Merchant Portal
Quick start user guide

globalpayments

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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

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

^only available on Merchant Portal Standard
*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.

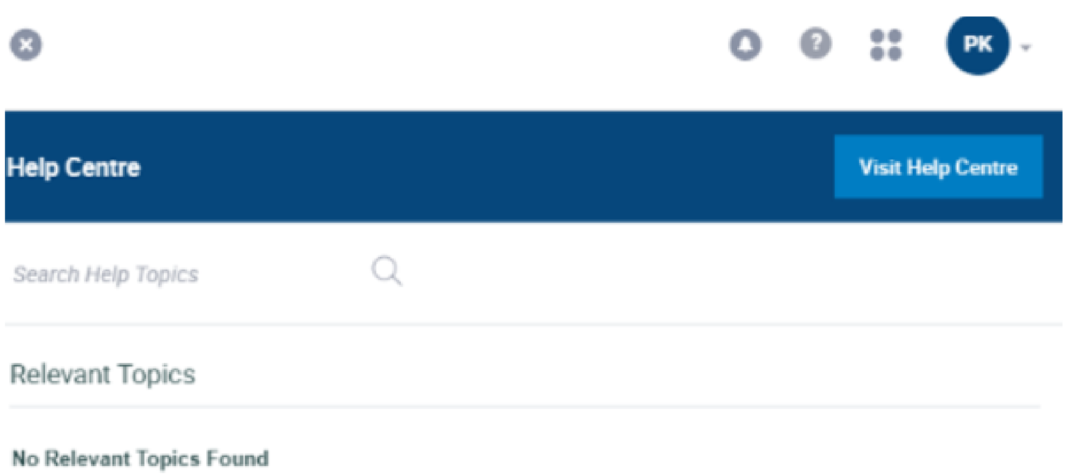
● **Stay up-to-date** with the latest activity on your account with dispute alerts that give you quick updates without having to log in to the system.

● **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.

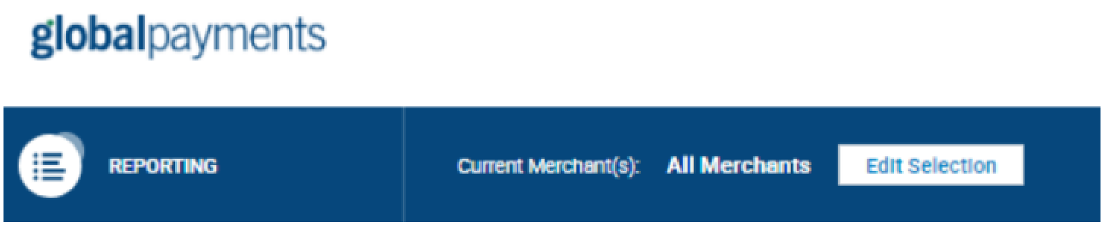
After clicking on the question mark symbol, you'll see the following screen appear on the right-hand side panel with the link to the Help Centre.



Logging into Merchant Portal

What you'll need to log in:

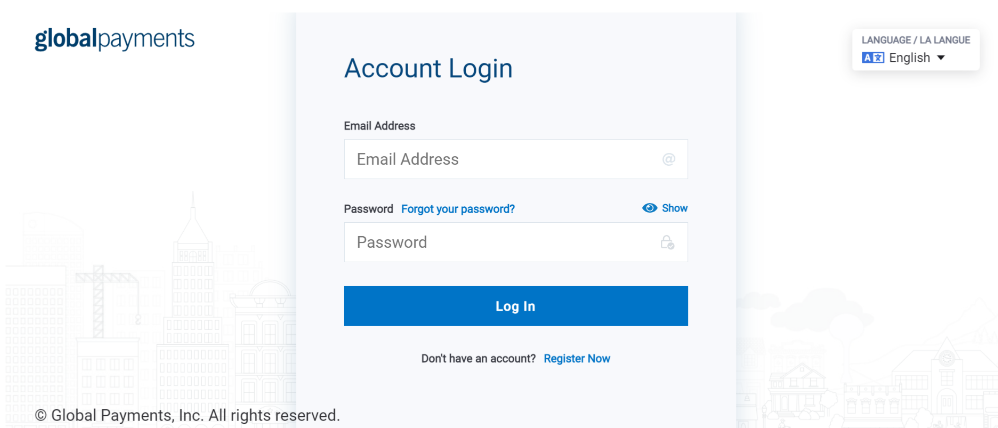
- Your login details: email address and password.
- Merchant number, or hierarchy details, so that you can filter your transactional activity. There's a merchant selector that can be used to drill down by individual merchant number, or multiple merchant numbers, which can be found at the top of your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



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

Login page

To log into Merchant Portal, enter 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

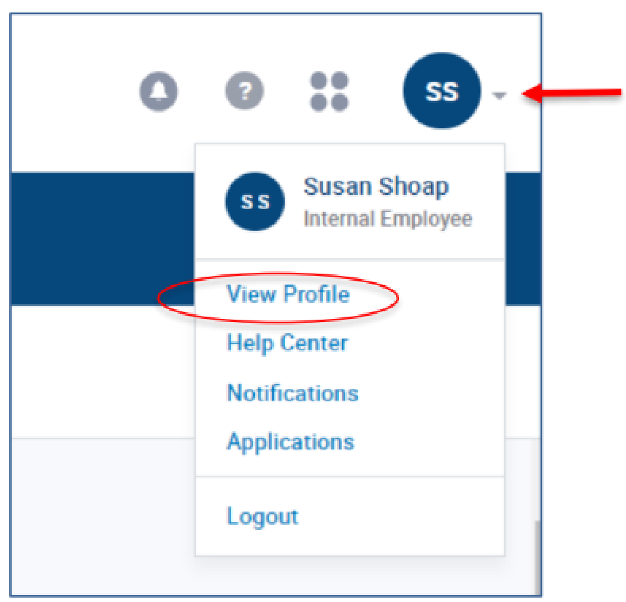
Once you're logged in, you'll see your Dashboard, as shown below:

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.

