



Welcome to the Merchant Website Training

An essential guide to managing your Account online, quickly and simply.

LET'S GET STARTED ►



Merchant Website Training

How to manage your Account online, quickly and simply.

This training guide has 6 Training Modules, showing you the key functions of the Merchant Website. It should take no more than 30 minutes to complete.

To start, click on one of the Modules below.



GET STARTED

Log in and check
your Dashboard



PAYMENTS

Reconcile
payments easily



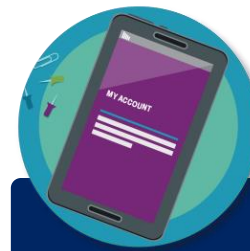
DISPUTES

Manage Card
Member disputes
efficiently



COMPLIMENTARY SIGNAGE

Attract more
customers with
American Express
signage



PROFILE AND SETTINGS

Update
information about
yourself or your
account



GET HELP

Call, email or use
our assistant

Get started

Everything you need to know to get up and running.

Choose from one of the options below to learn about the basic functionality of the site.



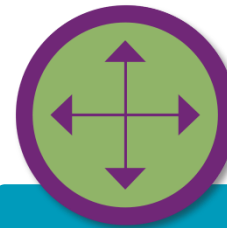
LOG IN



**FORGOT
PASSWORD OR
USER ID**



**ACCOUNT
DASHBOARD**



**NAVIGATE
THROUGH
DIFFERENT AREAS
OF THE WEBSITE**

Get started

Everything you need to know to get up and running.



Log in to the Website

On the [HOMEPAGE](#) enter your User ID and Password and click Log In.

A screenshot of the American Express merchant website. The top navigation bar includes links for 'MY ACCOUNT', 'CARDS', 'TRAVEL', 'INSURANCE', 'REWARDS', and 'BUSINESS'. A secondary bar shows 'New Zealand (Change Country)', 'Contact Us', and a 'LOG IN' button. The main content area has a dark blue background with a calendar graphic showing the number '3'. Text on the page says 'See your online statements earlier in the month.' and 'E-Statements will now typically arrive by day 3 of each month. To receive e-Statements, create your online Account today.' with a 'Register Now' button. On the right, a white login box titled 'Login to your Merchant Account' contains fields for 'USER ID' and 'PASSWORD', a 'Remember Me' checkbox, and a 'Log In' button. Below the login box are links for 'Forgot User ID or Password ?' and 'Register Now'. The bottom of the page features a navigation bar with buttons for 'HOME', 'BACK', 'GET STARTED', 'LOG IN', 'FORGOT PASSWORD OR USER ID', 'ACCOUNT DASHBOARD', 'MERCHANT MENU', 'PAYMENTS', 'DISPUTES', 'COMPLIMENTARY SIGNAGE', 'PROFILE & SETTINGS', 'GET HELP', and 'NEXT'.

Get started

Everything you need to know to get up and running



Forgotten user ID or password

Click [FORGOT USER ID OR PASSWORD](#) on the homepage to get a reminder or reset your password.

Forgotten your User ID?

You'll be asked to enter the email address connected to your account.

Forgotten your password?

You'll be asked to enter your User ID and then answer one of the below questions:

- Answer to the security question
- Location number
- Bank information of one of the locations you manage

A screenshot of the American Express Business website. The header includes the American Express logo, navigation links for 'MY ACCOUNT', 'CARDS', 'TRAVEL', 'INSURANCE', 'REWARDS', and 'BUSINESS', and a 'New Zealand (Change Country) Contact Us LOGIN' link. The main navigation bar has links for 'Home', 'Manage Your Account', 'Attract Customers', 'Support', and 'Accept the Card'. The main content area features a large blue banner with the text 'See your online statements earlier in the month.' and a calendar icon showing the number '3'. Below this is a 'Register Now' button. On the right side, there is a 'Login to your Merchant Account' form with fields for 'USER ID' and 'PASSWORD', a 'Remember Me' checkbox, and a 'Log In' button. A purple box highlights the 'Forgot User ID or Password ?' link below the login form.

Get started

Everything you need to know to get up and running



Account Dashboard

Once you've logged in, you'll see your **ACCOUNT DASHBOARD**. From here you'll be able to see:

1. Notifications about your Account
2. A menu to navigate between different areas of the website
3. Recent payments
4. Disputes
5. A way to order complimentary signage

Click on 1 2 3 4 5 to find out more about each section. To return to the Account Dashboard click

Please note that the content you can see in your Dashboard may vary depending on what you're entitled to view.

MERCHANT123

You have 3 new notifications out of 23 total notifications **1**

Menu **2**

- Service Requests
- Payments
- Disputes
- Profile and Settings >
- Logos and Supplies
- User guides >

Order logos and supplies **5**

Payments **3**

Settlements Pending

NZD \$807,300.04
settled in the last 7 days
(from 05/02/2018 to today)

Submission amount NZD \$813,927.02
Merchant Fees NZD \$-6,626.98
Fees and incentives NZD \$0.00

Last 7 days Last 30 days Month to date

Disputes **4**

Take Action Closed

Take Action **35** Cases

Reply by	Submitting merchant	Case number	Amount
15/07/17	9423853415	D-BB0402B →	NZD \$200.00
15/07/17	9423853415	D-CC0403C →	NZD \$200.00
15/07/17	9423853415	D-DD0404D →	NZD \$200.00
15/07/17	9423853415	D-EE0405E →	NZD \$200.00
15/07/17	9423853415	D-FF0406F →	NZD \$200.00

See all 'Take action' disputes

Logos and Supplies **5**

Featured products

See all signs and supplies

Get started

Everything you need to know to get up and running



Notifications

Unread notifications are in bold. Click on the notification to read it. Once you have, it will be unbolded.

The screenshot shows the Merchant123 dashboard. The top navigation bar includes links for Dashboard, Payments, Disputes, Logos and Supplies, and Resources. The left sidebar contains a Menu with links for Service Requests, Payments, Disputes, Profile and Settings, Logos and Supplies, and User guides. The main content area is divided into three sections: Notifications, Payments, and Disputes. The Notifications section is highlighted with a red box and contains four notifications, with the first one being bolded. The Payments section shows a summary of payments for the last 7 days, with a total of NZD \$807,300.04. The Disputes section shows a table of disputes with columns for Take Action, Reply by, Submitting merchant, Case number, and Amount.

Notifications

- You have 0 new notifications out of 23 total notifications**
- 28/10/2017
You can now watch a 30 minute training video to help you manage disputes and payments online. Register here to have instant access.
- 07/10/2017
New payments user guide is available for download. Click User Guides link from the menu.
- 07/10/2017
Not receiving disputes notification? Click on Profile & Settings link and update your preference.
- 16/09/2017

Payments

Settlements **Pending**

NZD \$807,300.04
settled in the last 7 days
(from 05/02/2018 to today)

Submission amount	NZD \$813,927.02
Merchant Fees	NZD \$-6,626.98
Fees and incentives	NZD \$0.00

Disputes **See all disputes**

	Take Action	Closed
Take Action ①	Reply by	Submitting merchant
	Case number	Amount
	15/07/17	9423853415
	15/07/17	9423853415
	15/07/17	9423853415
	15/07/17	9423853415

Get started

Everything you need to know to get up and running



Menu Navigation

Click on any part of the Menu to navigate to other areas within the site. Click on [Profile & Settings](#) and [User Guides](#) to open a second navigation panel to view additional options.

