Barclays iPortal: Merchant services guides

November 2023

BARCLAYS

Contents

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How to create new users for iPortal Merchant Services

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Creating a new user

Only client admins can create new user profiles.

Start by logging in to iPortal and selecting 'Users' from the 'Administration' drop-down menu.

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Creating a new user (cont'd)

Click on 'Add New User'.

Creating a new user (cont'd)

Fill in the fields with the user's details.

If the user doesn't have a telephone number, then you can add a mobile number instead. Make sure their phone number and email are correct as they'll be used for future alerts.

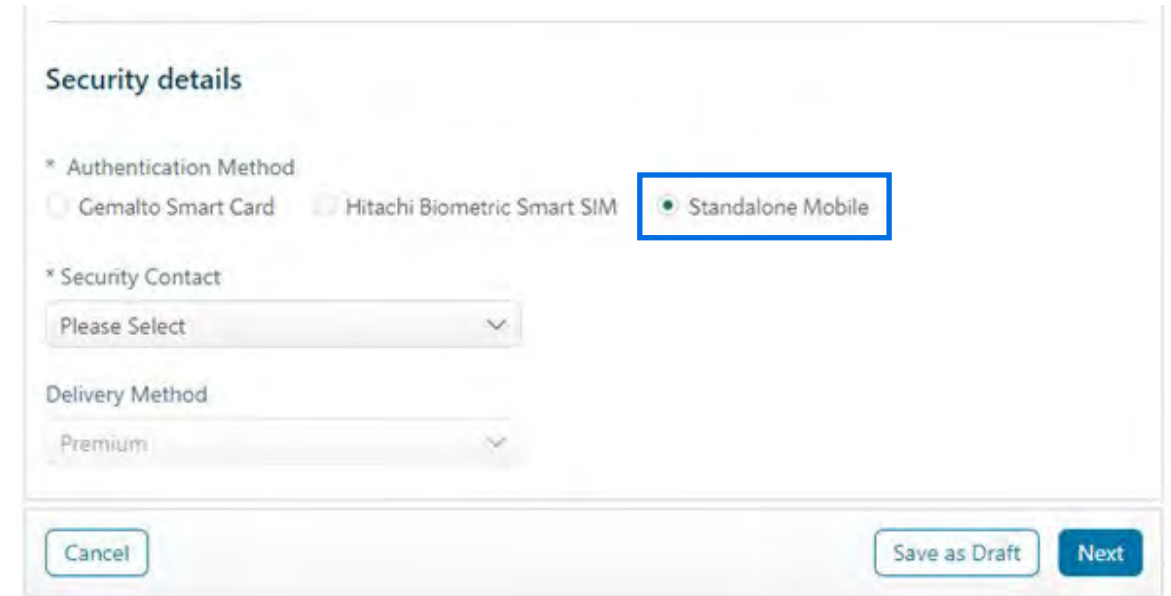We'll only use the address to send out the PIN number.

Creating a new user (cont'd)

When you reach the 'Security details' section, select 'Standalone Mobile'. (You can find full details on how to download the app, set it up and log on to iPortal here.)

If you'd like for the user to receive an authentication card, select 'Gemalto Smart Card' at the top. Then choose who will receive the card on behalf of the user. They'll need to forward the card on to the user.

The PIN, however, will be posted directly to the user. Please allow three to five working days for delivery to a UK address and 10 working days for an overseas delivery.

Security details

* Authentication Method

○ Gemalto Smart Card   ○ Hitachi Biometric Smart SIM   ● Standalone Mobile

* Security Contact

Please Select ▾

Delivery Method

Premium ▾

Cancel   Save as Draft   Next

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Creating a new user (cont'd)

Expand the 'Barclaycard Merchant Services' tab by clicking on (1).

Click on the toggle button to switch on Merchant Services access.

Creating a new user (cont'd)

Review the details to make sure they're correct and then click 'Submit' to complete the setup.

This will then be sent to the second administrator for approval (unless you're the sole admin).

To approve the request, go to the iPortal home page and select 'Authorise' from the 'To Do' drop-down menu. Scroll down to find the user, select the user and tap 'Authorise'.

