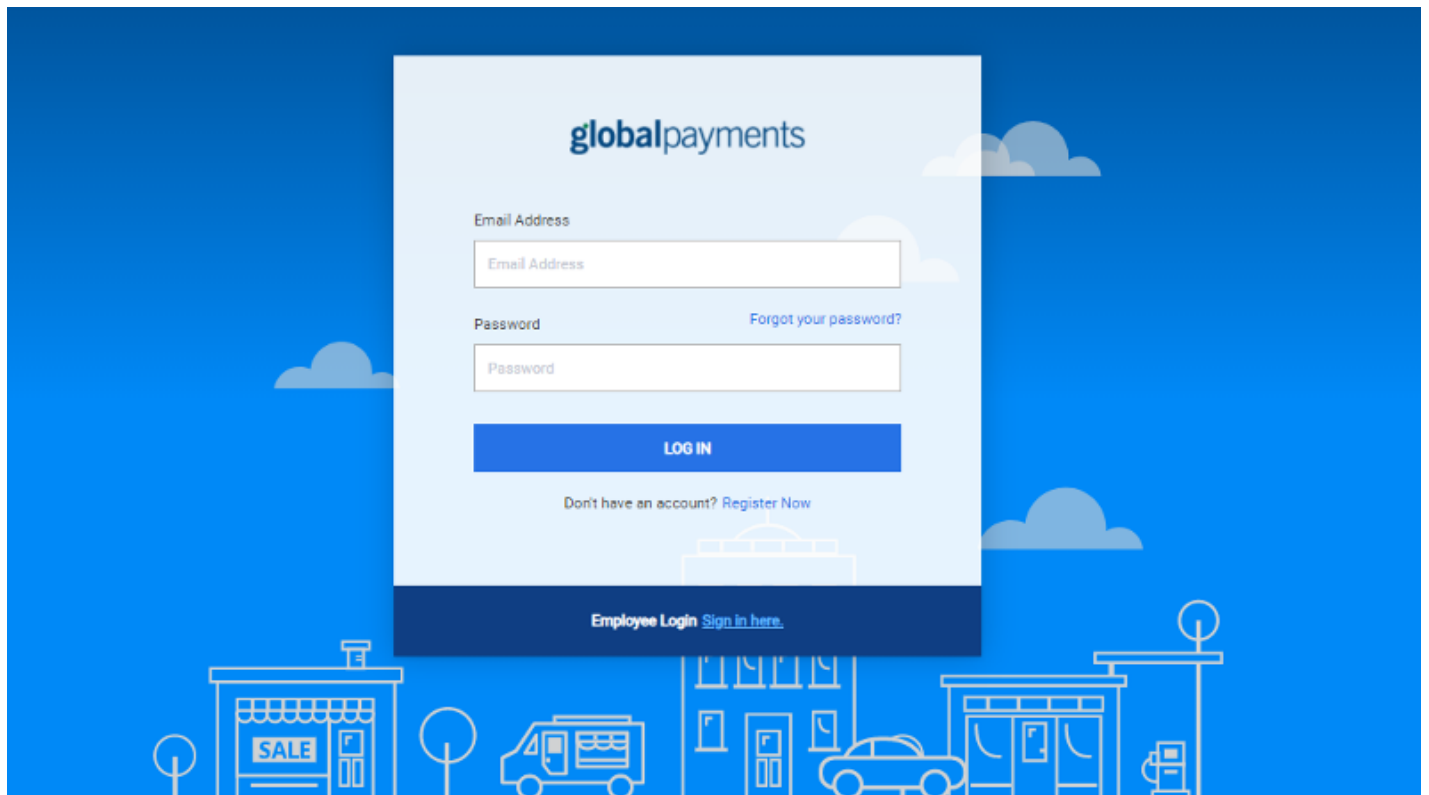


# Merchant Portal

## Quick Start Guide



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# Introduction

## Background

The Global Payments Merchant Portal is an extensive online data management tool, designed to make it simple to find the information that helps you to better understand your customers and make informed decisions about your business. With our intuitive dashboard, transaction finder and self-service tools, you can easily perform daily tasks and locate the important data you need. Access the portal anytime, on any compatible device to enhance your business' efficiency and sell more.

## 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 & Local Business Benchmark	Transaction and customer data helps understand more about your customers and local competitors
Message Centre	Delivers the latest information and payment industry news to your account
Account Management: 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
Tokenised Card Data	Encrypts all sensitive information to reduce data storage risk
Help Centre	Provides important information and answers to your questions