Clicking on the [Up Arrow](#) will collapse the Menu Bar.

The screenshot shows the Merchant123 dashboard. The top navigation bar includes links for Dashboard, Payments, Disputes, Logos and Supplies, and Resources. A notification bell indicates 3 new notifications out of 23 total. The left sidebar menu is highlighted with a red box and includes options like Service Requests, Payments, Disputes, Profile and Settings, Logos and Supplies, User guides, Order logos and supplies, and Log out. The main content area is divided into several sections: Payments (showing a settlement of NZD \$807,300.04), Disputes (showing a table of disputes with columns for Reply by, Submitting merchant, Case number, and Amount), and Logos and Supplies (showing featured products). A 'Walk Me Through' button is visible on the right side of the dashboard.

Get started

Everything you need to know to get up and running



Payments

The Payment section provides a snap shot of the payments made to your Account. By default you view the paid payments summary, but you can see upcoming payments by clicking on 'Pending' tab. To quickly view your E-statement, or All Payments, use the navigation buttons on the top right.

Merchant123

Dashboard Payments Disputes Logos and Supplies Resources

You have 3 new notifications out of 23 total notifications

Payments E-statement See all payments

Settlements Pending

NZD \$807,300.04
settled in the last 7 days
(from 05/02/2018 to today)

Submission amount NZD \$813,927.02
Merchant Fees NZD \$-6,626.98
Fees and incentives NZD \$0.00

Last 7 days Last 30 days Month to date

Disputes See all disputes

Take Action Closed

35 Cases

Take Action	Reply by	Submitting merchant	Case number	Amount
	15/07/17	9423853415	D-BB0402B →	NZD \$200.00
	15/07/17	9423853415	D-CC0403C →	NZD \$200.00
	15/07/17	9423853415	D-DD0404D →	NZD \$200.00
	15/07/17	9423853415	D-EE0405E →	NZD \$200.00
	15/07/17	9423853415	D-FF0406F →	NZD \$200.00

See all 'Take action' disputes

Logos and Supplies

Featured products

See all signs and supplies

Walk Me Through

Get started

Everything you need to know to get up and running



Disputes

By default, you will see the list of most recent cases that you need to respond to. You can view recent closed cases by clicking on 'Closed' tab. Clicking on the case number will allow you to view the details of the specific case.

MERCHANT123

You have 3 new notifications out of 23 total notifications

Menu

- Service Requests
- Payments
- Disputes
- Profile and Settings >
- Logos and Supplies
- User guides >

Order logos and supplies

Put Push

Browse selection

Payments

E-statement See all payments

Settlements Pending

NZD \$807,300.04

settled in the last 7 days
(from 05/02/2018 to today)

Submission amount NZD \$813,927.02
Merchant Fees NZD \$-6,626.98
Fees and incentives NZD \$0.00

Last 7 days Last 30 days Month to date

Disputes

See all disputes

Take Action Closed

	Reply by	Submitting merchant	Case number	Amount
Take Action ①	15/07/17	9423853415	D-BB0402B →	NZD \$200.00
35 Cases	15/07/17	9423853415	D-CC0403C →	NZD \$200.00
	15/07/17	9423853415	D-DD0404D →	NZD \$200.00
	15/07/17	9423853415	D-EE0405E →	NZD \$200.00
	15/07/17	9423853415	D-FF0406F →	NZD \$200.00

See all 'Take action' disputes

Logos and Supplies

Featured products

See all signs and supplies

Walk Me Through

Get started

Everything you need to know to get up and running



Logos and Supplies

To view the Complimentary Logos and Supplies, click the ['Browse selection'](#) link. You'll be taken to our website where you can browse and order our complimentary merchandise and signage.

Dashboard Payments Disputes Logos and Supplies Resources

MERCHANT123

You have 3 new notifications out of 23 total notifications

Menu

- Service Requests
- Payments
- Disputes
- Profile and Settings
- Logos and Supplies
- User guides

Order logos and supplies

Put Push

[Browse selection](#)

Payments E-statement See all payments

Settlements Pending

NZD \$807,300.04
settled in the last 7 days
(from 05/02/2018 to today)

Submission amount NZD \$813,927.02
Merchant Fees NZD \$-6,626.98
Fees and incentives NZD \$0.00

Last 7 days Last 30 days Month to date

Disputes See all disputes

Take Action Closed

	Reply by	Submitting merchant	Case number	Amount
Take Action	15/07/17	9423853415	D-BB0402B	NZD \$200.00
	15/07/17	9423853415	D-CC0403C	NZD \$200.00
	15/07/17	9423853415	D-DD0404D	NZD \$200.00
	15/07/17	9423853415	D-EE0405E	NZD \$200.00
	15/07/17	9423853415	D-FF0406F	NZD \$200.00

35 Cases

See all 'Take action' disputes

Logos and Supplies

Featured products

[See all signs and supplies](#)

Get started

Everything you need to know to get up and running



Merchant Menu

The top Menu allows you to navigate to the other areas of the site.

This menu will take you to the same locations as the Menu and Dashboard navigation.

The screenshot shows the Merchant Menu dashboard for MERCHANT123. The top navigation bar includes links for Dashboard, Payments, Disputes, Logos and Supplies, and Resources. A notification banner indicates 3 new notifications out of 23 total. The left sidebar contains a 'Menu' section with links for Service Requests, Payments, Disputes, Profile and Settings, Logos and Supplies, and User guides. Below this is a 'Browse selection' button. The main content area is divided into several sections: 'Payments' showing a settlement of NZD \$807,300.04, 'Disputes' with a table of 35 cases, and 'Logos and Supplies' featuring products. A vertical banner on the right side reads 'Walk Me Through'.

