NCR Payment Solutions
Using the NCR Payment Gateway Portal

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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 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 can be entered including first 6 or last 4 of the Account # (or card number), amount, lane and advance options can be entered.
5. Click **Search**.
6. Search results are displayed with 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 **Export** to export the page of transaction data displayed on screen to an Excel workbook.
9. Use **Print** to print the page of transaction data displayed on screen.
10. Use **Advanced Export/Print** at the bottom of the list of transactions to select the data to be exported or printed.
11. 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. Click on the **transaction** to be managed from the transactions list.
2. Use the scroll bar 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 $21.63, and it should be $26.63. Enter $5.00 (not $26.63) in the Amount field.
7. Click **Process Transaction**

Adjustments made to a transaction will be settled the next day; they will appear on the cardholder's statement as a separate entry and the adjustment does not go back to Aloha 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 Repor**t 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.

Schedule Reports

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, click on **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 store(s).
7. Click **Save Configuration**.