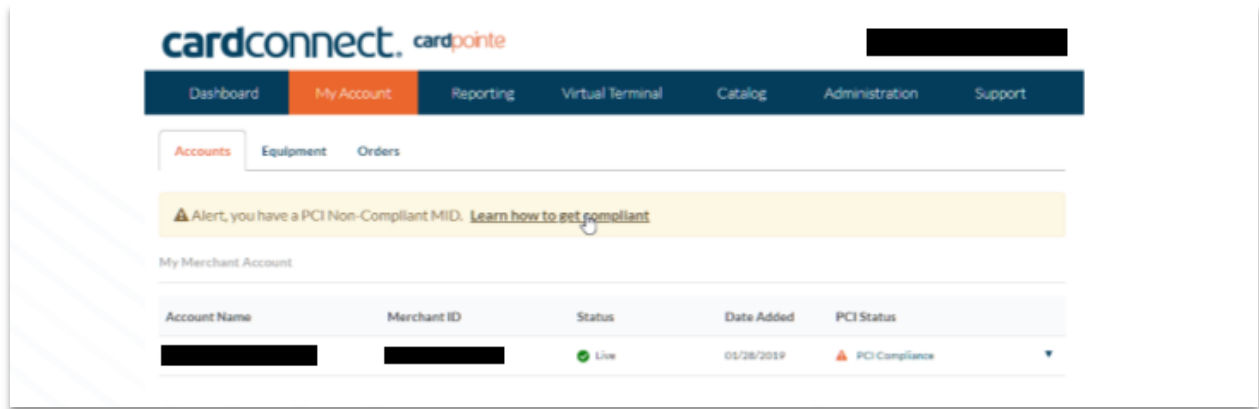
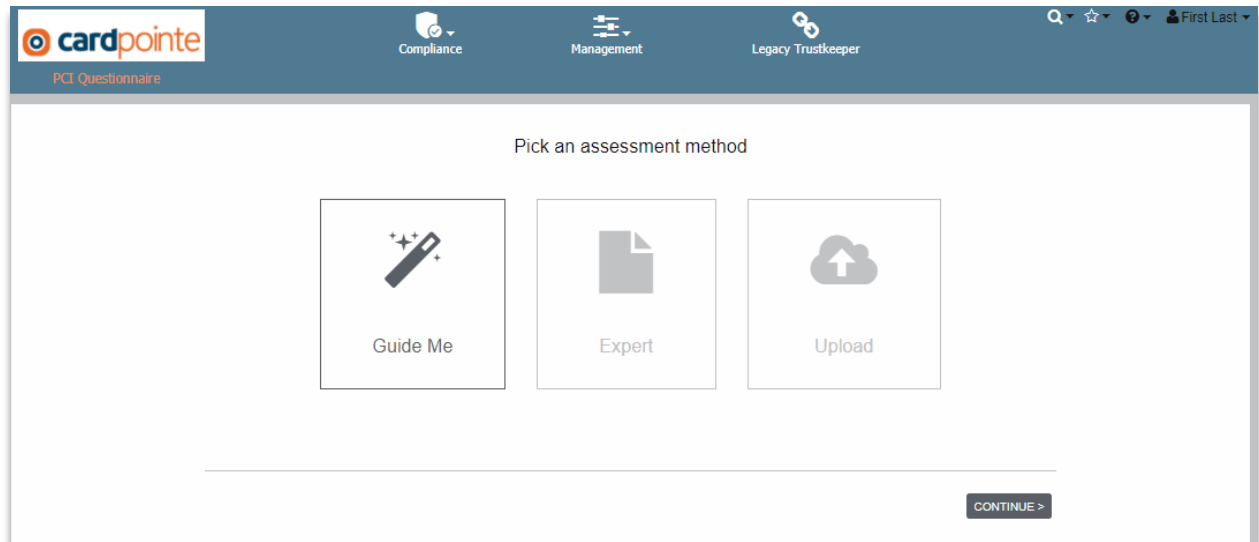


Using CardConnect's Bolt P2PE devices comes with a number of advantages, but one of the most important is reducing your PCI SAQ, or Self-Assessment Questionnaire. Keep reading to learn how you can access the SAQ P2PE, reducing the questionnaire to 33 questions!

