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

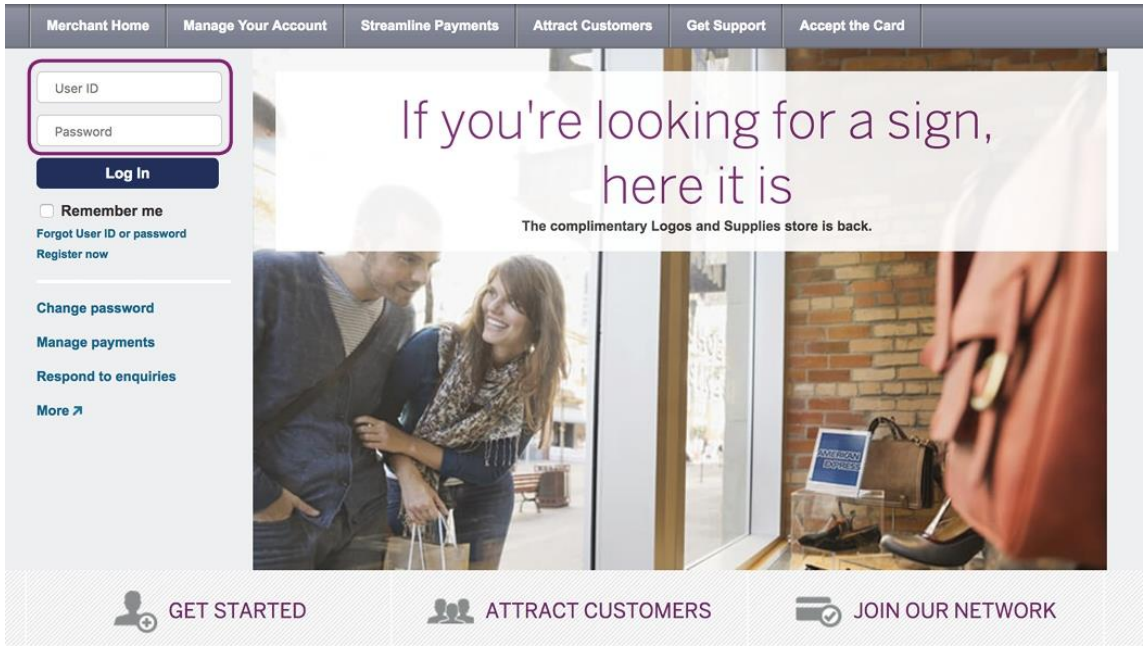
NAVIGATE THROUGH DIFFERENT AREAS OF THE WEBSITE

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.



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.

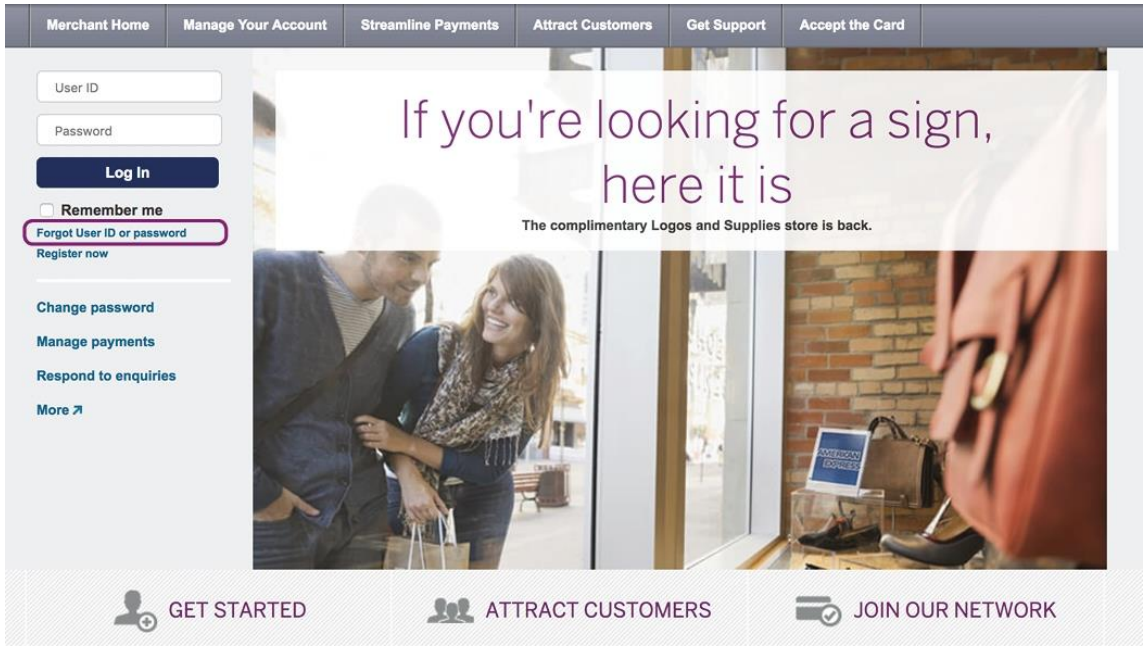
Forgotten your User ID?

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



Get started

Everything you need to know to get up and running

1 2 3 4 5

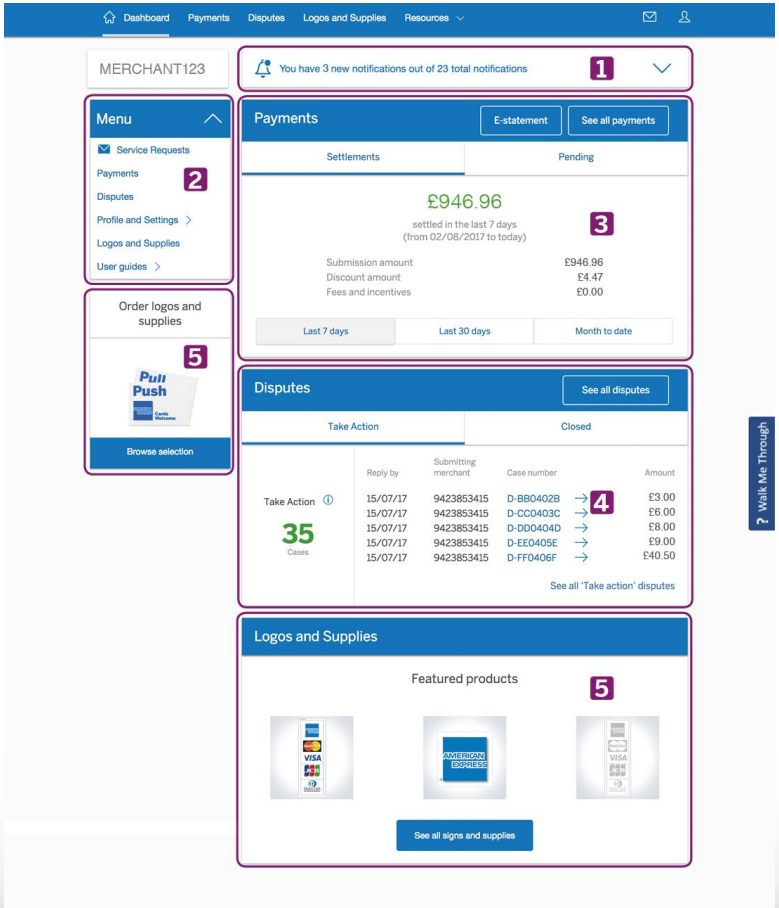
Account Dashboard

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.



