



Barclays iPortal: Merchant services guides

November 2023



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How to create new users for iPortal Merchant Services



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'.

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User List

You can select an existing client user to manage or click Add New User to add a new one.

Add New User

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

Sort

First Name a-z

Status

All

Search User

Search by Name, PURN, Status, Mobile...

14 Users listed

ABHISHEK KAUSHIK

INACTIVE NEW DEVICE

System Administrator (View, Input & Authorise),User

PURN 99000000183522000012

ROLE PROFILES 1


Adnan Khan

ACTIVE

System Administrator (View, Input & Authorise),User

PURN 99000000183522000003

ROLE PROFILES 1



Restricted - External

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.

1

2

3

DetailsRole ProfilesReview

New User : DetailsINACTIVE NEW DEVICE

You can create New User here.
To add New User please enter all mandatory details for the New User and click "Next" button.

* Required Fields

User Type

☒ User

☐ System Administrator

☒ View

☐ Authorise

☐ Input

System Administrator will have default viewer rights.

Personal Details

* Title

Select Title

* First Name

Middle Initial(s)

* Last Name

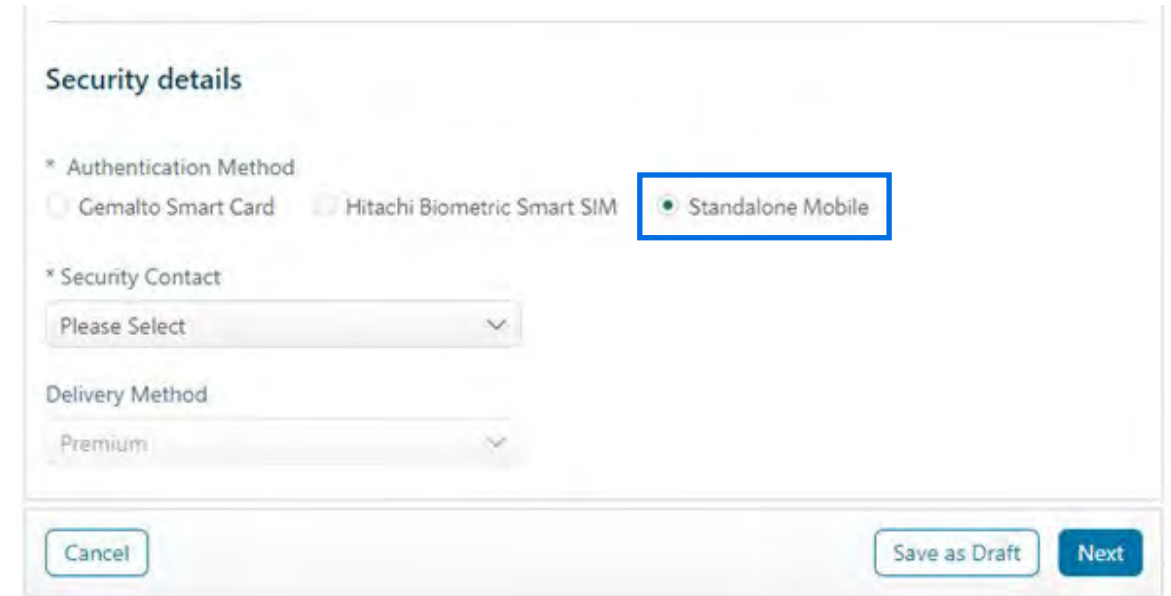
Address details:

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

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.

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1 2 3
Details Role Profiles Review

Assign Role Profiles to New user

You can assign Role Profiles to New user by turning the Toggle button on or off.

Filter Role Profile
All Roles

Search Role Profile
Search for Role Profile

6 Role Profiles listed

Barclaycard Merchant Services

1 Role Profile listed

[Default - Barclaycard Merchant Services](#)

This role provides access to Barclaycard Mercha... Barclaycard Merchant Services
Users Associated: 14

Fund Investments

Back Cancel Save as Draft Next

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

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.

