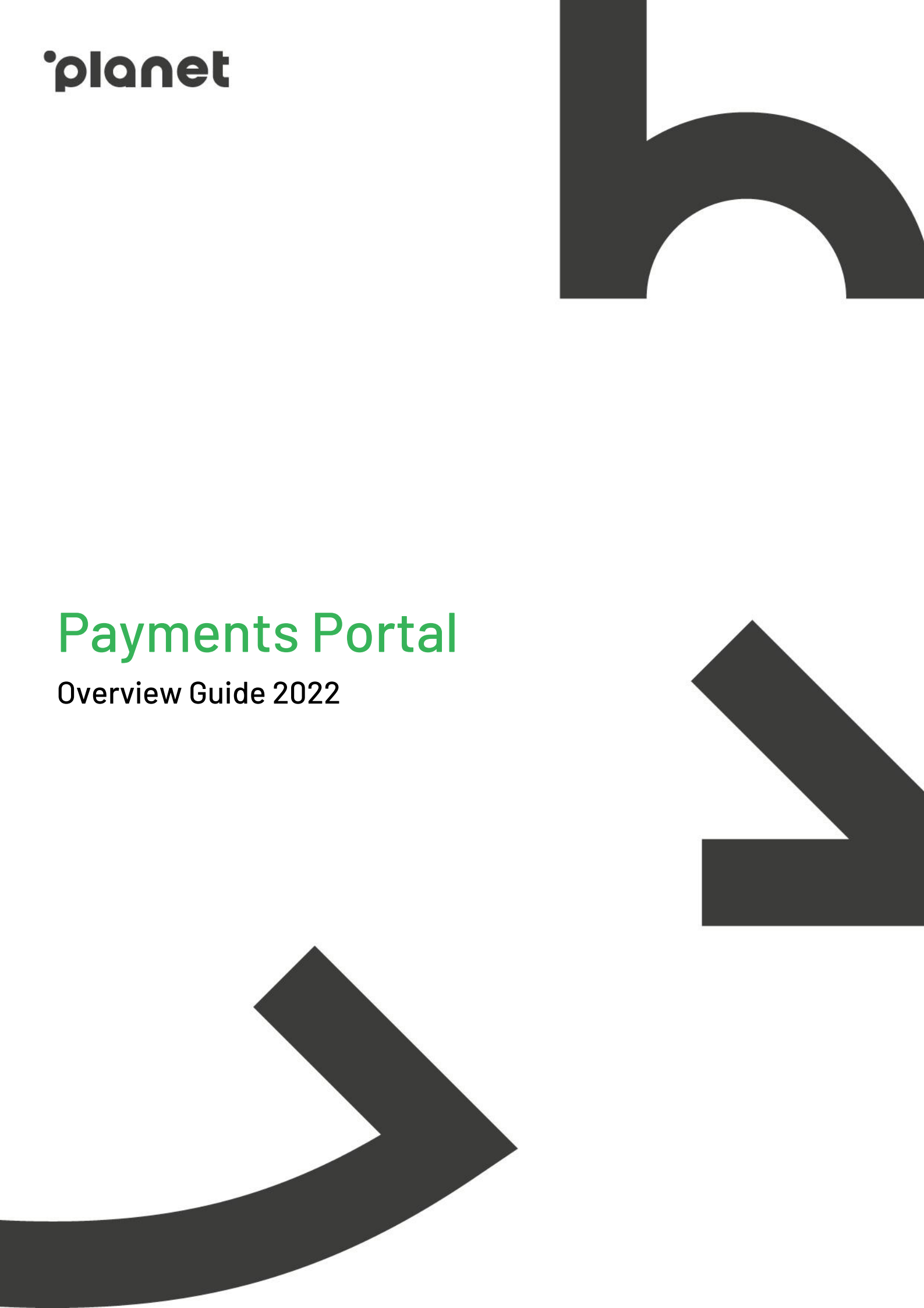




Payments Portal

Overview Guide 2022



What is the Payments Portal?

The payments portal provides a comprehensive view of all payment data processed through Planet payment 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 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, MS Edge, Opera.