1 Role Profile listed

Default - Barclaycard Merchant Services   Added

This role provides access to Barclaycard Mercha...

Back   Cancel   Save as Draft   Submit

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Ordering a card reader

If you've selected 'Standalone Mobile' access for your new user, you don't need to order a card reader.

If your user would prefer their own card reader, you can order them one via iPortal. Card readers can also be shared between users

Click on 'Administration' and choose 'Device readers' from the drop-down menu.

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Ordering a card reader (cont'd)

Choose 'Smart Card' from the 'Device Type' drop-down.

Fill in the remaining fields and remember to make sure that the address of the security contact is correct. Sometimes security contacts change their workplace location but their old address may remain on the system.

Once you're done, tap 'Confirm'.

Please allow three to five working days for delivery to a UK address and 10 working days for an overseas delivery.

Assigning MIDs and services to your users

On the iPortal home page, choose 'Merchant services administrators' from the 'Administration' drop-down menu.

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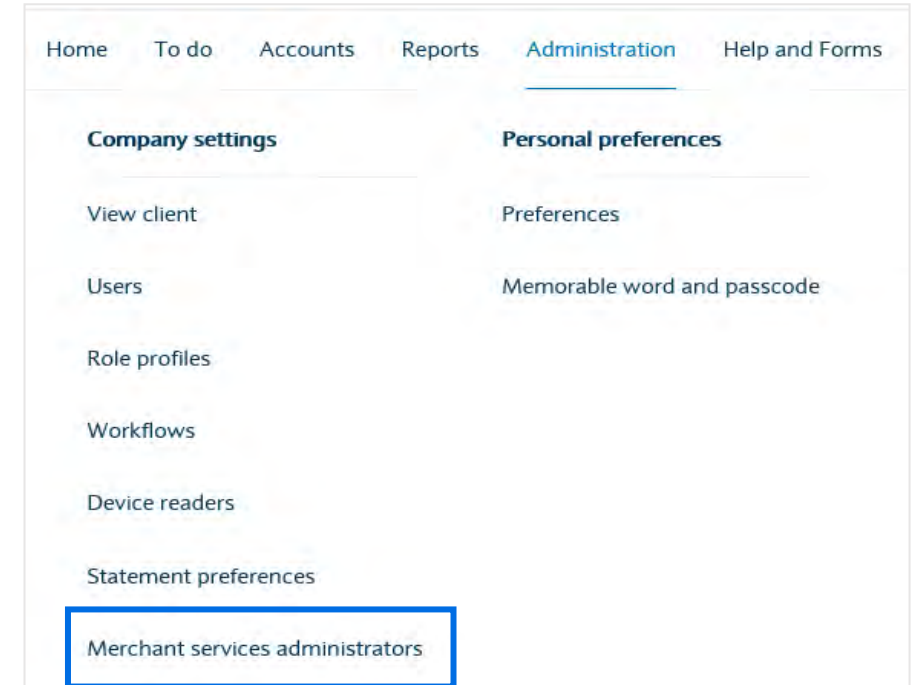
Assigning MIDs and services to your users (cont'd)

Scroll down to the 'Pending users' list, click on the three dots and then select 'Set up user'.

Client users management
Manage users

iPortal client details

iPortal client name	E2EClient-PP-01
iPortal client ID	E2ECLIENTP.101102

Pending users

Showing 1 - 2 of 2 users

Name	Role	Hierarchies	Services	
KPBUName1	User	Pending	Pending	⋮
KPuname	User	Pending	Pending	Set up user

Active users

Showing 1 - 10 of 27 users

Name	Role	
E2ECBNS TestBU	User	⋮

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Assigning MIDs and services to your users (cont'd)

Choose the MIDs, chains and outlets you want the user to have access to.

Then click 'Assign merchant IDs' to proceed.

Assigning MIDs and services to your users (cont'd)

Choose the services you want the user to have access to and then click 'Assign merchant services' to complete the setup.

