



# Payments Portal User Guide

Version 1.0 – 01 March 2023

# Notice

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## Version history

Version	Date	Modification(s)
1.0	March 01, 2023	<ul style="list-style-type: none"><li>▪ Analysis and content merging of deprecated Payments Portal documents</li><li>▪ Content conversion to the Planet template</li><li>▪ Minor content enhancement</li></ul>

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# Table of contents

<b>Version history</b>	<b>3</b>
<b>Table of contents</b>	<b>4</b>
<b>1. Overview</b>	<b>6</b>
1.1 Login	6
1.2 Home Page	8
1.3 Top Menu	10
<b>2. Payment Gateway</b>	<b>11</b>
2.1 Overview	11
2.2 Authorizations	11
2.1 Transactions	12
2.2 Completions	14
2.3 Floor Limit	14
2.4 Create a New Refund or Payment	15
<b>3. Online Payments</b>	<b>17</b>
3.1 Overview	17
3.2 Transactions	17
3.3 Refunds	18
3.4 Pay By Link	18
3.4.1 Add Pay By Link	19
3.4.2 Pay By Link detail fields	20
3.4.3 Pay By Link optional detail fields	21
<b>4. Virtual Terminal</b>	<b>22</b>
4.1 Overview	22
4.2 Transactions	22
4.1 Authorize	23
4.2 Pay	23
4.3 Settle	24
<b>5. Token</b>	<b>25</b>
<b>6. My Services</b>	<b>26</b>
6.1 My Reports	26
6.1.1 Report types	26
6.2 My Invoices	29

6.2.1	My Invoices highlights	30
6.3	Master Account	31
6.3.1	Overview	31
6.3.2	Create Basic User – “View Only” access	32
6.3.3	Create Advanced User – “Read and Write” access	33
6.3.4	Online Payments (website reservations)	34
6.3.5	Edit user account settings	35

# 1. Overview

The payments portal provides a comprehensive view of all payment data processed through Planet gateway services.

We provide all merchants with a user-friendly web portal to manage transactions and reconcile data with reporting tools.

The portal is accessible via any online device and offers instant access to real-time transaction data. With up to 3 years of history, the portal supports faster and more accurate reconciliation to support business management.

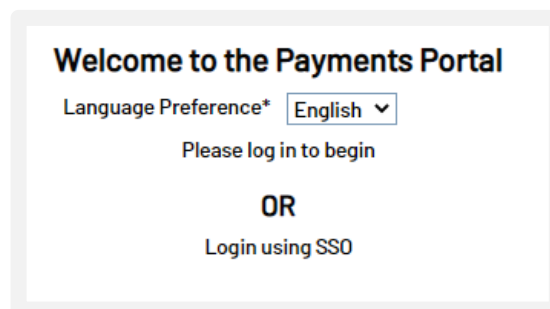
The portal is supported by the following minimum browser requirements:

- Google Chrome
- Firefox
- Edge
- Opera

## 1.1 Login

- 1) Access the portal via the internet using the URL:

<https://www.3cportal.com/portal/index.htm>



- 2) Click on **Please log in to begin** or **Login using SSO** depending on your company setup SSO (Single Sign On) is only available for specific merchants and would need to be configured by Planet Customer Support team. Most general users should ignore SSO and click **Please log in to begin**.
- 3) Enter the Username and Password provided by Planet Customer Support team.



- Passwords require a minimum of ten (10) characters with at least one numeric, one alpha Character, and one special character (~!@#\$\$%^&\*\_{ }[]:; " '<>.,?/).

- Passwords will expire after 90 days. The user will be forced to change the password upon expiration and log in with the new password. New passwords must be different from the previous twenty-four (24).
- Passwords cannot be changed more than once per day.

Welcome to the Payments Portal.  
For more information about Planet and our solutions visit  
[www.planetpayment.com](http://www.planetpayment.com)

### LOGIN

CustomerID

Username

Password

Remember me

**LOG IN**

[Reset password](#) [Change password](#)

If a user has an active account but has forgotten their password, it can be reset by clicking **Reset password**. If a user has forgotten their username, they should contact Planet support. The following error message will pop up.

**The login details are incorrect. Please retry or contact Planet Support.**

### RESET PASSWORD

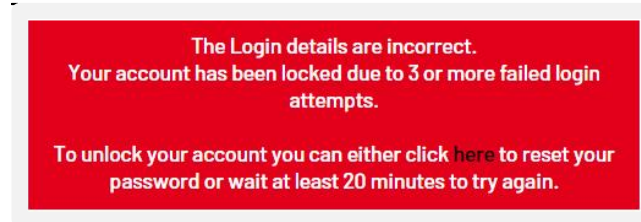
Customer ID

Username

Registered Email Address

**RESET PASSWORD**

Customer ID info must be entered on this login screen. This information will be sent by the master user at the merchant location for the first login with credentials. If incorrect, the user will be prompted to retry or contact Planet support. Users are locked out of the portal after three failed sign-in attempts and must reset their password. Contact support.help@planetpayment.com for assistance.

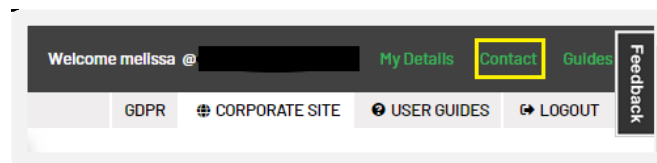


## 1.2 Home Page

The Home Page displays menu options to access information about Payment Gateway, Online Payments, Virtual Terminal, Tokens, and My Services. Each category has menu options specific to that category. These are described in detail throughout the guide.

On the Home Page, the user and merchant's name will appear in the banner at the top right of the screen. Select "Contact" at the top right corner to locate customer support information by country.

Additional User guides can be found on the top of the right side of the page.





**CUSTOMER SUPPORT**

---

**Europe**

<b>Western Europe</b>	Austria	+43 720 880 792
	Belgium	+32 2888 1633
	France	+33 179 972 112
	Germany	+49 1805 352 204
	Italy	+39 024 070 8296
	Portugal	+352 2020 2284
	Spain	+34 901 666 221
	Switzerland	+41 415 126 044
	The Netherlands	+352 2020 2466
<b>UK &amp; Ireland</b>		+44 203 514 3808
<b>Nordic Countries</b>		+46 101 992 582
<b>Rest of Europe</b>		+352 2020 2142

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**North America**

<b>USA &amp; Canada</b>	+1 888 336 7778
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**Asia**

<b>Middle East</b>	Oatar	+352 2020 2499
	United Arab Emirates	+971 800 035 704437

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**Australia**

<b>Australia</b>	General Helpline	+352 2020 2499
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**Support Email**

General	support@3cpayment.com
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Please be informed that if you are encountering any issues with the above listed hotlines, feel free to contact us via our international number +352 27753\*\*\*, where \*\*\* is one of the following extensions:

- 311 (English)
- 312 (French)
- 313 (German)
- 314 (Spanish)
- 315 (Italian)

The following screen displays the latest release information, including version and release notes.

The screenshot shows a web interface with a navigation menu at the top: HOME, PAYMENT GATEWAY, ONLINE PAYMENTS, VIRTUAL TERMINAL, TOKEN, and MY SERVICES. Below the menu, a status bar indicates "You are now logged in". A banner features the Planet logo and the tagline "that payment moment" next to a colorful circular graphic. The main content area displays "v2.0.0.62 Release highlights:" followed by a list of updates: "Changes on Pay by link page, added new fields", "User guides per language and per services enabled", and "Performance fix and bug fixes". A message to the customer asks for the correct LocationID when contacting support, with a "LOAD LIST" button below it.

## 1.3 Top Menu

The tabs at the top of the Home Page represent different functionalities in the portal. Some data may not be available to all users. The tabs displayed are based on user permissions for each merchant.

On the Home Page, the merchant's name will appear in the banner at the top right of the screen in addition to the center.

