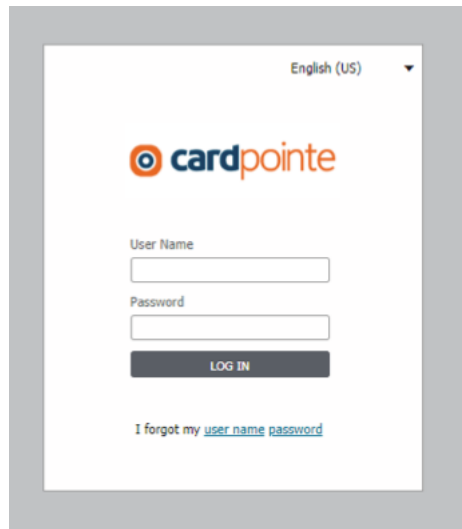



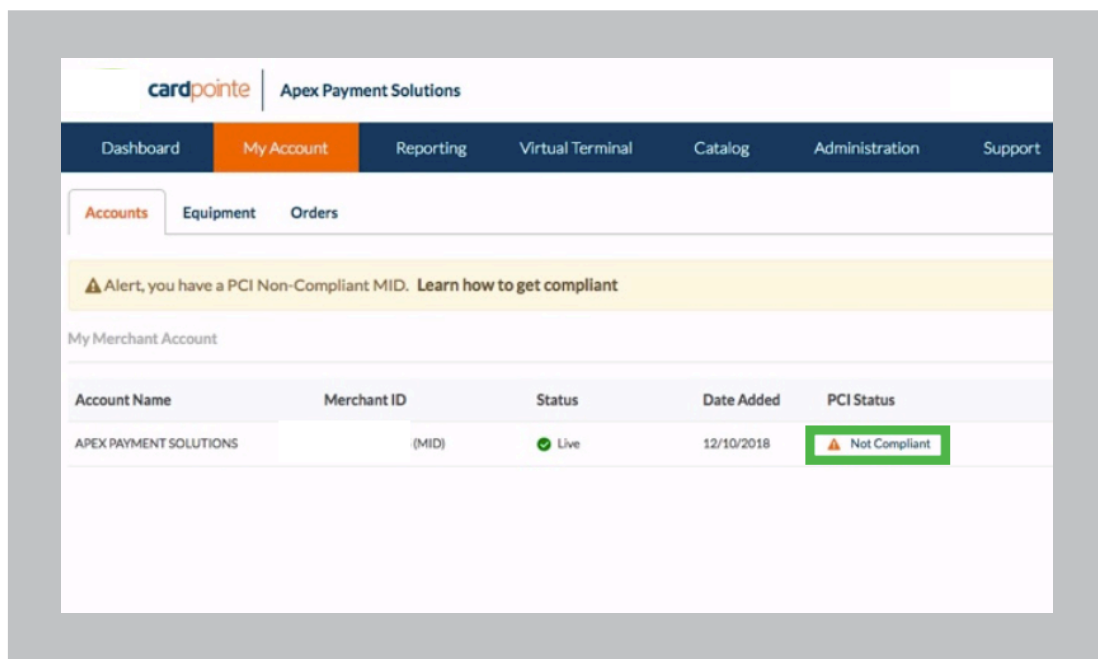
PCI Quick Start Guide

You've been upgraded! To access your upgraded PCI Manager account, please visit cardpointe.cardconnect.com/account. If you need to reset your password or username, please click below the log in button.

The image shows the Cardpointe login page. At the top right, there is a language dropdown menu set to "English (US)". In the center, the Cardpointe logo is displayed. Below the logo are two input fields: "User Name" and "Password". A dark grey "LOG IN" button is positioned below the password field. At the bottom, there is a link that says "I forgot my [user name](#) [password](#)".

English (US)

User Name <input type="text"/>
Password <input type="password"/>
LOG IN
I forgot my user name password

Once you log in to your account, go to the My Account Tab and then click on the Not Compliant text.