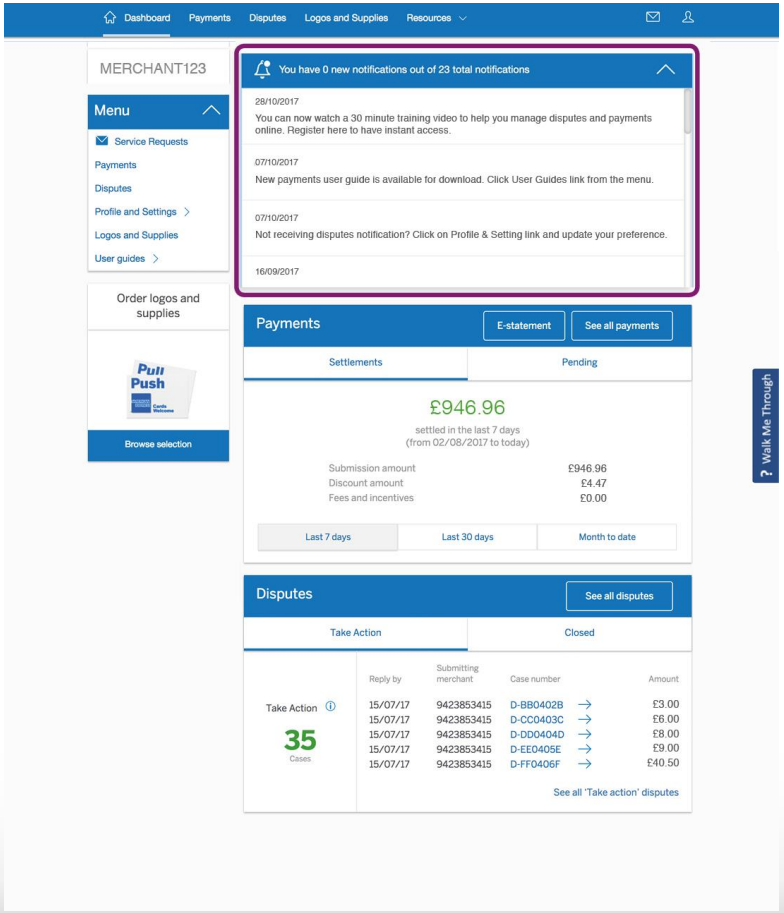
Get started

Everything you need to know to get up and running

1 2 3 4 5

Notifications

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



Get started

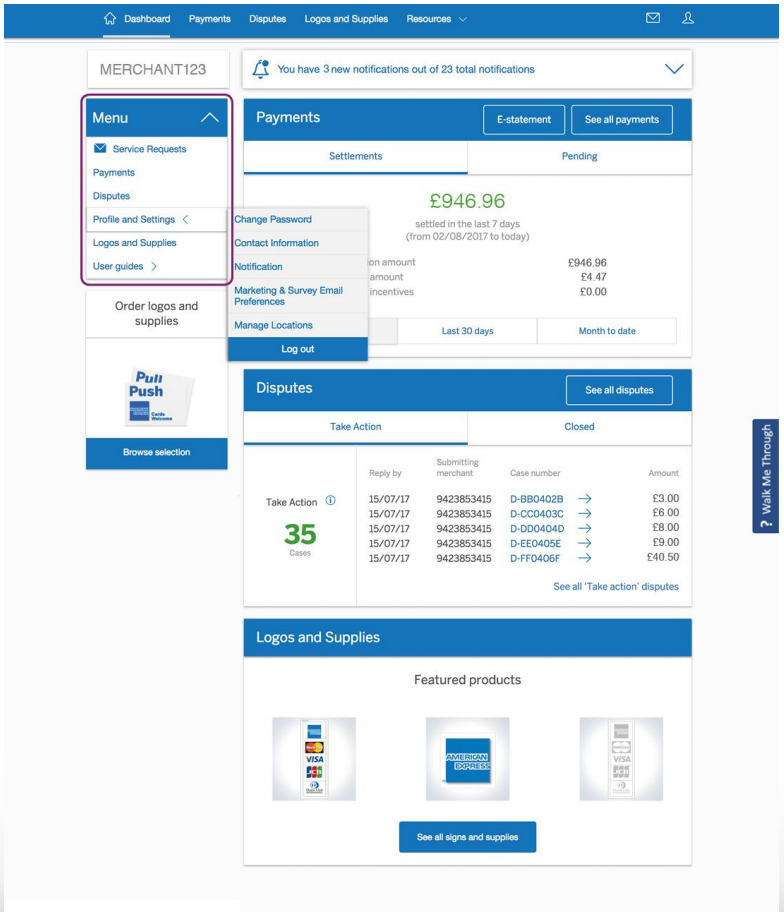
Everything you need to know to get up and running

1 2 3 4 5

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.



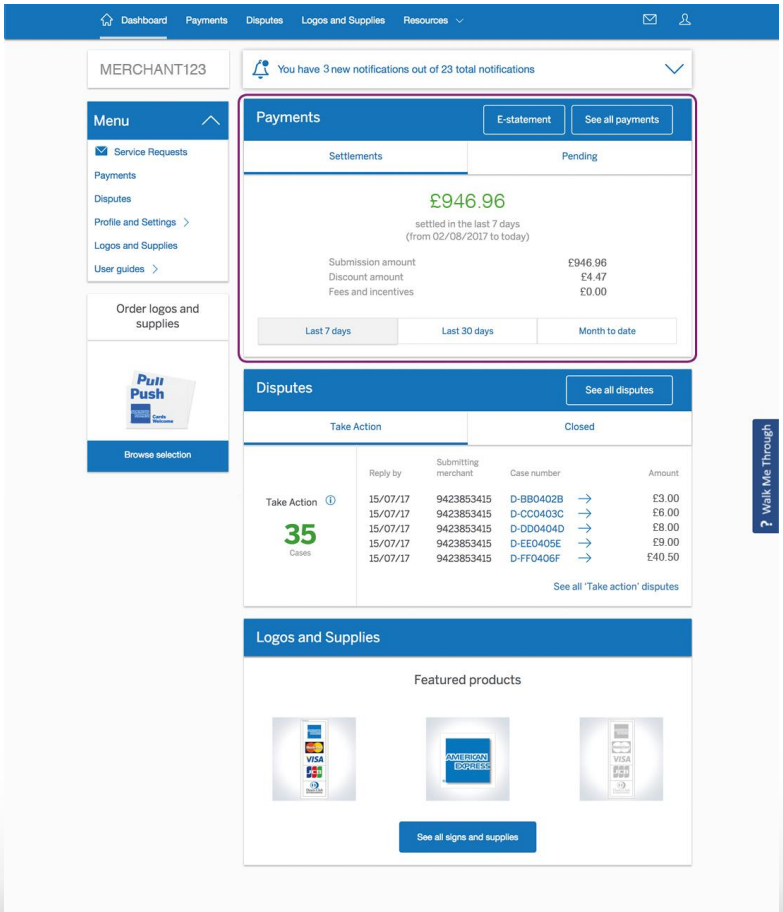
Get started

Everything you need to know to get up and running

1 2 **3** 4 5

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. To quickly view your E-statement, or All Payments, use the navigation buttons on the top right.



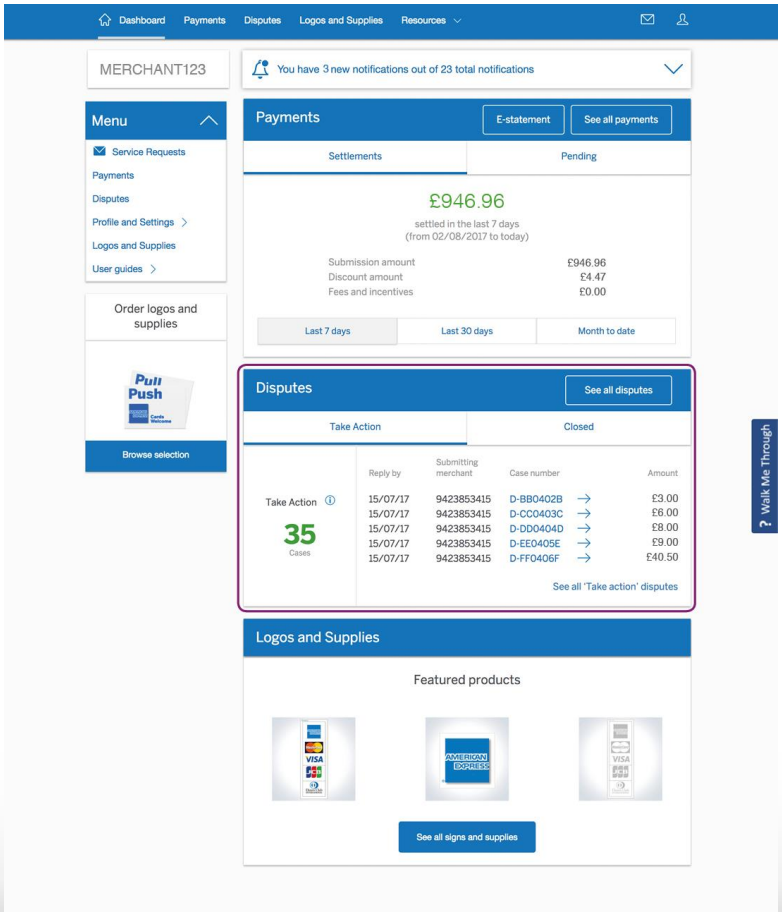
Get started

Everything you need to know to get up and running

1 2 3 4 5

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. Clicking on the case number will allow you to view the details of the specific case.



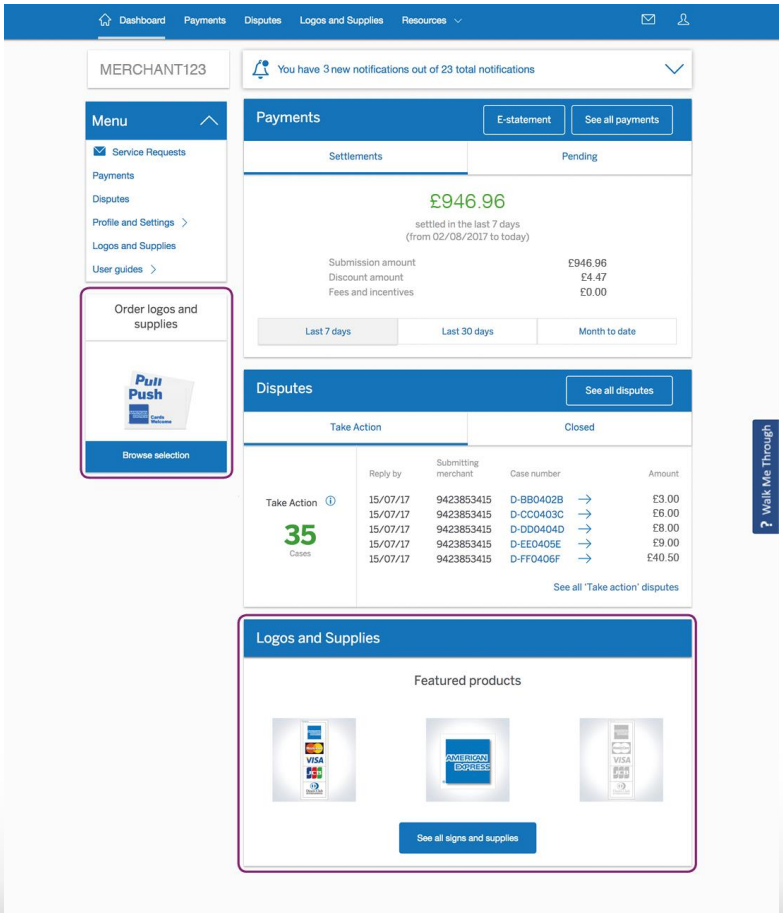
Get started

Everything you need to know to get up and running

1 2 3 4 5

Logos and Supplies

To view the Complimentary Logos and Supplies, click the link. You'll be taken to our website where you can browse our complimentary merchandise and signage.