Assign hierarchies — 2 Assign services — 3 Confirmation

User details

Name	KPBUName1
Email	KPBUName1@gmail.com

Assign merchant services   0 selected

	Merchant service	Description
☐	Chargebacks	View and manage your chargebacks
☐	Statements	View and download statements from the last 13 months
☐	Statement Preferences	Opt to receive your statements electronically
☐	Settlements	View settlement information from the last 28 days
☐	Transactions	View and download transaction information

Cancel   Assign merchant services

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Activating a smart card

Once the user has their PIN, smart card and card reader, you can activate their smart card via your iPortal.

Head to the 'Administration' tab and select 'Users' from the drop-down menu.

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Activating a smart card (cont'd)

Find the user on the list.

Then, click the three dots (1) next to their profile and then select 'Activate User'.

Assigning Merchant Services to existing users

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Assigning a role profile to users

If you've already created a user but haven't assigned Merchant Services to the user, then please follow the steps in this section. Please note, only client admins can assign role profiles.

Start by logging in to iPortal.

Click on the 'Administration' tab and select 'Role profiles' from the drop-down menu.

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Assigning a role to the profile (cont'd)

Go into 'Barclaycard Merchant Services', click on the three dots and then click 'Assign Users'.

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📄 Admin reports
Audit report
Outstanding activity report

Role Profiles

Please select an existing Role Profile to manage or click New Role Profile.
To locate a Role Profile Search by Role Name, Product, Description, Services or Sub Services.

New Role Profile

Additional setup is required for the products listed in this section as the role profile assignment will only enable the service. To manage the permissions associated with that service you will need to update these within the product themselves. Please use the links below to manage the appropriate product.

Manage Merchant Service

Filter Role Profile

All Roles

🔍 Search for Role Profile

6 Role Profiles listed

Barclaycard Merchant Services   ⊖

Default – Barclaycard Merchant Services   ACTIVE

This role provides access to Barclay...   **Barclaycard Merchant Service**
Users Associated: 14

Assign Users

Fund Investments   ⊕

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Assigning a role to the profile (cont'd)

Switch on the user's profile for Merchant Services.

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Assigning a role to the profile (cont'd)

This will then be sent to the second administrator for approval (unless you're the sole admin).

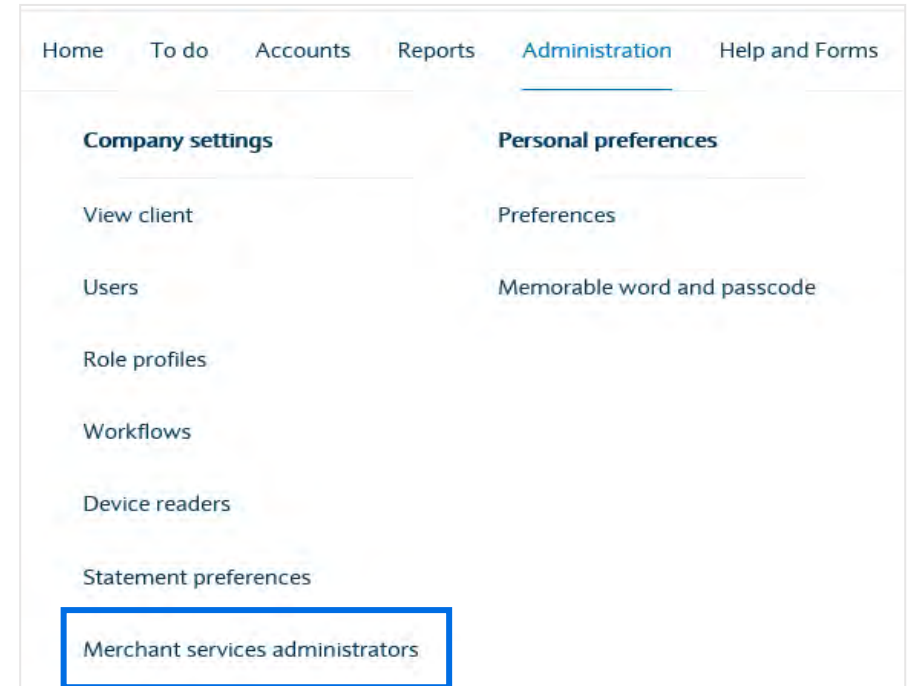To approve the request, go to the iPortal home page and select 'Authorise' from the 'To Do' drop-down menu. Scroll down to find the user, select the user and tap 'Authorise'.

