globalpayments

Registration Merchant Portal

User Manual

Contents

Glossary

CONCEPT	DEFINITION
Sales reconciliation	A process that verifies the accuracy of transactions.
Chargeback/Dispute	Amount claimed by the cardholder to their issuing bank for a good/service purchased for the merchant to provide supporting documents in defense of the claimed transaction.
Disputes Management	Merchant Portal application for chargeback/dispute case tracking.
Reports	Reports with detailed transaction information.
Merchant Portal	Platform where you can view account statements and transaction detail using different types of reports.
MFA	Multi-factor authentication to protect user accounts.
MID	Merchant ID, consisting of prefix 670 + membership.
My Account	Platform that allows user and membership management, as well as access to Merchant Portal and Disputes Management.
Account Role	Account setup with allowed attributes, can be an administrator or a (secondary) user.
Transaction	Monetary exchange made between a cardholder and the merchant regarding a sale, refund or cancellation for a good/service.

Introduction to Merchant Portal

Merchant Portal is a digital platform that allows you to view detailed sales information through different reports, helping you reconcile your transactions. It is a **tool that improves administrative control**.

To access the portal, you must first become familiar with the My Account platform, where you will be able to:

- Manage affiliations with the support of additional users.
- Assign access to applications according to each user's role.
- Access Reporting and Disputes Management apps.

Before starting your **registration**, you must complete the process using a **computer**.

Once you finish creating your account, you will be able to access reports from any mobile device using the email address and password you selected.

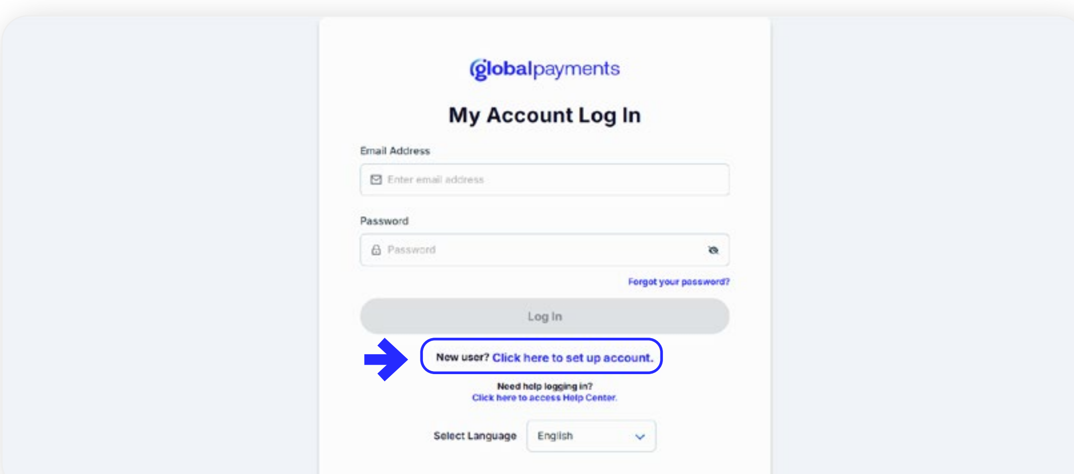
Getting Started in My Account

To begin registering your account, you will receive an email invitation from: noreply@reporting.globalpay.com.

1. Open the invitation email and click **"Create account"**.

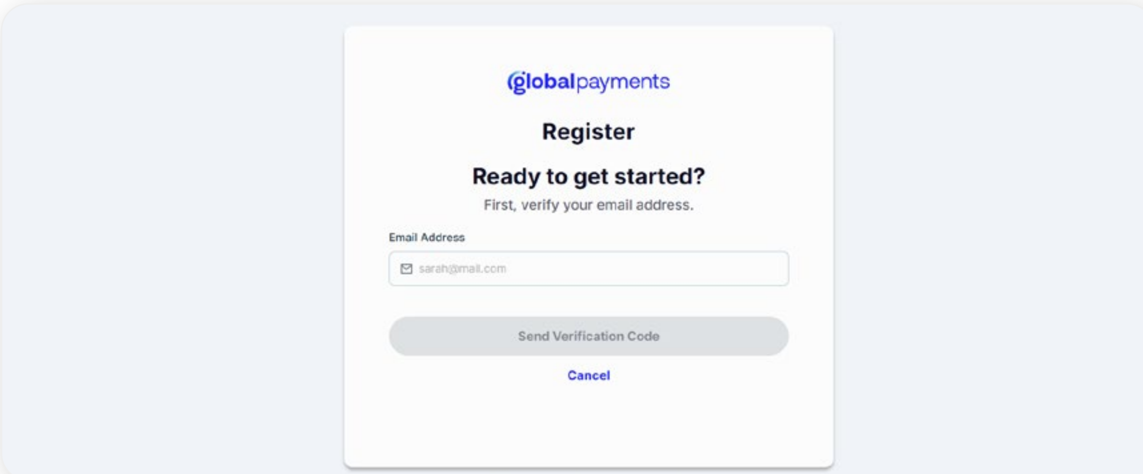
    •If you did not receive this email, check your spam folder or do directly to: https://myaccount.globalpayments.com/

2. You will be redirected to the My Account login page, where you can select your preferred language at the bottom of the screen. Then click **"Click here to set up your account."**



3. Enter the **email address** you will use for your Merchant Portal account.

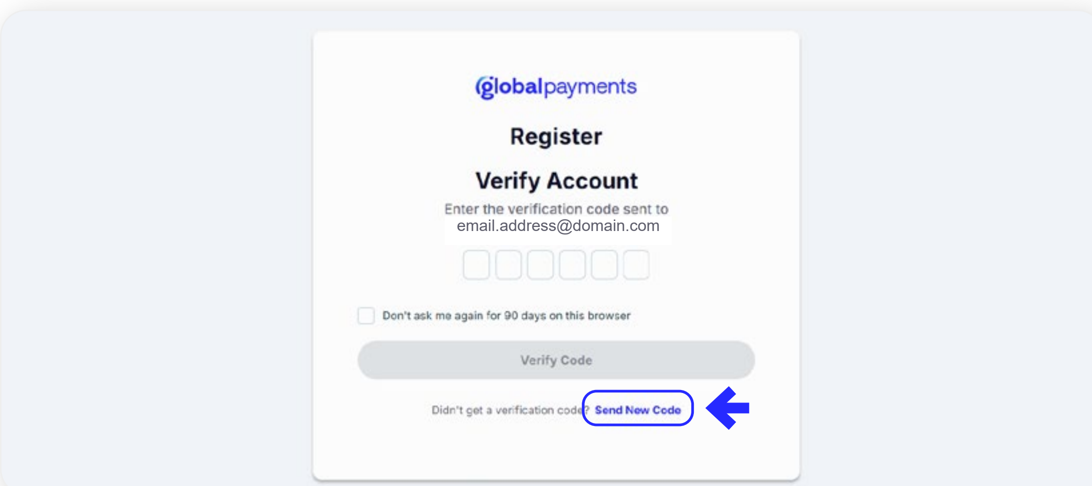
→ All platform notifications will be sent to this email address.



