

User Guide for the Merchant Portal

**COMPLY WITH PCI DSS 4.0.1 EASILY AND
SECURELY**



KEY FEATURES AND BENEFITS OF THE PLATFORM

Before you begin, learn about the main advantages offered by our certification portal:

- Full compliance with PCI DSS 4.0.1, ensuring the protection of card data.
- Flexible process: you can start your certification and resume it at a later date without losing the progress made
- Designed for travel agencies, complying with IATA requirements.
- Intelligent chatbot that accompanies you step by step, resolving doubts instantly.
- Clear and explanatory information at every step, with a useful glossary always available.
- Modern, user-friendly and intuitive UI/UX.
- Visual control panel with the current status of the process and pending sections.
- All in one platform: avoid jumping between systems or emails to advance your certification.
- Automatic documentation: instantly generate and download all certificates and reports upon completion.
- Intelligent forms that reuse your information so you don't have to repeat data.
- Automatic English translation of your answers, aligned with international standards.
- Multilingual support, ideal for users from different regions.

LIMITATIONS TO BE TAKEN INTO ACCOUNT

To provide you with a smooth and frictionless experience, our platform is designed to work without the need to create user accounts. However, this comes with some important considerations:

The entire process must be completed **using the same browser and device from which you made the payment.** Otherwise, you will lose your progress:

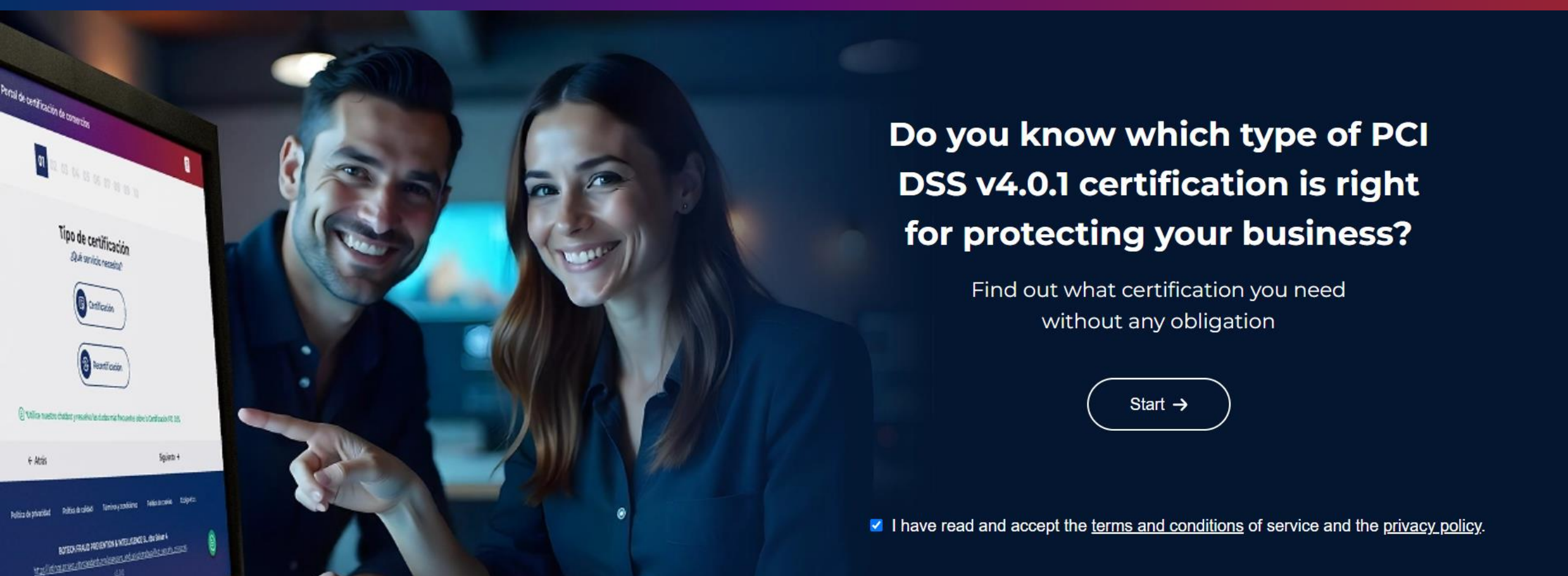
- **It is not possible to continue the flow from a different device or browser.**
- For this reason, **you will not be able to share your progress with someone else** to continue for you.

Tracking is done through **browser cookies:**

- If you delete your cookies or change your browser, **you will lose the progress you have made.**

Thanks to this architecture, there is no need to register or memorize passwords, making the process faster and easier.

PCI DSS 4.0.1 PCI DSS 4.0.1 CERTIFICATION PORTAL FULL FLOW



Do you know which type of PCI DSS v4.0.1 certification is right for protecting your business?

