BUSINESSVIEW
QUICK START GUIDE

WWW.GLOBALPAYMENTSINC.CO.UK

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1. INTRODUCTION

1.1 Background

BusinessView is a secure data retrieval and management information tool that provides 24 hour online access to reporting and transaction information. It provides:

- 24/7 secure browser-based application with unique User ID and password protection
- Assists reconciliation efforts with next-day, online transaction data, streamlining operations by eliminating time-consuming manual lookups
- Ability to research, manage or conduct multiple searches, using a variety of search fields saving you valuable time
- Allows multiple users and locations to be set-up for your business with selected access control by you
- Minimises training requirements with an intuitive interface and search features available through the portal
- Exportable data which you can use based on your business needs

This Quick Start Guide provides a brief introduction on BusinessView after you have successfully received or generated your login credentials.

1.2 User Roles

There are three different types of user roles and each user is assigned access accordingly to their roles and responsibilities within the organisation. Therefore the home screen of each user will vary from role to role.

1. **Admin Role** – Each set-up has a nominated admin user who will manage the online account settings for the business. The admin user can add or delete users, reset passwords, add unique hierarchies or Merchant IDs within their or other user's profile within their set-up.

2. **Management Role (Manager)** – This role enables you to view information at hierarchical level, so you can view information of all your sites registered with Global Payments.

3. **Merchant Role** – With this role you have set parameters so you can view designated Merchant IDs which are assigned to you by your admin user.

1.3 What You'll Need To Login?

1. Login Details - Username and Password
2. Merchant ID or hierarchy details if you have multiple Merchant IDs. Within the Reports Page you will need your Merchant ID handy to run reports at merchant level.
3. Add the URL to your favourites or bookmark so you have the link available.
4. Ensure you add the URL within your compatibility view settings.