Confirm your email address by clicking **"Send Verification Code"**.

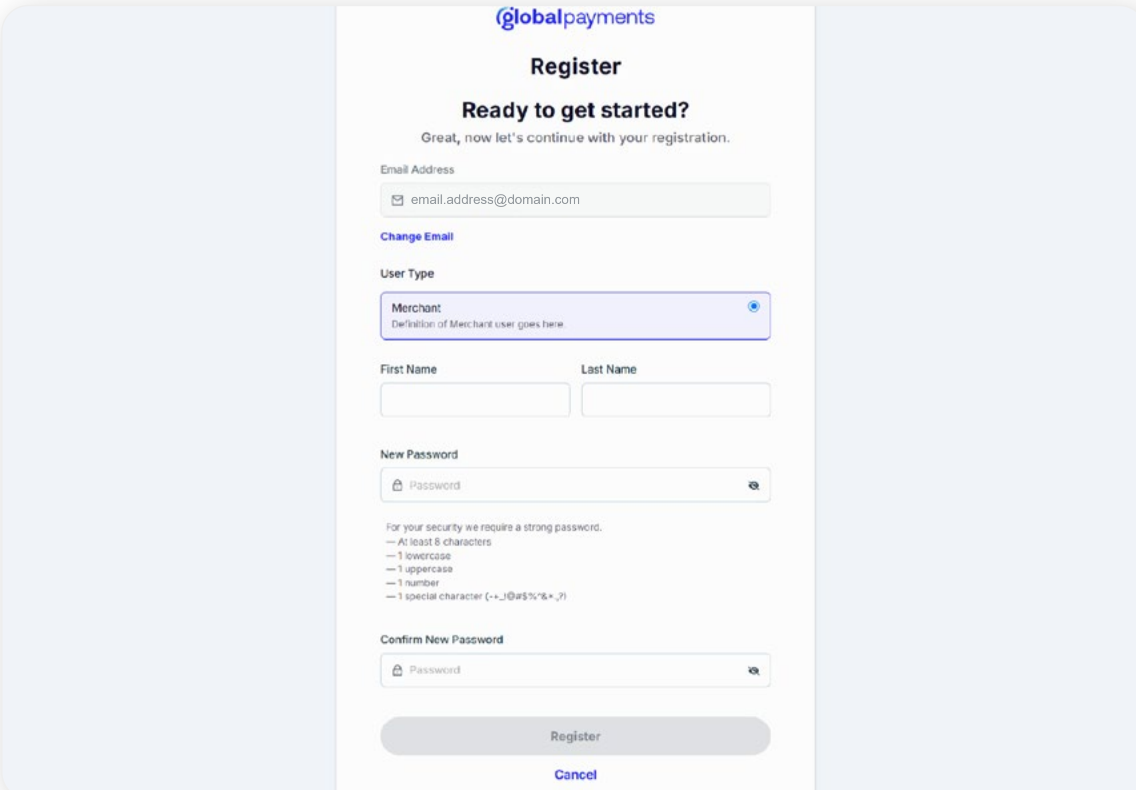
4. A message will appear indicating that a token was sent to your email. Enter it in the **Verification code** field and click **"Verify code."**

→ If you do not receive it, click **"Send new code."**



5. Complete the form with the required information. **Password must include**:

- 8-16 characters
- One lowercase letter
- One uppercase letter
- One number
- One special character (. , # $ % & ¿ ? _)



6. Click **"Register now."**

MFA Setup

You must configure a Multi-Factor Authentication (MFA) method to protect your account.

1. Select your preferred method:

Email Verification

a. Select **"Email"** and click **"Continue."**

b. Wait a moment and you will be redirected to the welcome screen.

Authenticator App

a. Select **"Authenticator App"** and click **"Continue."**

b. Download one of the listed apps on your mobile device.

c. Open the app and scan the QR code or enter the code manually.

d. Click **"Verify."**

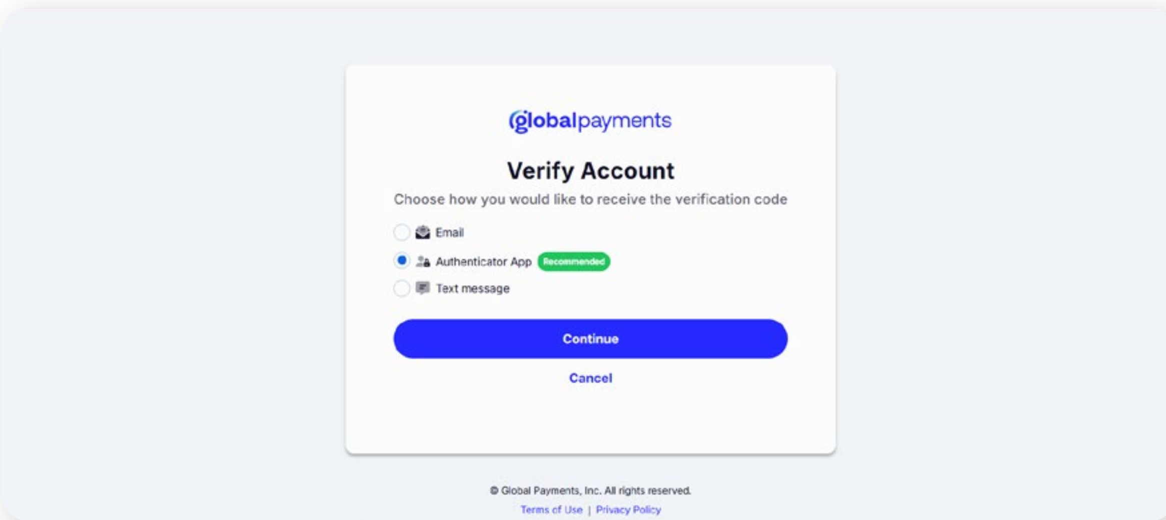
Text Message (SMS)

a. Select **"Text Message (SMS)"** and click **"Continue."**

b. Select your country.