Find out what certification you need without any obligation

Start →

☒ I have read and accept the [terms and conditions](#) of service and the [privacy policy](#).

INITIAL ACCESS

The user **does not need an account or login**.

USE OF COOKIES

All tracking is handled by **browser cookies**.

- ⚠️ **You should not delete cookies from the portal domain**, or you will lose progress.

START

By accepting terms and conditions and clicking "**Start**", the flow starts.



1. CONTACT INFORMATION

- Name and surname
- Corporate email
- Country
- Phone

01

02

03

04

05

Contact information

Enter your name, corporate email and phone number

Name and surname *

Enter your first and last name

Corporate email *

Enter your company email address

Country *

Select your country




Teléfono *



✓ +1 (XXX) XXXX-XXXX

2. TYPE OF ENTITY


- **Travel agency (IATA)** → flow continues.
- **Service provider** → the flow stops. A team member will contact you directly.


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0102030405

Type of entity

What type of entity does it belong to?

 Travel agency (IATA)


 Service Provider

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TYPE OF PROCESS TO BE CARRIED OUT


- **PCI DSS Certification** (First time)
- **PCI DSS Re-Certification** (already has previous AOCs)


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01 02 03 04 05

Type of process to be performed

Select the option that corresponds to your case

 **PCI DSS Certification**
(First time)

 **PCI DSS Re-Certification**
(I already have AOCs from previous years)

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4. SAQ ASSIGNMENT OR CONFIRMATION

Type of SAQ:

- SAQ B
- SAQ A
- SAQ C-VT

01 02 03 04 05

SAQ assignment or confirmation

Select whether you need to assign a new SAQ or confirm the current one.

To correctly assign or validate your SAQ type, select the collection method(s) used by your agency. If you have doubts about the methods, you can consult a detailed description below.



Card present - SAQ B

(I use physical pinpads)



Use of GDS - SAQ A

(Sabre, Amadeus, Galileo, etc.)



Use of virtual payment terminal - SAQ C-VT



Card present
SAQ B



Use of GDS
SAQ A



Virtual Payment Terminal
SAQ C-VT

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5. SERVICE DATA

A summary is shown with:

- Type of entity
- Type of process
- Type of SAQ
- Country
- Final price
- Pay button that redirects to secure checkout



01 02 03 04 05

Service data

Below you will find the details of the selected service and its price.

TYPE OF ENTITY	Travel Agency
PROCESS TYPE	PCI DSS certification v4.0.1
TYPE OF SAQ	SAQ B
COUNTRY	 United States
PRICE	\$250.00 USD (VAT included)

PAY NOW

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6. PAYMENT OF THE CHOSEN SERVICE

If the payment is successful, redirect to:
<https://en.comercios.botech.info/after-checkout/>

If everything is correct → "Start" button

If there is an error → error message is displayed

⚠ IMPORTANT: If you close your browser or leave the page after making the payment, **you can resume the process** by going directly to the following link:
[👉 https://en.comercios.botech.info/after-checkout/](https://en.comercios.botech.info/after-checkout/)

Pay BOTECH FRAUD PREVENTION & INTELLIGENCE USA

\$250.00

PCI DSS Certification v4.0.1 - SAQ B

\$250.00

Subtotal

\$250.00

Add promotion code

Total due

\$250.00

amazon pay

Or

Contact information

email@example.com

(201) 555-0123

Payment method

☐ Card

☐ Klarna

☐ Cash App Pay

Pay

An error has occurred

To access this page, **you must have successfully completed the payment.** If you have already paid, please contact us at info@botech.info to resolve the error.

← BACK TO HOME

Successful payment

Your payment has been successfully completed! You can now begin the **PCI DSS certification v4.0.1** process for your **SAQ B**.

START →



7. INSTRUCTIONS

Page with clear explanations on how to complete the self-assessment.

✦ **Read this section carefully before proceeding.** Following the instructions carefully will prevent problems during the certification process and help you complete it smoothly.

Instructions:

The following explains the steps to follow and tools available to help you correctly solve the questions covering the applicable PCI DSS v4.0.1 requirements of the SAQ (Self Assessment Questionnaire) “**Type SAQ B**”.

Responses

You will only have 3 options to respond:

1. **Implemented:** The planned tests have been performed and all elements of the requirement have been fulfilled as established.
2. **Not implemented:** Some or all elements of the requirement have not been met, or are in the process of being implemented, or require further testing before the merchant can confirm that they have been implemented. **If a requirement falls into this category, it will not be allowed to obtain certification, as it will not be a valid response.**
3. **Not applicable:** The requirement does not apply to the merchant's environment.