## Key Benefits

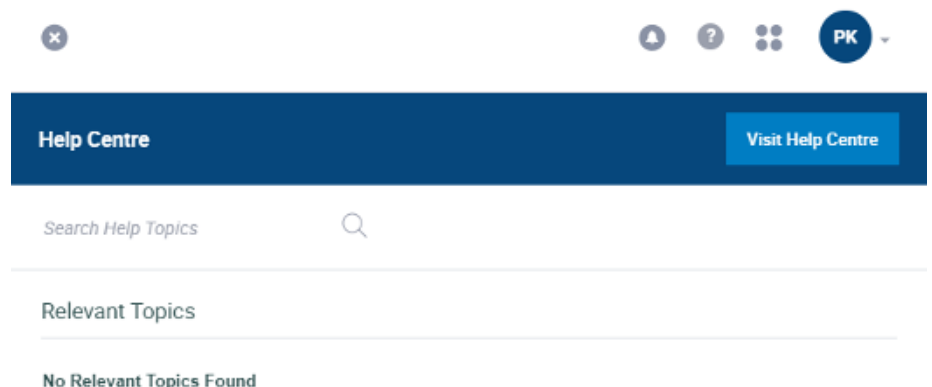
- **Reduce costs and losses** by getting fast resolution of chargebacks with the online dispute management tool. You can view, monitor and respond to dispute cases and upload supporting documents quickly to avoid missing deadlines
- **Save time and gain greater insight into your business** with easy-to-use reports and visuals that offer summarised information on 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 reconciliation and dispute alerts that give you quick updates without having to log into the system
- **Manage your business without all the hassle** through our self-service data management platform. Whether you're contacting customer service, creating additional users or simply setting up new locations, you can view activity online from anywhere, at any time, on any compatible device

## Getting Started

This Quick Start Guide is designed to provide a brief introduction to the Merchant Portal, helping you to get started once you have your log-in credentials. For detailed instructions on how to carry out various functions within the portal, please refer to our online Help Centre, which is accessible via the question mark (?) on the menu bar, at the top right corner of the Merchant Portal window, as shown below:



After clicking on the question mark symbol, this screen will be displayed on your right hand side panel.



## What You Need to Log In

1. Log-in details: email address and password.

**Note:** your account will be deactivated if it's been inactive for 90 days, and deleted if it's been inactive for 120 days.

2. Merchant number, or hierarchy details, will be needed to 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.

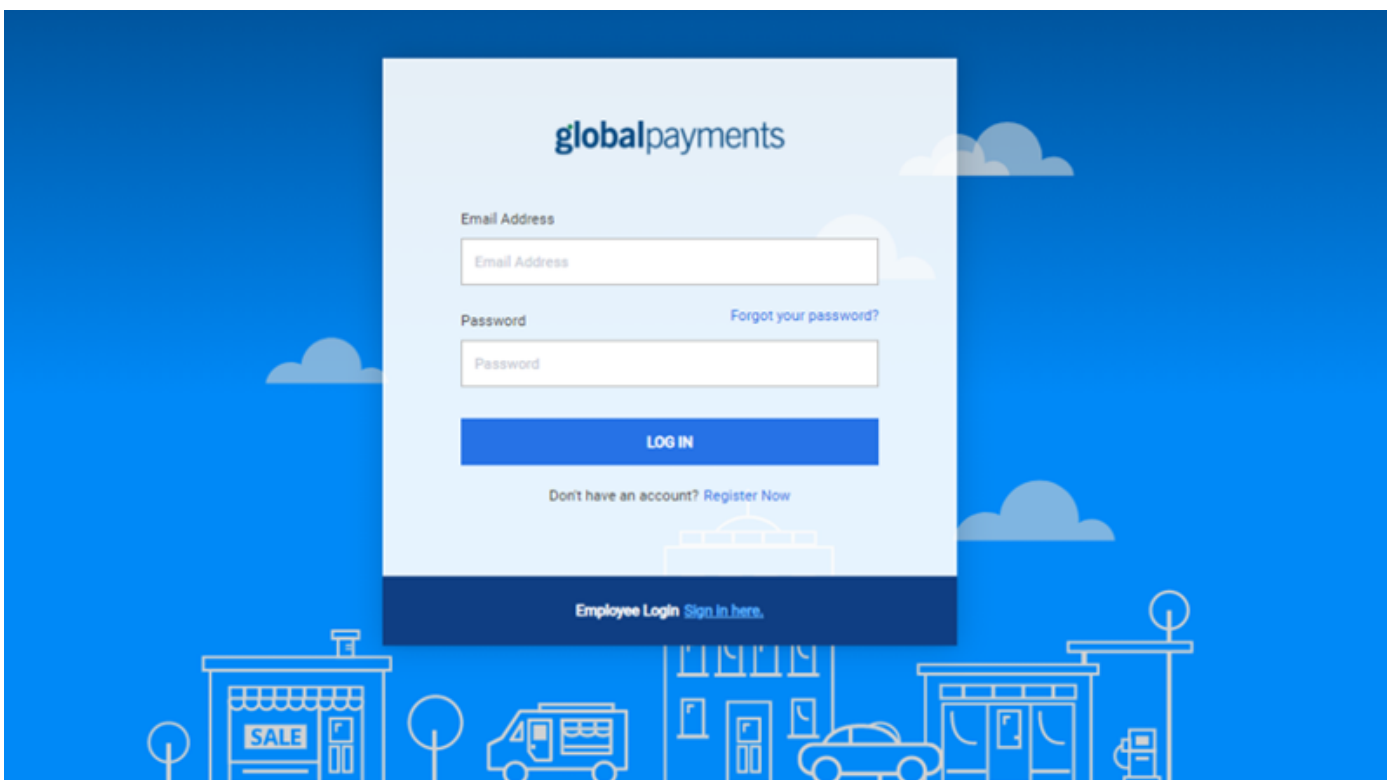


3. Add the Merchant Portal URL (<https://reporting.globalpay.com>) to your favourites, or bookmark it, so you have the link available.

