CARDNET

CLIENTLINE®
ENTERPRISE
FREQUENTLY
ASKED
QUESTIONS

September 2022

LLOYDS BANK

What is Clientline® Enterprise?

Clientline® Enterprise is a new reporting tool that will replace Clientline® Reporting. With Clientline® Enterprise you can access key financial data, reporting and statement.

What is Business Track?

Business Track is our online Portal which you access to see applications such as Clientline® Enterprise.

How do I log in to Clientline® Enterprise?

You login to Clientline® Enterprise from the Business Track Portal > Applications > Clientline® Enterprise.

Where will I find my username?

When you register or are registered for Business Track, we will send you an email with your username.

Who do I contact if I need help?

There is a help section available via Clientline® Enterprise which has lots of information and support. If you still need help you will need to contact your customer service team.

Can I add other users to my account?

You would need to ask the new user to self-register via the Business Track website.

Can I change or delete a user's profile?

You cannot manage users via Clientline® Enterprise. If a user no longer requires access to the tool please contact your customer service team who can disable users on your behalf.

How can I reset my password?

You can reset your password by clicking on 'having trouble signing in' and entering your username to reset your password.

Can I still access Clientline® Reporting?

Yes, you can still access Clientline® Reporting until 15th November 2022. After the 15th of November 2022 you will no longer see Clientline® Reporting in your application dropdown.

What happens to my scheduled reports in Clientline® Reporting?

Your scheduled reports will continue to generate until 15th November 2022. After this date these reports will no longer run or be visible in Clientline® Reporting. Unfortunately, these will not be copied over to Clientline® Enterprise, so you will need to set up these scheduled reports in Clientline® Enterprise. Instructions for how to do this are noted below.

How do I register for Clientline® Enterprise?

If you are an existing Clientline® Reporting user, you will automatically have access to Clientline® Enterprise when it is made available. If you are a new user, you can simply self-serve and enrol from our Business Track Portal. Once you have successfully registered you will automatically have access to Clientline® Enterprise.

What can I see on my Clientline® Enterprise homepage?

You can see data split into various sections for example Authorisations, Settlement, Chargebacks and Funding.

How can I schedule a report?

You can schedule a report by following the below steps:

Step 1: Choose the report type for example Authorisation > Decline Reason

Step 2: Click on schedule

Step 3: Enter schedule name

Step 4: Choose the frequency

Step 5: Choose day of week or month (note this is only applicable for weekly, monthly or quarterly reports)

Step 6: Enter file name

Step 7: Choose file type (CSV or XLS)

Step 8: Choose to compress files (this will zip the file, files more than 10MB will automatically be zipped)

Step 9: Choose file summary to see the number of records, file format and when the file was created

Step 10: Click schedule to confirm

How can I see what my scheduled reports in Clientline® Reporting are now called in Clientline® Enterprise?

There is a tool to help you replicate the reports you currently have on Clientline® Reporting onto Clientline® Enterprise. The Report Mapping tool shows you what a report was called in Clientline® Reporting, and what it will be called in Clientline® Enterprise. There are further columns that you can use to refine your search terms. You can access this tool through the Business track login page (after you have logged in).

Where can I download my reports from?

You can download reports by clicking on the download icon. You will need to enter a file name and choose the file type.

How do I edit my scheduled report?

You can edit reports from the My Reports > Schedules section. If you click on the 3 ellipsis (dots) and click edit your can amend your scheduled reports.

Where can I see my authorisations?

To see your real-time authorisations, go to your Clientline® Enterprise Portal homepage and select 'Authorisations' tab.

Where can I download my monthly acquirer statement from?

You can download statements from the 'Summary & Documents' section. You will need to choose the year you would like to download statements from.

Can I customise different fields in my reports?

Yes, you can choose the report fields/pivots from each of the report sections. Once you have chosen your report fields you will need to click 'Go' to access your report.

How long do you hold reporting data for?

Your Clientline® Enterprise Portal can hold reporting data for the last 36 months.

Find out more

Go to lloydsbankcardnet.com

Call us on 01268 567100
lines open from 8am to 9pm
Monday to Saturday

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

Important Information

Calls may be monitored or recorded in case we need to check we have carried out your instructions correctly and to help improve our quality of service.

Please remember we cannot guarantee the security of messages sent by email.

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This information is correct as of September 2022.

Our service promise

If you experience a problem, we will always try to resolve it as quickly as possible. Please bring it to the attention of any member of staff. Our complaints procedures are published at lloydsbankcardnet.com/contactus

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