The screenshot shows the 'iPortal BPS LCT Test Client' interface. On the left is a sidebar menu with options: 'View client', 'Users', 'Role profiles', 'Workflows', 'Device readers' (highlighted), 'Settings', 'Admin reports', 'Audit report', and 'Outstanding activity report'. The main content area is titled 'Order Device Readers' and includes a descriptive paragraph. Below this is a section for 'Required Fields' with three dropdown menus: 'Device Type' (set to 'Smart Card'), 'No Of Devices' (set to '1'), and 'Security Contact' (set to 'Select security contact'). There is also a 'Delivery Method' dropdown set to 'Premium'. At the bottom are 'Cancel' and 'Confirm' buttons.

iPortal BPS LCT Test Client

- [View client](#)
- [Users](#)
- [Role profiles](#)
- [Workflows](#)
- Device readers**
- [Settings](#)
- [Admin reports](#)
- [Audit report](#)
- [Outstanding activity report](#)

Order Device Readers

Please complete all required fields below to order your Security Device Reader(s). To check the types of Security Device Reader available, please refer to help. Please note there may be a charge for ordering additional devices. Please refer to your Relationship Team for more information.

* Required Fields

* Device Type
Smart Card

* No Of Devices
1
Please enter a value between 1 to 10.

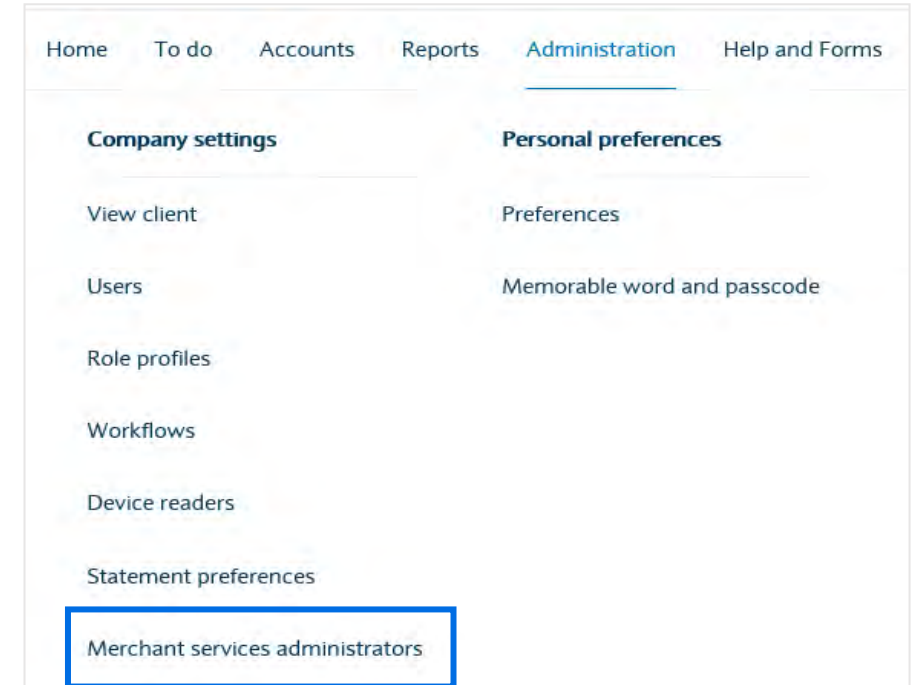
* Security Contact
Select security contact

* Delivery Method
Premium

[Cancel](#) [Confirm](#)

Assigning MIDs and services to your users

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



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	⋮

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.

Assign merchant IDs

Set up users

1

2

3

Assign access points

Assign services

Confirmation

User details

Name

Giselle Anthony

Email

giselle@expertsystems.co.uk

Assign merchant IDs

Which access points do you want this user to have access to?

0 Group(s) 0 Chain(s) 0 Outlet(s) selected

Q Search merchant IDs

MID	Name	Address	Chains	Outlets
0003251	Expert Systems Ltd	Northampton, NN4 7SG	4	662
> 123456	Expert Systems 1	Northampton, NN4 7SG		23
> 123457	Expert Systems 2	Northampton, NN4 7SG		622
> 123458	Expert Systems 3	Northampton, NN4 7SG		7
> 123459	Expert Systems 4	Northampton, NN4 7SG		10

Cancel

Assign merchant IDs

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

<input type="checkbox"/>	Merchant service	Description
<input type="checkbox"/>	Chargebacks	View and manage your chargebacks
<input type="checkbox"/>	Statements	View and download statements from the last 13 months
<input type="checkbox"/>	Statement Preferences	Opt to receive your statements electronically
<input type="checkbox"/>	Settlements	View settlement information from the last 28 days
<input type="checkbox"/>	Transactions	View and download transaction information

Cancel

Assign merchant services

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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Manage permissions

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'.

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View client

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User List

You can select an existing client user to manage or click Add New User to add a new one.