Payments

Settlements Pending

NZD \$807,300.04
settled in the last 7 days
(from 05/02/2018 to today)

Submission amount NZD \$813,927.02
Merchant Fees NZD \$-6,626.98
Fees and incentives NZD \$0.00

Last 7 days Last 30 days Month to date

Disputes

Take Action Closed

35 Cases

Take Action	Reply by	Submitting merchant	Case number	Amount
	15/07/17	9423853415	D-BB0402B →	NZD \$200.00
	15/07/17	9423853415	D-CC0403C →	NZD \$200.00
	15/07/17	9423853415	D-DD0404D →	NZD \$200.00
	15/07/17	9423853415	D-EE0405E →	NZD \$200.00
	15/07/17	9423853415	D-FF0406F →	NZD \$200.00

See all 'Take action' disputes

Logos and Supplies

Featured products

See all signs and supplies

Payments

Learn how to manage everything to do with payments



**PAYMENTS AT A
GLANCE**



**CUSTOMISE
REPORTS**



**DOWNLOAD
REPORTS**



EXPORT REPORTS



SEARCH REPORTS

Payments

Learn how to manage everything to do with payments



Payments at a Glance

The [PAYMENTS HOMEPAGE](#) has 5 key features:

1. Location/date filters
2. Tools
3. Payments summary
4. Report menu
5. View report

Click on **1 2 3 4 5** at the top to find out more about each section. To return to Payments Homepage click

The screenshot shows the Payments homepage interface. The top navigation bar includes links for Dashboard, Payments, Disputes, Attract Customers, and Resources. The main content area is divided into several sections:

- 1** Location/date filters: A section with filters for LOCATION (200/200) and DATE (1/2/2018 - 21/2/2018).
- 2** Tools: A section with a 'Payments overview' button and an 'E-STATEMENT' button.
- 3** Payments summary: A section showing a summary of payments, including a table with columns for Total submissions, Total charges, Total credits, Merchant Fee, Tax amount, and Fees & incentives. The total settlement amount is NZ\$1,435,945.49.
- 4** Report menu: A section with a 'Settlements' button and a 'Submissions' button.
- 5** View report: A section with a 'Pending' button and a 'Settlements' button.

The table below shows the data for the 'Settlements' section:

SETTLEMENT DATE	SETTLEMENT NUMBER	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT	MERCHANT FEE AMOUNT	FEES AND INCENTIVES	CHARGEBACKS	ADJUSTMENTS	SETTLEMENT AMOUNT
9/2/2018	03940614	NZ\$167,925.03	NZ\$0.00	NZ\$167,925.03	NZ\$1,366.23	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$166,558.80
8/2/2018	03840529	NZ\$148,493.88	NZ\$0.00	NZ\$148,493.88	NZ\$1,206.61	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$147,287.27
7/2/2018	03640792	NZ\$164,384.49	NZ\$0.00	NZ\$164,384.49	NZ\$1,338.78	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$163,045.71
6/2/2018	03640791	NZ\$142,649.01	NZ\$56.00	NZ\$142,593.01	NZ\$1,337.37	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$141,431.64
5/2/2018	03341067	NZ\$191,030.22	NZ\$499.61	NZ\$190,530.61	NZ\$1,553.99	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$188,976.62
4/2/2018	03341066	NZ\$192,476.58	NZ\$6.99	NZ\$192,469.59	NZ\$1,567.95	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$190,901.64

Payments

Learn how to manage everything to do with payments



Location and date filters

You can filter payment information based on location and/or date period in any of the 4 key categories:

- Settlements
- Submissions
- Adjustments and chargebacks
- Transaction type

The payments information will update automatically in the report area based on your selection.

The screenshot shows the 'Payments' dashboard with a blue header bar containing navigation links: Dashboard, Payments, Disputes, Logos and Supplies, and Resources. A user profile icon and a mail icon are on the right. Below the header, there's a section for filters: 'LOCATIONS (2)' and 'DATE (18/2017 - 18/2017)'. To the right of these filters is a 'Payments overview' button and a search icon. Below the filters are two calendar widgets for 'From: 1/8/2017' and 'To: 18/8/2017'. Below the calendars are 'Cancel' and 'RESET' buttons, and a 'View' button. Below these are four summary cards: Settlements, Submissions, Adjustments and Chargebacks, and Transaction types. Below the cards is a table with the following data:

SETTLEMENT DATE	SETTLEMENT NUMBER	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT	MERCHANT FEE AMOUNT	FEES AND INCENTIVES	CHARGEBACKS	ADJUSTMENTS	SETTLEMENT AMOUNT
9/2/2018	03940614	NZ\$167,925.03	NZ\$0.00	NZ\$167,925.03	NZ\$1,366.23	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$166,558.80

Payments

Learn how to manage everything to do with payments



Tools

The tool bar gives you the options to:

1. Launch the Payments overview tour
2. Download, export and search reports
3. Access your e-statement

See the other sections in the Payments Module for more information on these tools.

Click here to view a new user guide

LOCATIONS (200/200) DATE (1/2/2018 - 21/2/2018)

Payments overview

Settlements Submissions Adjustments and Chargebacks Transaction types

Total settlement amount NZ\$1,435,945.49

⊕ Pending

⊖ Settlements

SETTLEMENT DATE	SETTLEMENT NUMBER	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT	MERCHANT FEE AMOUNT	FEES AND INCENTIVES	CHARGEBACKS	ADJUSTMENTS	SETTLEMENT AMOUNT
9/2/2018	03940614	NZ\$167,925.03	NZ\$0.00	NZ\$167,925.03	NZ\$1,366.23	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$166,558.80
8/2/2018	03840529	NZ\$148,493.88	NZ\$0.00	NZ\$148,493.88	NZ\$1,206.61	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$147,287.27
7/2/2018	03640792	NZ\$164,384.49	NZ\$0.00	NZ\$164,384.49	NZ\$1,338.78	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$163,045.71
6/2/2018	03640791	NZ\$142,649.01	NZ\$56.00	NZ\$142,593.01	NZ\$1,161.37	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$141,431.64
5/2/2018	03341067	NZ\$191,030.22	NZ\$499.61	NZ\$190,530.61	NZ\$1,553.99	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$188,976.62
4/2/2018	03341066	NZ\$192,476.58	NZ\$6.99	NZ\$192,469.59	NZ\$1,567.95	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$190,901.64

Payments

Learn how to manage everything to do with payments



Payments summary

This gives you a cumulative summary of your most recent payments from American Express for the current month. Use the + expandable function to display extra details about the various types of deductions taken before payment.

DashboardPaymentsDisputesAttract CustomersResources

Click here to view a new user guide

LOCATIONS (200/200)DATE (1/2/2018 - 21/2/2018)Payments overviewE-STATEMENT

Expand all

Total submissionsNZ\$1,447,731.95

Total chargesNZ\$1,448,365.60

Total creditsNZ\$633.65

Merchant FeeNZ\$11,786.46

Tax amountNZ\$0.00

Fees & incentivesNZ\$0.00

Total settlement amountNZ\$1,435,945.49

SettlementsSubmissionsAdjustments and ChargebacksTransaction types

Pending

Settlements

+	SETTLEMENT DATE	SETTLEMENT NUMBER	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT	MERCHANT FEE AMOUNT	FEES AND INCENTIVES	CHARGEBACKS	ADJUSTMENTS	SETTLEMENT AMOUNT
+	9/2/2018	03940614	NZ\$167,925.03	NZ\$0.00	NZ\$167,925.03	NZ\$1,366.23	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$166,558.80
+	8/2/2018	03840529	NZ\$148,493.88	NZ\$0.00	NZ\$148,493.88	NZ\$1,206.61	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$147,287.27
+	7/2/2018	03640792	NZ\$164,384.49	NZ\$0.00	NZ\$164,384.49	NZ\$1,338.78	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$163,045.71
+	6/2/2018	03640791	NZ\$142,649.01	NZ\$56.00	NZ\$142,593.01	NZ\$1,161.37	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$141,431.64
+	5/2/2018	03341067	NZ\$191,030.22	NZ\$499.61	NZ\$190,530.61	NZ\$1,553.99	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$188,976.62
+	4/2/2018	03341066	NZ\$192,476.58	NZ\$6.99	NZ\$192,469.59	NZ\$1,567.95	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$190,901.64