First, log in to CardPointe, and select **My Account** and the **Accounts** tab. You should see a yellow alert box, and then click Learn how to get compliant.



Select **Guide Me** to be taken through the PCI Wizard



Select how you are accepting credit cards from your customers.

The screenshot shows the Cardpointe PCI Questionnaire interface. The top navigation bar includes the Cardpointe logo, 'PCI Questionnaire', and menu items for 'Compliance', 'Management', and 'Legacy Trustkeeper'. A user profile 'First Last' is visible in the top right. On the left, a progress bar shows 'PCI Questionnaire' at 15% completion. A sidebar lists five steps: 1. PCI Profile, 2. Company Profile, 3. Wizard, 4. Questionnaire, and 5. Confirmation. The main content area is titled 'What Are The Ways You Accept Credit Card Payments' and asks 'How do you accept credit cards? Select all that apply.' Three options are listed: '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 (MOTO).', and 'My business has a website where payments with a credit card are made online.' At the bottom, there are buttons for 'SAVE & EXIT', 'BACK', 'NEXT', 'CANCEL', an 'Auto Advance' toggle, and a 'Help' icon.

Advise if you are storing credit card data in any format.

The screenshot shows the Cardpointe PCI Questionnaire interface. The top navigation bar includes the Cardpointe logo, 'PCI Questionnaire', and menu items for 'Compliance', 'Management', and 'Legacy Trustkeeper'. A user profile 'First Last' is visible in the top right. On the left, a progress bar shows 'PCI Questionnaire' at 15% completion. A sidebar lists five steps: 1. PCI Profile, 2. Company Profile, 3. Wizard, 4. Questionnaire, and 5. Confirmation. The main content area is titled 'Credit Card Data Storage' and asks 'Does your business store any sensitive credit card data electronically?' Four options are listed: 'Yes, I have a payment application or device that stores credit card data.', 'Yes, I store credit card data in a computer.', 'Yes, I receive credit card data from a third-party in electronic format.', 'Yes, I store credit card data in some other way.', and 'None of the above - I never store credit card data.' (checked). At the bottom, there are buttons for 'SAVE & EXIT', 'BACK', 'NEXT', 'CANCEL', an 'Auto Advance' toggle, and a 'Help' icon.

Search for **CardConnect, LLC CardSecure P2PE**. Select version **1.1** and click **Add**

cardpointe
PCI Questionnaire

Compliance Management Legacy Trustkeeper

PCI Questionnaire 22%

1 PCI Profile
Products

2 Company Profile

3 Wizard

4 Questionnaire

5 Confirmation

Payment Products

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, over the phone, or through mail order.

Device	Version	Type	Risk	P2PE	Action
CardConnect, LLC CardSecure P2PE	1.1	Payment Application		✓	

Add

Existing Device No match, add new

cardconnect LOOKUP

- CardConnect, LLC CardSecure P2PE
- CardConnect, LLC CardSecure P2PE
- Princeton Payment Solutions LLC CardConnect
- Princeton Payment Solutions LLC CardConnect/CardSecure
- Titan Tech Group Israel LTD Credit Card Connect
- S1 Corporation PosConnect
- SalesPad, LLC, SalesPad CardControl

1.1

ADD

SAVE & EXIT BACK NEXT CANCEL Auto Advance Help

Select if you are using any other additional services for processing cards.

cardpointe
PCI Questionnaire

Compliance Management Legacy Trustkeeper

PCI Questionnaire 22%

1 PCI Profile
Products

2 Company Profile

3 Wizard

4 Questionnaire

5 Confirmation

Let's Check for Other Payment Products

Other than PCI-certified P2PE solutions, do you use any other types of products in your business?

