

sage Pay

A composite image featuring a man in the foreground looking towards a vibrant, futuristic city skyline at night. The city is filled with glowing skyscrapers, illuminated roads, and a large bridge structure. A prominent white building with a curved facade is visible on the right. The overall atmosphere is one of modern technology and urban development.

MySagePay **USER GUIDE**

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1.0 Welcome to MySagePay

MySagePay is your own cloud based administration area that allows you to manage your Sage Pay account without needing your own management software.

You are able to view all of your transactions, create and define reports, search for customer transactions, process phone based orders, and much more.

In this guide we will outline everything MySagePay can do, and how you can do it.

Every account with Sage Pay has two versions of MySagePay available to them, a Test and a Live version. Both the Test and Live systems look and work in the same way. In this guide we will provide information that can be used on either platform.

1.1 Logging into MySagePay

The first thing you will need to do before you can use your MySagePay is to log in.

To do this you must go to the MySagePay login page.

The URLs that you will need to enter into your browsers for MySagePay are –

TEST Server

<https://testportal.sagepay.com/mysagepay/login.msp>

LIVE Server

<https://portal.sagepay.com/mysagepay/login.msp>

After reaching the login page you will be able to enter your details and login to your account.

Sign in to MySagePay

Remember me

Sign in

[Reset/Unlock your password](#)
[Recover your username](#)
[Need help?](#)

[Click here for Test MySagePay](#)

Users

If you are logging into your MySagePay for the first time you will need to use the main administrative credentials that were provided by Sage Pay.

These details include a Vendor name, and an administrative password. If you do not have access to your administrative password **e-mail support@sagepay.com** with your vendor name and we will re-send the details through to you.

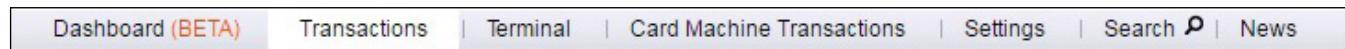
You'll need your Vendor Name to hand when logging in as your Vendor Name needs to be entered in both the Vendor Name AND User Name boxes.

If you are logging in as your own User the vendor name will be your Sage Pay vendor name, and your Username and Password will be the details you created.

More information on **logging into MySagePay** can be found on our website. 

1.2 What you will see

Now that you have logged into your MySagePay admin panel you will be presented with a number of tabs along the top of the page that you can use to manage your account.



If you are logged into your MySagePay as the administrative user you will only be able to access the “**Settings**” tab on the page. To access the other tabs in your MySagePay you will need to be logged into the account as a user you have created.





2.0 Settings

The settings area of MySagePay is where you will manage the users, restrictions, and fraud prevention tools available on your account.

Once on the Settings tab all of the available options will be listed on the left hand side of the screen.

In this section we will cover each section and run through the options that are available to you.

2.1 My Account

The My Account section allows you to change the details of the user currently logged into the account as.

You are able to create a new password for this user, and add an e-mail address to the user so you can receive updates and communications from Sage Pay.

The screenshot shows the 'My Account' settings page. On the left, a sidebar lists various account management options: Dashboard (BETA), Transactions, Terminal, Card Machine Transactions, Settings, Search, News, Sign out, and MySagePay logo. The main content area is titled 'My Account Details' with a sub-section 'My account settings'. It displays the following information:

| | |
|---|------------------|
| Username: | sagepay |
| Name: | |
| Email address: | sage@sagepay.com |
| Email validation status: | Not Validated |
| Link to validate your email address was sent to you on 28/06/2016 Click here to send the link again. | |
| Receive updates and communications: | No |
| Homepage: | search.msp |

At the bottom of this section is a green 'Edit' button. Below this is another section titled 'My password' with a 'Login password:' field containing '*****' and a 'Change' button. At the very bottom, it shows 'My Sage Pay last accessed on: 28/06/2016 11:05:25'.

If you are logged in as the administrative user you are not able to change the password.

You can only change passwords for users that you have created, not the Administrator set-up by Sage Pay.

2.2 Settings

The Settings enable you to change the details of your account and apply certain restrictions.

You have four options in this section –

The screenshot shows the 'Display & General Settings' section of the MySagePay Settings page. On the left, there's a sidebar with links like Dashboard (BETA), Transactions, Terminal, Card Machine Transactions, Settings (which is selected and highlighted in grey), Search, and News. The main area has two columns. The left column, titled 'Restricted domains', says 'You currently have no restricted domains.' and includes a note about users changing email addresses. It has an 'Add' button. The right column, titled 'Language Settings', shows 'Current Language Selected is: EN - English' and a note to edit language settings. It also has an 'Edit' button. Below these are sections for 'Account settings' (with fields for Company display name, Full homepage URL, Support email address, Send HTML emails, Default Terminal currency, and Payment page templates) and 'Your payment pages logo' (with a note to email a GIF logo to support@sagepay.com).

Restricted Domains

This is where you are able to add specific e-mail domains to your account that once applied force users to have e-mail addresses that use the domains listed.

For example – if you add sagepay.com to the list users can only change their email addresses to **name@sagepay.com**

The dialog box is titled 'Add a restricted domain'. It contains instructions: 'Add a domain to your list of restricted domains below, e.g. sagepay.com' and 'If you have a list of restricted domains then users may only change their email addresses to ones with domains from this list.'. There is a field labeled 'Restricted domain : *' with a yellow border, and a 'Add' button at the bottom.

Account Settings

This section allows you to change the details for your company that are displayed to your customers, and included in your confirmation emails if sent from Sage Pay.

You are able to change your company display name, your homepage URL, and your support e-mail address.

Company display name: * SagePay
Your full homepage URL: * www.sagepay.com
Your support email address: Sagepay@sagepay.com
Send HTML emails to customers:
Default currency in Terminal: GBP
Payment page templates: Default Address read-only No address Custom
Update

Also if you have telephone payments enabled on your account you are able to change the default currency.

Alongside this you can also activate your customised payment pages here. If we have added your customised payment pages to your account you are able to switch them on in this section.

More information available here: [\(link\)](#)

Payment Pages logo

If you have provided Sage Pay with your company logo it will be displayed to you here. This is the logo that will appear on your Sage Pay payment pages.

2.3 AVS/CV2

AVS (Address Verification System) and CV2 (Card Verification checks) are two of the fraud prevention tools that are available to you when you have an account with Sage Pay.

