ROAMmerchant Login

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Creating a New Profile

Posted: Nov 20, 2019

A profile is a default set of configurations defined by either a Client or a Sub-Client. A profile is generally based on payment transaction features for an industry vertical (such as Retail, Restaurant, QSR, Mini-store, ...) and the parameters required by the processor integrated within that profile.

Thus, a profile is a template that combines permissions defined by a Client/Sub-Client for a merchant organization along with abilities of the processor that serves those merchants. Every merchant organization belongs to some profile.

1. First, log in to ROAMsupport6 by following the steps outlined here.

2. On the sidebar, open the **Clients** menu.



3. Click on View Client, under the Clients menu.

4. You will now be presented with the Client Details page, as shown below. Click on the **Create Profile** button, along the top banner.

CI	Client Details				
	+ CREATE PROFILE	ION TOKENS	PRINT		
	Client Information				
	Organization ID	5122			
	Organization Name	ACME Industries			
	Organization Type 🕕	Client			
	Address 1 🕕	75 Federal Street			
	Address 2 🕕	_			
	City 💿	Boston			
	State 🕕	MA			
	Country 💿	US			
	Zip 🛞	02110			
	Parent Organization ID	1			

	Status 🕕	Active	

5. Next, you'll be shown the Create Profile screen. This will show a comprehensive list of all configurable options for creating a profile underneath a specified client. By default, the profile will be created for the logged-in client.

Create Profile			
Client Selection			
* Client: 🕦	ACME Industries		
Account Information			
* Profile Name: 🕕	Enter Profile Nam	e	
* Processor:	Select a Processo	r v	
Profile Configuration			
Tender Type: 🕕		Cash Card	
Locale: 🕕		Select a Value	
Board New Sub-Merchant(s	: ()		
Manage Sub-Merchant(s):			

6. Once you have filled in the applicable fields, click on the **Create** button at the bottom to create the profile.

Initiate Refunds On ROAMmerchant:	
Initiate Refunds On POS:	
Smart Refund Enabled:	
Unconnected Refund:	
Merchant Can Initiate A Void:	
Session Timeout - Token: 🕕	
Reset	Create

6. If successful, you'll be prompted with a successful notification as shown below. You'll have the option to create another profile, or view the profile just created.

Ar	PROFILE CREATION SUCCESSFL	IL!
E	You've successfully created a new Profile.	
nc	Would you like to create another Profile or view the newly created Profile?	
nc Create Profi	e	View Profile
d Refund:		