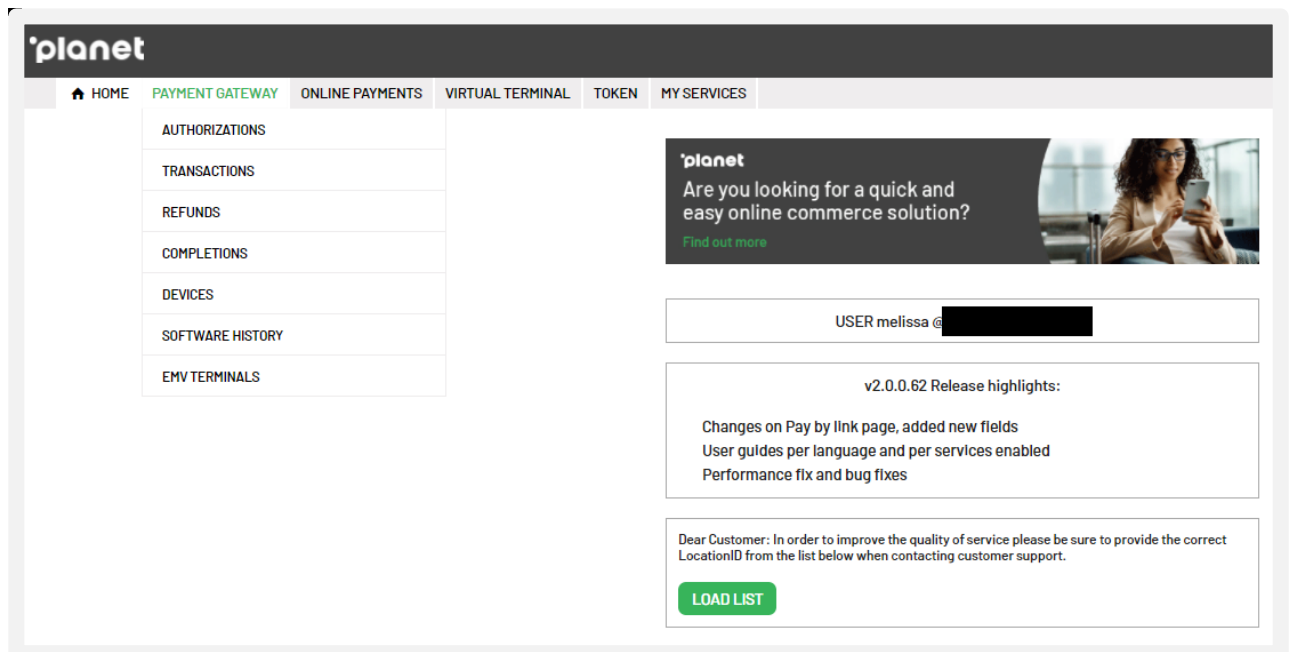
Release highlights can be found in the center of the screen.

## 2. Payment Gateway

### 2.1 Overview

In the payment gateway tab, users will find card present Point Of Sale transactions and authorization data.

By clicking on each item in the drop-down menu, users can access the detail for each transaction type.



The screenshot displays the Planet Payments Portal interface. At the top, the Planet logo is on the left, and navigation tabs include HOME, PAYMENT GATEWAY (highlighted), ONLINE PAYMENTS, VIRTUAL TERMINAL, TOKEN, and MY SERVICES. A left-hand sidebar menu lists: AUTHORIZATIONS, TRANSACTIONS, REFUNDS, COMPLETIONS, DEVICES, SOFTWARE HISTORY, and EMV TERMINALS. The main content area features a promotional banner for Planet with the text "Are you looking for a quick and easy online commerce solution?" and a "Find out more" link. Below the banner, a user profile section shows "USER melissa @ [redacted]". A "v2.0.0.62 Release highlights:" section lists: "Changes on Pay by Ilnk page, added new fields", "User guides per language and per services enabled", and "Performance fix and bug fixes". A "Dear Customer:" notice states: "In order to improve the quality of service please be sure to provide the correct LocationID from the list below when contacting customer support." A green "LOAD LIST" button is positioned at the bottom of this notice.

### 2.2 Authorizations

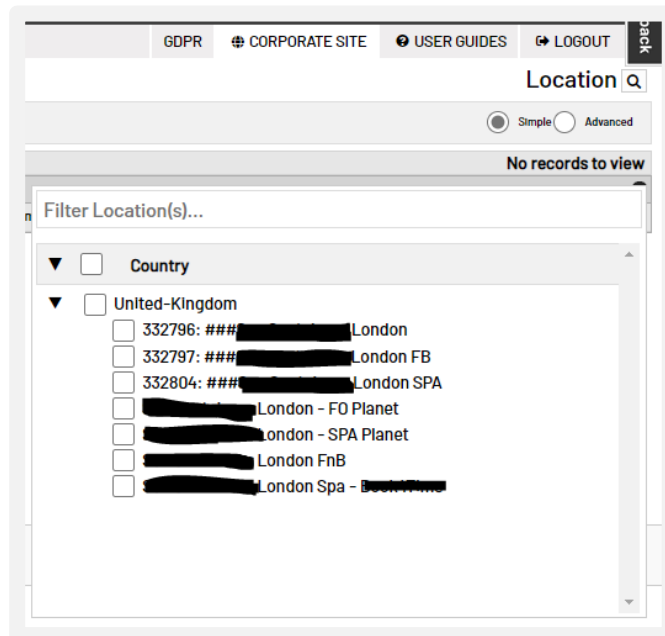
This will allow the user to view a page showing all real-time authorizations from the payment gateway server.

Below is an example of POS Authorisations results for "Today." Additional filters can be applied to narrow down transactions returned in the query.

Filters and actions shown here are user permissions based. User types include: basic, read-only, advanced, master, etc.

Actions	Location	LocationID	UserTransRef	TransDate	LocCurrenc	Currency	Amount	Method	CardType	CardNumber	AuthCode	Response	PosEnvironment
New Pay		33708		02/24/22 04:58:17	GBP	GBP	262.92	Completion	MASTERCARD			Approval	Attended POS
New Pay		33708		02/24/22 07:22:52	GBP	GBP	1,672.08	Completion	MASTERCARD			Approval	Attended POS
New Pay		33709		02/24/22 18:55:19	GBP	GBP	10.89	Sale	VISA			Approval	Attended POS
Reverse		33709		02/24/22 15:42:21	GBP	GBP	139.50	Authorisation	AMEX			APPROVAL	Attended POS
New Pay		33708		02/24/22 14:48:45	GBP	GBP	-128.87	Sale	VISA DEBIT			Approval	Mail/Telephone Order
New Auth		33708		02/24/22 10:31:23	GBP	GBP	-200.00	Sale	VISA DEBIT			Approval	Mail/Telephone Order
New Refund		33709		02/24/22 13:37:06	GBP	GBP	28.02	Sale	VISA			Approval	Attended POS
View Receipt		33709		02/24/22 21:36:22	GBP	GBP	10.13	Sale	MASTERCARD			Approval	Attended POS
New Pay		33708		02/24/22 17:02:09	GBP	GBP	-343.41	Sale	MASTERCARD			Approval	Mail/Telephone Order
Reverse		33708		02/24/22 14:46:00	GBP	GBP	833.82	Pre-Authorisation	AMEX			APPROVAL	Attended POS
New Pay		33708		02/24/22 13:12:17	GBP	GBP	503.88	Completion	VISA DEBIT			Approval	Attended POS

Merchants with several locations and multiple countries can click the Location button magnifying glass icon on the right side at the top of these pages to specify locations where they want to view report data. Again, the ability to view this data is dependent on user permissions management.

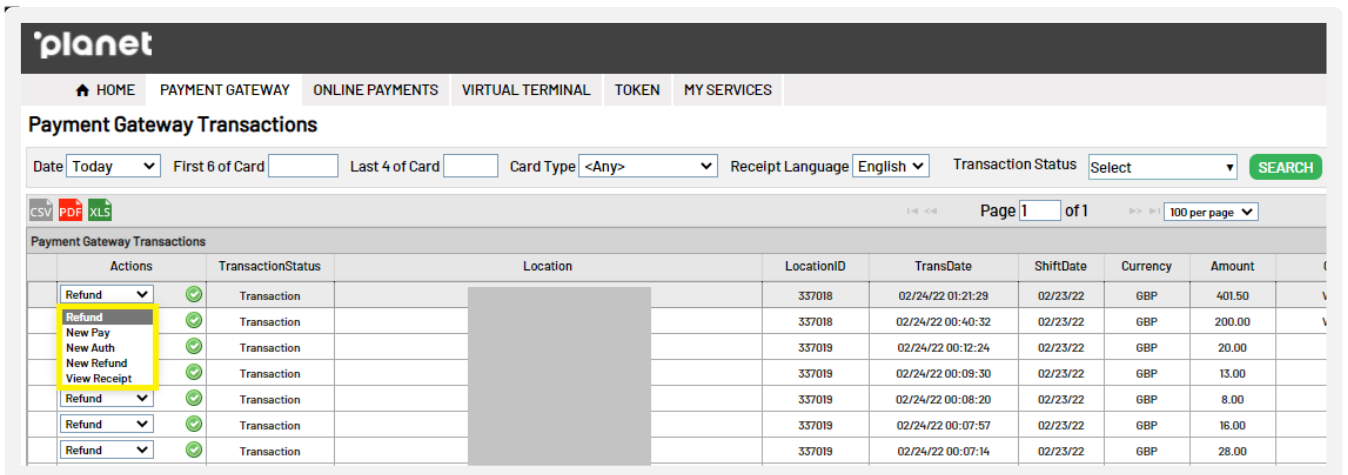
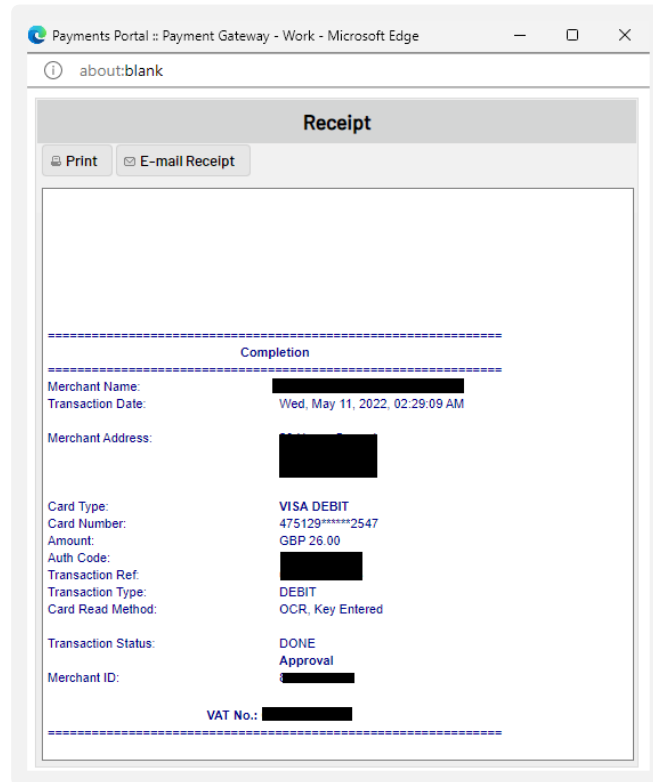