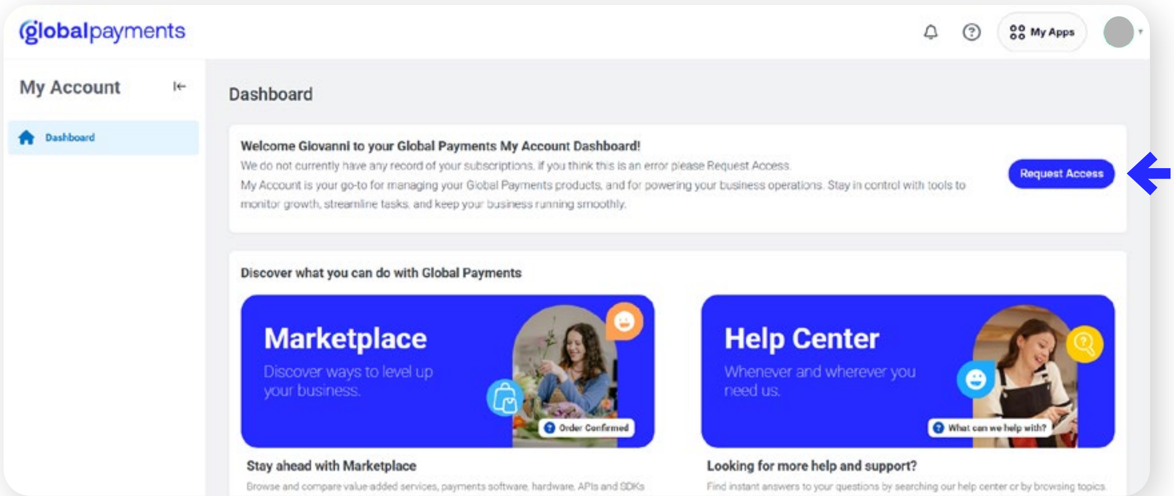
c. Enter your mobile number.

d. Enter the security code received.



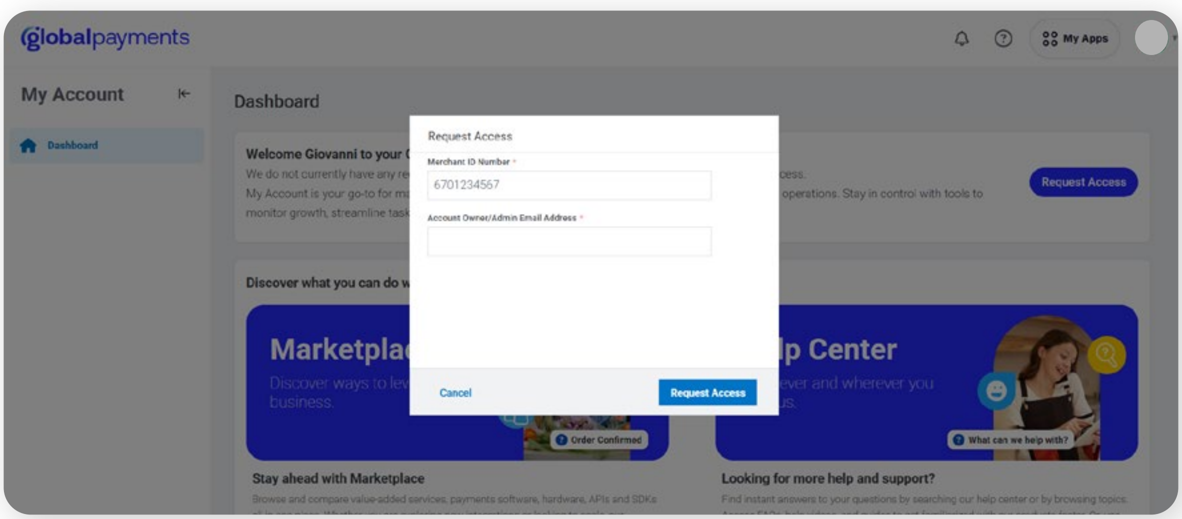
After logging in:

2. Click **"Request Access."**



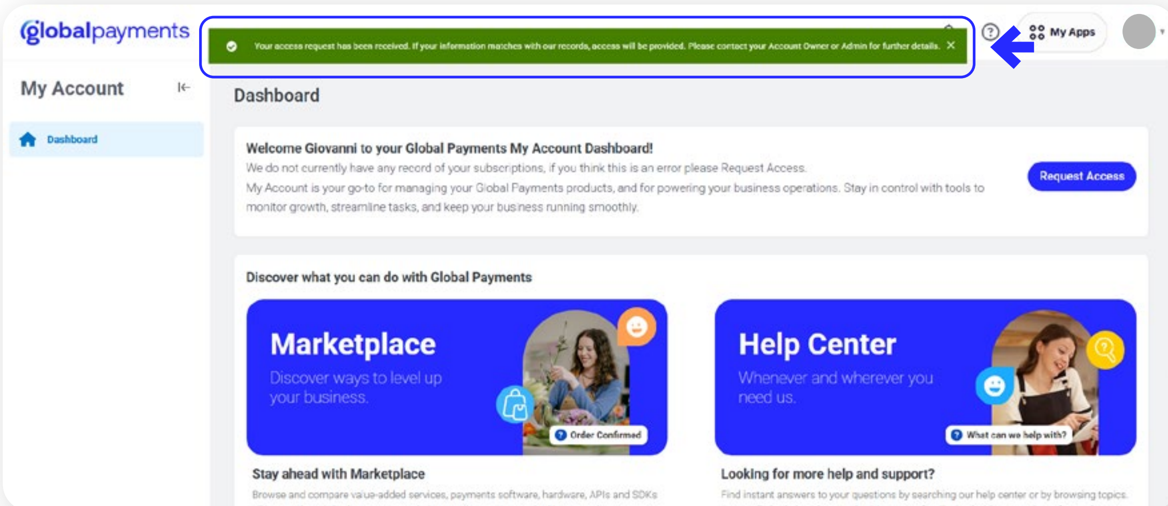
3. A pop-up will appear requesting:

- Merchant ID (MID): Enter prefix 670 + 7 digits
- Administrator email: This field is locked.



