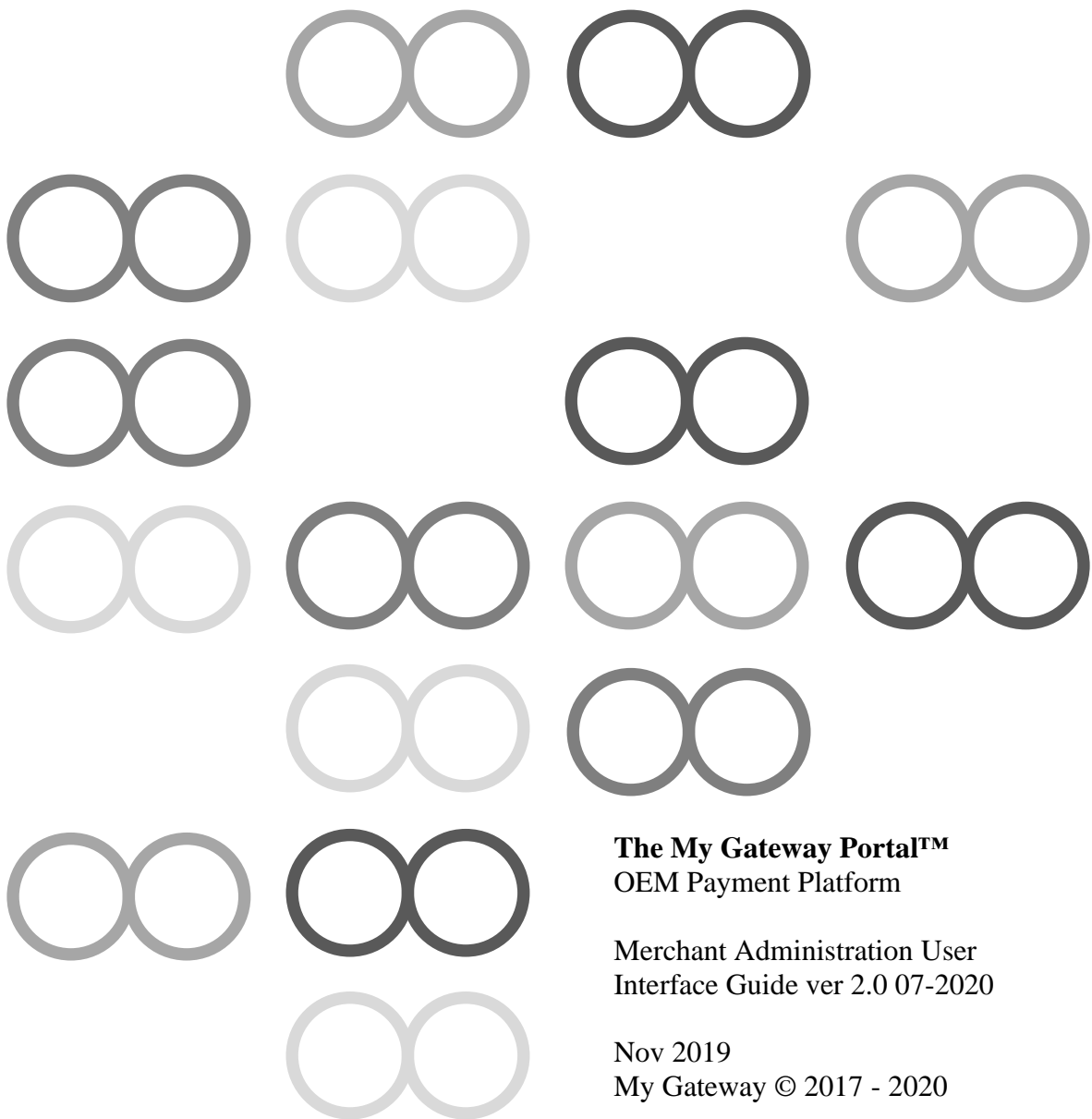




The My Gateway Portal™ Merchant Administration User Interface Guide



**The My Gateway Portal™**  
OEM Payment Platform

Merchant Administration User  
Interface Guide ver 2.0 07-2020

Nov 2019  
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# **Summary of Changes**

## **ver 2.0 07-2020**

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Industry Briefs, April 2020  
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# 1. Introduction

My Gateway has implemented a Payment Gateway facility to enable merchants and processors to accept common payment cards for Electronic Commerce (EC) and Point of Sale (POS). This Manual is specific to EC merchants only.

The service is known as the My Gateway Switch, and provides a high function payment service that simplifies the payment acceptance process. The My Gateway Switch provides an outsourced proposition to acquirers, merchants and payment processors (collective referred to as *Payment Service Providers* or PSPs in this document) for this payment services.

The My Gateway Switch consists of internet front-end payment and account management functions and an on-line administrative platform to a web hosted application. This document details the online administration functions, known as My Gateway Portal Merchant Administration (MYGW-MA). For information on the payment and customer account management functions refer to the *My Gateway Product Services Guide for E-commerce Merchants and Processors*.

The Merchant Administration (MYGW-MA) functions of My Gateway Portal allow users to monitor, manage and report on transactions made through the My Gateway Switch. This is done by logging onto a web-based user portal and navigating through a series of easy to use screens using any standard web browser.

In this manual all users of the MYGW-MA system are generically referred to as *users*, though they may include Merchants, Payment Service Providers (PSPs), Third Party Processors (TPPs) and Acquirers.

## **1.1. Requirements**

To use MYGW-MA, users will need:

- A Merchant Abbreviation
- A User ID and relevant password
- Access to the Internet through a common browser such as Edge, Chrome or Firefox. Less common browsers may also work, but not all may have been tested
- JavaScript enabled



## **1.2. Target Audience**

This manual is aimed at merchants, PSPs, acquirers and operations staff who need to use the MYGW-MA service and assumes knowledge of web application usage, payments processing through the My Gateway Switch payment gateway and the processes used by the applicable merchant or PSP.

### **1.3. Related Documentation**

While this document details the online administration functions, MYGW-MA; for information on the payment and customer account management functions of My Gateway Portal, refer to the *My Gateway Product Services Guide for E-commerce Merchants and Processors*.

## **1.4. Support**

For any questions or assistance with the MYGW-MA product, please contact your support team at the support email provided at enablement e.g. *supportXX@my-gateway.net*, where *XX* is unique to a particular user.

## 2. Product Description

### 2.1. Services Provided to the Users

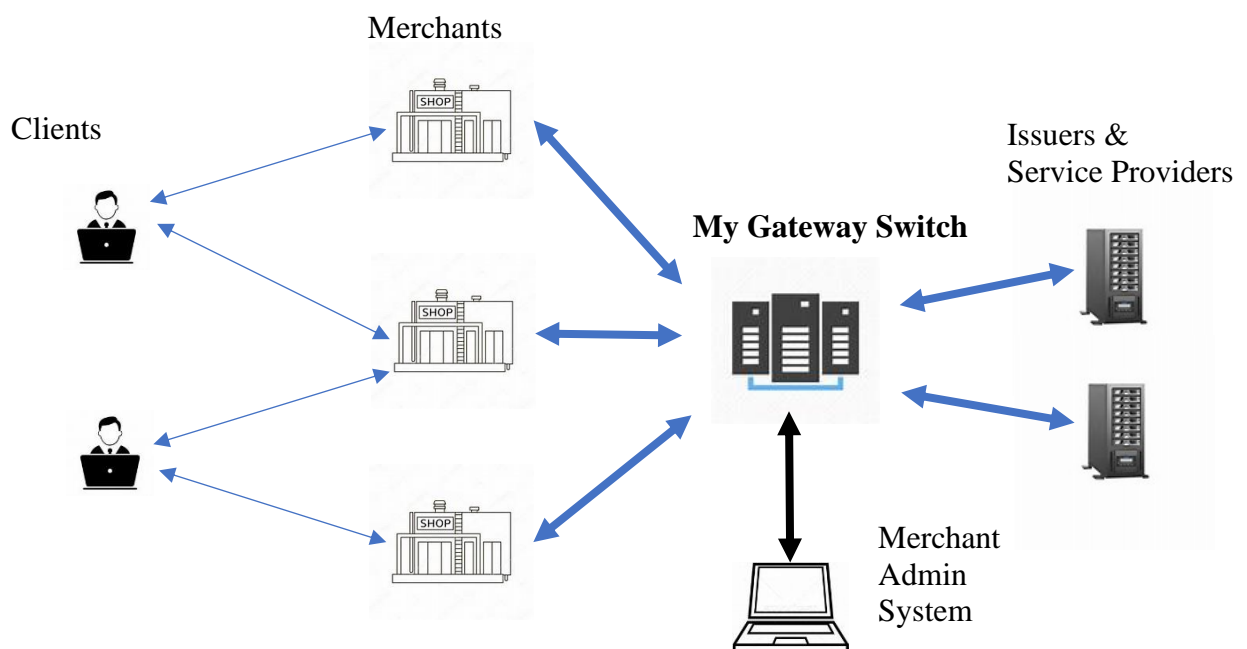
The services provided to users by the My Gateway Switch through the hosted platform are functionally divided into the following groups:

1. Merchant Administration Functions
2. Client and User Account Management
3. Transaction Analysis and Management

The *Client Account Management* service is also accessible using a Web-Services Application Programming Interface (API) style connection mechanism. This interface and associated APIs are documented in the *My Gateway Product Services Guide for E-commerce Merchants and Processors*.

The *Merchant Administration* functions are described in this document.

For reference, the following diagram describes the My Gateway Switch system.



*Figure 1. My Gateway Architecture*

### 3. Merchant Administration System (MYGW-MA)

Enablement for on-line payments is part of the My Gateway product for merchants. The user may also want to perform other payment management functions such as manually creating users and clients, checking transaction details and totals, and creating reports.

The MYGW-MA Merchant Administration facility manages this by providing the user with secure browser access to the MYGW-MA central transaction database to perform day-to-day merchant functions. The merchant is provided with tools for searching, reporting and managing client accounts and payment transactions.

In the following sections MYGW-MA web pages are displayed in italics (e.g. *MYGW-MA Home* page); and user input fields, check boxes, keys or buttons are in bold between angle brackets (e.g. <**Submit**>).

### 3.1. MYGW-MA Functions

The key features of MYGW-MA include:

- MYGW-MA has various types of user with different privileges and rights to access the information provided by the system. These are detailed below under *Managing MYGW-MA Operators*.
- Users may use the MYGW-MA system to manage their own users and clients' details. Users and clients can be added to the user or client database and existing users' and clients' details can be changed or deleted.
- Users may perform interactive searches of their own transaction logs and download detailed information about specific transactions. Searches can return a single transaction or a range of transactions.
- Each transaction has the functionality to show all details (e.g. authentication codes, fees, client details).
- MYGW Documentation, settlement and other reports may be downloaded from the MYGW-MA Portal.
- User access is secured using 128-bit SSL. The user is identified by an ID and password.
- Multiple user operators can be created and granted different privileges based on responsibility levels.

In addition to the MYGW-MA Portal, merchants can use the MYGW-AM and MYGW-PM functions described in the *My Gateway Product Services Guide for E-commerce Merchants and Processors* to directly access the MYGW-MA server from within their business application to perform client and user management and payment related functions.