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General Login

1. Access the portal via the internet using the URL:

[Payments Portal :: Home](#)

Welcome to the Payments Portal

Language Preference* English ▼

Please log in to begin

OR

Login using SSO

2. Click on 'Please Log in to begin' or login using SSO depending on your company set-up

SSO (Single Sign On) is only available for specific merchants and would need be to configured by Planet Customer Support team. Most general users should ignore SSO and **click log in to begin**.

3. Enter the Username and Password provided by Planet Customer Support team.

Note: 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 to login with the new password. New passwords must be different from the previous twenty-four (24).

Passwords cannot be changed more than once per day.

Login Screen:

Welcome to the Payments Portal.
For more information about Planet and our solutions visit
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 team. This 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 log in screen. This information will be sent by the master user at the merchant location for first login with credentials. If incorrect, the user will be prompted to retry or contact Planet support team. Users are locked out of the portal after 3 failed sign in attempts and must reset their password. Contact support.help@planetpayment.com for assistance.

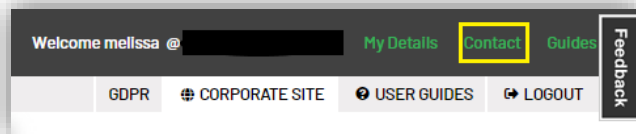


Home Page

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		
Western Europe	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
UK & Ireland		+44 203 514 3808
Nordic Countries		+46 101 992 582
Rest of Europe		+352 2020 2142
North America		
USA & Canada		+1 888 336 7778
Asia		
Middle East	Qatar	+352 2020 2499
	United Arab Emirates	+971 800 035 704437
Australia		
Australia	General Helpline	+352 2020 2499
Support Email	General	support@3cpayment.com
<p>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:</p> <p>311 (English) 312 (French) 313 (German) 314 (Spanish) 315 (Italian)</p>		

This screen displays the latest release information including version and release notes.

HOME

PAYMENT GATEWAY

ONLINE PAYMENTS

VIRTUAL TERMINAL

TOKEN

MY SERVICES

You are now logged in

planet

that payment moment

v2.0.0.62 Release highlights:

Changes on Pay by link page, added new fields

User guides per language and per services enabled

Performance fix and bug fixes

Dear Customer: In order to improve the quality of service please be sure to provide the correct LocationID from the list below when contacting customer support.

LOAD LIST

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.

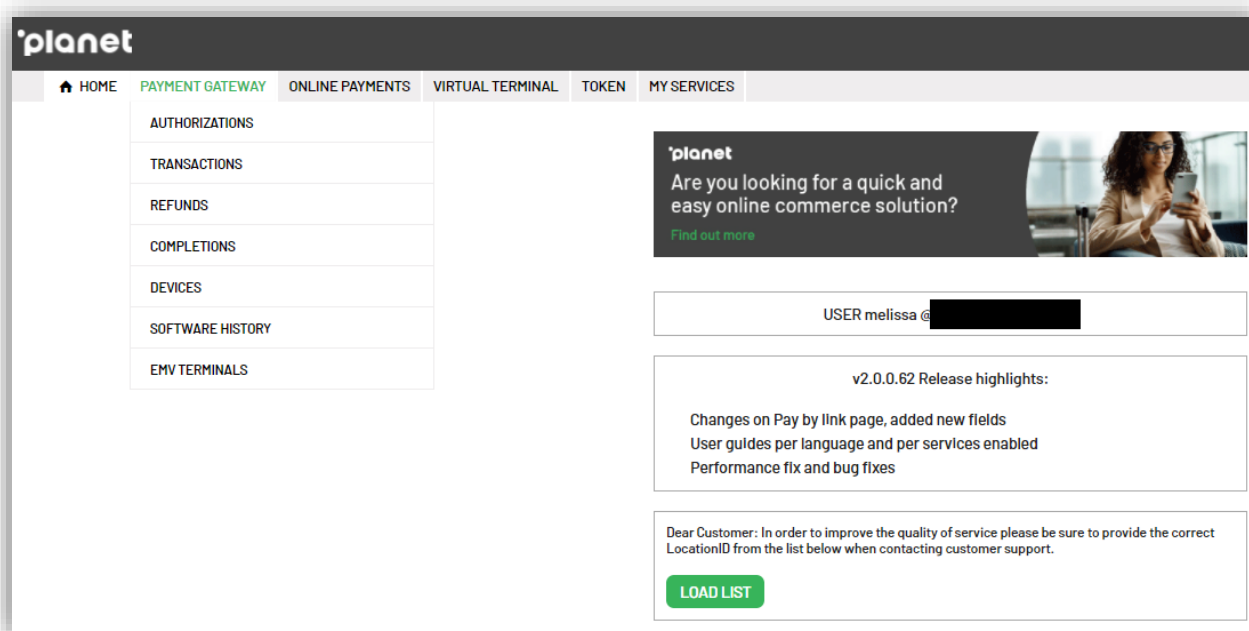
On the Home Page the merchant's name will appear in the banner at the top right of the screen in addition to the centre.

