

# Merchant Portal Quick start user guide

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# Product overview

Merchant Portal is a useful online data management tool. It helps you find the important information you need to better understand your customers and make informed decisions about your business. The user-friendly dashboard, reports, transaction finder, and self-service tools can help you manage daily tasks more efficiently. And you can access the portal anywhere, at any time, on any compatible device (laptop and desktop).

## Main specifications and features

<b>Dashboard overview</b>	Displays a clear view of business performance.
<b>Location selector</b>	Pinpoints a specific store or business.
<b>Disputes management tool</b>	Enables fast resolution of chargebacks.
<b>Reconciliation reports</b>	Provides simple, fast transaction reconciliation.
<b>Custom report builder<sup>^*</sup></b>	Uses filters to create customised reports of your transactional activity which can be scheduled and shared.
<b>Analytics and local business benchmarking<sup>*</sup></b>	Transaction and customer data helps you understand more about your customers and local competitors—helping you make key business decisions.
<b>Monthly online invoices</b>	Offers access to your online invoices/statements.
<b>Account management: User management</b>	Allows self-service control of employee access to the portal.
<b>Transaction finder<sup>^*</sup></b>	Assists troubleshooting by quickly locating transactional activity.
<b>PCI DSS compliant</b>	Protects your customer data.
<b>Tokenized card data</b>	Encrypts all sensitive information to reduce data storage risk.
<b>Help Centre</b>	Provides important information and answers to your questions.

<sup>^</sup>only available on Merchant Portal Standard

<sup>\*</sup>only available on Merchant Portal Pro

## Key benefits

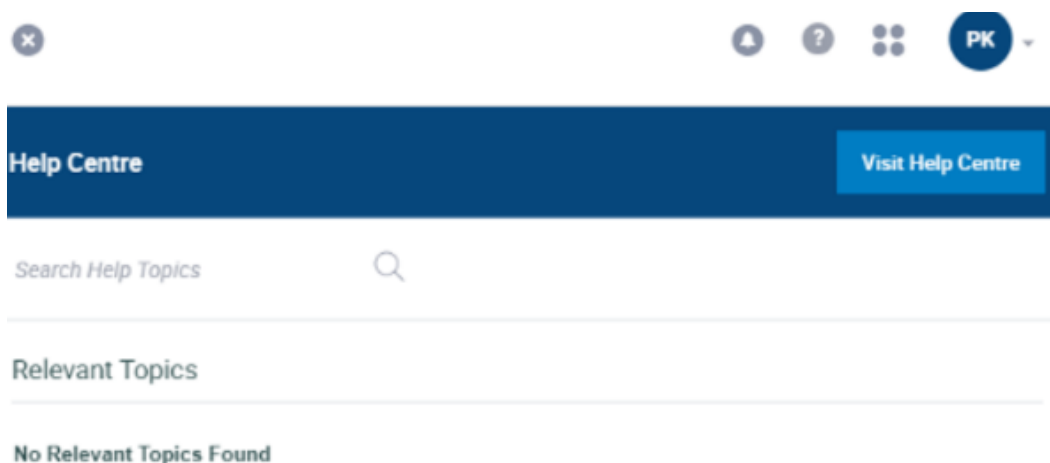
- **Reduce costs and losses** by getting fast resolution of chargebacks with the online dispute management tool. You can view, monitor, and respond to dispute cases and upload supporting documents quickly to avoid missing deadlines. Our analytics tools can help reduce operational costs—it can monitor your stock levels and work out the number of staff you need.
- **Save time** and gain greater insight into your business with easy-to-use reports and visuals that give you a summary of all your payment activity. Our customisable filters and report scheduler allow you to plan and organise the data in a way that suits your business needs.
- **Stay up-to-date** with the latest activity on your account with dispute alerts that give you quick updates without having to log in to the system.
- **Manage your business with ease** through our self-service data management platform. Whether you're contacting customer service, creating additional users, or setting up new locations, you can view activity online from anywhere, at any time, on any compatible device.

## Getting started

This guide provides a brief introduction to the Merchant Portal and it will help you get started once you have your login credentials. For detailed instructions on various functionalities within the portal, please refer to our online Help Centre—you can access this by clicking the question mark (?) on the top right corner of the menu bar of the Merchant Portal window.