Both methods allow use of a common merchant administration process. All transactions are presented in one database.

## 3.2. Getting Started with MYGW-MA

MYGW-MA allows the user, as an authorised operator, to monitor and manage their electronic transactions. Authorised operators can log in to MYGW-MA from the *Merchant Administration Login* page. Once logged in, they can use the various features of MYGW-MA.

### Test and Production Portals

My Gateway provides PSPs, acquirers and merchants with a *Test* platform and a *Production* platform; generally, the test platform is used to ensure that the users' systems are properly enabled for My Gateway Switch processing; before the user begins to process live transactions on the production platform. Similarly, MYGW-MA provides a test portal where test merchants, clients and transactions can be managed and a production portal where production merchants, clients and transactions are managed. Users will be given access to the test, production or both portals depending on which system(s) they are required to manage.

Authorised user personnel must be set up as users before they can log in. Users will be provided with URL, user ID and password details for the relevant (test or production) MYGW-MA portal as part of the enrolment process.

### The Portal User Interface

As the menu options listed below are self-explanatory and rely on user known or generated information, the details of each item is not described below. However, the MYGW-MA system provides context sensitive information for each field, available by placing the cursor on the relevant field or input box.

The administration options available to you depend on the features provided as part of the MYGW-MA enrolment process. The options available to users will also depend on the specific user's privileges and all the options described below may not be available to all users.

The MYGW-MA user interface is based on

- **Lists** – Tables of information specific to Merchants, Users, Clients and Transactions which the current user has access to.
- **Forms** – Used to query, create, view or change merchant, user, client and transaction data retrieved from the MYGW-MA server.

Any number of Lists and Forms can be open and displayed on the main MYGW-MA web page simultaneously. MYGW-MA uses menus, buttons, text fields and icons to get input from the user.

MYGW-MA uses notification boxes to notify users of important messages and errors as well as to confirm user's input choices when required.

- **Alert Box** – general information to alert on user interface events, for example data being received from the MYGW-MA server. Alerts are blue in colour.

- **Confirm Box** – used to confirm user input, for example to confirm deletion of a client or user. Confirms are green.
- **Warning Box** – used to notify the user of an error or warning condition, for example a user attempting to perform a MYGW-MA function for which they do not have sufficient access rights. Warnings are red.
- **Information Box** – used to provide the user with important required information, for example new User login details, new Merchant IDs and new Client gateway IDs. Information boxes are white.

If Confirm Boxes are closed by clicking on the <**OK**> button or pressing the <**Enter**> or <**Space**> keys; the action being confirmed is accepted and processed. If a Confirm Box is closed by clicking the <**Cancel**> button or pressing the <**Esc**> key, the action is cancelled, and the user is returned to the previous page or form.

All other boxes can be closed by clicking on the <**OK**> button or pressing the <**Enter**>, <**Esc**> or <**Space**> keys.



### 3.3. Logging In

To access the administration functions the user must navigate to the MYGW-MA URL, choose whether they are logging into the test or production portal, enter their merchant abbreviation, username and a password.

Note that merchant abbreviations, usernames and passwords are not common to the test and production portals and users will only be able to use their credentials to login to either the test or production portals, and not both. The required portal is chosen from the dropdown menu, **<Portal Platform>**.

If the user has forgotten their password, they can click the **<Forgot password?>** link which will notify the MYGW-MA server to reset the user password, allocate a temporary password and send it to the user's registered email address. The user will need to enter their merchant abbreviation and username to use this function. If a password is incorrectly entered 5 times in succession, the system will force a password reset using the same process.

- The merchant abbreviation is a unique abbreviation set up for a particular merchant. Super Administrator users (generally operations managers at My Gateway) can either leave this field blank or enter a '\*' (star) value.
- The username will have been allocated at enablement or created by the Administrator for a particular merchant, PSP or acquirer.
- The password must be at least 8 characters long and include one alphanumeric, one upper case, one lower case and one special character.

Selecting the **<Show Password>** check box toggles the password entry field between show and hide password modes.

Clicking **<Login>** or pressing the **<Enter>** key submits the entered merchant abbreviation, user name and password to the MYGW-MA server for authentication.

Clicking **<Cancel>** or pressing the **<Esc>** key clears all the input fields and repositions the cursor in the portal platform field.

#### **Changing Your Password at Initial Login**

During the log in process the user may be prompted to change their password. This could be because they are logging into MYGW-MA for the first time, using a temporary password after a password reset or the password has expired after a predefined time. In this case a *Change Password* popup is displayed, which requires the user to enter and confirm a new password which conforms to the MYGW-MA password requirements.

Selecting the **<Show Password>** check box toggles the password entry fields between show and hide password modes.

Clicking **<Submit>** or pressing the **<Enter>** key submits the entered password to the MYGW-MA server for processing and logs the user into the portal.

To clear the *Change Password* popup and return to the main login window, refresh the page using the browser 'reload page' option.

Users can log out of MYGW-MA at any stage. If users do not log out, they will eventually be logged out after a specified period of no activity.

## 3.4. The MYGW-MA Home Screen

After login the user is presented with the *MYGW-MA Home* screen; user options are provided on the buttons on the left-hand side of the screen and a menu bar at the top of the screen.

The test portal is differentiated from the production portal with the message *Test* in red, next to the logo at the top left of the screen. Industry news or information from the gateway may be displayed on the right side of the screen.

The *Merchant List* is automatically loaded and displayed; this list contains the names, contact information and status of the merchants which the user has access to. Only merchants with a status of Active (coloured in blue) can perform payment related transactions on the My Gateway Switch.

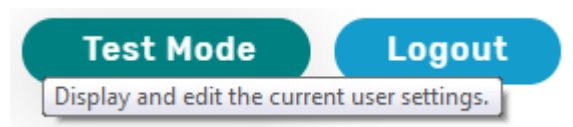
Clicking on the logo at the top left of the screen will return the view to the top of the page.

### Logout

Logout using the <Logout> button on the top right of the screen which will close the *Home* screen, clear any open forms and lists and return the user to the *Login* page.

### Edit User Settings

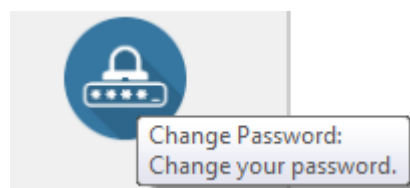
The current user's settings are accessed by selecting the <Username> at the top right of the screen, to the left of the <Logout> button. In the example below the username is 'Test Mode'.



Users can select this option to open the *Edit Current User* form, where they can edit their user settings including their contact details. Fields in grey cannot be edited and are supplied by the MYGW-MA server.

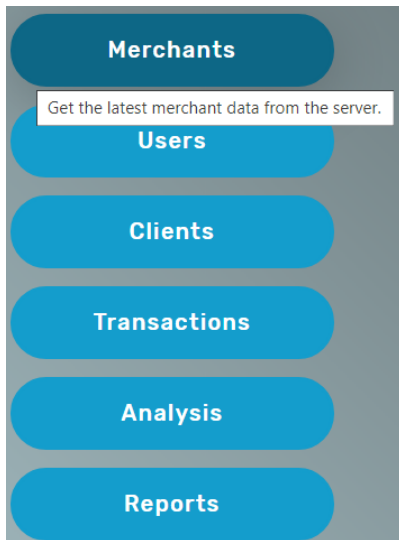
### **Change User Password**

Users can change their password at the *Edit Current User* form by clicking on the <Change Password> icon, at the top right of the screen, shown below.

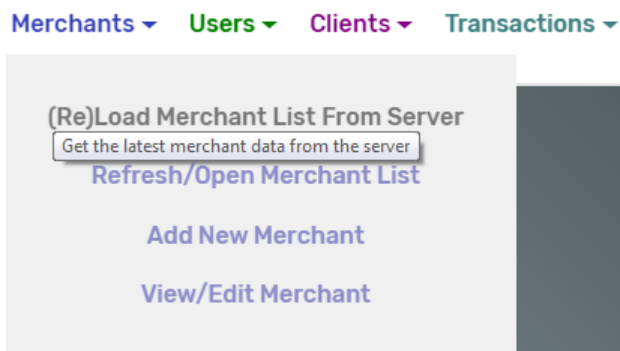


### 3.5. Selecting MYGW-MA Menu Options

The MYGW-MA button options on the Home page, shown below, are used to load various lists - tables of information specific to merchants, users, clients, reports and transactions which the current user has access to; or to open the transaction analysis form.



Users can load the various lists by clicking on the relevant button; the user can also access the same functions using the menu bar at the top of the page. For example, choosing the menu item **<(Re)Load Merchant List From Server>** from the **<Merchants>** menu, shown below, is similar to clicking the **<Merchants>** button shown above.



This applies to all the lists, which can be accessed using the specific button or menu item.

As all the data which is used to populate the lists is stored on the My Gateway server, choosing to load a list will result in the data for the list being loaded from the server. This may take up to a minute depending on traffic to the server, in the meantime a status information text box is displayed which is automatically closed once the relevant list is created.

Users manage the data in the Merchant, User, Client, Report and Transaction Lists through various Forms as described below. Note that there may be multiple lists and forms displayed on the screen at any time, there is no restriction on how many lists and/or forms a user may load simultaneously.

## 4. Managing Merchants

### 4.1. The Merchant List

The Merchant List displays the details of the user's merchants as stored on the server. This list is automatically loaded from the server once the user logs in and once the merchant data has been received, the Merchant List is displayed. Though this list is automatically loaded at login; the user can reload it at any time by choosing the option **<(Re)Load Merchant List From Server>** from the **<Merchants>** menu.

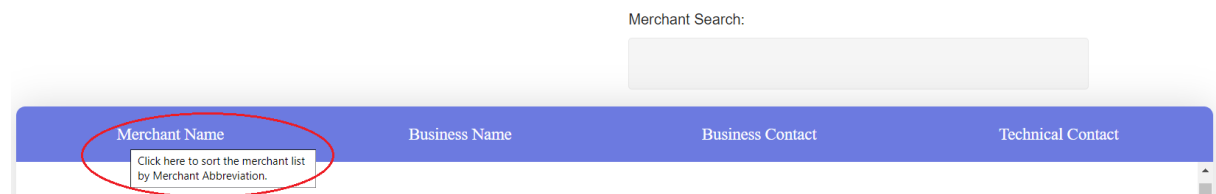
This list includes high level details of all the merchants which the user has access to in the form of a 5-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

#### Searching and Sorting the Merchant List

Users can search the contents of the list using the **<Merchant Search>** box; entering any characters in the search box will change the contents of the Merchant List to only show merchant details which include the entered characters.

The Merchant List can be sorted by any of the columns by clicking on that column's header, for example selecting **<Merchant Name>** from the header will sort the list by merchant name in ascending or descending order (shown circled in red below). The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

The **<Merchant Search>** box and merchant details are as shown below.



The number of merchants which conform to the search criteria is displayed at the bottom left of the Merchant List, as is the total number of merchants in the list.

