



REPORTING TOOL USER GUIDE

NAVIGATION

2016

VERSION 1.0



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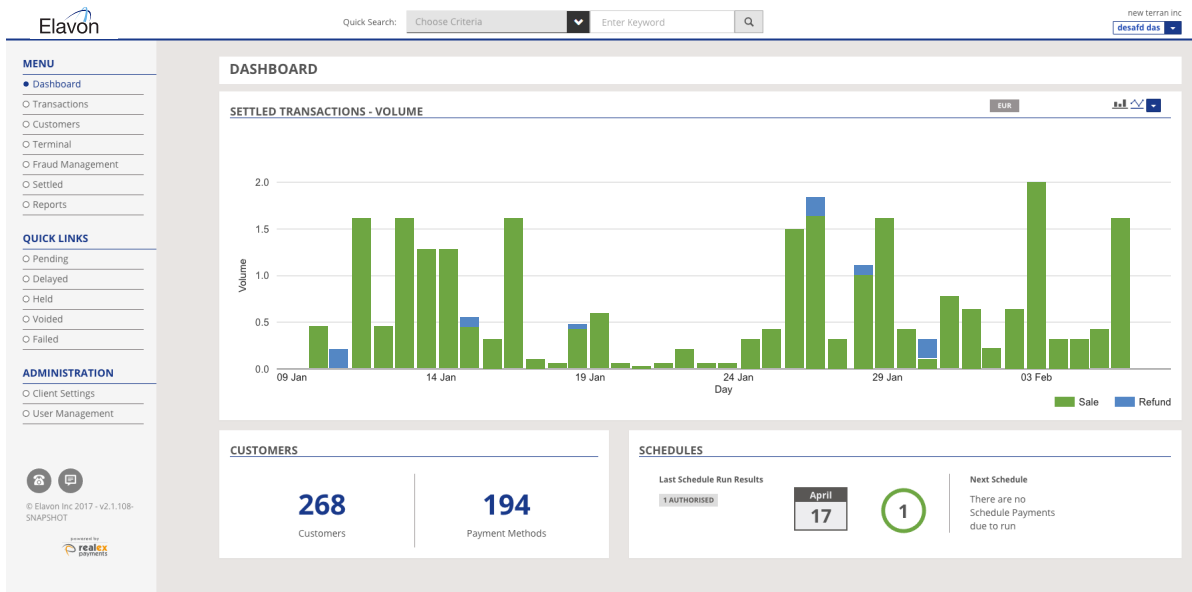
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1. NAVIGATION

Once logged in to the reporting tool, the navigation menu is located to the left side of the screen as below. The navigation menu displays all of the sections located within the reporting tool application.



1.1 QUICK LINKS

Field	Description
Pending	Pending allows you to view transactions that are awaiting settlement. All pending transactions will be sent to the bank for settlement depending on the batch time outlined by your acquiring bank. For more information on batch bank times please contact the Elavon Payment Gateway Support Team.
Delayed	Delayed allows you to view transactions which you have marked as requiring review before sending to the acquiring bank for settlement. You must manually Settle or Void transactions in this section.
Voided	This section allows you to search and view all voided transactions.
Failed	Failed allows you to view transactions which have been declined or failed. Please see the Elavon Payment Gateway Response Codes Guide.

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1.2 MENU OPTIONS

A further explanation of menu options can be found below:

Field	Description
Dashboard	The dashboard contains a chart which details your sales and refunds processed as well as showing recent alerts that have appeared on your account, the number of Customers saved within your application and any scheduled payments that have been set up with your customers.
Transactions	In this section you can access all transactions that have been processed.
Customers	This section allows you to store Customer details for recurring use. More information on this section can be found in the Customer User Guide.
Terminal	You can use the Terminal to process Sales, Refunds, Manual transactions and Card Verification transaction types. Note: Refund and Manual transaction types are not setup as default on your account. Manual Transactions need an authorisation code from your acquiring bank. To set up these transaction types please contact the Elavon Payment Gateway Support Team.
Fraud Management	In the Fraud Management section you can configure fraud rules to assess transaction data. The rules identify negative data, potential conflicts within a transaction's data and check each transaction for patterns in real time. A transaction score is then calculated based on the fraud rules which are enabled within the application.
Settled	This section allows you to view transactions which have been sent to the acquiring bank for settlement.
Reports	In the Reports section you can view reports that have been generated throughout the reporting tool. A history of the previous twenty five reports generated will be viewable in this section.