Payments

Learn how to manage everything to do with payments



Report menu

There are 4 different types of reports you can view:

1. Settlements – paid and pending information.
2. Submissions – details of all the submissions you have made to American Express.
3. Adjustments and Chargebacks - All your chargebacks and other adjustments applied to your submissions.
4. Transaction Types – Access the report which groups your settlements based on the type of transaction.

Dashboard Payments Disputes Attract Customers Resources

Click here to view a new user guide

LOCATIONS (200/200) DATE (1/2/2018 - 21/2/2018)

Payments overview

Settlements Submissions Adjustments and Chargebacks Transaction types

Expand all

- Total submissions NZ\$1,447,731.95
- Total charges NZ\$1,448,365.60
- Total credits NZ\$633.65
- Merchant Fee -NZ\$11,786.46
- Tax amount NZ\$0.00
- Fees & incentives NZ\$0.00

Total settlement amount NZ\$1,435,945.49

Pending

Settlements

	SETTLEMENT DATE	SETTLEMENT NUMBER	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT	MERCHANT FEE AMOUNT	FEES AND INCENTIVES	CHARGEBACKS	ADJUSTMENTS	SETTLEMENT AMOUNT
+	9/2/2018	03940514	NZ\$167,925.03	NZ\$0.00	NZ\$167,925.03	-NZ\$1,366.23	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$166,558.80
+	8/2/2018	03840529	NZ\$148,493.88	NZ\$0.00	NZ\$148,493.88	-NZ\$1,206.61	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$147,287.27
+	7/2/2018	03640792	NZ\$164,384.49	NZ\$0.00	NZ\$164,384.49	-NZ\$1,338.78	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$163,045.71
+	6/2/2018	03640791	NZ\$142,649.01	-NZ\$56.00	NZ\$142,593.01	-NZ\$1,161.37	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$141,431.64
+	5/2/2018	03341067	NZ\$191,030.22	-NZ\$499.61	NZ\$190,530.61	-NZ\$1,553.99	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$188,976.62
+	4/2/2018	03341066	NZ\$192,476.58	-NZ\$6.99	NZ\$192,469.59	-NZ\$1,567.95	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$190,901.64

Payments

Learn how to manage everything to do with payments



View report

This summary table will allow you to view detail of the report you have chosen in the menu above.

The summary will automatically update based on the relevant report you choose to view from the 4 boxes at the top.

Where '+' appears, clicking on it will expand to show more details.

The right arrow button will allow you to scroll side to side and view additional details.

The screenshot shows the 'Payments overview' dashboard. At the top, there's a navigation bar with 'Dashboard', 'Payments', 'Disputes', 'Attract Customers', and 'Resources'. Below this, a summary table on the left lists various metrics like 'Total submissions', 'Total charges', 'Total credits', 'Merchant Fee', 'Tax amount', and 'Fees & incentives'. A 'Total settlement amount' of NZ\$1,435,945.49 is displayed. A purple circle highlights a '+' icon next to the 'Settlements' section. Below this, a table shows settlement details for 9/2/2018, including settlement number, total charges, credits, and submission amount. A purple circle highlights a '-' icon next to the settlement date. Below the settlement table, a 'Submissions' table is shown with columns for settlement date, submission date, SOC invoice #, submitting merchant number, merchant fees, fees and incentives, total charges, credits, transaction count, submitting location ID, and submission ID. A purple circle highlights a '-' icon next to the settlement date in the submissions table. On the right side of the dashboard, there are four tabs: 'Settlements', 'Submissions', 'Adjustments and Chargebacks', and 'Transaction types'. A purple circle highlights a right arrow button on the far right of the dashboard.

Settlements	Submissions	Adjustments and Chargebacks	Transaction types
-------------	-------------	-----------------------------	-------------------

Settlement Date	Settlement Number	Total Charges	Credits	Submission Amount
9/2/2018	03940614	NZ\$167,925.03	NZ\$0.00	NZ\$167,925.03

Settlement Date	Submission Date	SOC Invoice #	Submitting Merchant Number	Merchant Fees	Fees and Incentives	Total Charges	Credits	Transaction Count	Submitting Location ID	Submission ID
9/2/2018	8/2/2018	180208	9840	NZ\$3.57	NZ\$0.00	NZ\$440.68	NZ\$0.00	9	9192	NZ\$440.68
9/2/2018	8/2/2018	180208	9840	NZ\$2.49	NZ\$0.00	NZ\$307.16	NZ\$0.00	5	9183	NZ\$307.16

Payments

Learn how to manage everything to do with payments



Customise reports

You can customise the report column details by clicking on the + on the top left.

This will bring up a screen where you can check or uncheck data fields based on your needs. You can drag and drop the fields to change the order of the columns.

Please note: Any changes you make will be saved for future log-ins.

The screenshot displays the 'Payments overview' dashboard. At the top, there's a navigation bar with links to Dashboard, Payments, Disputes, Attract Customers, and Resources. Below this, a summary section shows 'LOCATIONS (2)' and 'DATE (18/2/17 - 18/9/2017)'. A table lists various metrics: Total submissions (NZ\$1,447,731.95), Total charges (NZ\$1,448,365.60), Total credits (NZ\$633.65), Merchant Fee (NZ\$11,786.46), Tax amount (NZ\$0.00), and Fees & incentives (NZ\$0.00). The 'Total settlement amount' is highlighted as NZ\$1,435,945.49. A modal window is open, allowing users to customise the report columns. It lists various fields with checkboxes and a plus icon for expansion. The fields include: Settlement date, Settlement number, Total charges, Credits, Submission amount, Discount amount, Fees and incentives, DBA name, Chargebacks, Bank sort code, Adjustments, Settlement amount, Payee merchant number, Payee location ID, Number of transactions, Opening debit balance, Bank account no., and Tax amount. The modal has 'Cancel', 'RESET', and 'Apply' buttons.

Payments

Learn how to manage everything to do with payments



Download reports

1. Customise the report to contain all the information you want, then click the Download icon in the top right navigation bar.
2. Follow the prompts to select your preferences and click Download to save the report to your computer.

Once it's downloaded, you can analyse it further and print it from the application you selected.