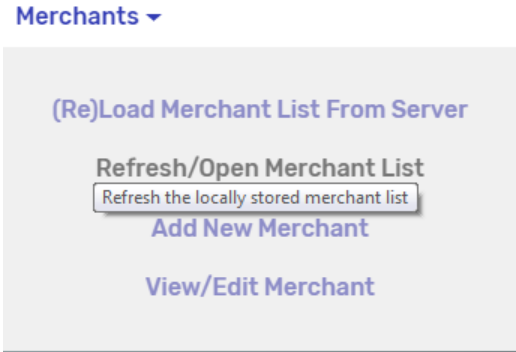
#### Printing or Saving the Merchant List

The Merchant List can be printed or downloaded using the options on the bottom right of the list. Choosing the **<Print Merchant List>** option will result in a popup being displayed and the list can then be printed to any connected printer or downloaded and saved as a PDF file.

Choosing the **<Download Merchant List>** option will result in the merchant list being downloaded to the user’s computer as a Comma Separated Values (CSV) file which can be read using common applications such as Excel and most text editors.

### Closing the Merchant List

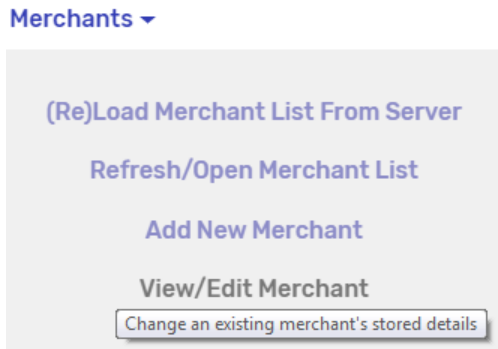
Close the Merchant List by choosing the option at the bottom right of the list, this option closes the Merchant List; but does not delete the merchant data loaded from the server. To reload the Merchant List using the last data downloaded from the server, choose the **<Refresh/Open Merchant List>** option from the **<Merchants>** menu, as shown.



This option does not reload any data from the server; the Merchant List is recreated and populated from the merchant details data stored from the last load.

## 4.2. The View/Edit Merchant Form

Clicking on any of the cells in the Merchant List results in the full information for that merchant being loaded from the server, after which the *View/Edit Merchant Form* is displayed. This form can also be accessed from the <View/Edit Merchant> option on the <Merchants> menu, as shown.

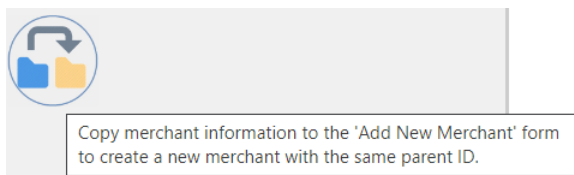


The *View/Edit Merchant Form* provides options to access, review, change, copy and delete a merchant's stored information on the My Gateway server.

All the fields on the form marked with a star '\*' are required fields and before submitting any changes to the server, these fields need to be completed. The <Select Merchant> field allows the user to select a specific merchant to view or edit. Any fields with a grey background cannot be changed and the information in these fields is supplied by the server.

### Copy Merchant Information

The *View/Edit Merchant Form* includes up to 4 icons at the top right, shown below is the *Copy Merchant Information* icon.



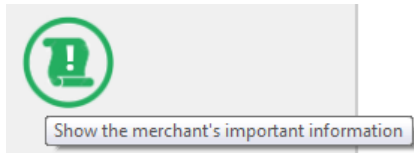
This option is useful should the user find it necessary to create a new merchant with substantially the same details as an existing merchant. For example, a new merchant may be similar to an existing merchant; but require a different presenting or settlement currency.

Clicking on this icon results in most of the merchant details (including brand fee details; but not presenting currencies) being copied to a new *Add New Merchant Form*, from where a new merchant can be created based on the details copied from the existing merchant. The *Add New Merchant Form* is described below.



## Merchant Important Information

The *View/Edit Merchant Form* includes up to 4 icons at the top right, shown below is the *Merchant Important Information* icon.

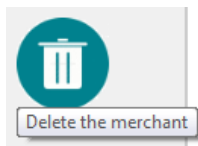


Choosing this option will open an *Information* message with details of the required information a merchant needs to have to be able to process transactions through the My Gateway payment gateway.

This information includes the **Merchant Abbreviation** (required for various API calls and logging into the portal); the **Merchant ID** (used for payment processing), the **Merchant API Key** and **Merchant Key** (used to access the API calls).

## Delete Merchant

The *View/Edit Merchant Form* includes up to 4 icons at the top right, shown below is the *Delete Merchant* icon.

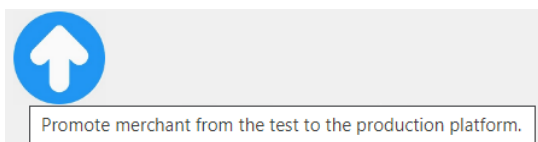


Users with the appropriate access privileges and rights can use this option to delete the current merchant from the server. Note that once a merchant is deleted from the server, the merchant's details are no longer available, and no transactions can be performed using the merchant's details. The merchant's information will no longer be available in the Merchant List and to manage a merchant with the same or similar details will require the user to create a new merchant.

In many cases it may be preferable to use the **<Merchant Status>** field in the *View/Edit Merchant Form* to change the merchant status to *Terminated* or *Suspended*, rather than delete the merchant entirely.

## Promote Merchant

The *View/Edit Merchant Form* includes up to 4 icons at the top right, shown below is the *Promote Merchant* icon.



Users with the appropriate access privileges and rights can use this option to promote the current merchant from the test platform to the production platform. This option is only available on the test platform and when a merchant is promoted, if the merchant is already live on the production platform its details will be overwritten.

To perform live transactions a merchant will require that their information is loaded onto the production platform and this option is the recommended way to achieve that.

### **Closing the View/Edit Merchant Form**

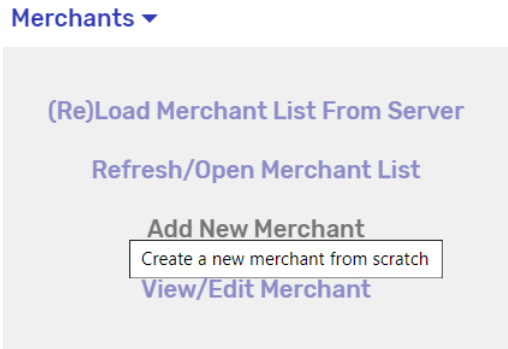
Clicking the <**Cancel**> button or pressing the <**Esc**> key will close the form and delete any changes the user may have made to the merchant details.

Clicking the close form button, <**X**> will close the form while maintaining any changes the user may have made to the merchant information. Changed information will not be submitted to the server for processing; but will be available to the user by loading the *View/Edit Merchant Form* from the <**View/Edit Merchant**> option on the <**Merchants**> menu.

Clicking the <**Save**> button or pressing the <**Enter**> key will result in the form's data being checked for completeness and, if complete, the updated merchant information being sent to the server for processing. The user is informed of the result of the server's attempt to update the merchant details through either a *Warning* message in case of failure, or an *Alert* message in case of a successful update.

## 4.3. The Add New Merchant Form

There are two ways to access the *Add New Merchant Form*, by clicking the *Copy Merchant* icon from the *View/Edit Merchant Form*, as described above; or from the **<Add New Merchant>** option on the **<Merchants>** menu, as shown below. In the case of the former, the newly created merchant will normally have the same settlement, currency, naming and billing parameters as the original; while in the latter case a separate merchant will be created from scratch.

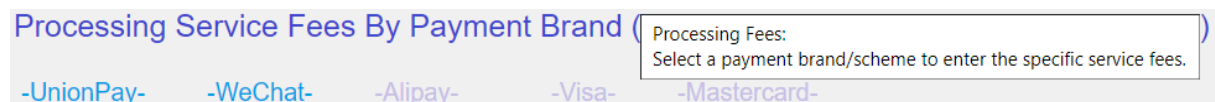


The *Add New Merchant Form* provides the user the capability to create a new merchant or suite of merchants on the My Gateway server. The form is made up of 4 screens, use the **<Back>** and **<Next>** buttons to move between screens.

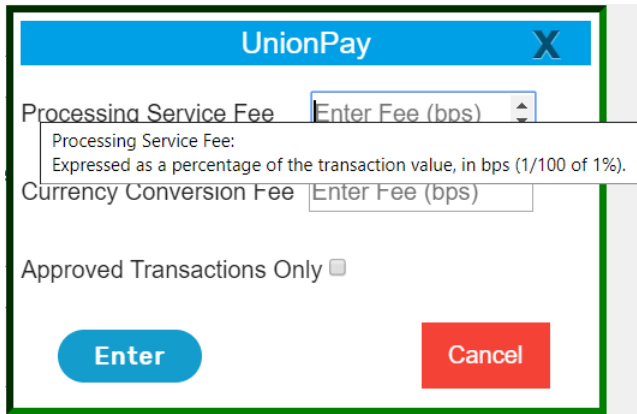
All the fields on the form marked with a star '\*' are required fields and before submitting any request to create the merchant, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information; it is important that the fees, banking, contact and other details are correctly entered as this information is used to calculate fees and settle funds to the merchant.

### Processing Fees

Processing fees, the percentage of each transaction withheld as service charges, can be differentiated by payment brand or scheme. These fees are entered on screen 2 of the form under the heading **<Processing Service Fees By Payment Brand>**, shown below.



The user may select any of the brands/schemes shown in blue and must select at least one payment brand to have processing fees entered. Clicking on a blue payment brand loads the *Payment Brand Processing Fees Popup*, a fixed window displayed in the middle of the screen.



The user can enter the *Merchant Discount Fee (MDF)*, *Currency Conversion Fee* (if applicable) and whether the fees apply to all, or to approved transactions only.

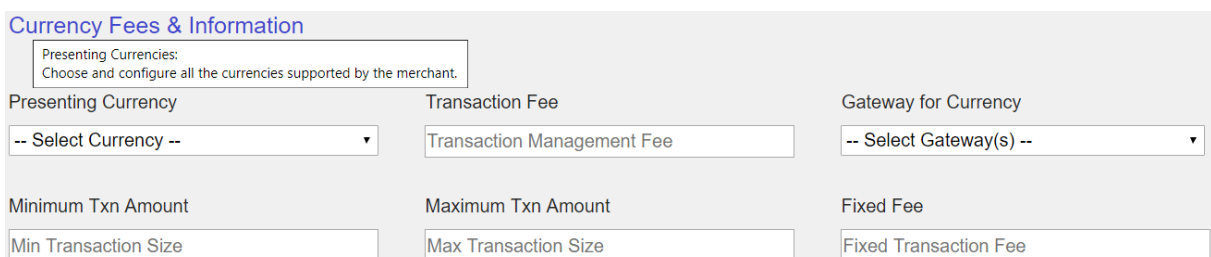
Clicking the **<Cancel>** button or pressing the **<Esc>** key will clear the input fields of any data entered and close the window.

Clicking the close popup button **<X>** will close the window and preserve any user entered information, allowing the user to return and complete the information fields later.

Clicking the **<Enter>** button or pressing the **<Enter>** key will check the information entered for completeness and, if complete, accept the fees entered and close the window.