Add New User

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

Sort

First Name a-z

Status

All

Search User

Search by Name, PURN, Status, Mobile...

14 Users listed

ABHISHEK KAUSHIK	System Administrator (View, Input & Authorise),User	PURN 9900000018352200001	INACTIVE NEW DEVICE	<div><div>1</div><div>Activate New Device</div><div>Activate User</div><div>Amend User</div><div>Assign Role Profile</div><div>Delete User</div><div>Order Replacement Device</div><div>Suspend User</div><div>Manage Corporate Mobile App</div></div>
Adnan Khan	System Administrator (View, Input & Authorise),User	PURN 9900000018352200000		
Amrin O' Hafeji	System Administrator (View, Input & Authorise),User	PURN 9900000018352200000		
Harshad Kashiwale			ACTIVE	



Assigning Merchant Services to existing users



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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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 Services

Users Associated: 14

Assign Users

Fund Investments

Assigning a role to the profile (cont'd)

Switch on the user's profile for Merchant Services.

iPortal BPS LCT Test

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Outstanding activity report

1

2

Assign Users

Review

Assign Users

You can assign Users here.

To assign or unassign a User use the toggle switch for the Role Profile: Default - Barclaycard Merchant Services and go to next step.

Show: Assigned or unassigned users

Search Users:

All

Search by user name, status, PURN, i...

Assigned: 14 User(s)

14 Users listed

John Williamson

ACTIVE

User

PURN

99000000183522000004

Role Profiles

1

ON

Amrin O' Hafeji

ACTIVE

System Administrator (View, Input & Authorise),User

PURN

99000000183522000001

Role Profiles

1

ON

Matthew Thompson

ACTIVE

User

PURN

99000000183522000002

Role Profiles

1

ON

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'.

BARCLAYS

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Barclays.Net

Authorise

Repair

Draft

Admin

User

Authorise

Repair

Drafts

Search

<input checked="" type="checkbox"/>	USER ID	USER NAME	USER STATUS	PURN	USER TYPE	ROLE PROFILE NAME
<input checked="" type="checkbox"/>		fr ln	Inactive		System Administrat...	Existing Role: ; New R

1 of 1 selected

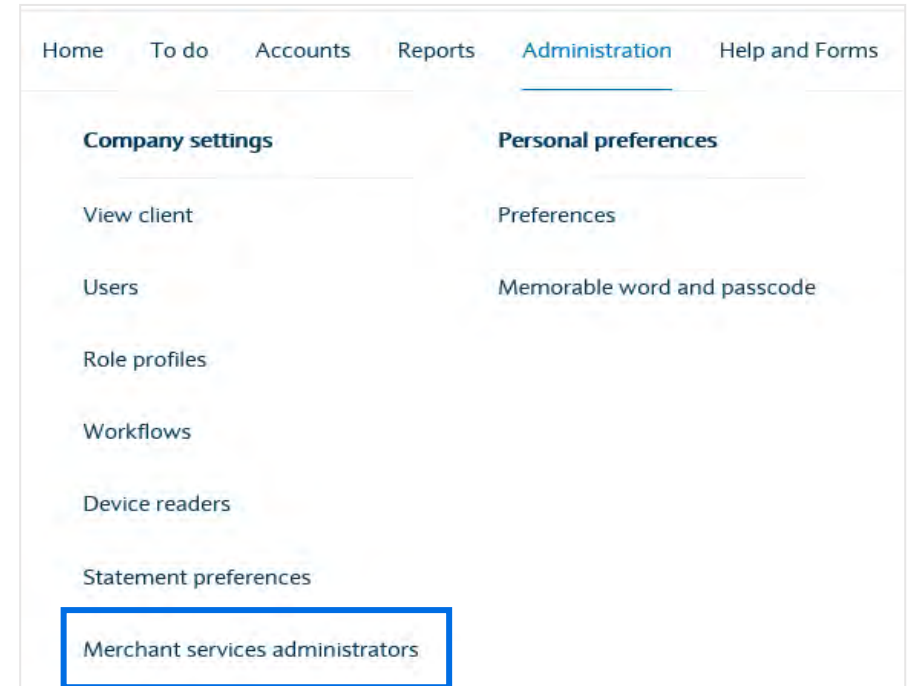
Send to Repair

Reject

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.



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'.

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	<div><div></div><div>Set up user</div></div>
KPuname	User	Pending	Pending	

Active users

Showing 1 - 10 of 27 users

Name	Role	
E2ECBNS TestBU	User	<div><div></div></div>

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.