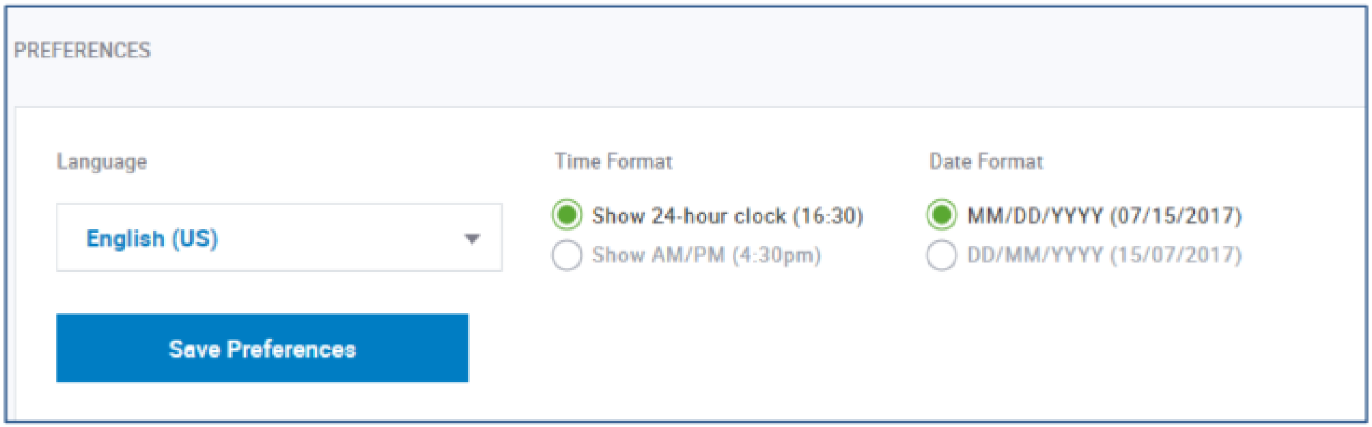
User preference settings

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:
    a. **Language** - click the drop-down arrow in the Language selection box and select your preferred language.
    b. **Time format** - select your preferred time display from the two options available.
    c. **Date format** - select your preferred date format display from the two options available.
5. Then click the **Save Preferences** button to save your changes.

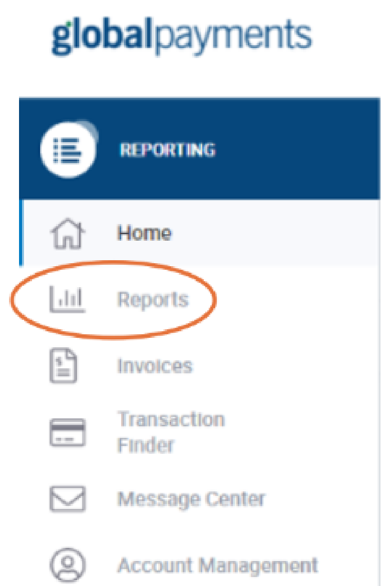


Reports

In the Reports section, you can:

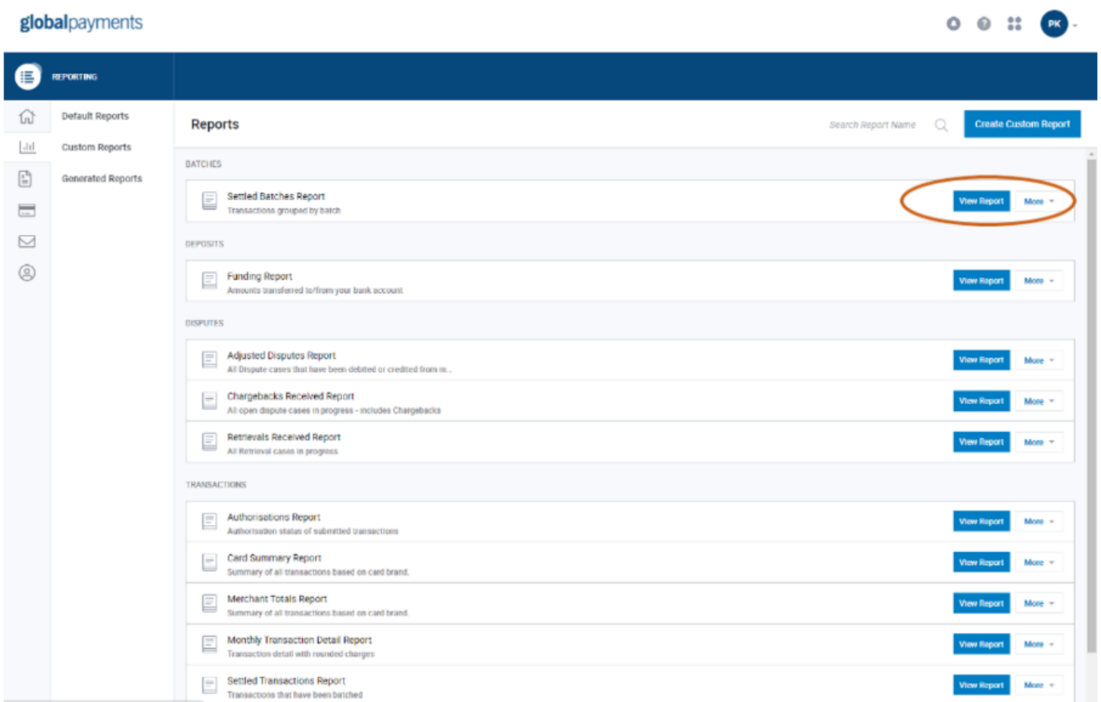
1. **Generate** reports using a wide range of search and filter options.
2. **Customise** your reports by clicking on the 'create' custom report option.
3. **Export** reports.