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

Payment Gateway

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

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



Authorisations

This will allow the user to view a page showing all real-time authorisations 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.

planet

Welcome melissa @ [redacted] My Details Contact Guides

HOME PAYMENT GATEWAY ONLINE PAYMENTS VIRTUAL TERMINAL TOKEN MY SERVICES

GDPR CORPORATE SITE USER GUIDES LOGOUT

Payment Gateway Authorizations

Date: Today First 6 of Card: Last 4 of Card: Card Type: <Any> Receipt Language: English Method: <Any> SEARCH Show Advanced Search Fields

Page 1 of 4 100 per page View 1 - 100 of 331

Actions	Location	LocationID	UserTransRef	TransDate	LocCurrenc	Currency	Amount	Method	CardType	CardNumber	AuthCode	Response	PosEnvironment
New Pay		337018		02/24/22 04:55:17	GBP	GBP	262.92	Completion	MASTERCARD			Approval	Attended POS
New Pay		337018		02/24/22 07:22:52	GBP	GBP	1,672.06	Completion	MASTERCARD			Approval	Attended POS
New Pay		337019		02/24/22 18:55:19	GBP	GBP	10.69	Sale	VISA			Approval	Attended POS
Reverse		337019		02/24/22 15:42:21	GBP	GBP	139.50	Authorisation	AMEX			APPROVAL	Attended POS
New Pay		337018		02/24/22 14:49:45	GBP	GBP	-128.87	Sale	VISA DEBIT			Approval	Mail/Telephone Order
New Auth		337018		02/24/22 10:31:23	GBP	GBP	-200.00	Sale	VISA DEBIT			Approval	Mail/Telephone Order
New Refund		337019		02/24/22 13:37:06	GBP	GBP	28.02	Sale	VISA			Approval	Attended POS
View Receipt		337019		02/24/22 21:16:22	GBP	GBP	10.13	Sale	MASTERCARD			Approval	Attended POS
New Pay		337018		02/24/22 17:02:09	GBP	GBP	-343.41	Sale	MASTERCARD			Approval	Mail/Telephone Order
Reverse		337018		02/24/22 14:46:00	GBP	GBP	833.82	Pre-Authorisation	AMEX			APPROVAL	Attended POS
New Pay		337018		02/24/22 13:12:17	GBP	GBP	503.88	Completion	VISA DEBIT			Approval	Attended POS

Merchants who have several locations and multiple countries can click the “Location” button magnifying glass icon on the right side at the top within 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.

GDPR CORPORATE SITE USER GUIDES LOGOUT

Location

Simple Advanced

No records to view

Filter Location(s)...

Country

United-Kingdom

- 332796: ### [redacted] London
- 332797: ### [redacted] London FB
- 332804: ### [redacted] London SPA
- [redacted] London - FO Planet
- [redacted] London - SPA Planet
- [redacted] London FnB
- [redacted] London Spa - [redacted]

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

Shown below are the Completion results for “Today” filter. Users can choose any date to search by. Apply first 6, last 4 card digits or a specific date or card type to find the transaction.

The completions tab allows merchants to verify and confirm if a payment has processed 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 of these report screens.