Assign merchant IDs

Set up users

1

2

3

Assign access points

Assign services

Confirmation

User details

Name

Lavelle Anthony

Email

anth.l@expertsystems.co.uk

Assign merchant IDs

Which access points do you want this user to have access to?

0 Group(s) 0 Chain(s) 0 Outlet(s) selected

Search merchant IDs

MID	Name	Address	Chains	Outlets
< 0003251	Expert Systems Ltd	Northampton, NN4 7SG	4	662
> 123456	Expert Systems 1	Northampton, NN4 7SG		23
> 123457	Expert Systems 2	Northampton, NN4 7SG		622
> 123458	Expert Systems 3	Northampton, NN4 7SG		7
> 123459	Expert Systems 4	Northampton, NN4 7SG		10

Cancel

Assign merchant IDs

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

<input type="checkbox"/>	Merchant service	Description
<input type="checkbox"/>	Chargebacks	View and manage your chargebacks
<input type="checkbox"/>	Statements	View and download statements from the last 13 months
<input type="checkbox"/>	Statement Preferences	Opt to receive your statements electronically
<input type="checkbox"/>	Settlements	View settlement information from the last 28 days
<input type="checkbox"/>	Transactions	View and download transaction information

Cancel

Assign merchant services



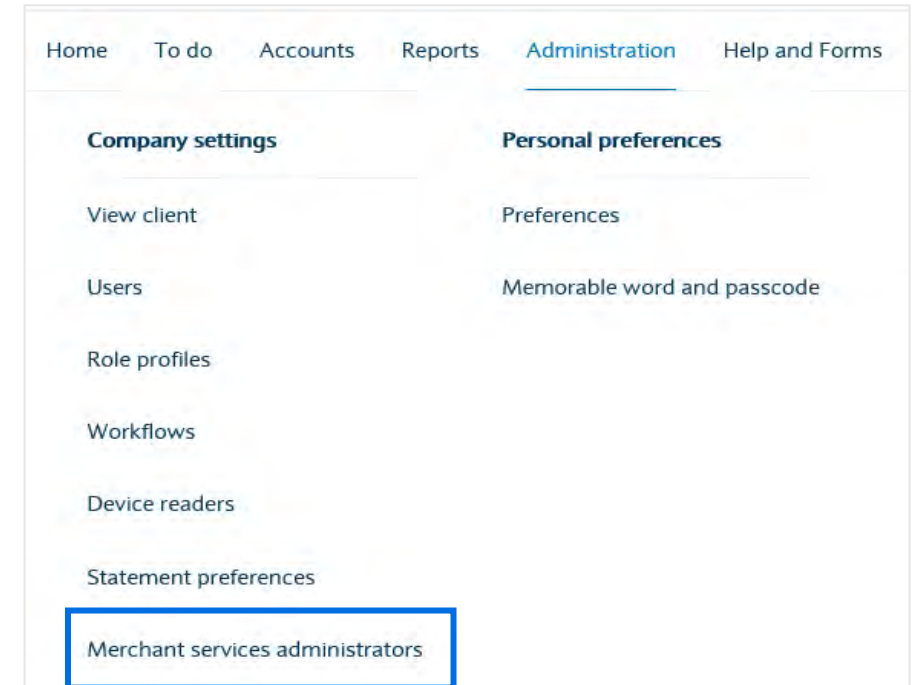
Amending a user's access



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.



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'.

Active users

Showing 1 - 10 of 11 users

Name	Role
ABHISHEK KAUSHIK	Admin
Adnan Khan	Admin, User
Amrin O' Hafeji	Admin, User
John Williamson	User



- [View hierarchies](#)
- [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

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.

Amend hierarchies

Manage users

User details

Name

Nicholas Capper

Email

nicholas.capper@barclays.com

Assign hierarchies

Select the hierarchies this user should have access to.

1 group(s) | 1 chain(s) | 2 outlet(s) selected

Open quick add

<input checked="" type="checkbox"/>	MID	Name	Address	Type	
<input checked="" type="checkbox"/>	< 1303350	Iportal LCT 2	1234 PAVILLION DRIVE, NN4 7SG	Group	1 chain, 2 outlets
<input checked="" type="checkbox"/>	> 1160406	Iportal LCT 2	56/8 BARCLAYS DRIVE, NN4 7SG	Chain	2 outlets

Cancel

Amend hierarchies



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'.