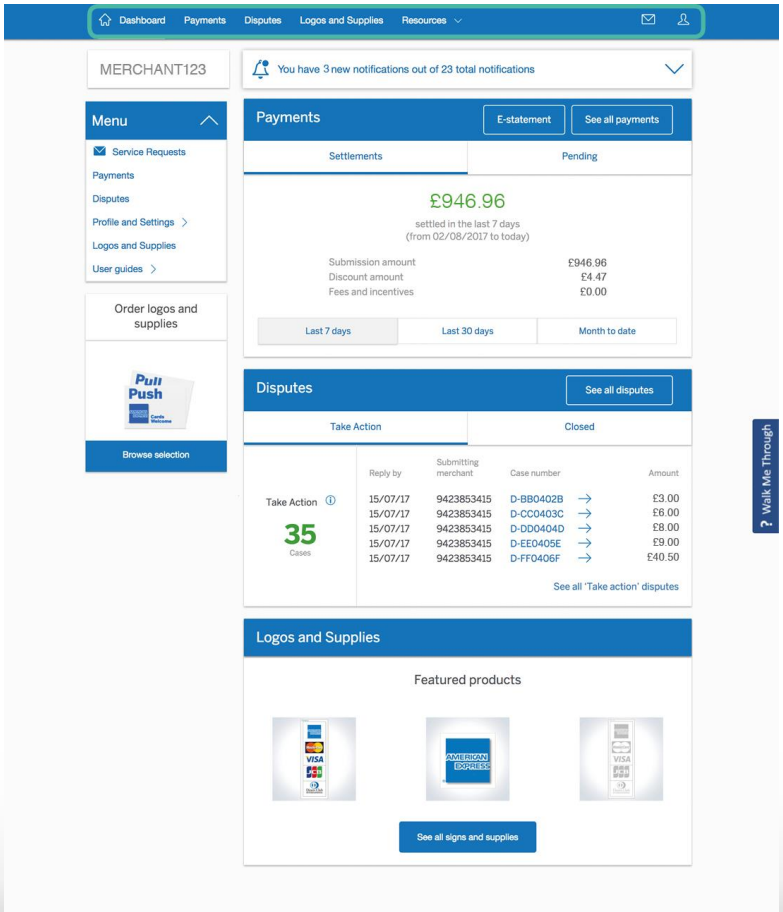
Get started

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.



Payments

Learn how to manage everything to do with payments

Payments

Learn how to manage everything to do with payments

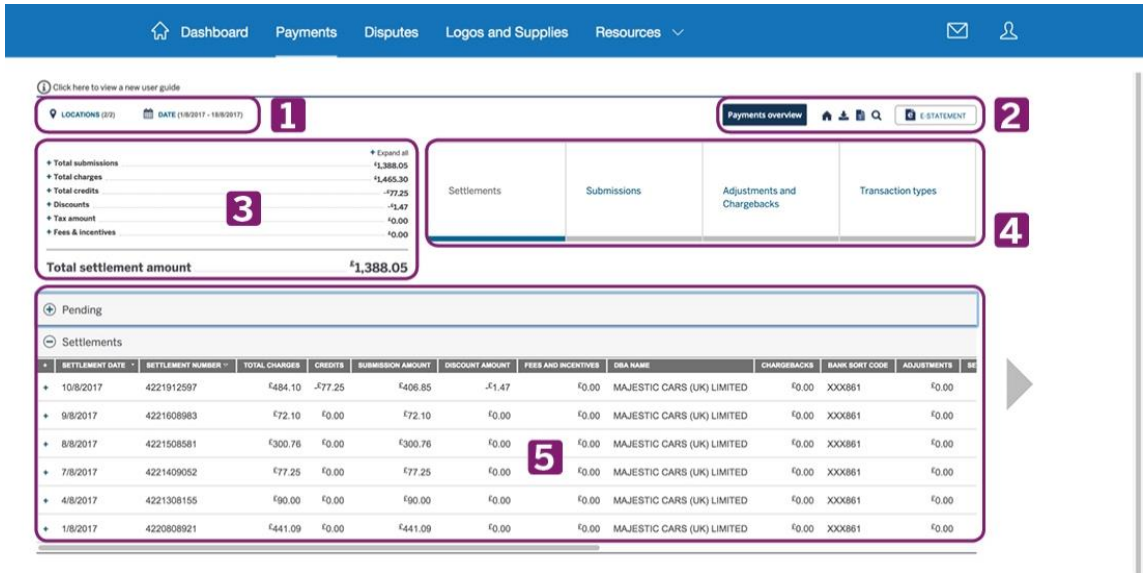
1 2 3 4 5

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



Payments

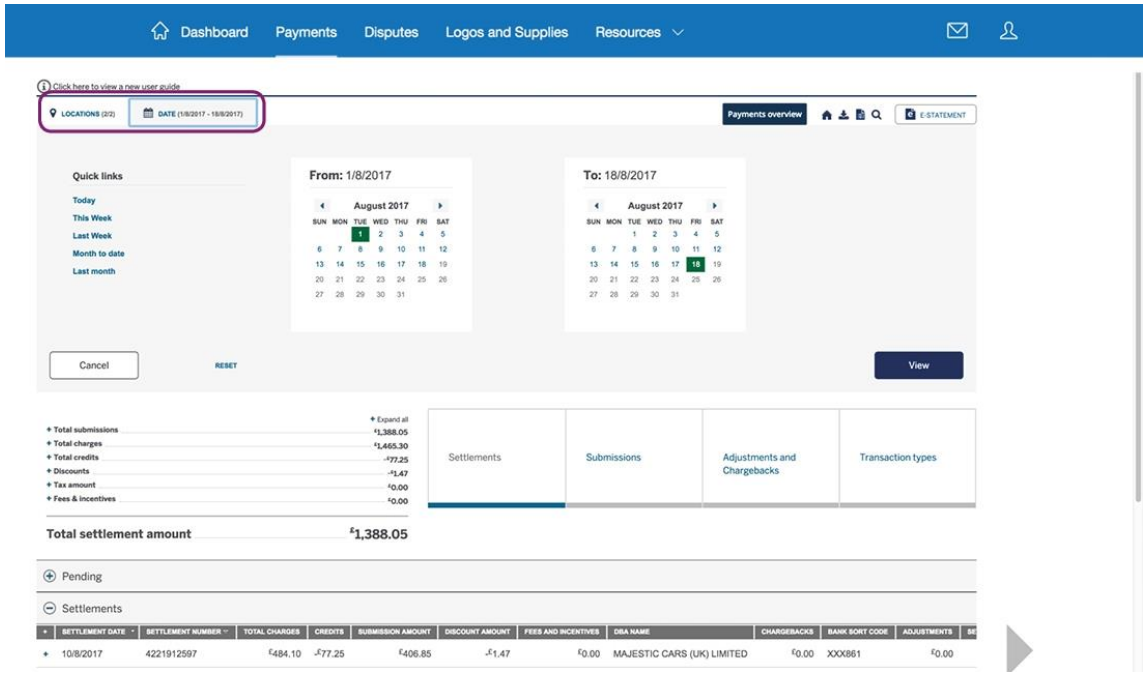
Learn how to manage everything to do with payments

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.



Payments

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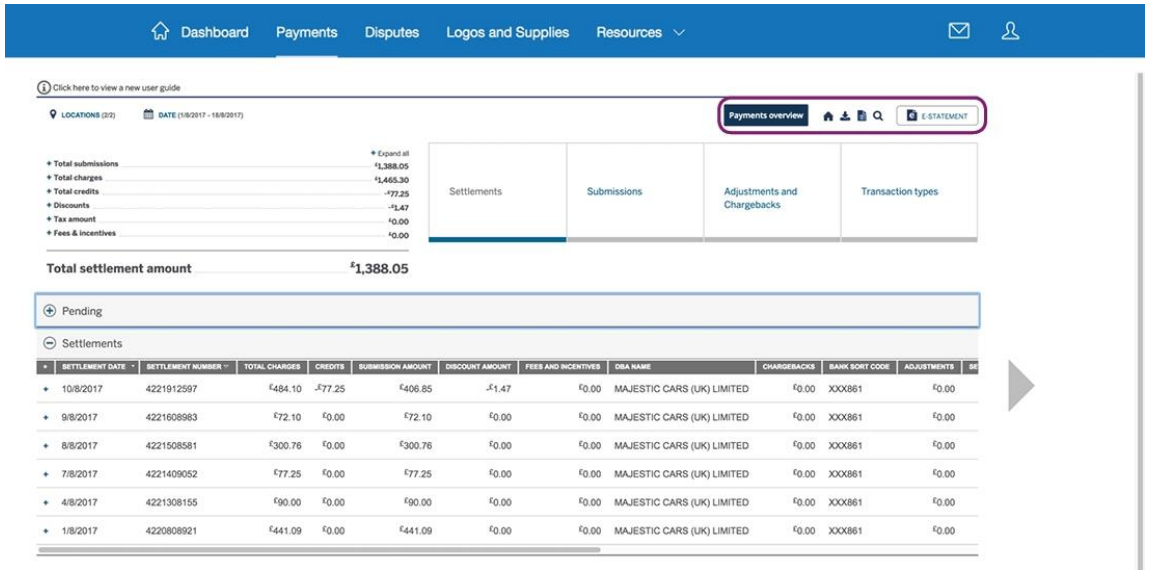
1 2 3 4 5

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.



Payments

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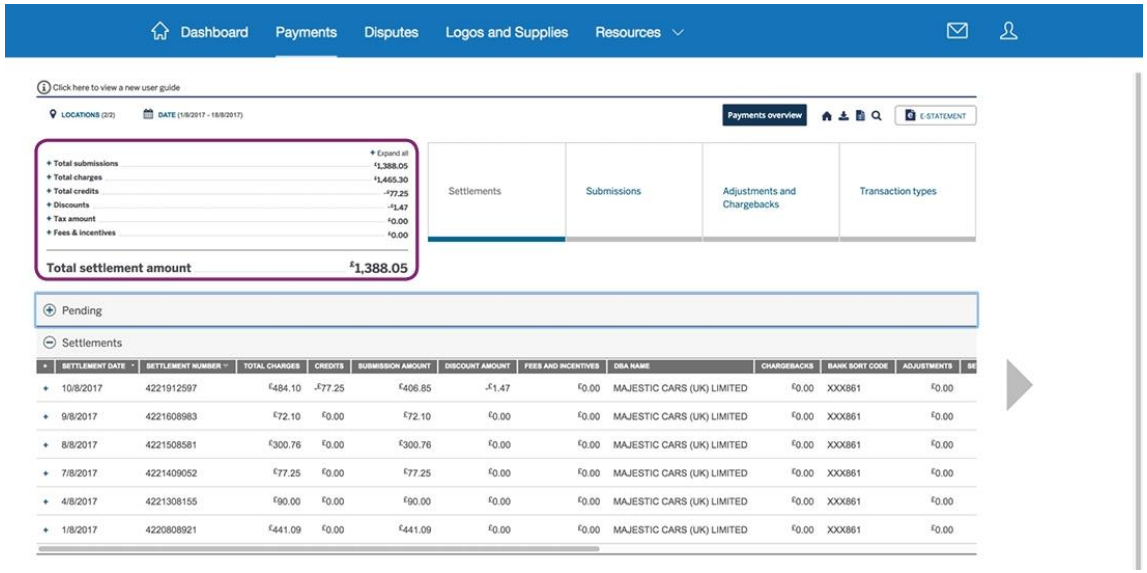
1 2 3 4 5

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.