The AVS fraud prevention tool checks the numerical values in the customer's address and postcode against the details that are held with the card issuing bank to ensure they match. The CV2 uses the three digit security code on the reverse of the card to ensure it matches with the card details that are provided.

In this section you are able to turn the AVS and CV2 fraud prevention checks on, and once turned on you are able to apply rules to the account.

Dashboard (BETA) | Transactions | Terminal | Card Machine Transactions | Settings | Search | News | Sign out | MySagePay

My Account
Settings
AVS/CV2
3D Secure
Restrictions
Valid IPs
Change Log
Users
Pay Methods
Surcharges
Page Customiser

AVS/CV2 Administration
Turn AVS/CV2 checking ON and OFF against your account, and manage the rules against the AVS/CV2 checks.

AVS/CV2 checking is ON
All transactions currently send the address, postcode and CV2 numerics to the bank for validation.
Turn off

You do not have any rules.
Add rule

Adding a rule

These rules allow you to define how the results of your AVS and CV2 checks will be used by the Sage Pay systems.

From only performing the checks to rejecting transactions based on the results you can decide what you want to do with the transactions based on the results returned.

The dialog box has a title bar 'Add a new AVS/CV2 rule'. It contains a text field 'Enter the range for all transactions to which this rule applies.' with 'Start value:' and 'End value:' input fields. Below this is a section titled 'For transactions within this range:' with four checkboxes: 'Accept DATA NOT CHECKED (bank or card scheme don't check values)', 'Accept ADDRESS MATCH ONLY (CV2 check fails, Address check succeeds)', 'Accept SECURITY CODE MATCH ONLY (Address fails, CV2 check succeeds)', and 'Accept NO DATA MATCHES (both CV2 and AVS checks fail)'. At the bottom is a 'Add rule' button.

When setting your rules you can have as many or as few as you would like. To set a rule all you need to do is pick a start price and end price range – anything from 0.00 – 100,000.00 and select what you would like to accept.

For full details on how to set your AVS/CV2 rule base click here: [\(link\)](#)

2.4 3D Secure

3D Secure is another fraud prevention tool that is available to you when using Sage Pay.

The 3D Secure scheme is managed by Verified by VISA and MasterCard Secure Code and is password protection for your shoppers.

If you have 3D Secure enabled on your account your shoppers will be required to enter the password they have assigned to their card in order to process a transaction.

3D Secure is available to e-commerce transactions ONLY and does not apply to telephone orders.

The screenshot shows the MySagePay dashboard with a sidebar containing links: Dashboard (BETA), Transactions, Terminal, Card Machine Transactions, Settings, Search, News, Sign out, and MySagePay logo. The main content area is titled '3D Secure Administration' with a sub-section '3D Secure checking is ON'. It explains that 3D Secure checks are turned on for all transactions processed against the account. A 'Turn off' button is present. On the left, a sidebar lists '3D Secure' under 'Restrictions' and other options like Valid IPs, Change Log, Users, Pay Methods, Surcharges, and Page Customiser.

Adding a rule

Similar to the AVS/CV2 fraud prevention tools you are able to set your own rules that will define how Sage Pay use the results of the 3D Secure checks with your transactions.

You can decide when 3D Secure is applied to transactions, and if you would like the transactions to be accepted or rejected based on the 3D Secure results.

The screenshot shows a dialog box titled 'Add a new 3D secure rule'. It contains fields for 'Start Value:' and 'End Value:' with asterisks indicating required input. Below these are several checkboxes for transaction behaviors: 'Perform the 3D secure authentication' (checked), 'Accept non-3D secure cards to be authorised', 'Accept authorisations when MPI errors occur', 'Accept cards from non-3D secure issuers to be authorised', and 'Accept 3D secure failures to continue for authorisation'. At the bottom right is a grey 'Add rule' button.

When adding a rule you will need to select a start price and end price and what you would like to see accepted or rejected for each.

If you would like to add a 3D Secure rule, full details on how to do so can be found here: [🔗](#)

2.5 Restrictions

The restrictions section is where you can manage IP addresses, countries, and cards you would like to prevent from processing transactions through your account.

There are four options to choose from when deciding what you would like to block.

Blocked IP Addresses

Here you can block specific or ranges of IP addresses from being able to process transactions through your account.

The screenshot shows a dialog box titled 'Add a blocked IP address'. It includes instructions: 'Enter the IP address and subnet mask you wish to block.' and 'Both the IP address and subnet mask should be zero padded, e.g. 127.000.000.001'. It also states: 'Once added, all transactions from the IP address / subnet mask range will be blocked.' Below are fields for 'IP address:' and 'Subnet mask:', both with asterisks and red placeholder boxes. A small triangle icon is next to the IP address field. At the bottom right is a grey 'Add' button.

More about Blocking IP Addresses can be found on [our website](#). [🔗](#)

Blocked Card Ranges

By entering the first 9 digits of a specific card you will prevent any card beginning with those numbers from processing a transaction through your account.

If you would like to know about blocking card ranges, please click here: [↗](#)

Add a blocked card range
Enter the first 9 digits of the card number you wish to block.
Once added, all transactions within that card range will be blocked.

Card range : *

Add

Blocked Countries

Blocking a country will stop any transactions from being accepted when the IP address used is from a country you have blocked.

Add a blocked country
Choose one or more country from the list.
Once added, all transactions from that country will be blocked.

Afghanistan
Aland Islands
Albania
Algeria
American Samoa

Add

To block a country you will need to select it from a list provided by Sage Pay.

To find out more, please click here: [↗](#)

Blocked Issuing Countries

By selecting to block a country you will prevent any cards that are issued in that country from being able to make a purchase through your account.

Add a blocked country
Choose one or more country from the list.
Once added, all transactions from that country will be blocked.

Afghanistan
Aland Islands
Albania
Algeria
American Samoa

Add

To block an issuing country you will need to select it from a list provided by Sage Pay.

For more information, please click here: [↗](#)

2.6 Valid IPs

If you are using the Sage Pay Server or Direct method of integration you will need to submit a valid IP address for your application or website server to Sage Pay in order for your transactions to be accepted by our systems.

| IP Address | Subnet Mask | Description |
|--------------------|-------------|-------------|
| No Valid IPs found | | |

The Valid IP section allows you to manage the IP addresses of your website or applications that you would like Sage Pay to accept transactions from.

If a transaction request is received by Sage Pay from an IP address that is not on your valid list it will be rejected by our system.

More information on adding IP addresses to your Sage Pay account can be found here: [»](#)

If you are using the Sage Pay virtual terminal to process transactions or the Form method of integration you will not need to use this section of MySagePay.