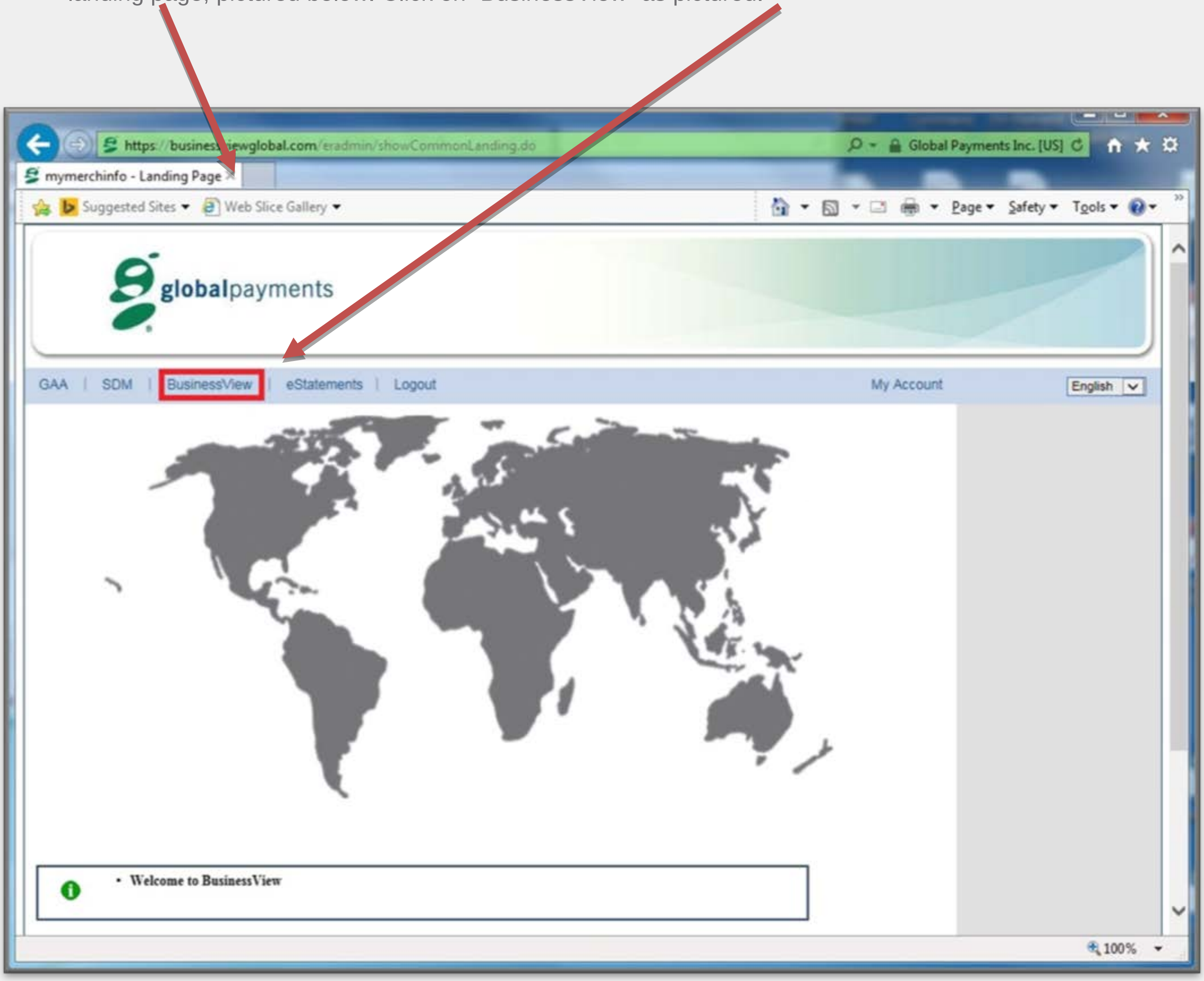
2. LOGGING INTO BUSINESSVIEW

2.1 BusinessView Login Page

To log into BusinessView, enter “https://businessviewglobal.com/UK” into the address bar on your browser. The BusinessView login page as pictured below will request an entry of a username and a password.

2.2 MyMerchInfo Landing Page

Following the entry of a valid username and password combination, you will land on "MyMerchInfo" landing page, pictured below. Click on "BusinessView" as pictured.



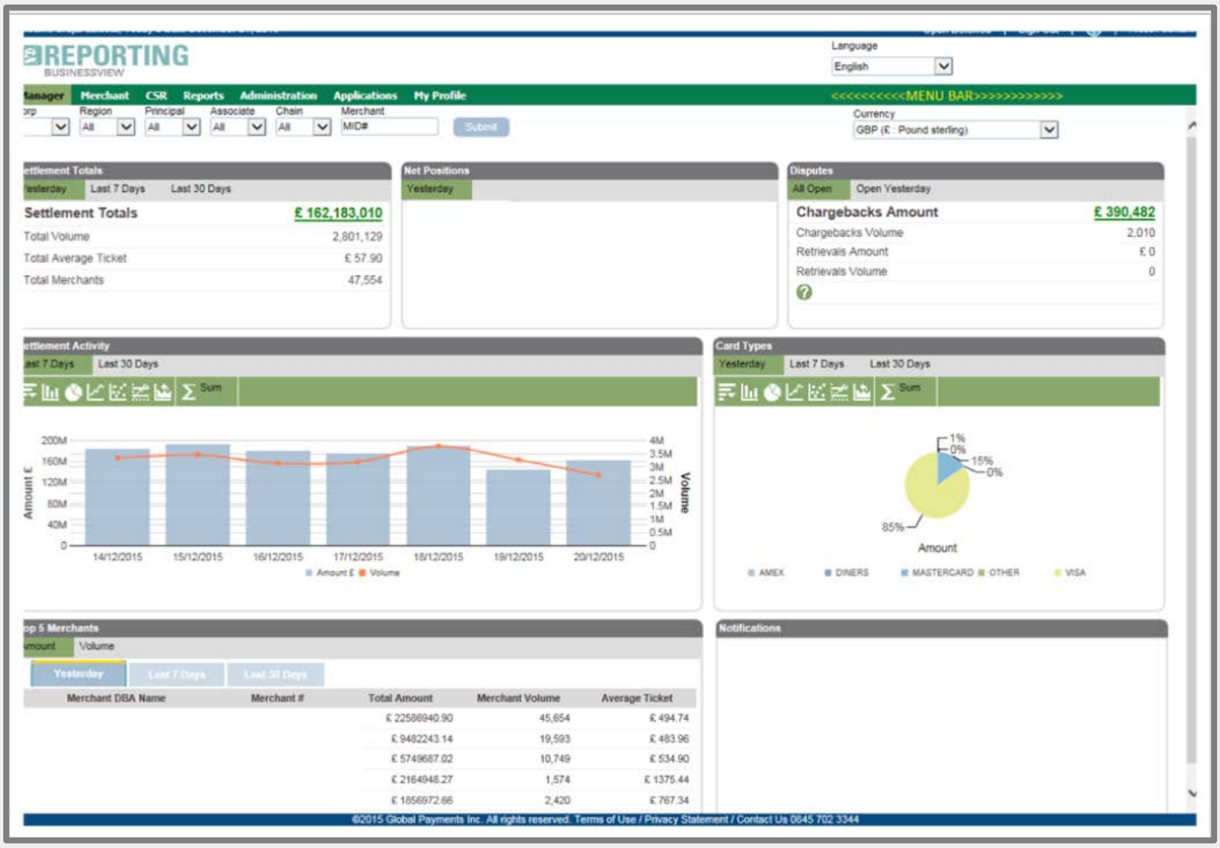
3. BUSINESSVIEW HOME SCREEN

Following the login process you arrive at the initial BusinessView home screen as demonstrated below.

