



Merchant Portal Guide

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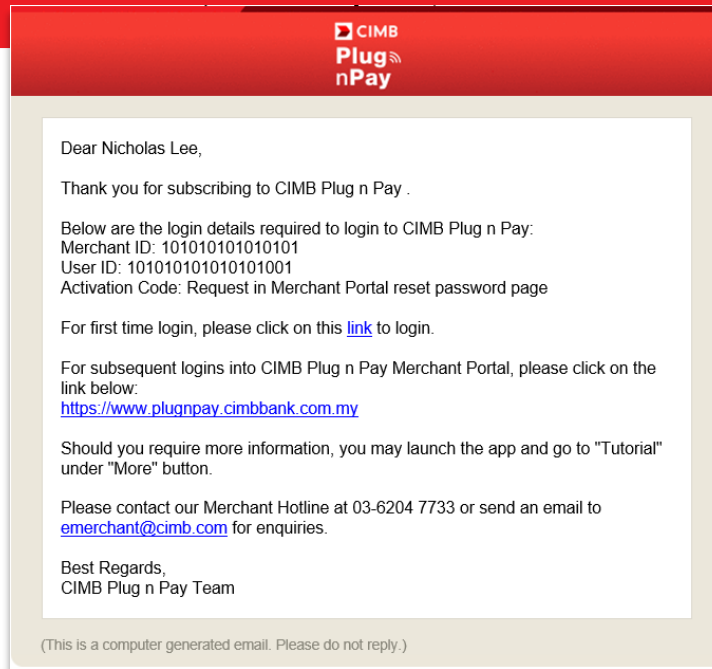
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ACCOUNT ACTIVATION

Step 1:

Click on the activation link received through email from CIMB Plug N Pay or CIMB Tap N Pay to activate your account.



ACCOUNT ACTIVATION

Step 2:

At the reset password page key in your preferred new password twice and click 'Request Activation Code'.

CIMB Plug nPay CIMB Tap nPay

Reset Password

Merchant ID (MID) 1010101010101

New Password

Retype Password

Activation Code

[Request Activation Code](#)

Submit

Note: New Password must contain 7 alphanumeric characters with at least one upper case

Step 3:

Enter the 6-digit activation code received via SMS to the user's mobile number and click 'Submit'.

1:54 62004

iMessage Today 1:51 PM

RM0. CIMB: mPOS
Your activation code is **039392** for the MID:
101010101010101
User ID:1010101010101001
Activation code is valid until
6/5/2021
11:11:11

CIMB Plug nPay CIMB Tap nPay

Reset Password

Merchant ID (MID) 1010101010101

New Password

Retype Password

Activation Code

[Request Activation Code](#)

Submit

ACCOUNT ACTIVATION

Step 4:

Login with your User ID as shown in the email from CIMB Plug N Pay or CIMB Tap N Pay and enter your new User Password.

CIMB Plug N Pay CIMB Tap N Pay

Login

User ID 1010101010101001

Password

Submit

Forgot Password

Step 5:

Upon successful login, you will be directed to the merchant portal home page.

Good Day, 1010101010101001
Wednesday, 05 May 2021, 14:19:03
Your last log in was Wednesday, 05 May 2021, 14:01

LOGOUT

Home Manage Mobile Users Readers Transactions Credit Settlements Settings Administrator

Daily Transaction Snapshot

As of Wednesday 05 May 2021, 14:19

Total Amount (RM)
0.00

View Details

Settled Unsettled Voided

Manage Mobile Users

Search and view mobile user details, and monitor their transactions.

- Mobile User Summary
- Add a Mobile User

Readers

View readers.

- Reader Summary
- Tap N Pay Summary

Transactions

View daily transaction details.

- Transaction Summary
- Recurring Payment Plan
- Recurring Transaction Summary
- Recurring Payment Bulk Upload

Credit Settlements

View daily credit settlements.

- Credit Settlement Summary
- Schedule Force Settlement

Settings

Change password and Mobile App Home Photo.

- Change Password
- Change Mobile App Home Screen Photo

Administrator

Grant access rights, and new web users and audit trail.

