MENTOR
USER GUIDE

Mentor Dashboard provides reporting that helps merchants understand their customers and gain rapid insights with real time data analytics. Mentor also has configurable user access controls via Profiles, Roles and Permissions.

In this document:

If you have any problems accessing the Mentor Dashboard or have any questions, please contact our support team for further assistance.

1. HOME

Navigating Mentor

TERMINALS

This visualisation provides a summary of the statuses of terminals in a terminal fleet. It includes:

- **Active**: The terminal has transacted within the last two months
- **Inactive**: The terminal has not transacted in the last two months, but it has transacted the month before
- **Dormant**: the terminal has not transacted in the last three months

Hover over each bar for a breakdown of percentages.

TALLY

This shows the number of transactions and total transaction amount over a selected time period. Hover over the sales icon to get an exact figure.

SALES TRENDS

Compares the total sales between last month and the month before (data will start on Sunday and end on Sunday, and will include some extra days outside of the date range). Hover over each column for the precise sale amounts.

Select the "Last Month" and "Prev. Month" labels to hide and show the data from each month as necessary.

Toggle between like for like and date view.

The time comparison range is configurable using the slider at the bottom of the graph.

PAYMENT DATA

Compare transaction volume, dollars spent and refunds spent from the last full month to the previous month.

TRANSACTION STATISTICS

Displays a line graph with transaction volume and amount and compares the data with a prior time period that is configurable via the drop-down at the top right of the graph (either week, month, quarter or year).

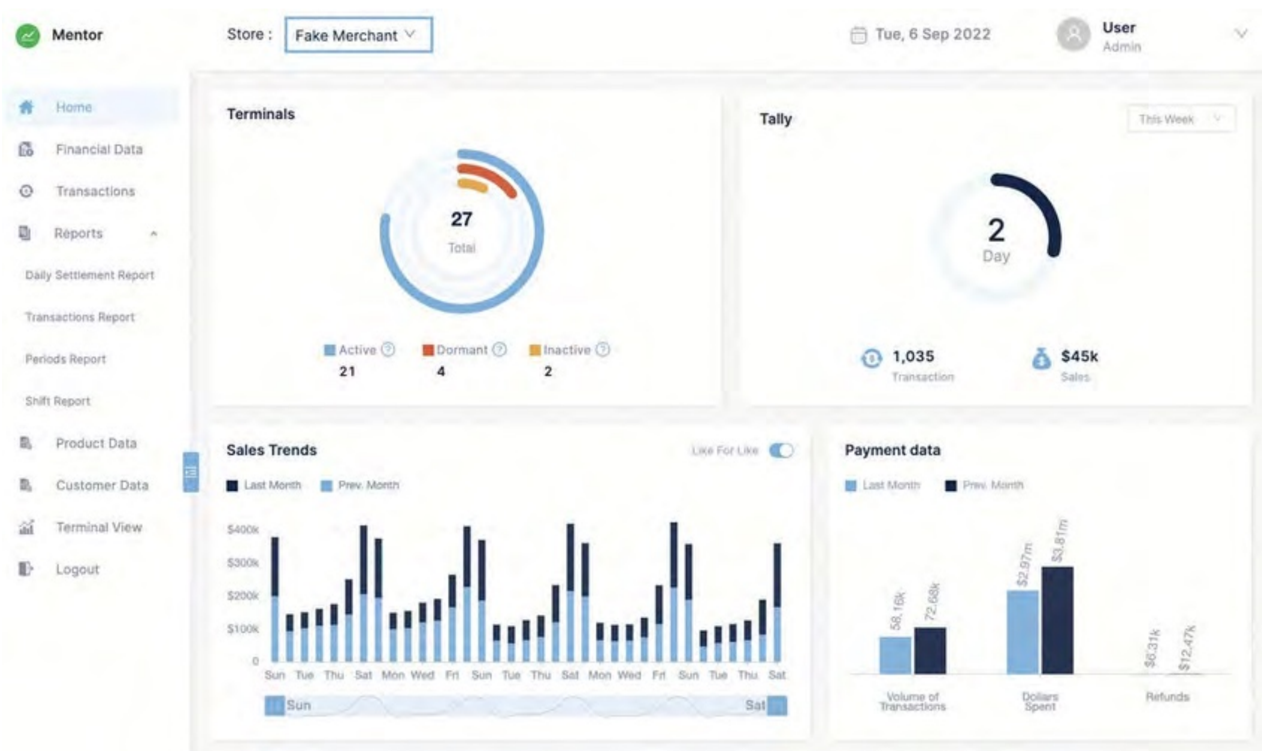
The time comparison period is configurable using the slider at the bottom of the graph.

It also compares a range of statistics sales and transaction statistics, comparing this month to the last month. These values do not change with the date range slider.

WIDGET CUSTOMISATIONS

Select the Widget Customisation icon to change the graphs and charts displayed on your Home dashboard. Add, move, resize and delete the visualisations on your dashboard.

Note: Widget customisation is available only in the home dashboard.



