



# TouchNet Reporting

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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.



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## 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**.

The screenshot shows the U.Commerce Central web interface. At the top, there is a purple header with the text "U.Commerce Central". Below this is a navigation bar with several tabs: "Home", "Dashboard", "Applications", "RECON1", "Administration", "Client Community", and "Help". The "Applications" tab is currently selected, and a dropdown menu is open below it. This menu contains the following items: "Payment Gateway", "Bill+Payment", "Marketplace", "PayPath", and "SponsorPoint". The "Marketplace" item is circled in red, and a red arrow points to it from the right. Below the navigation bar, the main content area is partially visible, showing a "Welcome" message and a "Client Community" section with three items: "Identify Exception Codes Prov", "Products and Services Everyth", and "Security Central Read up on P".



# 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, select the type of report you wish to pull, i.e. **Revenue, By Product, User Roles**, etc.

▼ **Marketplace Reports**

- ▶ Marketplace
- ▶ Merchants
- ▶ Stores
- ▶ uPay Sites

▼ **Campus CE**

- 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.

Export To CSV

From: 5/1/24, 12:00 AM To: 5/31/24, 11:59 PM View

Application Type:

- uPay
- uPay Mobile
- uPay Point of Sale

View Multiple Product Detail Report

<input type="checkbox"/>	Product Name	Number of Transactions
<input type="checkbox"/>	Campus CE	2
	Total:	2