## Logging into Merchant Portal

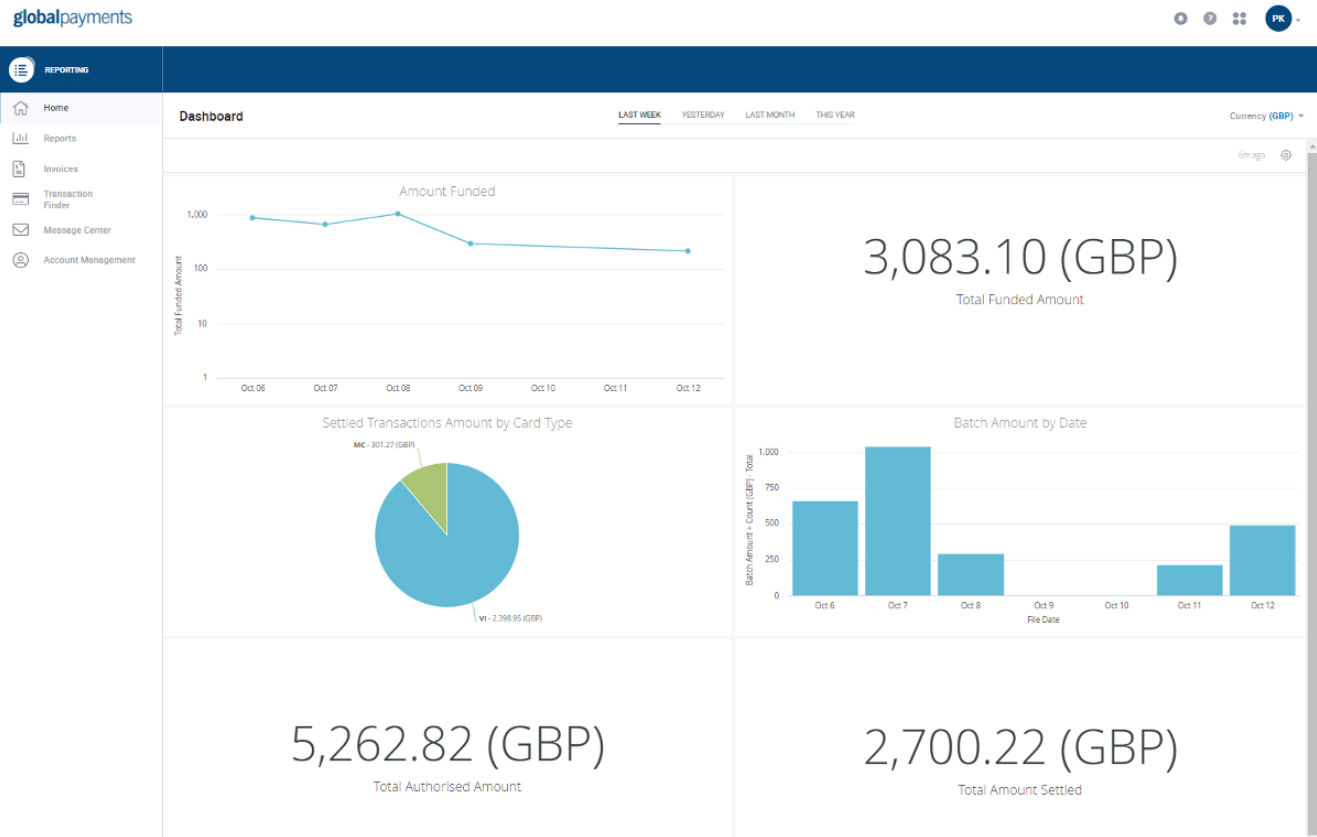
### Log-in Page

To log into Merchant Portal, enter <https://reporting.globalpay.com> into the address bar of your browser. The log-in page, shown below, will ask for an email address and password.



## Initial Merchant Portal Screen

Following the logging in process, you'll arrive at the initial Merchant Portal screen.



All Merchant Portal pages have a menu bar on the left hand side of the page, which offers a variety of options to the user. The options offered will also vary depending on the privileges associated with the user's profile.

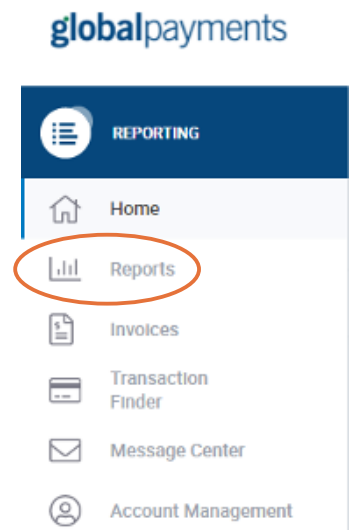
For the purpose of this guide, we'll focus on the reporting functions within the portal.

