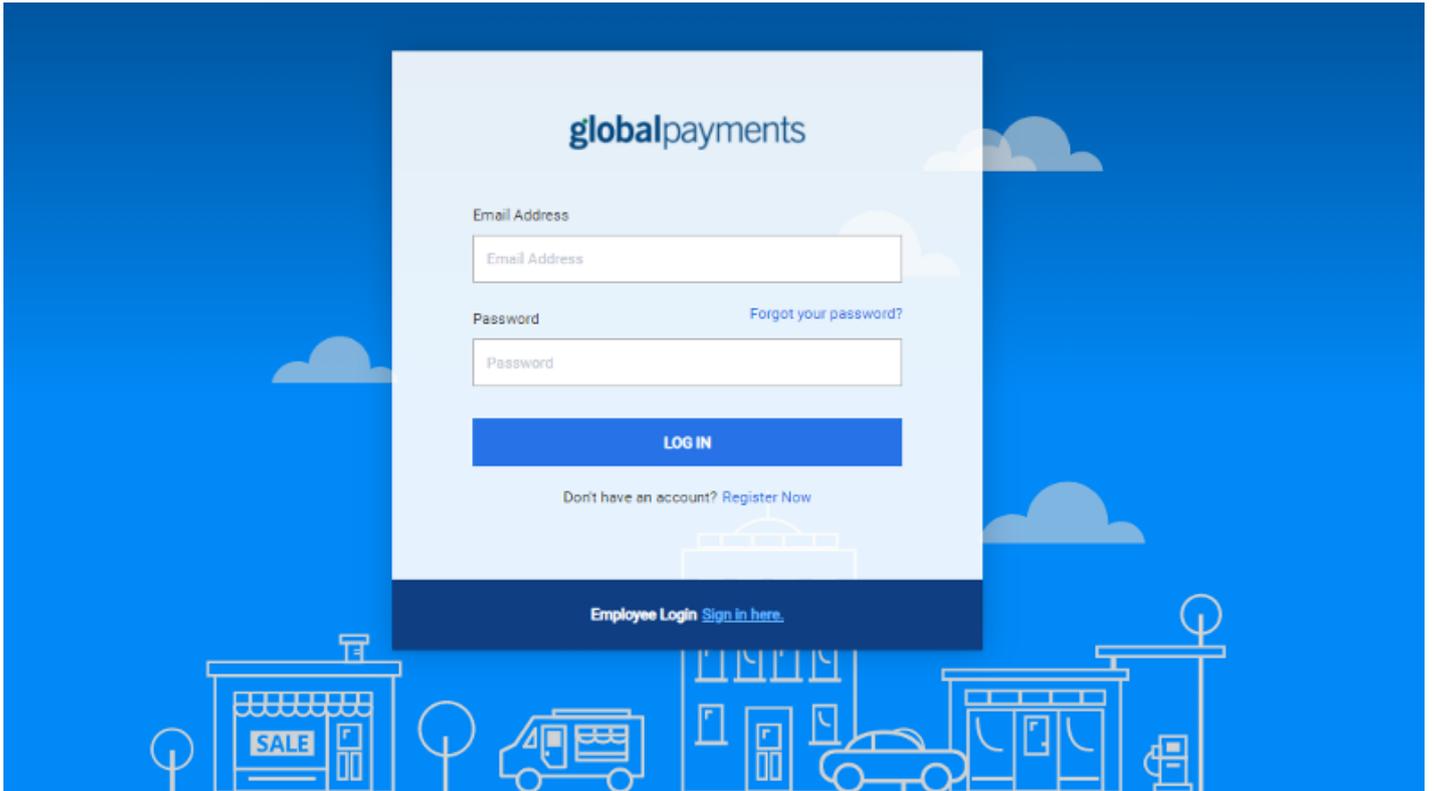


# Merchant Portal

## 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.

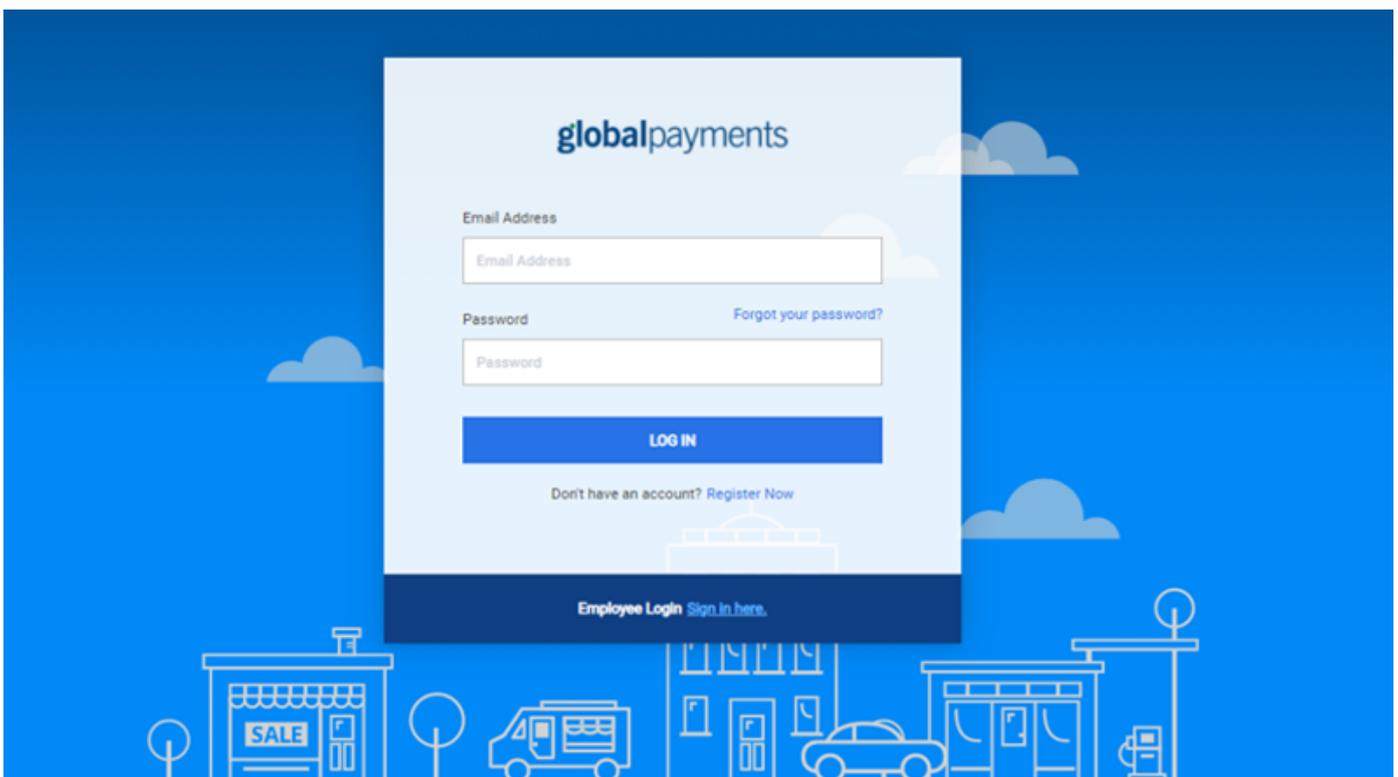


3. Add the Merchant Portal URL (<https://reporting.globalpay.com>) to your favourites, or bookmark it, so you have the link available.