2. FINANCIAL DATA

SALES DATA

This visualisation gives a breakdown of total transaction value by card type. Use the date selector and the card drop-down to filter transactions.

'Other' transactions include all transactions that don't fall in the major scheme buckets displayed on the graph. They include payments done from a token (online transactions), and smaller payment types such as BP credit, BP debit and BP gift card payments (if enabled).

TALLY

This shows the number of transactions and total transaction amount over a selected time period. Hover over the sales icon to get an exact figure.

CUSTOM GRAPH

Displays a customisable graph that can show transactions, refunds and spend value over a configurable time period.

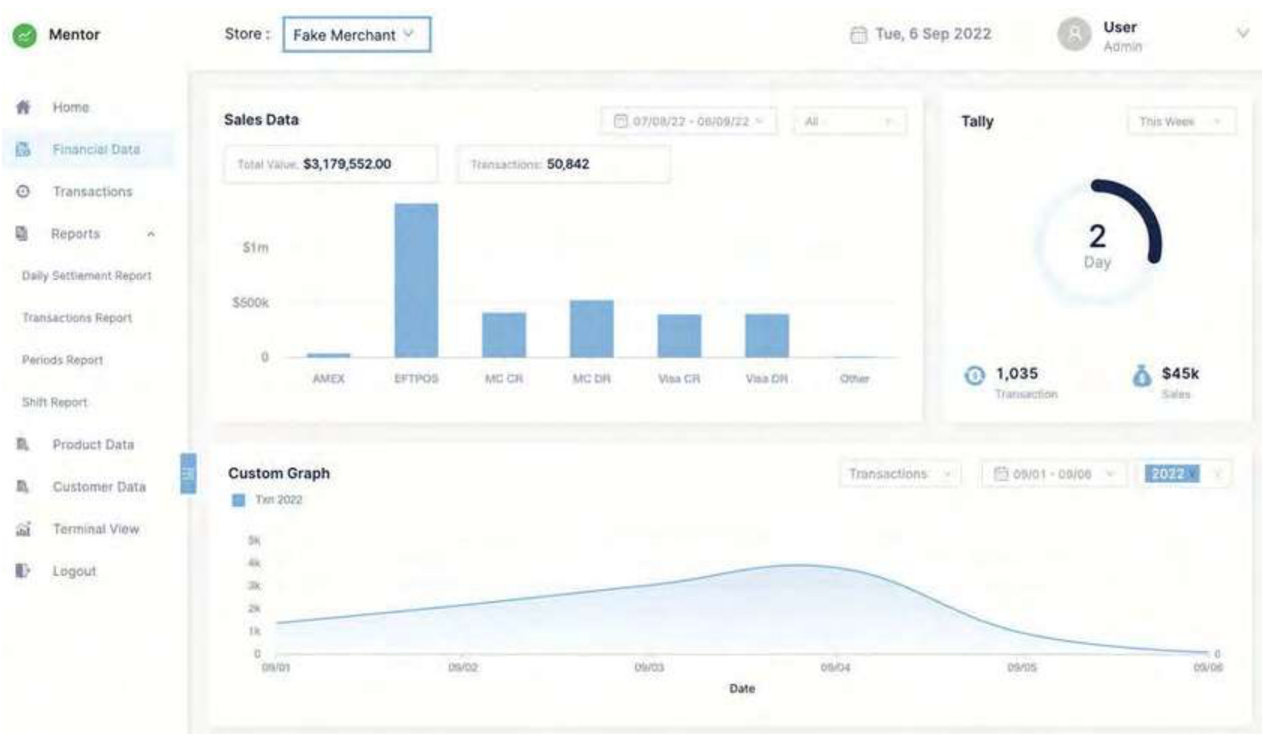
CASH FLOW

Total out tracks the total amount of cash-out transactions.

Total in tracks the total of purchase transactions minus refund transactions.

PAYMENT DATA

The graph compares transaction volume, dollars spent and refunds between the last full month and the previous full month.



3. TRANSACTIONS

TRANSACTION STATISTICS

Displays a line graph with transaction volume and amount and compares the data with a prior time period that is configurable via the drop-down at the top right of the graph (either week, month, quarter or year).

The time comparison period is configurable using the slider at the bottom of the graph.

It also compares a range of statistics sales and transaction statistics, comparing this month to the last month. These values do not change with the date range slider.

TALLY

This shows the number of transactions and total transaction amount over a selected time period. Hover over the sales icon to get an exact figure.

TRANSACTION

The transaction section displays a real-time list of transactions and associated payment details, such as the transaction date, the store, payment method, payment amount, cash-out (0 is no, 1 is yes), transaction description and status.

Selecting an individual transaction will display more details, depending on the data available for the transaction. See Appendix 3.1 for a list of the visible transaction fields.