## Reports

The Reports section enables you to:

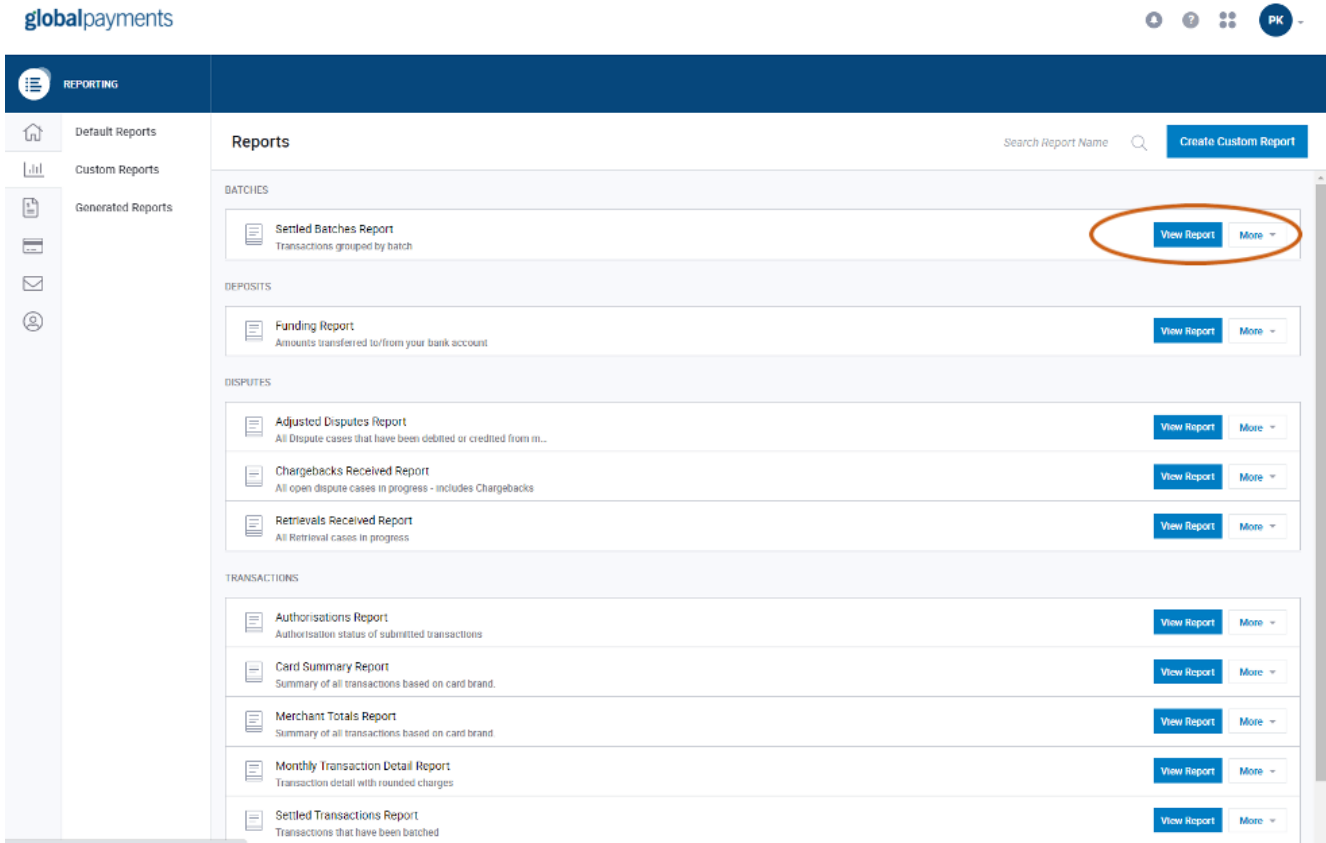
1. Generate reports using a wide range of search and filter options.
2. Customise your reports by clicking on the 'create' custom report option
3. Export reports.