## 2.1 Transactions

Transactions allows the user to view a page showing all transactions uploaded from the payment gateway server and have reached our invoicing system. It displays the final settlement reconciliation record for the transactions approved during a business day. It will run next day early morning (T+1) between the Planet payment transaction host and the merchant acquirer bank. Your acquiring bank will process and collect the funds from the card-issuing banks to pay the funds for the card payments to the merchant.

The authorizations and transactions screens allow users to initiate several follow-up actions based on individual authorization events, including: new payments, new refunds, new authorizations, and view receipts. This will be available to merchants who are enabled with online payments.

Users who do not have online payments or e-commerce enabled will see refund, reversal, and view receipts only.



The EMV Terminal page supports filtering at the top by Terminal ID. This shows all terminal details and information for deployed hardware in the merchant locations.

The screenshot shows the 'Payment Gateway EMV Terminals' page. At the top, there is a navigation bar with 'HOME', 'PAYMENT GATEWAY', 'ONLINE PAYMENTS', 'VIRTUAL TERMINAL', 'TOKEN', and 'MY SERVICES'. Below this is a search bar with 'Instance Terminal ID' and 'TMS Terminal ID' fields, and a 'SEARCH' button. The main content is a table with the following columns: CustomerID, Location, LocationID, LocationCountry, MACAddress, SerialNumber, LastBindingDate, FirmwareName, LastFirmwareInstallationDate, LastConfigDownloadDate, InstanceTerminalID, TMSTerminalID, TerminalDescription, TerminalBrand, and TerminalModel. The table contains multiple rows of terminal data, with some dates highlighted in blue.

## 2.2 Completions

This will allow the user to view a real-time page showing all transactions uploaded from the payment gateway server. There is no delay between the actual transaction posting and the transaction rendered visible online.

Shown below are the Completion results for “Today” filter. Users can choose any date to search by. Apply the first six or the last four card digits, a specific date, or card type to find the transaction.

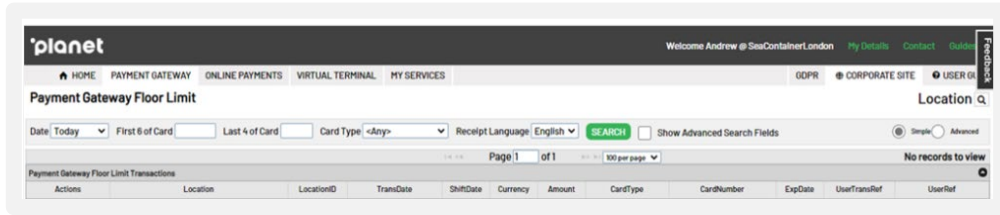
The completions tab allows merchants to verify and confirm if a payment has gone through online and settled towards Planet transaction host.

The ability to export data into reports is available on the left side at the top in PDF, CSV, and MS Excel formats for each report screen.

The screenshot shows the 'Payment Gateway Completions' page. At the top, there is a navigation bar with 'HOME', 'PAYMENT GATEWAY', 'ONLINE PAYMENTS', 'VIRTUAL TERMINAL', 'TOKEN', and 'MY SERVICES'. Below this is a search bar with 'Date' (Today), 'First 6 of Card', 'Last 4 of Card', 'Card Type' (<Any>), 'Receipt Language' (English), 'Include Reversed', and a 'SEARCH' button. The main content is a table with the following columns: Location, LocationID, TransRef, TransDate, ShiftDate, Currency, Amount, LocalCurrency, LocalAmount, CardType, CardNumber, ExpDate, UserTransRef, UserRef, UserData1, AuthCode, and TerminalID. The table contains multiple rows of transaction completion data.

## 2.3 Floor Limit

This section shows offline transactions which have been declined at your parking facility. To view this section, select the **Floor Limit** tab under **Payment Gateway**. Search by date by selecting either **Today** or **Custom** from the date drop-down menu, choose the desired range, and click the **Search** button. The date searched by is the **Payment Gateway Upload Date**.

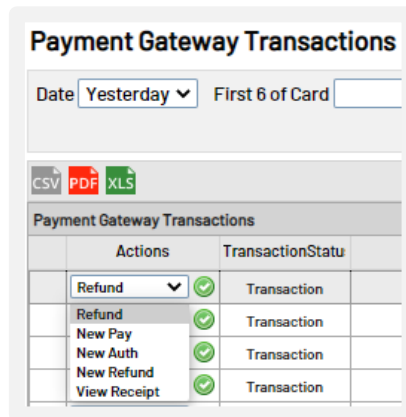


If multiple locations are enabled on your login, you can select a specific one from the drop-down menu on the right, or this can be left on Select, which returns results from all locations.

The results show two date fields, **Shift Date** and **Transaction Date**. **Shift Date** is the date the transaction was accepted at the parking equipment. **Transaction Date** is the date our systems last re-attempted to authorize the transaction.

## 2.4 Create a New Refund or Payment

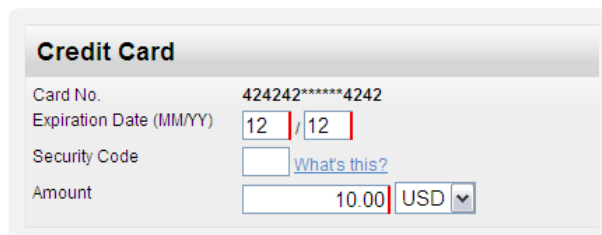
If the functionality is enabled, you can create a new refund or payment from an existing transaction without having access to the entire card data.



From the transaction page, choose one of the following from the drop-down menu:

- **New Pay** – Create a new transaction based on existing transactions. Once **New Pay** is selected from the drop-down menu, click the green check mark.
- **New Refund** – Create a new refund from a particular transaction. Once **New Refund** is selected from the drop-down menu, click the green check mark.

Once completed, the page shows the credit card number and expiration date already entered.



User Data (1) and User Data (2) can be used to enter comments used subsequently for auditing purposes.

Reference Data	
User Data (1)	<input type="text"/>
User Data (2)	<input type="text"/>



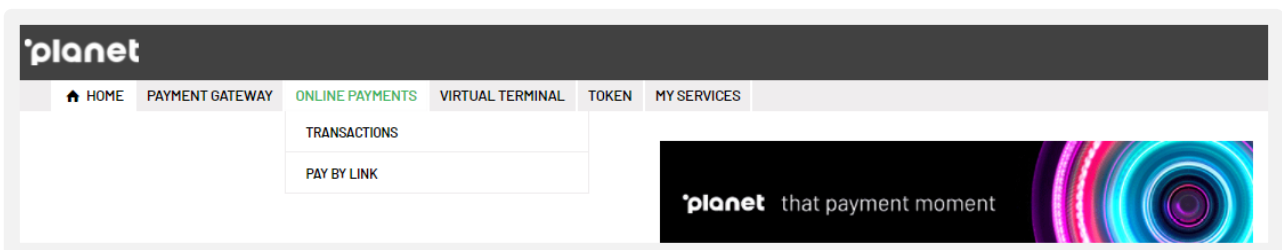
## 3. Online Payments

### 3.1 Overview

Once logged in to the Portal, select the **Online Payments** tab. You can search for transactions using the date drop-down and choose a period using the calendars.

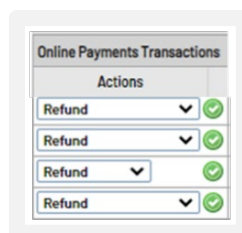
### 3.2 Transactions

In the **Online Payments** tab, e-commerce merchant users will find reporting for e-commerce transactions, including both those made online and those initiated utilizing the Pay by Link product.