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User List

You can select an existing client user to manage or click Add New User to add a new one.

Add New User

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

Sort

Status

Search User

First Name a-z

All

Search by Name, PURN, Status, Mobile...

14 Users listed

ABHISHEK KAUSHIK	System Administrator (View, Input & Authorise), User	PURN 9900000018352200001	INACTIVE NEW DEVICE
Adnan Khan	System Administrator (View, Input & Authorise), User	PURN 9900000018352200000	ROLE PROFILES
Amrin O' Hafeji	System Administrator (View, Input & Authorise), User	PURN 9900000018352200000	Activate New Device
Harshad Kashiwale	System Administrator (View, Input & Authorise), User	PURN 9900000018352200000	ACTIVE



Updating your memorable word and passcode



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'.

The screenshot displays the Barclays iPortal user interface. In the top-right corner, the 'Profile' tab is highlighted with a blue box. Below it, the 'Preferences' section is visible, with the 'Memorable word and passcode' option also highlighted by a blue box. The main content area shows a welcome message for 'Nicholas Capper' and a table of 'Action Items' with columns for the item name and a count. The table lists 'Authorisation' (1), 'Repair' (0), and 'Draft' (0). Below the table, there are four promotional cards: 'Video training and support', 'Help us to help protect you', 'Building brands better', and 'Latest enhancements to Barclays iPortal'. Each card includes a brief description and a 'Read more' or 'Watch the videos' button. The right sidebar shows user details like 'Client Name' (iPortal BPS LCT Test Client) and 'Client ID' (IPORTA6538).

Messages Notifications Profile

Preferences

Memorable word and passcode

Manage my mobile devices

Welcome Nicholas Capper

You last

Client Name
iPortal BPS LCT Test Client

Lates
Client ID
IPORTA6538
17 March 2022 08:00 GMT

Latest enhancements to Barclays iPortal
03 March 2022 14:30 GMT

View More

Action Items	
Authorisation	1
Repair	0
Draft	0

Video training and support
Open the video site to access support and information videos.
Watch the videos

Help us to help protect you
Understanding the importance of our security checks.
Read more

Building brands better
Discover key trends and opportunities in a new era for marketing services.
Read our report

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

* Enter Memorable Word

?

* Re-Enter Memorable Word

* Enter Passcode

?

* Re-Enter Passcode

Cancel

Submit



Ordering a card reader/smart card



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.

The screenshot shows the 'iPortal BPS LCT Test Client' interface. On the left is a navigation menu with options: 'View client', 'Users', 'Role profiles', 'Workflows', 'Device readers' (highlighted), 'Settings', 'Admin reports', 'Audit report', and 'Outstanding activity report'. The main area is titled 'Order Device Readers' and contains the following fields:

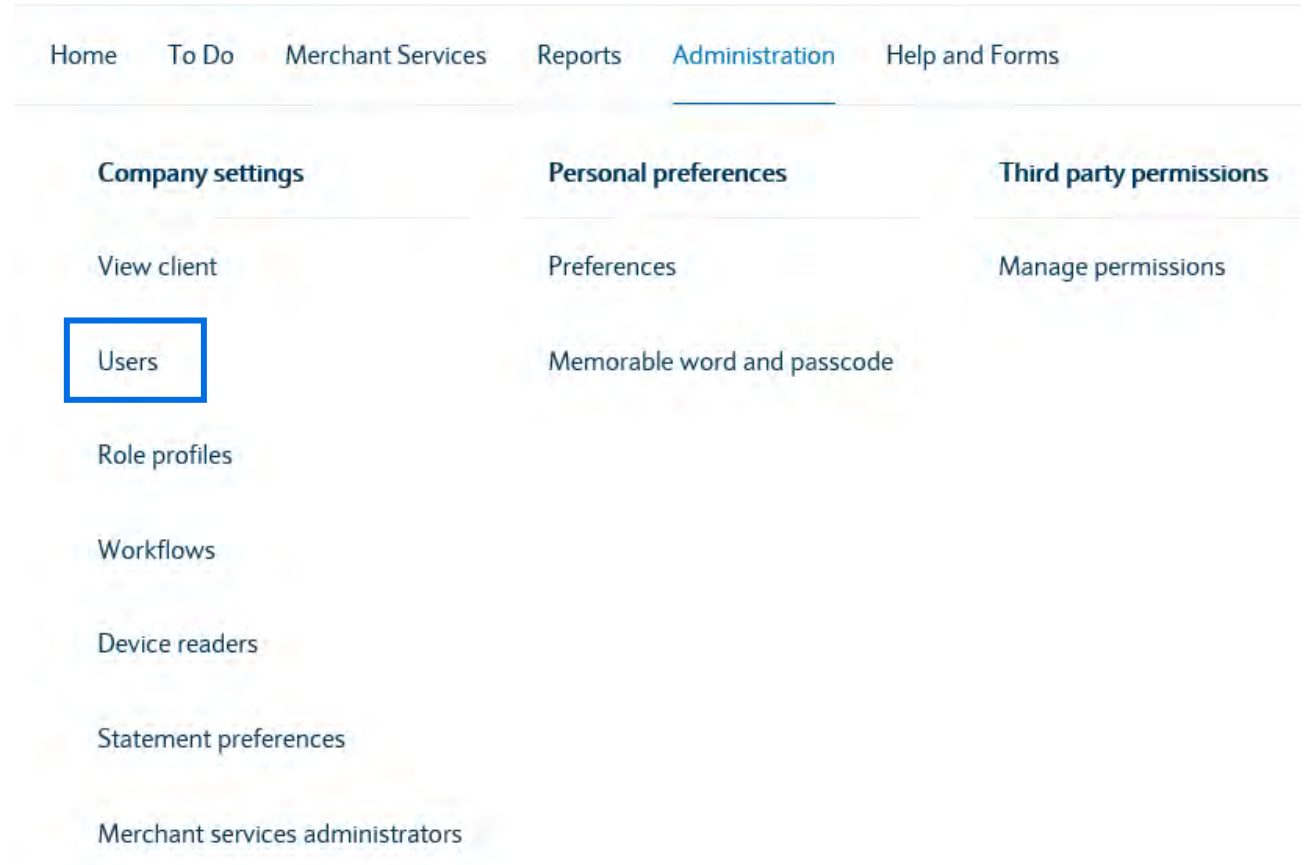
- * Device Type:** A dropdown menu with 'Smart Card' selected. This field is highlighted with a blue border in the original image.
- * No Of Devices:** A text input field containing the number '1'. Below it is a note: 'Please enter a value between 1 to 10.'
- * Security Contact:** A dropdown menu with 'Select security contact' selected.
- * Delivery Method:** A dropdown menu with 'Premium' selected.

At the bottom of the form are two buttons: 'Cancel' and 'Confirm'.

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.



The screenshot shows the Barclays iPortal interface. At the top, there is a navigation bar with tabs: Home, To Do, Merchant Services, Reports, Administration (highlighted with a blue underline), and Help and Forms. Below the navigation bar, there are three main sections: Company settings, Personal preferences, and Third party permissions. Under Company settings, there is a list of options: View client, Users (highlighted with a blue box), Role profiles, Workflows, Device readers, Statement preferences, and Merchant services administrators. Under Personal preferences, there are two options: Preferences and Memorable word and passcode. Under Third party permissions, there is one option: Manage permissions.

Company settings	Personal preferences	Third party permissions
View client	Preferences	Manage permissions
Users	Memorable word and passcode	
Role profiles		
Workflows		
Device readers		
Statement preferences		
Merchant services administrators		

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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Audit report

Outstanding activity report

User List

You can select an existing client user to manage or click Add New User to add a new one.

Add New User

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

Sort

First Name a-z

Status

All

Search User

Search by Name, PURN, Status, Mobile...

14 Users listed

ABHISHEK KAUSHIK	INACTIVE NEW DEVICE	
System Administrator (View, Input & Authorise),User	PURN 9900000018352200001	<div><div>ROLE PROFILES</div><div>Activate New Device</div><div>Activate User</div><div>Amend User</div><div>Assign Role Profile</div><div>Delete User</div><div>Order Replacement Device</div><div>Suspend User</div><div>Manage Corporate Mobile App</div></div>
Adnan Khan		
System Administrator (View, Input & Authorise),User	PURN 9900000018352200000	
Amrin O' Hafeji		
System Administrator (View, Input & Authorise),User	PURN 9900000018352200000	
Harshad Kashiwale		
		ACTIVE

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'.

iPortal BPS LCT Test Client

View client

Users

Role profiles

Workflows

Device readers

Settings

Admin reports

Audit report

Outstanding activity report

User List

You can select an existing client user to manage or click Add New User to add a new one.