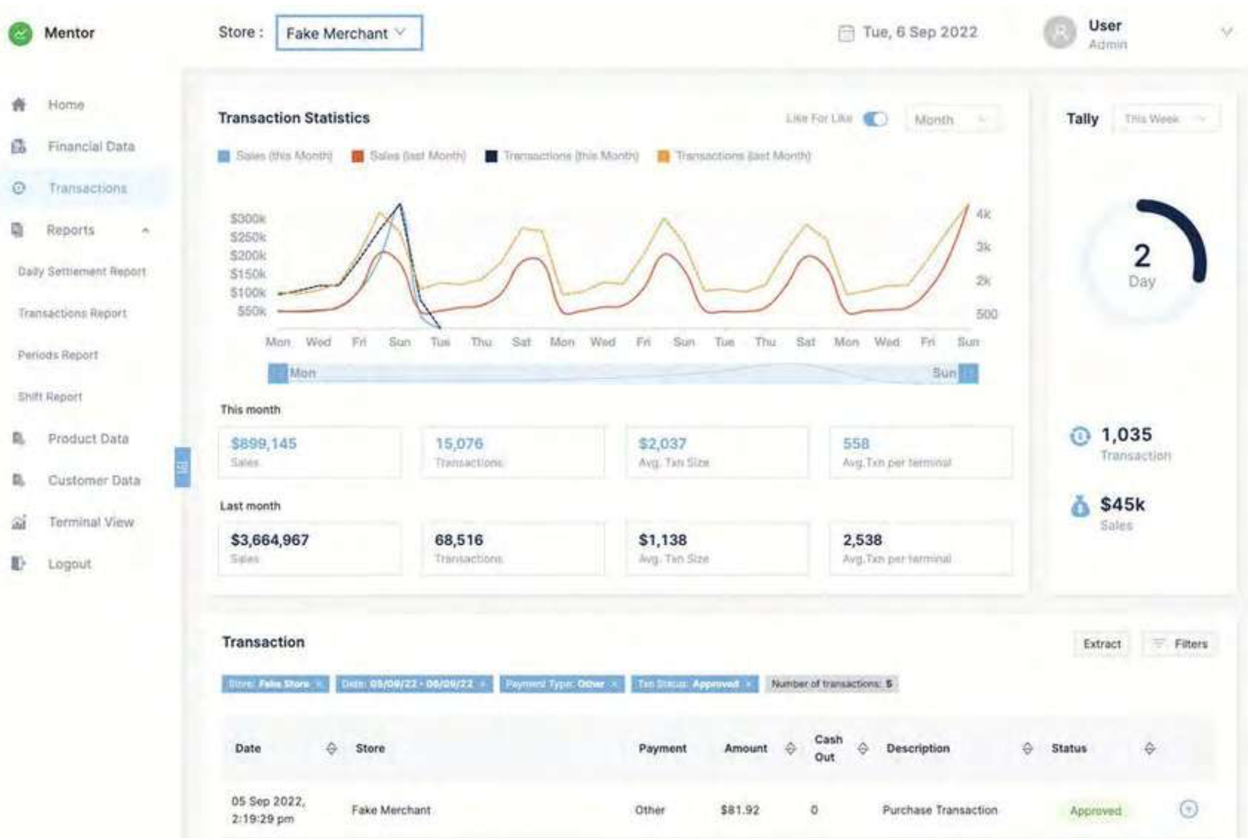
Clicking on sortable table headers will order the transactions by column in ascending order, clicking again will sort them by column in descending order, and clicking a third time will remove the sorting.

The filters button displays a set of filters that can be applied to the transaction list. Once applied, the filter will appear above the transaction list and can be cleared with the remove button.

Clear all filters by clicking on the Clear button.

The extract button initiates a download of the transaction list from your browser in CSV format. The extract will include richer transaction data that can be used for analysis or reporting purposes. See Appendix 3.2 for a list of the extractable fields.

Note: When extracting a large number of transactions, you will receive an email with a download link rather than the CSV downloading from your browser. It may take some time for the extract and email to your account.



4. REPORTS

4.1 Daily Settlement Reports

APPROVED PURCHASES

Shows a breakdown of approved transactions by store for a specified settlement date. Expanding an entry will display a breakdown of transactions by Point of Sale version.

Use the dropdown to filter details by card type.

APPROVED REFUNDS

Shows a breakdown of approved refunds by store location for a specified settlement date. Expanding an entry will display a breakdown of transactions by Point of Sale version.

Use the dropdown to filter details by card type.

SETTLEMENT

Displays a list of settled transactions for a specified date, configurable via the date filters at the top of the Daily Settlement Report page.

The filters button displays a set of filters that can be applied to the settlement transaction list. Once applied, the filter will appear above the list and can be cleared with the remove button.

Clear all filters by clicking on the Clear button.

4.2 Transactions Reports

BREAKDOWN

Displays a breakdown of transaction types.