4. Click **"Request access."**

You will see a confirmation message at the top of the screen.



5. **Your registration is complete.** You must request access by contacting the **Contact Center**:

→ **(55) 1167 3737 / (55) 9085 8539**
→ Select the option **4 >** submenu **1**

Have the following ready:

- Username
- Email adddress
- Affiliations (all required)

→ If you have a different contact email, specify it.

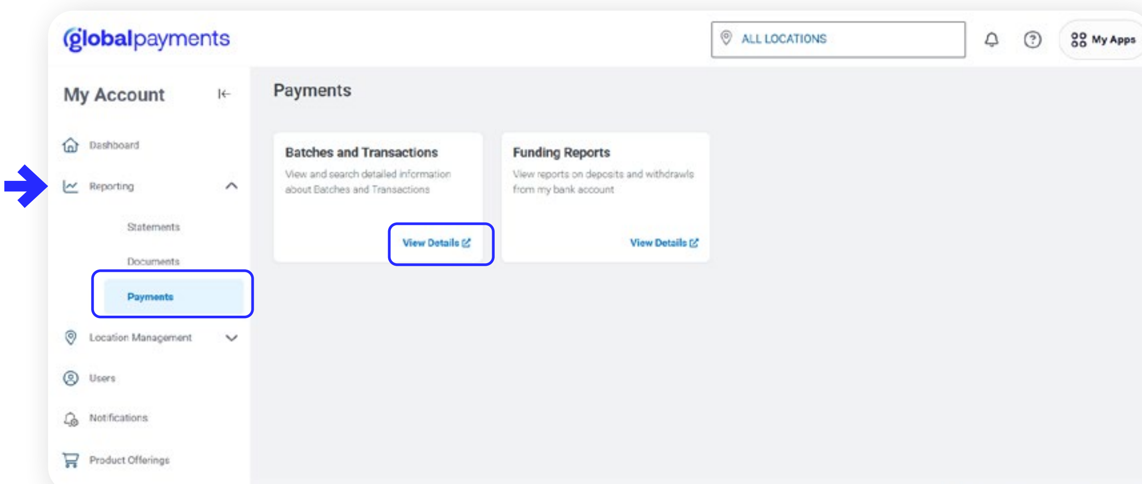
Access to Reporting

After requesting access, the Contact Center will assign you a service ticket number, which will be forwarded to the Merchant Portal support team.
Our team will confirm your access via email at merchant.portal.gptm@hgpay.com.mx.

→ Please note that the service time for handling requests is **2 business days**.

Once you receive confirmation:

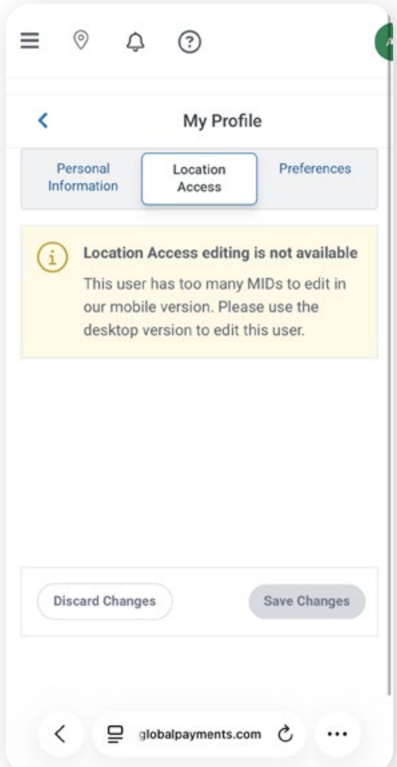
1. Log in at: https://myaccount.globalpayments.com/
2. In the left menu:
    a. Go to **Reporting**.
    b. Select **Payments**.
    c. Click **"View details"** for batches and transactions.



Access from any Mobile Device

Once access is granted, you can review reports from mobile devices.

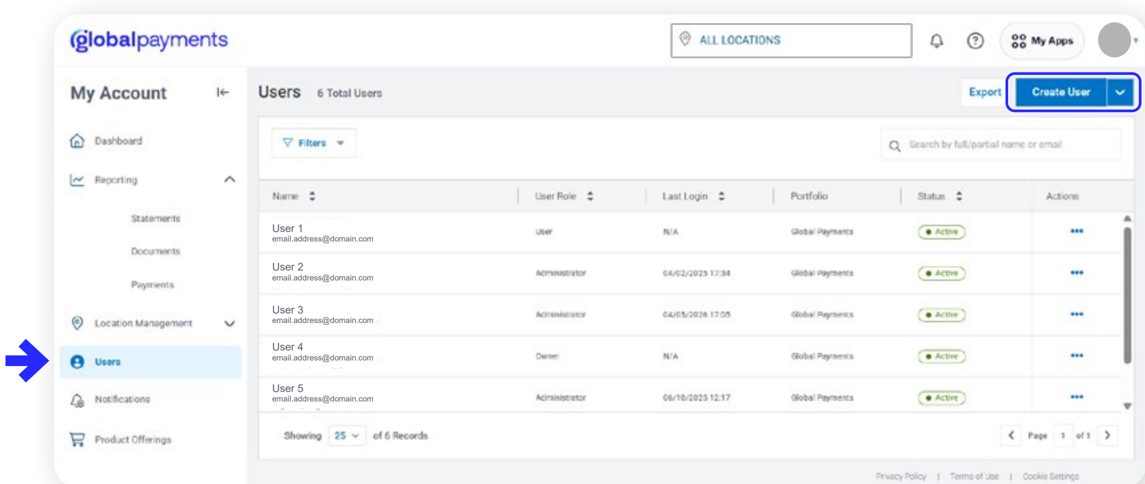
→ **Note:** On phones or tablets, some features may not be available, such as location access.



