NCR Payment Solutions Merchant Portal

Reference Guide
October 2020

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Section I

Merchant Portal

October 19, 2020 the merchant portal was updated to provide a fresh look on transactional data allowing enhanced usability, providing a snapshot of historical data and is laying the groundwork for future enhancements. A **new** "Landing Page Dashboard" is the first thing you will see to allow improved visibility to transaction reporting.

This document outlines the changes and gives you a quick walk-through for what to expect when the updates take place to the Merchant Reporting Portal.

What's New?

Below is a list of new things in the portal and a few features coming soon.

Portal Feature	Description	Readiness
Landing Page Dashboard	Provides transactional data in a 7-day snapshot view.	LIVE
Search by Card Type	Search transactions by each card type	LIVE
Data Filtering	Filter reporting on the screen to display only the transactions you want to see	LIVE
Self-Service Chargebacks	Emailed chargeback notifications, upload responses to the portal, online tracking at your fingertips in the merchant portal.	COMING 2021
Virtual Terminal	Process transactions on the go when needed in the Merchant Portal	COMING 2021

What to Expect

When you open the Merchant Reporting Portal at https://reporting.ncrpaymentsolutions.com/Login.aspx after the update you will notice a greeting on the landing page notifying you the website has changed. The update will require users to perform a password reset.

Note: Chrome is the recommended web browser.

Changing your password

Click on "Forgot Password?" link to request a new password. Enter the email associated with your account and continue through the steps provided via email.
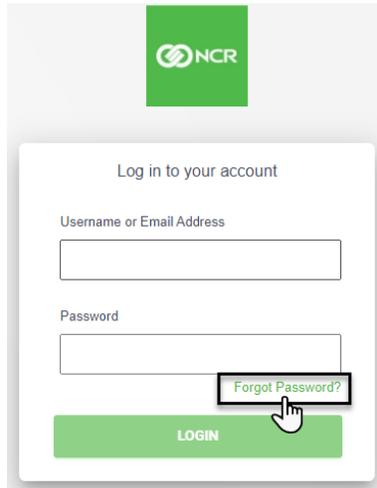
Once the new password is created, you can continue the login process and start navigating the updated merchant reporting portal.

Below are some helpful details about where the data currently used today can be accessed.

Welcome to the new landing page!

Here are some key things to know about navigating through the system

    a. Mouse over this area to open the navigation pane or click the toggle symbol to expand the menu. All reports are located here

    b. Amounts displayed on dashboard are interactive and will take you directly to the corresponding report when clicked
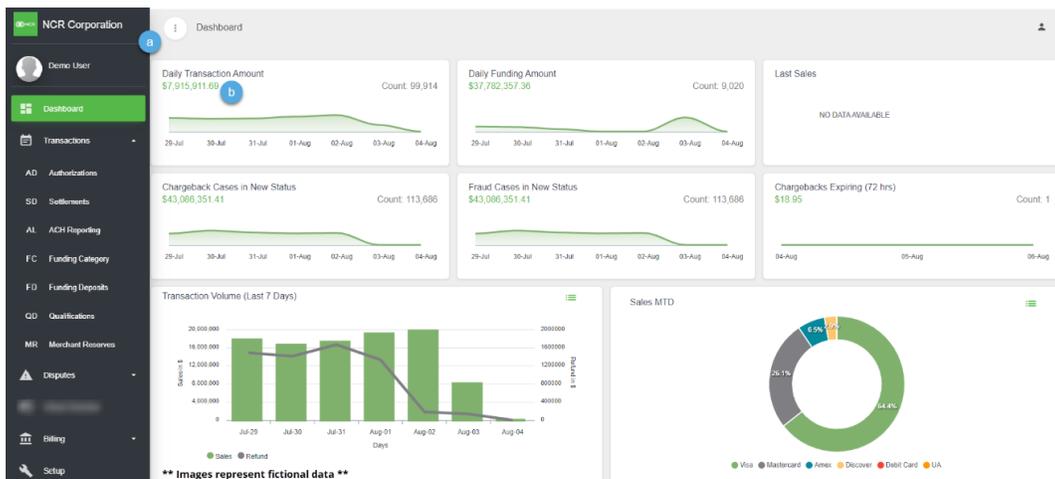
c. Toggle views between charts or data
d. Toggle to view different date ranges

Available Reporting and Updated Views

e. Reports are centrally located within the navigation pane
f. Search for transactions by card type when needed
g. Sort the data on screen without the need to export to find the transaction
h. Easily access the details of specific transaction with one click

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Chargebacks Reporting Overview

Chargeback summary reports allow merchants a high-level overview of chargeback counts and ratios for the current month. Adjusting the date range in the search criteria will provide a view of a specified date range if needed.

A. **Transaction (#)** – Number of transactions. The green text indicates a hyperlink; clicking the hyperlink will launch settlement details of all displayed transactions

B. **Chargeback (#)** – Provides a count of chargebacks. Clicking the green hyperlink will open specific transactions in dispute

C. **Count Ratio** – Ratio of chargeback counts to transaction counts MTD

D. **Transaction ($)** – Summary of transaction volume MTD

E. **Chargeback ($)** – Combined summary of all chargeback volume MTD

F. **Amount Ratio** – Ratio of Chargeback amounts to transaction amounts MTD