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



Reports home page

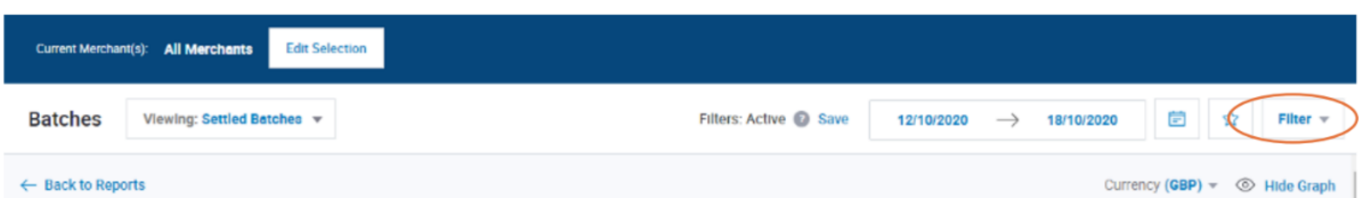
The initial reports page has the reports broken out by categories so you can quickly identify how you'd like to view your transactional activity:



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

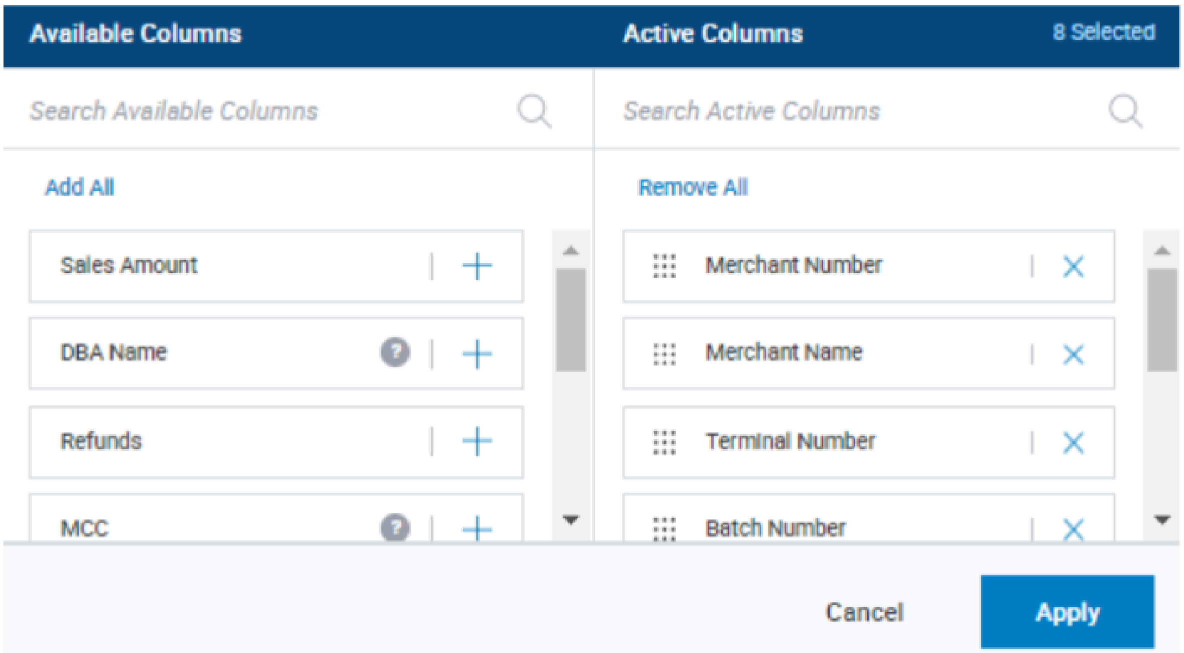
To narrow your search results, you can use the filter button at the top right of the window. Once the filters are entered, click on **Apply** to generate the report.



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.



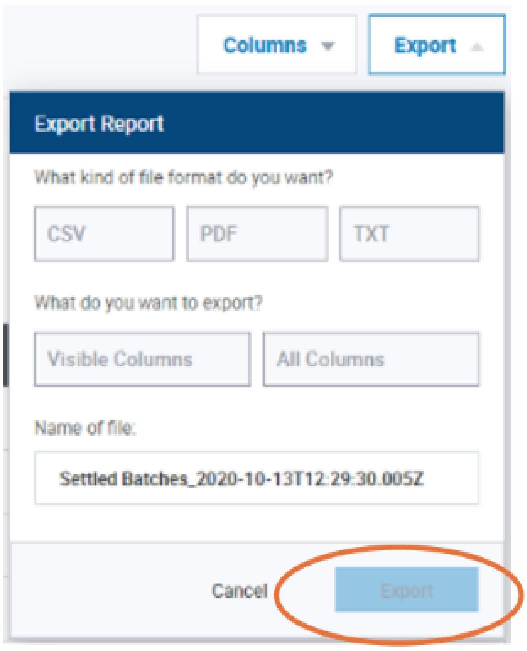
Exporting reports

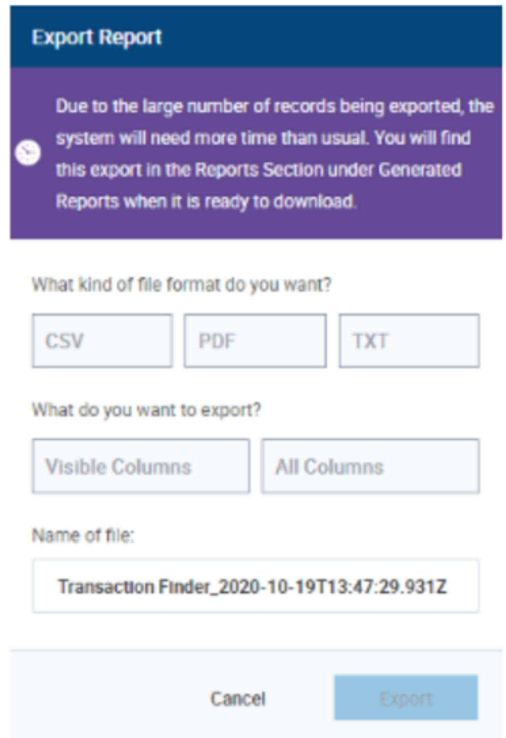
Merchant Portal allows you to export and save reports as a CSV, TXT, or PDF file, you can then:
1. **Save** the report and refer back to it as and when you need to.
2. **Analyse** the data to give you an in-depth understanding of how your business is doing.
3. **Transfer** the data to other applications (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**.

