

Merchant Portal User Guide

An online shortcut to all your reports, tools, and information for busy merchants.

Take this brief tour of the merchant portal to see the new, exciting tools for your use. If any of your questions are not answered here, check the FAQs in the Help section, or feel free to contact us.

Passwords

All designated users should have received an individual login ID and password via E-mail. Compliance with the Payment Card Industry Data Security Standard (PCI) requires that you keep your password confidential and refrain from sharing it among other users. The portal permits different levels of access to a variety of information. By default, only the Owner and Co-owner contacts will initially have access to all the reports. Contacts that are assigned Manager level permissions have access to the Real-time Processing Credit and Gift Reports, but NOT the Daily Settlement, Deposits and Statements. The account settings function will allow the owner(s) of the merchant account to grant access to reports, or allow administrative functions on a per user basis. We strongly encourage the owner(s) to review potential users, determine who needs access to particular information, and create account settings accordingly. It is extremely important for the owner(s) to designate users and provide them with their own access if necessary, rather than share existing passwords. Passwords will expire and you will be prompted to change them every 90 days, in accordance with PCI.

Reports

Do you ever wish you could check your batch for duplicate transactions? Perhaps you would like to verify that a previous business day's batch has been deposited to your account? The online reports can help you find the information you are seeking. To access your Web reports, click the "Reports" link at the top of the page. Here you will have access to all your real-time processing credit reports, batch settlement and deposit reports, and your monthly statements. If you are currently processing gift cards, you will also see Real-time Processing Gift Card report options. Your Real-time Processing Credit Card reports show your complete transaction history and may be used to troubleshoot discrepancies in your batch total, before it is closed. You may select a report from the pre-set reports, or "select custom criteria" to tailor the report to your specific needs. You can also save your custom real-time reports so you don't have to re-create your preferred criteria each time. By selecting Daily Settlement, Deposits and Statements in the reports wizard you can view batch details and the deposit history for your account. Download the reports in Excel format and you can easily import them to the accounting software of your choice. Want to print a report? No problem. When you print a report, it will display in an easy to read format.

Tools

Under the "Tools" heading you will find a bulk processing form, PCI information, Credit Card 101, and a glossary of credit card processing terms. The bulk processing form may be downloaded from the portal. Once you have filled it out, it may be submitted to us electronically. Please keep in mind that you must have a trouble ticket open with us before uploading the form to ensure prompt handling.

Account settings

The owner(s) of the merchant account has access to the highest security information, and will have an Account Settings option at the top of the page. This feature allows the owner(s) to add, delete, and update user profiles as needed. If a phone number or E-mail address change needs to be submitted, it is no longer necessary to call a representative. Additionally, the owner(s) controls the level of access allowed each user. If an employee needs access to the reports, but should not be able to change the account settings, this can easily be accomplished through the account settings. Additionally, the owner(s) may grant administrative privileges to users, at their discretion. Make sure that all users have their own log-in information.

Contact wizard

Requesting technical support is just a click away. Expedite your request by submitting a trouble ticket through the contact wizard. Just click on the "Contact" link and submit your question or problem. The contact wizard will open a trouble ticket, and provide you with a ticket number. We will instantly receive your request, and the appropriate representative will get back to you in a timely manner.

Help

In the help section, you'll find contact information, frequently asked questions, and our Web Reporting Guide, to assist you in your use of the portal and its features. Click here for help with anything, from changing user profiles, running a specific report, or submitting a trouble ticket to tech support.

Messages

We will keep you up-to-date on any new information pertaining to your business through your message inbox. Messages are customized to ensure their relevance and importance to you. Be sure to log-in periodically to retrieve your messages.