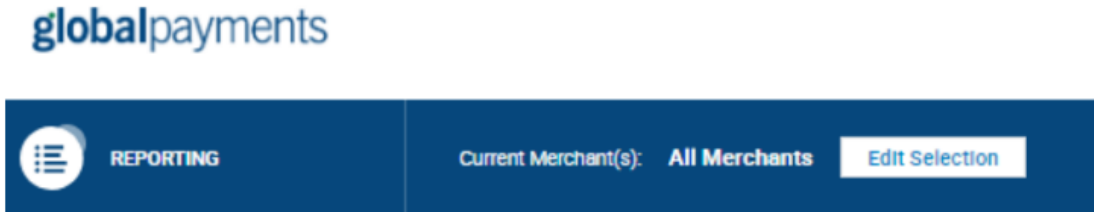
After clicking on the question mark symbol, you'll see the following screen appear on the right-hand side panel with the link to the Help Centre.



## Logging into Merchant Portal

### What you'll need to log in:

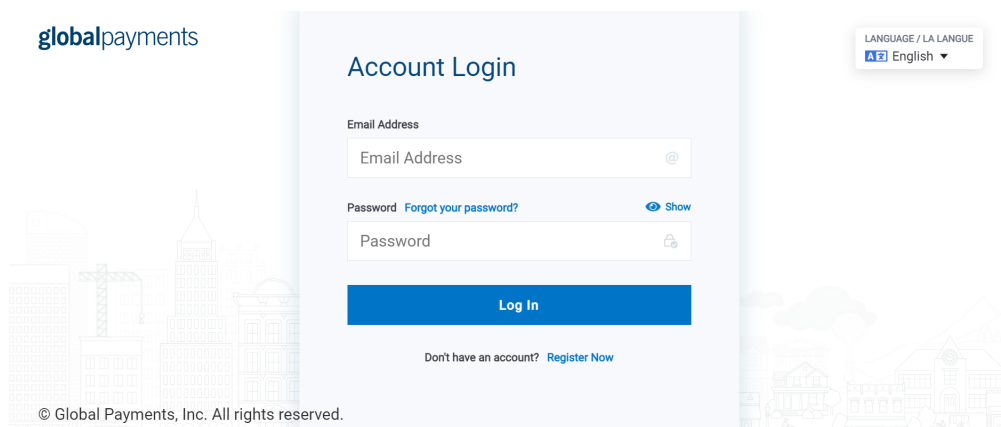
- Your login details: email address and password.
- Merchant number, or hierarchy details, so that you can filter your transactional activity. There's a merchant selector that can be used to drill down by individual merchant number, or multiple merchant numbers, which can be found at the top of your screen, as shown below.



It's useful to add the Merchant Portal URL ([reporting.globalpay.com](https://reporting.globalpay.com)) to your favourites, or bookmark it, so you have the link readily available.

## Login page

To log into Merchant Portal, enter [reporting.globalpay.com](https://reporting.globalpay.com) into the address bar of your browser, or select the saved page from your favourites/bookmarks. You'll see a screen, as below. Enter your email address and password, and click **Log in**.



## Merchant Portal home page

Once you're logged in, you'll see your Dashboard, as shown below:

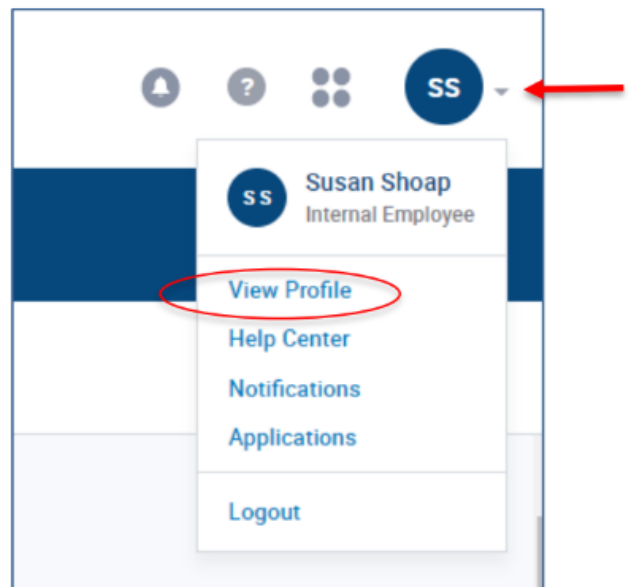


All of the pages in Merchant Portal have a menu bar on the left-hand side. The options available within this menu bar will differ for each user based on their profile access rights.