## **Presenting Currencies**

International, multi-currency supporting merchants may choose to present payment transactions to the My Gateway Switch in a variety of different currencies. The specific information associated with each currency is entered on screen 3 of the form under the heading **<Currency Fees & Information>**, the header and fields required to create a presenting currency are shown below.



Once the user has selected a currency from the **<Presenting Currency>** dropdown menu and configured the currency with the relevant currency information, that currency is added to the list of currencies supported by that merchant. The extract below shows a merchant with three currencies configured - *USD*, *HKD* and *SGD* (circled in red).

Currency Fees & Information  
~~USD- -HKD- -SGD-~~

Presenting Currency	Transaction Fee	Gateway for Currency
SGD	1	Dynamic
Minimum Txn Amount	Maximum Txn Amount	Fixed Fee
100	10000	1

To delete a currency from the Presenting Currencies list, load that currency in the **<Presenting Currency>** dropdown field and clear any of the other fields associated with that currency.

## **Closing and Submitting the Add Merchant Form**

Clicking the **<Cancel>** button or pressing the **<Esc>** key at any of the 4 screens will close the form and delete any information the user may have entered in the *Add New Merchant Form*.

Clicking the close form button, **<X>** at any of the 4 screens will close the form while maintaining any information the user may have entered to create the merchant. Entered information will not be submitted to the server for processing; but will be available to the user by opening the *Add New Merchant Form* from the **<Add New Merchant>** option on the **<Merchants>** menu.

Clicking the **<Submit>** button or pressing the **<Enter>** key on page 4 of the form will result in the form's data being checked for completeness and, if complete, the entered merchant information being sent to the server for merchant creation. The user is informed of the result of the server's attempt to create the merchant through either a *Warning* message in case of failure, or an *Information* message in case of a successful addition similar to either of the screens shown below.

The first screen (1) shows the response when a new merchant is created from scratch; the next screen (2) shows the response when a new merchant is created using the **<Copy Merchant>** option.

Note that more than one merchant may have been created depending on the number of presenting currencies selected during the *Add New Merchant* process.



The merchant **Test Merchant(AUD)** has been created. You have been allocated 1 MID[s], one for each currency selected.

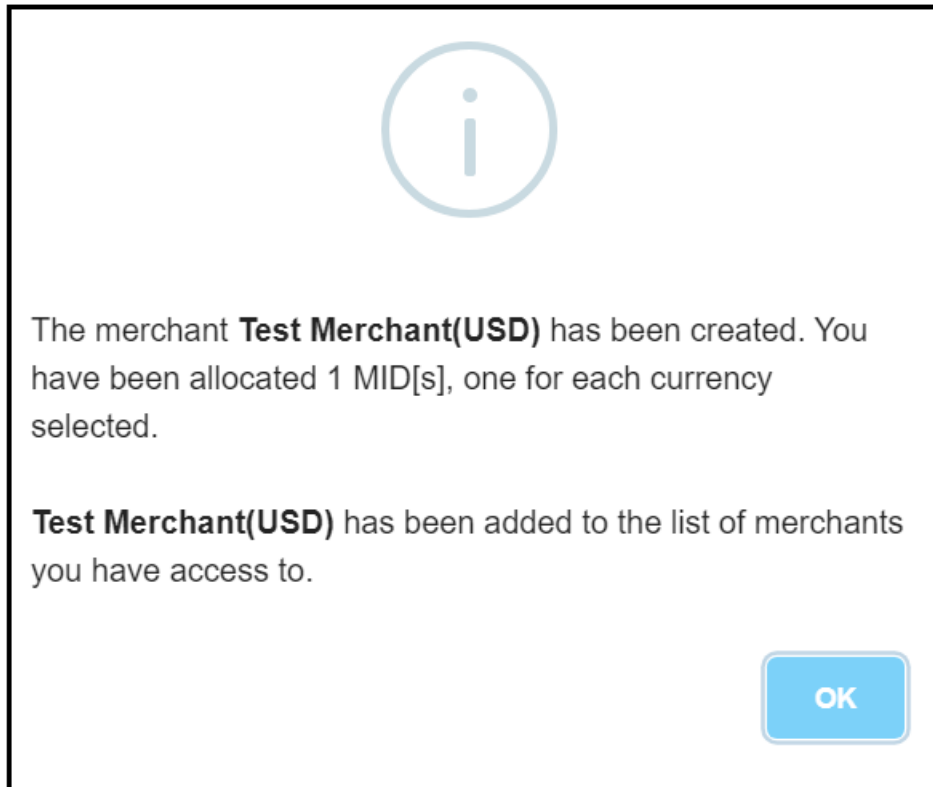
An email has been sent to **test@merchtest.com** with an initial password for the portal at **portal.my-gateway.net**. The user name is: **Admin**, Merchant Abbreviation: **TestMerch(AUD)**. A password change will be forced at first logon. Please be aware that the password email is auto-generated from an email address which is not monitored.

Password policy: 1+ Number, 1+ Special Character, 1+ Uppercase Letter, 1+ Lowercase Letter and minimum 8 characters long.

The Initial password (delivered by email) will expire after 5 business days.

OK

1. *Response when a new merchant is successfully created from scratch*



2. *Response when a new merchant is created using the Copy Merchant option*

If the merchant is successfully created the merchant's details are displayed to the user in the *View/Edit Merchant Form*, and a Merchant Admin user is created at the server (see below for more details on creating users). The required login details for the new user are emailed to the user's email address and a password change will be required at first login for the new merchant.

Though the new merchant has been created and the new merchant profile stored at the server, the user can change or delete this information at the displayed *View/Edit Merchant Form*, if required. If no changes are required and the merchant is not to be deleted, the form can be closed by clicking the close form button, <X>, the <Cancel> button or by pressing the <Esc> key.

### **Merchant Naming Convention**

A merchant is created for each Presenting Currency added and named **MerchantName(CUR)**, with a Merchant Abbreviation of **MerchantAbbr(CUR)**, where CUR is the international ISO currency code for the configured currency and MerchantName and MerchantAbbr are the user entered Merchant Name and Merchant Abbreviation respectively.

Each of the created merchants is allocated their own unique set of *Important Information* (see above under *View/Edit Merchant Form*) used at login, for processing payments at the My Gateway Switch and for accessing and using the My Gateway API.

## 5. Managing Users

### 5.1. User Access Rights and Roles

Users of the My Gateway Portal have different privileges on the portal depending on the rights and the role allocated to them at user creation.

#### **Merchant Users**

A Merchant User is able to login to the portal and view the merchant details using the Merchant Management functions described above. Merchant Users can also perform the majority of Client and Transaction Management functions described below. However, Merchant Users are not permitted to Manage Users (the functions described in this section) or to create new merchants.

Merchant Users will only be presented with those options to which they are permitted access; however, should a Merchant User attempt a function for which they do not have sufficient access rights, a *Warning* message will be displayed.

#### **Admin Users**

Admin Users generally have the capability to perform all the functions available to manage merchants, users, clients and transactions described in this document. However, these functions are limited to managing the users, clients and transactions associated with specific merchants, not all the merchants enabled on the My Gateway server.

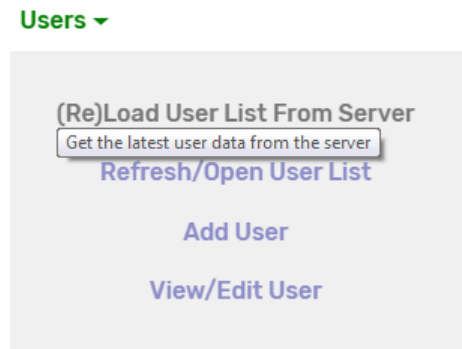
The merchants which an Admin User has rights to manage are those included in the Merchant List described above.

Admin Users will only be presented with those options to which they are permitted access; however, should an Admin User attempt a function for which they do not have sufficient access rights, a *Warning* message will be displayed.



## 5.2. The User List

The User List displays the details of the users allowed access to the merchant data as stored on the server. This list is loaded (and reloaded) from the server either using the <Users> button on the portal home page or by selecting the option <(Re)Load User List From Server> from the <Users> menu as shown below.



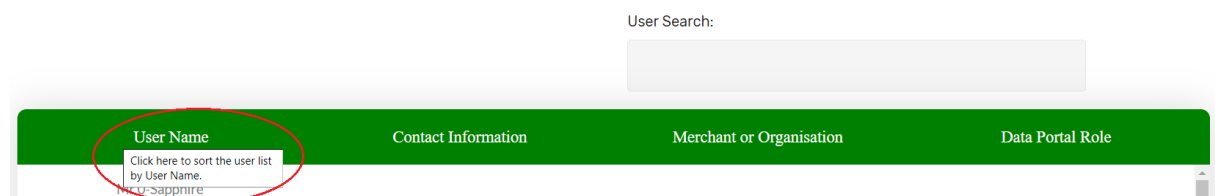
This list includes high level details of all the users with access to the current merchant's data in the form of a 4-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

### Searching and Sorting the User List

Users can search the contents of the list using the <User Search> box; entering any characters in the search box will change the contents of the User List to only show user details which include the entered characters.

The User List can be sorted by any of the columns by clicking on that column's header, for example selecting <User Name> from the header will sort the list by user name in ascending or descending order (shown circled in red below). The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

The <User Search> box and user details are as shown below.



The number of users which conform to the search criteria is displayed at the bottom left of the User List, as is the total number of users in the list.

## Printing or Saving the User List

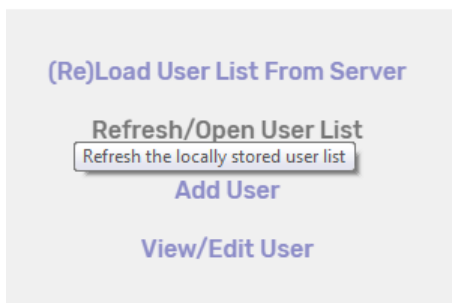
The User List can be printed or downloaded using the options on the bottom right of the list. Choosing the <**Print User List**> option will result in a popup being displayed and the list can then be printed to any connected printer or downloaded and saved as a PDF file.

Choosing the <**Download User List**> option will result in the list being downloaded to the user's computer as a Comma Separated Values (CSV) file which can be read using common applications such as Excel and most text editors.

## Closing the User List

Close the User List by choosing the option at the bottom right of the list, this option closes the User List; but does not delete the user data loaded from the server. To reload the User List using the last data downloaded from the server, choose the <**Refresh/Open User List**> option from the <**Users**> menu, as shown.

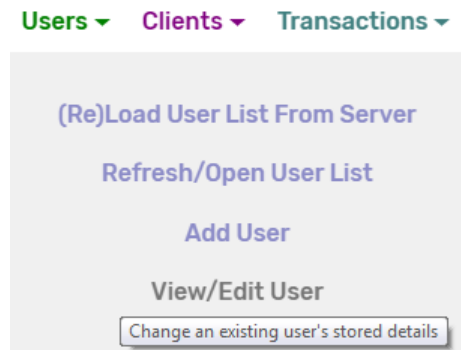
Users ▾



This option does not reload any data from the server; the User List is recreated and populated from the user details data stored from the last load.