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Welcome melissa @ [redacted] [My Details](#) [Contact](#) [Guides](#)

HOME PAYMENT GATEWAY ONLINE PAYMENTS VIRTUAL TERMINAL TOKEN MY SERVICES GDPR CORPORATE SITE USER GUIDES LOGOUT

Payment Gateway Completions

Date: Today First 6 of Card: Last 4 of Card: Card Type: <Any> Receipt Language: English ☐ Include Reversed ☐ Show Advanced Search Fields ☐ Simple ☐ Advanced Location: [redacted]

Page 1 of 4 100 per page

View 1 - 100 of 367

Location	LocationID	TransRef	TransDate	ShiftDate	Currency	Amount	LocalCurrent	LocalAmount	CardType	CardNumber	ExpDate	UserTransRef	UserRef	UserData1	AuthCode	TerminalID
[redacted]	337018	[redacted]	02/24/22 21:38:07	02/24/22	GBP	390.25	GBP	390.25	MC	[redacted]	[redacted]	[redacted]	LHRSFC0001	WKSJLHRSFC000180S	[redacted]	33701802
[redacted]	337018	[redacted]	02/24/22 21:14:48	02/24/22	GBP	123.00	GBP	123.00	MC	[redacted]	[redacted]	[redacted]	WKSJLHRSFC000390S	[redacted]	[redacted]	LHRSFC0003
[redacted]	337018	[redacted]	02/24/22 20:51:45	02/24/22	GBP	3.50	GBP	3.50	AX	[redacted]	[redacted]	[redacted]	WKSJLHRSFC000390S	[redacted]	[redacted]	LHRSFC0003
[redacted]	337018	[redacted]	02/24/22 20:50:29	02/24/22	GBP	11.00	GBP	11.00	MC	[redacted]	[redacted]	[redacted]	WKSJLHRSFC000390S	[redacted]	[redacted]	LHRSFC0003
[redacted]	337018	[redacted]	02/24/22 20:48:04	02/24/22	GBP	2.50	GBP	2.50	AX	[redacted]	[redacted]	[redacted]	WKSJLHRSFC000390S	[redacted]	[redacted]	LHRSFC0003
[redacted]	337018	[redacted]	02/24/22 20:48:05	02/24/22	GBP	2.50	GBP	2.50	MC	[redacted]	[redacted]	[redacted]	WKSJLHRSFC000390S	[redacted]	[redacted]	LHRSFC0003
[redacted]	337018	[redacted]	02/24/22 20:45:34	02/24/22	GBP	26.00	GBP	26.00	AX	[redacted]	[redacted]	[redacted]	WKSJLHRSFC000390S	[redacted]	[redacted]	LHRSFC0003
[redacted]	337018	[redacted]	02/24/22 20:44:35	02/24/22	GBP	76.50	GBP	76.50	AX	[redacted]	[redacted]	[redacted]	WKSJLHRSFC000390S	[redacted]	[redacted]	LHRSFC0003
[redacted]	337018	[redacted]	02/24/22 20:41:11	02/24/22	GBP	3.50	GBP	3.50	UD	[redacted]	[redacted]	[redacted]	WKSJLHRSFC000390S	[redacted]	[redacted]	LHRSFC0003
[redacted]	337018	[redacted]	02/24/22 20:24:18	02/24/22	GBP	42.50	GBP	42.50	AX	[redacted]	[redacted]	[redacted]	WKSJLHRSFC000390S	[redacted]	[redacted]	LHRSFC0003
[redacted]	337018	[redacted]	02/24/22 20:22:31	02/24/22	GBP	972.85	GBP	972.85	UD	[redacted]	[redacted]	[redacted]	LHRSFC0003	WKSJLHRSFC000390S	[redacted]	33701803

Transactions – Similar, but different to completions, this will allow the user to view a page showing all transactions which have been 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 during the early morning hours next day (T+1) between 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 authorisations and transactions screens allow users to initiate several follow on actions based on individual authorisation events including: new payments, new refunds, new authorisations, 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.