Payments

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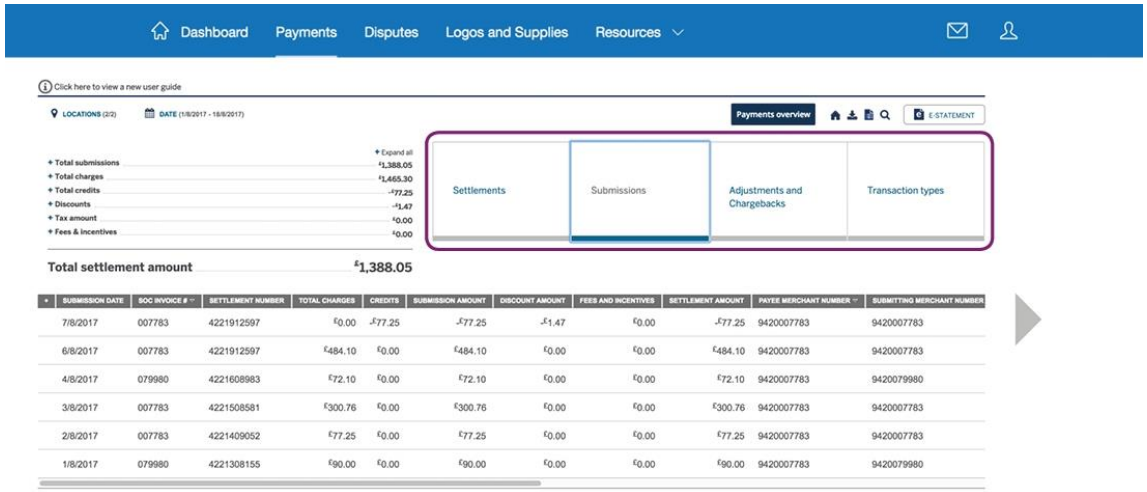
Report menu

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.



+	SUBMISSION DATE	SOC INVOICE #	SETTLEMENT NUMBER	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT	DISCOUNT AMOUNT	FEES AND INCENTIVES	SETTLEMENT AMOUNT	PAYEE MERCHANT NUMBER	SUBMITTING MERCHANT NUMBER
	7/8/2017	007783	4221912597	£0.00	-£77.25	-£77.25	-£1.47	£0.00	-£77.25	9420007783	9420007783
	6/8/2017	007783	4221912597	£484.10	£0.00	£484.10	£0.00	£0.00	£484.10	9420007783	9420007783
	4/8/2017	079980	4221608983	£72.10	£0.00	£72.10	£0.00	£0.00	£72.10	9420007783	9420079980
	3/8/2017	007783	4221508581	£300.76	£0.00	£300.76	£0.00	£0.00	£300.76	9420007783	9420007783
	2/8/2017	007783	4221409052	£77.25	£0.00	£77.25	£0.00	£0.00	£77.25	9420007783	9420007783
	1/8/2017	079980	4221308155	£90.00	£0.00	£90.00	£0.00	£0.00	£90.00	9420007783	9420079980

Payments

Learn how to manage everything to do with payments

1 2 3 4 5

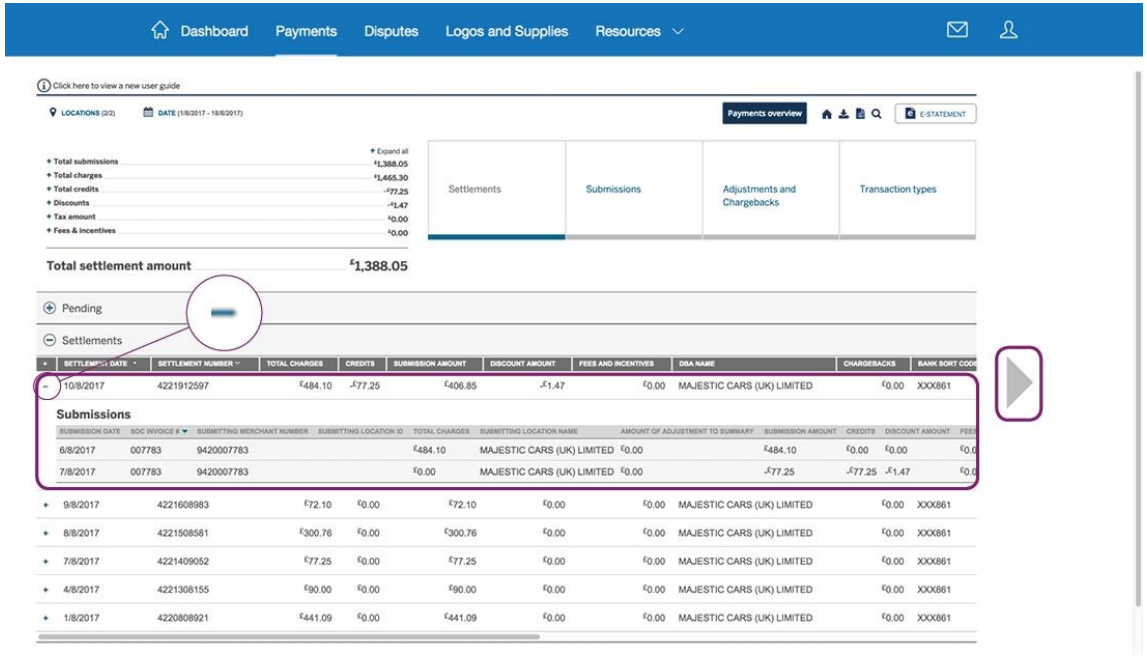
View report

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.

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.



Payments

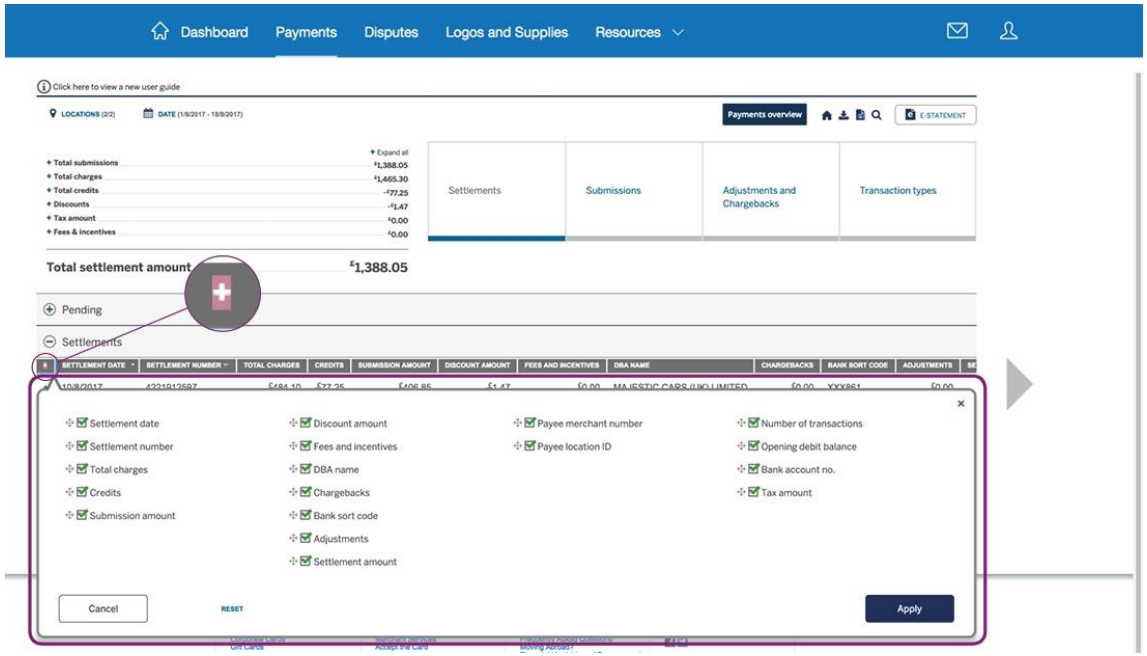
Learn how to manage everything to do with payments

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.



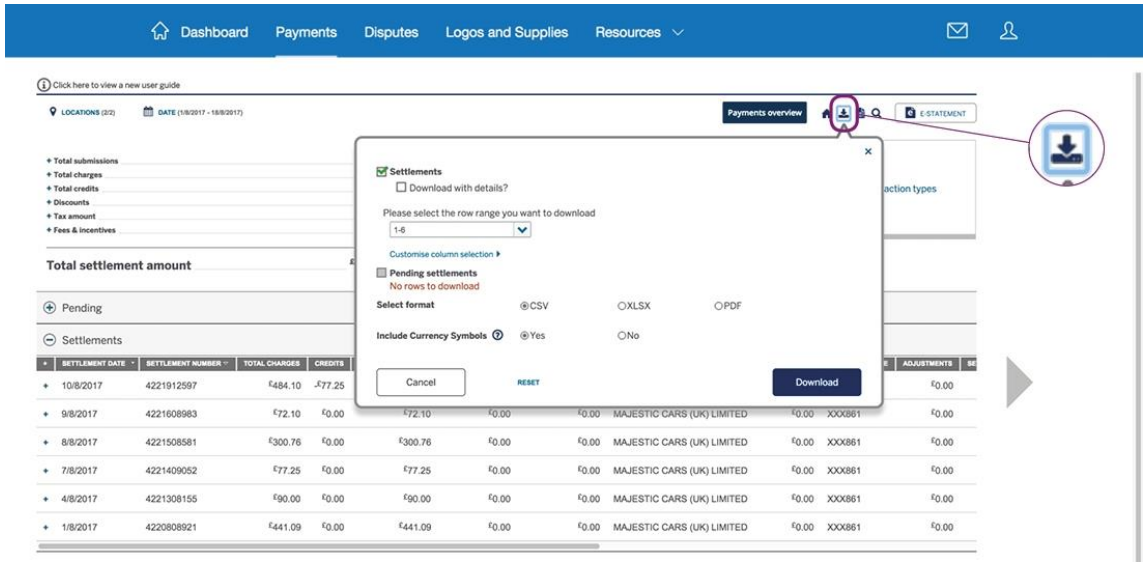
Payments

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.