Additional Users

To create additional users:

1. Go to https://myaccount.globalpayments.com/
2. Select **Users** from the main menu.
3. Click **"Create user."**

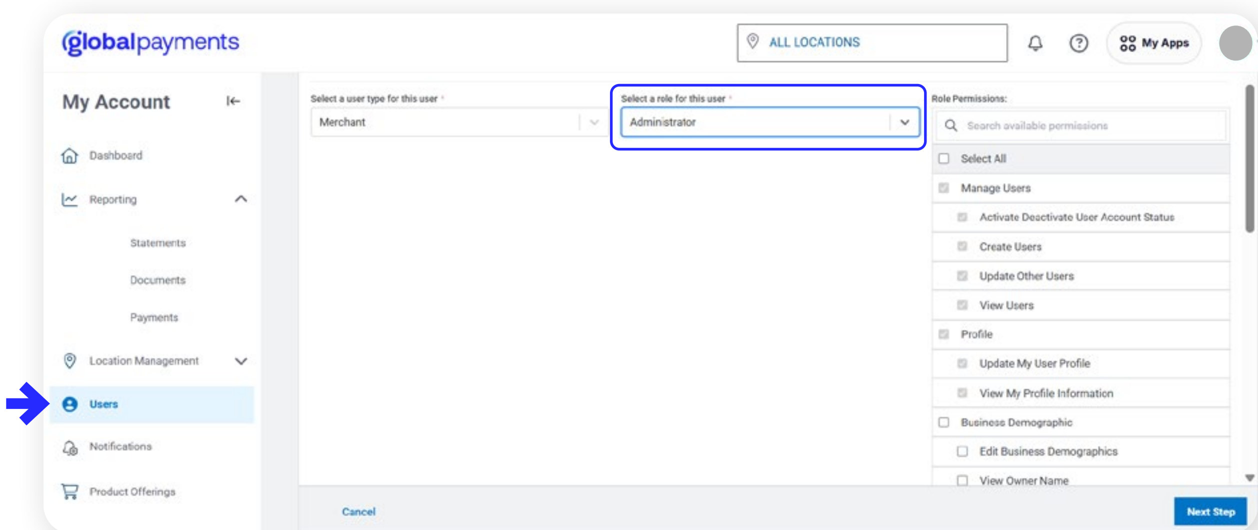


4. Enter:
    - First and last name
    - Email address
    - **User role**

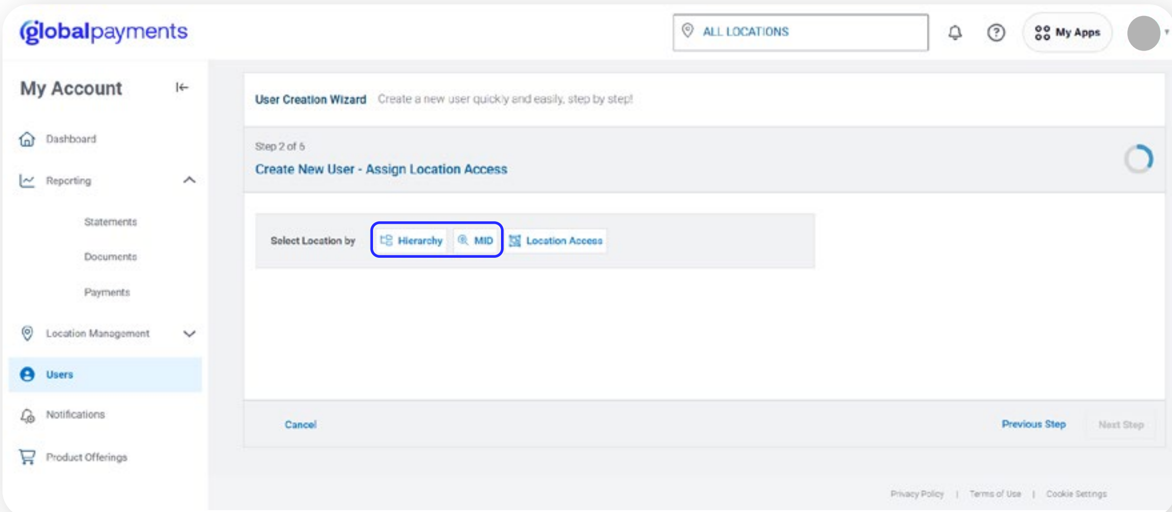
These are the user roles available:

Role	Description	Affiliations
Administrator	**Primary user.** Assigns affiliations and permissions.	Access to all affiliations in My Account.
User	**Secondary user.** Access is based on assigned permissions.	Access only to assigned affiliations.

Once you have selected the role, you will need to choose what permissions you want to grant to this account.



5. Click **"Next step."**
6. Assign the MIDs using:

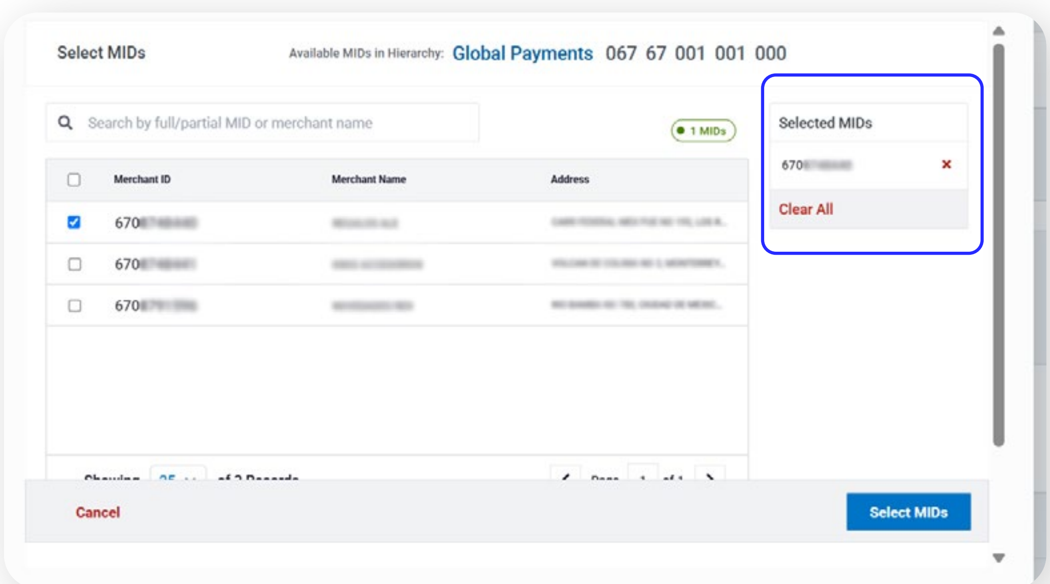


Hierarchy

a. Click **"Hierarchy."**

b. Under Select Actions, click **"Choose MIDs from List"** > find the MID and check the box. Or if you want to assign all MIDs, select **"Add All MIDs."**

c. Once you **check the box**, the affiliation will be added to the Selected MIDs section. Click **"Select MIDs."**