Payments Portal :: Payment Gateway - Work - Microsoft Edge

about:blank

Receipt

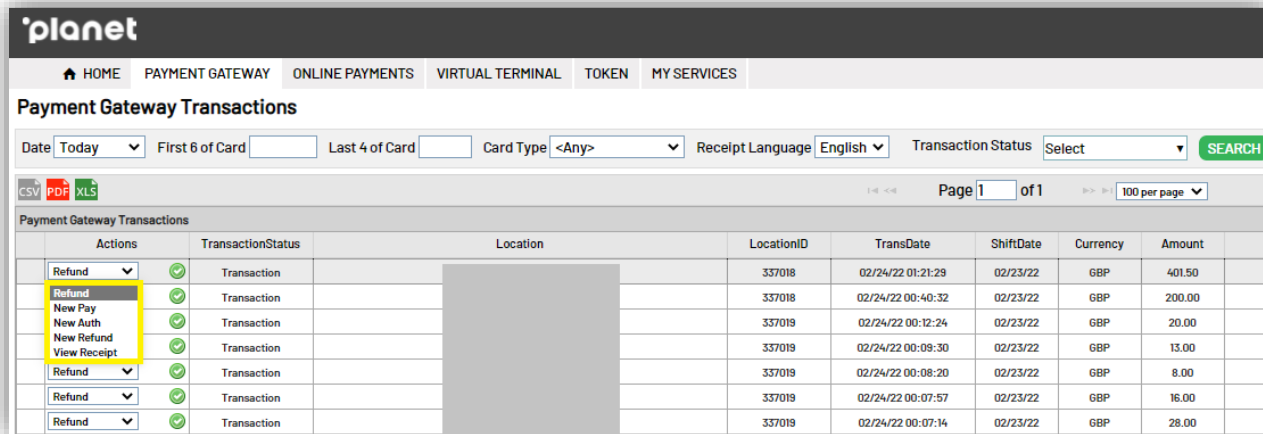
Completion

Merchant Name: [redacted]
Transaction Date: Wed, May 11, 2022, 02:29:09 AM
Merchant Address: [redacted]

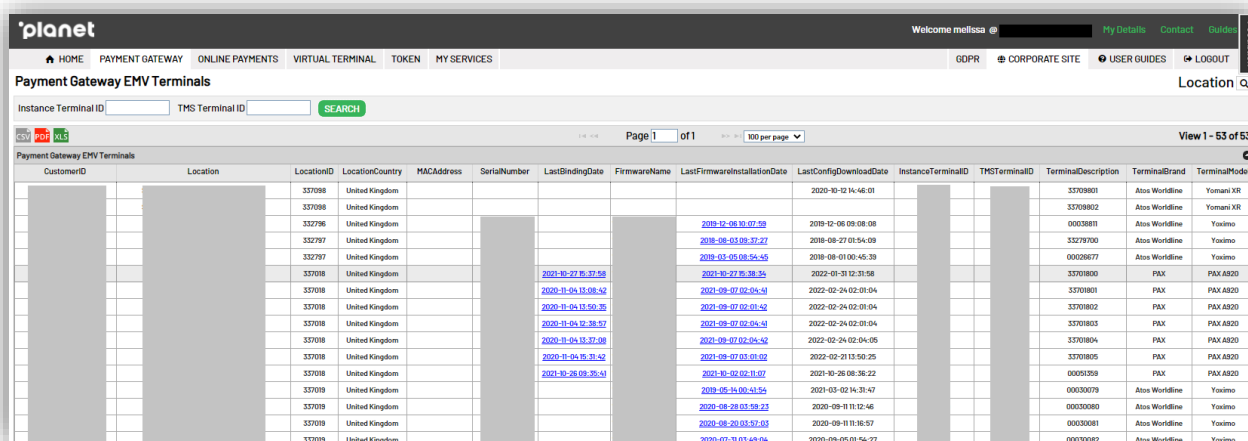
Card Type: VISA DEBIT
Card Number: 475129*****2547
Amount: GBP 26.00
Auth Code: [redacted]
Transaction Ref: [redacted]
Transaction Type: DEBIT
Card Read Method: OCR, Key Entered

Transaction Status: DONE
Approval
Merchant ID: [redacted]