Assigning MIDs and services to users

On the iPortal home page, click on the 'Administration' tab and select 'Merchant services administrators' from the drop-down menu.

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Assigning MIDs and services to users (cont'd)

Scroll down to the 'Pending users' list, click on the three dots and then click 'Set up user'.

Assigning MIDs and services to users (cont'd)

Choose MIDs, chains and outlets you want the user to have access to.

Once you've selected the relevant MIDs, click 'Assign merchant IDs' to proceed.

Assigning MIDs and services to users (cont'd)

Choose the services you want the user to have access to and then click 'Assign merchant services' to complete the setup.

Assign hierarchies — **2** Assign services — **3** Confirmation

User details

Name	KPBUName1
Email	KPBUName1@gmail.com

Assign merchant services   0 selected

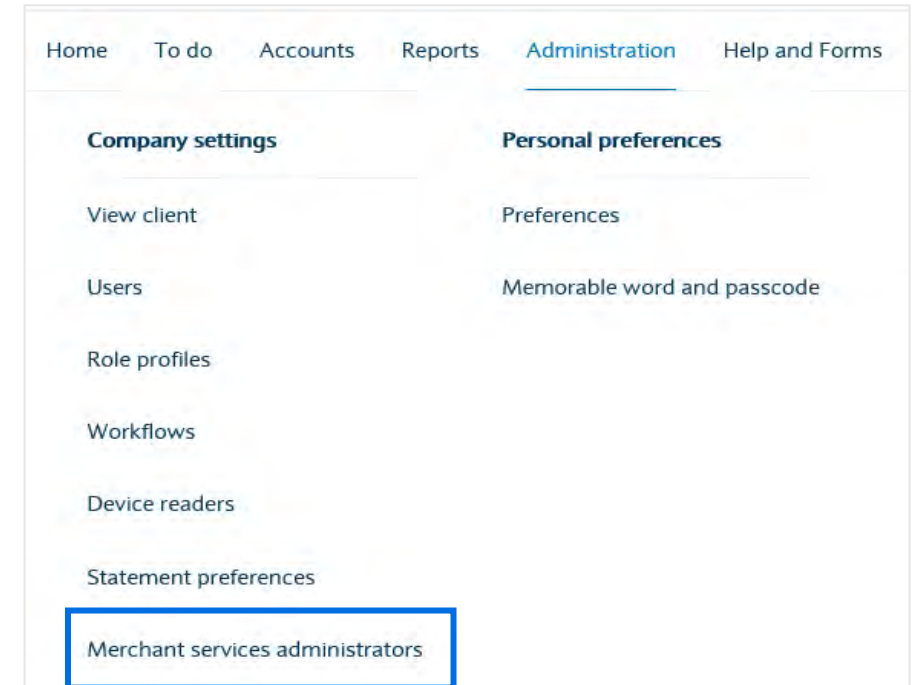|	Merchant service	Description
☐	Chargebacks	View and manage your chargebacks
☐	Statements	View and download statements from the last 13 months
☐	Statement Preferences	Opt to receive your statements electronically
☐	Settlements	View settlement information from the last 28 days
☐	Transactions	View and download transaction information

Cancel   Assign merchant services

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Amending a user's access

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Amending a user's access

Client admins can amend a user's access to MIDs, services or features of iPortal.

On the iPortal home page, click on the 'Administration' tab and select 'Merchant services administrators' from the drop-down menu.

Home   To do   Accounts   Reports   Administration   Help and Forms

Company settings   **Personal preferences**

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Amending a user's access (cont'd)

Scroll down to the active user list and click on the three dots next to a user.

To change MID access, select 'View hierarchies'.

To change service access, select 'View services'.

Amending a user's hierarchy

To amend a user's hierarchy, click on the 'Amend hierarchies' button.