## Logging into Merchant Portal

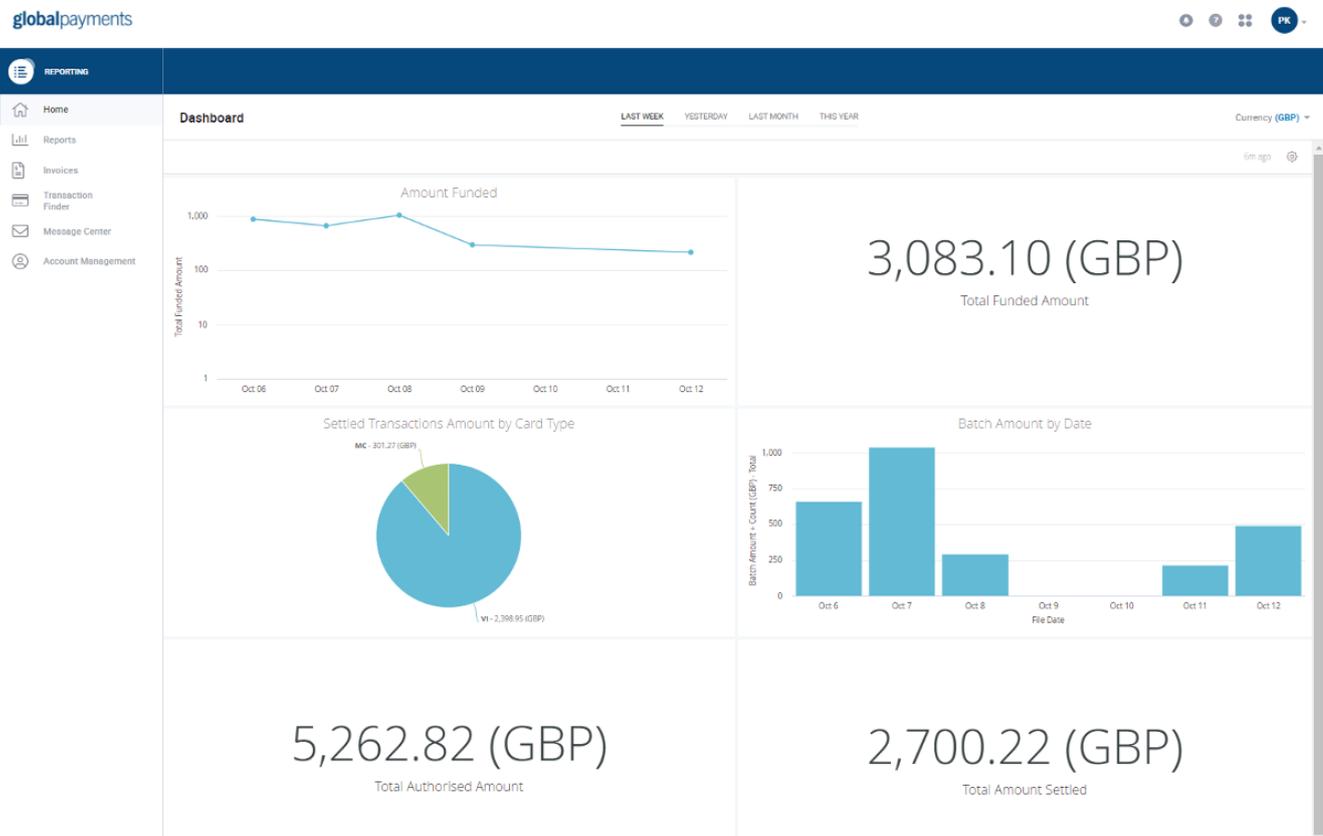
### Log-in Page

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.

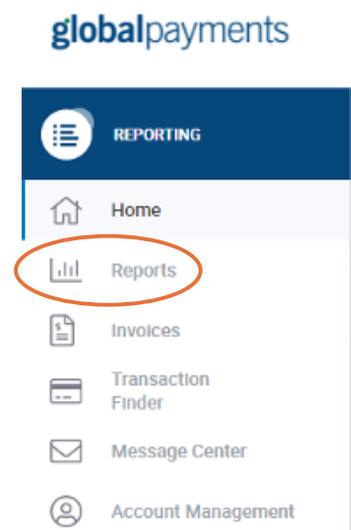
For the purpose of this guide, we'll focus on the reporting functions within the portal.