- Manage Web Users
- Add a Web User
- Audit Trail
- Show Tutorial

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Supported browsers: Google Chrome [Ver. 38+], Mozilla Firefox [Ver. 33+], Internet Explorer [Ver. 8+], Safari [Ver. 6+]

DOWNLOAD SETTLEMENT REPORTS

Step 1:

From the home page, click on 'Credit Settlement Summary' quick link.

The screenshot shows a dashboard with six main sections: Manage Mobile Users, Readers, Transactions, Credit Settlements, Settings, and Administrator. In the 'Credit Settlements' section, the 'Credit Settlement Summary' link is highlighted with a red box and a hand cursor pointing to it.

- Manage Mobile Users**
 - Search and view mobile user details, and monitor their transactions.
 - Mobile User Summary
 - Add a Mobile User
- Readers**
 - View readers.
 - Reader Summary
 - Tap n Pay Summary
- Transactions**
 - View daily transaction details.
 - Transaction Summary
 - Recurring Payment Plan
 - Recurring Transaction Summary
 - Recurring Payment Bulk Upload
- Credit Settlements**
 - View daily credit settlements.
 - Credit Settlement Summary
 - Schedule Force Settlements
- Settings**
 - Change password and Mobile App Home Photo.
 - Change Password
 - Change Mobile App Home Screen Photo
- Administrator**
 - Grant access rights, and new web users and audit trail.
 - Manage Web Users
 - Add a Web User
 - Audit Trail
 - Show Tutorial

Step 2:

Search for a successfully settled batch from the search options provided or by scrolling the list of settled batches and click on 'View Details'.

The screenshot shows the 'Force Settlements' interface. At the top, it says 'Current Schedule: Daily at 11:00 PM'. Below this is a search bar for 'Batch No.' with a 'Search' button. Underneath is a section for 'All Credit Settlements' with filters for Terminal ID (TID), Mobile User ID, Status (a dropdown menu), and Date (from 01 May 2018 to 01 Aug 2018). A 'Search' button is located below these filters. Below the search filters, it indicates 'Total Records: 40' and 'Page 1 of 3'. A table displays the search results with columns for Date/Time, Status, Batch No., Mobile User ID, TID, and Quicklink. Two rows are visible, both with a 'View Details' button.

Date/Time	Status	Batch No.	Mobile User ID	TID	Quicklink
23 07 2018 / 12:43:54 PM	Successful	000007	mu2	18052302	View Details
23 07 2018 / 11:07:33 AM	Successful	000013	mu2	18061101	View Details

DOWNLOADING SETTLEMENT REPORTS

Step 3:

Click on 'Download Settlement Report' to download the report in PDF format or click on 'Export to CSV' to download in CSV format.

The credit settlement for this batch was successful [Download Settlement Report](#)

Visa	RM 0.00
MasterCard	RM 0.00
MyDebit	RM 5.00
UPI	RM 0.00
DuitNow	RM 0.00
QR	RM 0.00
Total Amount	RM 5.00

Batch Details

Terminal ID (TID)

Approval Code

Status

Amount

Date to

[Search](#)