## User preference settings

Merchant Portal allows you to change some settings to your personal preference, such as language, time format, and date format. To change your preferences:

1. Log in to Merchant Portal.
2. Click the drop-down arrow next to your profile icon in the top right corner.
3. Select **View Profile**.



4. The User Profile page displays and you'll see the user preferences at the bottom of the page. To change your preference settings:

- Language** – click the drop-down arrow in the Language selection box and select your preferred language.
- Time format** – select your preferred time display from the two options available.
- Date format** – select your preferred date format display from the two options available.

5. Then click the **Save Preferences** button to save your changes.

**PREFERENCES**

<p>Language</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> <span style="margin-right: 5px;">English (US)</span> <span style="font-size: 0.8em;">▼</span> </div>	<p>Time Format</p> <p><input checked="" type="radio"/> Show 24-hour clock (16:30)</p> <p><input type="radio"/> Show AM/PM (4:30pm)</p>	<p>Date Format</p> <p><input checked="" type="radio"/> MM/DD/YYYY (07/15/2017)</p> <p><input type="radio"/> DD/MM/YYYY (15/07/2017)</p>
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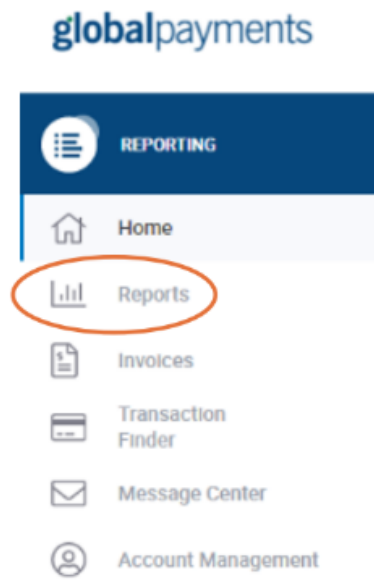
Save Preferences

## Reports

In the Reports section, you can:

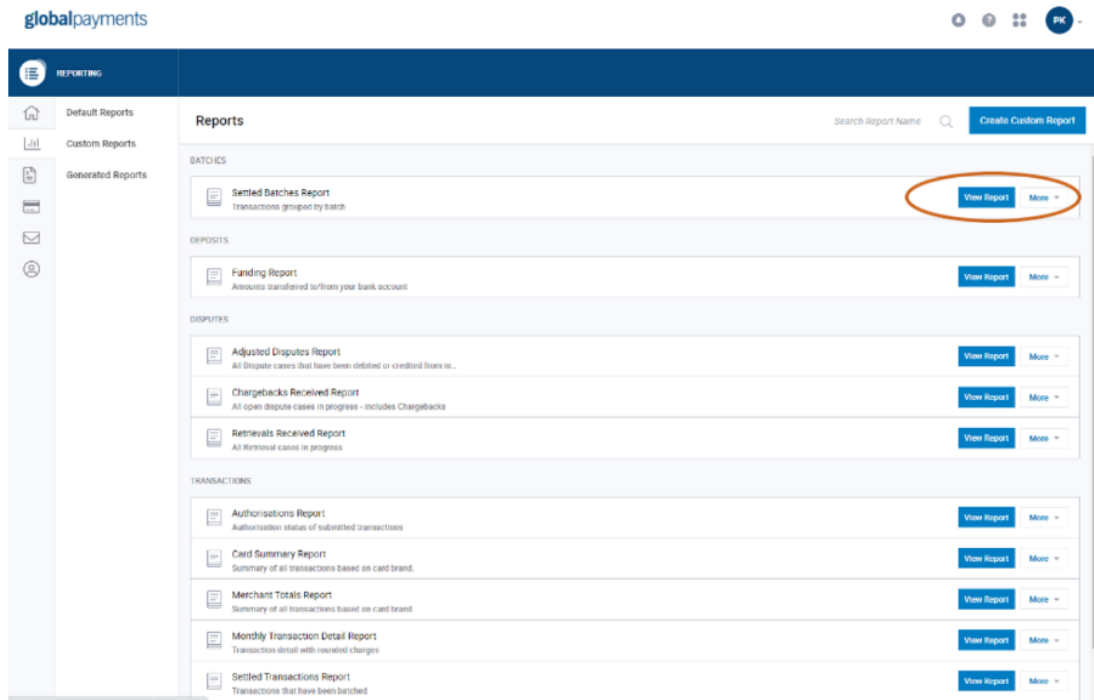
- Generate** reports using a wide range of search and filter options.
- Customise** your reports by clicking on the 'create' custom report option.
- Export** reports.