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



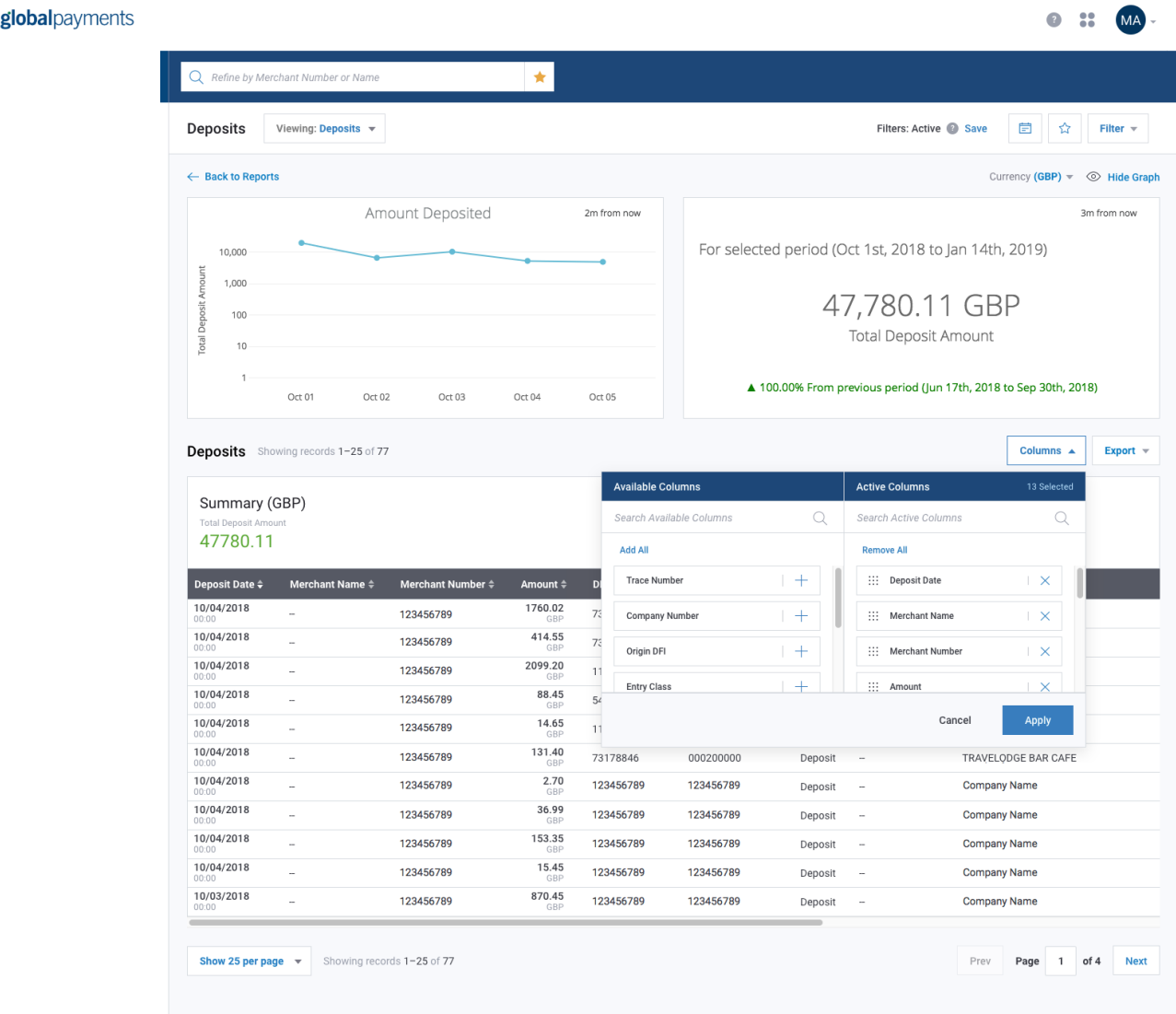
## Initial Reports Page

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



- To select reports:
1. Click on the View Report button on the left hand side, shown above.

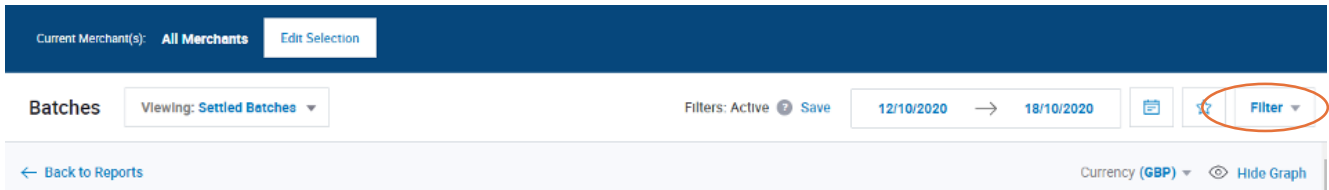
2. Once you've clicked on View Reports, a new screen will open.





## Report Filters

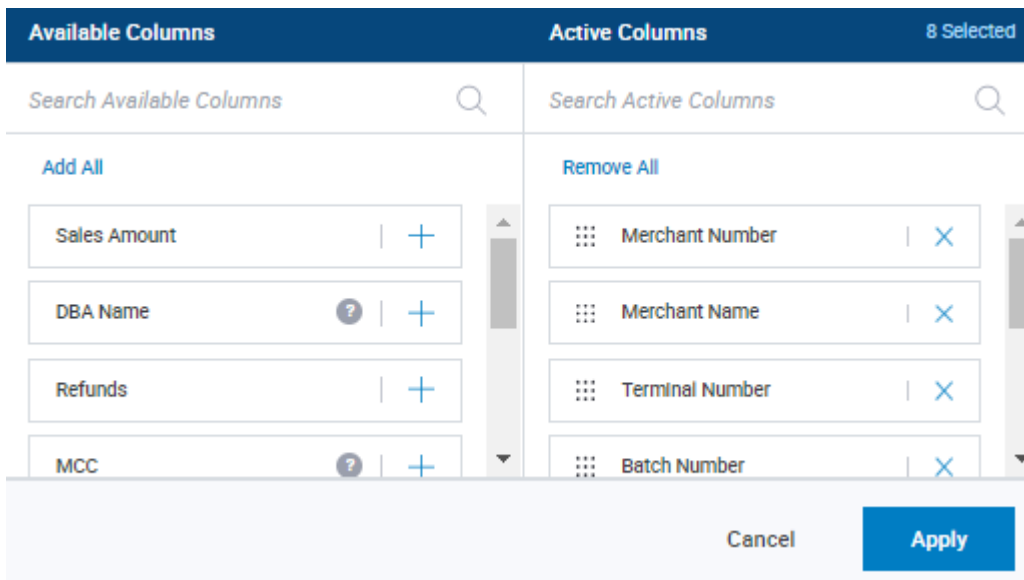
To narrow your search results, you can use the filter button at the top right of the window. Once the filters are entered, click on Apply to generate the report.



The screenshot shows the Merchant Portal interface. At the top, there's a header with 'Current Merchant(s): All Merchants' and an 'Edit Selection' button. Below this, the 'Batches' section is active, showing 'Viewing: Settled Batches'. To the right, there are filters for 'Active', a date range from '12/10/2020' to '18/10/2020', and a 'Filter' button which is circled in orange. At the bottom, there are links for 'Back to Reports', 'Currency (GBP)', and 'Hide Graph'.

Once applied, you can Save your filter.