## Reports

The Reports section enables you to:

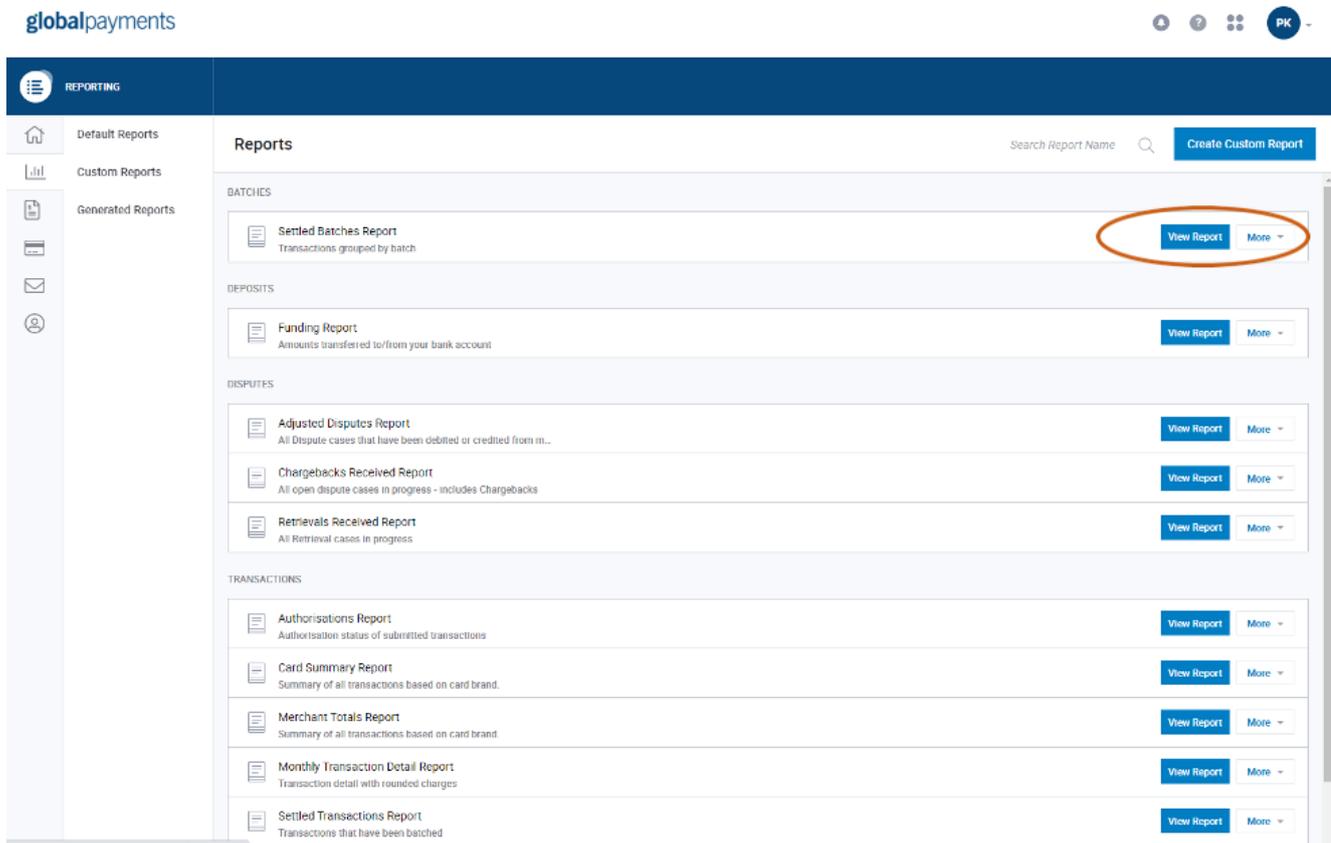
1. Generate reports using a wide range of search and filter options.
2. Customise your reports by clicking on the 'create' custom report option
3. Export reports.