To get started, click on **Reports** on the left menu bar.



## Reports home page

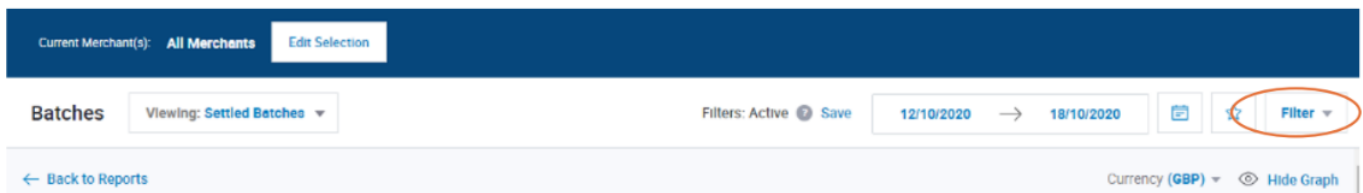
The initial reports page has the reports broken out by categories so you can quickly identify how you'd like to view your transactional activity:



To select a report, click on the **View Report** button against the report you'd like to view, as shown above. Your chosen report will then open in a new window.

## Report filters

To narrow your search results, you can use the filter button at the top right of the window. Once the filters are entered, click on **Apply** to generate the report.



If it's a regular report you'll use and want to see your applied filters, you can save this filter for future use.



## Customising reports using column manager

You can customise what fields are shown on the report by using column manager. Here, you can **add** and/or **remove** fields that you don't need to see the data for. Customising reports to suit your needs helps you see the most important information you need at any given time.

Available Columns	Active Columns	8 Selected
Search Available Columns <input type="text"/>	Search Active Columns <input type="text"/>	
Add All	Remove All	
Sales Amount   +	Merchant Number   X	
DBA Name ?   +	Merchant Name   X	
Refunds   +	Terminal Number   X	
MCC ?   +	Batch Number   X	
Cancel		Apply

## Exporting reports

Merchant Portal allows you to export and save reports as a CSV, TXT, or PDF file, you can then:

1. **Save** the report and refer back to it as and when you need to.
2. **Analyse** the data to give you an in-depth understanding of how your business is doing.
3. **Transfer** the data to other applications (like accounting packages).

## How to export reports

Once you've generated your report and are happy with the data shown on the screen, you may want to export this – to do this, click on the **Export** button. You'll then be able to select what file format you'd like to export the report in, and whether you'd like to export the **visible columns** only or **all columns**.

If your export contains large amounts of records and data, the system will provide you with a notification, as below. And when the report is ready and available for you to download, it will appear in the Generated Reports tab.

The screenshot shows the 'Export Report' dialog box. At the top, there are 'Columns' and 'Export' buttons. Below is a dark blue header 'Export Report'. The main content area asks 'What kind of file format do you want?' with buttons for 'CSV', 'PDF', and 'TXT'. It then asks 'What do you want to export?' with buttons for 'Visible Columns' and 'All Columns'. A text field for 'Name of file:' contains 'Settled Batches\_2020-10-13T12:29:30.005Z'. At the bottom, there are 'Cancel' and 'Export' buttons. The 'Export' button is circled in orange.