Assigned hierarchies
Manage users

User details

Name	Nicholas Capper
Email	nicholas.capper@barclays.com

Assigned hierarchies

MID	Name	Address	Type	Hierarchies
> 1303350	IPORTAL LCT 2	1234 PAVILLION DRIVE, NN4 7SG	Group	1 chain, 2 outlets

Cancel   Amend hierarchies

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Amending a user's hierarchy (cont'd)

Tick all boxes next to MIDs that you want the user to have access to.

Click 'Amend hierarchies' to complete the change.

Removing a user

Removing a user

To remove a user, head to the iPortal home page, click on the 'Administration' tab and select 'Users' from the drop-down menu. Please note, only client admins can remove users.

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Removing a user (cont'd)

Find the relevant user from the list.

Click on the three dots (1) next to the user's profile and then tap 'Delete User'.

Updating your memorable word and passcode

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Updating your memorable word and passcode

To update passcodes, click on the 'Profile' tab in the top-right corner and choose 'Memorable word and passcode'.

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Updating your memorable word and passcode (cont'd)

Type in your new memorable word and passcode.

Make sure they meet the security requirements, which can be found by clicking on the question mark symbols (1)(2).

Then click 'Submit' (3).

Memorable Word and Passcode

Enter Memorable Word and Passcode
Please note that the information you enter here will overwrite any Memorable Word and Passcode information previously submitted via Barclays.Net

1

* Enter Memorable Word

⑦

* Re-Enter Memorable Word

2

* Enter Passcode

⑦

* Re-Enter Passcode

3

Cancel   Submit

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Ordering a card reader/smart card

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Ordering a card reader

If your user would prefer their own card reader, you can order them one via iPortal. Card readers can also be shared between users.

Click on 'Administration' and choose 'Device readers' from the drop-down menu. Please note, only client admins can order or deactivate devices.

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Ordering a card reader (cont'd)

Choose 'Smart Card' from the 'Device Type' drop-down.

Fill in the remaining fields and remember to make sure that the address of the security contact is correct. Sometimes security contacts change their workplace location but their old address may remain on the system.

Once you're done, tap 'Confirm'.

Please allow three to five working days for delivery to a UK address and 10 working days for an overseas delivery.

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Activating a smart card

Once the user has their PIN, smart card and card reader, you can activate their smart card via your iPortal.

Head to the 'Administration' tab and select 'Users' from the drop-down menu.

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Activating a smart card (cont'd)

Find the user on the list.

Then, click the three dots (1) next to their profile and select 'Activate User'.

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Ordering a smart card replacement

Find the relevant user from the user list. Click on the three dots (1) next to the user and then select 'Order Replacement Device'.

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Ordering a smart card replacement (cont'd)

State why you need to order a replacement and choose a security contact that can give the new card to the user.

Remember to check that the address of the security contact is correct. Sometimes security contacts change their workplace location but their old address may remain on the system.

Once you're done, click 'Submit'.

Order Replacement device

* Reason for Replacement

Please Select

Security details

* Authentication Method

● Gemalto Smart Card   ○ Hitachi Biometric Smart SIM

* Security Contact

Nicholas Capper

Delivery Method

Premium

Cancel   Save as Draft   Next

Order replacement Card   Added

Replacement Reason: Card damaged

Back   Cancel   Submit

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How to manage your chargebacks

Looking at the chargeback dashboard

Once a user has logged in, click on the 'Merchant Services' tab. (1)

There, you'll see customer MID numbers, the customer name and the number of chains and outlets associated with the customer. You'll also see the number of chargebacks that haven't gone through.