In addition, the Column manager allows you to customise what fields you'd like to show on screen and export.



The screenshot shows the Column Manager interface. It is divided into two main sections: 'Available Columns' and 'Active Columns'. The 'Available Columns' section has a search bar and a list of columns: 'Sales Amount', 'DBA Name', 'Refunds', and 'MCC'. Each column has a plus sign to add it. The 'Active Columns' section has a search bar and a list of columns: 'Merchant Number', 'Merchant Name', 'Terminal Number', and 'Batch Number'. Each column has a minus sign to remove it. At the bottom, there are 'Cancel' and 'Apply' buttons.

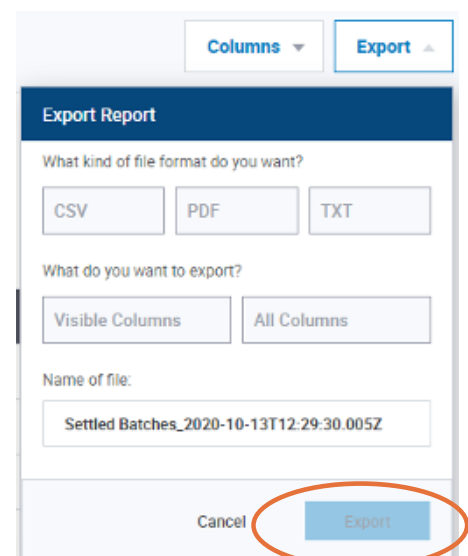
## Exporting Reports

Merchant Portal allows you to export and save the reports as CSV, TXT or PDF files. There are various advantages to having the reports in those formats:

1. Save them and refer back to them 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 completed the steps mentioned above and generated a report, click on the Export button. When completing an export you have the option to download CSV, TXT or PDF and also be able to select just visible columns or all columns in your export selection.



The screenshot shows the 'Export Report' dialog box. It has a 'Columns' dropdown and an 'Export' button. The dialog asks 'What kind of file format do you want?' with options for 'CSV', 'PDF', and 'TXT'. It also asks 'What do you want to export?' with options for 'Visible Columns' and 'All Columns'. Below this, there is a field for 'Name of file:' with the text 'Settled Batches\_2020-10-13T12:29:30.005Z'. At the bottom, there are 'Cancel' and 'Export' buttons, with the 'Export' button circled in orange.

If the data records are too large based on the number of records being exported, the system will need more time to generate your report. Therefore, once generated, the report will appear in the Generated Reports tab after it's completed.

Export Report

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.

What kind of file format do you want?

CSV

PDF

TXT

What do you want to export?

Visible Columns

All Columns

Name of file:

Transaction Finder\_2020-10-19T13:47:29.931Z

Cancel

Export

## How to Access Generated Reports

Once your report is ready to view, you'll be able to retrieve it under the Generated reports tab located in the Reports section of the portal.

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REPORTING

Current Merchant(s): 356 Selected

Edit Selection

Default Reports

Custom Reports

Generated Reports

Reports

Search Report Name

Create Custom Report

GENERATED IN THE LAST 7 DAYS

Settled Transactions - Schedule.csv

NEW

Download

Generated 19/10/2020 Report: Settled Transactions

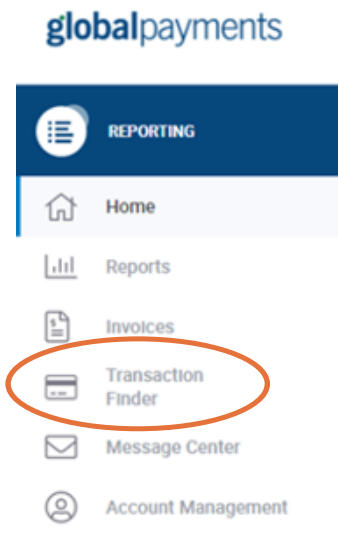
Settled Transactions - Schedule.csv

Download

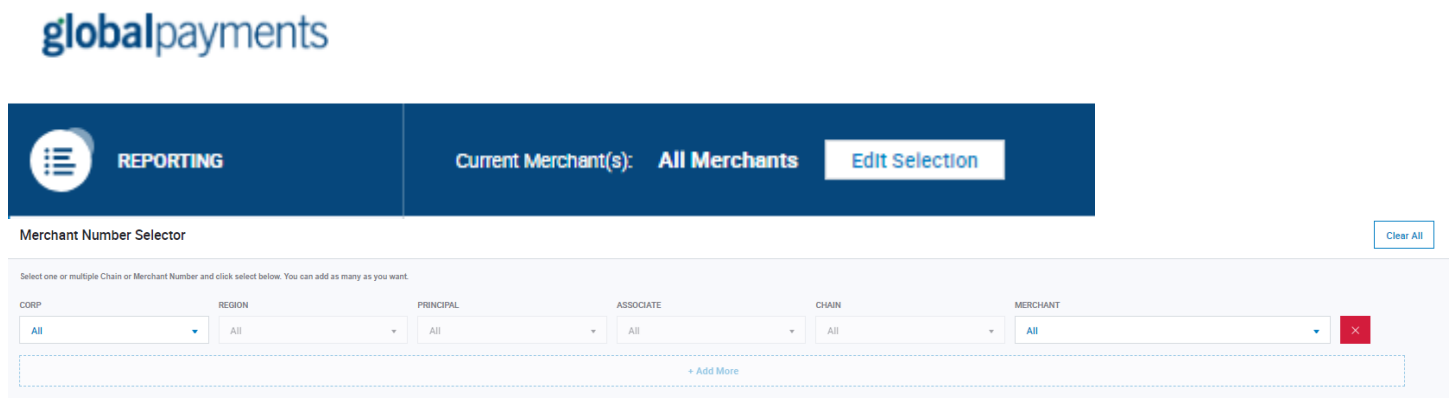
Generated 18/10/2020 Report: Settled Transactions

