

How to export a report

You can generated and export order / transaction reports in the Reporting section of Verifone Central.

- 1. Select the needed view between orders and transactions, by clicking on the toggle button Orders / Transactions.
- 2. After applying filters to display the results you want to export, as per the <u>Reporting Filters</u> documentation, click on **Export CSV** to generate either an order or a transaction report for download.

| Orders/Transactions | | | | | | | Sched | Schedule Export CSV V | | |
|--|----------------------------------|--------------------|-------------------|------------------------|--------------|--------------|-------|-----------------------|----------------------|--|
| Transaction ID | ✓ Type a Transact | ion ID | | | | | | | Search | |
| Created: 6/20/2024 - Total: 11,927 orders | - 6/27/2024 V Orders Transact | Organizations V Me | rchant ID 🗸 Add t | filter + Clear filters | | | | | | |
| Created A | Reference | Merchant Reference | Organization | Product | Orig. amount | Curr. amount | Туре | State | Related Transactions | |
| 6/27/2024, 15:13:58 | 587332680940 | 5 | Android_CST | Visa | 5.00 GBP | 5.00 GBP | Sale | Authorized | 1 | |
| 6/27/2024, 15:13:22 | 642199924517 | - | Android_CST | Visa | 5.00 GBP | 5.00 GBP | Sale | Authorized | 1 | |

- 3. Select the report type.
 - Basic report will contain the same columns as the transaction table in Verifone Central.
 - Full report will export all transaction details which are available for export.
 - **Customized report** you or another user in your organization has created. You can customize your own report template by clicking on **Manage templates**. For more information on how to customize your reports, see <u>Customize a report template</u>.

The sequence of the columns in the CSV report may experience changes in the long term, so that any possible automations on the merchant side should rely on the column names only and not on the order/sequence of the columns.

- 4. Depending on the number of transactions displayed in the search results, different screens will be displayed.
 - If there are less than 10.000 transactions, click the Export button to generate the report.

| Orders/Transactions | Schedule Export CSV |
|---|---|
| Transaction ID V Type a Transaction ID | Export CSV Report Template Fields |
| Created: 6/28/2024 V Organizations V Merchant ID V Add filter + | Report Template |
| Total: 694 transactions Orders Transactions | Cancel Export EX Manage templates Cancel Export |
| Created A Reference Merchant Reference Organization Produ | uct |

• If there are more than 10.000 transactions, click the Generate report button to generate a report ID.



| Schedule Export CSV ^ | Schedule Export CSV |
|---|---|
| Export CSV Report Template Fields ~ | Export CSV Report Template Fields V |
| (i) Your data set is too large for instant CSV download. You can generate the report as is and download it later from the 'Generated reports' page. We will notify you by email when it's ready for download. | (i) Your data set is too large for instant CSV download. You can generate the report as is and download it later from the 'Generated reports' page. We will notify you by email when it's ready for download. |
| Report Template | Report Template |
| Transaction report - Basic (new) | Transaction report - Basic (new) |
| Generate report | Report ID 0609abcb-674b-4605-a885-7048ccb37d1a |
| C Manage templates | C Manage templates |

- If the report contains 500,000 records or more, then the report will not be generated. A transaction line in a transaction report will contain the initial and the follow-up transaction as well. This is why the transaction counter may differ from the actual number of transaction included in the CSV report. If the transaction counter exceeds 500,000 then a message will be displayed in the Export CSV pop-up menu, informing you that the report cannot be exported. If the counter does not exceed 500,000 and actual number of transactions recorded in the exported CSV report does exceed that limit, an e-mail will be sent automatically to inform you that the report was not generated due to the limit breach.
- 5. Whenever a new report is generated, you will receive an email containing a link to download your report.

New custom report available



Dear Customer,

A new custom report is available. Please log into Verifone Central to download the file: <u>custom report_2023-06-19T00_00</u>.

This is an automated mail to which it is not possible to respond.

Kind regards,

Verifone Central



Alternatively, you can navigate to *Commerce* > *Reporting* and select <u>Generated reports</u>. In the *Generated reports* list, insert the report ID in the *Search* field and click on **Download**.

| Generated reports | | | | | | | | | |
|-------------------|---|------------|--------------------------------|---------------|----|-------------|-------------|-------------------|--|
| Report ID | Report ID v 224ca3a0-1d1b-45ad- | | | | | | | | |
| Created | : 11/12/2024 — 18/ | /12/2024 🗸 | Drganizations V Report types V | Clear filters | | | | | |
| Total: 1 repo | orts | | | | | | | | |
| | Generated O | n 📤 | Report Name | | O | rganization | | | |
| 0 | 18/12/2024, 1 | 2:19:00 | custom report_2023-06-19T | 00_00_ | Pa | arent | Download | | |
| Results per | page 10 ^ | • | | | | Go to page | Page 1 of 1 | $\langle \rangle$ | |

For definitions on all transaction detail fields displayed in the report, see Reporting details.