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.

Refine by Merchant Number or Name

Deposits
Viewing: Deposits
Filters: Active Save
Filter

← Back to Reports
Currency (GBP) Hide Graph

For selected period (Oct 1st, 2018 to Jan 14th, 2019)

## 47,780.11 GBP

Total Deposit Amount

▲ 100.00% From previous period (Jun 17th, 2018 to Sep 30th, 2018)

Deposits Showing records 1–25 of 77

Columns
Export

**Summary (GBP)**

Total Deposit Amount

### 47780.11

Deposit Date	Merchant Name	Merchant Number	Amount	D
10/04/2018 00:00	–	123456789	1760.02 GBP	73
10/04/2018 00:00	–	123456789	414.55 GBP	73
10/04/2018 00:00	–	123456789	2099.20 GBP	11
10/04/2018 00:00	–	123456789	88.45 GBP	54
10/04/2018 00:00	–	123456789	14.65 GBP	11
10/04/2018 00:00	–	123456789	131.40 GBP	73178846 000200000
10/04/2018 00:00	–	123456789	2.70 GBP	123456789 123456789
10/04/2018 00:00	–	123456789	36.99 GBP	123456789 123456789
10/04/2018 00:00	–	123456789	153.35 GBP	123456789 123456789
10/04/2018 00:00	–	123456789	15.45 GBP	123456789 123456789
10/03/2018 00:00	–	123456789	870.45 GBP	123456789 123456789

Available Columns

Search Available Columns

Add All

- Trace Number | +
- Company Number | +
- Origin DFI | +
- Entry Class | +

Active Columns 13 Selected

Search Active Columns

Remove All

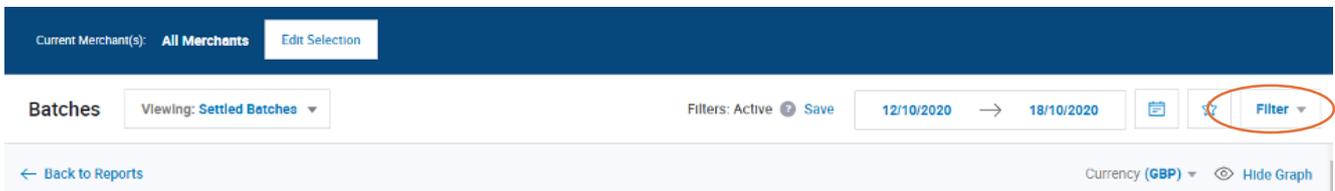
- Deposit Date | X
- Merchant Name | X
- Merchant Number | X
- Amount | X