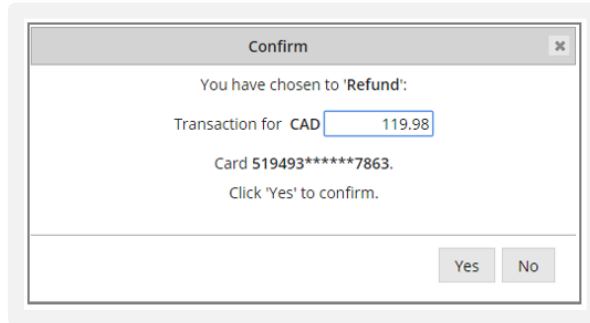
The **Transactions** shows transactions that have been processed for payment. It also allows the issue of a full or partial refund from a previously processed transaction without having access to card data.

Actions can be found on the online payments transactions view, such as reversals, refunds, new payments (sales), preauthorization, captures, and view the receipt for users who are allowed these permissions.

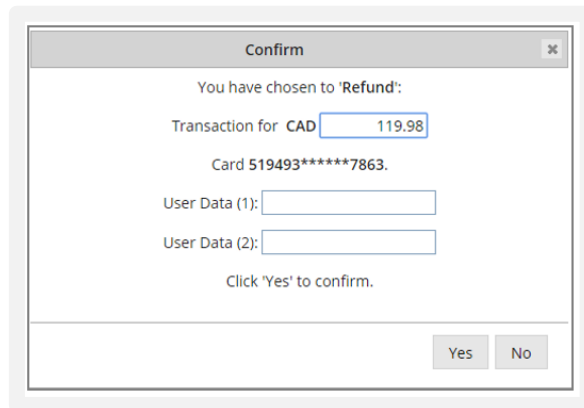


To refund a transaction, use the search option at the top of the transaction screen and search by the last four numbers of the credit card and the authorization date. Choose **Refund** from the drop-down menu under **Actions** and click the tick.

If the **Refund** follows the Online process, the following window is displayed, where the amount to refund must be entered. Click **Yes** to submit the refund for processing.



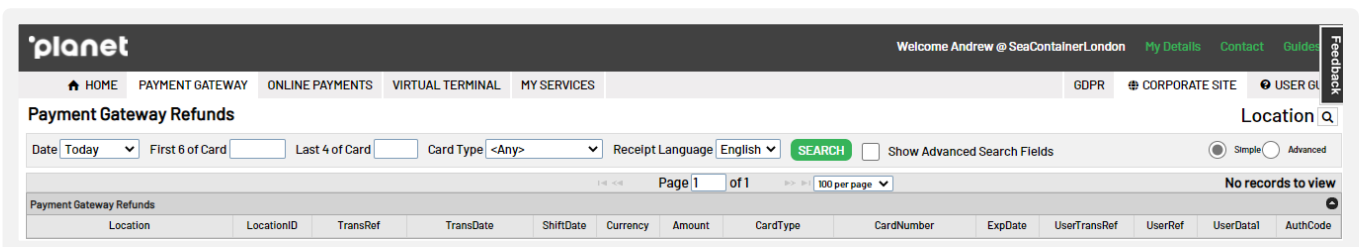
If the refund follows the Offline process, the following window is displayed. Enter the amount to refund and click **Yes** to submit the refund for processing.



**User Data (1)** and **User Data (2)** can be used to enter comments used subsequently for auditing purposes.

### 3.3 Refunds

**Refunds** allow you to see all the refunds made, whether invoiced or not. To access **Refunds**, you must have the appropriate permission.



### 3.4 Pay By Link

**Pay By Link** allows merchants to set up payments and provide a secure URL link to their customers to execute payments. When the customers click the link, they are redirected, via a browser, to a secure payment page to complete the payment. The merchant can provide the link to the customer through email, text message SMS, among other methods.

**i** The user must have permission to add or edit a **Pay By Link**.

**Pay By Link** lists all **Pay By Links** associated with the **CustomerID** login. The list can be filtered using the column headers.

Actions	eMerchantID	PayByLinkID	Type	Status	CurrencyID	Amount	Template	RequesterRefNo	Userdata1	Userdata2	User
Edit		CCB27371-324E-4A28-B922-2257A767473F	Single	Complete	GBP	446.04					
Edit		E3128838-66FD-40DE-B9EA-FB030E724C6C	Single	Active	GBP	120					
Edit		A5730F3D-1758-4693-AAEC-7A58A70534FE	Single	Active	GBP	1500					
Edit		A7ACB0AE-68D0-49FB-9674-CF8EA05105DC	Single	Complete	GBP	36					
Edit		6B74D79D-F771-4022-BF57-7ADADC5FD296	Single	Complete	GBP	336					

Select the desired **Pay By Link** from the list to check the details. Click the correspondent **Edit** button available on the left side of each entry. The details are populated at the bottom of the screen.

After selecting a **Pay By Link** in the list, the details are populated in the fields at the bottom of the screen:

### Pay By Link Detail

PayByLinkID:

URL:

eMerchant:

Type:

Status:

Currency:

Amount:

Service Action:

Language:

RequesterReferenceNo:

User Data 1:

User Data 2:

User Data 3:

User Data 4:

User Data 5:

Option Flags:

Template:

Expiry Date:

Active:

**ADD** **UPDATE** **DELETE** **CANCEL**

### Pay By Link Optional Configuration

Name	Value
Post URL Success	<input type="text" value="URL to send data in case of success"/>
Post URL Fail	<input type="text" value="URL to send data in case of failure"/>
Redirect Approved	<input type="text" value="URL to redirect in case of payment approved"/>
Redirect Declined	<input type="text" value="URL to redirect in case of payment declined"/>
Redirect Error	<input type="text" value="URL to redirect in case of error"/>
Merchant email	<input type="text" value="Pedro.Antunes@PlanetPayment.com"/>
Merchant Script Data 1	<input type="text"/>
Merchant Script Data 2	<input type="text"/>
Merchant Script Data 3	<input type="text"/>
Merchant Script Data 4	<input type="text"/>
Merchant Script Data 5	<input type="text"/>
Merchant Script Data 6	<input type="text"/>
Merchant Script Data 7	<input type="text"/>
Merchant Script Data 8	<input type="text"/>
Merchant Script Data 9	<input type="text"/>
Merchant Script Data 10	<input type="text"/>
Merchant Script Data 11	<input type="text"/>
DCC Allowed	<input type="checkbox"/>

### Property Management Data

PMS Notification Type:

Documentation for this section can be found by clicking [here](#) and selecting "Pay By Link Management User Guide" from the list.

### 3.4.1 Add Pay By Link

To add a new **Pay By Link**, click the **ADD** button at the bottom of the screen. This page allows users to enter all necessary data to create a new **Pay By Link**.

It is also possible to view **Pay By Link** details if they are connected to Online transactions. To filter out the rows containing only **Pay By Links**, tick the **Show Advanced Search Field** checkbox and **PaybyLink**. The resulting rows will have a new action, **View PaybyLink**. Selecting this action shows the **PaybyLink** detail (read-only).

The screenshot displays the 'PayByLink Transactions' page. At the top, there's a navigation bar with 'planet' logo and user information 'Welcome Andrew @ SeaContainerLondon'. Below it, a search bar allows filtering by Date (Custom), Last 4 of Card, Status (Any), Card Type (Any), Receipt Language (English), and Start/End dates (17 Aug 2021). A 'SEARCH' button and 'Show Advanced Search Fields' checkbox are present. The main table, titled 'Online Payments Transactions', has columns: Actions, Status, eMerchantID, LocationID, Currency, Amount, TransDate, CardType, Card, CardExpiry, UserRef, UserData1, UserData2, and AuthCode. Three rows are visible, all with a status of 'Capture Submitted' and CardType of 'MASTERCARD'.

Actions	Status	eMerchantID	LocationID	Currency	Amount	TransDate	CardType	Card	CardExpiry	UserRef	UserData1	UserData2	AuthCode
Refund	Capture Submitted		925606	GBP	75.00	08/17/21 13:13:37	MASTERCARD	XXXXXXXXXXXXXXXXXXXX	04/25				118469
Refund	Capture Submitted		925606	GBP	781.91	08/17/21 04:48:36	MASTERCARD	XXXXXXXXXXXXXXXXXXXX	09/21				944233
New Pay	Capture Submitted		925606	GBP	-300.00	08/16/21 23:57:03	MASTERCARD	XXXXXXXXXXXXXXXXXXXX	05/25				854321

### 3.4.2 Pay By Link detail fields

- **PaybyLinkID** – This is the unique identifier used to process payments on 3C systems.
- **URL** – The merchant needs to provide this URL to their customer to facilitate payment.
- **eMerchant** – This is the eMerchant account used by 3C iPage to process the payment.
- **Type** – A PaybyLink can be of type **Single** (only one payment is allowed) or **Multiple** (allows the customer to perform multiple payments with the same **PaybyLinkID**).
- **Status** – Indicates the current status of the **Pay By Link**. **Active** allows payment processing; **Complete** indicates a successful payment for **Type Single**.
- **Currency** – The currency to perform the transaction.
- **Amount** – The Amount of the transaction.
- **Language** – The template language presented to the customer, if supported by the portal.

