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1.0 INTRODUCTION

The portal provides the user the ability to view CC transaction reports and assist with account reconciliation. Contact your Agilysys representative in order to create your log in information.

2.0 ACCESS THE PORTAL

Go to https://portal.agilysys.freedompay.com/Login.aspx and Enter Username and Password as provided.
Upon successfully signing in to the Portal, the user will be brought to the Default Home Page.

*Notice the page information bar in the top right-hand corner.

**User:** Person currently logged in.

**Make this Default Page:** Navigate to a page that is the preferred default screen seen after logging in to the reporting portal and select this option to save the page as the Default Home Page.

**My Account:** Gives general information about the account (name, address etc…) and allows password to be changed.

**Log Out:** Allows user to exit session.

### 3.0 REPORTS

From the drop down menu at the top of the page, select “Analytics”.

![Analytics screenshot]
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On the left border, four options will be displayed:

Report Manager
Report Scheduler
Report Archive
View Transactions

3.1 Report Manager

Choose from one of the various reports in the “Name” column and click on “Run Report”

Reports screen opens with a list of Available Reports and Time Period options. Select the Report name to view and a time period. Click Run Report and the report will be displayed. All times are displayed in Eastern Standard (EST).
The user has 3 radio buttons in which the report can be specified.

The first radio button allows the user to choose a pre-configured time period. Selected date ranges will then become the default setting for the specified report.

Today retrieves all transactions from the time of request to 12:00 am that day.

Yesterday retrieves all transactions prior to closing for the previous business day.

Week To Yesterday retrieves all transactions beginning with the first day of the current week (Sunday) through close for the previous business day.

Month To Yesterday retrieves all transactions beginning with the first day of the current month through close for the previous business day.
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**Year To Yesterday** retrieves all transactions beginning with the first day of the current year through close for the previous business day.

**Last Week** retrieves all transactions for the full week prior to the current week.

**Last Month** retrieves all transactions for the full month prior to the current month.

**Last Year** retrieves all transactions for the full year prior to the current year.

The second radio button allows the user to specify reports by days, weeks, months, or years.

![Date selection interface](image)

The third radio button allows the user to specify a particular date range.

Once the date range is selected, click the “View Report” button to view the selected report.

### 3.2 Report Scheduler

In order to schedule a run of a report click the Schedule link to the right of the report.
Choose report from dropdown and specify time period by using the three options as outlined in the run report section. TIP: If a daily report of activity from previous day is desired choose Most Recent Full 1 Day as option for run time.

Hit Next

Designate name of report and schedule (start time, start date, and end date). Choose frequency for either every day, every weekday, or repeat number of days.

Hit Next
Designate desired output and email address to send report to. Multiple email addresses may be utilized and separated by “;”.

The Report Scheduler link on the left side of the page provides a summary of reports scheduled to run.

### 3.3 Report Archive

To view any previously run reports, navigate to **Report Archive** in the left margin.

Set the search parameters for the archived report by selecting from “Reports By Date, Active Reports, and Deleted Reports.”
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If the parameters set are not specific enough, utilize the filter tool to narrow the search.

An archived report can be edited and recycled for future use by selecting “View” and adjusting the targeted date of the report.

3.4 View Transactions

Users will have access to view recent transactions for their user defined dealer locations. View Transactions will display the most recent 5,000 transactions or up to 31 days, whichever is less. Historical transactions may be pulled up to 14 months.

Select View Transactions from the left margin.

A report of recent transactions for the user defined dealer will display. Default sort order is “Date” starting with the most recent. However, filters are available for each of the columns.
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To filter the recent transactions by Store, Start Date and End Date, use the filter options located at the top of the grid.

**View Transactions**

<table>
<thead>
<tr>
<th>Store: The DEV Store (1470893996)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Date: From 12/3/2013 To 12/10/2013</td>
</tr>
</tbody>
</table>

(Note: Date range cannot exceed more than 7 days)

If the user has access to more than one location, the user can choose the location to view the recent transactions. If the user does not choose a location, all transactions will appear.

The Start and End Dates default to a 7-day period.

To use additional filters, enter search criteria and click the filter selection. A menu box will display for the user to select the search criteria. Click on the filter selection to view the qualifying transactions.

To reset the screen without filters you must choose NoFilter to return to the default setting.

To view the details for a single transaction, select “View” from the table as depicted below.

Details for the corresponding transaction will display.
If a duplicate receipt is needed, click print or email.

To download the transactions into a Microsoft Excel spreadsheet, click “Export” to export the current page of transactions or click “Export All” to export all available transactions (maximum 5000). If the “Export With Line Items” checkbox is checked then the Export button will produce a file with all of the corresponding line items for each transaction.
4.0 VIRTUAL TERMINAL

To access functions under the Virtual Terminal, select the drop down arrow as depicted below and select Virtual Terminal.

4.1 Processing a Void

Select Void from the Tools Links in the left margin to process a Void.

From the list of transactions displayed, locate the transaction to be voided and click on “VOID” to the right.

A confirmation to void the transaction will appear.
A confirmation will be displayed.

4.2 Processing a Refund

Select **Refund** from the Tools Links in the left margin to process a refund.
Search for the existing sale to process the refund against by choosing a start and end date. If any additional information is needed to narrow the search, enter the criteria in the Search Criteria field and select Search.

Verify that the pop-up blocker is disabled on your web browser. Selecting Refund will open a new window with the transaction details of the previously entered sale. Enter the amount of the refund to submit against the Grand Total located in the top left corner as depicted below and Submit.

If a refund has already been applied to a previous authorization, the Current Amount Refunded can be located in the bottom right corner.
Selecting Submit will open a separate window with the Invoice details which can be printed or emailed for the customer’s reference.

Sales that have been refunded will appear as “Return” in the “transaction Type” column.

5.0 TROUBLESHOOTING

What if I get a “User Not Authorized” message at sign in?
- Contact your local System Administrator within the dealership.

What if the system is slow or freezes up?
- First contact your System Administrator within the dealership to see if there is a network issue.

What if the fields are not aligned correctly when using Internet Explorer 9?
- Click the “Compatibility Mode” button to turn on Compatibility Mode – Click the icon that looks like a broken page, in between address field and the refresh button on the url line.

What if an older version of screens appears after a software version update?
- Clear out temporary internet files and cookies. Note: This will remove all saved usernames and passwords that are saved on your computer for all websites.
  - For Internet Explorer 9 users:
    1. Click the Tools menu, the click Internet Options
    2. In the history section, click Delete button – This opens the Delete Browsing History screen
    3. Click Delete files button and click OK button
    4. Click Delete cookies button and click OK button
    5. Click Delete forms button and click OK button
    6. Click Close button in the Delete Browsing History screen
    7. Click OK button in the Internet Options screen