NCR Payment Solutions
Using the NCR Payment Gateway Portal

Last Updated: March 16, 2021

Gateway Login

Before you can log into the NCR Payment Gateway Portal, you will need your user name, 6-digit numeric Company ID and default password. If you do not have this, contact your NCR Representative.

1. Open a web browser and enter https://hspclient.servereps.com/ServerEPS.
2. Enter your **User Name**.
3. Enter your 6-digit numeric **Company ID**.
4. Enter your **password**.
5. Click **Submit**.

   If you forget your password, you will need to send an email to connectedpayments.support@ncr.com or contact your NCR Payment Gateway root administrator to request a password reset.

Changing Your Password

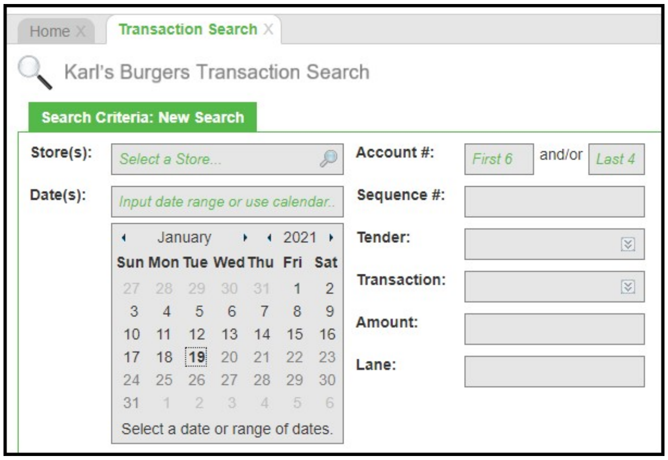
1. Click on your name in the upper right corner of the screen.
2. Select **Change Password**.

3. Enter your **Current Password**.
4. Enter a **New Password. *Note***: Password must meet requirements listed on screen.
5. Enter the password again in the **Confirm Password** field.
6. Click **Change Password**.
7. A confirmation message appears indicating your password change was successful.
8. Click **OK**.
9. On the Change Password tab, click the **X** to close the tab.

Transaction Search

Use the Transaction Search feature to view and manage credit card transactions processed through the gateway.

1. Click on **Transaction Search** at the top of the screen.



2. In the New Search area, click the **Store(s)** field to view a specific store or select **Search All Stores...** at the bottom of that list.
3. In the Date(s) area, click on the beginning date of the search. ***Note***: If the search is for a single day, then skip Step 4.
4. Click on the **ending date** of the search. All dates from the beginning and ending dates are highlighted on the calendar.

   Additional search parameters including first 6 or last 4 of the Account # (or credit card number), amount, lane and Advanced Search Options can be entered.

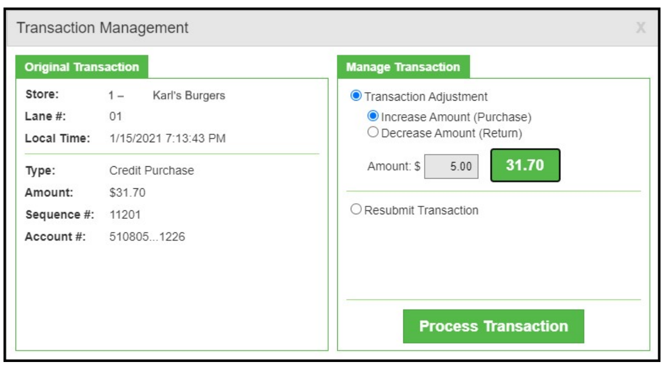
5. Click **Search**.
6. Search results are displayed with the most recent transaction at the top of the list based on the Local Date & Time column.
7. Click any **column heading** to sort the list of transactions based on that column.
8. Use **Hide Details** and some of the report columns will be hidden.

9. Use **Export** to export the page of transaction data displayed on screen to an Excel workbook.
10. Use **Print** to print the page of transaction data displayed on screen.
11. Use **Advanced Export/Print** at the bottom of the list of transactions to select the data to be exported or printed.
12. Click on a **transaction** to view the details of that transaction.

Transaction Management

To increase or decrease the transaction amount or resubmit the transaction for approval after it had been previously declined, use the **Manage** option in the Transaction Detail screen.

1. In the transactions list, click on the **transaction** to be managed.
2. Use the scroll bar on the right to move down to the **Manage** option.
3. Click **Manage**.
4. The **Transaction Management** screen appears.