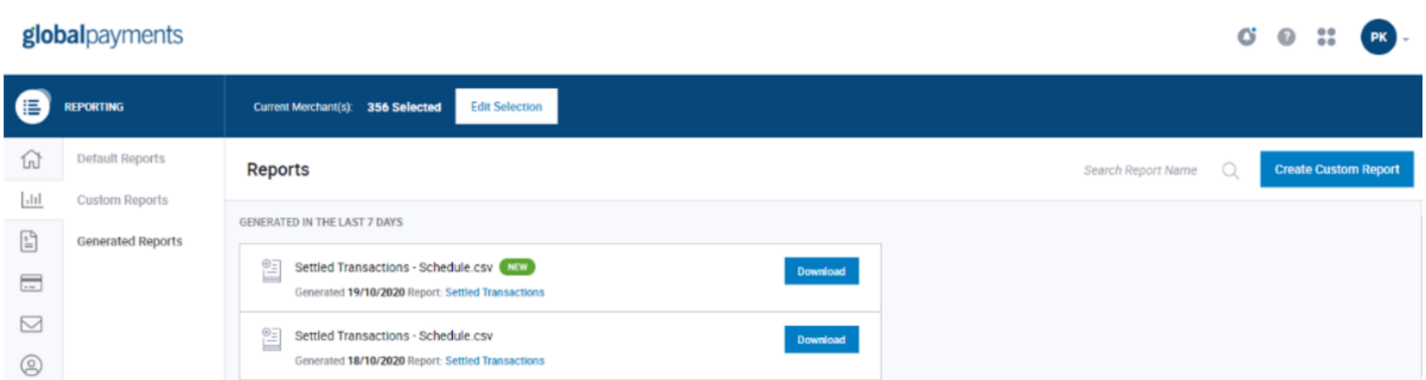
If your export contains large amounts of records and data, the system will provide you with a notification, as below. And when the report is ready and available for you to download, it will appear in the Generated Reports tab.





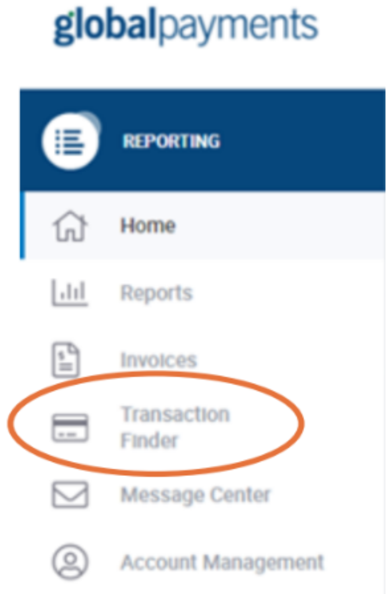
How to access generated reports

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.

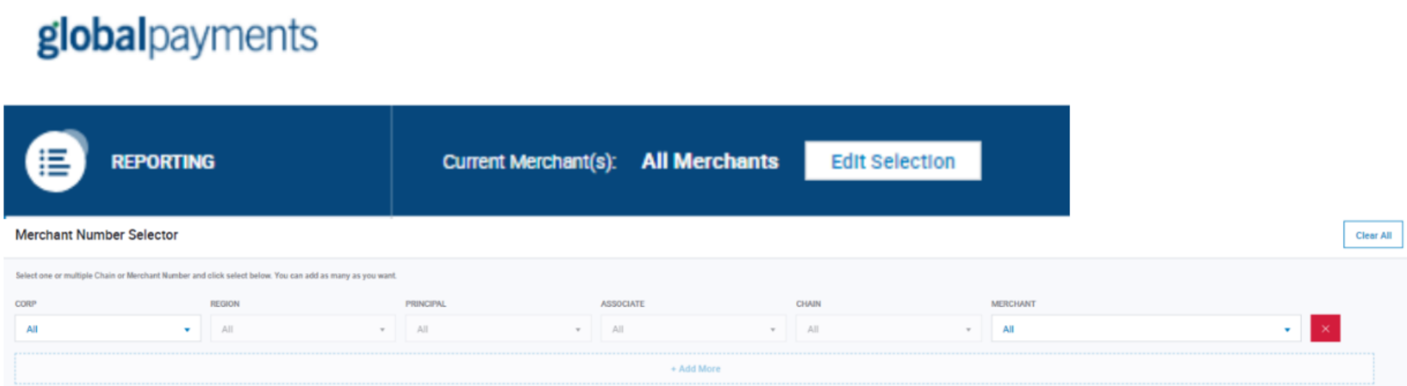


How to troubleshoot transactions

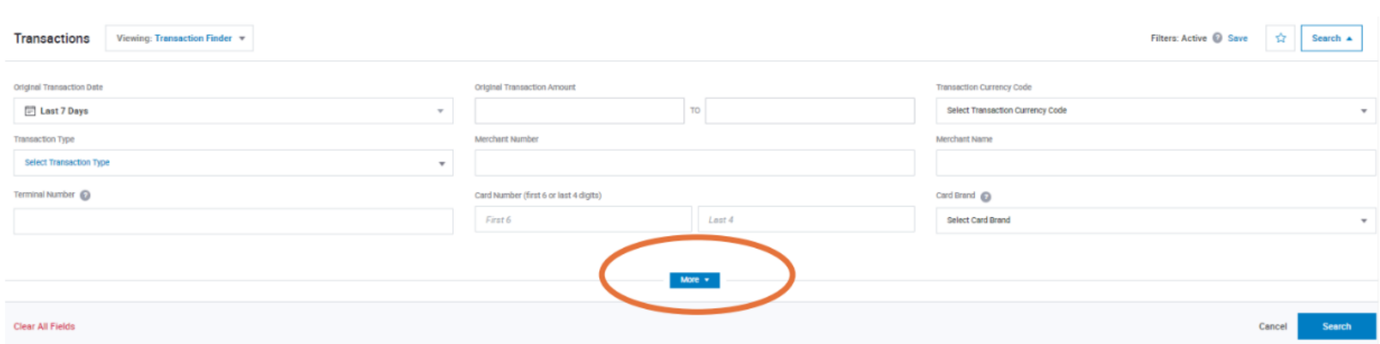
1. On the left menu bar, click **Transaction Finder**.