This screenshot is similar to the previous one but includes a notification banner at the top. The banner has a purple background and a white icon of a clock, with the text: 'Due to the large number of records being exported, the system will need more time than usual. You will find this export in the Reports Section under Generated Reports when it is ready to download.' Below the banner, the rest of the dialog box is identical to the previous screenshot.

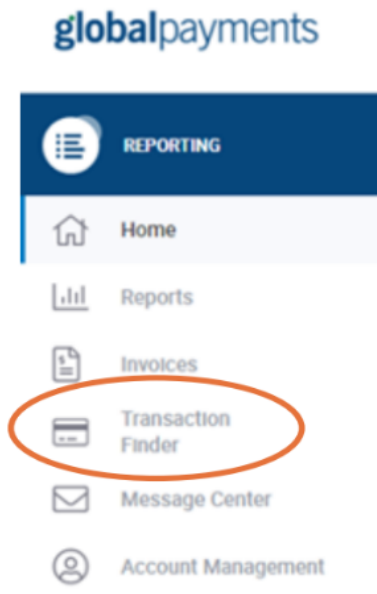
## How to access generated reports

Once your report is ready, it will be saved under the **Generated Reports** tab within the Reports section of Merchant Portal, ready for you to download.

The screenshot shows the 'globalpayments' Merchant Portal. The top navigation bar includes the logo and user profile 'PK'. The main header is 'REPORTING' with 'Current Merchant(s): 356 Selected' and an 'Edit Selection' button. The left sidebar has 'Default Reports', 'Custom Reports', and 'Generated Reports' (selected). The main content area is titled 'Reports' and has a search bar and a 'Create Custom Report' button. Under 'GENERATED IN THE LAST 7 DAYS', there are two report entries: 'Settled Transactions - Schedule.csv' (marked 'NEW') generated on 19/10/2020, and another generated on 18/10/2020. Each entry has a 'Download' button.

# How to troubleshoot transactions

1. On the left menu bar, click **Transaction Finder**.



2. Select one or more merchant numbers using the **Merchant Number Selector**.

 A screenshot of the 'Merchant Number Selector' interface in the globalpayments application. The top bar shows 'REPORTING' and 'Current Merchant(s): All Merchants' with an 'Edit Selection' button. Below this, the 'Merchant Number Selector' section has a 'Clear All' button. A sub-header reads: 'Select one or multiple Chain or Merchant Number and click select below. You can add as many as you want.' There are seven dropdown menus labeled 'CORP', 'REGION', 'PRINCIPAL', 'ASSOCIATE', 'CHAIN', and 'MERCHANT', all currently set to 'All'. A red 'X' icon is next to the 'MERCHANT' dropdown. Below the dropdowns is an '+ Add More' button.

3. Type in or select the transaction information in the search criteria fields:

 A screenshot of the 'Transaction Finder' search criteria fields. The top left shows 'Transactions' and 'Viewing: Transaction Finder'. On the top right, there are 'Filters: Active', 'Save', a star icon, and a 'Search' button. The search criteria are organized into several rows:
 

- 'Original Transaction Date' with a 'Last 7 Days' dropdown.
- 'Original Transaction Amount' with two input fields separated by 'TO'.
- 'Transaction Currency Code' with a dropdown menu.
- 'Transaction Type' with a 'Select Transaction Type' dropdown.
- 'Merchant Number' with an input field.
- 'Merchant Name' with an input field.
- 'Terminal Number' with an input field.
- 'Card Number (first 6 or last 4 digits)' with 'First 6' and 'Last 4' input fields.
- 'Card Brand' with a 'Select Card Brand' dropdown.

 A 'More' button is circled in orange at the bottom center of the search criteria section. At the very bottom, there is a 'Clear All Fields' link on the left and 'Cancel' and 'Search' buttons on the right.