TALLY

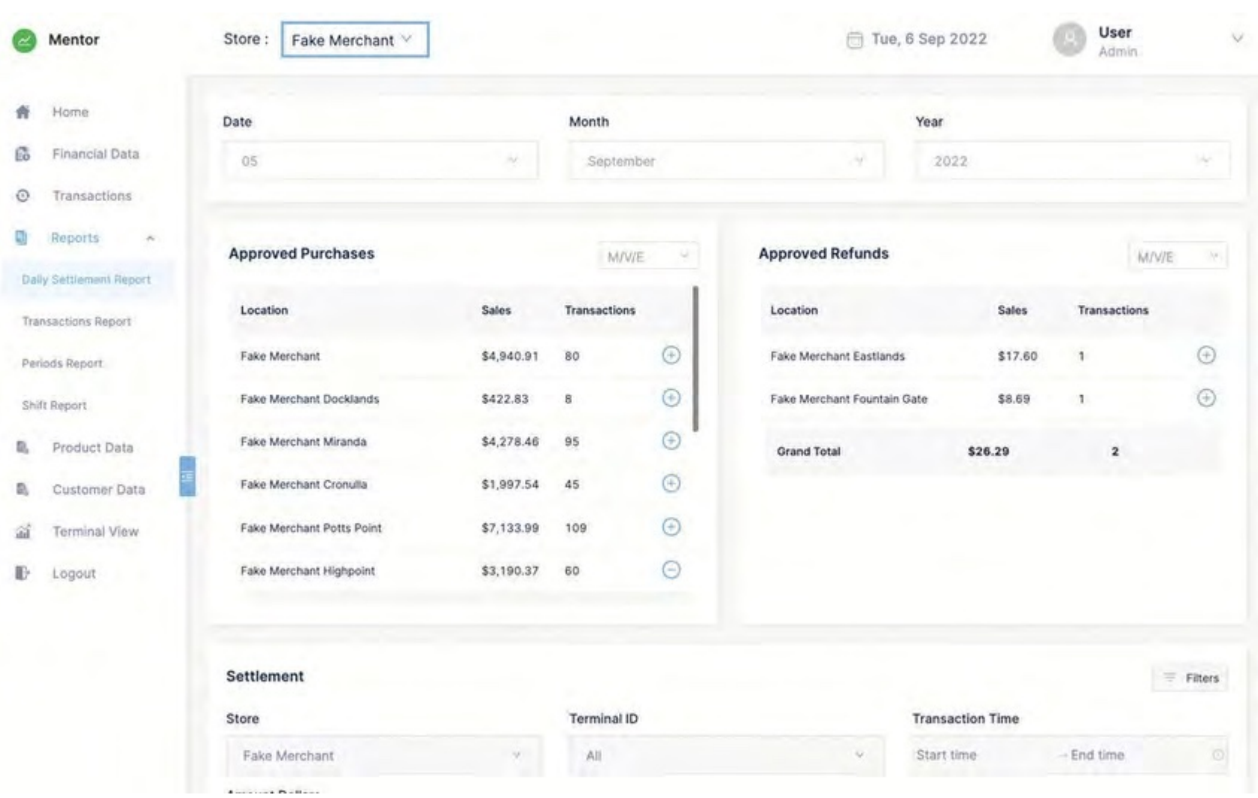
This shows the number of transactions and total transaction amount over a selected time period. Hover over the sales icon to get an exact figure.

TRANSACTION

Displays a list of transactions broken down by status. This includes approved, cancelled, declined and other transactions. Expanding an entry will display a breakdown of transactions by Terminal ID.

The filters button displays a set of filters that can be applied to the transaction list. Once applied, the filter will appear above the transaction list and can be cleared with the remove button.

Clear all filters by clicking on the Clear button.



4.3 Periods Report

TRANSACTION

This report allows you to compare the sales and transactions for a store between two custom date periods.

The filters button displays a set of filters that can be applied to the transaction list. Use the date dropdowns in this section to choose the two comparison date ranges. Once applied, the filter will appear above the transaction list and can be cleared with the remove button.

Click on sortable table headers to order the transactions by the selected column.