See a chargeback in more detail
Select 'Open' (2) to view an ongoing chargeback case or 'Submitted' (3) to see cases that have been submitted. Or click on the three dots (4) to see accepted or expired cases.
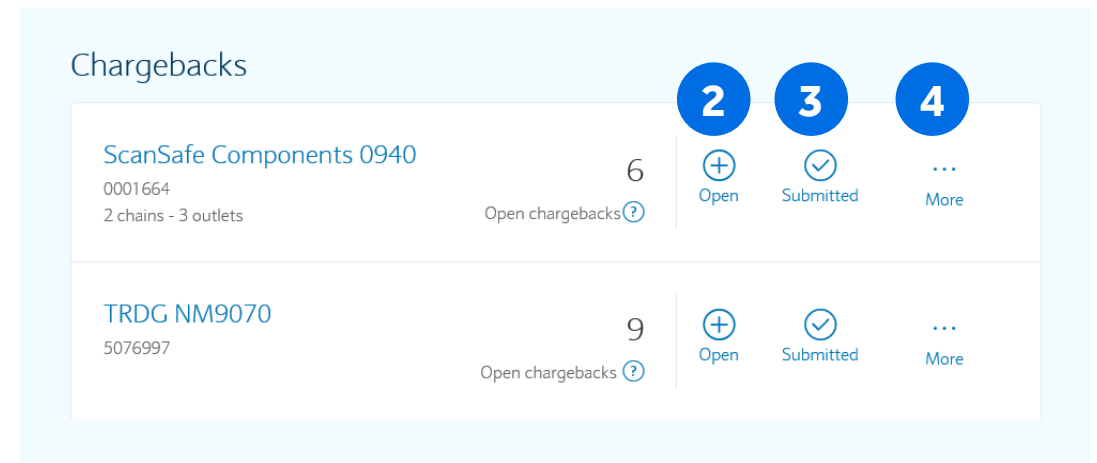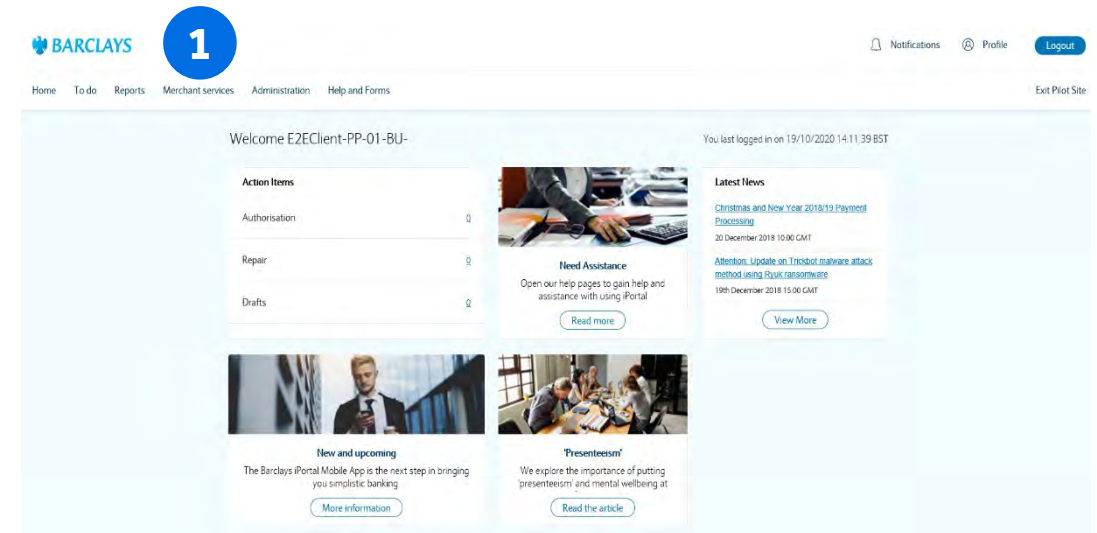
Looking at open chargebacks

If you've clicked on the 'open' button, you'll be able to see the case ID, merchant reference and chargeback amount for each open case.

To see a chargeback case in more detail
Click on the drop-down menu (5) on a particular case to see further transaction details, including:

- Reason it was raised

- Original transaction date

- Outlet number

- Card number

- Card issuer

- Documents uploaded by customer (click 'View issuer documents').