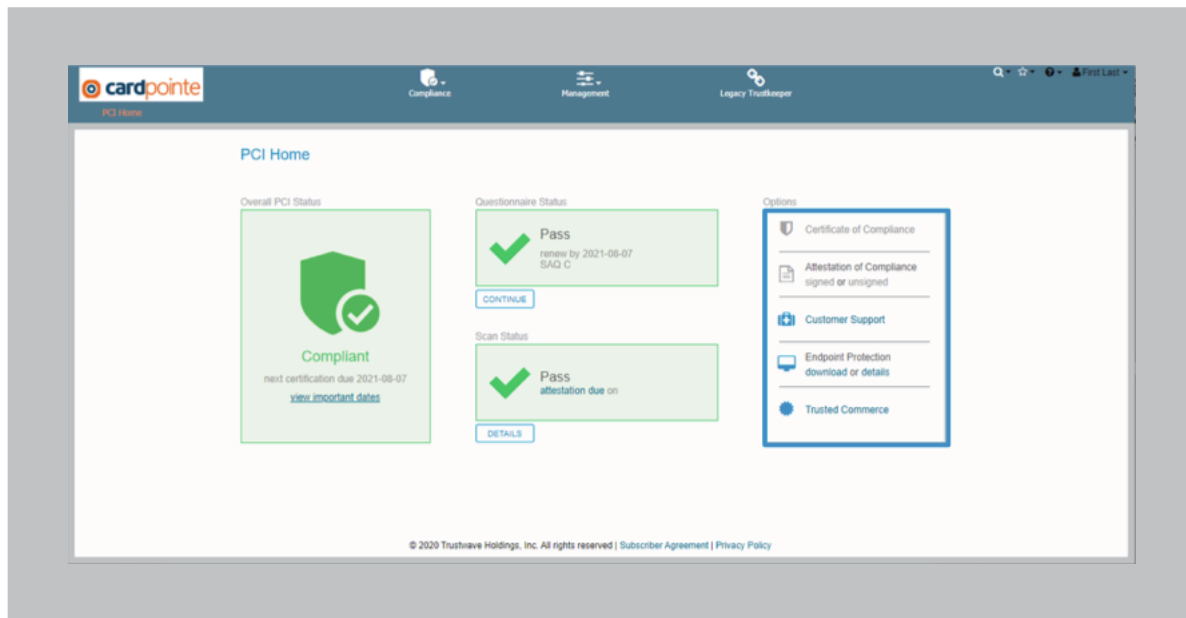
The image shows the Cardpointe "My Account" page. The top navigation bar includes "Dashboard", "My Account" (highlighted), "Reporting", "Virtual Terminal", "Catalog", "Administration", and "Support". Below this, there are tabs for "Accounts", "Equipment", and "Orders". A yellow alert banner states: "Alert, you have a PCI Non-Compliant MID. Learn how to get compliant". Under the "My Merchant Account" section, there is a table with the following data:

Account Name	Merchant ID	Status	Date Added	PCI Status
APEX PAYMENT SOLUTIONS	(MID)	Live	12/10/2018	Not Compliant

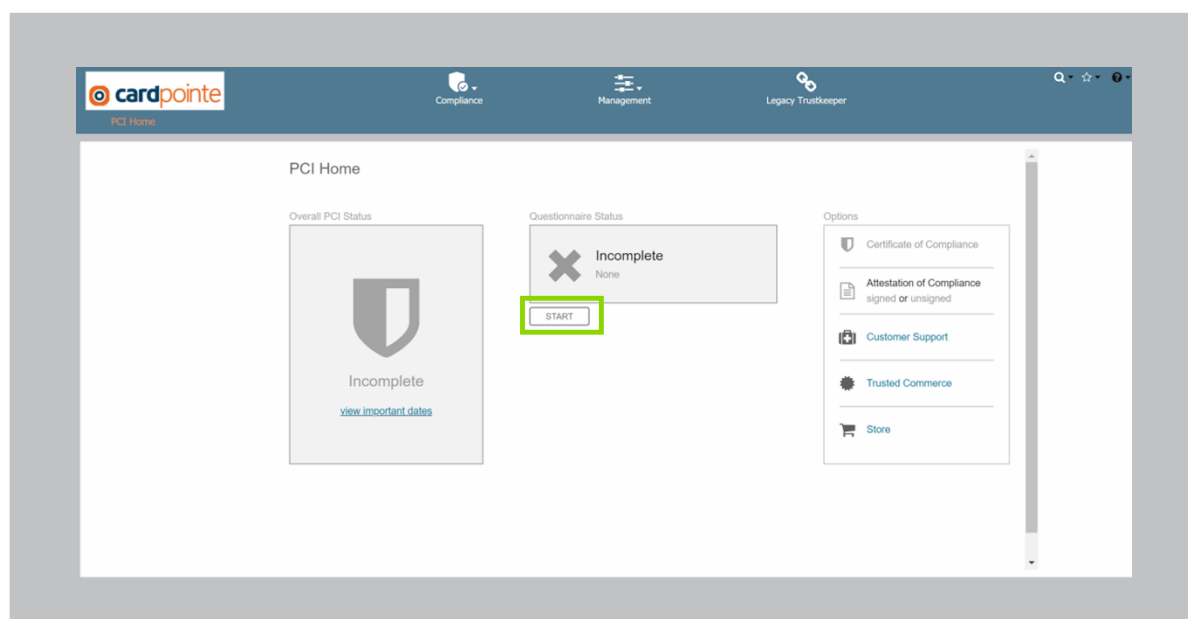
The "Not Compliant" text in the PCI Status column is highlighted with a green box.