VAT No.: [redacted]



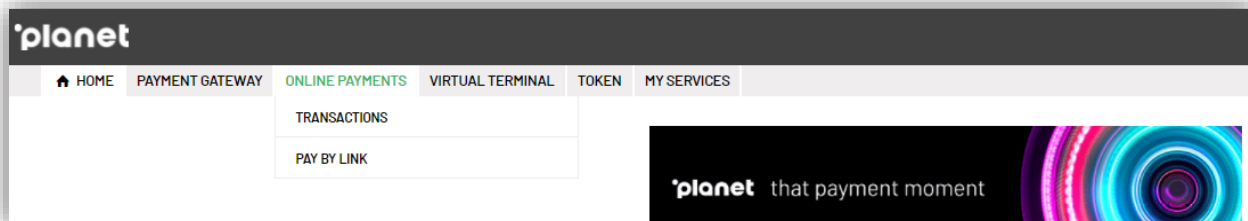
The EMV Terminal page supports filtering at the top by Terminal ID. This shows all terminal details and information for deployed hardware in the merchant locations.



Online Payments

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 utilising the Pay by Link product.



The transaction tab shows transactions which have been processed for payment. It also allows the issuing of a full refund 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), preauthorisation, captures and view receipt for users who are allowed these permissions.

Online Payments Transactions	
Actions	
Refund	✓
Refund	✓
Refund	✓
Refund	✓

Pay by Link

The Pay by Link solution allows merchants to create payments and provide a secure URL link to their customers to action payments. When customers click the link they are taken via a browser to a secure payment page to complete the payment.

planet											
Welcome Andrew @ SeaContainerLondon My Details Contact Guides Feedback											
HOME PAYMENT GATEWAY ONLINE PAYMENTS VIRTUAL TERMINAL MY SERVICES GDPR CORPORATE SITE USER GL											
Pay By Link											
<div> <div>ESV</div> <div>RDP</div> <div>KLS</div> </div>											
Online Payments											
Actions	eMerchantID	PayByLinkID	Type	Status	CurrencyID	Amount	Template	RequesterRefNo	Userdata1	Userdata2	User
Edit		CC827371-32AE-4A28-B922-2257A767473F	Single	Complete	GBP	446.04					
Edit		E9128838-66FD-40DE-B9EA-FB030E724C8C	Single	Active	GBP	120					
Edit		A5730F3D-1758-4693-AAEC-7A58A70534FE	Single	Active	GBP	1500					
Edit		A7AC80AE-68D0-49FB-9674-CF8EA091D5DC	Single	Complete	GBP	36					
Edit		6B74D79D-F771-4022-BF57-7A0ADC5FD296	Single	Complete	GBP	336					

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="Andrew.Reilly@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"/>

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

Virtual Terminal

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

planet

HOME PAYMENT GATEWAY ONLINE PAYMENTS VIRTUAL TERMINAL TOKEN MY SERVICES

TRANSACTIONS

AUTHORIZE

PAY

REFUND

SETTLE

planet that payment moment

USER melissa @SeaContainerLondon

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 authorisations, sales, issue refunds and settle (complete) transactions using a valid authorisation code obtained separately. Minimal card details are required. In addition reference data can be optionally entered to note specifics about the payment for accounting purposes.

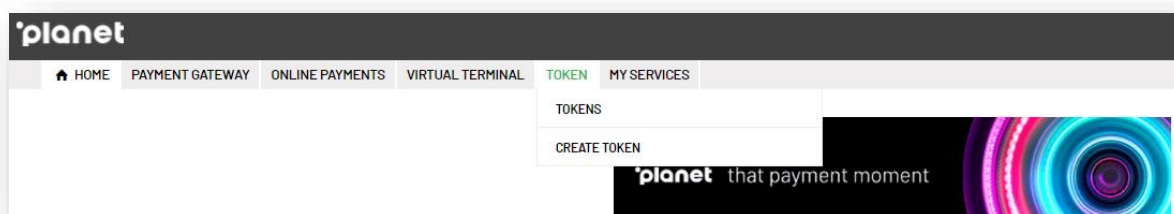
The transactions tab allows users to view the history of all Virtual Terminal transactions processed.