Open chargebacks

| Select chargeback status | ∨ |

Open chargebacks ? | 5
Expiring today ? | 0

Open chargebacks
Showing 1 - 5 of 5 chargebacks

Q Search chargebacks

Due by ∧	Case ID	Merchant reference	Chargeback amount ∧
> 02/11/2020	1017342-CB33	MERREF_TEST	88.47 GBP
> 02/11/2020	1017342-CB34	MERREF_TEST	34.88 GBP
> 02/11/2020	1017342-CB35	MERREF_TEST	151.1 GBP

5 | ∨ 02/11/2020 | 1017342-CB33 | MERREF_TEST | 88.47 GBP

Reason	Type	Original transaction value	Original transaction date
V75 - Transaction not recognised	1st Cbk	97.44 GBP	20/10/2020

Outlet number	Card number	Card issuer
1017342	123456******0000	TEST

Accept   Respond

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Accept a chargeback

To accept a chargeback, simply press the 'Accept' button (6).

Responding to chargebacks

To reply to a chargeback and upload supporting evidence, click the 'Respond' button (7).

Then, select 'Browse' to upload evidence.

Submitting evidence

You will see this notification if you've successfully submitted your evidence (8).

Or if your submission has been unsuccessful, you will see this notification (9).

8

✓

Evidence submitted

Your evidence has been submitted for review

Your summary

Here's a summary of the evidence submitted for this chargeback

Case ID	502RI30MAY05
Original transaction amount	243 SGD
Merchant reference	CURF0000478
Submission date	03/05/2019
Evidence submitted	001 – Lorem ipsum - .jpeg - 21.69kb 002 – Sit dolor - .jpeg - 100.32kb 003 – Carpe diem - .jpeg - 98.23kb

You can review all accepted chargebacks any time in the accepted chargebacks table.

Back to open chargebacks   View submitted chargebacks

9

(!)

Sorry, we could not upload your files

Please correct the issues below and upload the files again

Your summary

Here's a summary of your files and the errors found.

Case ID	502RI30MAY05
Original transaction amount	243 SGD
Merchant reference	CURF0000478
Evidence not submitted	001 – Lorem ipsum - .jpeg - 21.69kb 002 – Sit dolor - .jpeg - 100.32kb 003 – Carpe diem - .jpeg - 98.23kb

You can review all accepted chargebacks any time in the accepted chargebacks table.

Back to this case   View open chargebacks

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Evidence upload unsuccessful

If something goes wrong when uploading the evidence, you'll receive this error message (10).

If you receive this message, you can try to re-upload this evidence or you can submit the case with the partial evidence submitted instead (11).

(10) We couldn't upload some of your files due to errors
- File name 003 - Carpe diem - .jpeg is not a format we accept

Chargeback case

Case ID	502RI30MAY05
Original transaction amount	243 SGD
Merchant reference	CURF0000478

Evidence upload

Please upload the evidence you want to submit for this case.
Note: full PAN/card numbers should not be visible in any evidence.

Evidence ID	File name and type	File size
	No files uploaded	

Browse

Cancel   (11) Submit evidence

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Evidence upload unsuccessful (cont'd)

If you experience partial success when uploading evidence, you'll receive this error message (12). This means you successfully uploaded some evidence, but some evidence couldn't be uploaded.

You'll receive an Error Reason Code and Return Code, which explains why your evidence failed to upload (13).

Below are some examples of different error messages that you might receive if your evidence is partially uploaded:

ERR04 004 - File size exceeded 5 MB which is the maximum allowed size.

ERR006 - Document is encrypted

ERR07 - Failure due to embedded documents

ERR08 - Virus Found

ERR09 - Invalid Document Type

ERR30 – Creator Identifier is not recognised

ERR031- Uploaded document size is below the minimum allowed size (1kb)

ERR032 – Appropriateness Check Failed

ERR017 005 – Generic system error

.

12

⊘ Please send the following missing evidence

- ERR10: 003 - Carpe diem.jpeg may contain sensitive content
- ERR17: 004 - Carpe diem 02.jpeg has an unknown issue **13**

You'll need to email all missing evidence in **one single document** to: disputerresponses@barclays.com

Please ensure that you:

- include your full case ID in the document name and the subject line of the email
- use a compatible attachment type (.pdf, .tif, .tiff, .jpg, .jpeg, .doc, .docx)
- include all information within the attachment, not the body of the email

Note: The email address above is for **chargeback cases only**. Our chargeback support team are available on 0844 755 0094, Monday to Friday, 9am-5pm.