Description

The description is a text that explains in detail the questionnaire question and how to implement the requirements of the PCI DSS standard, this wording is suitable for all users to have a complete understanding of each question.

Justification table

When answering "Not applicable" you must include a justification as to why this question should be excluded from our certification. (The answer will be taken as valid and by writing the justification you can save and continue with the other questions).

Justify why it is not applicable *

8. CONTACT INFORMATION

- Company name
- DBA (trade name)
- Mailing address
- Web site
- Contact name
- Position in the company
- Contact telephone number
- Contact Email

Contact Information

Provide your company's main data

* Indicates that the field is mandatory

Company name *

Enter your company name

Company contact name *

Enter the name of the main contact

DBA (acting commercially as)

Enter the trade name

Company contact position *

Enter the main contact's title

Company's mailing address *

Enter your company's mailing address

Contact telephone number *

 +1 (XXX) XXXX-XXXX

Main company website *


Enter your company website

Contact e-mail address *

Enter the corporate email address

9. SIGNATURE OF THE EVALUATED ENTITY

Digital signature drawn on the screen to confirm the data entered.

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Signature of the Evaluated Entity

Draw your signature to confirm the information provided

Please sign below as the person responsible for the certification process. As this is a self-assessment, you certify the truthfulness of the answers provided.

UndoDelete

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10. EXECUTIVE SUMMARY

Merchant payment channels:

- Mail order/phone order (MOTO)
- E-commerce
- Present card
- Other channel

Two key buttons already appear here to facilitate your experience:

- **Glossary button:** gives you immediate access to a list of definitions of the terms used in the self-assessment questions.
- **Save button:** allows you to save the current URL of the form so that you can retrieve it later from anywhere on the platform.

AZ GLOSSARY

SAVE



AZ GLOSSARY

SAVE

Part 2. Executive Summary

Part 2a. Merchant Payment Channels (select all that apply):

Indicate all payment channels used by the company that are included in this Assessment.



Order by mail / by phone (MOTO)



E-commerce



Present Card




Other pay channel not included

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11. DESCRIPTION OF THE PAYMENT CARD FUNCTION

Explanation of the use of cards in each selected channel.

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Part 2b. Description of the Payment Card Function

For each payment channel included in this Assessment selected in Part 2a above, describe how the merchant stores, processes and/or transmits cardholder data.

Order by mail / by phone (MOTO)

How does the Company Store, Process and/or Transmit Cardholder Data? *

E-commerce

How does the Company Store, Process and/or Transmit Cardholder Data? *

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12. DESCRIPTION OF THE PAYMENT CARD ENVIRONMENT

Requests:

- Payment card environment details
- If it includes network segmentation

Part 2c. Description of the Payment Card Environment

Provide a **high-level** description of the environment covered by this assessment.

For example:

- Connections to and from the cardholder data environment (CDE).
- Critical system components within the CDE, such as POI devices, databases, web servers, etc., and any other required paid components, as appropriate.
- System components that could affect the security of cardholder data.

Describe the Payment Card Environment *

Indicate whether the environment includes segmentation to reduce the scope of the assessment (See the "Segmentation" section of the PCI DSS for guidance on segmentation).



Yes



No

Add all facilities included in the scope of certification.


Add all facilities included in the scope of certification.

[illegible]

14. PRODUCTS AND SOLUTIONS VALIDATED BY PCI SSC

Do you use PCI SSC validated products?

- If so, they must be registered.

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Part 2e. PCI SSC Validated Products and Solutions

Does the merchant use any items identified in any of the PCI SSC Validated Products and Solutions Lists?

☒ Yes

☐ No

Provide the following information about each item the merchant uses from the PCI SSC Validated Products and Solutions Lists:

Product or Solution Name Validated by PCI SSC	Product or Solution Version	PCI SSC standard according to which the product or solution was validated	PCI SSC List Reference Number	List Expiration Date (YYYY-MM-DD)
E.g. Payment System X	E.g. 2.0.1	E.g. PCI DSS v3.2.1	E.g. PCI-XXXX-YYY	E.g. 2025-01-31
E.g. Payment System X	E.g. 2.0.1	E.g. PCI DSS v3.2.1	E.g. PCI-XXXX-YYY	E.g. 2025-01-31
E.g. Payment System X	E.g. 2.0.1	E.g. PCI DSS v3.2.1	E.g. PCI-XXXX-YYY	E.g. 2025-01-31
E.g. Payment System X	E.g. 2.0.1	E.g. PCI DSS v3.2.1	E.g. PCI-XXXX-YYY	E.g. 2025-01-31

[A-Z GLOSSARY](#)
[SAVE](#)

15. EXTERNAL SERVICE PROVIDERS

Do you use third-party services?

- If so, you must add the suppliers involved.