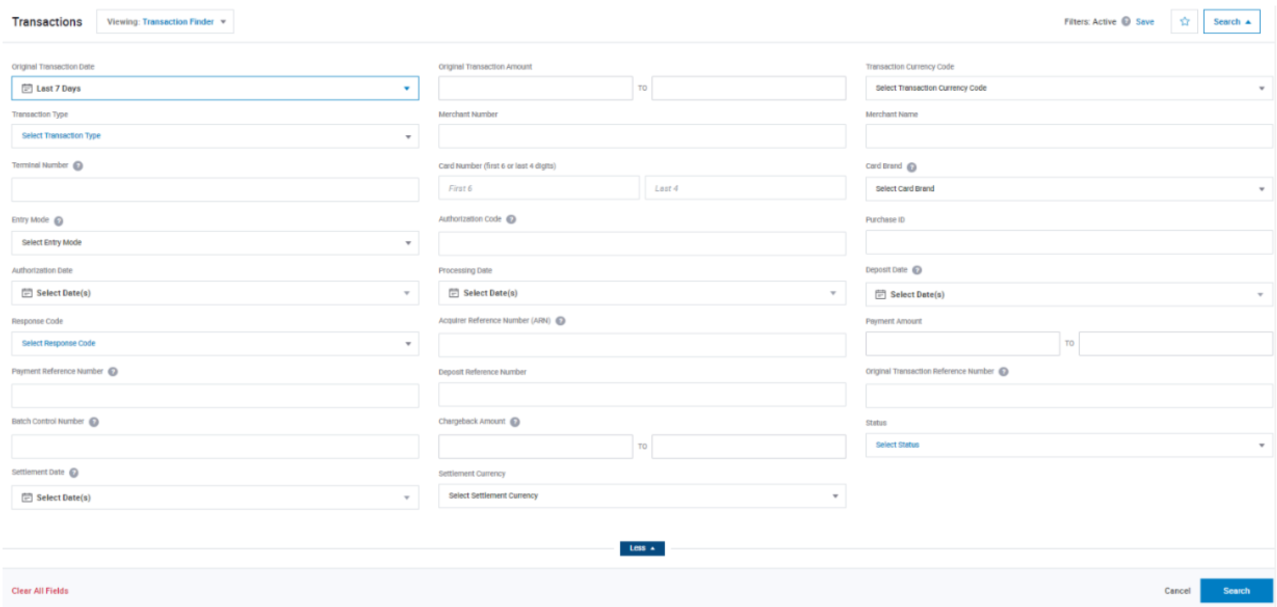
2. Select one or more merchant numbers using the **Merchant Number Selector**.



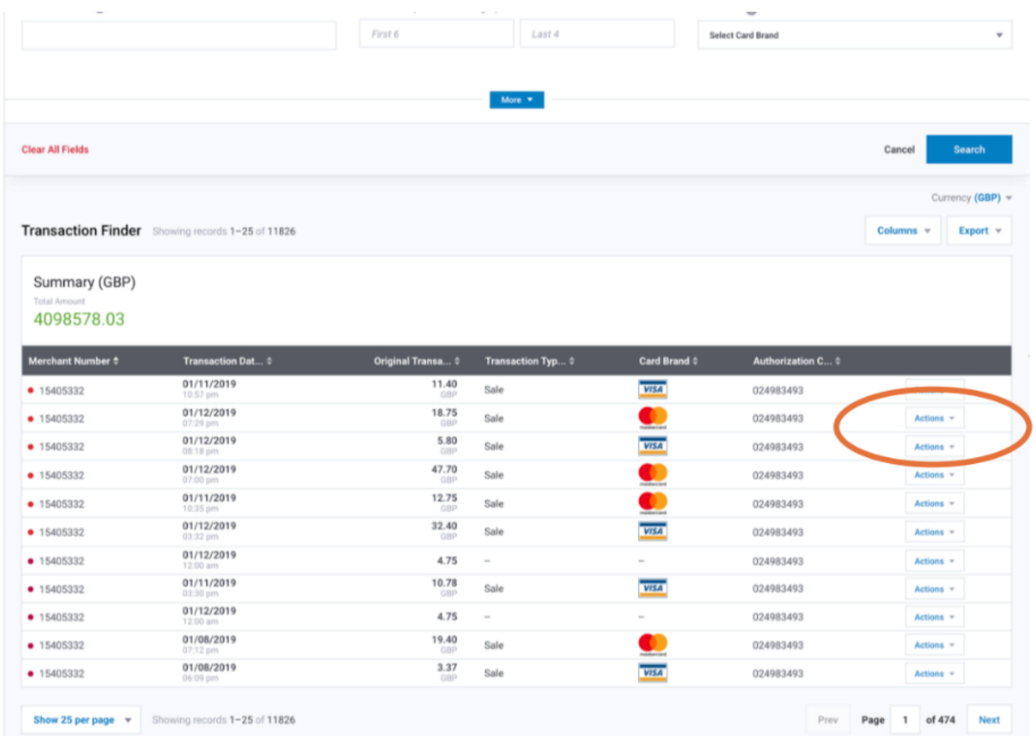
3. Type in or select the transaction information in the search criteria fields:



