# Accessing and using ClientLine

ClientLine allows you to view detailed card transaction data and makes it easy to generate reports. It provides valuable insight into your business and customer behaviour.

This guide shows you how to access ClientLine and explains how to use some of its most popular features.

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## How to enrol in ClientLine

**Before you begin, have the following on hand:**

- **Your merchant account number.** If you have more than one location, ensure it's your chain or corporate merchant number.

- **Your bank details** for the account to which your funding is made.

**Step 1:** Go to www.MyClientLine.net

**Step 2:** Click the 'Enrol' button under 'Create an Account' on the ClientLine homepage.

**Step 3:** Select 'Begin Enrolment' and complete the information required on the page that follows. When entering your sort code, do not include the hyphens.

**Step 4:** Read and accept the terms and conditions by clicking on 'I agree' in the bottom left-hand corner. Then click 'Next' to continue.

**Step 5:** Select 'ClientLine Reporting' and click 'Next' to continue.

**Step 6:** Your user ID and temporary password will be provided on the screen if:

- You're requesting access at 'location' (also known as 'single outlet') or 'corporate' level (also known as 'chain').

- The information you've provided matches that on the Lloyds Bank Cardnet system.

Note this information down, click on 'log in' and follow the instructions.

If some of the data is incorrect, or you're requesting access at a higher level than 'location' or 'corporate', you'll be advised that your request has been sent to Lloyds Bank Cardnet for approval.

Once approved, we'll send an email to the address provided containing your ClientLine login details.

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## How to log into ClientLine

**Step 1:** Go to [www.MyClientLine.net](www.MyClientLine.net)

**Step 2:** Click the 'Merchant Login' button, and then enter your user ID and password.

**Step 3:** Click the 'ClientLine Report' link from the Business Track portal dashboard. This will open ClientLine in a separate window.

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## View your weekly overview

ClientLine automatically opens into the weekly overview, which reflects your merchant account set-up and defaults to the highest level available. Here you can view details of your submitted transactions, card usage, batch summary and bank deposit summary.

**View data for an individual location**
If you want to view an individual location, enter the merchant number in the 'Hierarchy ID' box, together with the Hierarchy Level. Then click 'OK'.

Use the look-up icon to search for a merchant location by using the DBA or trade name.

**Select a date range**
The weekly overview provides a snapshot view of the last seven-day period. You can change this to any seven-day period within the last 25 months.

**Get more detailed information**
Access more information by drilling into any items underlined in red. You can display and export the information in data view or chart view.

**View disputes**
Click on the 'Disputes' tab to view information on chargebacks and retrievals received during the last six months.

**Get more help with ClientLiine**
Click on the help button in the top right corner for a comprehensive user guide for ClientLine.

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## Create a report

The 'Create a Report' page allows you to create, preview, run and schedule a larger variety of reports, covering sales and funding, disputes, rate analysis and authorisations.

**Step 1: Go to the 'Create a Report' page**

→ Select 'Create a Report' under the 'Reports' tab in the top navigation.

**Step 2: Choose a report category**

→ In the 'Report Category' section, choose from the following options: 'Sales and Funding', 'Disputes', 'Rate Analysis' and 'Authorisations'.

*NOTE: For the purpose of this guide, we'll continue with our instructions as if you selected the 'Sales and Funding' category.*

**Step 3: Filter criteria**
In the 'Filter criteria' section, filter the report to your specific requirements.

→ Start by choosing an activity type for the area of data you require.

→ Then, select the date type (transaction date, submitted date or funded date) together with the report type ('Summary', with a date range of 25 months or 'Detail', with a date range of 13 months).

→ Once you've outlined your criteria, click the 'Next' button.

**Step 4: Select and customise available reports**
In the 'Available Reports' section, select the report you require from the list of reports displayed in the box.

→ Choose to 'Customise' the report headings if you wish to remove any unwanted headings or change the order of the headings in your report. Click the 'Back' button afterward to return to the main reports page.

*NOTE: You can only customise the headings for certain types of reports.*

**Step 8: View, schedule and/or download the report**

Choose from the following options for viewing the report:

**Run Now**
Click 'Run Now' to display the report on the screen. To download the report, choose from the download format options—PDF, CSV, HTML and Excel—in the top right-hand corner.

**Schedule Report**
Click 'Schedule Report' to arrange for a report to be delivered to you. Select the frequency of the report, the 'starting on' date, the date the information covers, the report format, the delivery method and the report name of your choice.

If you choose the email delivery method, you'll be prompted to complete additional fields. Once complete, your report will be delivered as instructed.

*NOTE: If you choose to create reports in 'Disputes', 'Rate Analysis' and 'Authorisations', keep in mind that each category has its own filter criteria.*

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## View monthly statements

Your monthly statements are available within 48 hours of month end. You can view any statements from the past seven years.

**Step 1:** Select 'Monthly Statements' under the 'Reports' tab in the top navigation.

**Step 2:** Select the year of the statement you require from the dropdown menu.

**Step 3:** Select the type the statement you require from the dropdown menu.

**Step 4:** Click 'Search' to view a list of statements from the year you selected.

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## Group merchant locations together

The 'Group Builder' page offers you the opportunity to create unique groups of your locations by selecting the locations of your choice and running scheduled reports based on those groups.

**Step 1:** Select 'Group Builder' under the 'Account Information' tab in the top navigation.

**Step 2:** Select the locations of your choice.

**Step 3:** Click 'Create Group'.

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## Search for cardholder activity or card issuer information

**Step 1:** Click the 'Search' tab in the top navigation.

**Step 2:** Choose a search area from the dropdown menu. You have the following two options:

**Option1: Search for cardholder activity**
'Cardholder Activity' enables you to perform a search on specific card numbers to research transactions, authorisations, chargebacks and retrievals.

- → Select the activity you require, the date type (submit date or transaction date), the date range, and at least one of the filters below these fields. If using the cardholder number, you can enter the first six and last four digits, the full card number (if known) or just the last four digits.

- → Click 'Submit' to view all the matching transactions.

**Option 2: Search for card issuer information**

'Card Issue Information' enables you to get details on the institution that issued the card, such as the bank name and its mailing address.

- → Enter the first six digits of the card number (also known as the Bank Identification Number or 'BIN').

- → Click 'Submit' to view details about the card issuer.

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Please contact us if you'd like this information in an alternative format such as Braille, large print or audio.