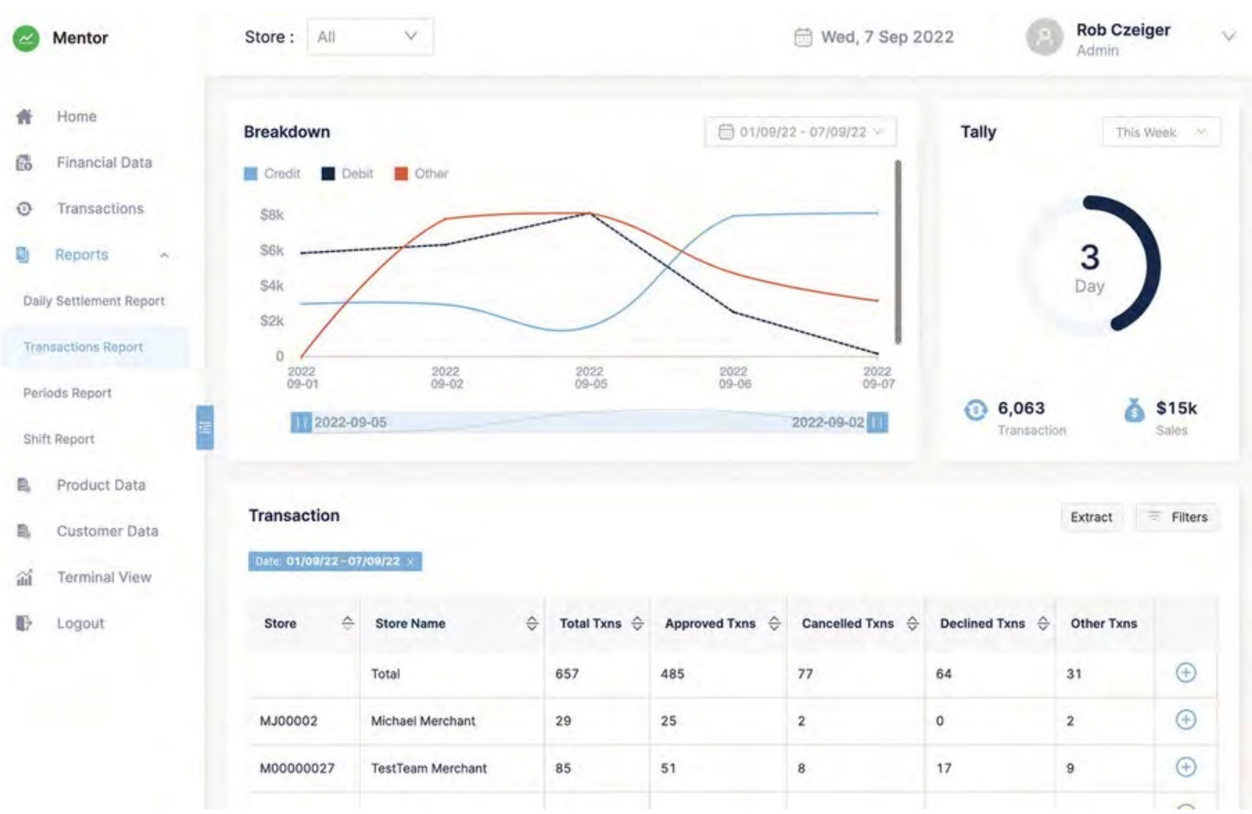
The extract button initiates a download of the Periods Report from your browser in CSV format. The data in the CSV download is the same as the data displayed in Mentor.

4.4 Shift Reports

Shift reports display a breakdown of purchases, surcharges and tips over a shift. Shifts are managed via the Point of Sale.

The filters at the top of this screen can specify a time period for the data.

The extract button initiates a download of the Shift Report from your browser in CSV format. The data in the CSV download is the same as the data displayed in Mentor.



5. PRODUCT DATA

FILTERS

The filters at the top of this screen can specify a time period for the data and categories for drilling down into product detail.

Note: multiple categories can be added to the Category drop-downs.

TOP 5 CATEGORIES

Shows a breakdown of the top 5 categories. Hover over the segments for the top products within a category.

You can view the categories by sale value or by sale volume.

TOP 5 COMBINATIONS

Shows the combinations with the highest volume. Click on each combination for more detail on specific combinations.

CATEGORY SALES

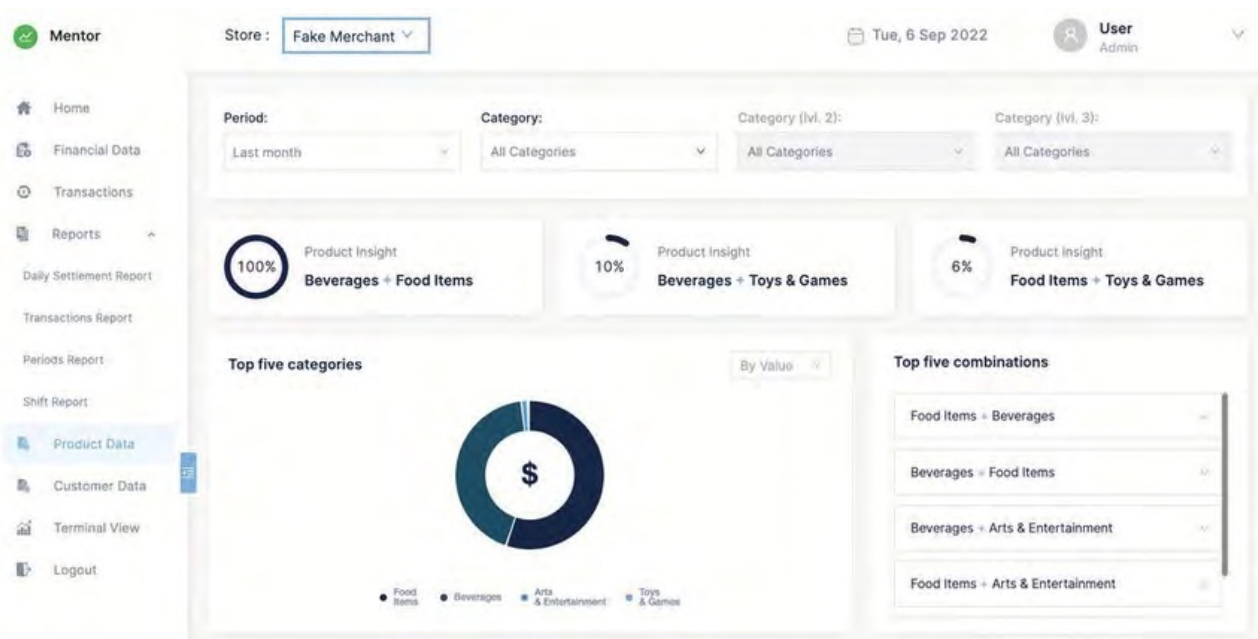
Compares category sales as a percentage.