The screenshot shows the 'Payments overview' page. A modal titled 'Settlements' is open, prompting the user to download a report. The modal includes options for 'Download with details?', 'Please select the row range you want to download' (set to 1-9), 'Customise column selection', and 'Select format' (CSV, XLSX, PDF). It also has checkboxes for 'Pending settlements' and 'Include Currency Symbols'. A 'Download' button is visible in the modal. In the background, a table lists settlement data.

	SETTLEMENT DATE	SETTLEMENT NUMBER								SETTLEMENT AMOUNT
+	9/2/2018	03940614	NZ\$148,493.88	NZ\$0.00	NZ\$148,493.88	NZ\$1,206.61	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$166,558.80
+	8/2/2018	03840529	NZ\$164,384.49	NZ\$0.00	NZ\$164,384.49	NZ\$1,338.78	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$147,287.27
+	7/2/2018	03640792	NZ\$142,649.01	NZ\$56.00	NZ\$142,593.01	NZ\$1,161.37	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$163,045.71
+	6/2/2018	03640791	NZ\$191,030.22	NZ\$499.61	NZ\$190,530.61	NZ\$1,553.99	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$141,431.64
+	5/2/2018	03341067	NZ\$192,476.58	NZ\$6.99	NZ\$192,469.59	NZ\$1,567.95	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$188,976.62
+	4/2/2018	03341066								NZ\$190,901.64

Payments

Learn how to manage everything to do with payments



Export reports

1. To export a report click on Report in the top right navigation bar.
2. Follow the prompts to select a report with or without transaction details, enter your Merchant Number and click Download.

Note that one report includes data for one location only.

The screenshot shows the Payments dashboard with a blue header bar containing navigation links: Dashboard, Payments, Disputes, Attract Customers, and Resources. A user profile icon is in the top right. Below the header, there's a 'Click here to view a new user guide' link. The main content area has a 'Payments overview' tab and a 'Report' icon (highlighted with a red box). A modal titled 'Submissions Report' is open, showing options to 'Include Transactions' (unchecked), a 'Merchant no.' field with a placeholder 'Payee Merchant Number', and a 'Select format' section with radio buttons for 'CSV' (selected) and 'XLSX'. There are 'Cancel', 'RESET', and 'Download' buttons. Below the modal, there's a table of settlements with columns: SETTLEMENT DATE, SETTLEMENT NUMBER, TOTAL CHARGES, CREDITS, SUBMISSION AMOUNT, MERCHANT FEE AMOUNT, FEES AND INCENTIVES, CHARGEBACKS, ADJUSTMENTS, and SETTLEMENT AMOUNT. The table contains 7 rows of data.

	SETTLEMENT DATE	SETTLEMENT NUMBER	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT	MERCHANT FEE AMOUNT	FEES AND INCENTIVES	CHARGEBACKS	ADJUSTMENTS	SETTLEMENT AMOUNT
+	9/2/2018	03940614	NZ\$167,925.03	NZ\$0.00	NZ\$167,925.03	NZ\$1,366.23	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$166,558.80
+	8/2/2018	03840529	NZ\$148,493.88	NZ\$0.00	NZ\$148,493.88	NZ\$1,206.61	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$147,287.27
+	7/2/2018	03640792	NZ\$164,384.49	NZ\$0.00	NZ\$164,384.49	NZ\$1,338.78	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$163,045.71
+	6/2/2018	03640791	NZ\$142,649.01	NZ\$56.00	NZ\$142,593.01	NZ\$1,161.37	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$141,431.64
+	5/2/2018	03341067	NZ\$191,030.22	NZ\$499.61	NZ\$190,530.61	NZ\$1,553.99	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$188,976.62
+	4/2/2018	03341066	NZ\$192,476.58	NZ\$36.99	NZ\$192,469.59	NZ\$1,567.95	NZ\$0.00	NZ\$0.00	NZ\$0.00	NZ\$190,901.64

Payments

Learn how to manage everything to do with payments



Search reports

The Search function allows you to find specific settlements, adjustments, chargebacks or transaction information. You can narrow the search by amount, location, date and more.

Direct debit reports can be produced from here as well.

The screenshot displays the Payments dashboard with a search modal open. The modal allows filtering by 'Settlements' with date ranges (Starts: 1/2/2018, Ends: 21/2/2018) and amount ranges (From: , To:). It also includes a 'Settlement number' field and radio buttons for 'All locations (200/200)' and 'Selected locations (200/200)'. The background shows a table of settlement data.

	SETTLEMENT DATE	SETTLEMENT NUMBER	TOTAL CHA
+	9/2/2018	03940614	NZ\$167,925.03
+	8/2/2018	03840529	NZ\$148,493.88
+	7/2/2018	03640792	NZ\$164,384.49
+	6/2/2018	03640791	NZ\$142,649.01
+	5/2/2018	03341067	NZ\$191,030.22
+	4/2/2018	03341066	NZ\$192,476.58

Disputes

Find out how to manage all your disputes online quickly and easily



**DISPUTES AT A
GLANCE**



**VIEW DETAILS OF
A CASE**



**RESPOND TO
DISPUTE
ENQUIRIES**



**CUSTOMISED
REPORTS**

IMPORTANT REMINDER

- Once you are enrolled to online Disputes, you will no longer receive paper notifications.
- Please check our notification emails and regularly check the website to avoid unnecessary chargebacks.
- If you have changed your email address since your registration with us, please make sure to update the email address on the website so you continuously receive our notifications.
- Please go to [Profile and settings](#) module for more information on how to do this.

Disputes

Find out how to manage all your disputes online quickly and easily



Disputes at a glance

The **DISPUTES HOMEPAGE** has four key features:

1. Filters
2. Tools
3. Respond to us
4. Summary report

Click on **1 2 3 4** at the top to find out more about each section. To return to Disputes Homepage click on

The screenshot shows the Disputes Homepage interface. At the top, there is a navigation bar with links: Dashboard, Payments, Disputes, Attract Customers, and Resources. Below this, there is a filter section with tabs for LOCATIONS (11/11) and DATE. The filter section includes a dropdown for TAKE ACTION (2992), a dropdown for RESPONDED (53), a dropdown for CLOSED (76870), and a dropdown for ADJUSTMENTS (5). There is also a button labeled 'How to respond to a dispute'. Below the filter section, there is a table with three columns: Agree to Full Refund, Respond, and Respond offline. The table contains a list of disputes with columns: CASE NUMBER, STATUS, DATE RECEIVED, REPLY BY, DAYS LEFT, REASON AND CODE, DISPUTE TYPE, CASE TYPE, AMOUNT, and CARD NUMBER AT TRANSACTION. The table lists 15 disputes, all with a status of 'Please respond' and a reason of 'Charge amount exceeds authorization amount-A01'. The table is paginated, showing 12 of 2992 disputes.

Disputes

Find out how to manage all your disputes online quickly and easily



Filters

These help you find and view the information that matters most to you. You can apply a wide range of filters in combination with each other to personalise the disputes summary table and show as little or as much as you like.

