NCR Payment Solutions
Using the NCR Payment Processor Portal

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Processor Login

Before you can log into NCR Payment Processor Portal, you will need the URL (website), Username and Password from your NCR Payment Solutions Welcome letter. If you do not have this, contact our Assist department at 1.800.834.4405 or by emailing assist.payments@ncr.com.

1. Open a web browser and enter https://reporting.ncrpaymentsolutions.com.

   Chrome web browser is the recommended browser when accessing the portal.
2. Enter your **Username** or **Email Address**.
3. Enter your **Password**.
4. Click **LOGIN**.

Changing Your Password

1. Click the profile icon in the upper right corner of the dashboard.
2. Select **Change Password**.
3. Enter your **Current Password**.
4. Enter your new password in the **New Password** field.
5. Enter the password again in the **Confirm Password** field.
6. Click **Update**. The Payment Processor Portal login screen appears, and you will need to use your new password to login.

Forgot Password

Use the **Forgot Password?** option on the Login screen to submit a request to reset your password.

1. On the NCR Payment Solutions Portal login screen, click the **Forgot Password?** Link.
2. In the Password Reset Request screen, enter your **Email** or **Username** for your account.
3. Click **Request**.
4. Click **OK** to continue.
5. You will receive a **Change Password Request** email from noreplyncrpayments@artegocloud.com.
6. In the email you receive, click the link provided to reset your password. (Link expires in 30 minutes).
7. Type your **new password** on the Reset Your Password screen, and type again to confirm it.
8. Password requirements are:
   - Password should contain 8 to 250 characters.
   - Password should contain a combination of uppercase and lowercase letters, numerals and symbols.
   - New password should not be the same as your last password.
9. Click **Submit**.

Dashboard

The landing page of the NCR Payment Processor Portal is an interactive dashboard that provides a centralized view of processing information.

- You can quickly launch reports from the amounts displayed on the dashboard.
- Hover over graphs to see amounts for specific days.
- In some of the boxes displayed on the dashboard, you can click on the menu icon in the upper right corner of those boxes to switch between charts or lists.
- Use the navigation panel on the left to access reports, statements, chargebacks and other features.

Transaction Reports

Use **Transactions** to access reports including Authorizations, Settlements, ACH Reporting, Funding Category, Funding Deposits, Qualifications and Merchant Reserves.

1. In the navigation panel on the left, expand **Transactions** and select the desired report.
2. Click the **Search records** field on the right.
3. Enter **search parameters** for the selected report.
4. In the **Start Date** field, click the calendar icon to select a date from the calendar.
5. In the End Date field, click the **calendar icon** to select the end date for the report from the calendar.
6. Click **Search**.
7. The selected report data is displayed on screen.
8. Click **any column** heading to sort the data in ascending order based on that heading (click the heading again to sort the data in descending order).
9. Use the **Show 10 Entries** option at the bottom of the screen to change the number of entries per page.

10. Use the **navigation buttons** at the bottom of the screen to view different pages of the report.
11. Use the **Export** button at the top of the screen to export the report data to an MS Excel workbook and it appears as a tab at the bottom of the screen.
12. Click the **tab** to open the workbook in MS Excel. The workbook can be saved to your local system for future access.

Statements

Statements will include the fees paid for the credit card transactions processed for a reporting month. Your statement will be published and available within 5 business days after the end of the month.

1. In the navigation panel on the left, expand **Billing** to access **Statements**.
2. Click the **Search records** field on the right.
3. Enter the **From Month** and **Year**.
4. Enter the **To Month** and **Year**.
5. Click **Search** and a list of monthly statements appears.
6. Click the **PDF** icon on the right to view the statement.
7. The statement opens in a separate browser window.
8. Use the **Printer** icon in the upper right portion of the screen to print the statement.
9. Use the **Download** icon to save the statement to your local system.
10. Close the **browser window** to close the statement.

Chargebacks

A chargeback is a dispute of a transaction initiated by the cardholder because of a card processing error, fraudulent transaction or other reason. The disputed transaction amount is debited from your merchant bank account at the time of reporting. Use the Chargebacks report to view chargebacks that have been reported.

1. In the navigation panel on the left, expand **Disputes** to access **Chargebacks**.
2. Click the **Search records** field on the right.
3. Enter the **Start Date** and **End Dates**.
4. Click **Search**.
5. A summary of chargebacks by card type is displayed for the dates selected.
6. Click the **Chargeback #** to view the specific chargebacks.
7. Click the **Card Number** to view the chargeback details.
8. Click the left arrow icon next to Merchant Name at the top of the screen to return to the previous screen.

Virtual Terminal

Use Virtual Terminal to process a credit transaction when a pin pad/terminal is not available.

1. In the navigation panel on the left, expand **Virtual Terminal** and select **Virtual Terminal**.
2. Enter required information indicated with an (*) asterisk next to the field name.
3. Click **Submit** to process the transaction.
4. A **Transaction Receipt** will appear when the transaction is complete.
5. Click **PDF** to download a printable version of the receipt.
6. Click the **Email** icon to send the receipt to the cardholder. The cardholder email must be entered when entering the transaction to use the Email feature.

Voids/Refunds can be performed on the original sale within the Transaction Reporting menus (Authorizations or Settlements).

Virtual Terminal History

Use History to view Virtual Terminal transactions that have been processed.

1. In the navigation panel on the left, expand **Virtual Terminal** and select **History**.
2. Click the **Search records** field on the right.
3. In the **Start Date** field, click the calendar icon to select a date from the calendar.
4. In the End Date field, click the **calendar icon** to select the end date for the report from the calendar.
5. Enter additional search parameters as needed.
6. Click **Search**.
7. Virtual Terminal transactions that occurred based on the search parameters will be displayed.
8. Click the 3-dot icon on the right side of the transaction line to view the transaction receipt.
9. Click **PDF** to download a printable version of the receipt.
10. Click the **Email** icon to send the receipt to the cardholder. The cardholder email must be entered when entering the transaction to use the Email feature.