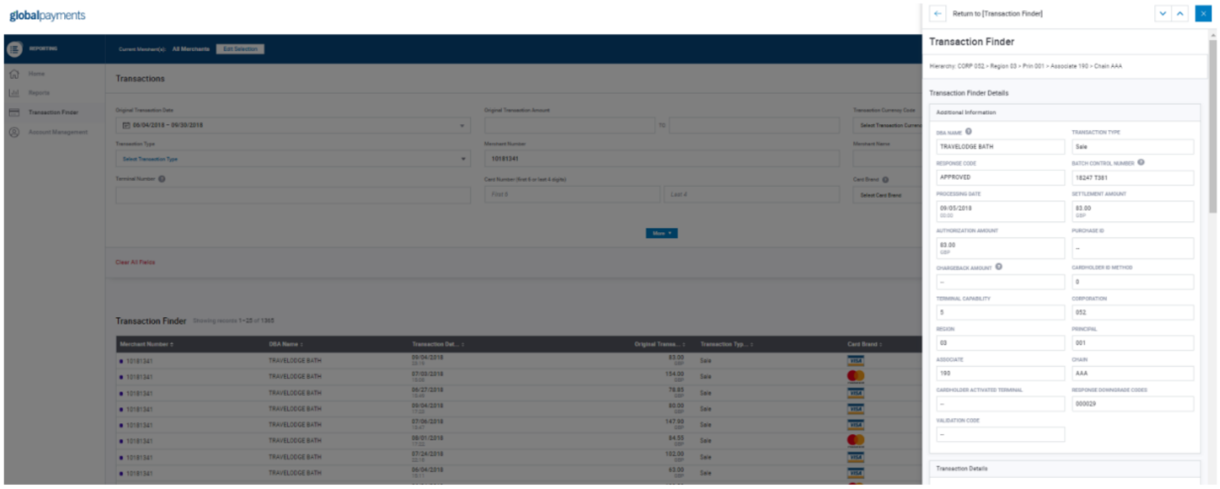
4. For advanced search options, click on **More** as shown in the previous image and the following will be displayed.



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.



