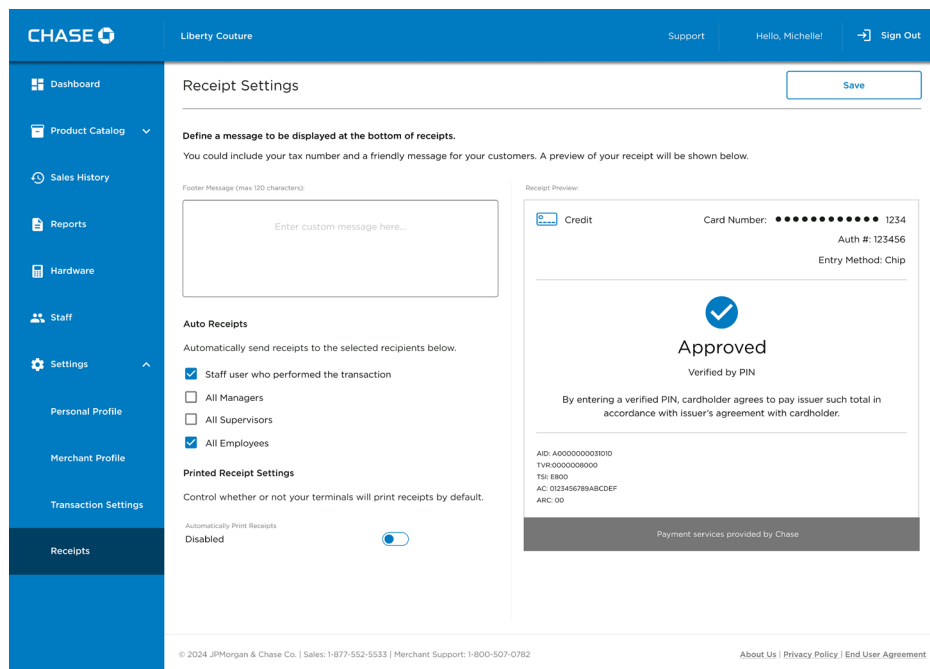
Receipt Settings

The receipts can be sent manually:

- right after the transaction is processed in the mobile app OR
- by accessing the Sale History in the mobile app at a later point in time OR
- by accessing the Sale History in the merchant portal at a later point in time

or automatically:

- by setting the appropriate preference in the Receipt Settings.



Automatic Receipts

The [Receipt Settings](#) page allows you to enable automatic sending of receipts. You can do so by selecting any combination of the four options provided:

- Performed by (whoever is performing the particular transaction)

- Manager
- All Supervisors
- All Employees

You can choose one option, two, three, or all four options. If you choose for example “Manager” and “All Supervisors” then after every transaction processed, a receipt will be sent automatically to the manager and to all supervisors.

If no option is selected, receipts will not be sent out automatically. This is also the default state.

Make sure you save your changes by clicking the Save button at the end.

Custom Receipt Message

On the [Receipt Settings](#) page you may also add a custom message that will be displayed in the bottom half of your receipts. This is a great place to include a message for your customers.

After you type your custom message, a preview of the receipt with your custom message is displayed on the right side of the [Receipt Settings](#) page.

Make sure you save your changes by clicking the Save button at the end.

¹ Chase POS is available to Canadian Merchants accepting transactions within Canada only. In addition, all applicable processing fees outlined in the merchant services contract with Chase® Merchant Services will be assessed for all transactions initiated through the app.

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² All merchants are required to complete a more detailed application, and agree to terms and conditions, at the time of enrollment. All merchants are subject to credit approval.