Cancel Apply

Show 25 per page
Showing records 1–25 of 77
Prev Page 1 of 4 Next

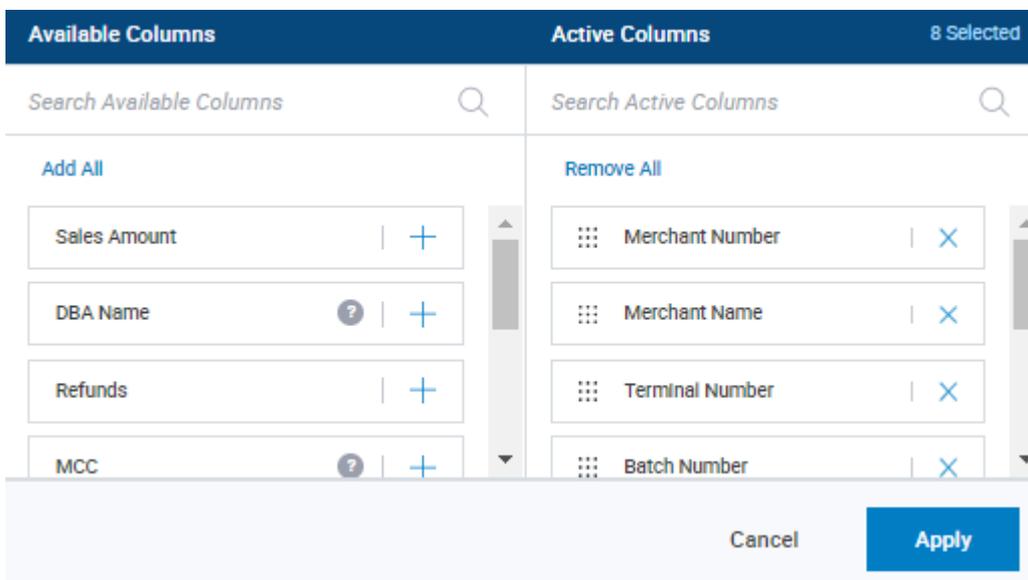
## Report Filters

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.



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.



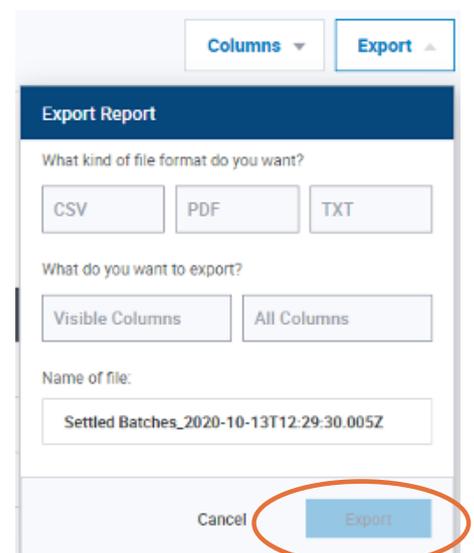
## Exporting Reports

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.



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.

globalpayments

REPORTING Current Merchant(s): 356 Selected Edit Selection

Default Reports Custom Reports Generated Reports

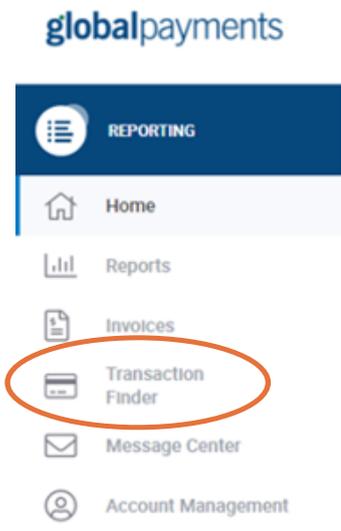
Reports Search Report Name Create Custom Report