Total Records: 1 Page 1 of 1

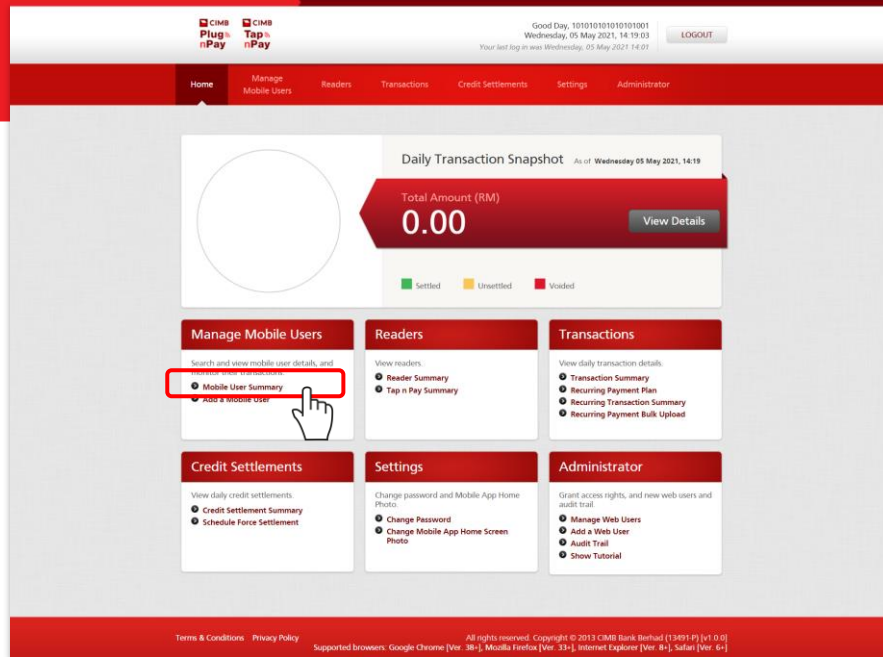
Date/Time	Transaction ID	TID	Approval Code	Status	Amount	Quicklink
2021-05-04 16:39:33.057	00933818040521000244	00933818	248268	Settled	5.00	View Details

[Export to CSV](#)

PIN RESET FOR MOBILE USERS

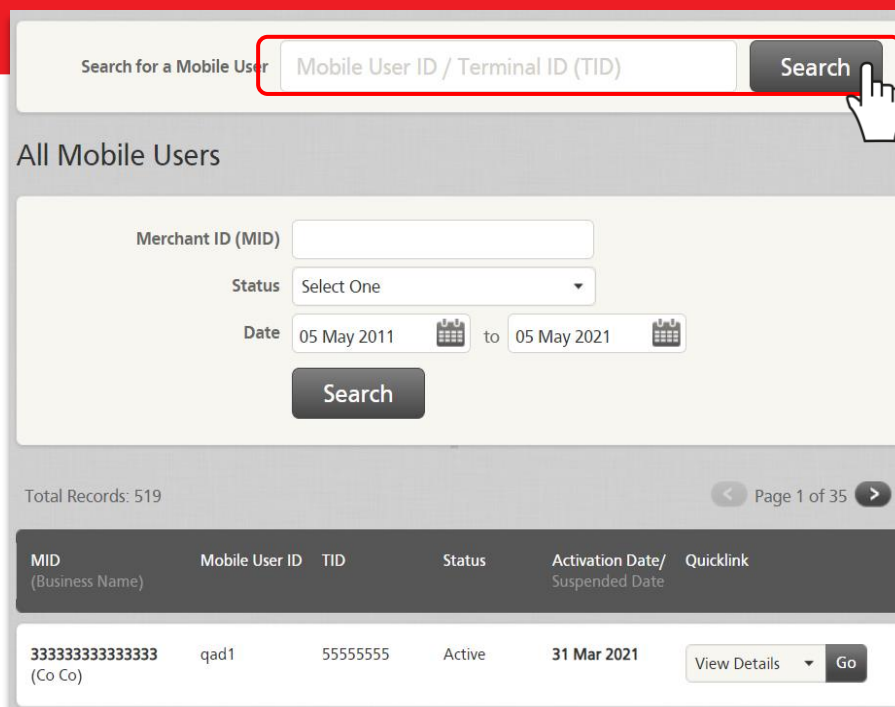
Step 1:

From the home page, click on Mobile User Summary.



Step 2:

Enter the Mobile User ID in the search field and click the 'Search' button.



PIN RESET FOR MOBILE USERS

Step 3:

Select 'View Details' from the mobile user's Quick link dropdown box and click Go.

Search for a Mobile User

All Mobile Users

Merchant ID (MID)

Status

Date to

Total Records: 519 Page 1 of 35

MID (Business Name)	Mobile User ID	TID	Status	Activation Date/ Suspended Date	Quicklink
3333333333333333 (Co Co)	qad1	55555555	Active	31 Mar 2021	View Details <input type="button" value="Go"/>

Step 4:

Click on the 'Reset User PIN' button and then select 'Continue'. A PIN reset email will be sent to the Mobile User.