## 5.3. The View/Edit User Form

Clicking on any of the cells in the User List results in the full information for that user being displayed in the *View/Edit Users Form*. This form can also be accessed from the <View/Edit User> option on the <Users> menu, as shown.

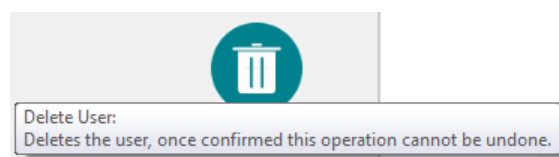


The *View/Edit User Form* provides options to access, review, change and delete a user's stored information on the My Gateway server.

All the fields on the form marked with a star '\*' are required fields and before submitting any changes to the server, these fields need to be completed. The <User Name> field allows the user to select a specific user to view or edit. Any fields with a grey background cannot be changed and the information in these fields is supplied by the server.

### Delete User

The *View/Edit User Form* includes an icon at the top right, the *Delete User* icon, shown below.



Users with the appropriate access privileges and rights can use this option to delete the selected user from the server. Note that once a user is deleted from the server, the user's details are no longer available, and the user will no longer have access to the admin portal. To allow the user to access the portal again a new user will need to be created.

### Closing the View/Edit User Form

Clicking the <Cancel> button or pressing the <Esc> key will close the form and delete any changes the user may have made to the selected user's details.

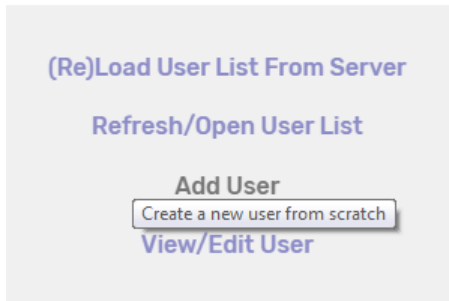
Clicking the close form button, **<X>** will close the form while maintaining any changes the user may have made to the selected user's information. Changed information will not be submitted to the server for processing; but will be available to the user by loading the *View/Edit User Form* from the **<View/Edit User>** option on the **<Users>** menu.

Clicking the **<Save>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the updated user information being sent to the server. The user is informed of the result of the server's attempt to update the user details through either a *Warning* message in case of failure, or an *Alert* message in case of a successful update.

## 5.4. The Add New User Form

New users are added by selecting the <Add User> option on the <Users> menu, as shown.

Users ▾



The *Create User Form* provides the user the capability to add a new user on the My Gateway server. In addition to the user's contact details, name and user ID (used for logging into the portal) the form allows the user to select the new user's *Access Rights & Roles*, described above.

All the fields on the form marked with a star '\*' are required fields and before submitting any request to create the user, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information; it is important that the <User Role> field is correctly completed to avoid providing inappropriate privileges to users.

### **Closing and Submitting the Add User Form**

Clicking the <Cancel> button or pressing the <Esc> key will close the form and delete any information the user may have entered to the *Create User Form*.

Clicking the close form button, <X> will close the form while retaining any information which may have been entered to create the user. Entered information will not be submitted to the server for processing; but will be available to the user by selecting the *Create User Form* option from the <Add User> option on the <Users> menu.

Clicking the <Save> button or pressing the <Enter> key will result in the form's data being checked for completeness and, if complete, the entered new user information being sent to the server for processing. The user is informed of the result of the server's attempt to create the user through either a *Warning* message in case of failure, or an *Information* message in case of a successful update similar to the one shown below.



## Create User - JTest

Hello,

An email has been sent to **jtest@sstest\_3.com** with an initial password for the portal at **portal.my-gateway.net**. The user name is: **JamesTest**, Merchant Abbreviation: **sstest3(EUR)**. A password change will be forced at first logon. Please be aware that the password email is auto-generated from an email address which is not monitored.

Password policy: 1+ Number, 1+ Special Character, 1+ Uppercase Letter, 1+ Lowercase Letter and minimum 8 characters long.

The Initial password (delivered by email) will expire after 5 business days.

OK

If the user is successfully created the new user's details are displayed to the user in the *New User's Details Form*. The required login details for the new user are emailed to the user's email address and a password change will be required at first login.

Though the new user has been created and the new user profile stored at the server, the user details can be changed or deleted from the *New User's Details Form* if required. If no changes are required and the user is not to be deleted, the form can be closed by clicking the close form button, **<X>**, the **<Cancel>** button or by pressing the **<Esc>** key.

## **6. Managing Clients**

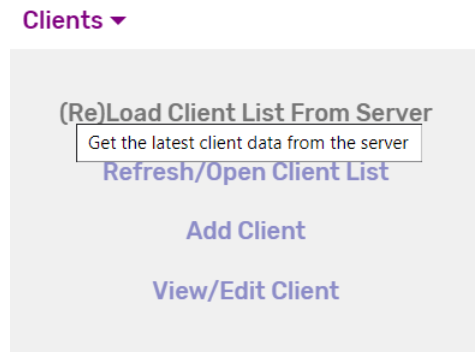
### **6.1. The Client Account Management System**

The MYGW Client Account Management System is designed for merchants and processors who need to manage an on-going relationship with their clients. While merchants and processors may provide a client account management system hosted on their own servers; this system provides this service, freeing merchants and processors from the need to manage sensitive client data.

Merchants and processors are provided with a database hosted on the MYGW platform. Client information is stored on the MYGW database and accessed via the portal.

## 6.2. The Client List

The Client List displays the details of the clients loaded in the client database management system stored on the server for the current merchant. This list is loaded (and reloaded) from the server either using the <Clients> button on the portal home page or by selecting the option <(Re)Load Client List From Server> from the <Clients> menu as shown below.



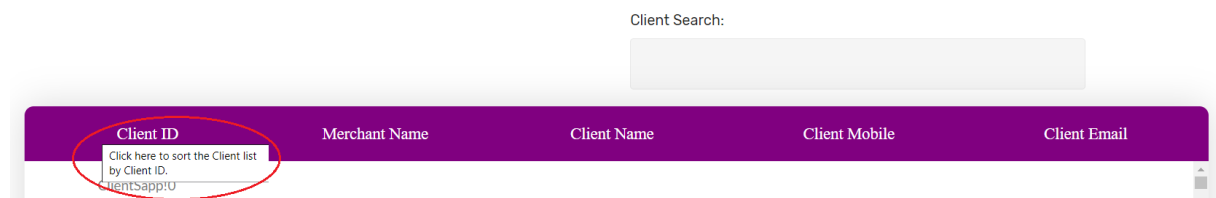
This list includes high level details of all the merchant's clients in the form of a 5-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

### Searching and Sorting the Client List

Users can search the contents of the list using the <Client Search> box; entering any characters in the search box will change the contents of the Client List to only show client details which include the entered characters.

The Client List can be sorted by any of the columns by clicking on that column's header, for example selecting <Client ID> from the header will sort the list by client ID in ascending or descending order (shown circled in red below). The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

The <Client Search> box and client details are as shown below.



The number of clients which conform to the search criteria is displayed at the bottom left of the Client List, as is the total number of clients in the list.



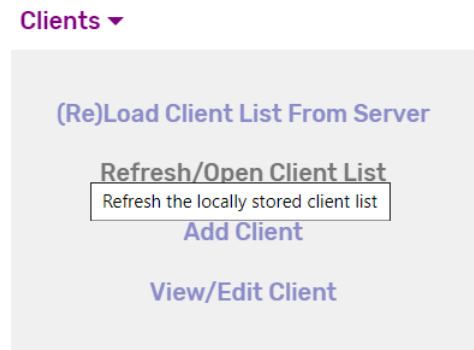
## Printing or Saving the Client List

The Client List can be printed or downloaded using the options on the bottom right of the list. Choosing the <**Print Client List**> option will result in a popup being displayed and the list can then be printed to any connected printer or downloaded and saved as a PDF file.

Choosing the <**Download Client List**> option will result in the list being downloaded to the user's computer as a Comma Separated Values (CSV) file which can be read using common applications such as Excel and most text editors.

## Closing the Client List

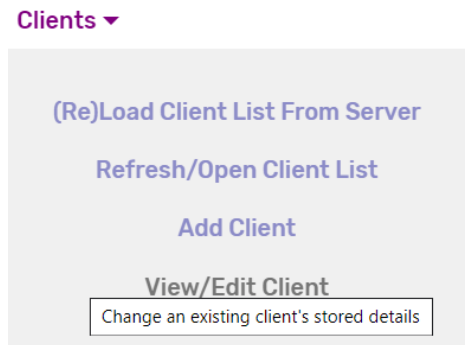
Close the Client List by choosing the option at the bottom right of the list, this option closes the Client List; but does not delete the client data loaded from the server. To reload the Client List using the last data downloaded from the server, choose the <**Refresh/Open Client List**> option from the <**Clients**> menu, as shown.



This option does not reload any data from the server; the Client List is recreated and populated from the client details data stored from the last load.

## 6.3. The View/Edit Client Form

Clicking on any of the cells in the Client List results in the full information for that client being displayed in the *View/Edit Client Form*. This form can also be accessed from the <View/Edit Client> option on the <Clients> menu, as shown.

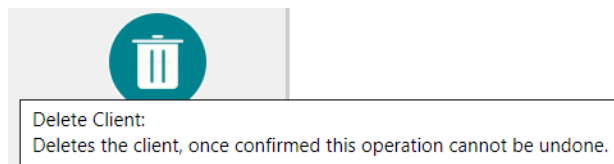


The *View/Edit Client Form* provides options to access, review, change and delete a client's stored information on the My Gateway server.

All the fields on the form marked with a star '\*' are required fields and before submitting any changes to the server, these fields need to be completed. The <Client ID> field allows the user to select a specific client to view or edit. Any fields with a grey background cannot be changed and the information in these fields is supplied by the server.

### Delete Client

The *View/Edit Client Form* includes an icon at the top right, the *Delete Client* icon, shown below.

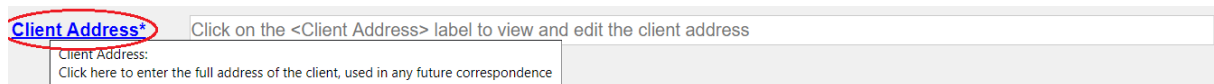


Users with the appropriate access privileges and rights can use this option to delete the selected client from the server. Note that once a client is deleted from the server, the client's details are no longer available, and the client's details will no longer be displayed on the admin portal.