#### ServiceAction

- The PBL page service action to be performed.
- 3DS, 3DSPay Perform a Three D Secure payment where possible. 3DSAutorise Perform a Three D Secure authorization where possible. Pay Perform a payment.
- Authorise Perform an authorization.
- CreateToken Validate card data only and return a token

**i** Available service actions are dependent on your account configuration.

- **RequesterRefNo** – The merchant's unique payment reference is available on payments reporting.
- **UserData** – These fields can provide additional merchant reference data.
- **Template** – This identifies which template is used to process the payment. The default value should be used; available templates depend on your account configuration.
- **OptionFlags** – Reserved for future use; your integration manager will let you know if this field is required.
- **Username** – The user that created/modified the Pay By Link.
- **Active** – Ensure that the box is checked for **Active**. Otherwise, the recurring payment will not be active, and the transactions will not be created.

### 3.4.3 Pay By Link optional detail fields

These fields are optional and are dependent on your account configuration. These values can default as part of the template.

- **post\_url\_success, post\_url\_fail** The URL Planet invokes success/failure; this is a Host to Host message the customer browser is not involved.
- **redirect\_approved, redirect\_declined, redirect\_error** The URL Planet redirects the customer's browser to.
- **merchant\_script\_data[n]** These values can be used to customize what is displayed to the customer. Values entered here in conjunction with the template configuration transform the payment page displayed to the customer.

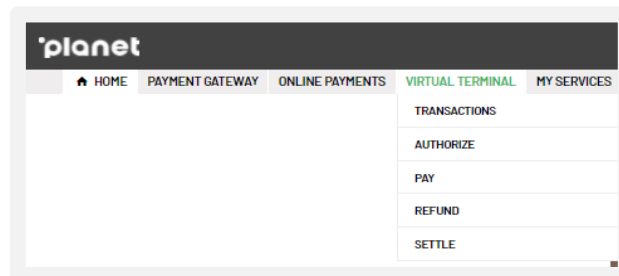


- Use an easily identifiable **RequesterRefNo** to allow you to keep track of your Pay by Links.
- User Data (1-5) are reference fields. For example, **User Data (1)** can be used for a facility or other reference parameter. Data entered in these fields will be included in each transaction and are essential for data mining. This must also be kept consistent for all entries.
- If you only expect one payment, always select **Type Single**; the status can always be set back to active to allow future payments.

## 4. Virtual Terminal

### 4.1 Overview

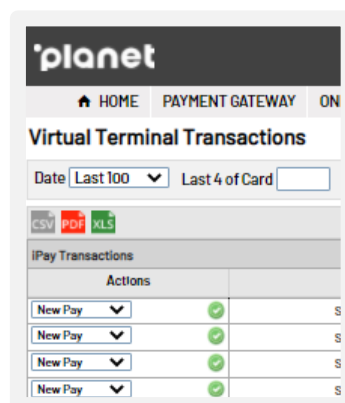
The **Virtual Terminal** tab drop-down menu displays reporting for transactions initiated via the Virtual Terminal.



The **Virtual Terminal** is a web-driven application that allows users to process card transactions without requiring a physical terminal. Users can enter card details directly on the screen to process authorizations, and sales, issue refunds, and settle (complete) transactions using a valid authorization code obtained separately. Minimal card details are required, and reference data can be optionally entered to note specifics about the payment for accounting purposes.

### 4.2 Transactions

**Transactions** tab allows you to see the history of all Virtual Terminal transactions processed. There are three actions you can also initiate from this menu:



- **New Pay** – Create a new transaction based on existing transactions. Once you have selected **New Pay** from the drop-down, click the green check mark to complete the transaction.
- **New Refund** – Create a full or partial refund from a particular transaction. After you select **New Refund** and click the green check mark, it initiates the refund and takes you to a payment screen. By default, the total transaction amount is populated; for partial repayment, enter the new amount and click **Submit**.

- **View Receipt** – Select **View Receipt** from the drop-down to view the original receipt issued in a transaction. Select **View Receipt** via the drop-down, and click the green check mark to see the receipt. From this view, you can print the receipt or highlight the receipt and CTRL-C/CTRL-V {copy & paste} into another document.

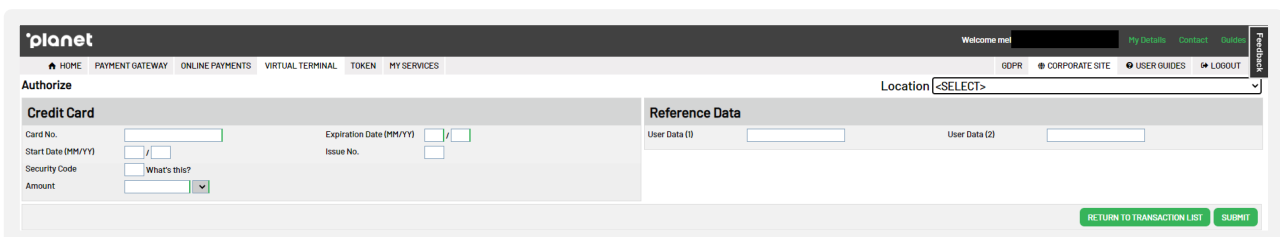
**Transactions** can be sorted by clicking on the desired column heading. For instance, clicking on the **Card Type** column header sorts all transactions by card type. By default, all transactions are sorted by **Transaction Date**.

The **Search** menu at the top right of the **Transactions** page allows you to search your historical transactions by **Date**, **Card Number**, or **Status**.

**i** **Virtual Terminal** supports wild cards, which is helpful if you don't have the whole card number. For example, if you have the last four digits of the card and would like to search by them, simply put %xxxx, where you replace the x's with the actual numbers.

## 4.1 Authorize

**Authorize** can be used when you need to hold an amount available for capture later on an account without actually charging the cardholder.



The screenshot shows the 'Authorize' page in the Planet Payments Portal. The page has a dark header with the Planet logo and navigation links: HOME, PAYMENT GATEWAY, ONLINE PAYMENTS, VIRTUAL TERMINAL, TOKEN, MY SERVICES. A user is logged in as 'Welcome mel'. There are links for My Details, Contact, Guides, GDPR, CORPORATE SITE, USER GUIDES, and LOGOUT. The main content area is titled 'Authorize' and has a 'Location' dropdown menu set to '<SELECT>'. Below this, there are two main sections: 'Credit Card' and 'Reference Data'. The 'Credit Card' section includes fields for Card No., Start Date (MM/YY), Security Code (with a 'What's this?' link), Amount, Expiration Date (MM/YY), and Issue No. The 'Reference Data' section includes fields for User Data (1) and User Data (2). At the bottom right, there are two green buttons: 'RETURN TO TRANSACTION LIST' and 'SUBMIT'.

Once you have completed the **Authorization**, you can capture the amount in the **Transactions** menu. Locate your previous authorized request, and select **Capture** from the drop-down menu. Click the green checkbox to initiate the capture request up to the initial authorized amount.

**Refund** function allows you to refund a cardholder.

## 4.2 Pay

**Pay** allows you to create a charge. If the request is authorized, it is automatically captured at the end of the business day.

There are three mandatory fields to process a credit card transaction, the full **Card No.**, **Expiration Date**, and **Amount**. It is strongly recommended to complete at least the **Security Code** and **zip code**.

The screenshot shows the 'Pay' form in the Planet Payments Portal. The form is divided into two main sections: 'Credit Card' and 'Reference Data'. The 'Credit Card' section includes fields for Card No., Expiration Date (MM/YY), Start Date (MM/YY), Issue No., Security Code, and Amount. The 'Reference Data' section includes fields for User Data (1) and User Data (2). A 'Location' dropdown menu is visible at the top right. At the bottom right, there are two buttons: 'RETURN TO TRANSACTION LIST' and 'SUBMIT'.

Reference Data fields, **User Data (1)** & **User Data (2)**, are reference fields for your transactions. These fields are populated by you, and an example of how to use these fields would be to insert a customer or business name in **User Data (1)** and a transaction note in **User Data (2)**.

Once you have filled in the data, click, **Submit** to initiate the transaction. A window is displayed once the transaction is completed.

The screenshot shows a 'Transaction Result' dialog box. The dialog has a yellow background and contains the following text: 'Authorization Approved', 'Authorisation Code: 201508', and 'Capture Queued'. At the bottom of the dialog, there are three buttons: 'OK', 'Last 100 Transactions', and 'View Receipt'.