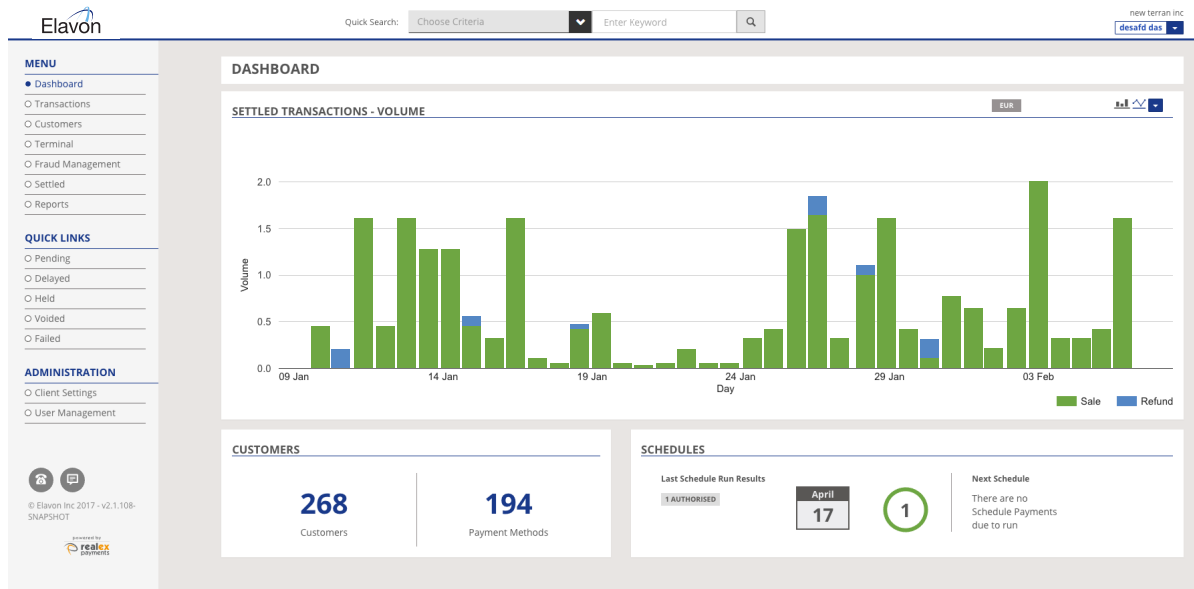
1.3 ADMINISTRATION

Field	Description
Client Settings	Client Settings allows you to change your password, amend the Timezone on the application as well as enabling you to add information to be displayed on your hosted payment page.
User Management	The User Management section allows you to add new users, view and edit existing users and enable user roles and permissions to both new and existing users of the application.

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2. THE DASHBOARD

The dashboard screen will appear once you have logged into the application.

