

TouchNet Reporting



TouchNet Reporting



The following are the

various reports available

in Marketplace:

By Product

By User Roles

By Revenue



They are helpful in reconciling the transactions made in the TouchNet Ready partner system



All reports can export in CSV format.

Report: By User Roles

- This report shows a list of all assigned user roles for this uPay site—uPay site managers, payment clerk, and site accountants.
- The report is initially sorted by Role
 Name (the far-left column); however,
 you can select the arrows in the column
 headers to choose a different sorting
 method.



TouchNet Reporting

By Product



All payments made for a TouchNet Ready Partner system will have the same product name.



This report is equivalent to the Revenue report. Will show individual product **Detail Codes**.

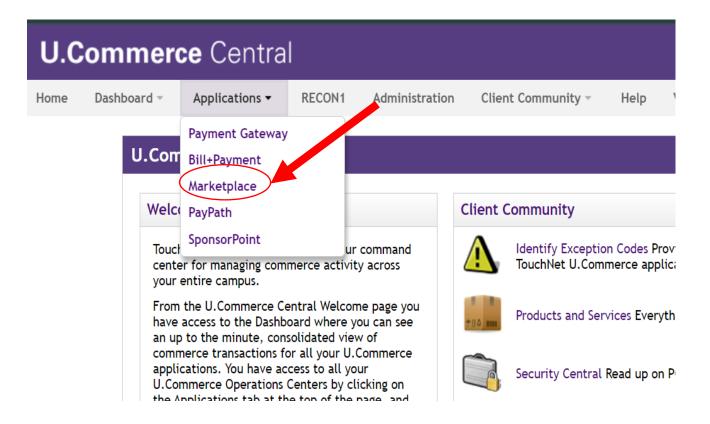
By Revenue

- Used to pull all payments received in a specific date range.
- Note: Recurring payments appear as revenue on the day the payments are processed. For example, if a recurring payment is set for December 1, the payment will be displayed as revenue on December 1. Enter the date range, determine the number of rows you want to show on each page, and click View.



Log into TouchNet

 Once you are in the TouchNet system, proceed to Marketplace.





TouchNet Reports

- Under Marketplace Reports, navigate to your respective store/ site. (NB. if you have more than one, select the intended option).
- Once the store/site is identified, <u>select</u> the type of report you wish to pull, i.e. Revenue, By Product, User Roles, etc.

- Marketplace ReportsMarketplace
 - Merchants
 - Stores
 - uPay Sites

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Revenue

Revenue By Payment Type

By Product

Recurring Payment

Posting Status

Posted Parameters

User Roles

Transaction Details



Select Report Parameters

- Identify the **To** and **From** date range for the report.
- Click View to pull the data.
- You will elect whether to get information on one or more features by either clicking the hyper link, or clicking the selection box, followed by View Multiple Product Detail Report if you wish to see more than one report items.