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



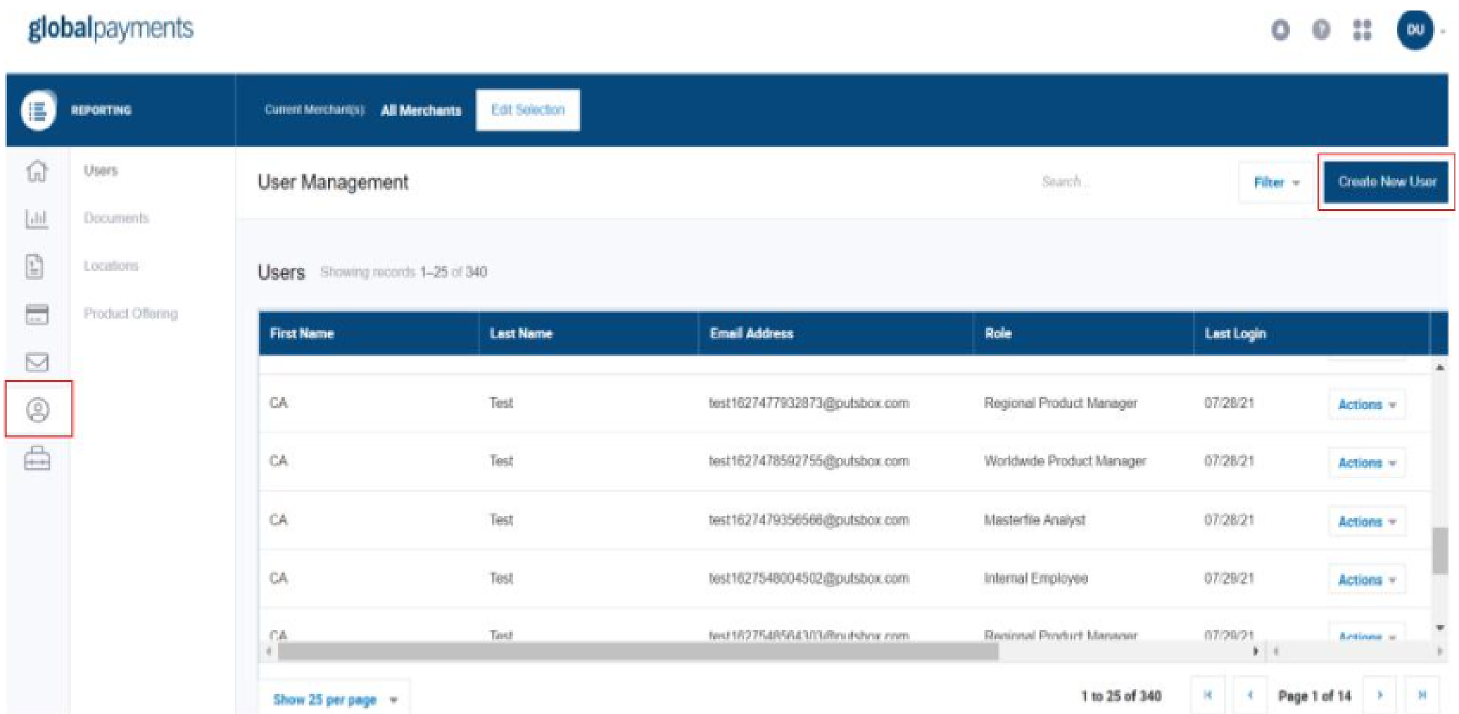
User management

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

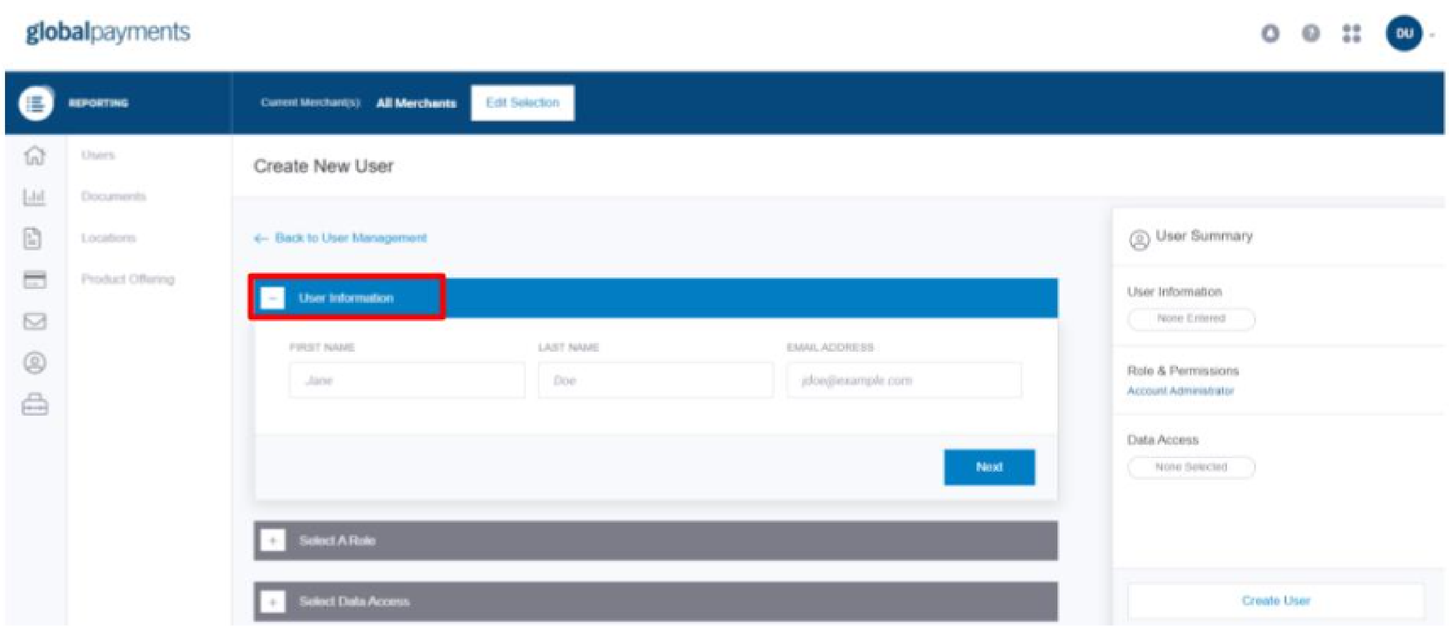
- Users
- Locations
- Statements
- Documents
- Product offering

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.