4. For advanced search options, click on **More** as shown in the previous image and the following will be displayed.

The screenshot shows a 'Transactions' search interface. At the top, it says 'Viewing: Transaction Finder' and 'Filters: Active'. There are 'Save' and 'Search' buttons. The form is divided into several sections with various input fields and dropdown menus:

- Original Transaction Date:** A dropdown menu currently set to 'Last 7 Days'.
- Original Transaction Amount:** Two input fields for 'From' and 'To'.
- Transaction Currency Code:** A dropdown menu for 'Select Transaction Currency Code'.
- Transaction Type:** A dropdown menu for 'Select Transaction Type'.
- Merchant Number:** An input field.
- Merchant Name:** An input field.
- Terminal Number:** An input field.
- Card Number (first 6 or last 4 digits):** Two input fields for 'First 6' and 'Last 4'.
- Card Brand:** A dropdown menu for 'Select Card Brand'.
- Entry Mode:** A dropdown menu for 'Select Entry Mode'.
- Authorization Code:** An input field.
- Purchase ID:** An input field.
- Authorization Date:** A dropdown menu for 'Select Date(s)'. Below it is a 'Processing Date' dropdown for 'Select Date(s)'.
- Response Code:** A dropdown menu for 'Select Response Code'.
- Acquirer Reference Number (ARN):** An input field.
- Payment Amount:** Two input fields for 'From' and 'To'.
- Payment Reference Number:** An input field.
- Deposit Reference Number:** An input field.
- Original Transaction Reference Number:** An input field.
- Batch Control Number:** An input field.
- Chargeback Amount:** Two input fields for 'From' and 'To'.
- Status:** A dropdown menu for 'Select Status'.
- Settlement Date:** A dropdown menu for 'Select Date(s)'. Below it is a 'Settlement Currency' dropdown for 'Select Settlement Currency'.

At the bottom of the form, there are buttons for 'Clear All Fields', 'Cancel', and 'Search'. A 'More' button is also visible below the form.

5. Once you've entered your search criteria, click **Search** and below your search criteria, you'll see a summary of transactions matching the criteria you entered.

The screenshot shows the results of a search in the 'Transaction Finder'. At the top, there are input fields for 'First 6', 'Last 4', and 'Select Card Brand'. Below these is a 'More' button. The main content area has a 'Clear All Fields' link, 'Cancel', and 'Search' buttons. The currency is set to '(GBP)'. The interface shows 'Showing records 1-25 of 11826' and options for 'Columns' and 'Export'.

**Summary (GBP)**  
Total Amount: **4098578.03**

Merchant Number	Transaction Date	Original Transa...	Transaction Typ...	Card Brand	Authorization C...	Actions
15405332	01/11/2019 10:57 pm	11.40 GBP	Sale	VISA	024983493	Actions
15405332	01/12/2019 07:29 pm	18.75 GBP	Sale	MARQUE	024983493	Actions
15405332	01/12/2019 08:12 pm	5.80 GBP	Sale	VISA	024983493	Actions
15405332	01/12/2019 07:58 pm	47.70 GBP	Sale	MARQUE	024983493	Actions
15405332	01/11/2019 10:55 pm	12.75 GBP	Sale	MARQUE	024983493	Actions
15405332	01/12/2019 03:32 pm	32.40 GBP	Sale	VISA	024983493	Actions
15405332	01/12/2019 12:00 am	4.75 GBP	-	-	024983493	Actions
15405332	01/11/2019 05:50 pm	10.78 GBP	Sale	VISA	024983493	Actions
15405332	01/12/2019 12:00 am	4.75 GBP	-	-	024983493	Actions
15405332	01/08/2019 07:12 pm	19.40 GBP	Sale	MARQUE	024983493	Actions
15405332	01/08/2019 06:09 pm	3.37 GBP	Sale	VISA	024983493	Actions

At the bottom, there is a 'Show 25 per page' dropdown, 'Showing records 1-25 of 11826', and pagination controls: 'Prev', 'Page 1 of 474', and 'Next'.

6. You can then drill down into an individual transaction for additional details by clicking on **Actions**, as shown in the image above.