### 4.3 Settle

**Settle** feature allows you to complete a transaction using a valid **Authorization Code**.

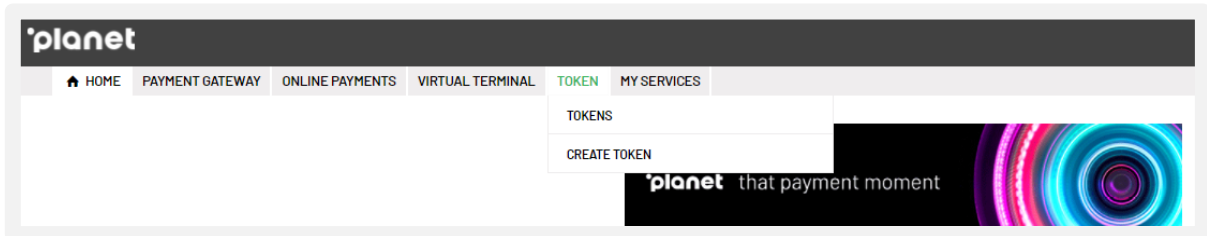
The screenshot shows the 'Settle' form in the Planet Payments Portal. The form is divided into two main sections: 'Credit Card' and 'Authorization Code'. The 'Credit Card' section includes fields for Card No., Expiration Date (MM/YY), Start Date (MM/YY), Issue No., and Amount. The 'Authorization Code' section includes a field for Authorization Code. Below the 'Authorization Code' section, there is a 'Reference Data' section with fields for User Data (1) and User Data (2). A 'Location' dropdown menu is visible at the top right. At the bottom right, there are two buttons: 'RETURN TO TRANSACTION LIST' and 'SUBMIT'.

Enter the required fields, including the **Authorization Code**, and click **Submit**.



## 5. Token

The **Token** tab drop-down menu offers a list of tokens stored for the merchant to view and select from (**Tokens**). The **Create Token** feature allows users to create new tokens for customers instead of storing sensitive card data.

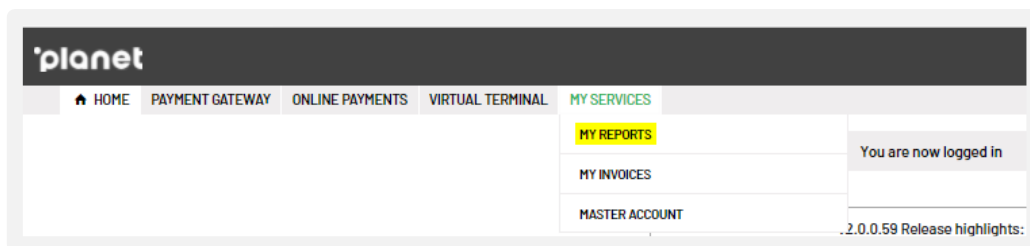


Users can take actions from the list of tokens, including retrieving, searching, and managing the token data, initiating new payments, new authorizations, and refunds to customers. Refer to Chapter 3, **Virtual Terminal**, for more information.

## 6. My Services

### 6.1 My Reports

Under the **My Services** tab, users can view a reporting module, **My Reports**, for more detailed daily transaction summary reporting by product. This allows users to generate various reports which can be viewed for an individual location or for all locations associated with the Customer ID that can be exported to excel, PDF, or CSV.



**My Reports** supports three custom date stamps to search and generate a report:

- 1) Invoice Date = the date when funds are sent to the acquirer, typically transaction date +1
- 2) Shift Date = business date stamp of the merchant (24-hour business day)
- 3) Transaction Date = actual transaction timestamp date itself

#### 6.1.1 Report types

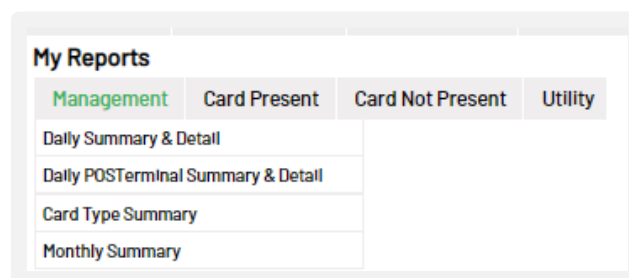
Users can generate reports by revenue center with customized hierarchies. There are many reports with different options available. **Reports** are configured against your login based on the account type and services. The following table contains a list of the most common reports and a brief description of their purpose.

**Table 1** My Reports Options

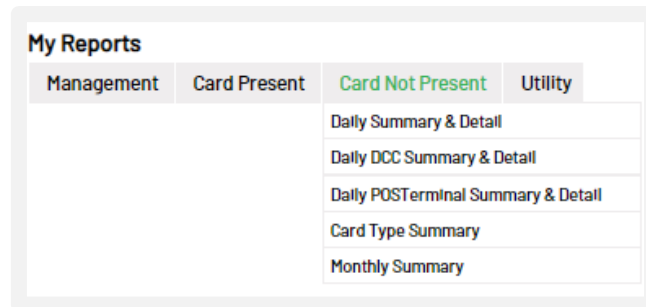
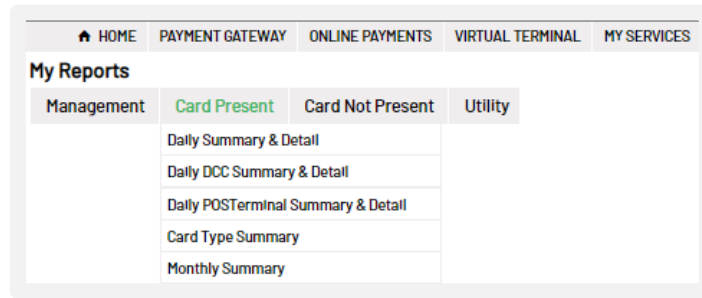
Report	Description
Daily Summary & Detail	Provides a daily summary of transactions processed, broken down by location, card type, and currency. It also includes a separate page showing each transaction per location.
Daily DCC Summary & Detail	Same as the "Daily Summary & Detail" but also provides a summary breakdown by card entry mode, DCC capability, and currency selected.
Daily POS Terminal Summary and Detail	Provides a daily summary of transactions processed, broken down by Terminals, card type, and currency. It also includes a separate page showing each transaction per Terminal and Location.
Credit Card Search	Provides a list of all credit card transactions matching the given search criteria.

Report	Description
Monthly Summary	Provides a summary for a given month of transactions processed, broken down by per day, location, card type, and currency. It also provides a monthly total for the period by card type.
Daily Detail Export (CSV)	Provides a list of all transactions for a given date which can be easily exported to CSV format.
Daily Fee Summary	Provides a daily summary of transactions processed, broken down by location and including various fees such as Merchant handling fees, SIX Payment Services handling fees, and VAT.
Daily InvRun Summary	Provides a daily summary of transactions processed, broken down by location, InvRun number, card type, and currency.
Refund Transaction Search	Provides a list of all refund transactions matching the given search criteria.
Weekly Payment Summary	Provides a list of payment amounts by location, which were deposited, along with the corresponding shift date they relate to.
Refund/Debit Credit Card Search	Provides a list of all refunded transactions and the corresponding debit, matching the search criteria.
Daily Summary Export (CSV)	Provides a summary of transactions processed, broken down by customer, location, card type, and currency for a given date, on a single line, which can be easily exported to CSV format.

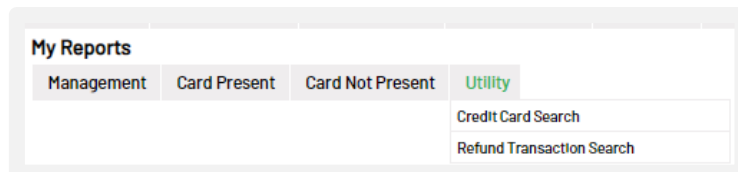
The **Management** tab offers a daily summary report for Card Present and Card Not Present Transactions altogether.



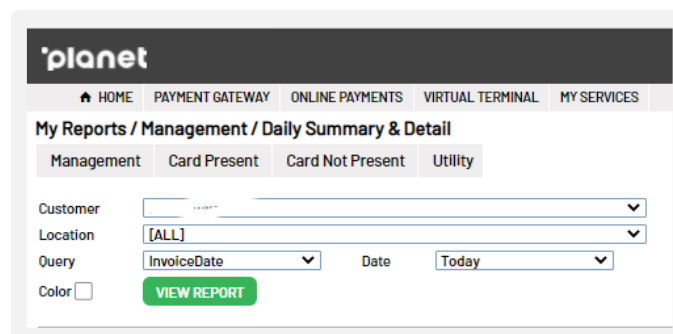
If separate reports are preferred, those can be downloaded from each corresponding tab channel for **Card Present** or **Card Not Present**.



If users are looking for a specific credit card transaction history, the **Utility** tab supports a credit card search function with the first four or last six digits of the credit card number or by entering the authorization code.



After clicking on any of the reports, the screen below is displayed.

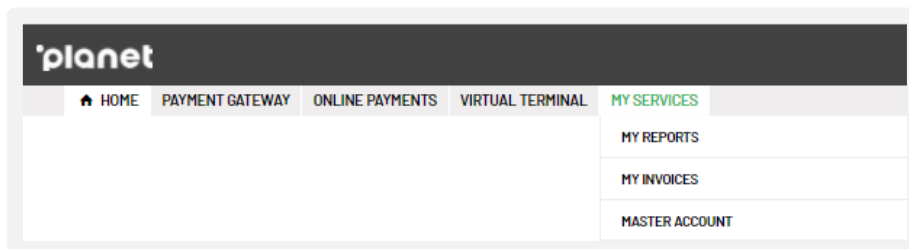


Select the **Location** by Invoice date, shift date, or Transaction date and by a specific date or a user-defined period. Below is an extract report output.