As always, our support team can help with additional program or upgrade questions. For assistance, please call 800-270-7164 or email us at support@apexpaymentsolutions.com.

You will be directed to the PCI Home screen where you will be able to confirm your PCI Status, Questionnaire Status and Scan Status. If your overall PCI Status is compliant, you can download copies of your Certificate of Compliance and Attestation of Compliance under 'Options' on the right-hand-side of the screen.



If your questionnaire is non-compliant, incomplete or expired, simply click the 'continue' or 'start' buttons below the questionnaire status, to complete your questionnaire. **Be sure to choose the Expert form, not step-by-step.**



As always, our support team can help with additional program or upgrade questions. For assistance, please call 800-270-7164 or email us at support@apexpaymentsolutions.com.

Be sure to choose the Expert form version of the questionnaire.

The screenshot shows the Cardpointe PCI Questionnaire interface. At the top is a navigation bar with the Cardpointe logo and links for Compliance, Management, and Legacy Trustkeeper. The main heading is "Pick an assessment method". Below this are three options: "Guide Me" (with a pencil icon), "Expert" (with a document icon), and "Upload" (with a cloud icon). A tooltip points to the "Expert" option, stating: "Choose this option to be able to select from a list of available PCI SAQ forms to complete without step-by-step guidance. Next series of questions will help recommend a SAQ form." A "CONTINUE >" button is located at the bottom right.

Select all payment methods that you will use to accept payments via the check boxes.

The screenshot shows the Cardpointe PCI Questionnaire progress and content screen. The top navigation bar is the same as the previous screen. On the left, a progress bar shows "PCI Questionnaire" at 15% completion. Below the progress bar is a list of steps: 1. PCI Profile, 2. Company Profile, 3. Questionnaire, and 4. Confirmation. The "PCI Profile" step is expanded, showing sub-steps: "Acceptance Channels", "Payment Products", and "Form Selection". The main content area is titled "What Are The Ways You Accept Credit Card Payments" and includes the instruction "Select all that apply". There are three checkboxes: "My business has a physical location where payments with a credit card are made in-person" (checked), "My business allows payments with a credit card by mail or over the phone (MO/TO)" (unchecked), and "My business has a website where payments with a credit card are made online" (unchecked). At the bottom, there are buttons for "SAVE & EXIT", "BACK", "NEXT", and a "Help" icon.

As always, our support team can help with additional program or upgrade questions. For assistance, please call 800-270-7164 or email us at support@apexpaymentsolutions.com.

Choose the correct terminal/terminals you will be using at your practice. If using Clover device, choose Clover Flex or Clover Mini option. If using Cardpointe Mobile, Ingenico Desk3500, or Augusta, choose Cardconnect LLC CardSecure P2PE.

The screenshot shows the 'Payment Products' section of the Cardpointe PCI Questionnaire. The progress bar indicates 22% completion. The left sidebar shows the navigation menu with 'Payment Products' selected. The main content area has a heading 'Payment Products' and a sub-heading 'Identify any devices (e.g. POS terminals, EFTPOS, payment software applications, services, etc.) you use to process credit card purchases from your customers in person, on a mobile phone, or through mail order.' Below this, there are radio buttons for 'Existing Device' (selected) and 'No match, add new'. A search box contains the word 'clover', and a 'LOOKUP' button is next to it. A dropdown menu shows a list of devices: 'Clover Network Clover Flex', 'Clover Network Clover Mini', 'Clover Network Clover Mobile', 'Clover Network Clover Station', 'Clover Network Clover Mini (2nd Generation)', 'Clover Network Clover Station 5.0 EMV-NFC', and 'The Logic Group Solve DataShield P2PE Solution for VeriFone'. A 'Select version...' dropdown is below the list. To the right of the dropdown, there is a checkbox labeled 'P2PE Only' which is checked. Below the dropdown is an 'ADD' button. At the bottom, there is a checkbox labeled 'We do not use any devices to process card payments' which is unchecked. Navigation buttons at the bottom include 'SAVE & EXIT', 'BACK', 'NEXT', and 'Help'.