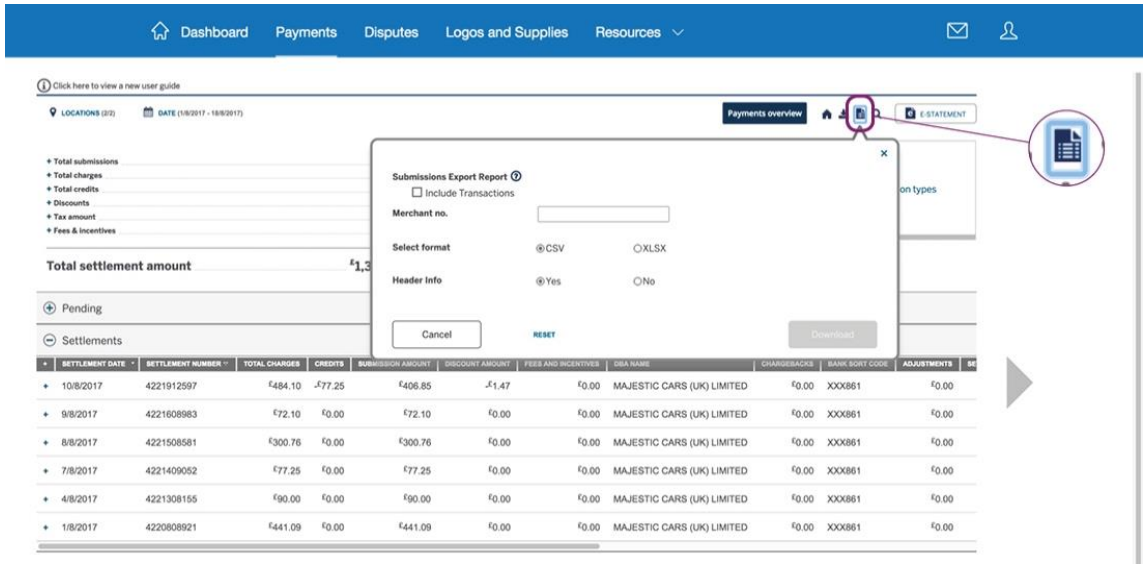
Payments

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.



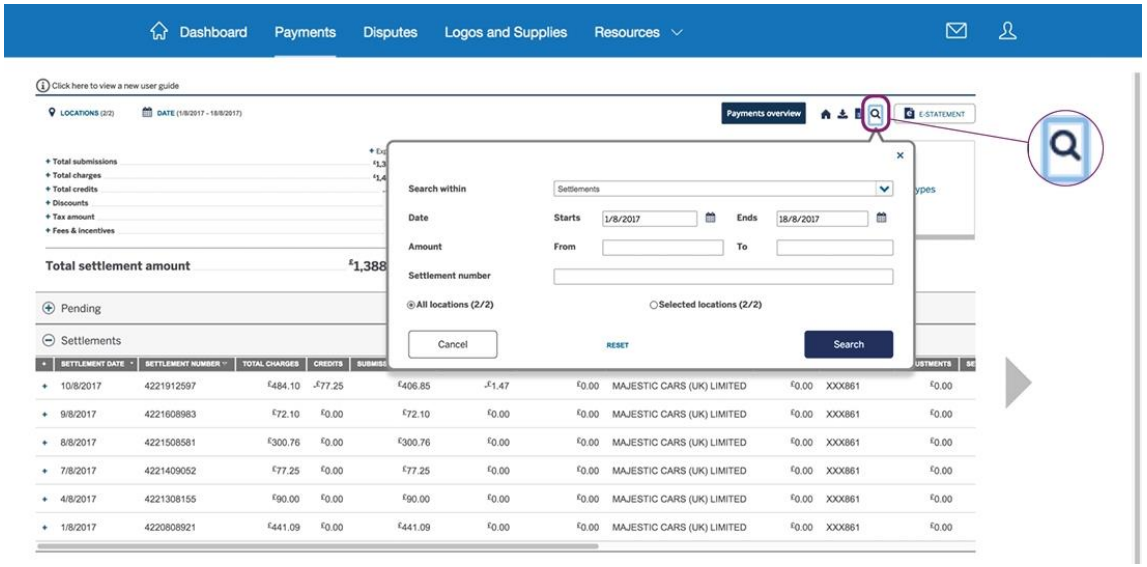
Payments

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.



Disputes

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

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

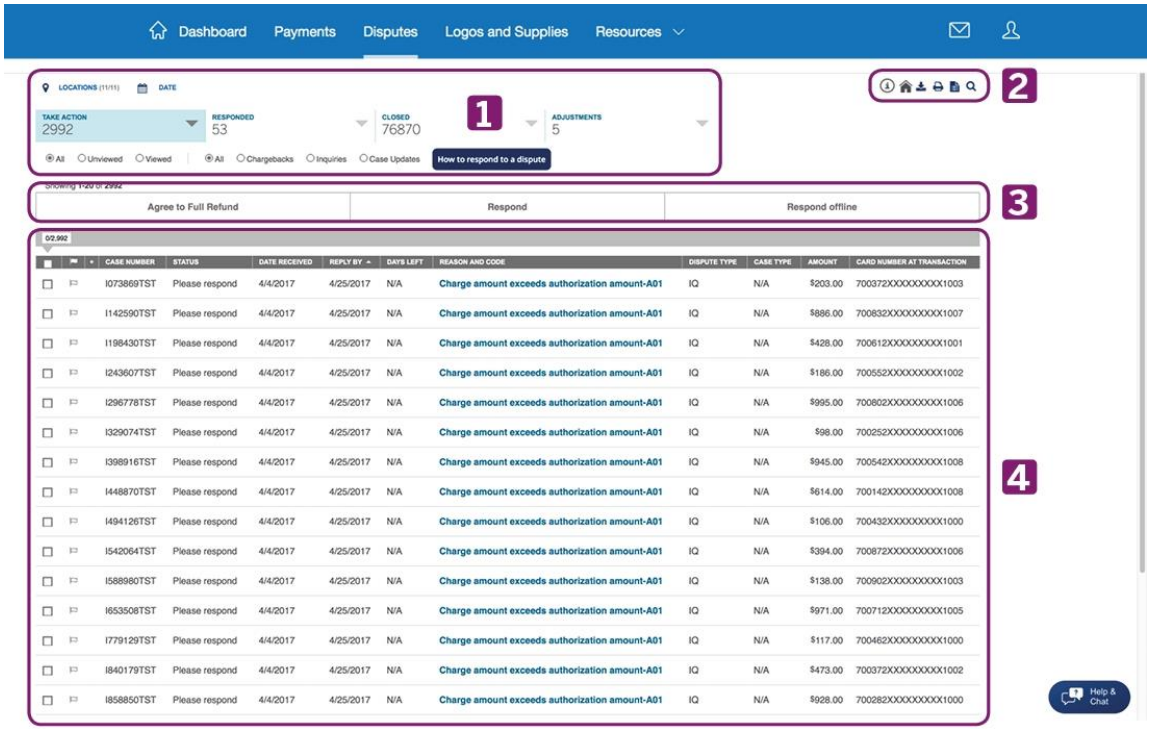
1 2 3 4

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

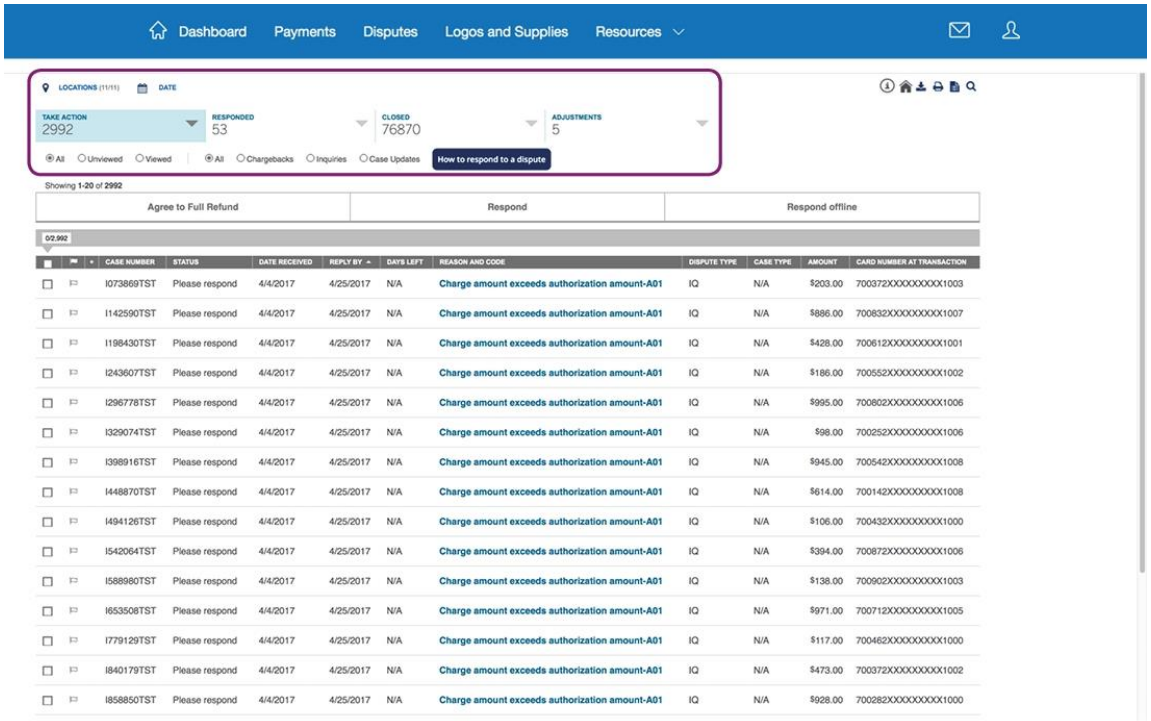


Disputes

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.