CATEGORY SALES OVER TIME

Graph displays when you select a category. Shows the category sales over time. Use the toggle to switch between dollars and volume.

CATEGORY TRENDS

Graph displays when you select a category. Shows the category sales trends over time. Use the toggle to switch between dollars and volume.



6. CUSTOMER DATA

SALES BY VISITS

Visualisation calculates customers who visit more than three times/total sales. This is to show repeat or known customers.

TOP 20% OF CUSTOMERS

Displays the item category purchased by the top 20% of customers. Use the time drop-down to analyse a different time range.

TALLY

Displays the number of customers within a time period. Use the time drop-down to analyse a different time range.

CUSTOMER BREAKDOWN

Compares the number of new, returning and total customers.

The time comparison period is configurable using the slider at the bottom of the graph.

SALES TRENDS

Compares the sales between the same day last month.

The time comparison period is configurable using the slider at the bottom of the graph.

CUSTOMERS

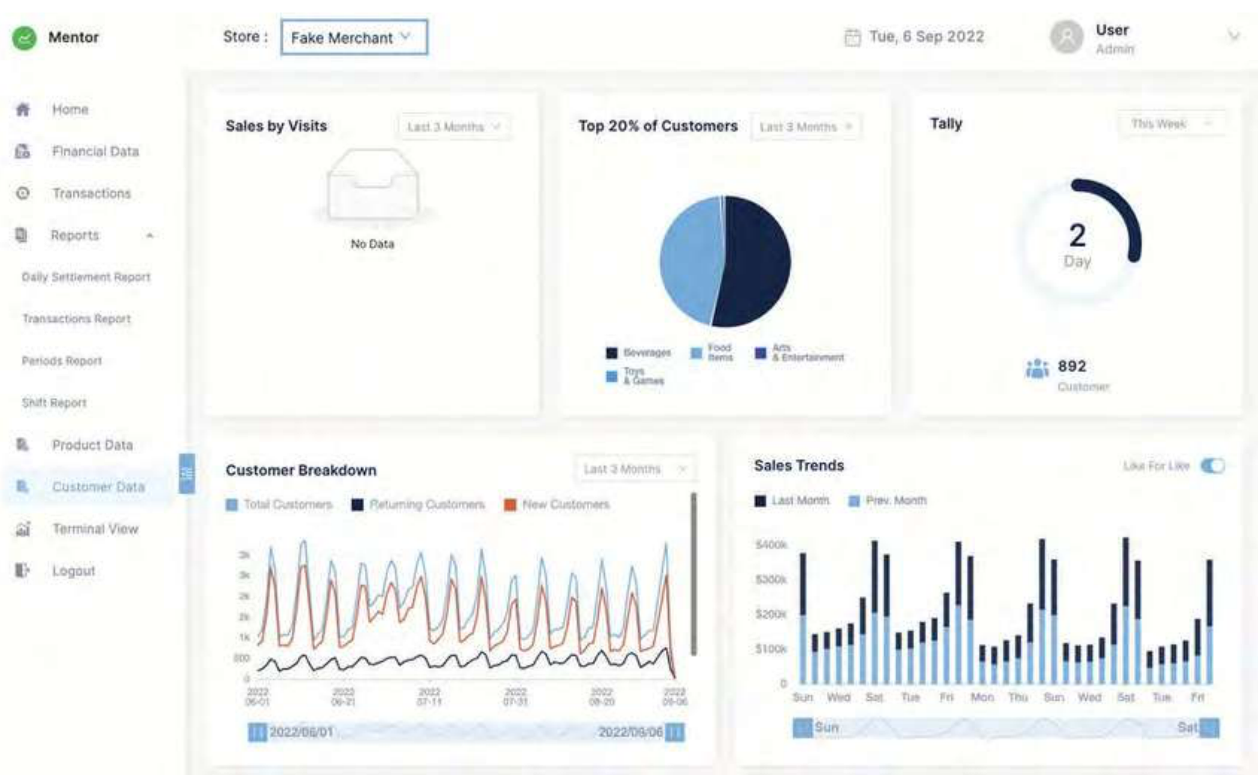
This table displays a list of customers.

The filters button displays a set of filters that can be applied to the transaction list. Once applied, the filter will appear above the transaction list and can be cleared with the remove button.

Clear all filters by clicking on Clear button.