As previously mentioned, the home screen will vary depending on the access the user is granted

All landing pages have a menu bar near the top of the page as shown in the picture below. The menu bar offers a variety of options to the user. The options offered will also vary depending on the privileges associated with the profile of the user.

For the purpose of this guide we will focus on the Manager Level access.



3.1 Overview Of Manager Landing Page

The Manager landing page consists of the following widgets:

I. **Settlement Totals**

- The Settlement Totals widget displays the totals of settled transactions taken over the course of last 24 hrs, 7 days or 30 days.
- Click on one of the duration tabs at the top of the widget to select the time frame for the data. The default time frame is highlighted.

II. **Net Positions**

- The Net Positions widget displays the data for the earnings from the previous day any collections and or reserves being withheld.

III. **Disputes Widget**

- The Disputes Widget provides a view of all open chargebacks and retrievals that have been accrued for the reporting duration.
- To view the current Disputes Summary report, click on the linked Sterling amount. Click on one of the duration tabs at the top of the widget to select the time frame for the data. The default time frame is highlighted.

IV. **Settlement Activity Widget**

- The Settlement Activity widget displays the totals of settled transactions. Click on one of the duration tabs at the top of the widget to select the time frame for the data.
- The default time frame is highlighted. Click on the horizontal bar graph icon to open the Widget Chart submenu for customisation options.
- To customise the chart, use Advanced Chart to open the Chart/Rollup Tool. Click Original Chart to return to the default settings.

V. **Card Types Widget**

- The Card Types widget displays the volume amount for each major card brand.
- Click on one of the duration tabs at the top of the widget to select the time frame for the data.
- The default time frame is highlighted.

VI. **Top 5 Merchants Widget**

- The Top 5 Merchants widget displays the top five merchants based on the selection of either tab: Amount or Number of Transactions (Volume).

- The default criteria is highlighted. Click on one of the duration tabs at the top of the widget to select the time frame for the data.

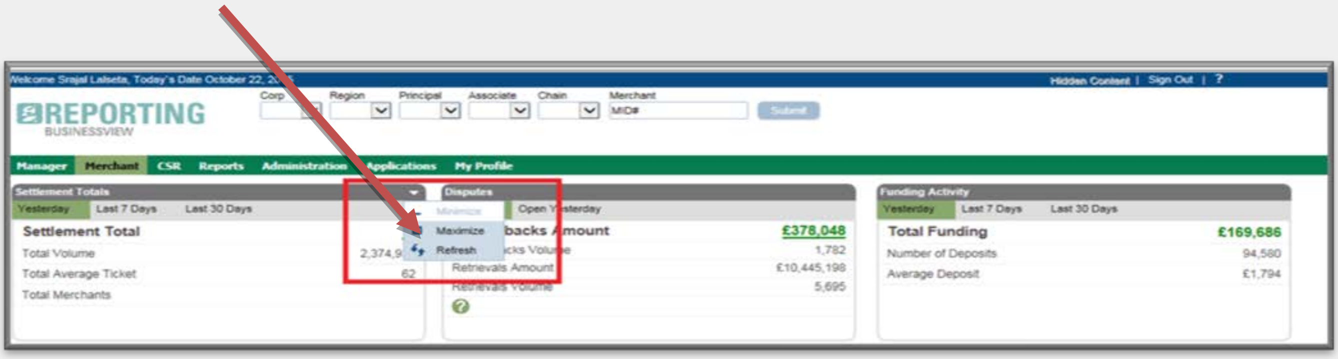
- The default time frame is highlighted.

VII. **Notifications Widget**

- The Notifications widget displays messages and system alerts for the user. The most recent notifications appear in a different font color.

3.2 Widgets

The widgets have a built-in submenu that allows you to change the viewing options. To access the submenu, hover over the upper right corner of the widget and click on the dropdown arrow.



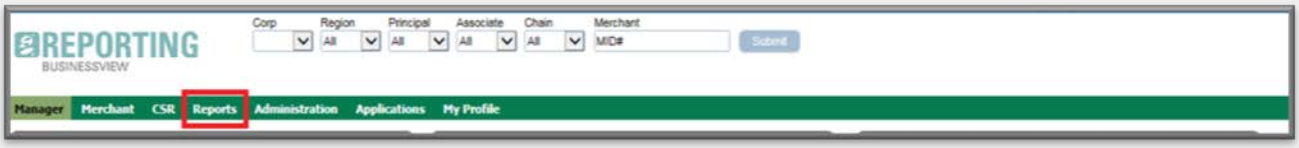
- **Minimise** – Hides the content within the widget; the widget remains on the Dashboard.
- **Maximise** – Expands the widget to fill the entire Dashboard.
- **Restore** – Returns a widget to its original form. This option only appears if the widget is minimised or maximised.
- **Refresh** – Reloads the content within the widget.
- **Hide** – Removes the widget from the Dashboard temporarily.
- **Delete** – Removes the widget from the Dashboard permanently.