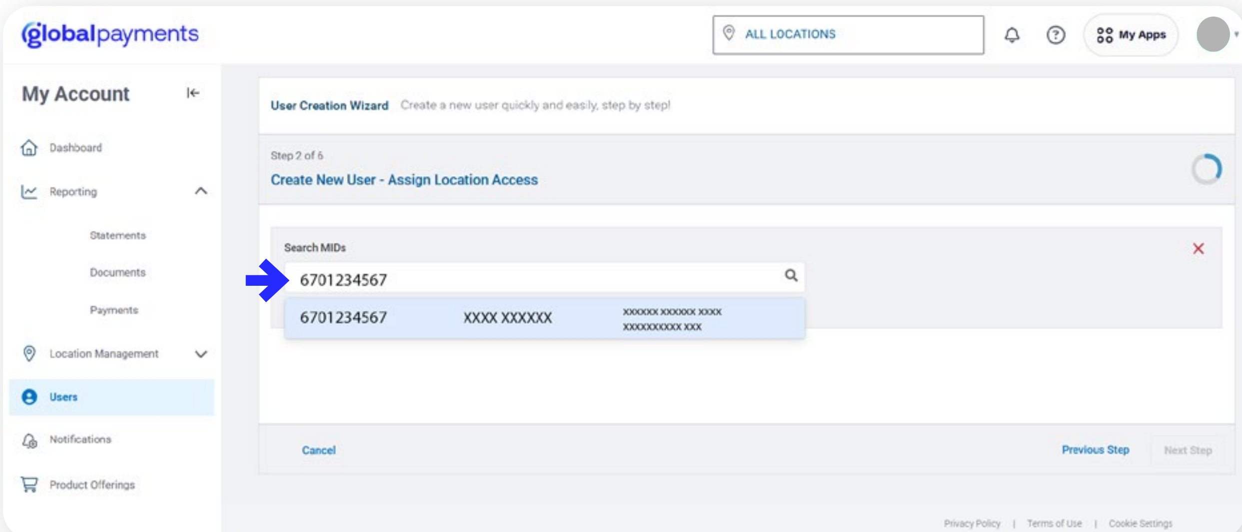
MID

a. Click **"MID."**

b. Enter the **prefix 670 + membership**.

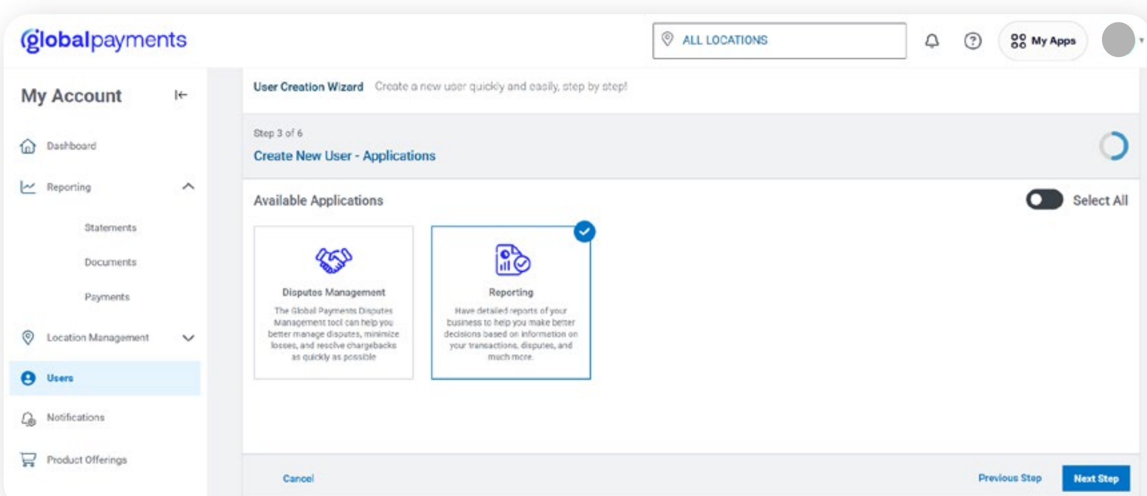
c. Select the option in the **blue bar** showing: MID, merchant name, and branch address.

d. Click **"Select MIDs."**

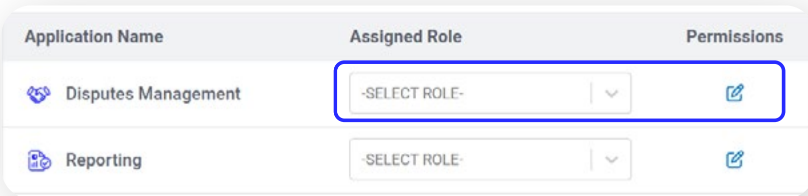


7. Once you have added the required MIDs, click **"Next step."**
8. The applications section will appear, where you can enable user access.

→ You may select both or only one, depending on the required functions.



9. Click **“Next step.”**
10. In this section, you will assign the user role for each application.
11. To configure permissions, click the **pencil icon.**

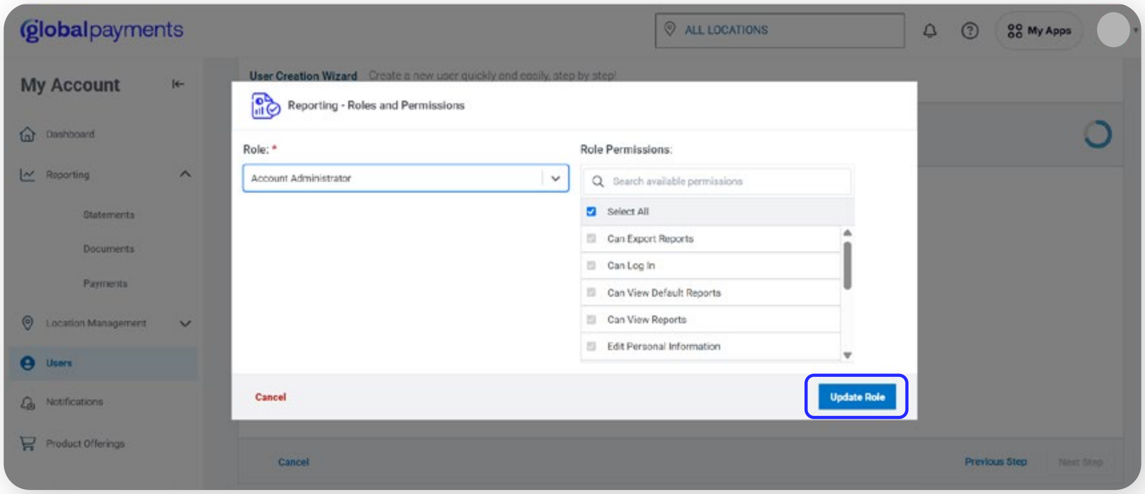


In the following table, you can find the recommended permissions.

