globalpayments

Customer Engagement

Gift+Rewards Portal
Quick Reference Guide

Global Payments Gift+Rewards provides you with easy-to-use tools to help you keep tabs on your program. Through the Gift+Rewards Portal, access the following reports:

- **Daily Reports** – for daily, store-level audits of all orders and terminals as well as real-time transaction information
- **Settlement** – for reconciling company—and specific stores'—settlement amounts
- **Sales Summary** – for a summary and details of a particular store's orders
- **Terminal EOD** – for store-specific end-of-day audits

Store-Level Reports
Daily Report
Settlement
Sales Summary
Terminal EOD

Additional Gift+Rewards reports are available to store owners, including:

CSR Activity – for reports on Customer Service Representative (CSR) activity

Account Activity – for details of a specific card or alias, including balance and all transactions

Account Search – for locating particular accounts (cards)

Order Detail – for a detailed report of all data associated with an order ID

Customer Activity – for details on a particular customer's card-related actions

Customer Care
CSR Activity
Account Activity
Account Search
Order Detail
Customer Activity

General Navigation

In any given report, click «view» in the report's "Detail" column for further information, such as the following:

TRANSACTION DATE ↓	LOADED	REDEEMED	CASH OUT	NET ADJUSTMENTS	NET AMOUNT
02/21/18	0.00	0.00	0.00	2,286.88	2,286.88
02/23/18	1.00	0.00	0.00	0.00	1.00
03/07/18	0.00	-100.00	0.00	0.00	-100.00

Sort data results by clicking on any column header in blue (e.g. LOADED).

Most reports allow you to download comma separated (CSV) files by clicking «download csv file» on the results screens, to import your data into applications such as MS Excel.

Daily Reports

"Daily Reports" provides a daily, store-level audit of all orders and terminal activity and includes up-to-the-minute transaction information. "Daily Reports" can be used to reconcile gift card activity with POS and financial reports.

To run a Daily Report, follow these steps:

DAILY SALES AUDIT SUMMARY

CURRENCY	LOAD AMOUNT	LOAD COUNT	REDEEM AMOUNT	REDEEM COUNT	CASH OUT AMOUNT	CASH OUT COUNT	REVERSAL AMOUNT	REVERSAL COUNT	NET AMOUNT	TOTAL COUNT	DETAILS
TERMINAL#: 1											
CAD	0.00	0.00	-30.00	1.00	0.00	0.00	0.00	0.00	-30.00	1.00	«view»

DAILY SALES AUDIT SUMMARY

TYPE	TOTAL SALES	SALES COUNT	TOTAL VOIDS	VOID COUNT	NET AMOUNT	DETAILS
TERMINAL#: 1						
STOREDVALUE	30.00	1	0.00	0	30.00	«view»
STORE TOTAL	30.00	1	0.00	0	30.00	«view»

1. Click on the "Daily Reports" link under Store-Level Reports
2. Once the Daily Reports screen opens, enter the store number in the Store field.
3. Select a date for your Daily Report.
4. Click "Go" to generate report results.

Settlement Reports

Your settlement reports provide store- level settlement data, which can be used to reconcile corporate and specific stores' settlement amounts.


SETTLEMENT SUMMARY

Store: TEST XENIAL G&R ALL CARDS, **Merchant:** 9990077971655704, **Chain ID:** 9990077971655704, 3381 Steeles Ave E Suite 200, Toronto ON M2H3S7 CA **Store Currency:** CAD
Selected Date Range: March 14, 2018 - March 20, 2018

CURRENCY	LOADED	REDEEMED	CASH OUT	NET ADJUSTMENTS	NET AMOUNT	DETAIL
CAD	5.00	0.00	0.00	0.00	5.00	«view»

To run a Settlement report, follow these steps:

1. Click the "Settlement" link under Store-Level Reports.
2. Once the Settlement screen opens, enter the store number in the Store field, or enter "all" for all stores. (You may also search by other available search criteria.)
3. Select a time period or date-range for your Settlement report.
4. Click "Go" to generate report results.

Sales Summary Reports

Get a quick, multi-level overview of all orders in a store by running a Sales Summary report.


SALES ACTIVITY SUMMARY

TYPE ↓	TOTAL SALES	TRANS COUNT	TOTAL VOIDS	TRANS COUNT	NET AMOUNT	DETAILS
STOREDVALUE	15	2	0	0	15	«view»
TOTALS	15	2	0	0	15	«view»

To run a Sales Summary report, follow these steps:

1. Click the "Sales Summary" link under Store-Level Reports.
2. Once the Sales Summary screen opens, enter the store number in the Store field, or enter "all" for all stores. (You may also search by other available search criteria.)
3. Select currency for which you would like details.

   NOTE: CAD will show transactions using Canadian Dollars. For loyalty "points" activity, select Points.
4. Select a time period or date-range for your Sales Summary report.

5. Click "Go" to generate Sales Summary report.

End-of-Day (EOD) Reports

Quickly obtain a summary of any store's activity, or run a detailed EOD report for an order-by-order breakdown of activity.

To run a Terminal EOD report, follow these steps:

1. Click the "Terminal EOD" link under Store-Level Reports.
2. Once the EOD screen opens, enter the store number in the Store field, or enter

"all" for all stores. (You may also search by other available search criteria.)