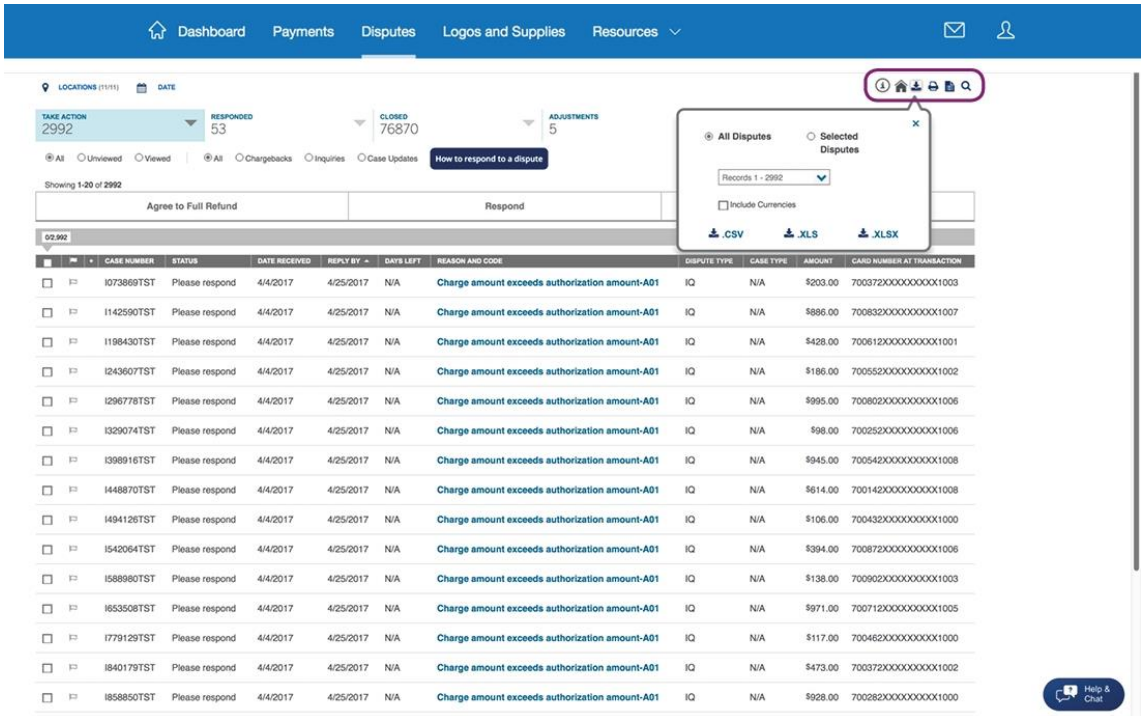
Disputes

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

1 2 3 4

Tools

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



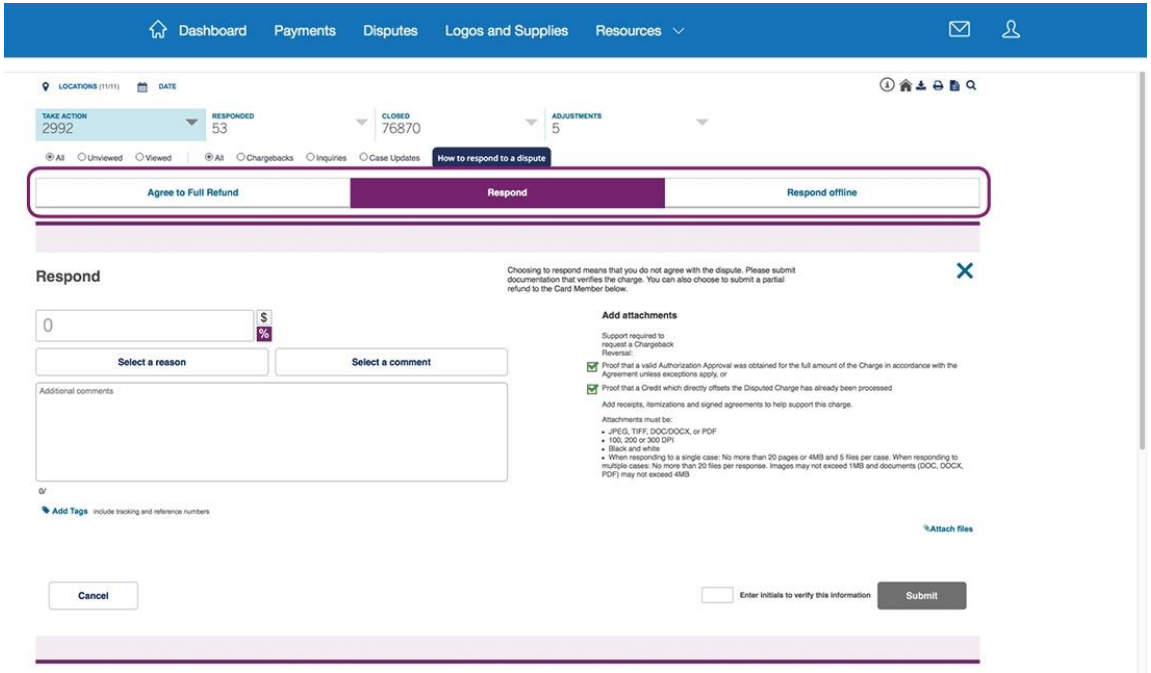
Disputes

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

1 2 3 4

Respond to us

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



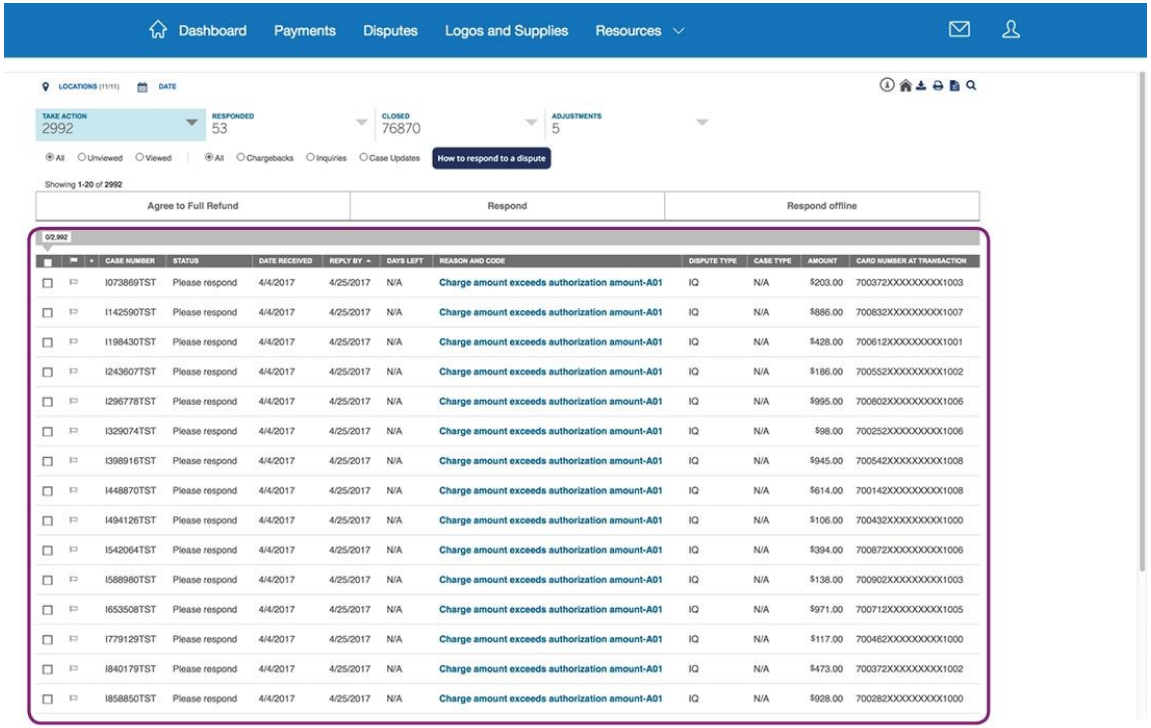
Disputes

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

1 2 3 4

Summary Report

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



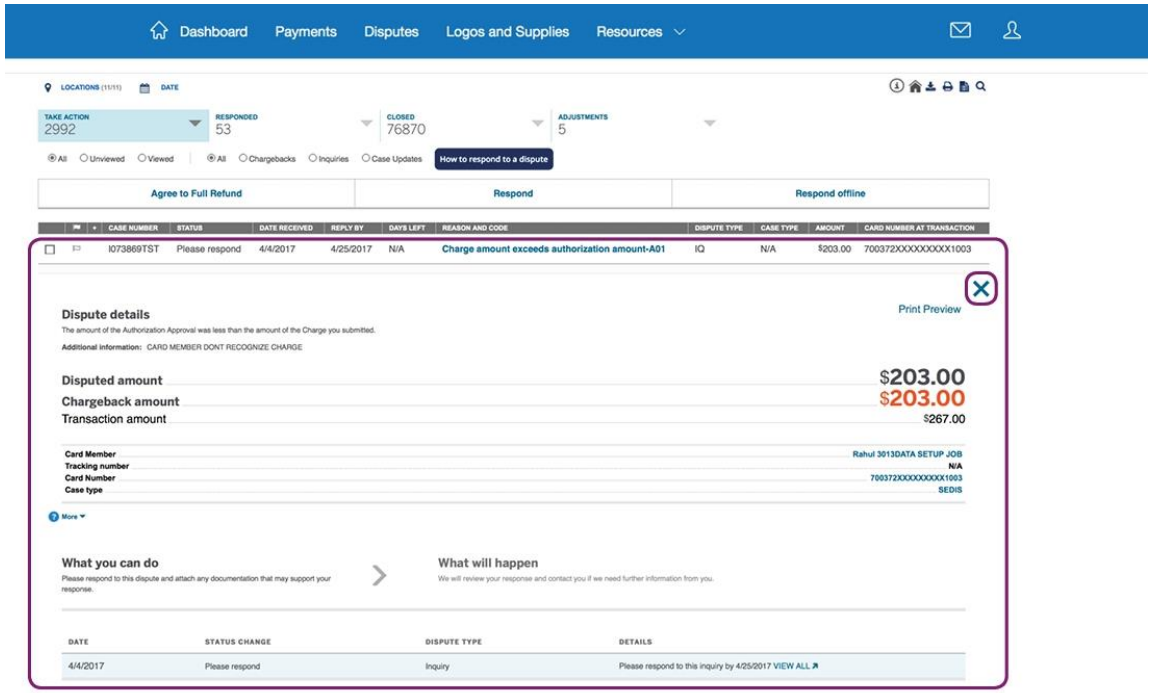
Disputes

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.