2.7 Change Log

The change log provides a list of all of the changes that have been made to your MySagePay admin panel since you began using your account (these aren't archived on a periodic basis like transactions). You will be shown changes to rules, restrictions, and users.

| Date/Time | Description | Username |
|-------------------------|------------------------------|-------------|
| 09/12/2013 09:55:13.553 | User nick has been updated | christopher |
| 09/12/2013 09:54:54.930 | User nick has been unlocked | christopher |
| 09/12/2013 09:44:58.217 | User nick has been updated | christopher |
| 09/12/2013 09:42:58.893 | User nick has been locked | christopher |
| 09/12/2013 09:42:27.993 | User nick has been unlocked | christopher |
| 09/12/2013 09:42:18.923 | User nick has been locked | christopher |
| 09/12/2013 09:40:12.703 | User nick has been updated | christopher |
| 09/12/2013 09:38:38.920 | User nick has been updated | christopher |
| 09/12/2013 09:38:46.303 | User nick has been added | christopher |
| 09/12/2013 08:55:46.747 | User lucia has been deleted | christopher |
| 09/12/2013 08:55:43.393 | User marcel has been deleted | christopher |
| 09/12/2013 08:55:39.560 | User becky has been deleted | christopher |
| 05/12/2013 15:49:56.320 | User lucas has been added | christopher |
| 05/12/2013 15:25:29.123 | User Marcel has been added | christopher |
| 05/12/2013 11:14:29.390 | User becky has been added | christopher |
| 05/12/2013 10:10:46.323 | User jo has been deleted | christopher |
| 05/12/2013 09:54:58.813 | User Jo has been added | christopher |
| 05/12/2013 09:54:05.930 | User chris has been deleted | christopher |

2.8 Users

Here, you are able to manage all of the User profiles for your MySagePay. You are able to add and remove users, and change permissions of existing users in your account.

The main screen provides you with an overview of your users, you are then able to select any user to amend the details and permissions. By selecting the user you want to amend you will be able to change all permissions for the user along with the passwords and email addresses assigned.

You are also able to delete the users by selecting them.

Adding new users is also done here, by clicking New User you will be able to create new details

All users should have their own MySagePay credentials, user accounts **SHOULD NOT be shared.**

When adding users, or amending users any changes that you will make will appear in the change log so you can monitor the changes you have made.

2.9 Pay Methods

The Pay Methods screen shows you all of the card types and currencies that can be accepted on your Sage Pay account.

If you would like to know what your account can accept you can select this page and all of the information will be displayed for you.

The screenshot shows the 'Pay Methods' section of the MySagePay interface. On the left, a sidebar lists various account management options. The main area displays payment methods: 'Cards' (VISA, MasterCard), 'European payments' (PayPal), and 'Other'. It also shows supported currencies: 'Your account is set up to accept the following currencies.' (e.g., GBP). A link 'Use PayPal Express Checkout with Sage Pay' is present, along with a field for entering a primary PayPal email address ('sage@sagepay.com') and a 'Change my PayPal account' button.

Along with the card types and currencies offered by your account you are also able to set-up your PayPal account to be used on your Sage Pay account here.

All you need to do within your MySagePay to set-up PayPal is click on the PayPal option in the bottom right hand of the screen and enter your PayPal e-mail address.

This will then link your PayPal account to the Sage Pay systems.

You will also need to make a number of changes to your PayPal account directly in order to enable it to be used with Sage Pay.

To find out what settings you need to amend have a look here: [→](#)

2.10 Surcharges

Surcharges allow you to apply additional charges to cards that are being used by your shoppers on your Sage Pay account.

| Payment Type | Currency | Fixed | Percentage |
|---------------------|----------|-------|------------|
| No surcharges found | | | |

You are able to set a surcharge for each card type that is accepted on your account. The amount can either be fixed (a set amount) or a percentage of the transaction.

Add Surcharge

Payment Type: *

Currency: *

Surcharge Type: Fixed Percentage

Value:

Add

Once the surcharge has been added to your account it will then be added to the value of the transaction once the shopper reaches the payment pages, or when you are processing the transaction through the MySagePay terminal.

Surcharges can only be used to recover the charges that are imposed on your company by your merchant bank. Any surcharges you add to your account cannot exceed those transactional charges.

For e-commerce transactions you must be using Protocol 3.0 for surcharges to work on your account.



3.0 Transactions

The transactions section is where you will manage the day to day activity of your Sage Pay account. Here you will be able to see all transactions that are processed through your account, manage those transactions, perform voids and refunds, and manage your settlement.

The transactions section gives you five options to manage your transactions

- 1. Transactions**
- 2. Summary**
- 3. Settlement**
- 4. Bulk Actions**
- 5. Invalid**

Each of these options will allow you to completely manage all of the transactions that have been processed through your account.

3.1 Transactions

The transactions section is where you will be able to view all of the transactions that have been processed through your account.

A screenshot of the MySagePay Transaction Report page. The page has a header with links for Dashboard (BETA), Transactions, Terminal, Card Machine Transactions, Settings, Search, News, and Sign out. The main area is titled 'Transaction Report' with date range filters from 29/05/2016 to 28/06/2016. It includes buttons for report range (Any, Hourly, Daily, Weekly, Monthly, Annually) and result (All, Success, Failure). There is also an 'advanced' button. Below this is a search bar with fields for OBP, Customer Name, Type, Vendor Tx Code, Amount/Inc. Surcharge, Received, CV2, Add, PC, 3D, Fraud Screening, and Refund. A message 'No transactions found' is displayed. At the bottom are buttons for Show/hide columns, Print friendly, and Export to CSV.

You are able to obtain a full list of your transactions, or if needed you can refine your date range by using the options along the top of the screen.

If you are having difficulty locating a transaction you can refine your search further by selecting the advanced button.

Refine your report

from: 21/12/2013 to: 20/01/2014

report range: Any Hourly Daily Weekly Monthly Annually

result: All Success Failure

Payment Type: All

Transaction type: All

Account type: All

Vendor tx code:

Amount(Inc. Surcharge):

Last 4 digits:

Search Clear all

Once selected you will be able to narrow your search further. You can enter the amount, card type, payment type, account type (e-commerce, MOTO, or Continuous Authority), and the last four digits of the card that was used for the transaction.

All transactions processed through your account, whether successful or failed will appear in this section.