# How to Troubleshoot Transactions

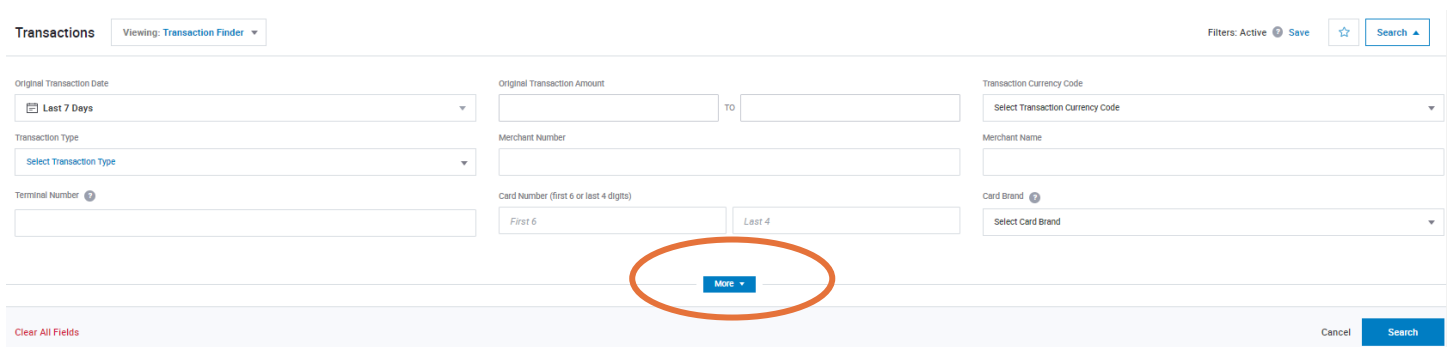
1. On the left menu bar, click Transaction Finder.



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



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



The screenshot shows the 'Transactions' search criteria section. It includes a 'Viewing: Transaction Finder' dropdown and a 'Filters: Active' status. The search criteria fields are organized into three columns. The first column contains 'Original Transaction Date' (set to 'Last 7 Days'), 'Transaction Type' (a dropdown), and 'Terminal Number' (a text field). The second column contains 'Original Transaction Amount' (a range selector), 'Merchant Number' (a text field), and 'Card Number (first 6 or last 4 digits)' (two text fields labeled 'First 6' and 'Last 4'). The third column contains 'Transaction Currency Code' (a dropdown), 'Merchant Name' (a text field), and 'Card Brand' (a dropdown). A 'More' button is circled in orange at the bottom of the search criteria section. At the bottom right, there are 'Cancel' and 'Search' buttons.

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

Transactions Viewing: Transaction Finder Filters: Active Save Search

Original Transaction Date: Last 7 Days

Transaction Type: Select Transaction Type

Terminal Number:

Entry Mode: Select Entry Mode

Authorization Date: Select Date(s)

Response Code: Select Response Code

Payment Reference Number:

Batch Control Number:

Settlement Date: Select Date(s)

Original Transaction Amount: TO

Merchant Number:

Card Number (first 6 or last 4 digits): First 6 Last 4

Authorization Code:

Processing Date: Select Date(s)

Acquirer Reference Number (ARN):

Deposit Reference Number:

Chargeback Amount: TO

Settlement Currency: Select Settlement Currency

Transaction Currency Code: Select Transaction Currency Code

Merchant Name:

Card Brand: Select Card Brand

Purchase ID:

Deposit Date: Select Date(s)

Payment Amount: TO

Original Transaction Reference Number:

Status: Select Status

Clear All Fields Cancel Search

- Once your selection is entered, click Search. Your results will appear in the summary table below your search criteria.

More

Clear All Fields Cancel Search

Currency (GBP)

Transaction Finder Showing records 1–25 of 11826 Columns Export

Summary (GBP)  
Total Amount  
4098578.03

Merchant Number	Transaction Date	Original Transa...	Transaction Typ...	Card Brand	Authorization C...	
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	Mastercard	024983493	Actions
15405332	01/12/2019 08:18 pm	5.80 GBP	Sale	VISA	024983493	Actions
15405332	01/12/2019 07:50 pm	47.70 GBP	Sale	Mastercard	024983493	Actions
15405332	01/11/2019 10:35 pm	12.75 GBP	Sale	Mastercard	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 10:35 pm	10.78 GBP	Sale	VISA	024983493	Actions
15405332	01/12/2019 12:58 pm	4.75 GBP	--	--	024983493	Actions
15405332	01/08/2019 07:12 pm	19.40 GBP	Sale	Mastercard	024983493	Actions
15405332	01/08/2019 06:09 pm	3.37 GBP	Sale	VISA	024983493	Actions

Show 25 per page Showing records 1–25 of 11826 Prev Page 1 of 474 Next

- Additional details about an individual transaction can be found by clicking on Actions located in the summary table image above.