3. Select a date for your Terminal EOD report.
4. Under Detail, select summary or detailed.
5. Click "Go" to generate Terminal EOD report results.

Gift/Loyalty Detailed Audit Report

ORDER ID 160429630000169077
07/16/17 03:52:52 PM CAD 50.00
ACTIVATE
PAID BY CASH

D 160429630000172617
7 05:09:01 PM CAD 25.00

D 160129660000202207
7 05:54:39 PM CAD 67.80

Grand Totals

RD TOTALS
Amount: CAD 50.00
ls: 0 Amount: CAD 0.00
s: 2 Amount: CAD 92.80
Voids: 0 Amount: CAD 0.00
) (42.80)

POINTS TOTALS
Amount: 0
ls: 0 Amount: 0
s: 0 Amount: 0
Redeem Voids: 0 Amount: 0
Net: 0

Data For: Jul 16, 2017
Summary Report

Run Date: Jul 19, 2017
Run Time: 12:35:16 PM

Store Grand Totals

GIFT CARD TOTALS
Adds: 1 Amount: CAD 50.00
Add Voids: 0 Amount: CAD 0.00
Redeems: 2 Amount: CAD 92.80
Redeem Voids: 0 Amount: CAD 0.00
Net: CAD (42.80)

LOYALTY POINTS TOTALS
Adds: 0 Amount: 0
Add Voids: 0 Amount: 0
Redeems: 0 Amount: 0
Redeem Voids: 0 Amount: 0
Net: 0

Customer Care Reports

Customer Care reports are available for store-owners. If Customer Care reports do not appear in your Global Payments Gift

ACCOUNT SUMMARY: 5022440500000000006 - ACTIVE CARD
MERCHANT: 9990077971655704 CHAIN ID: 9990077971655704

REGISTRATION INFORMATION		
Card Type: Not Available	**Activated:** Jan 24, 2018	**Last Used:** Feb 12, 2018

CARD BALANCES	AVAILABLE	EXPIRED	LIFETIME
POINTS	5	0	10
CAD	476.50	0.00	502.51

ACCOUNT ACTIVITY

Selected Date Range: January 1, 2018 - March 20, 2018
Single Page Result: (Rows 1 thru 20)

DATE ↓	STATUS	TYPE	CSR	NOTES	STORE	CURRENCY	AMOUNT	BALANCE
01/23/18 04:14 PM	DECLINED	STANDALONE NOTE	CSR_BETSY		- ONLINE -	NONE	0	0
01/23/18 04:14 PM	DECLINED	STANDALONE NOTE	CSR_BETSY		- ONLINE -	NONE	0	0
01/24/18 09:59 AM	APPROVED	REPLENISH			0000077971655704	CAD	1.00	1.00
01/24/18 10:00 AM	DECLINED	REPLENISH			0000077971655704	CAD	0.00	1.00
01/24/18 10:01 AM	APPROVED	REPLENISH			0000077971655704	CAD	499.00	500.00
01/24/18 10:01 AM	APPROVED	REDEEM			0000077971655704	CAD	-25.00	475.00

Reports menu, you have not been granted rights to review these reports.

CSR Activity

Your CSR Activity report provides a detailed report on any of your Customer Service Representative (CSRs).

To run a CSR Activity report, follow these steps:

1. Click the "CSR Activity" link under Customer Care.
2. Once the CSR Activity screen opens, enter the CSR's name in the Last Name or CSR Username fields.
3. Select a time period or date-range for your CSR Activity report.
4. Click "Go" to generate CSR Activity report results.

Account Activity

An account can be either a card number or a registered phone number/alias. Your Account Activity report provides an account's details, including balances and a list of all transactions.

To run an Account Activity report, follow these steps:

1. Click the "Account Activity" link under Customer Care.
2. Once the Account Activity screen opens, enter an account number in the Account Number field.
3. Select a time period or date-range for your Account Activity report.
4. Click "Go" to generate Account Activity report results.

Account Search

Your Account Search report allows you to locate a particular account by the full number or last 4 digits.

MATCHING ACCOUNT LIST

Data as of: March 20, 2018
Single Page Result: (Rows 1 thru 1)

ACCOUNT NUM	ALIAS	CHAIN	MERCHANT	STATUS	ACTIVATION DATE (GMT)	CARDHOLDER	LAST USE DATE (GMT)
5022440500000000006				ACTIVE	01/24/18 02:59 PM	NOT REGISTERED	02/12/18 05:03 PM

To run an Account Search report, follow these steps:

1. Click the "Account Search" link under Customer Care.
2. Once the Account Search screen opens, enter an account number (card number or registered phone number/alias) in the Account Number field, or search by entering the last 4 digits in the Last 4 Digits field.
3. Click "Go" to generate Account Search report results.

Order Detail

Your Order Detail report provides detailed data for any particular order.

To run an Order Detail report, follow these steps:

1. Click the "Order Detail" link under Customer Care.
2. Once the Order Detail screen opens, enter an order number in the Order Number field.
3. Click "Go" to generate Order Detail report results.

Customer Activity

Your Customer Activity report provides you with any of your customer's card-related activity.

To run a Customer Activity report, follow these steps:

1. Click the “Customer Activity” link under Customer Care.
2. Once the Account Activity screen opens, search for your customer by last name, email address, or phone number.
3. Select a time period or date-range for your Customer Activity report.
4. Click “Go” to generate Customer Activity report results.