The transaction list will show transactions that meet the criteria you have defined, however you are also able to change the information that is displayed in the transaction list.

Select the columns you wish to show in your grid

| | |
|---|---|
| <input type="checkbox"/> Transaction ID | <input type="checkbox"/> Fraud Screening Action |
| <input type="checkbox"/> Customer Name | <input type="checkbox"/> Batch ID |
| <input type="checkbox"/> Type | <input type="checkbox"/> Abort |
| <input type="checkbox"/> Vendor Tx Code | <input type="checkbox"/> Release |
| <input type="checkbox"/> Success | <input type="checkbox"/> Refund |
| <input type="checkbox"/> System | <input type="checkbox"/> Repeat |
| <input type="checkbox"/> Account Type | <input type="checkbox"/> Username |
| <input type="checkbox"/> Amount(Inc. Surcharge) | <input type="checkbox"/> Fraud Screening Score |
| <input type="checkbox"/> Surcharge | <input type="checkbox"/> Fraud Screening ID |
| <input type="checkbox"/> Payment Type | <input type="checkbox"/> Billing Name |
| <input type="checkbox"/> Last 4 Digits | <input type="checkbox"/> Billing Address |
| <input type="checkbox"/> Received | <input type="checkbox"/> Delivery Name |
| <input type="checkbox"/> VPS Authcode | <input type="checkbox"/> Delivery Address |
| <input type="checkbox"/> Bank Authcode | <input type="checkbox"/> Card Name |
| <input type="checkbox"/> CV2 | <input type="checkbox"/> Card Address |
| <input type="checkbox"/> Add | <input type="checkbox"/> PProTxId |
| <input type="checkbox"/> PC | <input type="checkbox"/> Reference |
| <input type="checkbox"/> 3D | |

Select All Deselect All

Once you have selected which fields you would like to be included they will then appear for each transaction on the list.

Exporting

If you would like a copy of your transaction list you can do so by clicking on either the "Print Friendly" or "Export to CSV" buttons. This will provide you with a copy of the transaction list that can be exported to Excel in CSV format, or a printable version.

Transaction Details

Along with viewing your transactions you are also able to manage them here. Once you have located the transaction you are able to perform certain actions depending on the transaction type, and the date it was made.

To perform any actions on transactions processed through your account you must first click on the transaction to bring up the transaction details screen.

All options available to perform on a transaction will then be displayed in the bottom right of the pop-up.

Once the transaction detail has loaded you will also see a number of options down the left hand side of the screen.

These options are

Summary

A breakdown of the transaction details including the shopper details (name and address).

The screenshot shows a "Successful Payment - SagePay-140204115737-399" message. The "Summary" section contains links for "Additional Details", "Authorisation Details", "Fraud Results", and "Related Transactions". The "Transaction Summary" section states "Successfully authorised transaction." and lists the following details:

| | |
|--------------------------|--------------------------------------|
| Customer name: | Sage Pay |
| Customer email: | (not provided) |
| Completed: | 04/02/2014 11:50:44.237 |
| Amount (inc. Surcharge): | 100.00 - GBP |
| Surcharge: | 0.00 - GBP |
| Description: | Terminal Payment taken by SagePay |
| Sage Pay unique ID: | 6165AC58-82BA-B0FA-9E86-36350EF3587E |

The "Billing Address" and "Delivery Address" sections show the same address: "88 SagePay Street, SagePay, TF412ST, United Kingdom". The "Cardholder Address" section shows the same address: "88 SagePay Street, SagePay, TF412ST, United Kingdom".

At the bottom, there are four buttons: "Print" (orange), "Refund" (green), "Repeat" (green), and "Void" (green).

Additional Details

Here you will be shown details of the IP address used, if the transaction has been refunded, and the basket contents.

Successful Payment - SagePay-140204115737-399

Additional Details

| | | | |
|-------------------|---|--------------|-------------------------|
| Refunded: | No | Repeated: | No |
| Client IP: | 193.128.190.039 | User: | chris |
| Started: | 04/02/2014 11:58:42.650 | Completed: | 04/02/2014 11:58:44.237 |
| Gift Aid: | No - The customer did not check the gift aid box | System used: | Terminal |
| Callback URL: | None | | |
| Client locations: | Country: United Kingdom; Region: England; City: Newcastle Upon Tyne; ISP: Sage (uk) Ltd; Domain: Uu.net | | |

Shopping basket
No shopping basket provided

Print **Refund** **Repeat** **Void**

Authorisation Details

This screen shows the Merchant Number used for the transaction, along with the authorisation code, and the settlement details. The card information such as the address, card type, and last 4 digits can be found here.

Successful Payment - SagePay-140204115737-399

Authorisation Details

| | |
|--------------------------|--|
| Acquirer: | Lloyds TSB Cardnet |
| Merchant number: | 540436511111112 |
| Bank authcode : | 999777 |
| VPS authcode: | 6280959 |
| Attempt: | 1 |
| Account type: | M |
| Settlement info: | This transaction has not been settled. |
| Cardholder name: | SagePay |
| Card address: | 88 SagePay Street TE412ST |
| Last 4 digits: | 0006 |
| Additional card details: | Credit Card - Sage Pay Test Visa, GB |

Print **Refund** **Repeat** **Void**

Fraud results

A breakdown of the fraud prevention checks and result for Address, Postcode, and Security Code as well as the 3rd Man fraud score and the 3D Secure results.

The screenshot shows a 'Successful Payment' summary for SagePay transaction ID 140204115737 399. The 'Fraud Results' tab is selected. Key details include:

- 3D Secure:** 3D secure applied: 3D-Secure checks were DISABLED for this transaction. Status: NOTCHECKED.
- AVS & CV2:** AVS/CV2 applied: Default - AVS/CV2 check and rules applied if they were active on the account at the time. Results: Address numeric: MATCHED, Post code value: MATCHED, CV2 value: MATCHED.
- Fraud Screening:** Fraud Screening Results: Data sent to The 3rd Man. Awaiting analysis. Check back in an hour. Total fraud score: 0.

Buttons at the bottom: Print, Refund, Repeat, Void.

Related transactions

Here you will see any other transactions that have been processed that relate to the original transaction. Refunds and Repeat transactions will be displayed here.