4. REPORTS

The Reports section enables you to:

I. Drill down reports using a wide range of search fields.
II. Wide range of fields available to customise your reports.
III. Download reports

To get started, click on the "Reports" tab on the BusinessView menu bar.



4.1 Initial Reports Page

The initial BusinessView reports page has two sections, as shown in figure 4-1. The "**Reports Listing**" section is on the left and **"Canvas"** section on the right.

To View Or Download Reports:

1. Click on the arrow next to reports within report listing section on the left hand side or double click on **Reports**.

2. Once you have clicked on **Reports** or on the arrow it will expand and list different reporting options.

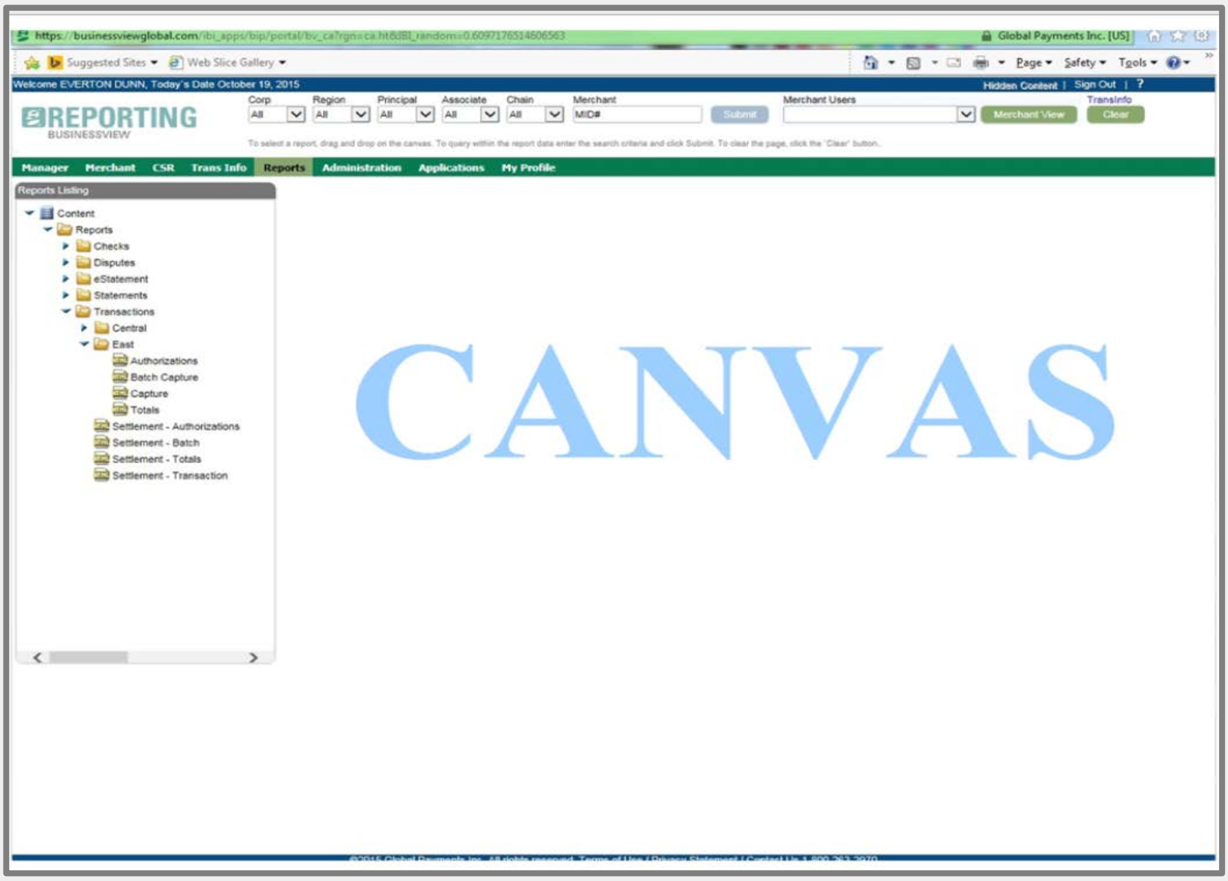
There are wide range of customisable reporting available to meet your needs, some of the popular reports are:

No.	Report Name
1	Settlement – Authorisations
2	Settlement – Batch
3	Settlement – Totals
4	Settlement - Transaction