Submitted evidence summary

You successfully submitted the following evidence for this chargeback.

Case ID	502RI30MAY05
Original transaction amount	243 SGD
Merchant reference	CURF0000478
Submission date	03/05/2019
Evidence submitted	001 - Lorem ipsum - .jpeg - 21.69kb 002 - Sit dolor - .jpeg - 100.32kb

You can view your accepted chargebacks in the accepted chargebacks table.

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Exporting chargebacks

To see the list of chargebacks for a selected status, scroll to the bottom of the page.

Then, to export a report of your chargebacks to a .csv file:

1. Choose a chargeback list (open, submitted, expired, accepted)

2. Select your desired date range

3. Click on 'Export'.

×

Export chargebacks

To export chargebacks as a CSV file, select the date range and status required

Status

| All ⌄ |

Date from   Date to

| dd/mm/yyyy 🗓 | | dd/mm/yyyy 🗓 |

Export

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Any other queries

If you have any questions, we'd recommend that you visit the FAQs page.* If you can't find the answer to your question there, feel free to get in touch on 0800 161 5341

*Please note, the FAQs you see will differ based on the status of your chargebacks. This image shows the FAQs for open chargebacks.

Frequently asked questions

> Can I respond to a chargeback after the due date has passed?

> Why am I not able to find a chargeback when I search for it?
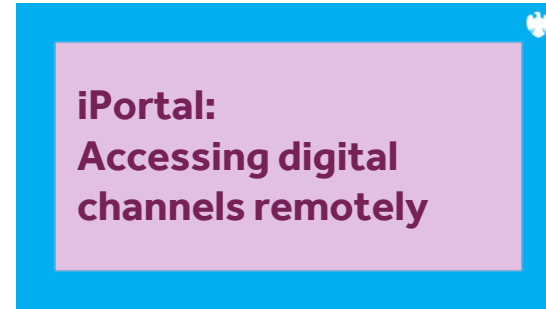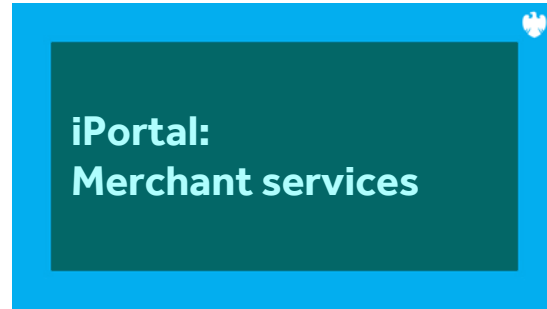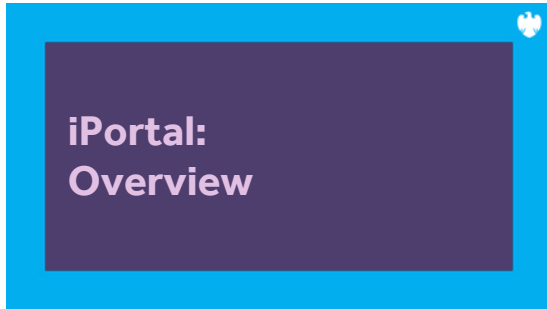
> Why can't I see open chargebacks older than 14 days?

Need more help?

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Video links

Video links (click to view)

iPortal:
Overview

iPortal:
Merchant services

iPortal:
Accessing digital
channels remotely

iPortal:
Software installation
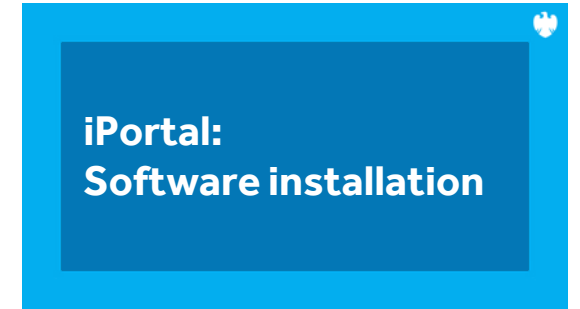
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Thank you

If you need any further support or guidance, then please get in touch with your Account Manager – or visit our website.

Click here