Tokens

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

From the list of tokens users can take actions including retrieve, search and manage the token data, initiating new payments, new authorisations and refunds to customers.

(Please refer to our Virtual Terminal guide for more information.)



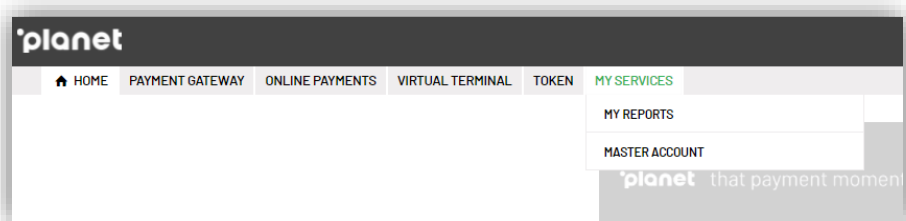
My Services: Reporting and User Permissions

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.

MyReports supports 3 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 hr business day)
3. Transaction Date = actual transaction timestamp date itself

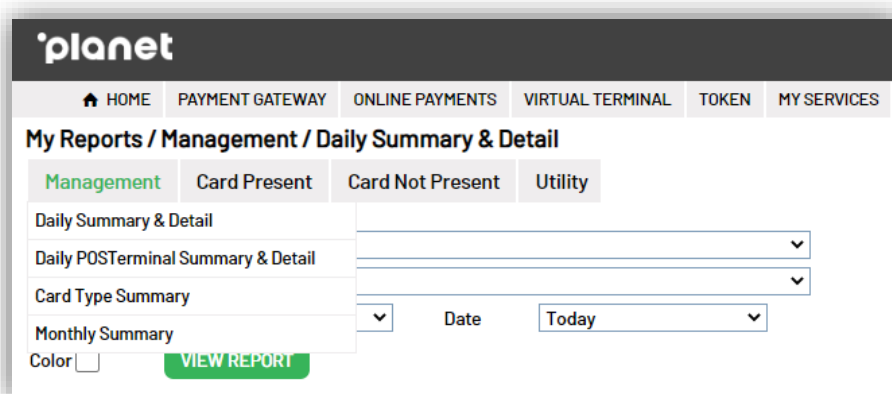


Types of reports:

Users can generate reports by revenue centre with customised hierarchies. There are many reports with different options available. Reports are configured against users login based on account type and services. The following table contains a list of the most common reports along with a brief description of its purpose.

Daily Summary and Detail	Provides a daily summary of transactions processed, broken down by location, card type and currency. It also includes a separate page showing each individual transaction per location.
Daily DCC Summary and Detail	Same as the "Daily Summary & Detail" but also provides a summary breakdown by card entry mode, DCC capable 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 individual transaction per Terminal and Location.
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.

The Management tab offers a daily summary report for Card Present and Card Not Present Transactions all together.



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 4 or last six digits of the credit card number or by entering the authorisation code.

Master Account Management

The Master Account page offers merchants user management within the portal including assigning and editing user permissions.

Master Users can create new users, edit user details, delete users and refine actions and specific permissions for each user.

(Please refer to our user guide in the portal for more information)

This Master Users account functionality allows Master Users to manage their own team of users and prevents extra Setup costs. We can supply one or more Master User Accounts.

User Types and Permissions

3 types of Users exist:

- Basic User

- Permissions: view/consult only, print/email transaction receipt
- Advanced User
 - Permissions: view/consult only, print/email transaction receipt
 - Actions: transaction refund, authorization reversal.
- Master User
 - Permissions: view/consult only, print/email transaction receipt
 - Actions: transaction refund, authorization reversal and User Management Master Account can manage creation, deletion or editing of users. (User Guide available in Planet Gateway Portal User Guide Tab)

This allows you to manage your own user needs without dependency on Planet. Also, it eliminates extra user setup costs by managing this through your master user account. Planet can supply 1 or more Master User Account. Above permissions are standard according to user type. Planet can however adapt different types of permissions by user level.