Recommended Permissions

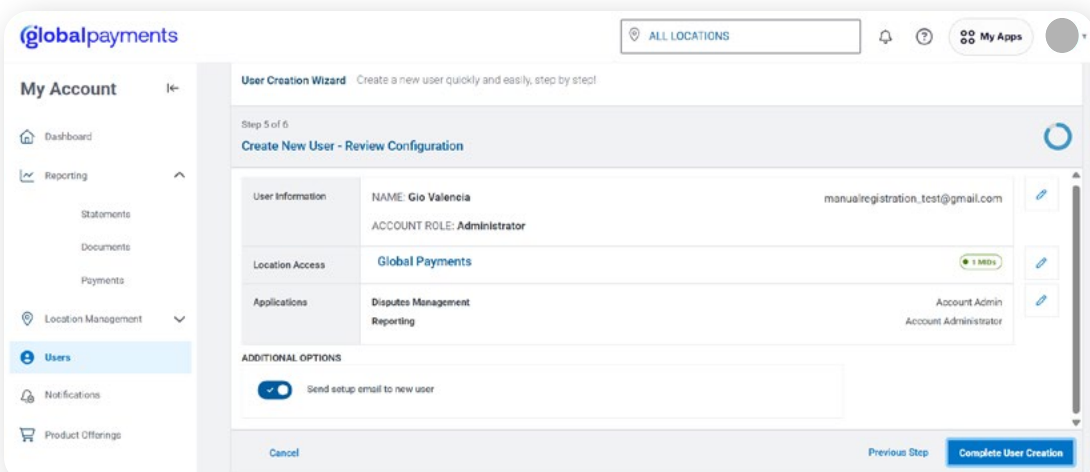
Create users	The user can create additional accounts.
View users	The user can view other accounts.
View account administrator	The user can view the account administrator.
Register MIDs	The user can add other MIDs to an account.
View transactions	The user can view the Transaction Finder tool.
View statements	The user can view account statements.
View reports	The user can view all available report listings.
Export reports	The user can export all available report listings.
Manage disputes	The user can respond to chargebacks.
Edit personal information	The user can update their preferred language, time format, and date format.

12. Once the permissions have been selected, click **“Update Role.”**



13. After completing the configuration, click **“Next step.”**

14. Finally, a summary of the user’s information will be displayed.



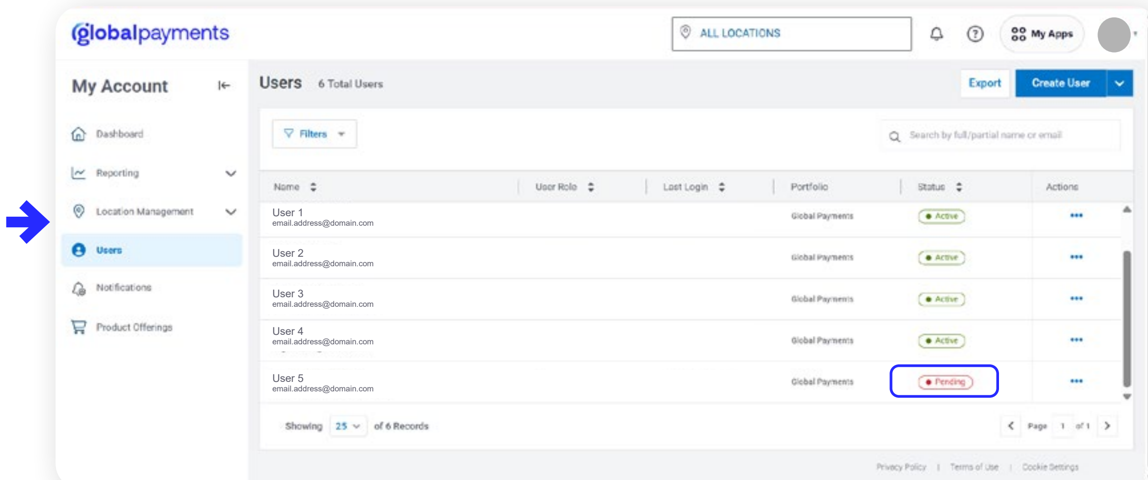
15. To complete the registration, click the **“Complete User Creation”** button.

User with "Pending" status

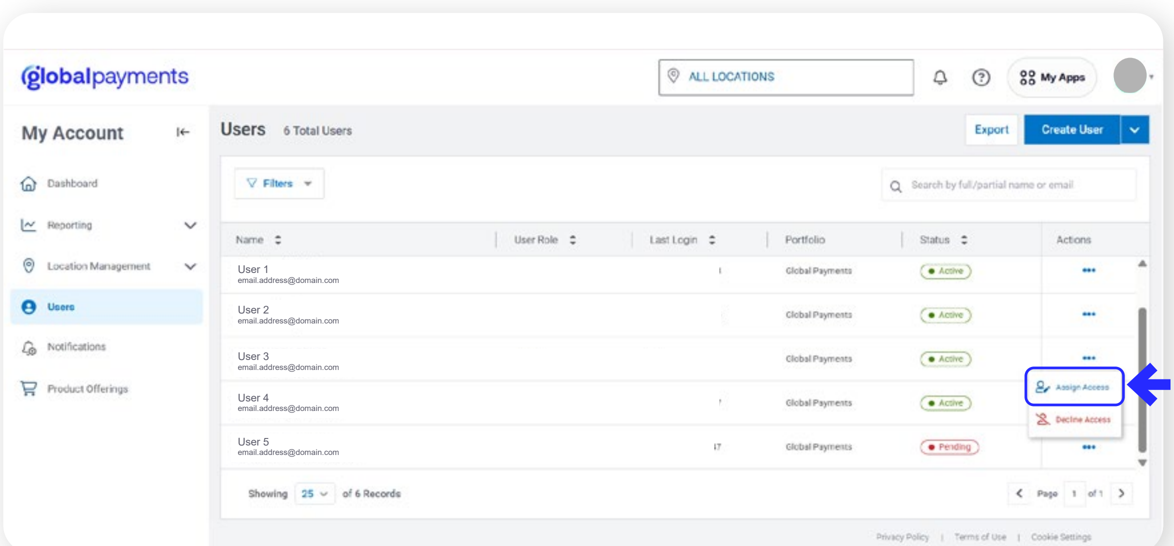
If a secondary user completes the registration process without following the steps in **Section 3: Additional Users**, the account will remain in a **"Pending"** status. In this case, the administrator must do the following:

1. Go to **Users**.

Here, you will see the new account with a **"Pending"** status.