If using P2PE certified devices (Clover Mini, Clover Flex, Ingenico Desk 3500, Cardpointe Mobile 3300, Augusta), select the PCI SAQ P2PE 3.2.1 v1.0 questionnaire option and check all boxes on the right-hand side.

The screenshot shows the 'Choose Your PCI Self-Assessment Questionnaire (SAQ)' section of the Cardpointe PCI Questionnaire. The progress bar indicates 28% completion. The left sidebar shows the navigation menu with 'Questionnaire' selected. The main content area has a heading 'Choose Your PCI Self-Assessment Questionnaire (SAQ)' and a sub-heading 'Select the SAQ form most applicable to your business. Note that some forms have eligibility criteria that have to all be met. If you are unsure, click Back and select the form which will guide you through the process.' Below this, there is a list of SAQ options with radio buttons: 'PCI SAQ A 3.2.1 v1.0', 'PCI SAQ A-EP 3.2.1 v1.0', 'PCI SAQ B 3.2.1 v1.0', 'PCI SAQ B-IP 3.2.1 v1.0', 'PCI SAQ C 3.2.1 v1.0', 'PCI SAQ C-VT 3.2.1 v1.0', 'PCI SAQ D 3.2.1 v1.0', 'PCI SAQ D-SP 3.2.1 v1.0', and 'PCI SAQ P2PE 3.2.1 v1.0'. The 'PCI SAQ P2PE 3.2.1 v1.0' option is selected and highlighted with a green box. To the right of the list, there is a section titled 'Confirm All Eligibility Criteria' with a red asterisk. Below this, there are several checkboxes: 'All payment processing is via the validated PCI P2PE solution approved and listed by the PCI SSC (per above).', 'The only systems in the merchant environment that store, process or transmit account data are the Point of Interaction devices which are approved for use with the validated and PCI-listed P2PE solution.', 'Merchant does not otherwise receive or transmit cardholder data electronically.', 'Merchant verifies there is no legacy storage of electronic cardholder data in the environment.', 'If Merchant does store cardholder data, such data is only in paper reports or copies of paper receipts and is not received electronically, and', and 'Merchant has implemented all controls in the P2PE Instruction Manual (PIM) provided by the P2PE Solution Provider'. At the bottom, there are navigation buttons: 'SAVE & EXIT', 'BACK', 'CONFIRM', and 'Help'.

As always, our support team can help with additional program or upgrade questions. For assistance, please call 800-270-7164 or email us at support@apexpaymentsolutions.com.

If using Virtual Terminal Only or Text to Pay Only, select the PCI SAQ C-VT 3.2.1 v1.0 questionnaire option and check all boxes on the right-hand side.

The screenshot shows the Cardpointe PCI Questionnaire interface. The top navigation bar includes the Cardpointe logo, 'PCI Questionnaire', and links for Compliance, Management, and Legacy Trustkeeper. On the left, a sidebar shows the progress: 1. PCI Profile (selected), 2. Company Profile, 3. Questionnaire, and 4. Confirmation. The main area displays a list of SAQ forms with radio buttons. 'PCI SAQ C-VT 3.2.1 v1.0' is selected and highlighted with a green box. To the right of the form list, there are several checkboxes, all of which are checked. At the bottom, there are buttons for 'SAVE & EXIT', 'BACK', 'CONFIRM', and a 'Help' icon. A progress bar at the top left indicates 28% completion.

Next, you will need to confirm your company profile information. First, confirm the contact details listed.

The screenshot shows the Cardpointe PCI Questionnaire interface at the 'Primary Contact Information' step. The top navigation bar is the same as the previous screen. The sidebar shows the progress: 1. PCI Profile, 2. Company Profile (selected), 3. Questionnaire, and 4. Confirmation. The main area is titled 'Primary Contact Information' and contains a message: 'Let's confirm your best contact information so we can ensure you are kept up to date on any important data security and compliance issues like when the PCI certificate expires.' Below this, there are input fields for 'Name', 'Email', and 'Phone'. At the bottom, there are buttons for 'SAVE & EXIT', 'BACK', 'NEXT', and a 'Help' icon. A progress bar at the top left indicates 36% completion.

As always, our support team can help with additional program or upgrade questions. For assistance, please call 800-270-7164 or email us at support@apexpaymentsolutions.com.

Then confirm your Account Details and answer the following questions on the right-hand side.

