

# Sage Payment Solutions Online Reporting

## Quick Reference Guide

Version 1.0

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## Foreword

The *Sage Payment Solutions Online Reporting (Sage) Quick Reference Guide (QRG)* is designed to provide Sage “My Virtual Reports” users with brief instructions on some of the basic features and functions of the Sage Online Reporting Web application.

We welcome your feedback and/or suggestions at [virtualreporting@sagepayments.com](mailto:virtualreporting@sagepayments.com).

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## 2. About Sage “My Virtual Reports”

[Myvirtualreports.com](http://myvirtualreports.com) provides fast, convenient transaction information for Retail, MO/TO, and Internet businesses.

## 3. Sage Online Reporting Benefits & Features

Sage Online Reporting is a timesaving, convenient and secure service that allows you to better manage your business by delivering invaluable, daily accounting information directly to you.

- Provides one consistent, easy-to-learn and easy-to-use place to view and manage your transactions.
- Reconcile processed transactions against funds deposited in your bank account every day.
- Search for and find a specific transaction by date, card or auth number, or amount.
- Export reports to Excel, Word, HTML, XML or email format.
- View entire batch detail or specific cardholder and/or transaction detail, including card and process type, AVS, and much more.
- See chargebacks and retrievals posted to your account as they occur.
- Manage cash flow more reliably with daily-recorded deposits.
- Perform sales and trend analyses by viewing past monthly statements all in one place.
- Get transaction details for virtual checks and ACH transactions as well.

We are pleased to announce that effective October 1, 2005, additional benefits and features have been added.

- Enhanced Reporting and Export Options.
- Transaction Data for EFT and Virtual Check products.
- AdvanceMe account information.
- Actual Monthly Statements.

## 4. Access Sage MyVirtualReports.com

Via your Internet explorer browser, navigate to <http://www.myvirtualreports.com>.

Alternatively, select the “**Online Reporting**” link on our website at <http://www.sagepayments.com>.

## 5. New Users -- Login to Sage Online Reporting

For more information, refer to the *Online Reports Demo* at <http://www.sagepayments.com/Demo/onlinereporting/>.

1. In your Internet browser’s Address box, type: <http://www.myvirtualreports.com>.
2. In the “Welcome to Virtual Reports” box, select the “**merchant login**” link.  
The Merchant Login dialog box opens.
3. If you are a first time user, click on the “**New User Registration**” box. *(If you are an already registered Virtual Reports user, skip to Section 5 below.)*
4. In the “**Your Merchant ID**” box, type your Merchant ID (MID) (provided in your Welcome Letter).
5. In the “**Your Bank Account Number**” box, type the bank account number used to set up your merchant processing account.
6. In the “**Security Code**” box, type security code text displayed in the image on the screen.
7. Click on the “**Continue**” box to complete your registration.

## 6. Registered Users -- Login to Sage Online Reporting

For more information, refer to the *Online Reports Demo* at <http://www.sagepayments.com/Demo/onlinereporting/>.

1. In your Internet browser’s Address box, type: <http://www.myvirtualreports.com>.
2. In the “Welcome to Virtual Reports” box, select the “**merchant login**” link.  
The Merchant Login dialog box opens.
3. If you are a registered user, type your Merchant ID (MID) in the “**Your Merchant ID**” box. *(If you are a new Virtual Reports user, see Section 4 above.)*  
Note: Your MID was provided in your Welcome Letter.
5. In the “**Merchant Username**” box, type your Virtual Reports user name.
6. In the “**Merchant Password**” box, type your Virtual Reports password.
6. In the “**Security Code**” box, type security code text displayed in the image on the screen.
7. Click on the “**Login**” box to access your Virtual Reports account.

## 7. Change Your Password

1. From the Menu Bar in MyVirtualReports, select the **System** menu > **Password Change** menu command.  
The Password Change View opens.
2. In the “**New Password**” box, type your new password.
  - Minimum 8 characters, maximum 12 characters, case-sensitive.
  - Must contain at least 1 numeric character and 1 alpha character.
  - Previous 4 passwords may not be used.
  - 3 consecutive failed login attempts will result in your account being locked.

Contact Technical Support at **1-877-841-7014** if assistance is needed.
3. In the “**Confirm New Password**” box, retype your new password.
4. In the “**Email Address**” box, type your email address.
5. Click on the “**Change Password**” box to activate your new password.