Yes - I use other payment product types

No - I only use PCI-certified P2PE Solutions(s) for all payments

I don't know

SAVE & EXIT BACK NEXT CANCEL Auto Advance Help

Your PCI Profile will summarize your answers thus far. Click **Next**

cardpointe
PCI Questionnaire

Compliance Management Legacy Trustkeeper

PCI Questionnaire 28%

1 PCI Profile
PCI Profile Summary
2 Company Profile
3 Wizard
4 Questionnaire
5 Confirmation

PCI Profile Summary

Here is what we have covered so far regarding your PCI compliance profile. These will be used to help determine the relevant PCI requirements for your business type.

Acceptance Channels	Description
In-Person Mail / Telephone Website	You are using a certified PCI-listed point-to-point-encryption solution for all credit card payments
Payment Products P2PE Solution Others	On File CardConnect, LLC CardSecure P2PE (1.1) @
Compliance Requirement Annual Questionnaire Quarterly External Scan Quarterly Scan Setup Attestation	Included Tools Self Assessment Questionnaire "P2PE-HW" The PCI Wizard guides you through the self-assessment process Credit card security policies for your business Security Awareness Education for you and your employees (up to 10) The Trusted Commerce Seal for web sites

Merchant Type: P2PE

What's next Step-by-step guidance through the remaining questions. We will cover all the necessary information needed to complete your certification.

SAVE & EXIT BACK NEXT CHANGE PCI PROFILE CHANGE ASSESSMENT METHOD Help

Complete your **Company Profile**

cardpointe
PCI Questionnaire

Compliance Management Legacy Trustkeeper

PCI Questionnaire 41%

1 PCI Profile
2 Company Profile
Company Profile
Contact Details
Account Details
Status Reporting
Qualified Integrator/Reseller
3 Wizard
4 Questionnaire
5 Confirmation

Company Profile

General Info

Company: Test Account_RM_2
Industry: Other
Primary Contact: First Last[CardPointeTestM...
Secondary Contact: Please Select...
Mailing Address:
City:
Country: United States of America
State/Province: Alabama
ZIP/Postal Code:

Additional Info

Service Providers*
Does your company share cardholder data with any third-party service providers (for example, Qualified Integrator & Resellers (QIR), gateways, payment processors, payment service providers (PSP), web-hosting companies, airline booking agents, loyalty program agents, etc.)?
 Yes No

Multiple Acquirer*
Does your company have a relationship with more than one acquirer (e.g. merchant services provider, bank, etc.)?
 Yes No

Payment Card Activity*
Generally, how does your business store, process and/or transmit cardholder data (limit to 1000 characters)?

Environment Under Assessment*
Briefly describe the environment and/or systems covered by this assessment (limit to 1000 characters).

SAVE & EXIT BACK NEXT Help

The **Wizard** will walk you through and take you directly to **PCI SAQ P2PE 3.2.1 v1.0**

The screenshot shows the Cardpointe PCI Questionnaire Wizard interface. At the top, the Cardpointe logo is on the left, and navigation links for Compliance, Management, and Legacy Trustkeeper are on the right. A search icon and a user profile icon labeled 'First Last' are also present. Below the header, a progress bar indicates 'PCI Questionnaire' is 56% complete. A sidebar on the left lists the steps: 1. PCI Profile, 2. Company Profile, 3. Wizard (highlighted), 4. Questionnaire, and 5. Confirmation. Under step 3, 'Physical Security Security Policies' is listed. The main content area is titled 'Paper Documents with Credit Card Data' and contains a question: 'Does your business have or receive any paper documents containing full credit card numbers (see help for examples)?'. Below the question are two radio button options: 'Yes' and 'No'. At the bottom of the main area, there are buttons for 'SAVE & EXIT', 'BACK', 'NEXT', a toggle for 'Auto Advance' (which is turned on), and a 'Help' icon. A vertical button on the right side of the main area is labeled 'PCI Profile Summary'.