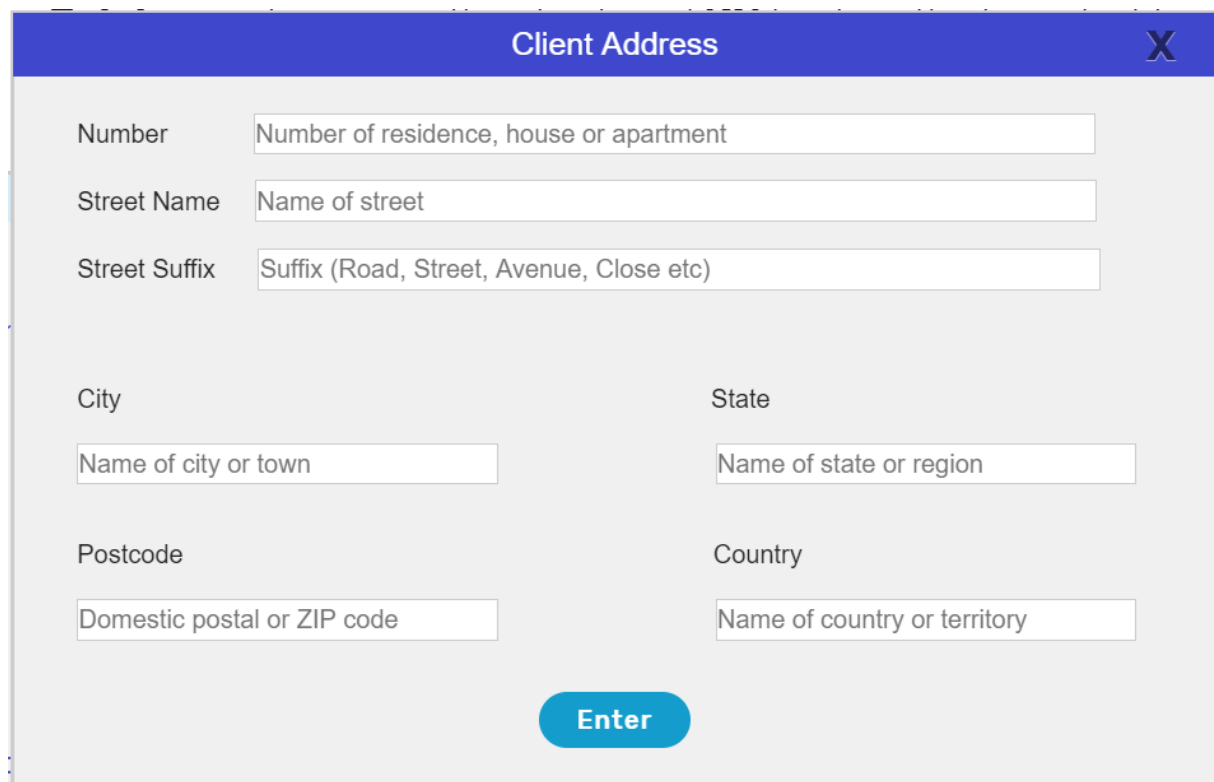
In some cases, it may be preferable to use the <Blacklist> checkbox in the *View/Edit Client Form* to change the client status to *Blacklisted*, rather than deleting the client entirely. Blacklisting a client results in that client being unable to perform payment related transactions at their merchant until this restriction is removed; however, the client's details are still stored on the server.

## Client Address Entry

The Client Address is entered as a series of separate fields broken down into the address' component parts (e.g. Street Number, Street Name, State etc). These address fields are entered by clicking the *Client Address* label, shown below.



Clicking on the *Client Address* label loads the *Client Address Form*, a fixed window displayed in the middle of the screen.



The user can enter the client address fields which are relevant to the client, note that the client address is not mandatory client data.

Clicking the close popup button **<X>** will close the window and preserve any user entered information, allowing the user to return and complete the address fields later.

Clicking the **<Enter>** button or pressing the **<Enter>** key will accept the address entered and close the window.

## **Closing the View/Edit Client Form**

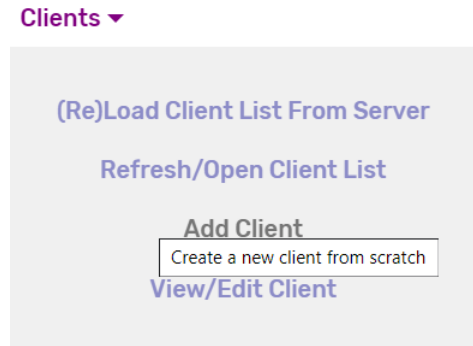
Clicking the <**Cancel**> button or pressing the <**Esc**> key will close the form and delete any changes the user may have made to the selected client's details.

Clicking the close form button, <**X**> will close the form while maintaining any changes the user may have made to the selected client's information. Changed information will not be submitted to the server for processing; but will be available to the user by loading the *View/Edit Client Form* from the <**View/Edit Client**> option on the <**Clients**> menu.

Clicking the <**Save**> button or pressing the <**Enter**> key will result in the form's data being checked for completeness and, if complete, the updated client information being sent to the server. The user is informed of the result of the server's attempt to update the client details through either a *Warning* message in case of failure, or an *Alert* message in case of a successful update.

## 6.4. The Add New Client Form

New clients are added by selecting the <Add Client> option on the <Clients> menu, as shown.



The *Create Client Form* provides the user the capability to add a new client to the My Gateway server. In addition to the client's contact details, name and user ID, the form allows users to enter the details of up to 3 payment cards, used to expedite payment processing.

The client address is entered using the same process as described above for the *View/Edit Client Form*.

All the fields on the form marked with a star '\*' are required fields and before submitting any request to create the client, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information; note that the Client Address field cannot be directly edited as this information is entered in the *Client Address* popup form.

### **Closing and Submitting the Add Client Form**

Clicking the <Cancel> button or pressing the <Esc> key will close the form and delete any information the user may have entered in the *Create Client Form*.

Clicking the close form button, <X> will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by opening the *Create Clients Form* option from the <Add Client> option on the <Clients> menu.

Clicking the <Save> button or pressing the <Enter> key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server for processing. The user is informed of the result of the server's attempt to create the client through either a *Warning* message in case of failure, or an *Information* message in case of a successful update similar to the one shown below.



## Client Created - TestClient

Hello,

A new Client has been created and allocated Gateway ID :

**754f3e94-b1ff-4a3d-bfc7-8109d121966b**

Merchant Name: **SSTest\_3(EUR)**

Merchant ID: **a780e849-bbca-455a-b9f5-d636edf8f6e6**

Client Name : **TestClient**

Client ID : **TClient**

Client Mobile : **0000-1111**

Client Email : **tclient@sstest\_3.com**

Contact **support@my-gateway.net** if you have any questions.

OK

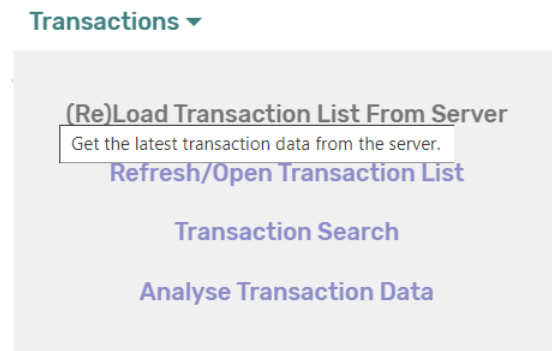
If the client is successfully created the new client's details are displayed to the user in the *New Client's Details Form*. The Gateway ID is a unique token which My Gateway Switch uses to identify the client in its systems.

Though the new client has been created and the new client profile stored at the server, the client details can be changed or deleted from the *New Client's Details Form* if required. If no changes are required and the client is not to be deleted, the form can be closed by clicking the close form button, **<X>**, the **<Cancel>** button or by pressing the **<Esc>** key.

# 7. Managing Transactions

## 7.1. The Transaction List

The Transaction List displays an overview of the transactions performed by the merchants loaded over the latest transaction cycle, generally between 5 and 10 days. This list is loaded (and reloaded) from the server either using the <Transactions> button on the portal home page or by selecting the option <(Re)Load Transaction List From Server> from the <Transactions> menu as shown below.



This list includes high level details of all the merchant’s transactions in the form of a 9-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

### Sorting and Searching the Transaction List

Users can search the contents of the list using the <Order # Search> box; entering any characters in the search box will change the contents of the Transaction List to only show transaction details which include the entered characters in the <Order #> field.

The Transaction List can be sorted by any of the columns by clicking on that column’s header, for example selecting <Merchant> from the header will sort the list by merchant name in ascending or descending order (shown circled in red below). The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

The list can be searched depending on the user’s requirements as described below under *Search Transaction List*.

The Transaction List header and columns are as shown below.

Merchant	Action	Date & Time	Type	Order #	Client ID	Amount	Result	Response
Sapphire Curacao N.V.(HKD)	Payment	2019-05-20 - 02:	WechatPay	000000	Client 0	CNY6000	11	Duplicate order number

The number of transactions which conform to the search criteria is displayed at the bottom left of the Transaction List, as is the total number of transactions in the list.

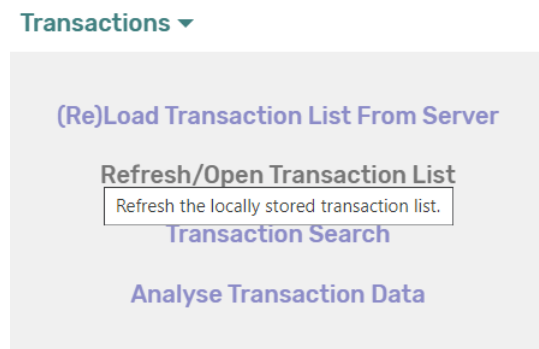
## **Printing or Saving the Transaction List**

The Transaction List can be printed or downloaded using the options on the bottom right of the list. Choosing the **<Print Transaction List>** option will result in a popup being displayed and the list can then be printed to any connected printer or downloaded and saved as a PDF file.

Choosing the **<Download Transaction List>** option will result in the list being downloaded to the user's computer as a Comma Separated Values (CSV) file which can be read using common applications such as Excel and most text editors.

## **Closing the Transaction List**

Close the Transaction List by choosing the option at the bottom right of the list, this option closes the Transaction List; but does not delete the transaction data loaded from the server. To reload the Transaction List using the last data downloaded from the server, choose the **<Refresh/Open Transaction List>** option from the **< Transactions>** menu, as shown.



This option does not reload any data from the server; the Transaction List is recreated and populated from the transaction details data stored from the last load.

## **Displaying Transaction Totals**

Transaction totals for the currently displayed Transaction List, i.e. those transactions currently displayed in the list, can be requested using the **<Transaction Currencies>** menu at the bottom left of the list. This dropdown menu contains a list of currencies representing the currencies which are present in the current Transaction List. Choosing a currency from this menu displays the number of transactions and the total value of transactions performed in that currency, as shown below.

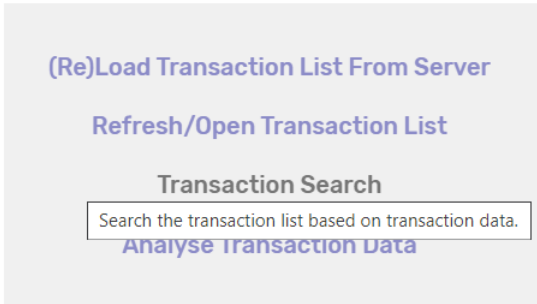




## 7.2. The Transaction Search Parameters Form

Clicking on any of the cells in the Transaction List, except for cells in the Order # column, results in the *Transaction Search Parameters Form* being displayed. This form can also be accessed from the <**Transaction Search**> option on the <**Transactions**> menu, as shown.