GENERATED IN THE LAST 7 DAYS

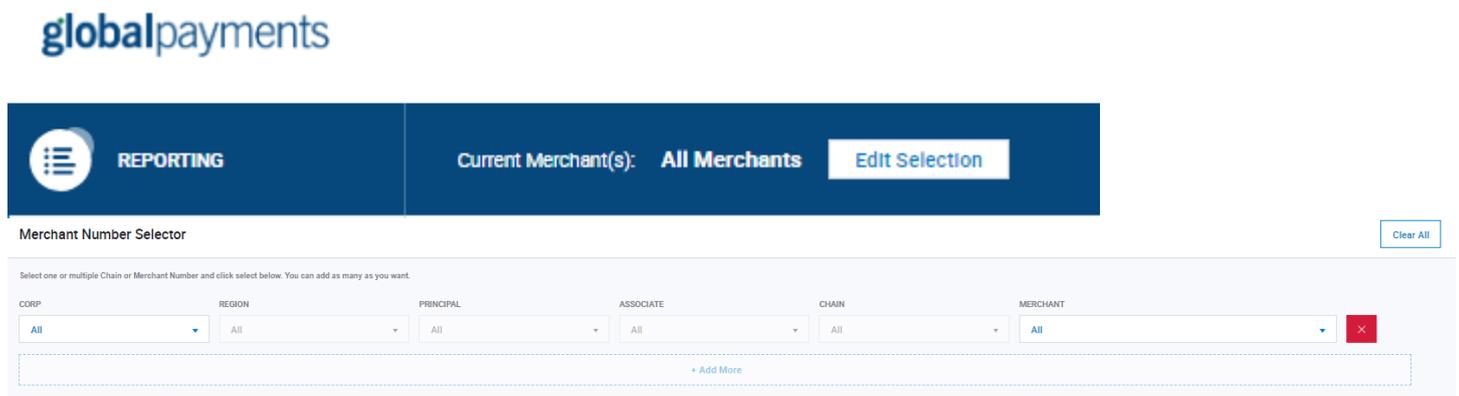
Settled Transactions - Schedule.csv <b>NEW</b>	Download
Generated 19/10/2020 Report: Settled Transactions	
Settled Transactions - Schedule.csv	Download
Generated 18/10/2020 Report: Settled Transactions	

# How to Troubleshoot Transactions

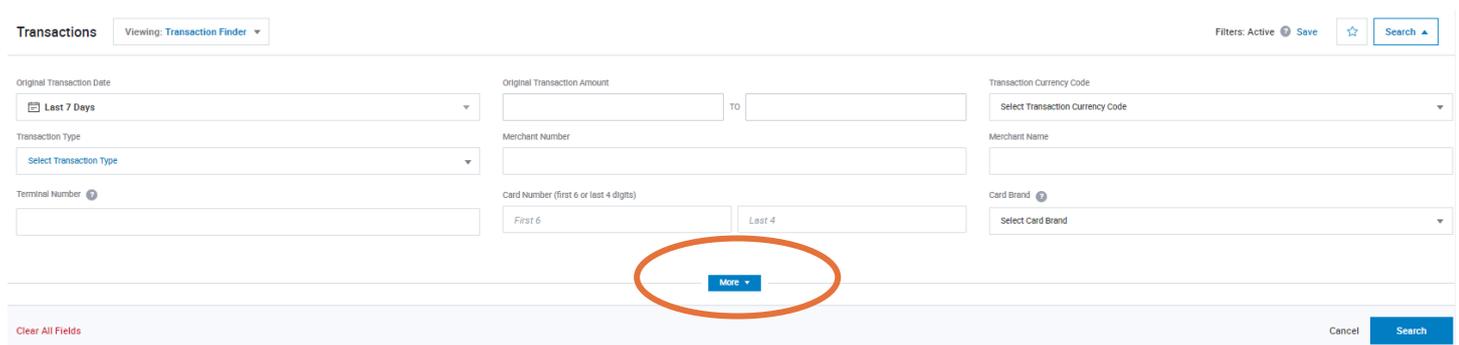
1. On the left menu bar, click Transaction Finder.



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:



4. 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:

Original Transaction Amount:  TO

Transaction Currency Code:

Transaction Type:

Merchant Number:

Merchant Name:

Terminal Number:

Card Number (first 6 or last 4 digits):

Card Brand:

Entry Mode:

Authorization Code:

Purchase ID:

Authorization Date:

Processing Date:

Deposit Date:

Response Code:

Acquirer Reference Number (ARN):

Payment Amount:  TO

Payment Reference Number:

Deposit Reference Number:

Original Transaction Reference Number:

Batch Control Number:

Chargeback Amount:  TO

Status:

Settlement Date:

Settlement Currency:

[Clear All Fields](#) Cancel Search

5. 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

Transaction Finder Showing records 1–25 of 11826 Currency (GBP) Columns 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	Mastercard	024983493	Actions
15405332	01/12/2019 08:18 pm	5.80 GBP	Sale	VISA	024983493	Actions
15405332	01/12/2019 07:05 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 03:30 pm	10.78 GBP	Sale	VISA	024983493	Actions
15405332	01/12/2019 12:05 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.