## 8. Virtual Reports Main Menu Options

### 8.1. Merchant Select (Main Menu Option)

The **Merchant Select** menu option allows you to select the merchant site for which you would like to view data. Here you can also see specific information about your account, such as:

- **MCC #** *[This is the SIC code which identifies merchant's type of business with Visa & MC]*
- **Store #** *[This represents the first 4 digits of your MID]*
- **BIN #** *[This identifies the acquiring bank or independent sales organization]*
- **Chain #** *[This is the id # assigned to each merchant, in the event that a merchant has multiple locations that need to be chained together for reporting purposes.]*
- Terminal ID/Equipment information

### 8.2. Credit Card (Main Menu Option)

By selecting the **Credit Card** menu option, you can do any of the following:

1. See **Credit Card Monthly Summary** transaction details, such as:
  - Sales Count
  - Sales Volume
  - Credit Count
  - Credit Volume
  - Average Ticket
2. See **Credit Card Daily Batch Summary** reports for date ranges that you choose.
3. Conduct **Credit Card Transaction Searches** on specific **card numbers, auth numbers, and/or transaction amounts**.
4. Pull reports on **Credit Card Returns/Credits Details** for date ranges that you choose.
5. View a current or historical copy of your monthly **Credit Card Statement** and/or download a .PDF copy for your records.
6. Get the information you need to effectively manage and resolve chargebacks and retrievals by generating detailed reports under **Credit Card Chargeback and Retrieval Reporting**.
7. See **ACH Details** data for **Credit Card Settlement and Funding** for any given date range.
8. View **Credit Card Authorization** details for date ranges that you choose.

### 8.3. EFT (Main Menu Option)

By selecting the **EFT** menu option, you can do any of the following:

1. See **EFT Monthly Summary** reports for date ranges that you choose.
2. See **EFT Daily Summary** reports for date ranges that you choose.
3. Query **EFT Disbursement Report** data for date ranges that you choose.
4. Conduct **EFT Transaction Searches** on specific **customer names, auth customer id's, originator id's, account #s, routing/transit #s, transaction amounts** and/or **transaction types**.
5. View **EFT Reject** information for the date ranges that you choose.
6. View a current or historical copy of your **EFT Monthly Statement** and/or download a .PDF copy for your records.

### 8.4. AdvanceMe (Main Menu Option)

By selecting the **AdvanceMe** menu option, you can view a summary of your AdvanceMe account, including information on:

- Date Processed
- Volumes
- Adjustments
- Percentages Withheld
- AdvanceMe Inc. (AMI) Balances

### 8.5. Reporting (Main Menu Option)

By selecting the **Reporting** menu option, you can:

1. Use the **Report Generator** to create and save custom reports where you select criteria and fields that are important to you, such as:
  - Batch Number
  - Card Number
  - Card Type
  - POS Entry Mode
  - Terminal ID
  - Transaction Code
  - Card Expiration Date
  - Transaction Time
2. Under the **Report Library**, benefit from the ability to set up report **Export Schedules** and **Formats** for the reports you most use.

### 8.6. System (Main Menu Option)

By selecting the **System** menu option, you can:

- Get **Help Desk** information
- Generate a **Password Change** (see details under **Section 6: Change Your Password**)
- **Exit** to **Logoff** the Online Reporting system

## 9. Sage Payment Solutions Support

Support is available by telephone, facsimile, and e-mail between 9:00 a.m. and 5:00 p.m. Eastern Time, Monday through Friday.

### 9.1. Customer/Account Support

Voice	1-800-261-0240, Option 3, 3
FAX	703-848-1772
e-mail	<a href="mailto:clientservicessupport@sagepayments.com">clientservicessupport@sagepayments.com</a>

### 9.2. Customer/Billing Support

Voice	1-800-261-0240, Option 3, 3
FAX	703-848-1772
e-mail	<a href="mailto:financialsupport@sagepayments.com">financialsupport@sagepayments.com</a>

### 9.3. Virtual Terminal Technical Support

Voice	1-800-261-0240, Option 3, 5
FAX	703-848-1772
e-mail	<a href="mailto:virtualreporting@sagepayments.com">virtualreporting@sagepayments.com</a>

### 9.4. Physical Terminal Technical Support

Voice	1-800-261-0240, Option 3, 1
FAX	703-848-1772
e-mail	<a href="mailto:physicalsupport@sagepayments.com">physicalsupport@sagepayments.com</a>

### 9.5. Sales Support

Voice	1-800-261-0240, Option 3, 2
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