Transactions ▾



The *Transaction Search Parameters Form* provides options to search the current Transaction List and create a 'customised Transaction List' based on the search parameters selected by the user.

The search criteria or parameters which a user can select to refine or customise the Transaction List are

- **Merchants** – a dropdown list; if a merchant name is selected from the list of available merchants in the dropdown list, only that merchant's transactions will be displayed in the customised Transaction List
- **Client ID** - if a client ID is entered in this field only that client's transactions will be displayed in the customised Transaction List
- **Response** – a dropdown list; if a specific transaction response is chosen from the list, only transactions with this response will be displayed in the customised Transaction List
- **Currency** – a dropdown list; if a specific currency is chosen from the list of available currencies, only transactions with that currency will be displayed in the customised Transaction List
- **Start Date** and **End Date** – date fields; if specific dates are entered in these fields only transactions performed between those dates will be displayed in the customised Transaction List
- **Transaction Type** – a dropdown list; if a specific transaction type is chosen from the list, only transactions of that type will be displayed in the customised Transaction List
- **Payment Type** - a dropdown list; if a specific payment type (payment brand) is chosen from the list, only transactions of that payment brand will be displayed in the customised Transaction List

- **Amount Low** and **Amount High** – amount fields; if specific amounts are entered in these fields only transactions with values between these amounts will be displayed in the customised Transaction List

## Populating the Transaction Search Form

Once the *Transaction Search Parameters Form* has been loaded, it can be populated either by entering the required data into the fields manually or by selecting (clicking on) cells in the Transaction List. The latter is the more efficient way in which to populate the fields in this form and is shown below.

The screenshot shows a 'Transaction Search Parameters' form overlaid on a table of transactions. The form fields are populated as follows:

- Merchant Name:** Test Merchant (selected from the list)
- Client ID:** CU6611 (selected from the list)
- Transaction Type:** Payment (selected from the list)
- Amount Low:** 0.00
- Amount High:** 0.00

The background table shows a transaction for 'Test Merchant' with a 'Client ID' of 'CU6611' and a 'Type' of 'Payment'. The form also includes a 'Search' button and a 'Refresh Transaction List' link.

In the example above, with the form open the user has clicked on a merchant ('Test Merchant' in this case) in the Transaction List which results in the **<Merchant Name>** field in the form being auto-populated with the merchant name selected. Similarly, the **<Client ID>** and **<Transaction Type>** fields have been auto-populated by selecting the relevant cells in the list. This form is 'draggable' by the header bar and so can be moved to allow access to the Transaction List cells if required.

Note that not all fields need to be completed to perform a transaction search.

At the bottom right of this form, **<Refresh Txn List>** is used clear all the form fields and reload the Transaction List using the last data downloaded from the server without closing the form.

## **Closing the Transaction Search form**

Clicking the close form button, <X> will close the form while maintaining the data entered in the search fields by. No searches will be performed on the Transaction List and any data entered will be available to the user when the form is reloaded.

Clicking the <Search> button or pressing the <Enter> key will result in the form being closed and a search being performed on the Transaction List using the user's desired parameters and a customised Transaction List being displayed. Clearing a field before the search will remove that parameter from the search.

Subsequent requests to print or save the list, or for transaction currency totals will be performed on the customised Transaction List rather than the original list loaded from the server.

Choosing the <Refresh/Open Transaction List> option from the <Transactions> menu will clear the customised list and reload the Transaction List with last received transaction data from the server.

## 7.3. The Transaction Details Form

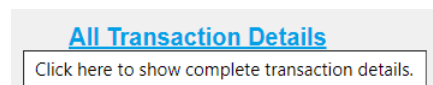
Clicking on any of the cells in the <Order #> column of the Transaction List results in the *Transaction Details Form* being displayed. This is the only way to access this form.

The *Transaction Form* is an information form which provides more detailed information on the transaction selected. While the form has a number of labels and fields, the user is not required to enter any data at this form; all the fields provide additional transaction information and are 'read only' and cannot be changed.

While the form is open (loaded) clicking on any cell in the <Order #> column of the Transaction List results in the transaction details for that order being loaded from the server and displayed in the form, overwriting any data in the information fields. The *Transaction Details Form* is 'draggable' by the header bar and so can be moved to allow access to the Transaction List <Order #> cells if required.

### The Transaction Details List Window

The My Gateway server maintains a rich set of data for each transaction which may be useful for users or merchant operations staff to more thoroughly analyse particular transactions. Clicking on the <All Transaction Details> option field, shown below, or pressing the <Enter> key in the *Transaction Details Form* provides the user with that information.



Selecting this option results in a new window, the *Transaction Details List Window*, being opened. This window consists of the transaction details list, a 2-column table which contains more information on the selected transaction stored on the server. The information in this window is in the following sections

- **Transaction Details** – all the information relevant to the transaction including amount, currency, response etc
- **Merchant Details** – all the information stored at the server relevant to the merchant at which this transaction was attempted
- **Client Details** – the data stored at the server relevant to the user who performed the transaction
- **Financial Details** – information related to the fees, charges and settlement arrangements for the transaction
- **Gateway Details** – information regarding any third-party gateways who may have been involved in processing the transaction
- **Other Details** – any other relevant information related to the transaction.

Navigate to the top of this window by clicking on the logo at the top left of the page.

The *Transaction Details List* can be printed or downloaded and saved as a PDF file using the **<Print/Save Transaction Details>** option at the top right of the window.

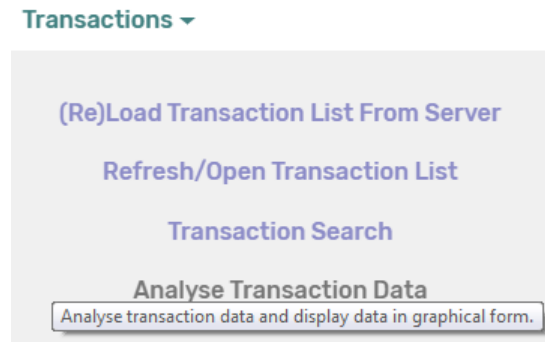
The *Transaction Details List Window* can be closed by choosing the **<Close Transaction Details List>** option or by closing the browser tab or window in the usual way. When closed the user is returned to the main portal screen and the *Transaction Details Form*.

## **Closing the Transaction Details Form**

Clicking the close form button, **<X>**, selecting the **<Close>** button or pressing the **<Esc>** key will close the form and clear the data displayed in the information fields. The form can only be (re)loaded by selecting an **<Order #>** cell from the Transaction List.

## 7.4. The Transaction Data Analysis Form

Clicking on the <Analysis> button at the top of the screen results in the *Transaction Data Analysis Form* being displayed. This form can also be accessed from the <Analyse Transaction Data> option on the <Transactions> menu, as shown.



The *Transaction Data Analysis Form* provides options to analyse and compare merchant transactions.

### The Transaction Data Analysis Form Options

This form includes the ability to display the transaction data in graphical form – the type of graph or chart is chosen using the dropdown menu, <Chart Type> which provides a range of different line, bar and pie charts.

The data to analyse is chosen using the dropdown, <Data> and allows the user the option to choose a variety of parameters, for example to analyse the transaction data by date, volume, response etc.

The <Measure By> dropdown indicates whether the transaction data should be analysed by number of transactions or volume.

Selecting the <Submit> button results in a new window being opened, in which the relevant chart is displayed representing the data and measure chosen. The transaction data is also displayed in a table at the bottom left of the window.

The data displayed can be printed or downloaded and saved as a PDF file using the <Print/Save Transaction Analysis> and can be closed by choosing the <Close Transaction Analysis > option or by closing the browser window in the usual way. When closed the user is returned to the main portal screen and the *Transaction Data Analysis Form*.

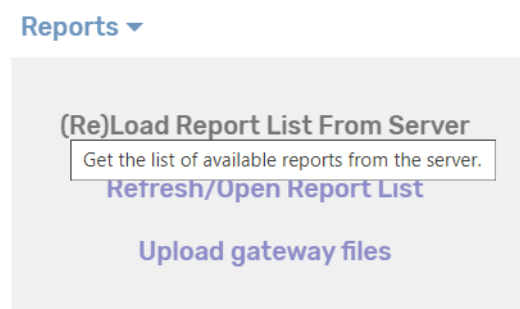
### Closing the Transaction Data Analysis Form

Clicking the close form button, <X> or pressing the <Esc> key will close the form; the selections in the dropdown menus will not be cleared and will be available to the user when the form is next loaded.

# 8. Managing Reports

## 8.1. The Report List

The Report List displays the details of the reports stored in the My Gateway server database for the current merchant(s). This list is loaded (and reloaded) from the server either using the <Reports> button on the portal home page or by selecting the option <(Re)Load Report List From Server> from the <Reports> menu as shown below.



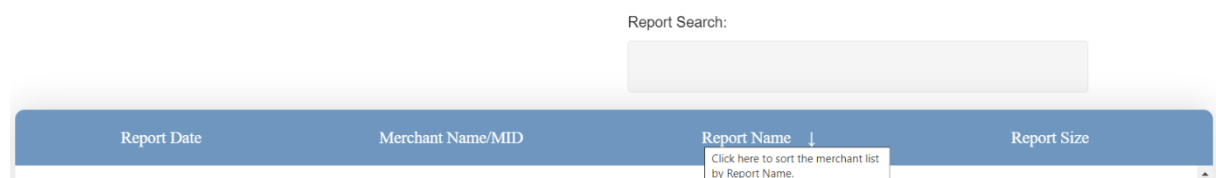
This list includes high level details of all the merchant’s reports in the form of a 4-column table. The list can be mouse scrolled within the table or by using the scroll bar on the right of the table.

### Searching and Sorting the Report List

Users can search the contents of the Report List using the <Report Search> box; entering any characters in the search box will change the contents of the Report List to only show report details which include the entered characters.

The Report List can be sorted by any of the columns by clicking on that column’s header, for example selecting <Report Name> from the header will sort the list by report name in ascending or descending order (shown circled in red below). The sort direction is shown by an arrow to the right of the relevant column header and can be reversed by clicking on that header.

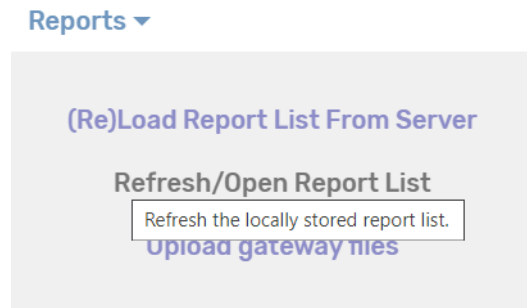
The <Report Search> box and report details are as shown below.



The number of reports which conform to the search criteria is displayed at the bottom left of the Report List, as is the total number of reports in the list.

## **Closing the Report List**

Close the Report List by choosing the option at the bottom right of the list, this option closes the Report List; but does not delete the data loaded from the server. To reload the Report List using the last data downloaded from the server, choose the **<Refresh/Open Report List>** option from the **<Reports>** menu, as shown.



This option does not reload any data from the server; the Report List is recreated and populated from the data stored from the last load.