The screenshot shows the Global Payments Merchant Portal interface. The main content area displays a table of transactions for merchant 10181341. The table has columns for Merchant Number, DBA Name, Transaction Date, Original Trans., Transaction Typ., and Card Brand. The 'Transaction Finder' sidebar is open on the right, showing detailed information for a specific transaction, including DBA Name, Transaction Type, Response Code, Batch Control Number, Processing Date, Settlement Amount, Authorization Amount, Purchase ID, Chargeback Amount, Cardholder ID Method, Terminal Capability, Corporation, Region, Principal, Associate, Chain, Cardholder Activated Terminal, Response Downgrade Codes, and Validation Code.

Merchant Number	DBA Name	Transaction Date	Original Trans.	Transaction Typ.	Card Brand
10181341	TRAVELODGE BATH	05/04/2018	83.00	Sale	VISA
10181341	TRAVELODGE BATH	07/02/2018	154.00	Sale	MasterCard
10181341	TRAVELODGE BATH	09/27/2018	78.85	Sale	MasterCard
10181341	TRAVELODGE BATH	09/04/2018	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

## Application Drawer

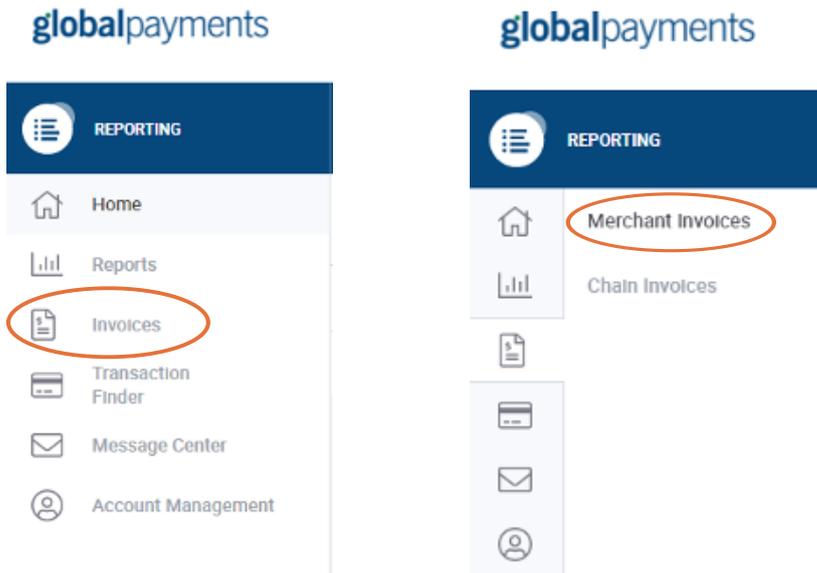
In order to access other applications from Merchant Portal, just click on the Application Drawer, which is located on the top right of the page.

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

The screenshot shows the Global Payments Merchant Portal interface, specifically the Reporting section. The 'Application Drawer' is visible in the top right corner, containing icons for various applications. The main content area displays the 'Reports' section, with options for 'My Reports' and 'Shared With Me'. A search bar for 'Search Report Name' and a 'Create Custom Report' button are also visible.

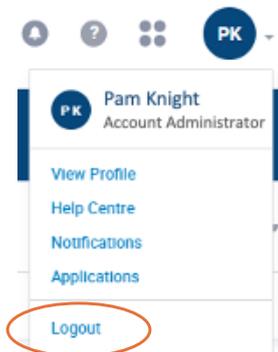
## How to Find Your Monthly Invoices

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.

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Issued November 2020**