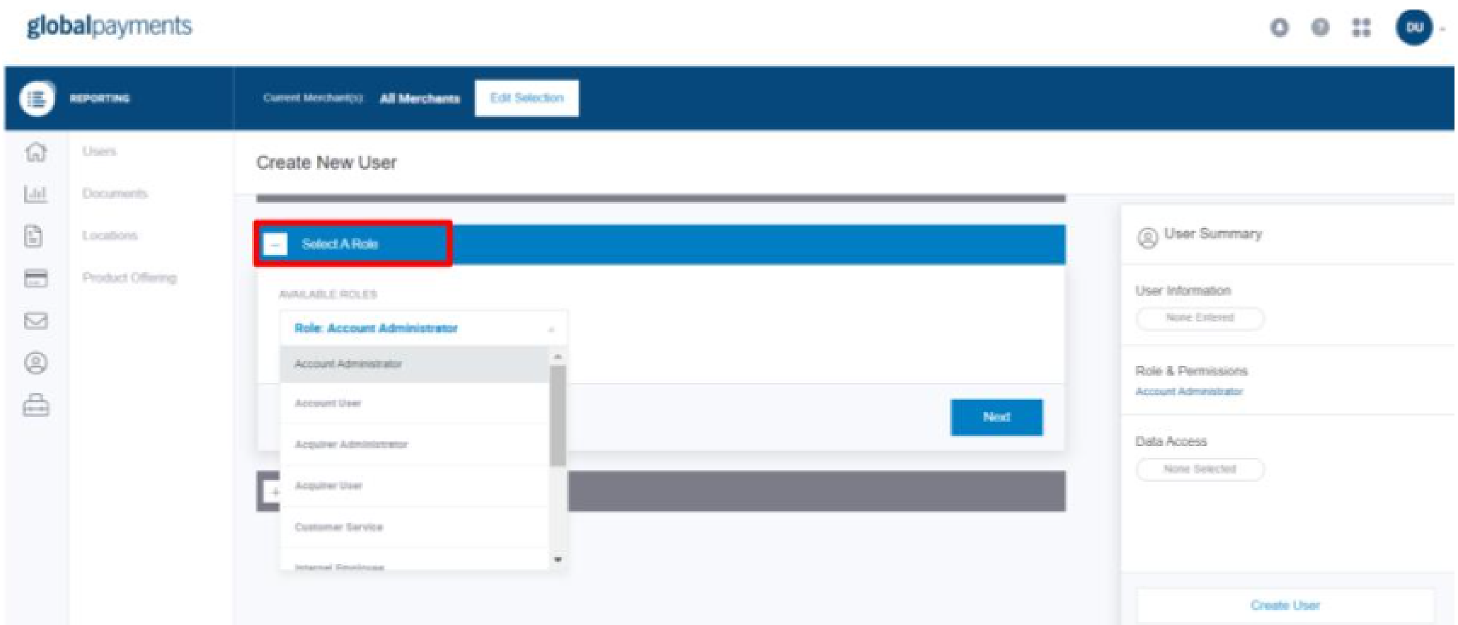


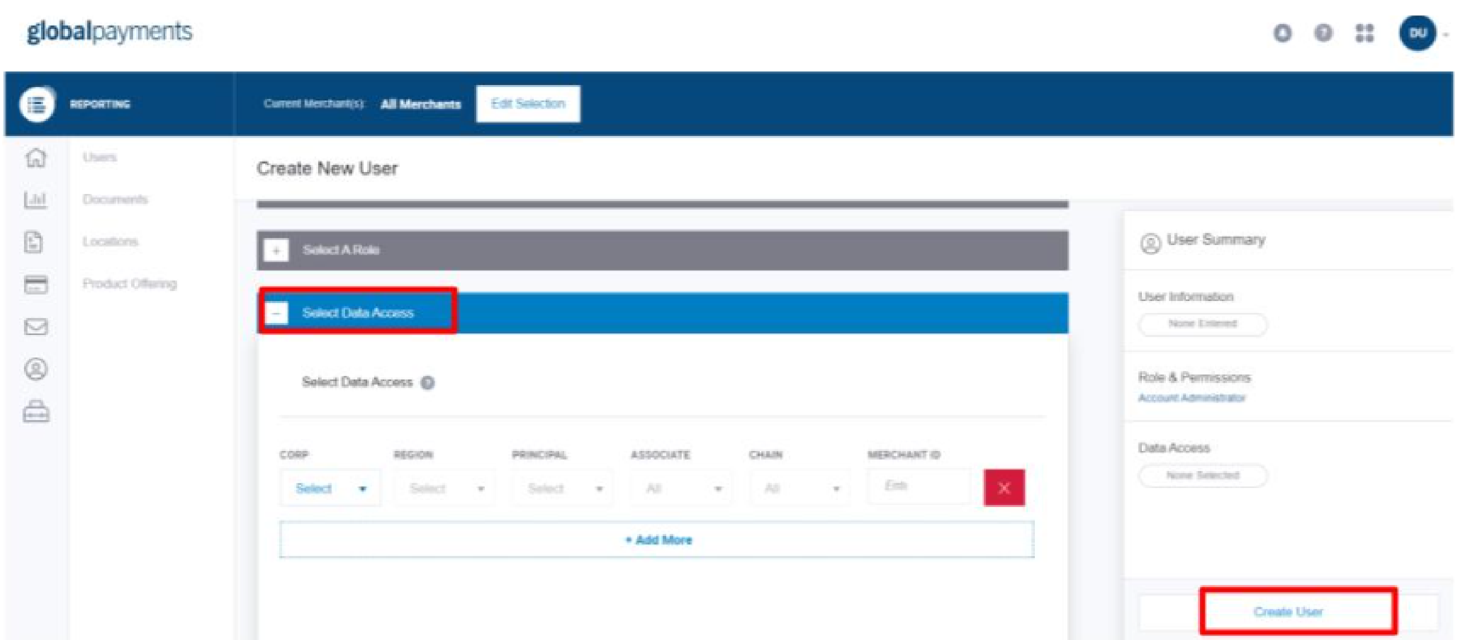
To modify a user's account permissions or data access, click on **Actions** > **Edit User**.



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.

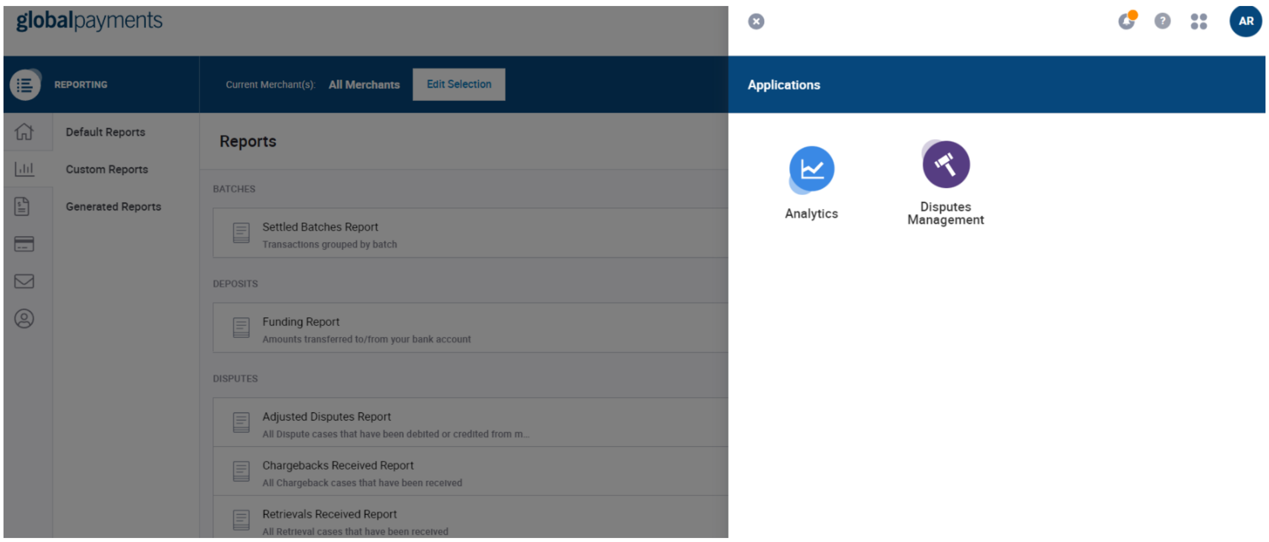




Application drawer

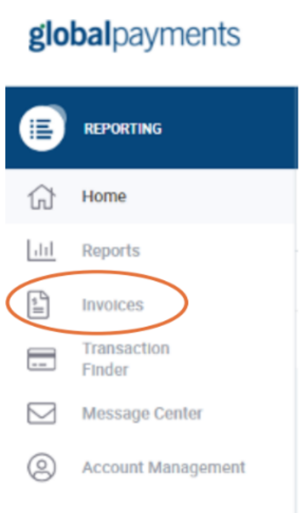
To access other applications from Merchant Portal, click on the **Application Drawer** button, which is located on the top right of the page, as shown in the screenshot below..

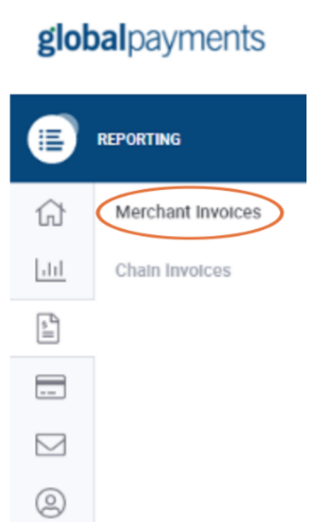
This is where you can access the **Disputes Management** and **Analytics** tools.



How to find your monthly invoices

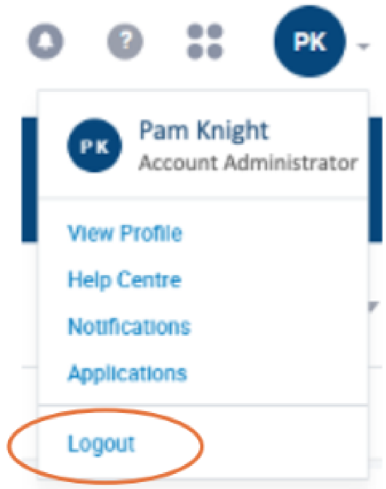
Find your monthly online invoices via the **Invoices/Statements** tab. Then choose Merchant Invoices/Statements, (for individual MIDs), or Chain Invoices/Statements, (for Chain level invoices). Chain level invoices will need to be requested.





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.



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