Click on sortable table headers to order the transactions by the selected column.

The extract button initiates a download of the customer list from your browser in CSV format. The data in the CSV download is the same as the data displayed in Mentor.



7. TERMINAL VIEW

FILTERS

The filters at the top of this screen can specify a terminal manufacturer, terminal model or a software version.

TRANSACTION STATISTICS

Displays a line graph of transactions over time. It compares the data with a prior time period that is configurable via the drop-down at the top right of the graph (either week, month, quarter or year).

The time comparison period is configurable using the slider at the bottom of the graph.

TERMINALS % ACTIVE

This visualisation provides a summary of your terminal fleet. It includes:

- **Active**: The terminal has transacted within the last two months
- **Inactive**: The terminal has not transacted in the last two months, but it has transacted the month before
- **Dormant**: the terminal has not transacted in the last three months

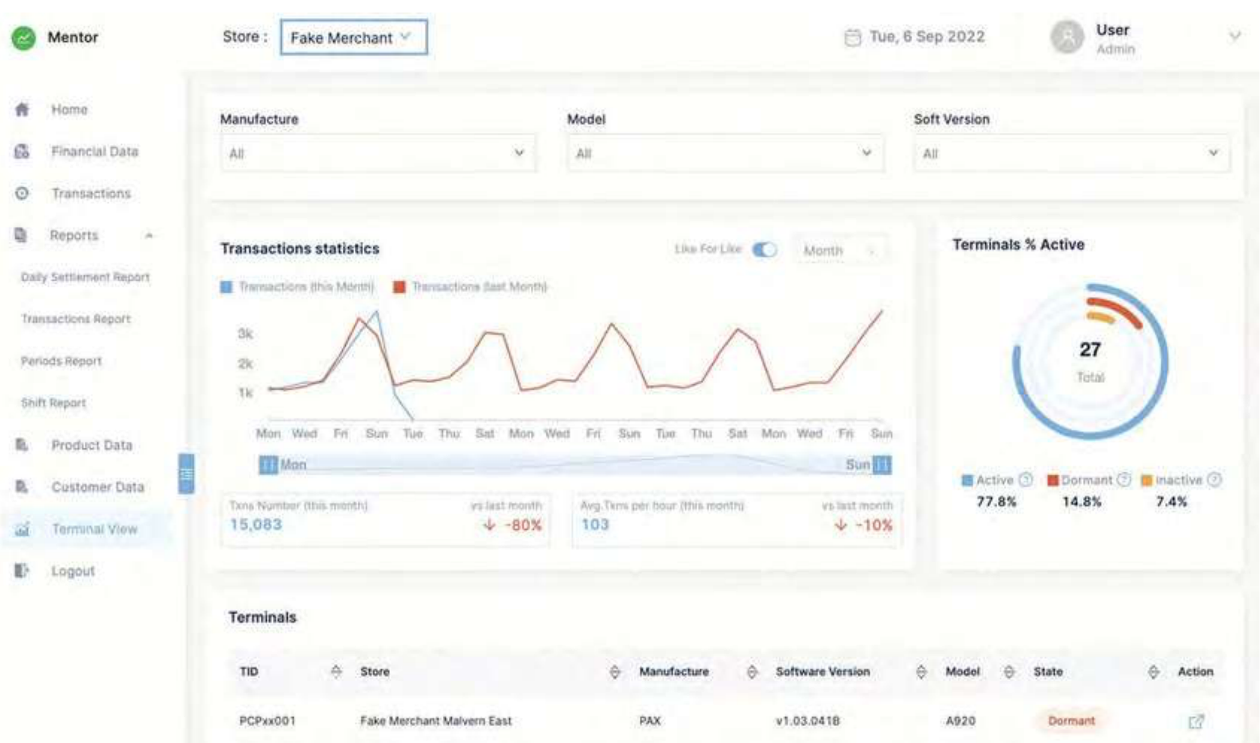
SOFTWARE VERSION

This visualisation provides a summary of the software versions on terminal fleet. Use the toggle to switch between % and Number views. Hover over the image for additional detail. Click on the chevron in Details box at the bottom of tile for software version.

TERMINALS

This table displays a list of customers. Click on sortable table headers to order the transactions by the selected column.

Clicking on the icon in the Action column will show a range of details about a terminal. See appendix 7.1 for a list of the details and meanings.