The screenshot displays the Cardpointe PCI Questionnaire interface. The top navigation bar includes the Cardpointe logo, 'PCI Questionnaire', and tabs for 'Compliance', 'Management', and 'Legacy Trustkeeper'. The left sidebar shows the progress: 1. PCI Profile, 2. Company Profile (selected), 3. Questionnaire, and 4. Confirmation. The 'Company Profile' section is active, showing a progress bar at 41%. The main form area contains fields for 'Industry', 'Primary Contact', 'Secondary Contact', 'Mailing Address', 'City', 'Country', 'State/Province', and 'ZIP/Postal Code'. To the right, there are three questions with radio button answers: 'Does your company share cardholder data with any third-party service providers...', 'Multiple Acquirer', and 'Payment Card Activity'. Each question has 'Yes' and 'No' options. At the bottom, there are 'SAVE & EXIT', 'BACK', 'NEXT', and 'Help' buttons.

Confirm your MID number. You can find this number under the "My Account" tab on the Cardpointe Platform.

The screenshot displays the Cardpointe PCI Questionnaire interface, now at the 'Questionnaire' section (3 of 4). The progress bar shows 46%. The main form area is titled 'Program Sponsor' and contains a table with the following data:

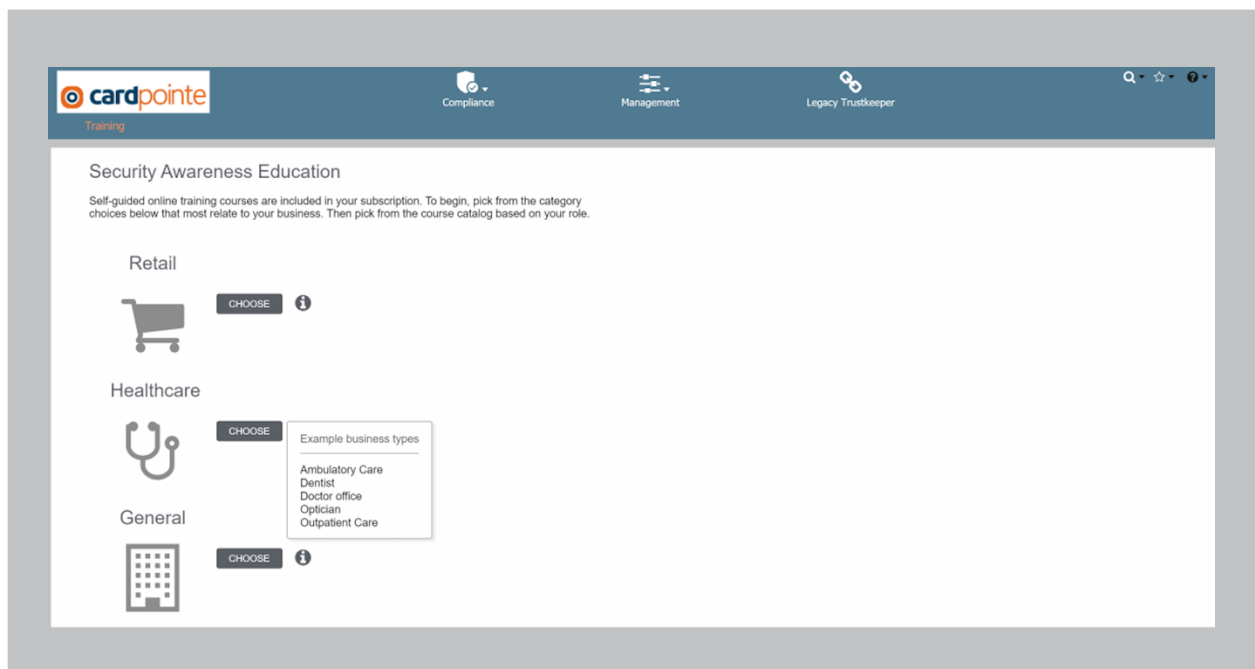
Program Sponsor	CardConnect
On File	Merchant ID
	Primary

Below the table, there is a green checkmark indicating the status is correct. A tooltip is visible over the 'CardConnect' text, stating: 'Your PCI compliance documentation and current status is automatically reported to CardConnect'. At the bottom, there are 'SAVE & EXIT', 'BACK', 'NEXT', and 'Help' buttons.

As always, our support team can help with additional program or upgrade questions. For assistance, please call 800-270-7164 or email us at support@apexpaymentsolutions.com.

Complete questionnaire and confirm answers. You will be notified immediately of your new PCI status and if there is any additional information needed to complete your questionnaire. If you have any questions, feel free to reach out to our Apex Support team at 800-270-7164 or support@apexpaymentsolutions.com.

Security Awareness Training is available after the confirmation stage.



As always, our support team can help with additional program or upgrade questions. For assistance, please call 800-270-7164 or email us at support@apexpaymentsolutions.com.