The screenshot shows a 'Successful Refund' summary for SagePay transaction ID 140204115737-399-744. The 'Related Transactions' tab is selected. Key details include:

| Amount(Inc. Surcharge): | 100.00 GBP | Surcharge: | 0.00 GBP |
|-------------------------|-------------------------|----------------|----------|
| System used: | Server | User: | chris |
| Started: | 04/02/2014 12:22:04.890 | Bank authcode: | 999777 |
| VPS authcode: | 6202374 | | |

Buttons at the bottom: Print, Refund, Repeat, Void.

3.2 Summary

The Summary section enables you to view a complete breakdown of the transactions that were processed through your account.

The screenshot shows a detailed transaction breakdown. The main table has columns for Transaction Breakdown, Volume In, Value In, Volume Out, Value Out, Total Volume, and Net Value. The breakdown is categorized as follows:

- Successful:**
 - EUR:**
 - MOTO:** 2 transactions, 2.00 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 2, Net Value 2.00.
 - GBP:**
 - e-Commerce:** 17 transactions, 1.952.80 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 17, Net Value 1.952.80.
 - Gateway:** 17 transactions, 1.952.80 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 17, Net Value 1.952.80.
 - Credit:** 11 transactions, 9.50 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 11, Net Value 9.50.
 - MasterCard:** 10 transactions, 9.50 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 10, Net Value 9.50.
 - Payment:** 10 transactions, 9.50 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 10, Net Value 9.50.
 - Visa:** 1 transaction, 1.920.30 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 1, Net Value 1.920.30.
 - Payment:** 1 transaction, 1.920.30 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 1, Net Value 1.920.30.
 - Debt:** 6 transactions, 23.00 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 6, Net Value 23.00.
 - Visa Debit / Delta:** 6 transactions, 23.00 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 6, Net Value 23.00.
 - MOTO:** 5 transactions, 94.70 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 5, Net Value 94.70.
 - Gateway:** 2 transactions, 91.50 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 2, Net Value 91.50.
 - Credit:** 2 transactions, 91.50 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 2, Net Value 91.50.
 - MasterCard:** 1 transaction, 1.20 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 1, Net Value 1.20.
 - Payment:** 1 transaction, 1.20 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 1, Net Value 1.20.
 - Visa:** 1 transaction, 90.30 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 1, Net Value 90.30.
 - Payment:** 1 transaction, 90.30 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 1, Net Value 90.30.
 - sagepay:** 3 transactions, 3.20 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 3, Net Value 3.20.
 - Credit:** 2 transactions, 2.00 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 2, Net Value 2.00.
 - MasterCard:** 2 transactions, 2.00 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 2, Net Value 2.00.
 - Payment:** 2 transactions, 2.00 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 2, Net Value 2.00.
 - Debt:** 1 transaction, 1.20 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 1, Net Value 1.20.
 - Visa Debit / Delta:** 1 transaction, 1.20 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 1, Net Value 1.20.
 - Payment:** 1 transaction, 1.20 Volume In, 0.00 Value In, 0.00 Volume Out, 0.00 Value Out, Total Volume 1, Net Value 1.20.

At the bottom of the table are buttons for "expand all" and "collapse all".

You can drill down through your transactions from successful and failed, to e-commerce or MOTO, to users, and card types. This also provides you with the volumes, and values of the transactions for analysis.

3.3 Settlement

The screenshot shows a settlement report with the following table:

| Acquirer | Batch ID | Date | Currency | No of Payments | Payment Val. | No of Refunds | Refund Val. | Total Trans. | Net Amt. |
|----------|----------|------------|----------|----------------|--------------|---------------|-------------|--------------|----------|
| Acquirer | 12345 | 22/10/2015 | GBP | 2 | 100.00 | 0 | 0.00 | 2 | 100.00 |
| Acquirer | 12346 | 26/10/2015 | GBP | 0 | 0.00 | 1 | 1.00 | 1 | -1.00 |

The settlement section of your MySagePay account shows you the details of all of the transactions that were sent to your bank, and the funds transferred from your shopper's account to your own.

At the end of each day Sage Pay take all of the transactions that were processed and collect them into a "Batch". This batch is then sent to your merchant bank for the funds to be moved from your shopper's account to your own.

The settlement screen gives you a list of all batches that have been sent to your bank along with the volume and values of each.

If you want to view the contents of each batch you can do by clicking on the batch and a list of the transactions included will appear as a pop up.

Batch Detail Report for batch id 12345 with GBP currency

| | Vendor Tx Code | Type | System | Amount(Inc. Sur) | Payment Type | Received | VPS Authcode | Bank Authcode |
|---|----------------|---------|--------|------------------|--------------------|-------------------|--------------|---------------|
| 1 | Sagepay 12345 | Payment | F | 100.00 GBP | MasterCard | 01/01/01 00:00:00 | 12345678 | 12345678 |
| 2 | Sagepay 12345 | Payment | F | 100.00 GBP | Visa Debit / Delta | 01/01/01 00:00:00 | 12345678 | 12345678 |

You can then use the settlement totals displayed here to reconcile with your bank statements.

3.4 Bulk Actions

If you are using the Deferred payment method the bulk actions screen can be used to perform actions on more than one transaction at a time.

With the Deferred payment type you have two actions you can take – Release or Abort.

Dashboard (BETA) Transactions Terminal Card Machine Transactions Settings Search ⚡ News Sign out MySagePay

Transactions
Summary
Settlement
Bulk Actions
Invalid

Bulk Actions
Perform Aborts and Releases on more than one transaction at a time.

| Received | Vendor Tx Code | Card Name | Amount(Inc. Surcharge) | CV2 | Add | PC | 3D | Fraud |
|--|----------------|-----------|------------------------|-----|-----|----|----|-------|
| No transactions available for bulk actions | | | | | | | | |

Bulk Abort **Bulk Release**

A Release will enable the transaction to be sent for settlement and allow the funds to be taken from the shoppers account and credited to your own.

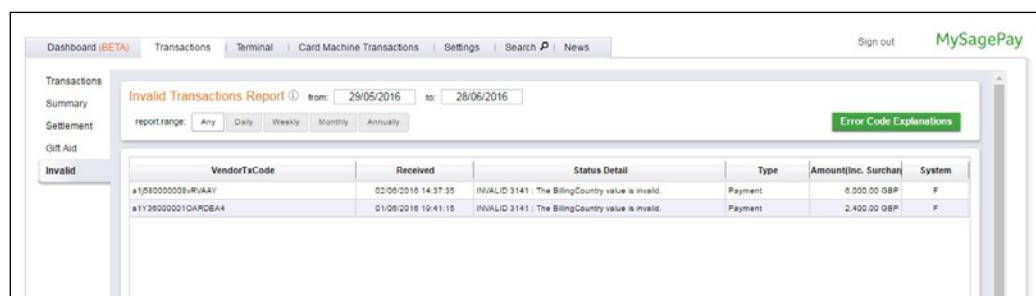
An Abort will cancel the transaction and prevent any funds from being taken. This is used if you no longer wish to process the transaction.