Mobile User Details

Activation Date: 25 Mar 2021

Company Details

Business Name: Caltex
Terminal ID (TID): 12345112

Mobile User Details

Mobile User ID: vechology01
Name: Richmond
Contact No: +6 017 - 3138324
Email Address: richmondly.rj@softspace.com.my

Authorisation

- ✓ Able to perform void payment on the mobile app
- ✓ Able to perform credit settlement on the mobile app
- ✓ Able to perform QR Refund

Single Sign On (SSO)

- ✓ Enable manual login for mobile app

Allow Unattended Usage

- ✗ Payment terminal is attended

Enable Coupon Acceptance

- ✗ Coupon acceptance is disabled

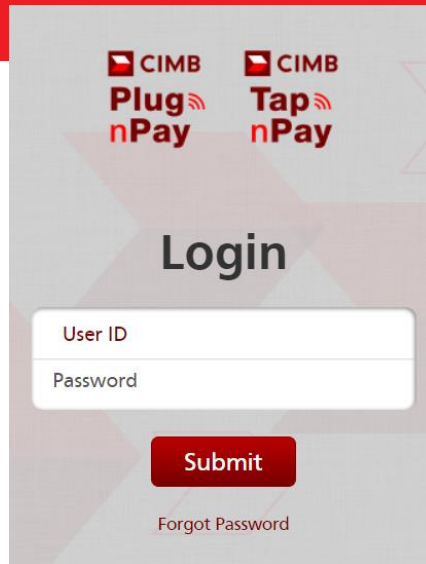
MID

Merchant ID (MID)	Payment Type	Plan Code	Term
✓ 12345112334455	Retail	-	-

MERCHANT PORTAL PASSWORD RESET

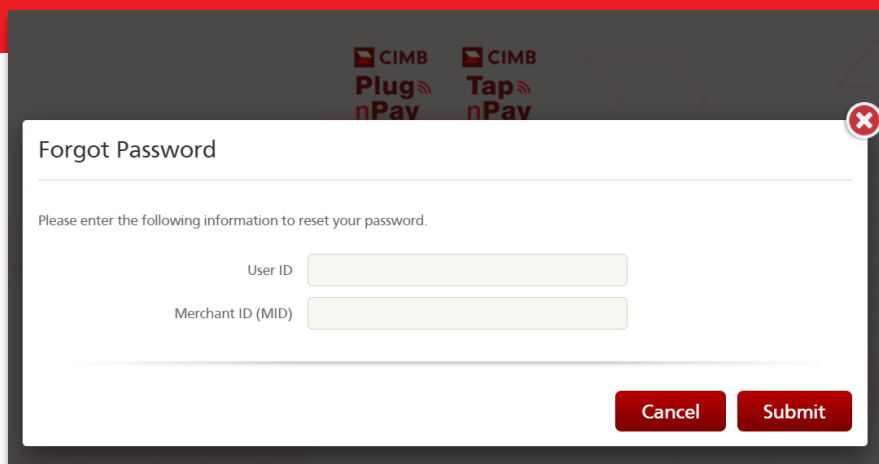
Step 1:

At the login page, click on 'Forgot Password'.



Step 2:

Enter your User ID and Merchant ID (MID) and click 'Submit'.
A PIN reset email will be sent to User ID's registered email.



Note: Refer to your activation email for your User ID and Merchant ID

MERCHANT PORTAL PASSWORD RESET

Step 3:

Click on the link in the email which will lead to this Reset Password screen.
Enter the new password.



The screenshot shows the 'Reset Password' screen of the CMB Merchant Portal. At the top, there are logos for 'CMB Plug n Pay' and 'CMB Tap n Pay'. The main heading is 'Reset Password'. Below the heading, the 'Merchant ID (MID)' is displayed as '88763456789123'. There are three input fields: 'New Password', 'Retype Password', and 'Activation Code'. Below the 'Activation Code' field, there is a link for 'Request Activation Code'. A red 'Submit' button is located at the bottom of the form. At the very bottom of the page, there is a footer with 'Terms & Conditions' and 'Privacy Policy' on the left, and 'All rights reserved. Copyright © 2013 CMB Bank (Malaysia) Bhd. (101017001-000)' on the right.