The screenshot shows a web application interface for managing disputes. At the top is a navigation bar with links: Dashboard, Payments, Disputes, Attract Customers, and Resources. Below this is a filter section with tabs for 'TAKE ACTION' (2992), 'RESPONDED' (53), 'CLOSED' (76870), and 'ADJUSTMENTS' (5). There are also radio buttons for 'All', 'Unviewed', 'Viewed', 'All', 'Chargebacks', 'Inquiries', and 'Case Updates'. A button 'How to respond to a dispute' is also present. Below the filters is a table with columns: CASE NUMBER, STATUS, DATE RECEIVED, REPLY BY, DATES LEFT, REASON AND CODE, DISPUTE TYPE, CASE TYPE, AMOUNT, and CARD NUMBER AT TRANSACTION. The table contains 10 rows of dispute data.

CASE NUMBER	STATUS	DATE RECEIVED	REPLY BY	DATES LEFT	REASON AND CODE	DISPUTE TYPE	CASE TYPE	AMOUNT	CARD NUMBER AT TRANSACTION
1073869TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,200.00	700372XXXXXXX1003
1142590TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,73.22	700832XXXXXXX1007
1198430TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,478.98	700812XXXXXXX1001
1243607TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	0.00	700552XXXXXXX1002
1296778TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,200.00	100802XXXXXXX1006
1329074TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,73.22	100252XXXXXXX1006
1398916TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,478.98	100542XXXXXXX1008
1448870TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	0.00	100142XXXXXXX1008
1494126TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,200.00	100432XXXXXXX1000
1542064TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,73.22	100872XXXXXXX1006
1588980TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,478.98	100902XXXXXXX1003
1653508TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	0.00	100712XXXXXXX1005
1779129TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,200.00	100462XXXXXXX1000
1840179TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,73.22	100372XXXXXXX1002
1858850TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,478.98	100282XXXXXXX1000

Disputes

Find out how to manage all your disputes online quickly and easily



Tools

These allow you to download and generate reports, create print previews, search, or return to your Account Dashboard or page at any time.

LOCATIONS (1111) DATE

TAKE ACTION 2992 RESPONDED 53 CLOSED 76870 ADJUSTMENTS 5

How to respond to a dispute

Showing 1-20 of 2992

CASE NUMBER	STATUS	DATE RECEIVED	REPLY BY	DATE LEFT	REASON AND CODE	DISPUTE TYPE	CASE TYPE	AMOUNT	CARD NUMBER AT TRANSACTION
1073869TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,200.00	00372XXXXXXX00001003
1142590TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,73.22	00832XXXXXXX00001007
1198430TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,478.98	00612XXXXXXX00001001
1243607TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	0.00	00552XXXXXXX00001002
1296778TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,200.00	00802XXXXXXX00001006
1329074TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,73.22	00252XXXXXXX00001006
1308916TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,478.98	00542XXXXXXX00001008
1448870TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	0.00	00142XXXXXXX00001008
1494126TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,200.00	00432XXXXXXX00001000
1542064TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,73.22	00872XXXXXXX00001006
158890TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,478.98	00802XXXXXXX00001003
1653508TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	0.00	00712XXXXXXX00001005
1779129TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,200.00	00462XXXXXXX00001000
1840179TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,73.22	00372XXXXXXX00001002
1858850TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NTD 5,478.98	00282XXXXXXX00001000

Help & Chat

Disputes

Find out how to manage all your disputes online quickly and easily



Respond to us

These action buttons are clearly marked above the summary table to enable you to respond to all Card Member disputes quickly and efficiently.

The screenshot shows the 'Disputes' section of a dashboard. The top navigation bar includes 'Dashboard', 'Payments', 'Disputes', 'Attract Customers', and 'Resources'. The 'Disputes' section has filters for 'LOCATIONS (1111)', 'DATE', 'TAKE ACTION 2992', 'RESPONDED 53', 'CLOSED 76870', and 'ADJUSTMENTS 5'. Below these are tabs for 'All', 'Unviewed', 'Viewed', 'All', 'Chargebacks', 'Inquiries', and 'Case Updates'. A 'How to respond to a dispute' button is highlighted. Below this are three buttons: 'Agree to Full Refund', 'Respond', and 'Respond offline'. The 'Respond' button is selected, leading to a 'Respond' form. The form includes a 'Respond' section with a '0' input field, a 'Select a reason' dropdown, a 'Select a comment' dropdown, and an 'Additional comments' text area. To the right of the form is a 'Add attachments' section with a warning message: 'Choosing to respond means that you do not agree with the dispute. Please submit documentation that verifies the charge. You can also choose to submit a partial refund to the Card Member below.' Below this are two checkboxes: 'Proof that a valid Authorization Approval was obtained for the full amount of the Charge in accordance with the Agreement unless exceptions apply, or' and 'Proof that a Credit which directly offsets the Disputed Charge has already been processed'. Below these are instructions on what attachments must be: 'JPG, TIFF, DOC, DOCX, or PDF', '100, 200 or 300 DPI', and 'Black and white'. There are also instructions on the number of attachments: 'When responding to a single case: No more than 20 pages or 4MB and 5 files per case. When responding to multiple cases: No more than 20 files per response. Images may not exceed 1MB and documents (DOC, DOCX, PDF) may not exceed 4MB.' At the bottom of the form are 'Cancel', 'Enter initials to verify this information', and 'Submit' buttons.

Disputes

Find out how to manage all your disputes online quickly and easily



Summary Report

This gives you a full list of all Card Members disputes and can be customised based on your preferences.

	CASE NUMBER	STATUS	DATE RECEIVED	REPLY BY	DATE LEFT	REASON AND CODE	DISPUTE TYPE	CASE TYPE	AMOUNT	CARD NUMBER AT TRANSACTION
<input type="checkbox"/>	1073869TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,200.00	700372XXXXXXX1003
<input type="checkbox"/>	1142590TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,73.22	700832XXXXXXX1007
<input type="checkbox"/>	1198430TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,478.98	700812XXXXXXX1001
<input type="checkbox"/>	1243607TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	0.00	700552XXXXXXX1002
<input type="checkbox"/>	1296778TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,200.00	100802XXXXXXX1006
<input type="checkbox"/>	1329074TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,73.22	100252XXXXXXX1006
<input type="checkbox"/>	1398916TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,478.98	100542XXXXXXX1008
<input type="checkbox"/>	1448870TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	0.00	100142XXXXXXX1008
<input type="checkbox"/>	1494126TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,200.00	100432XXXXXXX1000
<input type="checkbox"/>	1542064TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,73.22	100872XXXXXXX1006
<input type="checkbox"/>	1588980TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,478.98	100902XXXXXXX1003
<input type="checkbox"/>	1653508TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	0.00	100712XXXXXXX1005
<input type="checkbox"/>	1779129TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,200.00	100462XXXXXXX1000
<input type="checkbox"/>	1840179TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,73.22	100372XXXXXXX1002
<input type="checkbox"/>	1858850TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	NZD 5,478.98	100282XXXXXXX1000

Disputes

Find out how to manage all your disputes online quickly and easily



View details of a case

Clicking on each line item on the summary table will show you the details and history of the case.