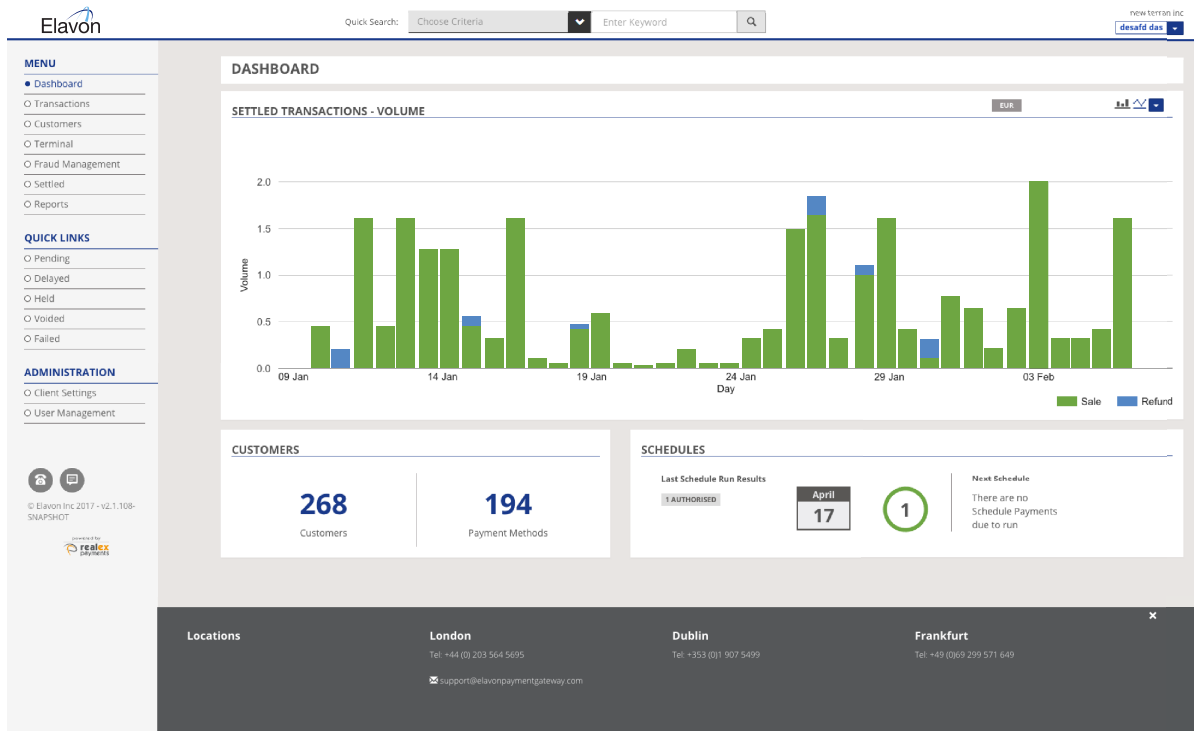


- The 'Settled Transactions – Volume' Chart located on the reporting tool dashboard details the volume of Sales and Refunds you have processed.
- The 'Customers' section will display the current number of Customer's stored within the application as well as the amount of payment methods you have stored against these Customer details.
- If your reporting tool application contains scheduled payments, the homepage also displays the 'Schedules' information. This section details the results in the last batch of scheduled payments which run. The detail will include how many schedules were authorised and how many failed if any. You will also be able to view when your next scheduled payment(s) will run.

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2.1 CONTACT US

The 'Contact Us' option on the bottom left of the menu bar is accessible from every screen. Once the 'Contact Us' option is clicked the Elavon Payment Gateway contact details will appear as below.



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2.2 FEEDBACK

To provide Elavon Payment Gateway with any comments or feedback you may have, click on the 'Feedback' button on the bottom left of the menu bar. This will display the screen below which will allow you to enter your feedback.

The screenshot shows the Elavon reporting tool interface. At the top, there is a search bar with 'Quick Search: Choose Criteria' and 'Enter Keyword'. The left sidebar contains a 'MENU' with options like Dashboard, Transactions, Customers, Terminal, Fraud Management, Settled, and Reports. Below the menu are 'QUICK LINKS' (Pending, Delayed, Held, Voided, Failed) and 'ADMINISTRATION' (Client Settings, User Management). The main dashboard area is titled 'DASHBOARD' and features a 'SETTLED TRANSACTIONS - VOLUME' bar chart for the currency 'EUR'. The chart shows transaction volume from 10 Jan to 04 Feb, with green bars for 'Sale' and blue bars for 'Refund'. Below the chart are two summary cards: 'CUSTOMERS' with a value of 268 and 'SCHEDULES' with a value of 194. A 'FEEDBACK' modal is open in the foreground, displaying the user's name 'desafd das (jorge.desilvestro@realexpayments.com)', a 'Type' dropdown menu, an 'Area' dropdown menu, and a 'Comment' text area. The modal includes 'CANCEL' and 'SUBMIT FEEDBACK' buttons.



GOT ANY QUESTIONS?
LET US KNOW

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