REINSTATING SUSPENDED MOBILE USERS

Step 1:

From the home page, click on 'Mobile User Summary'.

The screenshot shows the CIMB mobile banking dashboard. At the top, there are logos for CIMB Plug n Pay and Tap n Pay, along with user information and a LOGOUT button. Below the navigation bar, there is a 'Daily Transaction Snapshot' card showing a total amount of 0.00 RM. The main area is divided into several sections: 'Manage Mobile Users', 'Readers', 'Transactions', 'Credit Settlements', 'Settings', and 'Administrator'. In the 'Manage Mobile Users' section, the 'Mobile User Summary' option is highlighted with a red box.

Step 2:

Enter the Mobile User ID in the search field and click the 'Search' button.

The screenshot shows the 'All Mobile Users' search interface. At the top, there is a search field with the placeholder text 'Search for a Mobile User' and the input text 'Mobile User ID / Terminal ID (TID)'. A 'Search' button is located to the right of the search field, and a hand icon is pointing to it. Below the search field, there is a 'Status' dropdown menu set to 'Select One' and a 'Date' range selector from '01 May 2018' to '01 Aug 2018'. A 'Search' button is located below the date range. The results section shows 'Total Records: 3' and 'Page 1 of 1'. A table with the following columns is displayed: Mobile User ID, Name, TID, Status, Activation Date/ Suspended Date, and Quicklink. The table contains one row with the following data: bctest01, Test01, 18052307, Active, 01 Aug 2018. Below the table, there is an 'Export to CSV' button.

Mobile User ID	Name	TID	Status	Activation Date/ Suspended Date	Quicklink
bctest01	Test01	18052307	Active	01 Aug 2018	View Details <input type="button" value="Go"/>

REINSTATING SUSPENDED MOBILE USERS

Step 3:

Select 'Reinstate Mobile User Access' from the suspended mobile user's Quick Link dropdown box and click Go.

Search for a Mobile User

All Mobile Users

Merchant ID (MID)

Status

Date to

Total Records: 519 Page 1 of 35

MID (Business Name)	Mobile User ID	TID	Status	Activation Date/ Suspended Date	Quicklink
33333333333333333333 (Co Co)	qad1	55555555	Suspended	31 Mar 2021 / 05 May 2021	Reinstate <input type="button" value="Go"/>

Step 4:

Select 'Reinstate' from the dropdown menu for Reason and enter remarks (e.g. reinstate or reset etc.). Click Submit.

A system generated email will be sent to the Mobile User for activation.

Reinstate Mobile User Access

1 Details 2 Complete

Mobile User ID : qad1

Effective Date : 05 May 2021

Reason

Max characters: 250 241 remaining

IMPORTANT NOTICE

The CIMB Plug N Pay and CIMB Tap N Pay is a secure platform for the management and monitoring of card readers and mobile user transactions, performing settlements and account reconciliation.

Important Notice:

a) CIMB Plug n Pay / CIMB Tap N Pay Web Portal and Mobile App

Web Portal Browser Min. Requirement	
Internet Explorer	Ver. 8+
Google Chrome	Ver. 38+
Mozilla Firefox	Ver. 33+
Safari	Ver. 6+

Mobile App Requirement	Android 5 - 6	Android 7 & Above	iOS 9 & Above
CIMB Tap and Pay	X	√	X
CIMB Plug and Pay	√	√	√

b) Card Acceptance:

- No multiple charge
- No split sales
- Match signature in signature screen with cards (for Non Chip & PIN card)
- No surcharge to customer
- No personal cash advance
- DO NOT set minimal transaction amount to accept card payment

Bank will hold payment if there is any violation and/or customer's dispute. Cashiers shall refer to their Supervisor if there is any suspicious transaction or call CIMB BANK Authorization at +603 6204 7000 for further advise.