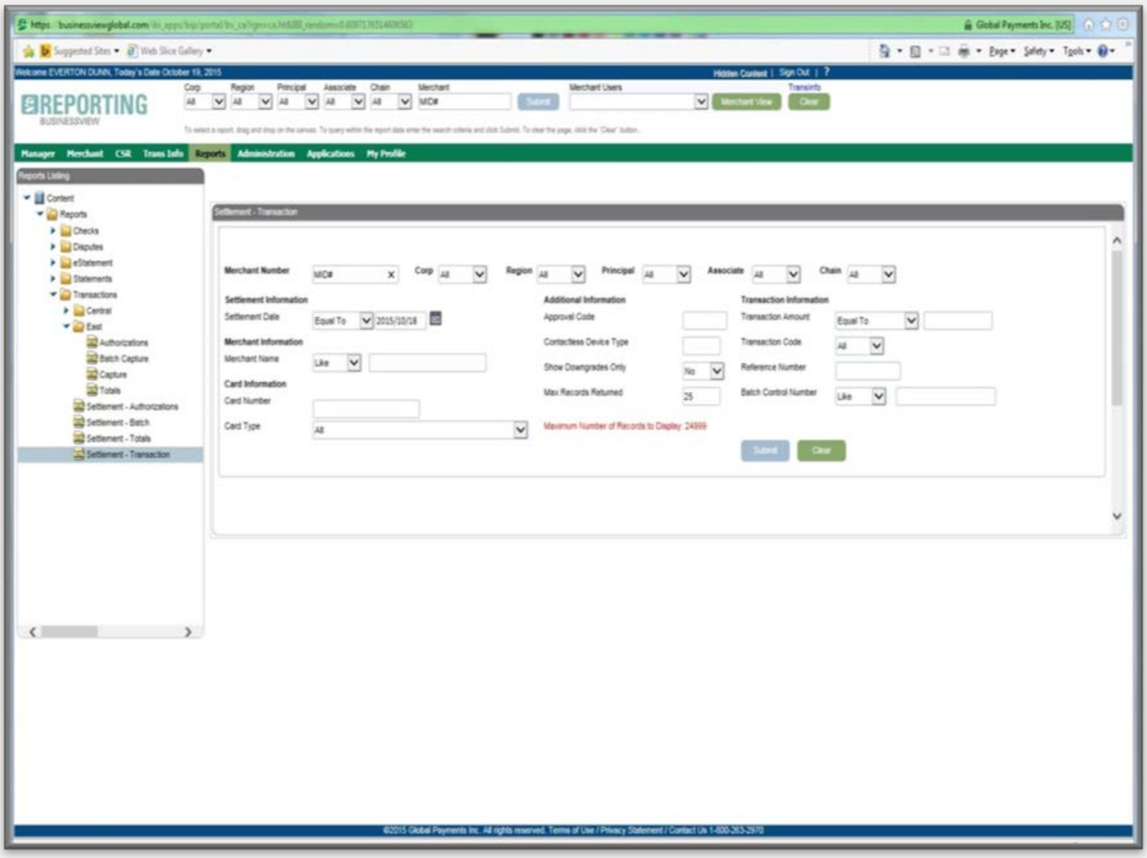
4.2 Reports Query Page

To pull a report you need to complete the following steps in order to download the report:

1. Within the Reports section click on the appropriate folder in the Reports Listing widget.
2. Drag the desired menu item from the Reports Listing on to the report canvas i.e. blank page.
3. Re-size the resulting Report widget.
4. Enter the search fields required, as there are a number of search parameters such as Date Range, Card Types, Number of Records, and Merchant ID.
5. Once the desired search parameters are entered, click on submit to generate the report.