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REPORTING

Home Reports Transaction Finder Account Management

Current Merchant(s) All Merchants Edit Selection

Transactions

Original Transaction Date: 06/04/2018 - 06/30/2018

Original Transaction Amount: To: Select Transaction Currency Code

Transaction Type: Select Transaction Type

Merchant Number: 10181341

Card Number (Mask 6 or last 4 digits): First 6: Last 4: Select Card Brand

Clear All Filters

Transaction Finder Showing records 1-25 of 1355

Merchant Number	DBA Name	Transaction Date	Original Trans.	Transaction Type	Card Brand
10181341	TRAVELODGE BATH	06/04/2018	83.00	Sale	VISA
10181341	TRAVELODGE BATH	07/03/2018	154.00	Sale	MasterCard
10181341	TRAVELODGE BATH	06/27/2018	79.85	Sale	MasterCard
10181341	TRAVELODGE BATH	06/04/2018	80.00	Sale	VISA
10181341	TRAVELODGE BATH	07/06/2018	147.90	Sale	VISA
10181341	TRAVELODGE BATH	08/01/2018	84.55	Sale	MasterCard
10181341	TRAVELODGE BATH	07/24/2018	102.00	Sale	VISA
10181341	TRAVELODGE BATH	06/04/2018	83.00	Sale	VISA

Transaction Finder Details

Hierarchy: CORP 002 - Region 03 - Prin 001 - Associate 190 - Chain AAA

Additional Information

DBA NAME: TRAVELODGE BATH TRANSACTION TYPE: Sale

RESPONSE CODE: APPROVED BATCH CONTROL NUMBER: 18247 T381

PROCESSING DATE: 09/05/2018 SETTLEMENT AMOUNT: 83.00

AUTHORIZATION AMOUNT: 83.00 PURCHASE ID: --

CHARGEBACK AMOUNT: -- CARDHOLDER ID METHOD: 0

TERMINAL CAPABILITY: 5 CORPORATION: 002

REGION: 03 PRINCIPAL: 001

ASSOCIATE: 190 CHAIN: AAA

CARDHOLDER ACTIVATED TERMINAL: -- RESPONSE DOWNGRADE CODES: 000029

VALIDATION CODE: --

Transaction Details

## Application Drawer

In order to access other applications from Merchant Portal, just click on the Application Drawer, which is located on the top right of the page.

This is where you'll access Disputes Management and Analytics.

globalpayments

REPORTING

Default Reports Custom Reports Generated Reports

Reports

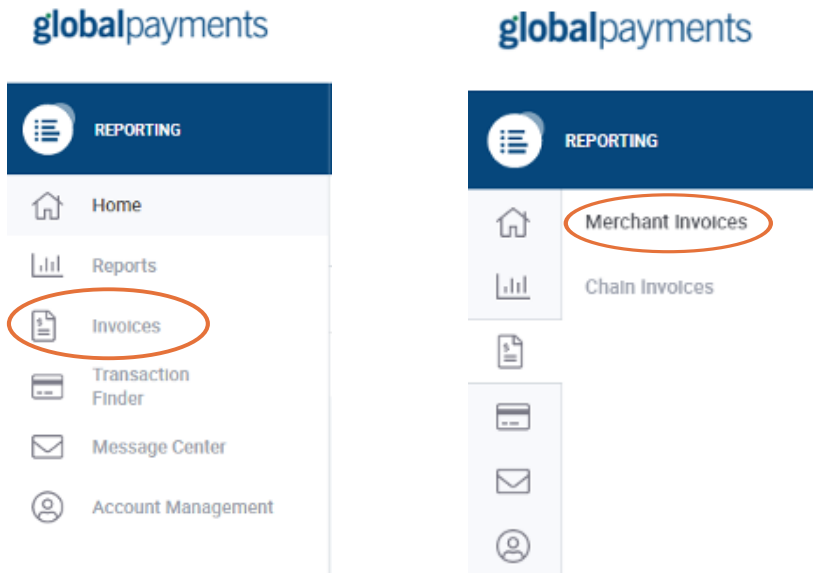
My Reports Shared With Me

Search Report Name

Create Custom Report

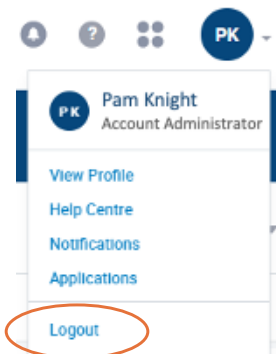
## How to Find Your Monthly Invoices

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).



## Signing Out of Merchant Portal

To sign out of Merchant Portal, click on the profile button at the top right-hand side, which will allow you to Log Out of every Merchant Portal page as shown below:





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Global Payments is HSBC's preferred supplier for card processing in the UK.

Global Payments is a trading name of GPUK LLP. GPUK LLP is authorised by the Financial Conduct Authority under the Payment Service Regulations 2017 (504290) for the provision of payment services and under the Consumer Credit Act (714439) for the undertaking of terminal rental agreements. GPUK LLP is a limited liability partnership registered in England number OC337146. Registered Office: Granite House, Granite Way, Syston, Leicester LE1 5TT. The members are Global Payments U.K. Limited and Global Payments U.K. 2 Limited. Service of any documents relating to the business will be effective if served at the Registered Office.

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