If you have a large amount of Deferred transactions processed through your account then bulk actions will save a lot of time by being able to Release or Abort multiple transactions at one time.

3.5 Invalid

The Invalid section of MySagePay provides you with a list of the invalid transactions that have been attempted on your account.

An invalid is a transaction that has not been registered with the Sage Pay system due to issues with the information that is being provided to us.



The screenshot shows the 'Invalid' section of the MySagePay interface. At the top, there's a navigation bar with links for Dashboard (BETA), Transactions, Terminal, Card Machine Transactions, Settings, Search, and News. On the far right, there are 'Sign out' and 'MySagePay' links. To the left, a sidebar lists 'Transactions Summary', 'Settlement', 'Gift Aid', and 'Invalid'. The main area is titled 'Invalid Transactions Report' with date filters set to 'from: 29/05/2016 to: 28/06/2016'. Below this is a 'report range' dropdown with options: Any, Daily, Weekly, Monthly, Annually. A green button labeled 'Error Code Explanations' is visible. The main content is a table with the following data:

| VendorTxCode | Received | Status Detail | Type | Amount Inc. Surchar | System |
|-------------------|---------------------|---|---------|---------------------|--------|
| a1080000008vRVAAY | 02/06/2016 14:37:35 | INVALID 3141 : The BillingCountry value is invalid. | Payment | 0.0000 GBP | P |
| a1Y3800001QARDEA4 | 01/06/2016 19:41:15 | INVALID 3141 : The BillingCountry value is invalid. | Payment | 2.4000 GBP | P |

This is commonly caused by the transactions being sent to Sage Pay by an IP address that has not been added to the account, or if the shopper has entered details that would cause an error to occur.

Another example of this is if the shopper enters example@example..com as the email address – the additional . will cause an error as this is not a valid email address.

Although this information is helpful there are no actions that you can take within MySagePay for invalid transactions. This area of MySagePay is for information only.



4.0 Search

If you want to find a specific transaction that has been processed through your account you have the ability to use the search section to locate this.

The search screen allows you to enter any part of the shopper's name (surname provides the best results) or address (numerical details) to locate a specific transaction.

If the Sage Pay systems return too many results, or not the results you were looking for you are able to refine the search further by selecting the advanced button in the top right hand corner of the screen.

MySagePay will then return a list of all transactions processed through your account that match your search criteria.

The search section can be used anytime you want to locate a transaction that is on your account.

You will then be able to refine the search further by entering the card type, authorisation code, transaction type, amount, and last four digits of the card.



5.0 Card Machine Transactions

If Sage Pay provide your business with your Card Machines along with your Website and Phone based transactions you will be able to view the transactions that have been processed through your card machine here.

All transactions that have been processed through your card machine will appear in this section and NOT in the Transaction section of your MySagePay.

Once the transactions have been processed through your card machine they will appear in MySagePay the following day.

There are no actions that you can take with the transactions that appear in this section.

The details of the transactions processed through your card machine are for information purposes only.



6.0 Terminal

The Terminal allows you to process Mail Order or Telephone Order (MOTO) transactions.

Before you can use the Sage Pay terminal you must have a MOTO (mail order/telephone order) Merchant Number assigned to your account.

If you have this in place already you will be able to use the Sage Pay terminal.

Once you have selected the Terminal section you are able to enter the details of your shopper as they are provided and process a transaction.

The screenshot shows the MySagePay terminal interface. At the top, there's a navigation bar with links for Dashboard (BETA), Transactions, Terminal, Card Machine Transactions, Settings, Search, News, Sign out, and the MySagePay logo. Below the navigation, a header says "Terminal" and provides instructions: "Use the Terminal to process mail order/telephone order (MOTO) payments." There are three tabs at the top left: "Billing Address" (selected), "Delivery Address", and "Advanced". The "Billing Address" tab contains fields for First name, Last name, Phone number, Email address, Address line 1, Address line 2, Town/City, Postcode, and Country (set to United Kingdom). A checkbox "Make Delivery Address same as Billing Address" is checked. To the right, there's a payment form with logos for VISA, American Express, MasterCard, and Discover. It includes fields for Amount (with GBP selected), Currency, Card number, Payment Type (dropdown), Expiry date (mm/yy), CVC (3 or 4 digit security code on back of card), Name on card, and Cardtype Surcharge (radio buttons for Default and Other). Below these are "Total Amount" and "Description" fields (set to "Terminal Payment taken by sagepay"). A "Make Payment" button is at the bottom right.

The first screen of the Terminal is for your shoppers billing information such as name, billing address, and postcode.

Along with this you will also see tabs for Delivery Address and Advanced, the Delivery Address tab is so you can enter an alternate address if the shopper would like the goods delivered elsewhere.

The screenshot shows the MySagePay terminal interface. On the left, there are tabs for 'Billing Address', 'Delivery Address', and 'Advanced'. The 'Billing Address' tab is selected, displaying fields for First name, Last name, Phone number, Address line 1, Address line 2, Town/city, Post/zip code, and County (United Kingdom). A checkbox indicates 'Delivery Address is same as Billing Address'. On the right, there is a card payment form with fields for Amount, Currency (set to GBP), Card number, Expiry date (mm/yy), CVC, Name on card, and Cardtype SurchARGE (Default or Other). Below these are fields for Total Amount and Description (Terminal Payment taken by sagepay). A 'Make Payment' button is at the bottom.

The Advanced tab enables you to change the unique transaction code (Vendor Tx code) for the transaction, change the payment type that is being used, and add a reference to the transaction.

You are also able to make changes to your fraud prevention tools for specific transactions without having to add or remove any features for all customers.

Once you are happy with all of the customer details you will move over to the right hand side of the screen and enter the amount and confirm the currency for the transaction.

This screenshot shows the 'Advanced' tab selected. It includes fields for Unique Tx code (T1-160628115442-151), Transaction type (set to PAYMENT), Reference, and Gift aid? (checkbox checked). Below these are options for applying A/S/C/V2 checks: Perform checks if enabled on account, Apply Rules if they exist; Force A/S/C/V2 checks regardless of account settings, Apply Rules if they exist; Disable A/S/C/V2 checks and Rules for this transaction only; and Force A/S/C/V2 checks but disable Rules for this transaction. The right side of the screen is identical to the previous screenshot, showing the card payment form and 'Make Payment' button.