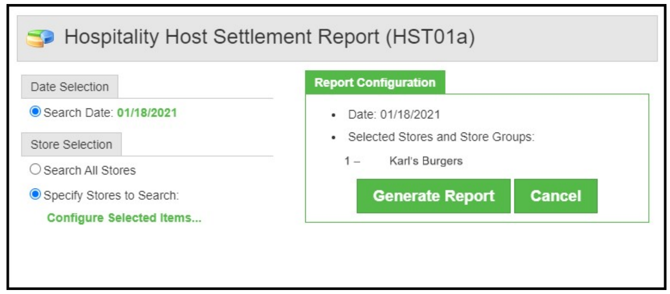


5. In the **Manage Transaction** area, select **Increase Amount (Purchase)** to increase the transaction by a specific dollar amount or **Decrease Amount (Return)** to reduce the transaction by a specific dollar amount.
6. In the **Amount** field, enter the dollar amount to change the transaction by, not the adjusted total amount. For example: The original transaction amount was $31.70, and it should be $36.70. Enter $5.00 (not $36.70) in the Amount field.
7. Click **Process Transaction.**

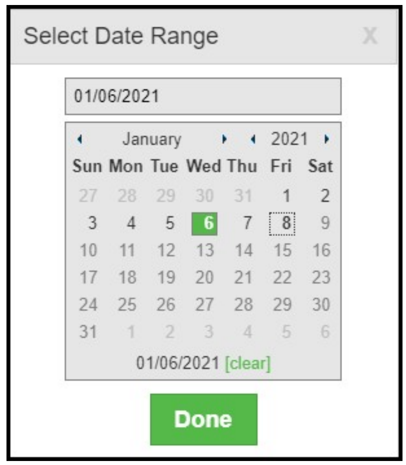
An adjustment made to a transaction will be settled the next day; it will appear on the cardholder's statement as a separate entry and the adjustment does not go back to your POS.

Gateway Reports

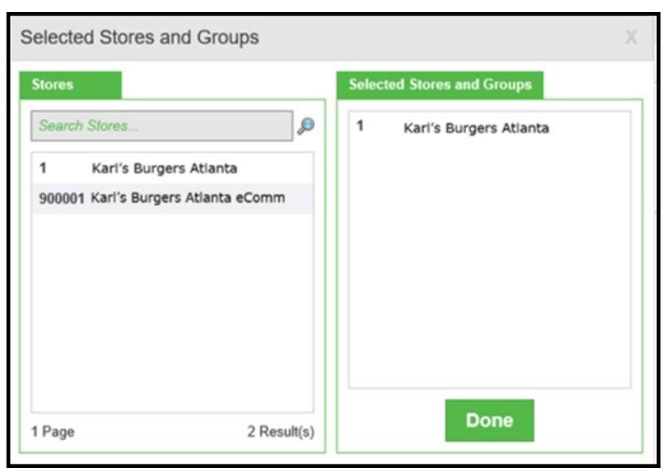
1. Hover over the **Reports** option at the top of the screen and select **Gateway Reports**.
2. Click on the desired report from the **Available Reports** list.



3. Use the **Date Selection** to select a single date or a date range.
4. To change the date, click the **date displayed** to view the calendar.
5. Click **Clear** at the bottom to clear the current date selected and click the desired date.



6. To select a date range, select the **beginning date** and the **ending date**. All dates from the beginning to the ending are selected.
7. Click **Done**.
8. Use the **Store Selection** to have all stores included on the report or select a single store or group of stores to be included.



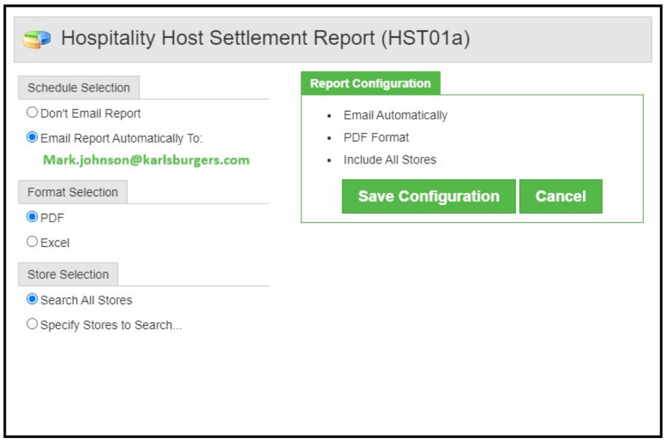
9. Click **Generate Report** to view the report.

10. The report is displayed on screen. Use the toolbar at the top of the report to navigate to different pages of the report, save the report to your local drive, and print the report.
11. After viewing the report, click the **X** on the Report Viewer tab at the top of the screen.

Schedule Reports

Use the Schedule Reports to have specific NCR Payment Gateway Portal reports sent to your email daily.

1. Hover over the **Reports** option at the top of the screen and select **Schedule Reports**.
2. Click on the **desired report** from the list of Schedule Reports.
3. In the Schedule Selection area, select **Email Report Automatically to**.