APPENDIX

3.1 Transaction Expand Fields

FIELD	DESCRIPTION
Settlement Date	Date on which the transaction was settled
Terminal ID (TID)	Unique ID assigned to each of our terminal devices
Merchant ID (MID)	Unique ID assigned to each of our merchants
Acquirer Terminal ID	Unique ID used by our acquirer
Acquirer MID	Unique ID used by our acquirer
Payment Type	Payment option used by the customer
Account	Credit, debit or other
Payment Method	Method used to complete the payment, eg. contactless, chip or magstripe
Account Identified	Masked PAN number
Transaction ID	Unique ID assigned to each of our transactions
RRN	Relative record number
STAN	System Trace Audit Number. Used internally to identify transactions
Point of Sale (POS)	Point of Sale type, if the terminal is connected to a Point of Sale (POS)
Integrated/ Standalone	Whether a terminal is operating in Standalone mode or connected to a POS system
Declined Reason Code	Shows reasons when there's no way to complete a transaction and give a reason
Products	Items purchased by the customer

3.1 Transaction Extract Fields

FIELD	DESCRIPTION
Transaction Date	Date of the transaction
Transaction Time	Time of the transaction
Settlement Date	Date on which the transaction was settled
Store Name	Name of the store where the transaction took place
Card Type	Card type used by the customer, eg. Visa, Mastercard, Eftpos
Purchase Tip	Tip amount applied to a transaction
Surcharge	Surcharge amount applied to the transaction
Transaction Amount	Total transaction amount
Transaction Status	Currently not in use
Transaction Description	Currently not in use
Terminal ID (TID)	Unique ID assigned to each of our terminal devices
Merchant ID (MID)	Unique ID assigned to each of our merchants
Acquirer MID	Unique ID used by our acquirer
Acquirer Terminal ID	Unique ID used by our acquirer
Account	Currently not in use
Cash Out	Flags cash-out transactions, 1 for cash-out and 0 for non cash-out
Payment Method	Currently not in use
Account Identified	Masked PAN number
Transaction ID	Unique ID assigned to each of our transactions
RRN	Relative record number
STAN	System Trace Audit Number. Used internally to identify transactions
Point of Sale (POS) Integrated/ Standalone	Whether a terminal is operating in Standalone mode or connected to a Point of Sale (POS) system
Declined Reason Code	Shows reasons when there's no way to complete a transaction and give a reason
BP Gift Card Txn ID	Transaction ID used for BP Gift Card transactions, and will be blank unless transaction is done using a BP Gift Card
Crypto Txn ID	Transaction ID used for Crypto transactions, and will be blank unless transaction is done using Crypto
Qantas Txn ID	Transaction ID used for Qantas transactions, and will be blank unless transaction is done using Qantas points

7.1 Terminal Details

BASE INFO

HEADER	OPTIONS/EXAMPLE	DESCRIPTION
Manufacturer	PAX	Company that manufactures the terminal hardware
Model	A930	Terminal model
Software Version	eg. v1.03.043A	Software version running on the terminal
Operating System	eg. IM30_A80_ PayDroid_7.1.1_Taurus _ V05.3.07_20200804	Operating system running on the terminal
Last Full Charge	eg. 2	Days since the terminal was last fully charged
Last Login Date/Time	eg. 2020-12-05 09:18:22	Date and time since the last terminal logon
Last Txn Date/Time	eg. 2020-12-04 03:19:11	Date and time since the last terminal transaction

FEATURES

HEADER	OPTIONS/EXAMPLE	DESCRIPTION
Standalone	Yes or No	Whether or not the terminal is operating in Standalone mode or connected to a Point of Sale system
CloudPoint of Sale	Yes or No	If the terminal is connected to a point of sale system
Point of Sale App	Yes or No	If the terminal is integrated with Nexo interface
Cash Out	Yes or No	If the terminal has cash out transactions enabled
Purchase with Cash	Yes or No	If the terminal has purchase with cash transactions enabled
Refund	Yes or No	If the terminal has the option to perform refunds
Pre Authorisation	Yes or No	If the terminal has the option to perform pre-authorisation transactions
Completion	Yes or No	If the terminal has the option to perform completion transactions
Manual Settlement	Yes or No	If the terminal has the option to perform manual settlements
Purchase with Tip	Yes or No	If the terminal has the option to perform transactions with tips

PRINTING SETTINGS

HEADER	OPTIONS/EXAMPLE	DESCRIPTION
Customer Receipt Print	Never, Prompt, Always	Whether the terminal always, prompts for, or never prints customer receipts
Merchant Receipt Print	Never, Prompt, Always	Whether the terminal always, prompts for, or never prints customer receipts

PROCESSOR INFO

HEADER	OPTIONS/EXAMPLE	DESCRIPTION
Processor Name	NAB	Information sent to the processor, a system that enables our financial transactions
Acquirer Terminal ID	E00000	Information sent to the processor, a system that enables our financial transactions
Acquirer MID	53200000	Information sent to the processor, a system that enables our financial transactions

OTHER INFO

HEADER	OPTIONS/EXAMPLE	DESCRIPTION
Timezone	Australia/Perth	Displays the time zone in which the terminal is located
Serial Number	0822600000	A unique identifier assigned to identify our terminals
Host Connection Settings	A DMG URL	Information used by DMG to connect terminals to our back-end systems
Software Update Target	A DMG URL	Information used by DMG to update our terminal software
PLB	Enabled or Disabled	PLB (Product level blocking) prevents the purchase of restricted items (liquor, gambling etc.) by automatically detecting restricted items at a Point of Sale

Customer Support

If you have any problems accessing the Mentor Dashboard or have any questions, please contact our support team for further assistance.

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