Transaction Summary		AED		CAD		CHF		DKK		EUR		GBP		HKD		MXN		PLN		GAR
		NoTrans	Amount	NoTrans	Amount	NoTrans	Amount	NoTrans	Amount	NoTrans	Amount	NoTrans	Amount	NoTrans	Amount	NoTrans	Amount	NoTrans	Amount	
EJ 2021-08-01	VS	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	1	100.00	0	0.00	0	0.00	0	0.00	0
	Subtotal (Per TransactionDate)	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	1	100.00	0	0.00	0	0.00	0	0.00	0
EJ 2021-08-02	VS	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	1	150.00	0	0.00	0	0.00	0	0.00	0
	Subtotal (Per TransactionDate)	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	1	150.00	0	0.00	0	0.00	0	0.00	0
EJ 2021-08-03	VS	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	2	215.00	0	0.00	0	0.00	0	0.00	0
	Subtotal (Per TransactionDate)	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	2	215.00	0	0.00	0	0.00	0	0.00	0
EJ 2021-08-04	VS	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	2	155.00	0	0.00	0	0.00	0	0.00	0
	Subtotal (Per TransactionDate)	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	2	155.00	0	0.00	0	0.00	0	0.00	0
EJ 2021-08-05	VS	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	2	220.00	0	0.00	0	0.00	0	0.00	0
	Subtotal (Per TransactionDate)	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	2	220.00	0	0.00	0	0.00	0	0.00	0
EJ 2021-08-08	VS	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	3	420.00	0	0.00	0	0.00	0	0.00	0
	Subtotal (Per TransactionDate)	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	3	420.00	0	0.00	0	0.00	0	0.00	0

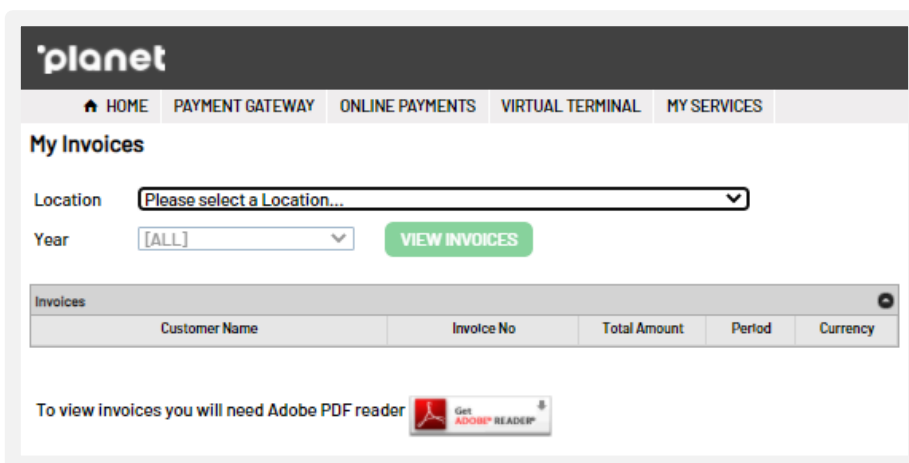
## 6.2 My Invoices

This chapter highlights how to view invoices. Once logged in to the Portal, select the **My Invoices** tab under **My Services**.



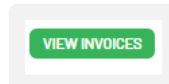
From here, you can search for invoices by using the **Location** and **Year** drop-down.

**My Invoices** shows invoices for our services, which have been generated. Invoices can be viewed for an individual location or all locations associated with your **Customer ID** if you have more than one location. Start by selecting a location from the **Location** drop-down menu.



Search for all available invoices by leaving the **Year** option as **[ALL]** or select the “browse more...” option to get a list of all available years for which invoices are available.

Click the **View Invoices** button to generate a list of available invoices that match the criteria.



### 6.2.1 My Invoices highlights

**My Invoices**

Location: 630210: TEST LOCATION 1

Year: 2012

**VIEW INVOICES**

Customer Name	Invoice No	Total Amount	Period	Currency
Test Company	020426	635.86	201201	EUR
Test Company	021343	633.57	201202	EUR
Test Company	022176	878.40	201203	EUR
Test Company	023114	1,202.37	201204	EUR
Test Company	023979	1,260.17	201205	EUR
Test Company	024782	1,412.99	201206	EUR
Test Company	025660	1,489.30	201207	EUR
Test Company	027191	1,038.56	201208	EUR
Test Company	027320	1,112.78	201209	EUR
Test Company	028535	1,197.73	201210	EUR
Test Company	029132	836.35	201211	EUR
Test Company	030134	664.55	201212	EUR

You can view or download invoices from the list of invoices displayed by clicking on the **Invoice No** field for the corresponding invoice. Your web browser may prompt you to open or save the file. If you wish to view the invoice once, you can choose open; if you want to save it on your computer, you should select the save option.



If you are having trouble viewing the invoices, ensure you have the latest version of the Adobe PDF reader, which can be downloaded from <http://www.adobe.com>.

## 6.3 Master Account

This chapter's purpose is to give the **Master User** assistance to create a **Basic User** with **View Only** access or/and an **Advanced User** with **Read and Write** access in the Portal. **Read and Write** access will allow users to execute refunds and authorization reversals.

### 6.3.1 Overview

The **Master Account** page offers merchants user management within the portal, including assigning and editing user permissions. **Master Account** allows the user to add, edit and delete other users assigned to any **Customer ID** associated with the login.

Once logged in to the portal, select **Master Account** in the **My Services** tab menu.

**i** It is recommended to use at least Internet Explorer 8 or higher version to view this page.

By default, when you load the **Master Account** section, a grid shows all users currently assigned to the **Customer ID**, including all child **Customer IDs** you are logged in with.

Once Planet has created a hierarchy, admins can be assigned to specific sub-accounts (child customer IDs). Each merchant location is attached to its customer ID (child customer ID).

Actions	Username	CustomerID	Password Expiry	Setup Date	Locked	Locked Date	Active	Master Account
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>			2021-11-02	2019-02-07 13:57:27	false		true	false
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>			2021-11-08	2019-02-07 15:04:02	false		true	false
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>			2021-10-10	2021-07-12 06:52:49	false		true	false
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>			2019-05-08	2019-02-07 14:53:39	false		true	false

#### 6.3.1.1 Master User

A **Master User** can create new users, edit user details, delete users, and refine actions and specific permissions for each user. The **Master User** account functionality allows Master Users to manage their team of users and prevents extra Setup costs. Planet can supply one or more Master User accounts.

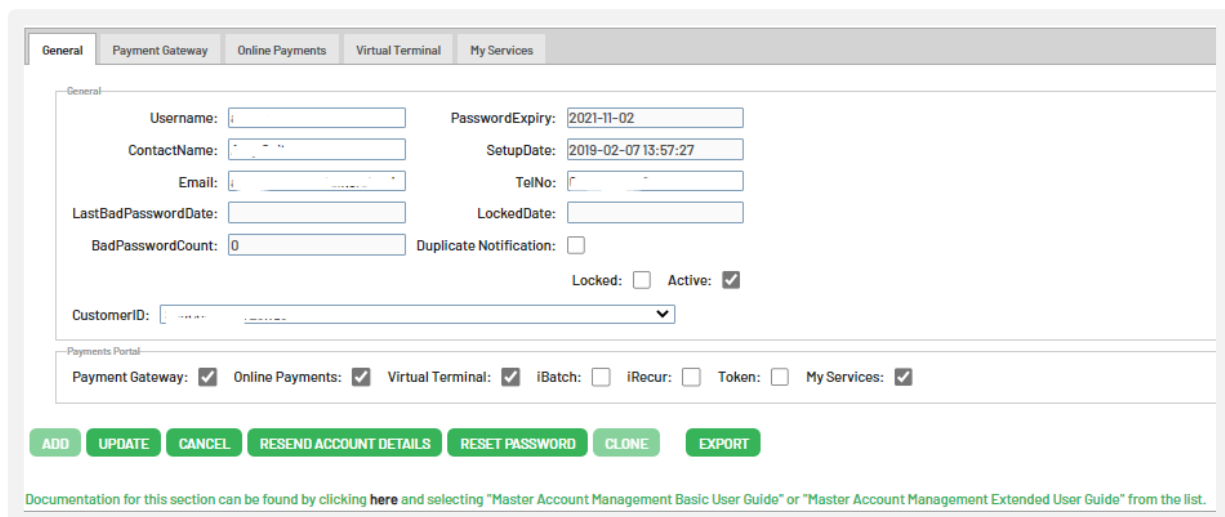
**i** The **Master User** cannot create, add, edit, or delete any other **Master User**. This action is performed by Planet.

### 6.3.2 Create Basic User – “View Only” access

The **Basic User** has the most limited role. The **Basic User View**, Only rights setup, allows the user to access predefined permissions.

- 1) In the **Master Account** menu, click **ADD** new user.
  - **Unique Username**
  - **Contact name** – full name of the actual user
  - **Email** – mandatory, used to request a new password or reset password

**Master Account** displays options in the configuration section that allows you to set the permissions and actions for each user on the corresponding areas of the Portal.



- 2) Assign the user to the required account access level.