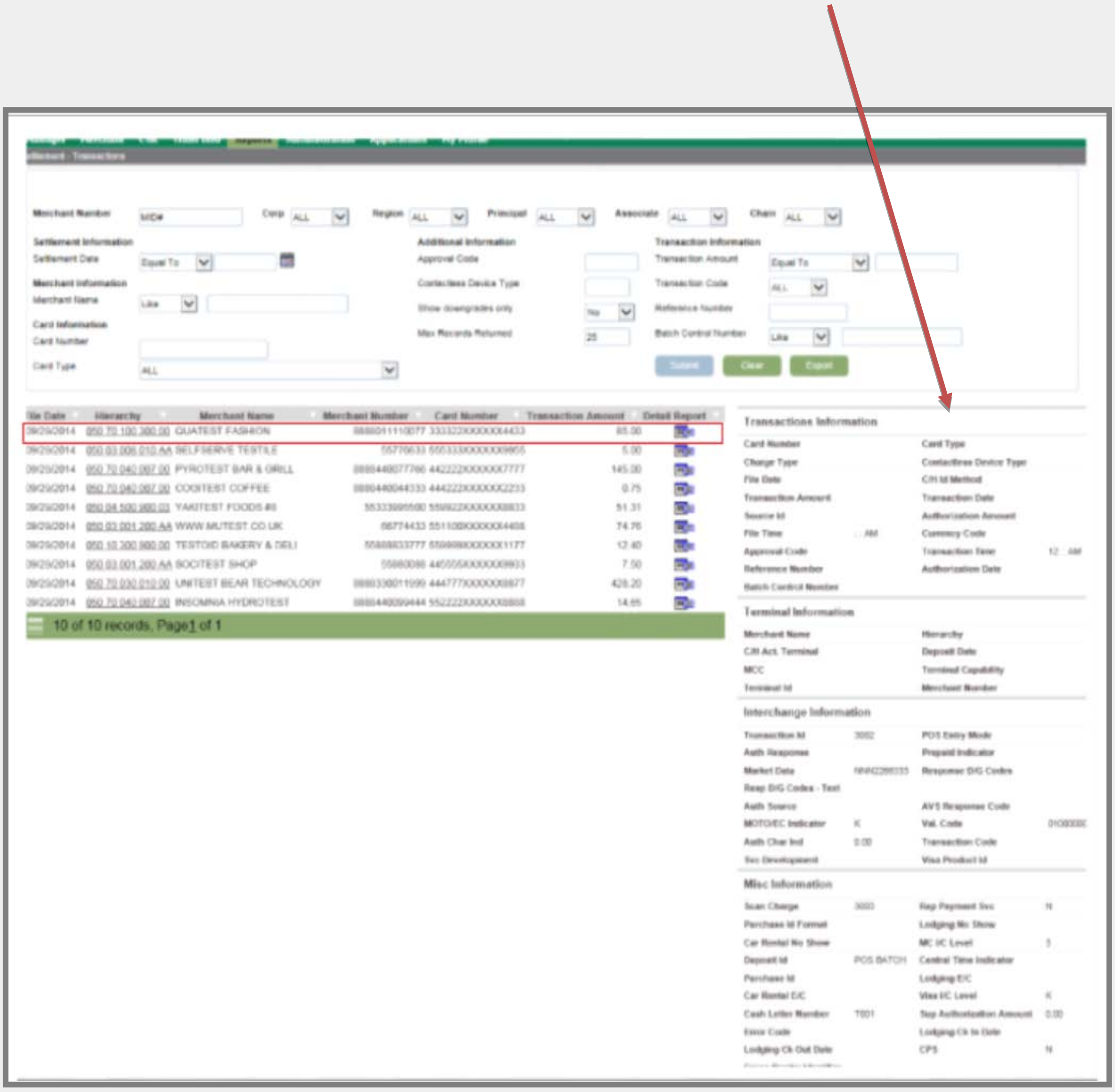


Note: The below image is of a Settlement Transaction Report.



4.3 Example Report

An example of a typical report is shown in the image below. The individual report results items (e.g. transactions) are listed on the left. Details of the highlighted transaction are shown on the right.



4.4 Why Export Reports?

BusinessView enables you to download and save the reports as Excel or CSV files. There are various advantages to have the reports in CSV or Excel format:

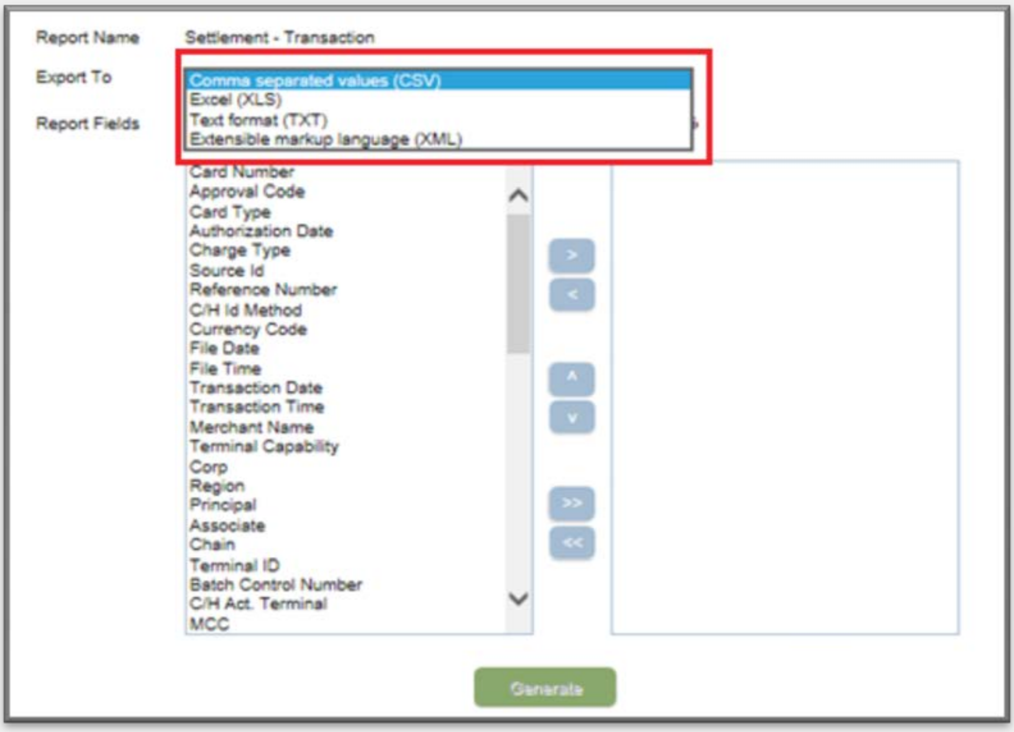
i. Save them on your drive and refer back to them when you need to.
ii. Analyse data to give you an in-depth understanding of how your business is doing
iii. Use the information to plan future sales and marketing campaigns