4. If your email address has not been configured, click **Configure Email Address** and enter your email address.
5. In the **Format Selection**, select **PDF** or **Excel**.
6. In the **Store Selection**, select **Search All Stores** or use **Specify Store to Search...** to select specific store(s).
7. In the **Report Configuration** area, verify the selections made.
8. Click **Save Configuration**.

Key Gateway Reports to Use

- **Host Settlement Report (HST01)** or **Hospitality Host Settlement Report (HST01a)**—Use this report to verify the credit card batch settlement took place. The report displays totals for each card type that the Gateway reported, that the Processor reported and if there were any variances between them.

- **Approved Transactions Log (TRN01) or Approved Transactions Log with Department/ User (TRN01a)**—Sites that do not do tip adjustments can use this report to verify all approved transactions are ready for settlement.

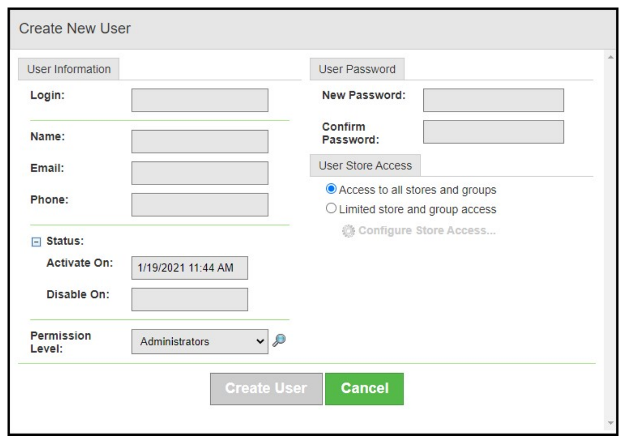
- **Approved Transactions Log with Tip Amount (TRN01b)** or **Hospitality Approved Transactions Log with Tip Amount (TRN01d)**—Sites that do tip adjustments to pre-authorized transactions before settlement will use any of these reports to verify all tips have been entered.

- **Declined Transactions Log (TRN02)**—Use this report to see the transactions that were declined and the reason they were declined.

Adding Users

Your user permissions determine if you are able to add users to the NCR Payment Gateway Portal. If you are not able to add users, please contact your NCR Representative or Administrator to have users added.

1. Hover over the **Administration** option at the top of the screen and select **User Management**.
2. Current users is displayed. Click **New User.**
3. In the **Login** field, enter the user name the user will use to log into the NCR Payment Gateway Portal.



Be sure to follow the same user name format as the other users already created.

4. Enter their **Name, Email** and **Phone Number**.
5. Status displays the date & time user was created.
6. Select a **Permission Level**.

These are user groups that have permissions set on what users assigned the permission level can do while logged into the NCR Payment Gateway Portal.

7. Enter a user's temporary password in the **New Password** field and enter it again in the **Confirm Password** field.

User will be prompted to change their password when they log in the first time.

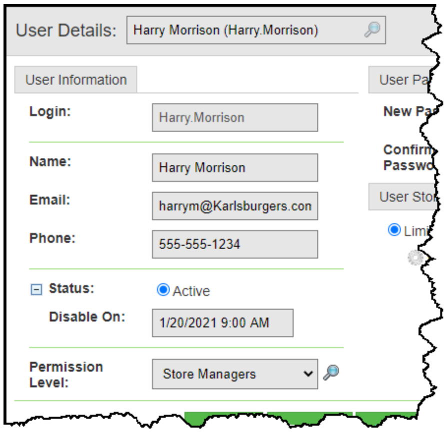
8. If the user is to have access to all stores, select **Access to all stores**.

9. If the user is to have access to specific stores, select **Limited store and group access** and then select **Configure Store Access…** to assign stores.
10. Click a **store name** in the Stores list to add it to the Selected Stores and Groups panel. To remove the selected store, click on the store name in the Selected Stores and Groups panel.
11. Click **Done**.
12. Click **Create User**.
13. Click **OK** on the User created successfully message.
14. Click **Close**.

Disabling a User

A user's access can be disabled to disallow them from logging into the NCR Payment Gateway Portal. The user's access becomes disabled on the date posted for the user. Your user permissions will determine if you can disable a user.

1. Click the **user's name** from the Current Users list.
2. In the Status area, enter the **date and time** the user's login will become disabled and then click **Save.**



3. Click **OK** on the User saved successfully message.
4. Click **Close** to return to the Current Users list.
5. The **Active until..** status for the user is displayed on the Current Users screen.

In the future, the disabled user can be re-activated by entering the date of re-activation in the **Activate On** field in the Status area for the user.

Deleting a User

Deleting a user removes the user from the NCR Payment Gateway Portal. Your user permissions will determine if you can delete a user.

1. Click the **user's name** from the Current Users list.
2. Click **Delete**.
3. Click **OK** on the message to confirm the deletion of the user.
4. Click **OK** on the User deleted successfully message.
5. The user is removed from the Current Users list.