Select from the **CustomerID** the existing account to which you want to link the user. Set the account to **Active** for new users or as **Locked** if not required anymore.

- **Active** – This determines whether the account is online and allowed to be used. The user cannot log in to the Portal if this box is inactive.
- **Locked** – This indicates whether an account has been locked out. This might be due to several incorrect login attempts by the user, or they have not logged in within a specific time frame, and therefore the account becomes locked as a security precaution.

**i** After three failed passcode attempts, the password is locked for 20 minutes. The option to reset the password via E-mail is available on the Portal login page.



3) Set required permissions for a **Basic User View Only**.

**View Only** users shall only have access to Permissions **Authorization, Transactions, and Completions**. Do not attribute any of the **Actions**.

The screenshot shows the 'Payment Gateway' configuration page. The 'Permissions' section has the following settings: Authorisations: , Transactions: , Duplicate: , Reversal: , FloorLimit: , and Completion: . The 'Actions' section has the following settings: Reverse: , Refund: , Release: , and ResetAuthorise: . Below the settings are buttons for ADD, UPDATE, CANCEL, RESEND ACCOUNT DETAILS, RESET PASSWORD, CLONE, and EXPORT. A note at the bottom states: 'Documentation for this section can be found by clicking [here](#) and selecting "Master Account Management Basic User Guide" or "Master Account Management Extended User Guide" from the list.'

4) Permissions

- **Authorizations** – This will allow the user to view a page showing all real-time authorization from their PlanetIntegra server.
- **Transactions** – This will enable the user to view a page showing all transactions uploaded from their PlanetIntegra server and reached our invoicing system.
- **Completion** – This will allow the user to view a page showing all transactions uploaded from their PlanetIntegra server in real-time.
- **Duplicate - Reversal - Floor Limit** depends on the product type and acquiring bank set-up. Consult your Planet support before using these options.

### 6.3.3 Create Advanced User – “Read and Write” access

1) Click the **Payment Gateway** menu bar to set up permissions.

The screenshot shows the 'Payment Gateway' configuration page. The 'Permissions' section has the following settings: Authorisations: , Transactions: , Duplicate: , Reversal: , FloorLimit: , and Completion: . The 'Actions' section has the following settings: Reverse: , Refund: , Release: , and ResetAuthorise: . Below the settings are buttons for ADD, UPDATE, CANCEL, RESEND ACCOUNT DETAILS, RESET PASSWORD, CLONE, and EXPORT. A note at the bottom states: 'Documentation for this section can be found by clicking [here](#) and selecting "Master Account Management Basic User Guide" or "Master Account Management Extended User Guide" from the list.'

2) Click **Authorization, Transactions, and Completions** as standard **Permissions**.

General | **Payment Gateway** | Online Payments | Virtual Terminal | My Services

Permissions

Authorisations:  Transactions:  Duplicate:  Reversal:  FloorLimit:   
 Completion:

Actions

Reverse:  Refund:  Release:  ResetAuthorise:

ADD UPDATE CANCEL RESEND ACCOUNT DETAILS RESET PASSWORD CLONE EXPORT

Documentation for this section can be found by clicking [here](#) and selecting "Master Account Management Basic User Guide" or "Master Account Management Extended User Guide" from the list.

- **Authorizations** – This allows the user the view a page showing all real-time authorization from their Planet server.
  - **Transactions** – This allows the user to view a page showing all transactions uploaded from their Planet server and reached our invoicing system.
  - **Completion** – This allows the user to view a real-time page showing all transactions uploaded from their Planet server.
- 3) Go to **Actions** in the menu bar below and click **Reverse** and **Refund** to set up standard **Actions**.
  - **Reverse** – This allows the user to reverse an authorization on the authorizations page, which the payment processor has not yet captured.
  - **Refund** – This allows the user to refund a transaction on the transactions page.



Not all acquiring banks support these online actions. If your **Master Account** has any actions granted, it is supported for your set-up.

General | **Payment Gateway** | Online Payments | Virtual Terminal | My Services

Permissions

Authorisations:  Transactions:  Duplicate:  Reversal:  FloorLimit:   
 Completion:

Actions

Reverse:  Refund:  Release:  ResetAuthorise:

ADD UPDATE CANCEL RESEND ACCOUNT DETAILS RESET PASSWORD CLONE EXPORT

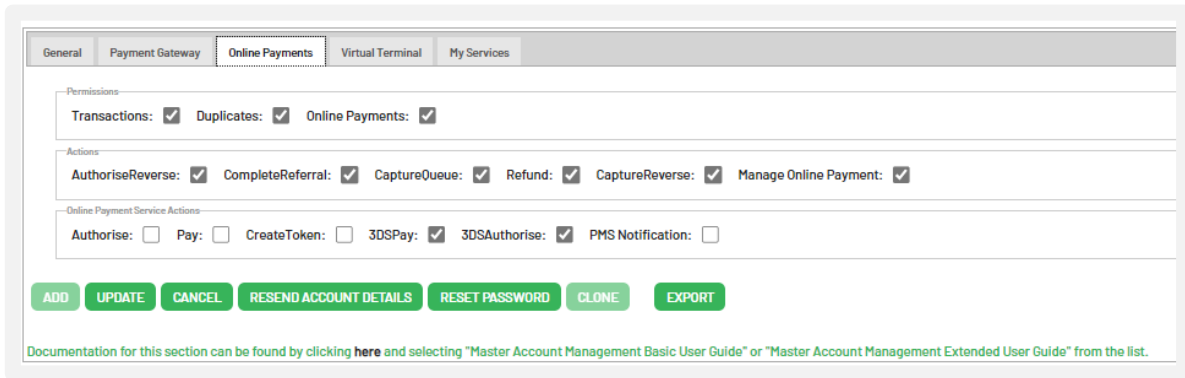
Documentation for this section can be found by clicking [here](#) and selecting "Master Account Management Basic User Guide" or "Master Account Management Extended User Guide" from the list.

### 6.3.4 Online Payments (website reservations)



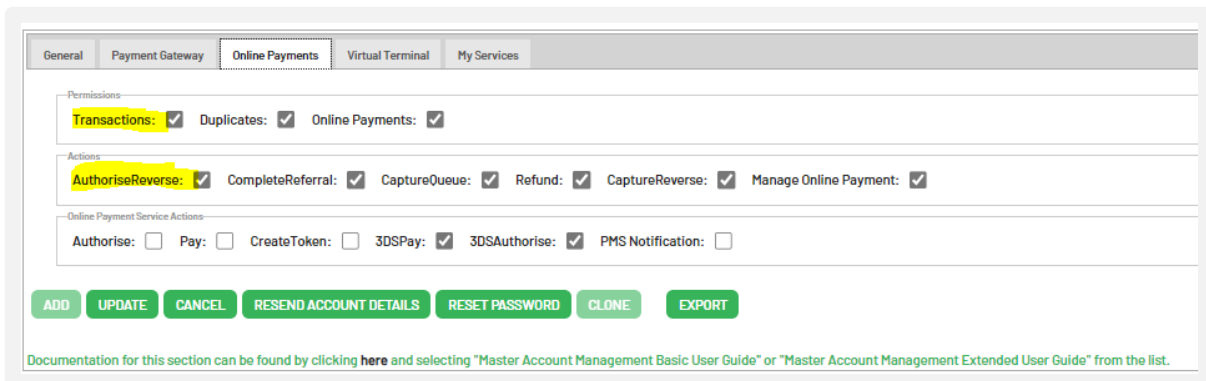
This product is only enabled if purchased from Planet.

- 1) Click Online Payments to set up permissions in the Portal menu.



## 2) Click **Transactions** as standard **Permissions**.

- **Transactions** – This allows users to view a page of all real-time transactions using their Web2Pay system. Go to **Actions** in the menu bar below and click **AuthoriseReverse** to set up standard **Actions**.
- **AuthoriseReverse** – This allows the user to reverse an authorization in the **Authorize Approved** status on the transactions page.



### 6.3.5 Edit user account settings

Within the grid, you can see brief information about each user, including the **Customer ID** the account is assigned to and whether the account is **Locked**, **Active**, or a **Master Account**. Under actions, you can find **Edit** and **Delete** options.

**i** **Delete** option deletes the user account, which cannot be undone from the **Master Account** screen.

- **Edit** – loads the user details into the configuration section of the page, allowing you to make changes as required. **Edit** function also allows the user to **Edit** the password. When you are done making your changes, click the **Update** button for the changes to take effect.
- **Clone** – allows you to create a new user with the same permissions and settings as the user you clicked clone. A username, email address, and customer ID must be provided.

**Master Account**

Logins

Actions	Username	CustomerID	Password Expiry	Setup Date	Locked	Locked Date	Active	Master Account
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>			2021-11-02	2019-02-07 13:57:27	false		true	false
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>			2021-11-08	2019-02-07 15:04:02	false		true	false
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>			2021-10-10	2021-07-12 06:52:49	false		true	false
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>			2019-05-08	2019-02-07 14:53:39	false		true	false
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>			2021-07-25	2021-04-21 08:43:24	false		true	false