4.5 How To Export Reports

Once you have completed the steps mentioned in section 4.2, click on the Export button.

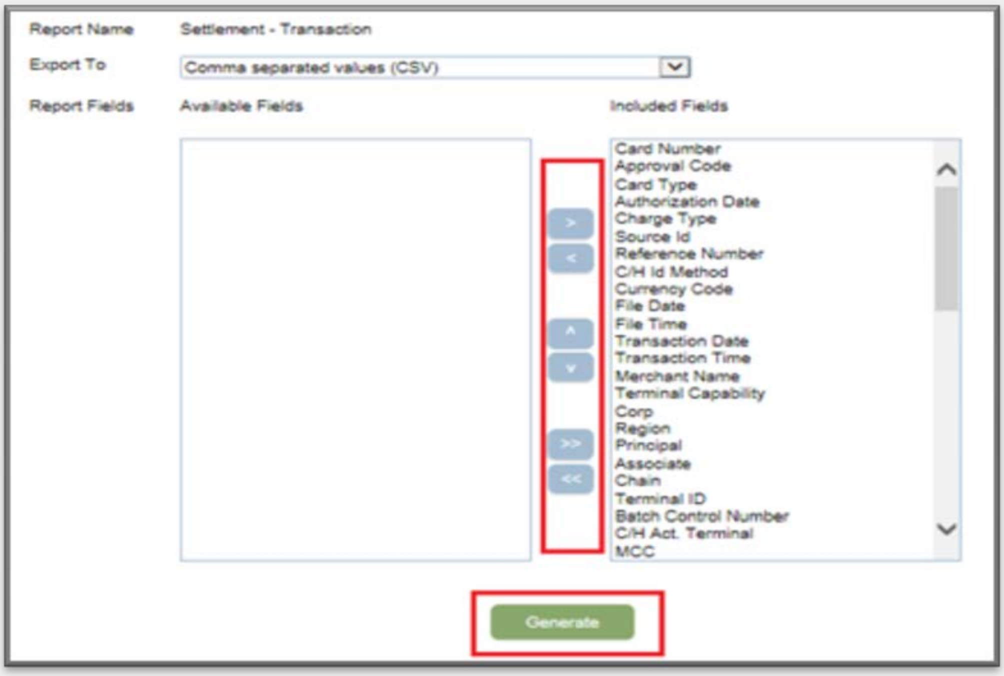
4.5.1 Format Of Reports

The image below will be presented in a new window. This section gives you the opportunity to customise your report by choosing your own fields to build the report.



4.5.2 Report – Export – Fields

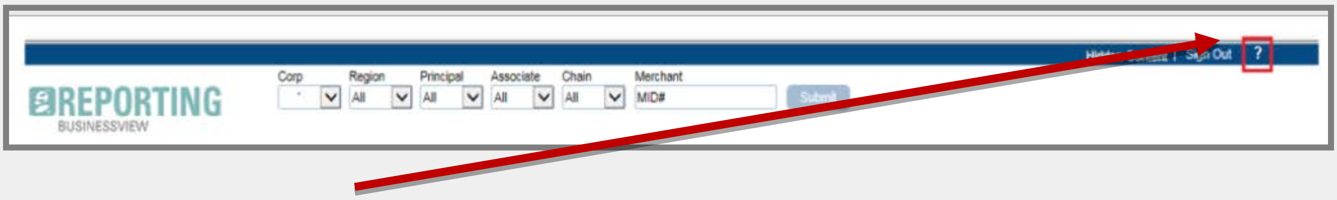
Once you have chosen the fields click on **Generate** as highlighted in below:



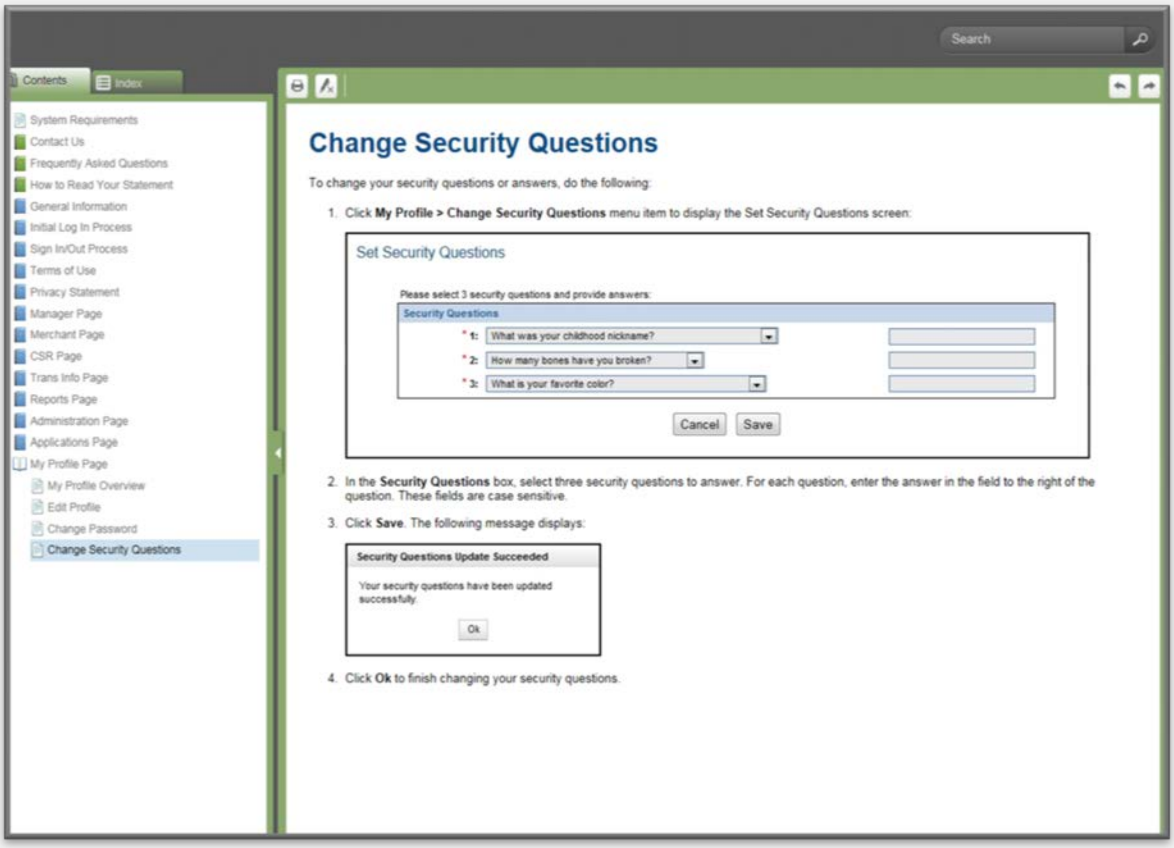
Once you have clicked on the **Generate** button it will open in a new window in CSV/Excel.

5. HELP FUNCTION

There is an inbuilt user guide on the system. This is a more detailed BusinessView guide on how to carry out various functions within the portal. To access the comprehensive Online User Guide click on the question mark (?) sign that is located on the top right corner of the blue menu bar as illustrated below.



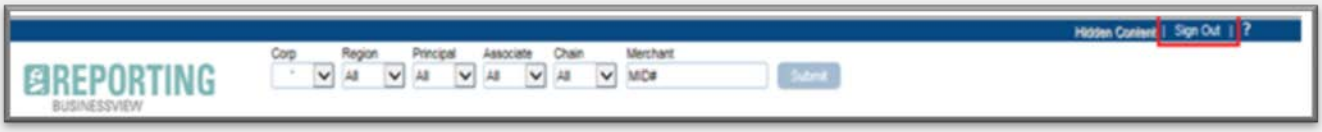
After clicking on the question mark symbol, the below screen will be displayed in a new window.



Note: Remember this document is only a Quick Start Guide. Within BusinessView there is an inbuilt extensive step by step guide.

6. SIGNING OUT OF BUSINESSVIEW

To sign out of BusinessView, click on “Sign Out”, located on the top right-hand side of the blue bar, on the top of every BusinessView page. “Sign Out” is shown within the red rectangle on the image below.



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