Click on the X icon to close the screen.

The screenshot displays a web application for managing disputes. The top navigation bar includes links for Dashboard, Payments, Disputes, Attract Customers, and Resources. Below this, a filter bar shows 'LOCATIONS (11/11)', 'DATE', and a table with columns for TAKE ACTION, RESPONDED, CLOSED, and ADJUSTMENTS. A dropdown menu for 'How to respond to a dispute' is open, showing options like 'Agree to Full Refund', 'Respond', and 'Respond offline'. The main content area features a table with columns for CASE NUMBER, STATUS, DATE RECEIVED, REPLY BY, DAYS LEFT, REASON AND CODE, DISPUTE TYPE, CASE TYPE, AMOUNT, and CARD NUMBER AT TRANSACTION. A specific case is highlighted, showing details such as 'Dispute details', 'Disputed amount', 'Chargeback amount', and 'Transaction amount'. A 'Print Preview' button is visible. Below the details, there are sections for 'What you can do' and 'What will happen'. The bottom of the screen shows a navigation bar with buttons for HOME, BACK, GET STARTED, PAYMENTS, DISPUTES, COMPLIMENTARY SIGNAGE, PROFILE & SETTINGS, GET HELP, and NEXT.

TAKE ACTION	RESPONDED	CLOSED	ADJUSTMENTS
2992	53	76870	5

How to respond to a dispute

Agree to Full Refund Respond Respond offline

CASE NUMBER	STATUS	DATE RECEIVED	REPLY BY	DAYS LEFT	REASON AND CODE	DISPUTE TYPE	CASE TYPE	AMOUNT	CARD NUMBER AT TRANSACTION
I073869TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01	IQ	N/A	\$203.00	700372XXXXXXX1003

Dispute details

The amount of the Authorization Approval was less than the amount of the Charge you submitted.

Additional information: CARD MEMBER DONT RECOGNIZE CHARGE

Disputed amount \$203.00

Chargeback amount \$203.00

Transaction amount \$267.00

Card Member Rahul 3013DATA SETUP_JOB

Tracking number N/A

Card Number 700372XXXXXXX1003

Case type SEDIS

What you can do

Please respond to this dispute and attach any documentation that may support your response.

What will happen

We will review your response and contact you if we need further information from you.

DATE	STATUS CHANGE	DISPUTE TYPE	DETAILS
4/4/2017	Please respond	Inquiry	Please respond to this inquiry by 4/25/2017 VIEW ALL

Disputes

Find out how to manage all your disputes online quickly and easily



Respond to disputes

Once you confirm the details of a case you will need to respond to our enquiries to avoid no-reply chargebacks. The next steps after confirming details of a case are:

1. Click on the line item on the summary page and select one of the three options. The 'Respond' button lets you respond to us online.
2. If you do not agree with a refund, make sure to leave this value with '0'.
3. Add comments why you do not agree.
4. Upload your support documents (e.g. proof of delivery) by clicking Attach files. Please read the explanation to make sure your files can be uploaded.
5. Enter your initials and click Submit.

The screenshot shows a web application interface for managing disputes. At the top is a blue navigation bar with links: Dashboard, Payments, Disputes, Attract Customers, and Resources. Below this is a filter bar with 'LOCATIONS (11/11)', 'DATE', and a 'TAKE ACTION' dropdown set to '2992'. It also shows 'RESPONDED 53', 'CLOSED 76870', and 'ADJUSTMENTS 5'. A 'How to respond to a dispute' tab is active, showing three buttons: 'Agree to Full Refund', 'Respond' (highlighted with a red box), and 'Respond offline'. The 'Respond' section contains a form with a '0' in a text field, a 'Select a reason' dropdown, and a 'Select a comment' dropdown. Below these is an 'Additional comments' text area. To the right, a warning message states: 'Choosing to respond means that you do not agree with the dispute. Please submit documentation that verifies the charge. You can also choose to submit a partial refund to the Card Member below.' Underneath is an 'Add attachments' section with a list of requirements: 'Support required to request a Chargeback Reversal', 'Proof that a valid Authorisation Approval was obtained for the full amount of the Charge in accordance with the Agreement unless exceptions apply, or', and 'Proof that a Credit which directly offsets the Disputed Charge has already been processed'. It also lists attachment rules: 'Attachments must be: JPEG, TIFF, DOC, DOCX, or PDF; 100, 200 or 300 DPI; Black and white; When responding to a single case: No more than 20 pages or 4MB and 5 files per case. When responding to multiple cases: No more than 20 files per response. Images may not exceed 1MB and documents (DOC, DOCX, PDF) may not exceed 4MB.' At the bottom, there are 'Cancel' and 'Submit' buttons, with a checkbox for 'Enter initials to verify this information'.

Disputes

Find out how to manage all your disputes online quickly and easily



Customised Reports

You can also create customised reports. To do this:

1. Click on the Report icon
2. Select Group by
3. Choose your preferences and then click Download reports.
4. You can also create Win/Loss report to analyse why you are getting chargebacks.

The screenshot shows the 'Disputes' section of a dashboard. At the top, there's a navigation bar with 'Dashboard', 'Payments', 'Disputes', 'Attract Customers', and 'Resources'. Below this, there's a filter bar with 'LOCATIONS (11/11)', 'DATE', and 'TAKE ACTION 2992'. A table of disputes is displayed with columns: CASE NUMBER, STATUS, DATE RECEIVED, REPLY BY, DAYS LEFT, and REASON AND CODE. A modal window titled 'Download reports' is open, showing options for 'Group by' (Win/Loss), 'Detail level' (Summary/Detailed), 'Status' (All), 'Dispute Type' (All Dispute Types), 'Locations' (All locations), 'Dates' (All dates), 'Records' (No Results), and 'Report format' (CSV, XLS, XLSX). A 'Download reports' button is at the bottom of the modal.