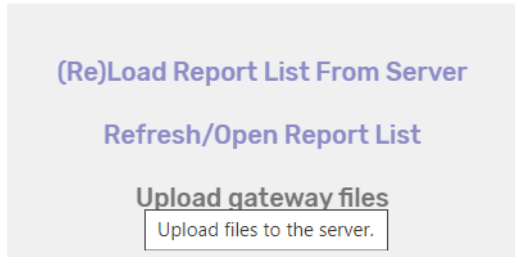
## **8.2. Downloading Reports**

Clicking on any of the cells in the Report List results in the relevant report being downloaded to the user's computer. This is the only way reports can be downloaded from the portal and reports are downloaded one at a time.

## 8.3. Uploading Files

Reports and other files can be uploaded to the server using the <Upload Gateway Files> option from the <Reports> menu, as shown.

Reports ▾



Choosing this option results in standard *Choose File* dialog box being displayed. The user can choose any number of files from this box, after which a Confirm Box is presented requesting the user confirm the files to be uploaded to the server.

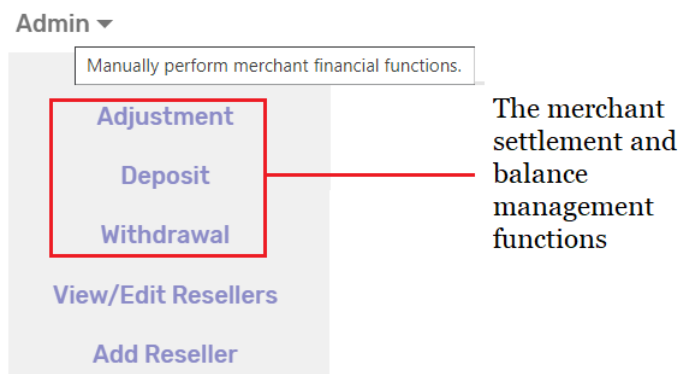
Depending on the size and number of files to be uploaded, the upload may take some time to complete. The user is informed of the result of the server's attempt to store the uploaded files through either a *Warning* message in case of failure, or an *Information* message in case of a successful upload.

## 9. Administration Functions

Users with the appropriate level of access rights can use the portal admin functions from the <Admin> menu option. These options provide merchant settlement and balance management functions; as well as the ability to manage resellers.

### 9.1. Settlement and Balance Management

The portal offers 3 functions to manage the merchant balance stored at the gateway server which can be accessed from the <Admin> menu, as shown below.



### Adjustment

Clicking on the <Adjustment> option results in the *Adjust Merchant Totals Form* being loaded. This function allows the user to adjust a merchant balance if required.

All the fields on the form marked with a star '\*' are required fields and before submitting any request to action the adjustment, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information; note that in order to reduce a merchant's balance enter the amount preceded by a minus sign ('-').

### Closing and Submitting the Adjust Merchant Totals Form

Clicking the <Cancel> button or pressing the <Esc> key will close the form and delete any information the user may have entered to the *Adjust Merchant Totals Form*.

Clicking the close form button, <X> will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by reopening the *Adjust Merchant Totals Form*.

Clicking the <Submit> button or pressing the <Enter> key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server for processing. The user is informed of the result of the server's attempt to action the merchant adjustment through either a *Warning* message in case of failure, or an *Information* message in case of a successful adjustment.

## **Deposit**

Clicking on the <**Deposit**> option results in the *Process Merchant Deposit Form* being loaded. This function allows the user to add funds to a merchant balance if required.

All the fields on the form marked with a star '\*' are required fields and before submitting any request to action the deposit, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information.

### **Closing and Submitting the Process Merchant Deposit Form**

Clicking the <**Cancel**> button or pressing the <**Esc**> key will close the form and delete any information the user may have entered to the *Process Merchant Deposit Form*.

Clicking the close form button, <**X**> will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by reopening the *Process Merchant Deposit Form*.

Clicking the <**Submit**> button or pressing the <**Enter**> key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server for processing. The user is informed of the result of the server's attempt to action the merchant deposit through either a *Warning* message in case of failure, or an *Information* message in case of a successful withdrawal.

## **Withdrawal**

Clicking on the <**Withdrawal**> option results in the *Process Merchant Withdrawal Form* being loaded. This function allows the user to reduce a merchant balance if required.

All the fields on the form marked with a star '\*' are required fields and before submitting any request to action the withdrawal, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information.

### **Closing and Submitting the Process Merchant Withdrawal Form**

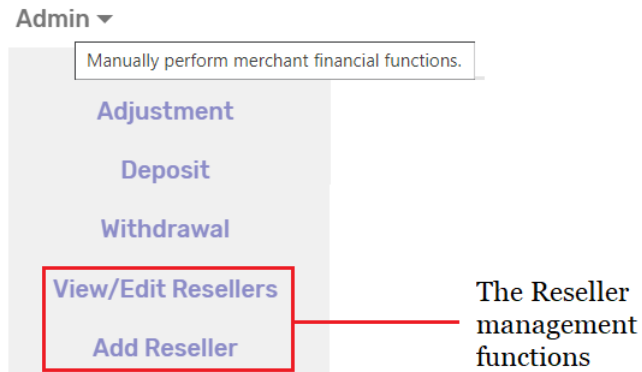
Clicking the <**Cancel**> button or pressing the <**Esc**> key will close the form and delete any information the user may have entered to the *Process Merchant Withdrawal Form*.

Clicking the close form button, <**X**> will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by reopening the *Process Merchant Withdrawal Form*.

Clicking the <**Submit**> button or pressing the <**Enter**> key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server for processing. The user is informed of the result of the server's attempt to action the merchant withdrawal through either a *Warning* message in case of failure, or an *Information* message in case of a successful withdrawal.

## 9.2. Managing Resellers

Merchants, third party processors and acquirers may employ Resellers, and the portal provides the ability to manage resellers through the <Admin> menu, as shown.



### View/Edit Reseller Details

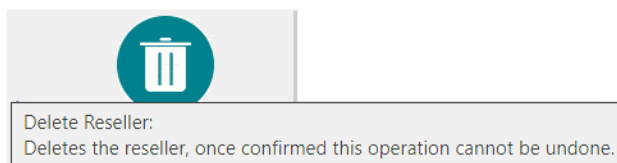
The *View/Edit Resellers Form* is accessed from the <View/Edit Resellers> option on the <Admin> menu, as shown above.

The *View/Edit Resellers Form* provides options to access, review, change and delete a reseller's stored information on the My Gateway server.

All the fields on the form marked with a star '\*' are required fields and before submitting any changes to the server, these fields need to be completed. The <Reseller Name> field allows the user to select a specific reseller to view or edit. Any fields with a grey background cannot be changed and the information in these fields is supplied by the server.

### Delete Reseller

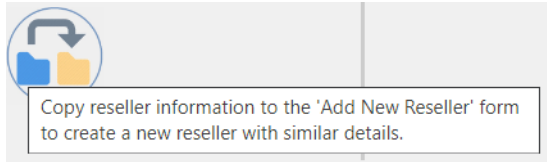
The *View/Edit Resellers Form* includes an icon at the top right, the *Delete Reseller* icon, shown below.



Users with the appropriate access privileges and rights can use this option to delete the selected reseller from the server. Note that once a reseller is deleted from the server, the reseller's details are no longer available.

## Copy Reseller Information

The *View/Edit Reseller Form* includes a *Copy Reseller Information* icon at the top right of the form, shown below.



This option is useful should the user find it necessary to create a new reseller with substantially the same details as an existing reseller.

Clicking on this icon results in reseller details being copied to a new *Add New Reseller Form*, from where a new reseller can be created based on the details copied from the existing reseller. The *Add New Reseller Form* is described below.

## Closing the View/Edit Reseller Form

Clicking the **<Cancel>** button or pressing the **<Esc>** key will close the form and delete any changes the user may have made to the selected reseller's details.

Clicking the close form button, **<X>** will close the form while maintaining any changes the user may have made to the selected reseller's information. Changed information will not be submitted to the server for processing; but will be available to the user by loading the *View/Edit Reseller Form* from the **<View/Edit Reseller>** option on the **<Admin>** menu.

Clicking the **<Save>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the updated reseller information being sent to the server. The user is informed of the result of the server's attempt to update the reseller details through either a *Warning* message in case of failure, or an *Alert* message in case of a successful update.

## The Create Reseller Form

New resellers are added by selecting the **<Add Reseller>** option on the **<Admin>** menu, as shown above.

The *Create Reseller Form* provides the user the capability to add a new reseller to the My Gateway server. In addition to the reseller's contact details, the form allows users to enter commercial information for the reseller.

All the fields on the form marked with a star '\*' are required fields and before submitting any request to create the reseller, these fields need to be completed. Most of the fields on the form are self-explanatory and all include context sensitive help information.

## Closing and Submitting the Create Reseller Form

Clicking the **<Cancel>** button or pressing the **<Esc>** key will close the form and delete any information the user may have entered to the *Create Reseller Form*.

Clicking the close form button, **<X>** will close the form while retaining any information which may have been entered by the user. Entered information will not be submitted to the server for processing; but will be available to the user by opening the *Create Reseller Form* option from the **<Add Reseller>** option on the **<Admin>** menu.

Clicking the **<Save>** button or pressing the **<Enter>** key will result in the form's data being checked for completeness and, if complete, the user entered information being sent to the server for processing. The user is informed of the result of the server's attempt to create the reseller through either a *Warning* message in case of failure, or an *Information* message in case of a successful update.

Though the new reseller has been created and the new reseller profile stored at the server, the reseller details can be changed or deleted from the *New Reseller's Details Form* if required. If no changes are required and the reseller is not to be deleted, the form can be closed by clicking the close form button, **<X>**, the **<Cancel>** button or by pressing the **<Esc>** key.

## 10. Documentation

The My Gateway Portal provides access to the documentation required for a merchant, acquirer, processor or reseller to get started with the platform. This information is available from the <Documentation> menu, choosing an option from this menu results in the relevant document being loaded into a new browser tab or window from where it can be downloaded and saved in PDF format.

The documentation currently available includes

- **My Gateway Onboarding Guide** - serves as a ‘getting started’ manual, similar to a checklist of actions, to ensure that new users of the gateway are able to most efficiently implement and begin using the platform
- **My Gateway Portal User Guide** – this document
- **My Gateway Product Services Guide** – provides the API and other technical information required to connect to the gateway
- **My Gateway Using UnionPay Guide** – provides the merchants and their customers detailed FAQs on using their cards at the merchant site.



# 11. Help

Context sensitive help is available by hovering over most buttons, menu items and objects on this portal. Online, searchable help and documentation is available from the <**Online Documentation**> option, under the <**Help**> menu.

The best information on using the My Gateway Portal is available in this guide and it is suggested that users read this document in conjunction with using the portal.

Users can click on the <**Contact Us**> option under the <**Help**> menu to automatically generate an email from their preferred email address to the portal support team. The email body should include the user's

- *Merchant Name as registered with My Gateway*
- *User Name as registered with My Gateway*
- *Email Address*
- *An alternative contact method (messenger or phone)*
- *Description of the support required*

Depending on the severity of the issue, the user may be allocated a support ticket and *My Gateway* will attempt to resolve any problem or provide any information as soon as practical.