Add New User

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

Sort

First Name a-z

Status

All

Search User

Search by Name, PURN, Status, Mobile...

14 Users listed

ABHISHEK KAUSHIK	System Administrator (View, Input & Authorise),User	PURN 9900000018352200001	INACTIVE NEW DEVICE	<div><div>1</div><div><div>Activate New Device</div><div>Activate User</div><div>Amend User</div><div>Assign Role Profile</div><div>Delete User</div><div>Order Replacement Device</div><div>Suspend User</div><div>Manage Corporate Mobile App</div></div></div>
Adnan Khan	System Administrator (View, Input & Authorise),User	PURN 9900000018352200000		
Amrin O' Hafeji	System Administrator (View, Input & Authorise),User	PURN 9900000018352200000		
Harshad Kashiwale			ACTIVE	

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



How to manage your chargebacks



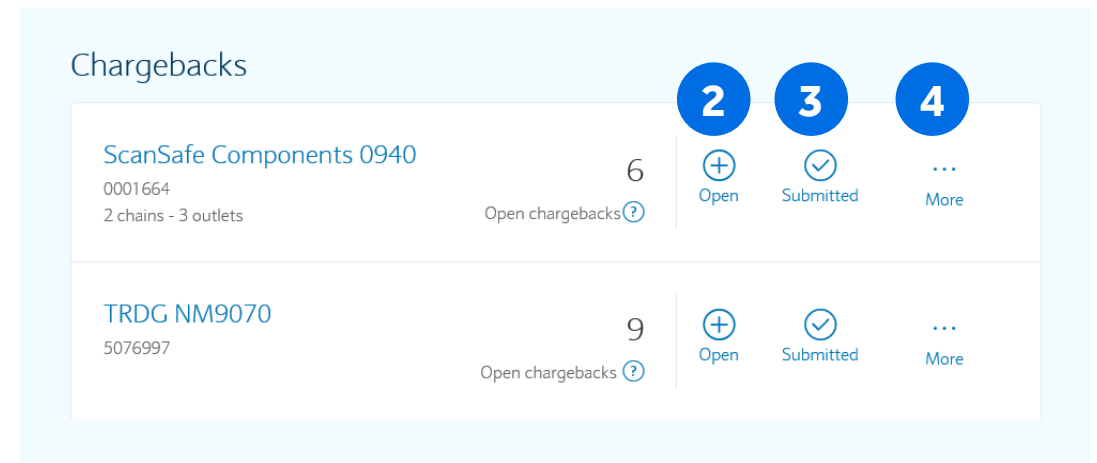
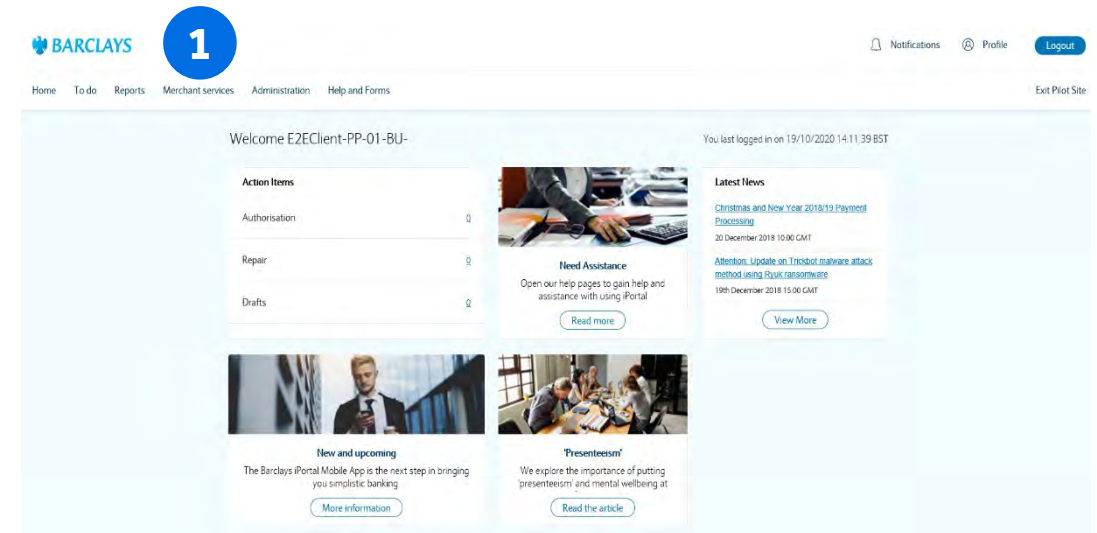
Looking at the chargeback dashboard

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

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

Accept a chargeback

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

▼ 02/11/2020

1017342-CB33

MERREF_TEST

88.47 GBP

Reason

V75 - Transaction not recognised

Type

1st Cbk

Original transaction value

97.44 GBP

Original transaction date

20/10/2020

Outlet number

1017342

Card number

123456*****0000

Card issuer

TEST

6

Accept

Respond

✓

Accepted

This chargeback has been accepted.