The screenshot displays the Global Payments Merchant Portal interface. On the left, there is a navigation menu with options like Home, Reports, Transaction Finder, and Account Management. The main area shows a 'Transactions' section with filters for Original Transaction Date (09/04/2018 - 09/30/2018) and Original Transaction Amount (70). Below this is a 'Transaction Finder' table with columns for Merchant Number, MSA Name, Transaction Date, Original Amount, Transaction Type, and Card Brand. A 'Show 4' button is visible below the table. On the right, a 'Transaction Finder Details' panel is open, showing a hierarchy (CORP 002 - Region 03 - Pin 001 - Associate 100 - Chain AAA) and various fields for transaction information, including MSA Name (TRAVELLOGE BATH), Transaction Type (Sale), Approved Code (18247 7881), Processing Date (09-05-2018), Settlement Amount (\$3.00), and Card Brand (MasterCard).

## User management

This area of Merchant Portal contains all the information to do with your account set-up, including:

- Users
- Locations
- Statements
- Documents
- Product offering

To manage internal or external user access for Merchant Portal, click **Users** as shown in the screenshot below. Here, you can create, edit, and deactivate users.

To create a new account for a user, click on the **Create New User** button, as shown in the screenshot below.

globalpayments

REPORTING Current Merchant(s) All Merchants Edit Selection

Users Documents Locations Product Offering

User Management Search... Filter Create New User

Users Showing records 1–25 of 340

First Name	Last Name	Email Address	Role	Last Login	Actions
CA	Test	test1627477932873@putsbox.com	Regional Product Manager	07/28/21	Actions
CA	Test	test1627478502755@putsbox.com	Worldwide Product Manager	07/28/21	Actions
CA	Test	test1627479356566@putsbox.com	Masterfile Analyst	07/28/21	Actions
CA	Test	test1627548004502@putsbox.com	Internal Employee	07/28/21	Actions
CA	Test	test16275485443101@putsbox.com	Regional Product Manager	07/28/21	Actions

Show 25 per page 1 to 25 of 340 Page 1 of 14

To modify a user's account permissions or data access, click on **Actions** > **Edit User**.

globalpayments

REPORTING Current Merchant(s) All Merchants Edit Selection

Users Documents Locations Product Offering

Create New User

← Back to User Management

User Information

FIRST NAME LAST NAME EMAIL ADDRESS

Jane Doe jdoe@example.com

Next

Select A Role

Select Data Access

User Summary

User Information None Entered

Role & Permissions Account Administrator

Data Access None Selected

Create User

The ability to edit user access will depend on your own account permissions.

You'll need to input the information required to set up the new user, as shown in the screenshots below.

The screenshot shows the 'Create New User' form in the Global Payments system. The 'Select A Role' step is highlighted with a red box. The 'AVAILABLE ROLES' list includes:

- Role: Account Administrator
- Account Administrator
- Account User
- Acquirer Administrator
- Acquirer User
- Customer Service
- Internal Employee

The 'Next' button is visible to the right of the role selection area. The 'User Summary' panel on the right shows 'User Information' (None Entered), 'Role & Permissions' (Account Administrator), and 'Data Access' (None Selected). The 'Create User' button is at the bottom right.

The screenshot shows the 'Create New User' form in the Global Payments system. The 'Select Data Access' step is highlighted with a red box. The 'Select Data Access' section includes a table with the following columns and values:

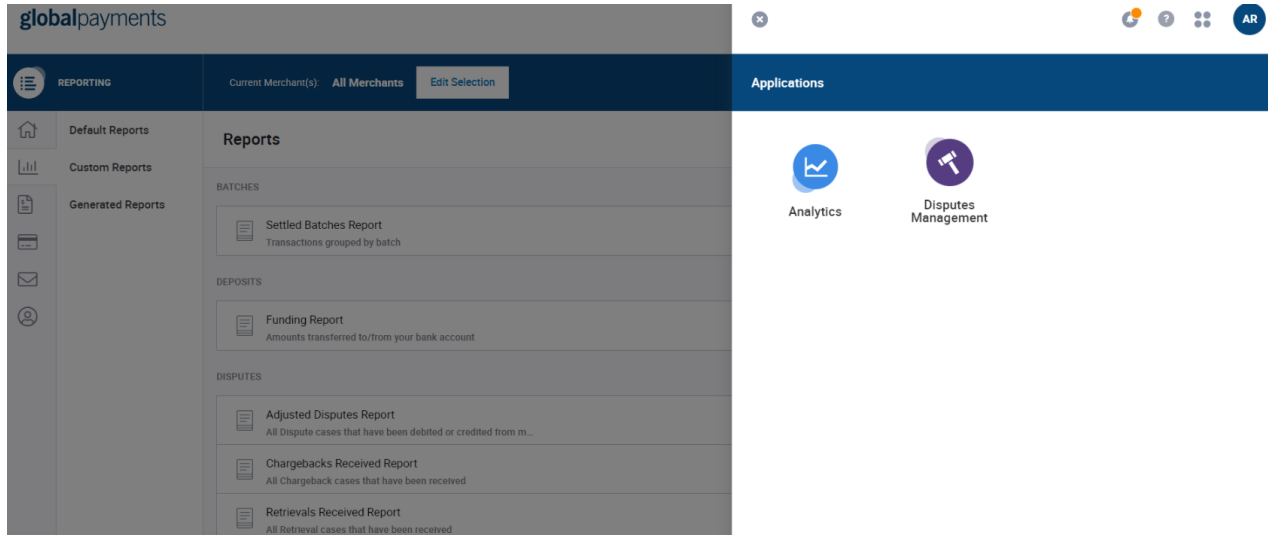
CORP	REGION	PRINCIPAL	ASSOCIATE	CHAIN	MERCHANT ID
Select	Select	Select	All	All	Ents

The 'Add More' button is located below the table. The 'User Summary' panel on the right shows 'User Information' (None Entered), 'Role & Permissions' (Account Administrator), and 'Data Access' (None Selected). The 'Create User' button is highlighted with a red box at the bottom right.

# Application drawer

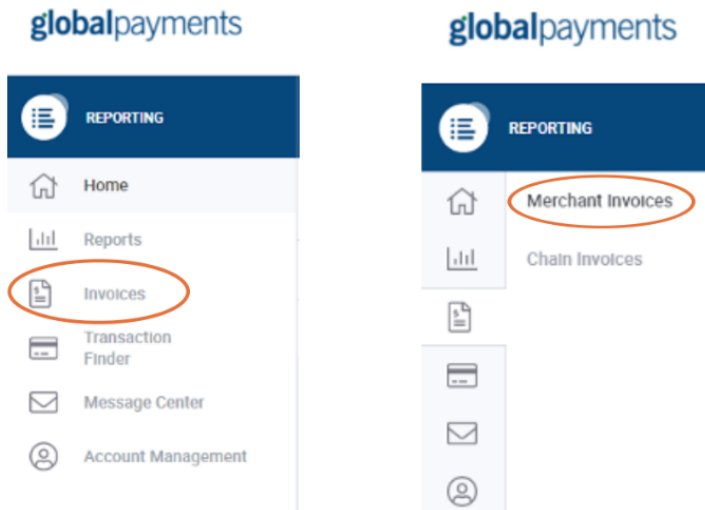
To access other applications from Merchant Portal, click on the **Application Drawer** button, which is located on the top right of the page, as shown in the screenshot below..

This is where you can access the **Disputes Management** and **Analytics** tools.



# How to find your monthly invoices

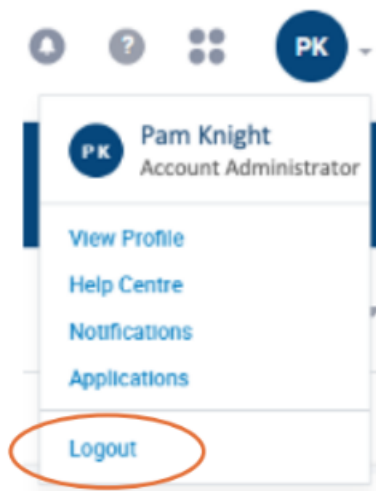
Find your monthly online invoices via the **Invoices/Statements** tab. Then choose Merchant Invoices/Statements, (for individual MIDs), or Chain Invoices/Statements, (for Chain level invoices). Chain level invoices will need to be requested.





# Signing out of Merchant Portal

To sign out of Merchant Portal, click on your profile button at the top right-hand side and click the **Logout** button, as shown below. This will log you out of every Merchant Portal page.



For more, visit us at [globalpayments.com/en-gb](https://globalpayments.com/en-gb)

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