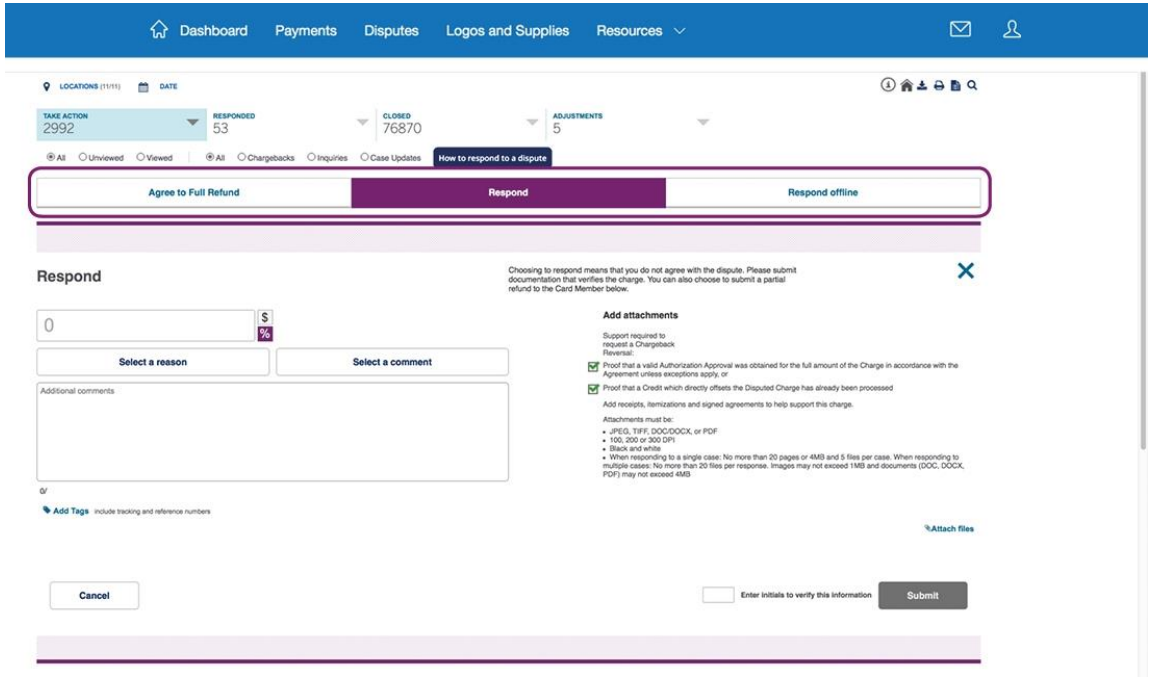
Disputes

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.



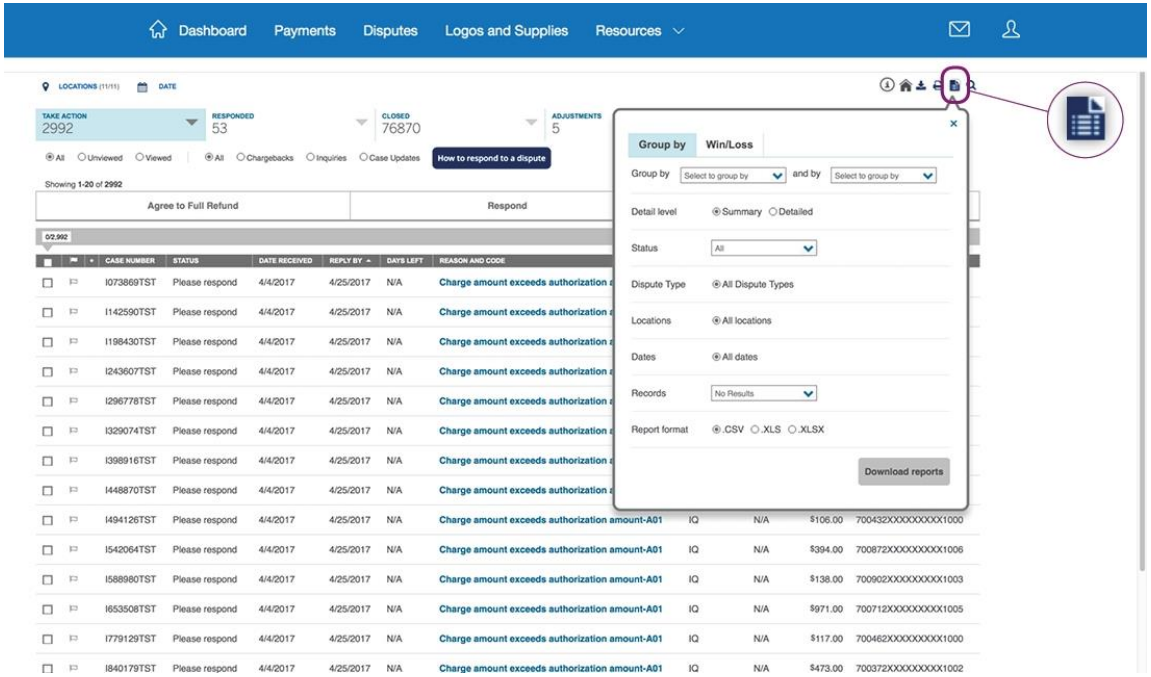
Disputes

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.



Complimentary signage

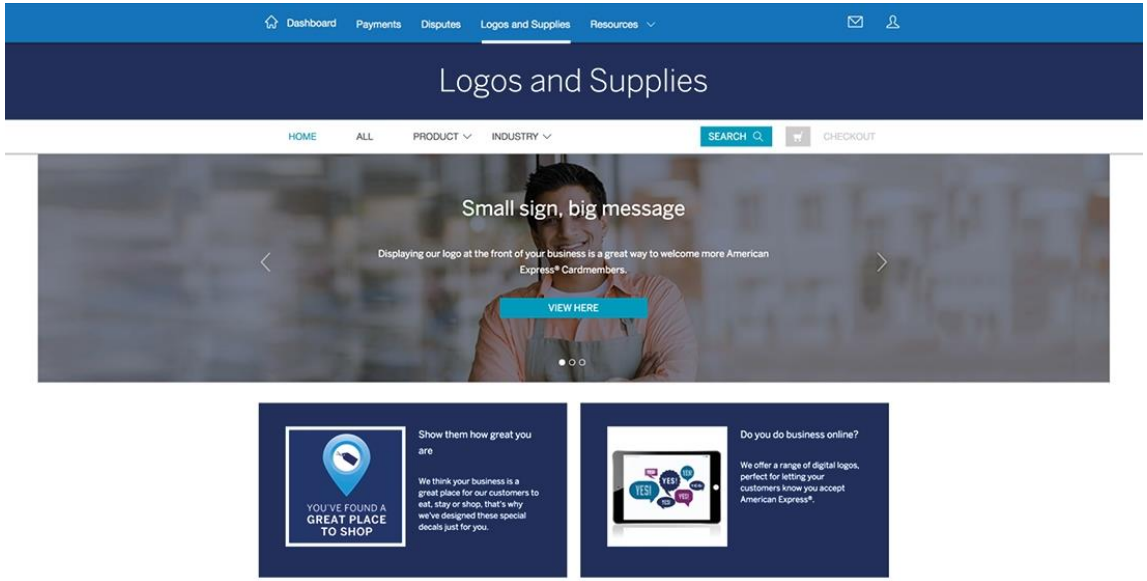
The fastest and easiest way to get merchandise and supplies for your business

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.



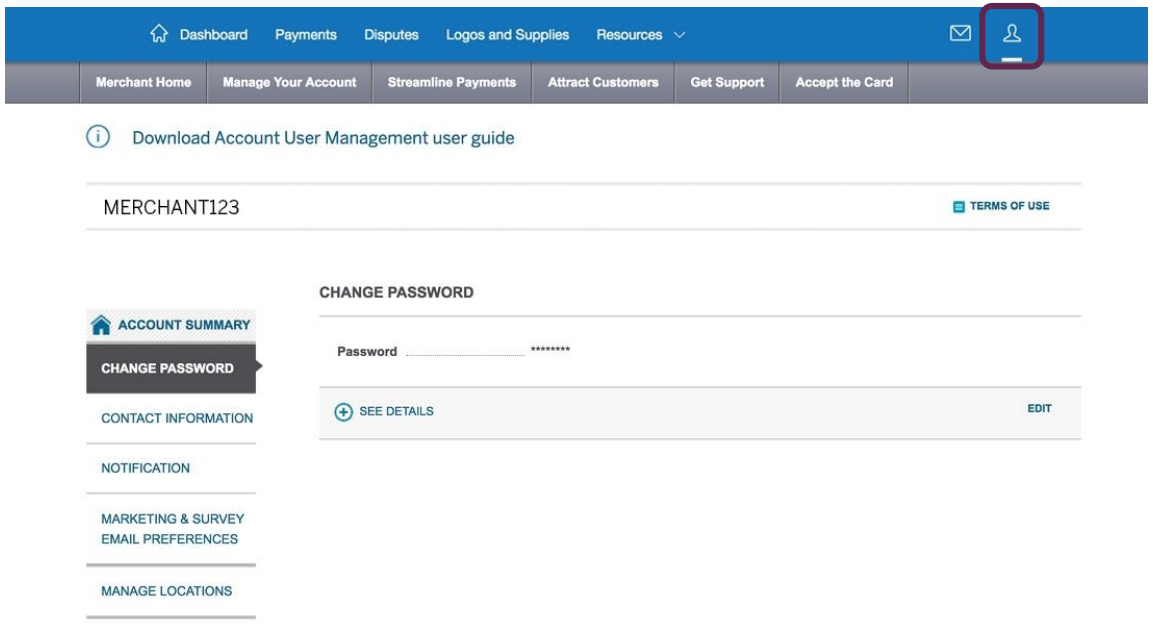
Profile and settings

Manage your profile quickly and easily

Profile and Settings

You can update your user profile and Account information by clicking Profile & Settings on the ACCOUNT DASHBOARD page. 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)



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 any of the following numbers.