You will then enter the customer's card details and select Make Payment. This will process the transaction and once completed add it to the transactions section within your MySagePay.



7.0 Customised Payment Pages

Having the ability to quickly edit your payment pages is fundamental to any business. Customised Payment Pages allows you to do just that.

7.1 Before you start using the Page Customiser

Before you can start using the Page Customiser to make any changes to your payment pages you will first need to ensure that your Sage Pay account is set to use the Responsive Payment Pages.

To do this you will need to log into your MySagePay account and go to the **Settings tab**. Once here, select Settings from the menu on the left of the page.

In the Account Settings box you will see **Payment page templates** – click the edit button for this and you can then select **Responsive** for the payment pages.

Edit display & general settings

Company display name:

Your full homepage URL:

Your support email address:

Send HTML emails to customers:

Default currency in Terminal:

Payment page templates: Default Address read-only No address Custom Responsive

Please note, mobile responsive templates are available for Protocol 3.00 integrations only

Update

Important : You will need to do this on both your test and live MySagePay platforms to use the Page Customiser, giving you the ability to test your pages before you add them to your live account.

You can then use Page Customiser. This can be found by logging into your MySagePay panel as a user with administrative rights. Once logged in click settings followed by Page Customiser from the menu along the left of the screen. This will open the Page Customiser where you can edit your payment pages.

7.2 What pages can I edit?

Types of pages

When making changes to your payment pages you have the ability to edit 3 types of payment pages

| | | |
|---------|--------|--------|
| Desktop | Mobile | iFrame |
|---------|--------|--------|

Desktop – These are the standard payment pages that will be seen when using desktop computer and some mobile devices with a large enough screen.

Mobile – These are the standard payment pages optimised for use with smaller mobile devices – mobile phones and tablets with smaller screens.

iframe – for customers using the Sage Pay Server method of integration. The iframe can be embedded into your own website giving the shopper the impression the entire payment process is being carried out on the your website.

Individual pages

When editing the payment pages for both desktop and iframe there are 3 payment pages that you can edit –

| | | |
|----------------|--------------|---------------|
| Card Selection | Card Details | Order Summary |
|----------------|--------------|---------------|

Card Selection page – here the shopper will select the payment type they will be using to make the purchase. They will be able to choose from all the payment methods available on your account.

The image shows two side-by-side payment selection interfaces. The left one is 'Desktop' and the right one is 'Mobile'. Both feature a header with company logo ('Your Company logo'), company name ('My Company Ltd'), and order details ('Order description: The best products from My Company Ltd', 'To pay £31.35'). Below this, a question 'How do you want to pay?' is followed by a list of payment methods. The Desktop version lists 'Pay with PayPal' (with a note about surcharge), 'Visa', 'Visa Debit', 'Visa Electron', 'MasterCard', and 'Debit MasterCard'. The Mobile version lists 'Pay with PayPal' (with a note about surcharge), 'Visa', 'Visa Debit', 'Visa Electron', 'MasterCard', and 'Debit MasterCard'. At the bottom of the mobile interface is a green button that says 'Your payment is secured by sage | pay'.

Card Details page – this page is used to capture the card details when the transaction is processed. Information such as Name, Card Number, and Security Code (CVC).

The image shows two side-by-side screenshots of the 'Your card details' page.
Desktop View: On the left, there's a logo placeholder ('Your Company logo') with 'My Company Ltd' below it. To the right, the main form has fields for 'Name' (with placeholder 'Fname Mname Surname'), 'Card' (placeholder '0000 0000 0000 0000'), 'Expiry' (placeholder 'MM / YY'), and 'CVC' (placeholder '123'). Below the form are 'Back' and 'Confirm card details >' buttons. A note at the bottom says 'Your payment is secured by sage | pay'.
Mobile View: On the right, the same fields are shown in a mobile-friendly layout. It includes a header bar with 'My Company Ltd' and a balance of '£31.35'. Below the fields is a large green 'Confirm card details >' button. At the bottom, there's a note 'Your payment is secured by sage | pay'.

Order Summary page – the final page is the summary page where the shopper can review their order before sending for authorisation.

The image shows two side-by-side screenshots of the 'Review your order' page.
Desktop View: On the left, there's a logo placeholder ('Your Company logo') with 'My Company Ltd' below it. To the right, the main form has sections for 'Transaction details' (with fields for 'Description' (The best products from My Company Ltd), 'Transaction Reference' (testvendor-1439375911979-629437), and 'Amount' (£31.35)), and expandable sections for 'Your Shopping Basket', 'Payment Details', and 'Billing Address' (each with a '+' sign). Below the form is a note: 'When you click pay now you may be asked by your card issuer for payment card verification.' followed by logos for 'SecureCode', 'MasterCard', 'Verified by VISA', and 'Amex'. At the bottom are 'Back' and 'Pay £31.35 now >' buttons. A note at the bottom says 'Your payment is secured by sage | pay'.
Mobile View: On the right, the same layout is shown in a mobile format. It includes a header bar with 'My Company Ltd' and a balance of '£31.35'. Below the fields is a large green 'Pay £31.35 now >' button. At the bottom, there's a note 'Your payment is secured by sage | pay'.

If you are using Sage Pay Server integration with the iFrame on your website you will only be able to edit one page. This is the Card Details page.

Both the Card Selection and Order Confirmation pages are not available if you are using Server iFrame integration.

Your card details

| | | |
|--|--------|---------------------|
| | Name | Fname Mname Surname |
| | Card | 0000 0000 0000 0000 |
| | Expiry | MM / YY |
| | CVC | 123 |

[Confirm card details >](#)

[◀ Back](#)



7.3 Editing your pages

To begin editing your payment pages you will first need to select the page you would like to change. Once chosen you can then edit the page using the options available in the menu on the left of the page.

These options allow you to change the look and feel of your payment pages.