Part 2f. External Service Providers

Does the merchant have relationships with one or more external service providers that:

Store, process or transmit cardholder data on behalf of the merchant (e.g., payment gateways, payment processors, payment service providers (PSPs) and external storage).

☒ Yes

☐ No

They manage the system components included in the scope of the merchant's PCI DSS assessment, for example, through network security monitoring services, anti-malware services, security incident and event management (SIEM), contact and call centers, web hosting services, and cloud IaaS, PaaS, SaaS and FaaS providers.

☒ Yes

☐ No

They could affect the security of the merchant's CDE (e.g., vendors providing support via remote access, and/or custom software developers).


☒ Yes

☐ No

16. ELIGIBILITY TO FILL THE SAQ

Selection of the reason for being considered eligible for this type of SAQ.

The available options may vary according to the type of SAQ selected.

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Part 2h. Eligibility to complete the SAQ B


Merchant certifies eligibility to complete this Self-Assessment Questionnaire for this payment channel because:

- ☐ The merchant uses only a printing machine and/or uses only stand-alone dial-up terminals (connected through a telephone line to the merchant's processor) to obtain payment card information from customers.
- ☐ Stand-alone dial-up terminals are not connected to any other system within the merchant's environment.
- ☐ The independent dial-up terminals are not connected to the Internet.
- ☐ The merchant does not store account data in electronic format.
- ☐ Any account data that the merchant may retain is on paper (e.g., printed reports or receipts), and these documents are not received electronically.

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17. DATE OF COMPLETION OF THE SELF-ASSESSMENT

Select if any SAQ requirements could not be met due to legal restrictions.

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Date of completion of the self-assessment

Were there any SAQ requirements that could not be met due to legal restrictions?

☒ Yes

☐ No

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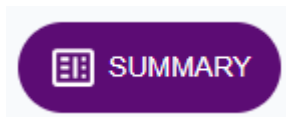
18. SAQ Questions


Based on the type of SAQ chosen.

- Each question allows the following answers:
 - **Implemented**
 - **Not implemented**
 - **Not applicable**
- If you answer "Not applicable", you must justify it.

A key button appears here to show the status of the questions and facilitate navigation between them and a progress bar to show the percentage of completed questions:

- **Summary button:** displays the general status of the answers, showing at a glance the unanswered questions and the answers to the rest. It makes it easy to navigate to any question with a click on it.



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0% Completado

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SUMMARY

SAVE

Question 1 – Requirement (3.1.1)

All security policies and operating procedures identified in Requirement 3 are:

- Documented.
- Updated.
- In use.
- Known to all parties involved.


✓ Implemented

✗ Not implemented

⊘ Not applicable

RECOGNITION OF THE MERCHANT

Final confirmation of the data and of the self-assessment performed.

 GLOSSARY

 SAVE

Part 3a. Merchant Acknowledgement

The signatory confirms:

Select all that apply:

- ☐ The PCI DSS B Self-Assessment Questionnaire, Version 4.0.1, has been completed in accordance with the instructions contained therein.
- ☐ All information contained in the SAQ self-assessment questionnaire and in this statement accurately represent the results of the dealer's assessment in all material respects.
- ☐ PCI DSS controls will be maintained at all times, as appropriate to the merchant's environment.

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20. ATTENTION! FINAL REVIEW

Final message: "SAQ successfully completed".


Before proceeding, please **verify that all information entered is correct**. Once the documentation and certificate have been generated, **it will not be possible to modify any answer or go back in the process**.

Available options:

- **Review information** → return to post-payment startup to verify each response.
- **Generate documentation** → download the documents and certificate

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 **Attention!**

You have successfully completed the Self Assessment Questionnaire (SAQ) solution, then you will be able to generate the certification documents:

- Self Assessment Questionnaire (SAQ).
- Attestation of Compliance (AOC).
- PCI DSS Compliance Diploma.

We ask that before selecting "**Generate Documentation**" you double check your answers and information provided, as once you have selected this option you will not be able to modify the information in your documents.

[Review Information](#) [Generate Documentation](#)


21. CONGRATULATIONS!

After the translation is completed, a new page with the Congratulations! message loads where you will have access to the three key certification documents.


This page contains three buttons:

- Self Assessment Questionnaire (SAQ)
- Attestation of Compliance (AOC)
- Compliance Diploma

From this section you will be able to download the final certification documents and close the process successfully.

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Pick up where I left off →

 **Congratulations!**

You have successfully completed the SAQ. You can now download the three certification documents:

- Self Assessment Questionnaire (SAQ).
- Attestation of Compliance (AOC) - This is the document that is shared with IATA.
- PCI DSS Compliance Diploma.

Self Assessment Questionnaire
↓ Download

Attestation of Compliance
↓ Download

Compliance Diploma
↓ Download



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