EMAIL

LIVE CHAT

INTERACTIVE WALKME ASSISTANT

Call us on

0800 032 7216

(or the designated number for your Account)

Monday to Friday, 8am to 6pm

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.

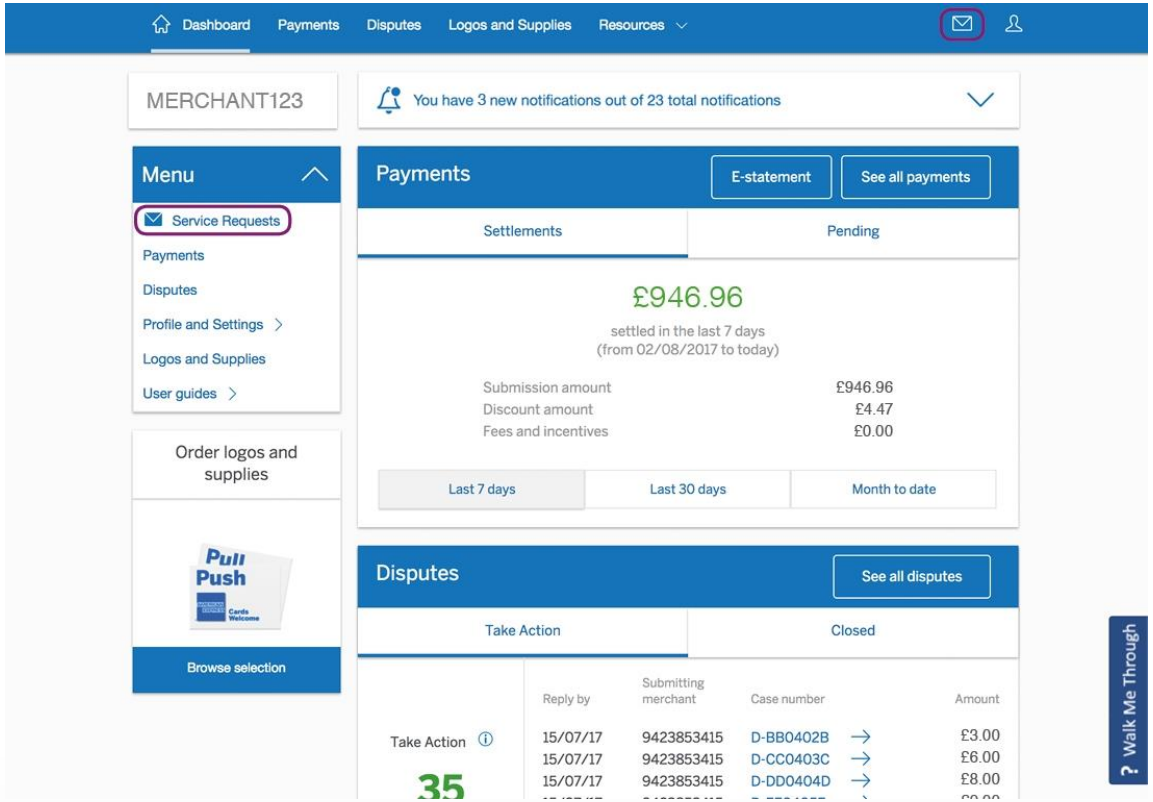
CALL US

EMAIL

Email us your questions and/or requests through the Secure Message Centre.

LIVE CHAT

INTERACTIVE WALKME ASSISTANT



Get help

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

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

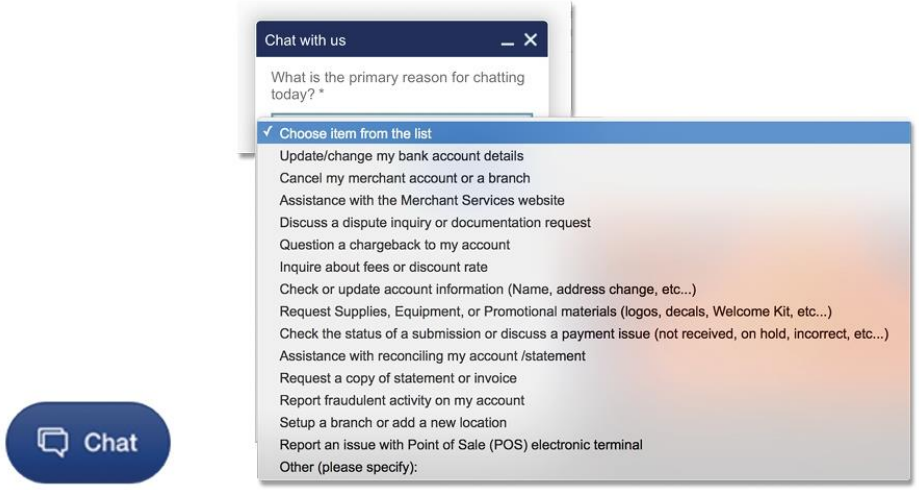
CALL US

EMAIL

LIVE CHAT

Open a Live Chat with ustomer Service whenever you see this these icons. Available Mon- Fri 8am-6pm, Sat 9am to 5pm

INTERACTIVE WALKME ASSISTANT



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.

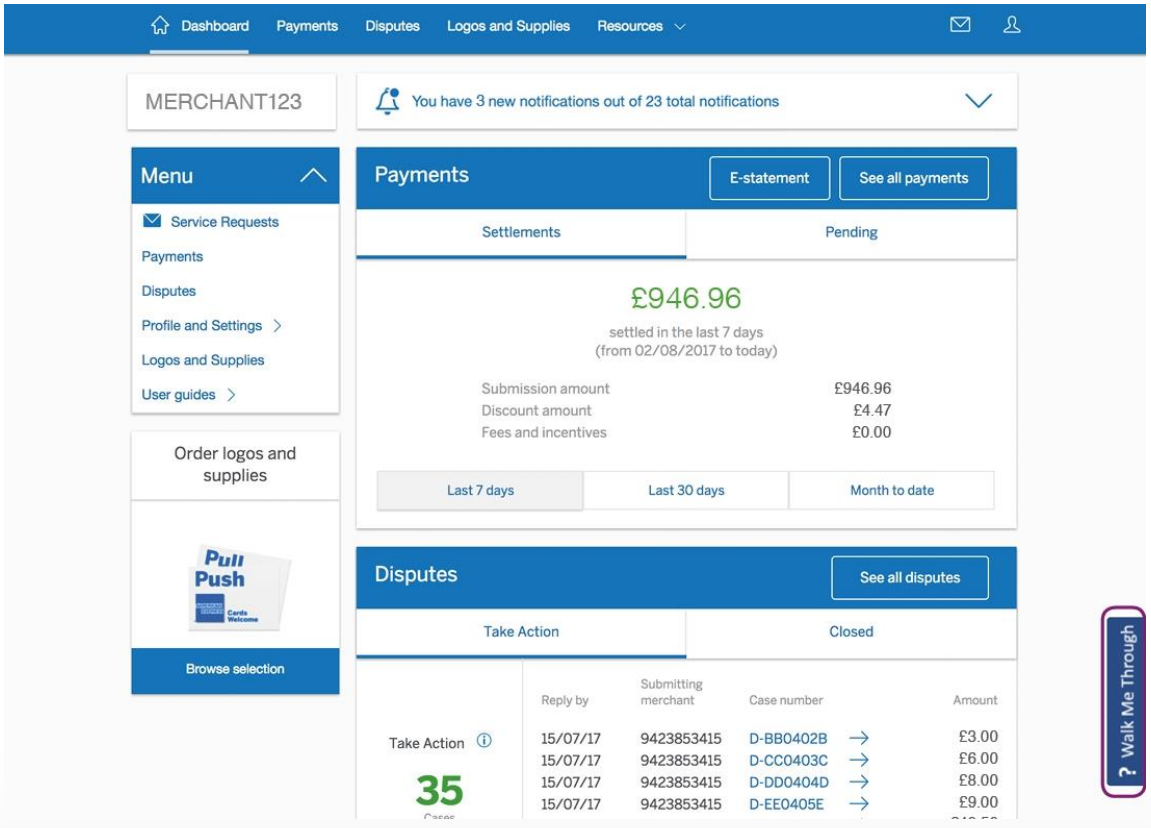
CALL US

EMAIL

LIVE CHAT

INTERACTIVE WALKME ASSISTANT

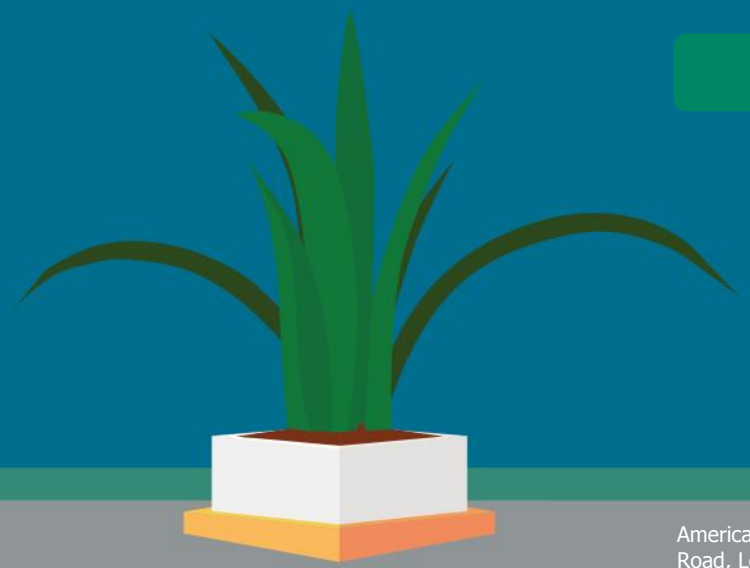
Click this to launch the Help Menu. Choose the topic you need help with and WalkMe will prompt you what to do next.



Congratulations!

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

LOG IN



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