The screenshot shows a user interface for customizing payment pages. On the left, there's a sidebar with a grey border containing several sections: 'General', 'Progress Indicator Colour', 'Fonts', and 'Buttons'. Each section has a title and a color swatch followed by a descriptive text. At the bottom of the sidebar are two buttons: 'Reset' (orange) and 'Publish' (green). The main area is a large white space where the changes take effect.

| Section | Setting | Description |
|---------------------------|-------------------|--|
| General | Background Colour | Change the background colour of your Sage Pay payment pages. |
| | Header Colour | Change the colour along the top of the payment pages. |
| Progress Indicator Colour | Completed | Change the colour of the completed progress image at the top of the payment pages. |
| | Current | Change the colour of the current progress image at the top of the payment pages. |
| | Future | Change the colour of the future progress image at the top of the payment pages. |
| Fonts | Title | Select the font type to be used for the titles throughout the payment pages. |
| | Body | Select the font type to be used for the text on each of the payment pages. |
| Buttons | Background | Change the background colour of the buttons on the payment pages. |
| | Foreground | Change the colour of the text within the buttons. |
| | Outline | Change the colour of the button borders on the payment pages. |

Any change you make to one page will be applied to all payment pages – you cannot have multiple designs across each individual page.

Find out more about Customised Payment Pages here: [↗](#)



8.0 MySagePay Dashboard

Your MySagePay dashboard puts your transactional activity and volumes at your fingertips. Each time you log into MySagePay you will have the option to view the Dashboard and see your activity.

The MySagePay Dashboard is only available to businesses with less than 10,000 transactions

8.1 What will I see?

A breakdown of your recent transactional activity, including:

- Total Sales – a value of all sales for a given time frame.
- Average sales value - the average transaction value of your transactions
- Number of sales – a total number of transactions processed through your account.

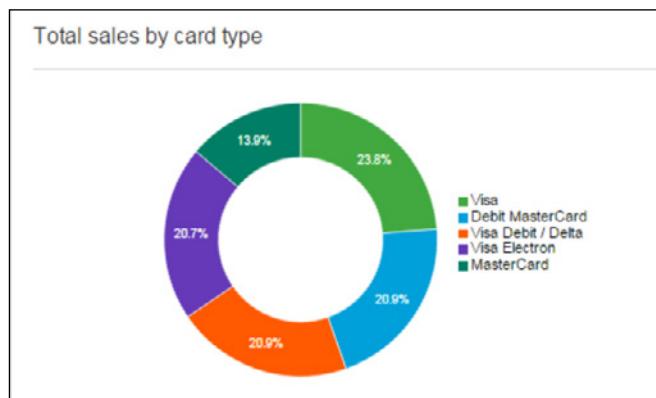


You will also be able to see 4 graphics on the page:

Total sales by card type

On the total sales by card type your chart will be divided into sections based on the card types used for your transactions.

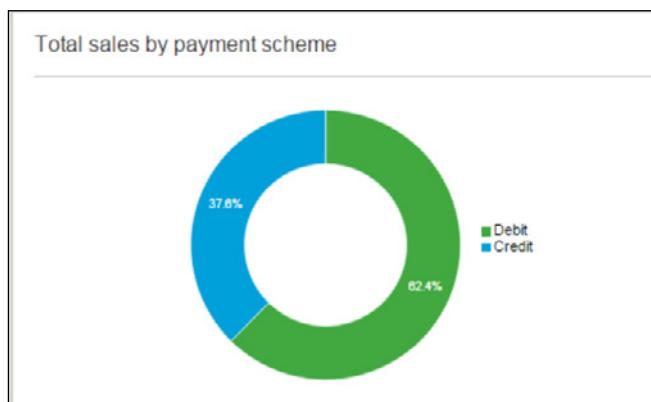
The totals will be broken down to show you the percentage each card has been used compared to your total number of sales.



Total sales by payment scheme

This chart will show you the split between debit and credit cards for the transactions that have been processed through your account.

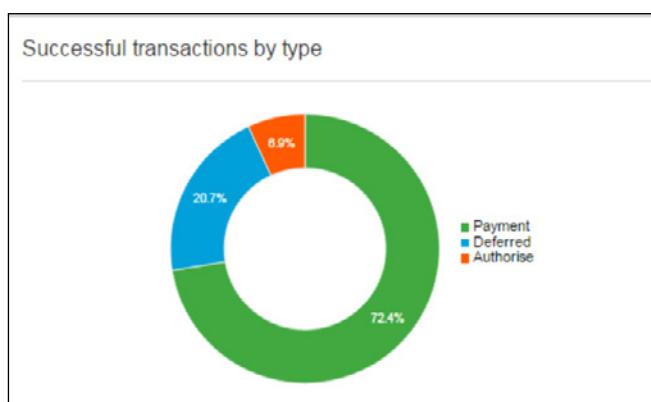
Broken into percentages you will be able to clearly see the dominant payment scheme used to transact through your business.



Successful transactions by type

On this chart you will see all of the different transaction types that are used through your Sage Pay account.

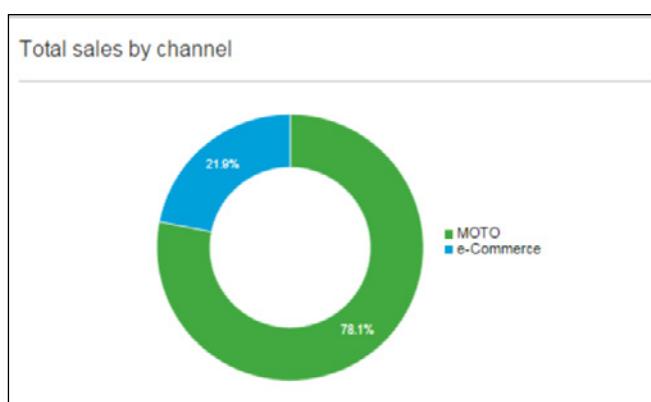
The breakdown will also provide information on the volume of transactions processed compared with the volume of transactions refunded.



Total sales by channel

An overview of the total sales by channel provides you with a breakdown of the types of transaction that have been processed through your account:

- Ecommerce – transactions processed through your website
- MOTO – any transactions processed through MSP or your own back end office platform



I want to see monetary values not percentages

If you would like to view the monetary value of a specific breakdown on any of the charts you simply need to place your mouse over the section or the title in the legend.

Will every user be able to see the Dashboard?

Yes at this time it will be available to all users or none. However, we will shortly be releasing a User Permissions feature to the Dashboard within MySagePay that will allow you to manage which users can access the Dashboard.

Find out more about your MySagePay Dashboard or what to do if you don't have one here: [↗](#)

WITH YOU 24/7

We understand that your business never sleeps that's why our **FREE UK based** support team are here to help you 24/7:



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