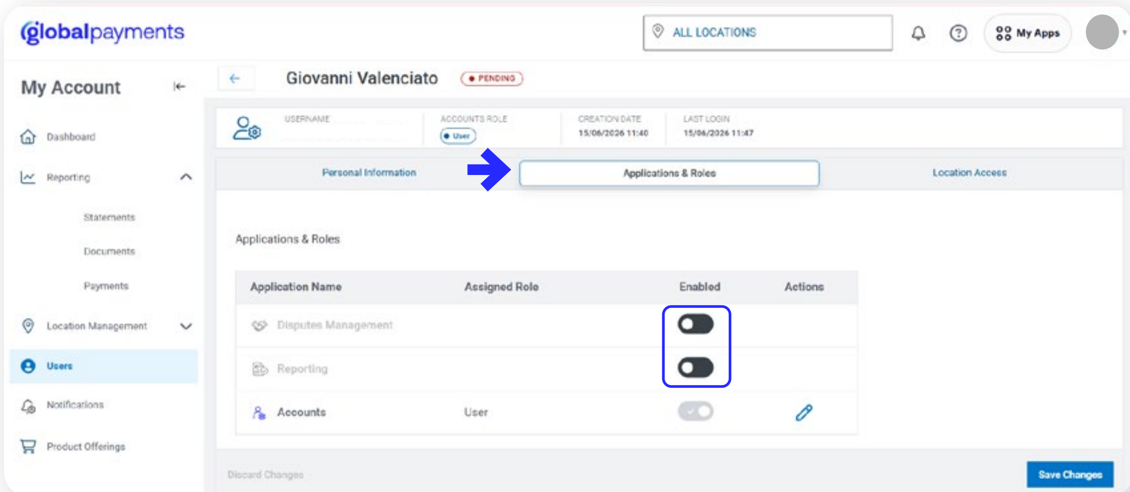


2. Click the three blue dots and select **"Assign access."**

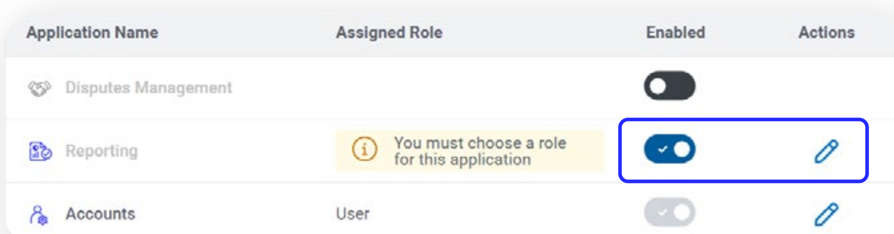


3. Go to the **Applications & roles tab**, where you can enable the applications. Select one or both options, depending on the required access:

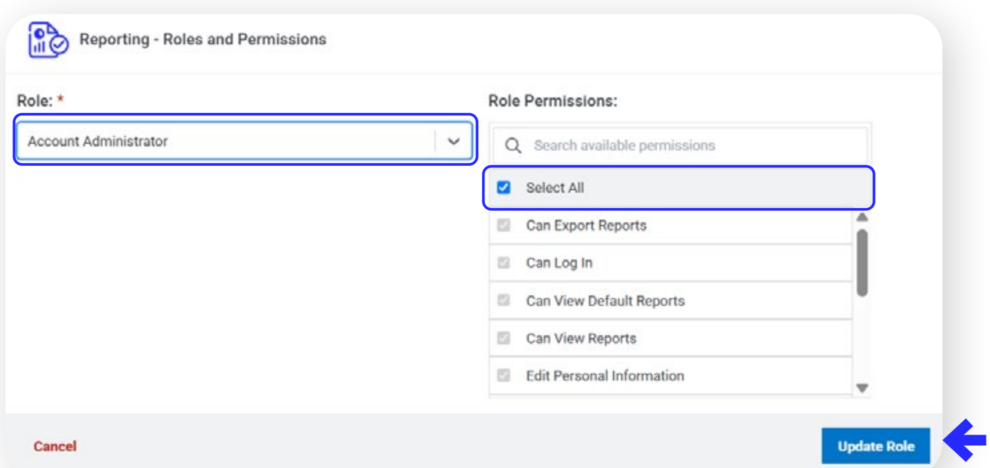
- **Reporting**
- **Disputes Management**



4. Once you activate each application, a **pencil icon** will appear. Click it to configure the user's role and permissions.



5. Once you confirm the role and permissions, click the **"Update role"** button.



6. Finish by clicking **“Save changes.”**

→ Please allow a few seconds for the platform to reflect the update and for the status to change to **Active**. Once completed, the new user will have access enabled to Merchant Portal.

Learn more

Now that you have a Merchant Portal account, we invite you to consult the Navigation, Reconciliation, and Chargeback Manual at https://www.hgpay.com.mx/merchant-portal

This will help you understand the platform’s different features and track your information on a daily and efficient basis.

→ If you have any questions, you can access our webinar **Training - Merchant Portal**, held on Wednesdays at 11:00 a.m. Mexico City time.

→ If you have a problem with your account, you can contact our Contact Center at **(55) 1167 3737 / (55) 9085 8539**, select option **4 >** submenu: **1** to turn over the support sheet to the Merchant Portal support team.

To generate the folio, you must share:

- User’s first and last names
- Account e-mail address*
- Membership(s)

*If you have a contact email different from the account email, you must specify it on your request.

For more information:

Call (55) 1167 3737 / (55) 9085 8539

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