CASE NUMBER	STATUS	DATE RECEIVED	REPLY BY	DAYS LEFT	REASON AND CODE
I073869TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I142590TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I198430TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I243607TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I296778TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I329074TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I398916TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I448870TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I494126TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I542064TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I588980TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I653508TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I779129TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01
I840179TST	Please respond	4/4/2017	4/25/2017	N/A	Charge amount exceeds authorization amount-A01

Complimentary signage

The fastest and easiest way to get merchandise and supplies for your business

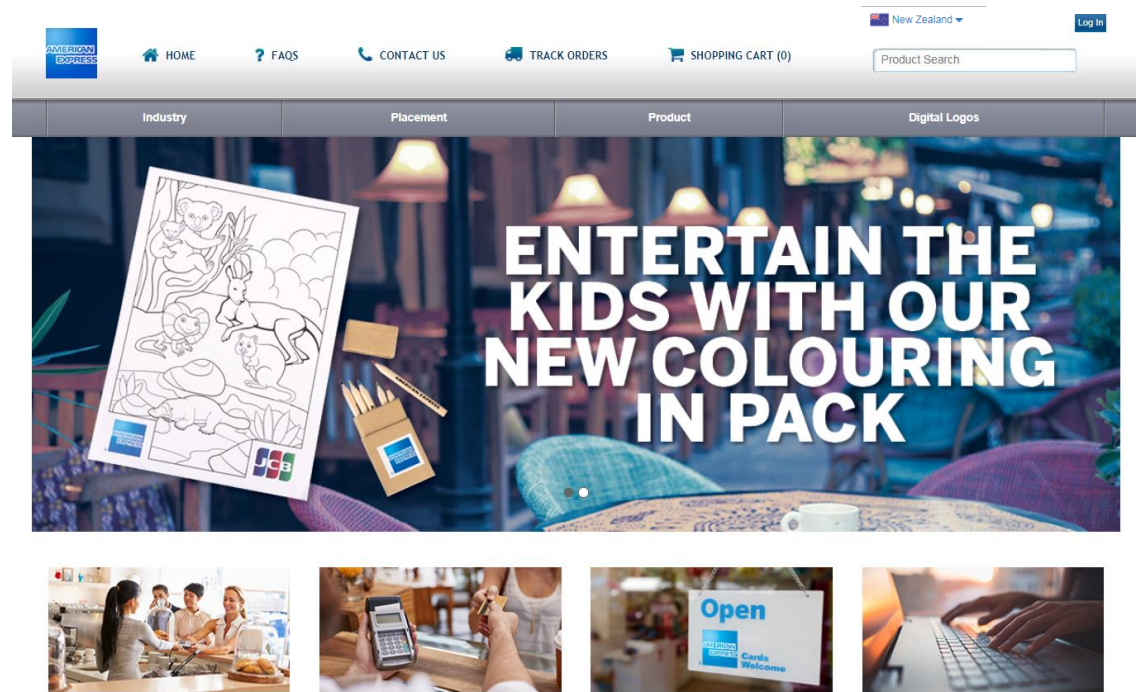


Logos and Supplies

We offer complimentary logos, signage and merchandise for your business.

Placing an order is simple. Select items from our collection, fill out the delivery details and then confirm your Merchant Number to finalise the order.

You'll find hundreds of industry-specific supplies, including digital logos to use online or in your own communications.



Profile and settings

Manage your profile quickly and easily



Profile and Settings

You can update your user profile and account information by clicking Profile & Settings link. From here you can:

1. Change your password
2. Update your contact information
3. Update your preferences on how you receive notifications from us
4. Update your preferences on receiving marketing and/or survey emails
5. Update information about locations (physical address, phone number)

The screenshot shows a merchant dashboard with a blue header. The header contains navigation links: Dashboard, Payments, Disputes, Logos and Supplies, and Resources. On the right side of the header, there is an envelope icon and a user profile icon, which is highlighted with a red square. Below the header, there is a row of tabs: Merchant Home, Manage Your Account, Streamline Payments, Attract Customers, Get Support, and Accept the Card. Below the tabs, there is a link to 'Download Account User Management user guide'. The main content area shows the merchant's name 'MERCHANT123' and a 'TERMS OF USE' link. On the left side of the main content area, there is a sidebar with a list of options: ACCOUNT SUMMARY, CHANGE PASSWORD (highlighted with a dark background), CONTACT INFORMATION, NOTIFICATION, MARKETING & SURVEY EMAIL PREFERENCES, and MANAGE LOCATIONS. On the right side of the main content area, there is a 'CHANGE PASSWORD' section with a password field and a 'SEE DETAILS' link. Below the 'CHANGE PASSWORD' section, there is an 'EDIT' link.

Get help

Where to go if you need more help with the Merchant Website



Questions

Do you have any further questions or need help? Click on your preferred option below to see more details.

CALL US

Call us on the number on the right side of this page.

LIVE CHAT

INTERACTIVE
WALKME ASSISTANT

Call us on
0800 800 855
(or the designated number for your Account)

Get help

Where to go if you need more help with the Merchant Website



Questions

Do you have any further questions or need help? Click on your preferred option below to see more details.

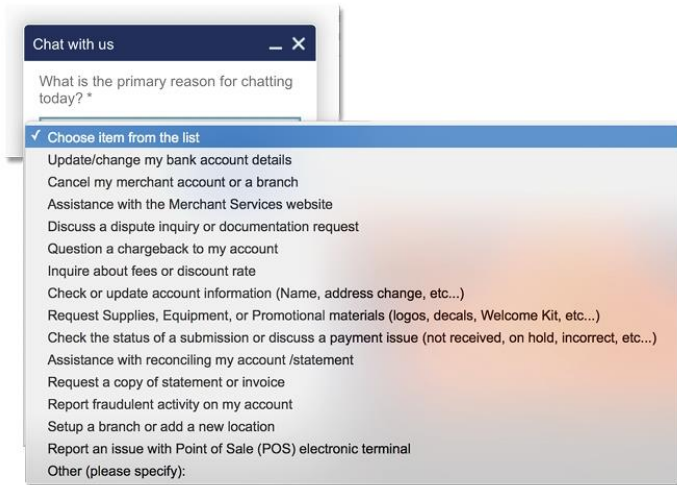
CALL US

LIVE CHAT

INTERACTIVE
WALKME ASSISTANT

Click the 'Chat' icon on the bottom right corner of the screen, to start a Live Chat with Customer Service.
Available Mon- Fri 9-6:00

 Chat



Get help

Where to go if you need more help with the Merchant Website



Questions

Do you have any further questions or need help? Click on your preferred option below to see more details.

CALL US

LIVE CHAT

INTERACTIVE
WALKME ASSISTANT

Click this button to launch the Help Menu. Choose the topic you need help with and WalkMe will prompt you what to do next.

The screenshot shows the Merchant Website dashboard for 'MERCHANT123'. The top navigation bar includes links for Dashboard, Payments, Disputes, Logos and Supplies, and Resources. A notification banner indicates 'You have 3 new notifications out of 23 total notifications'. The main content area is divided into several sections:

- Menu:** A sidebar menu with options: Service Requests, Payments, Disputes, Profile and Settings, Logos and Supplies, and User guides.
- Payments:** A section showing a balance of NZD \$807,300.04 settled in the last 7 days. It includes a table with columns for Submission amount, Merchant Fees, and Fees and incentives. A 'Take Action' button is visible.
- Disputes:** A section showing a table of disputes with columns for Reply by, Submitting merchant, Case number, and Amount. A 'Take Action' button is visible.

On the right side of the dashboard, there is a vertical button labeled '? Walk Me Through'.



Congratulations!

You have completed the training.
Log in today and take the stress out
of managing your Account.

LOG IN