Your summary

Here's a summary of the accepted chargeback

Case ID

1017342-CB35

Original transaction amount

88.59 GBP

Merchant reference

MERREF_TEST

Accepted date

21/10/2020

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

Back to open chargebacks

View accepted chargebacks

Responding to chargebacks

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

Then, select 'Browse' to upload evidence.

▼

02/11/2020

1017342-CB33

MERREF_TEST

88.47 GBP

Reason

V75 - Transaction not recognised

Type

1st Cbk

Original transaction value

97.44 GBP

Original transaction date

20/10/2020

Outlet number

1017342

Card number

123456*****0000

Card issuer

TEST

Accept

Respond

Chargeback case

Case ID

1017342-CB33

Original transaction amount

88.59 GBP

Merchant reference

MERREF_TEST

Evidence upload

Please upload any evidence you want to submit regarding this case

Note: full PAN/card numbers should not be visible

Evidence ID

File name

File size

No files uploaded

Browse

Submit evidence

Cancel

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 SCD
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 SCD
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

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).



We couldn't upload some of your files due to errors

10

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.

<input type="checkbox"/>	Evidence ID	File name and type	File size
No files uploaded			

Browse

Cancel

11

Submit evidence

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

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

13

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

dd/mm/yyyy

Date to

dd/mm/yyyy

Export

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?](#)

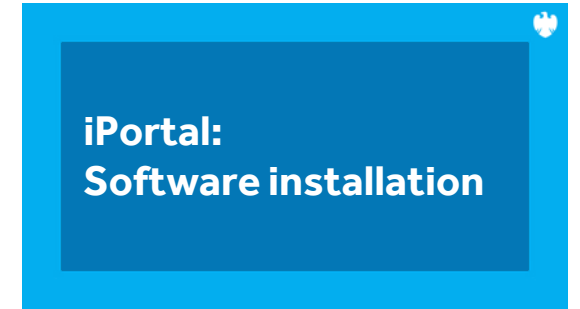
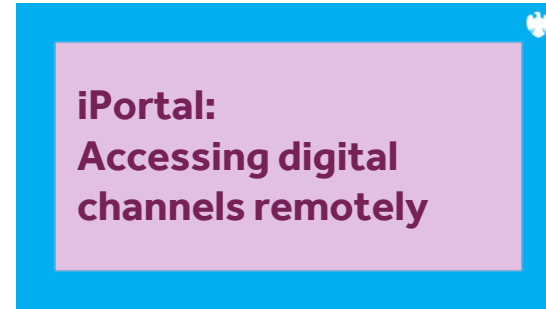
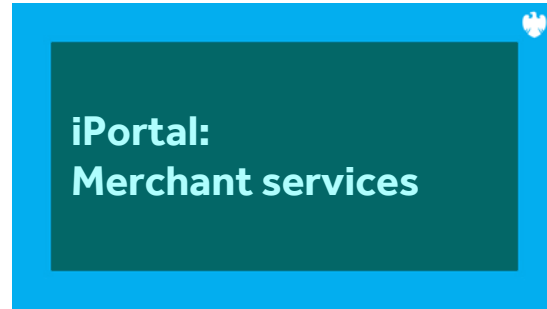
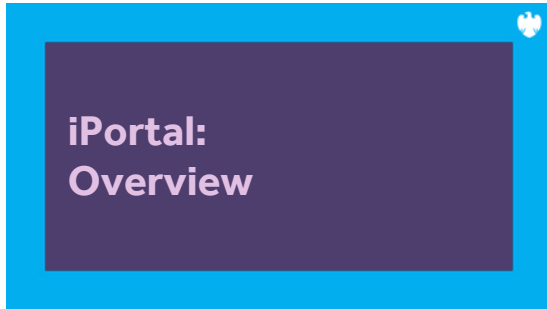
[Need more help?](#)



Video links



Video links (click to view)





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](#)

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