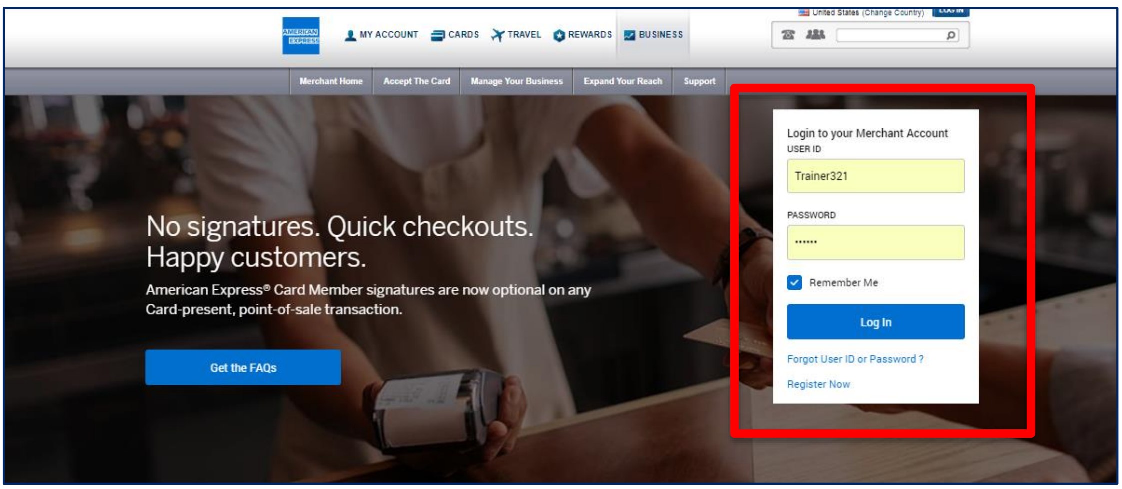
NEW Account Services Hub

Overview

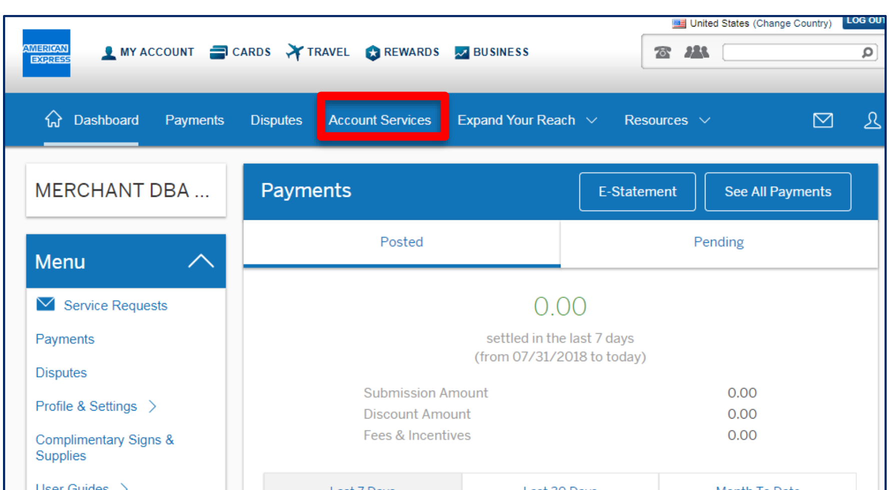
Welcome to the new Merchant Site Account Services experience. This experience allows you to perform key account maintenance tasks and update your account without needing to call to speak to a Customer Care Professional or submitting a servicing request through the Secure Message Center. This User Guide will help you navigate through the experience. If you have further questions or feedback, please don't hesitate to reach out to your Client Manager.

Accessing the Account Servicing page

1. Log in from the homepage with your User ID and Password.



2. You will land on the Account Dashboard page. Click on 'Account Services' in the blue navigation bar at the top.



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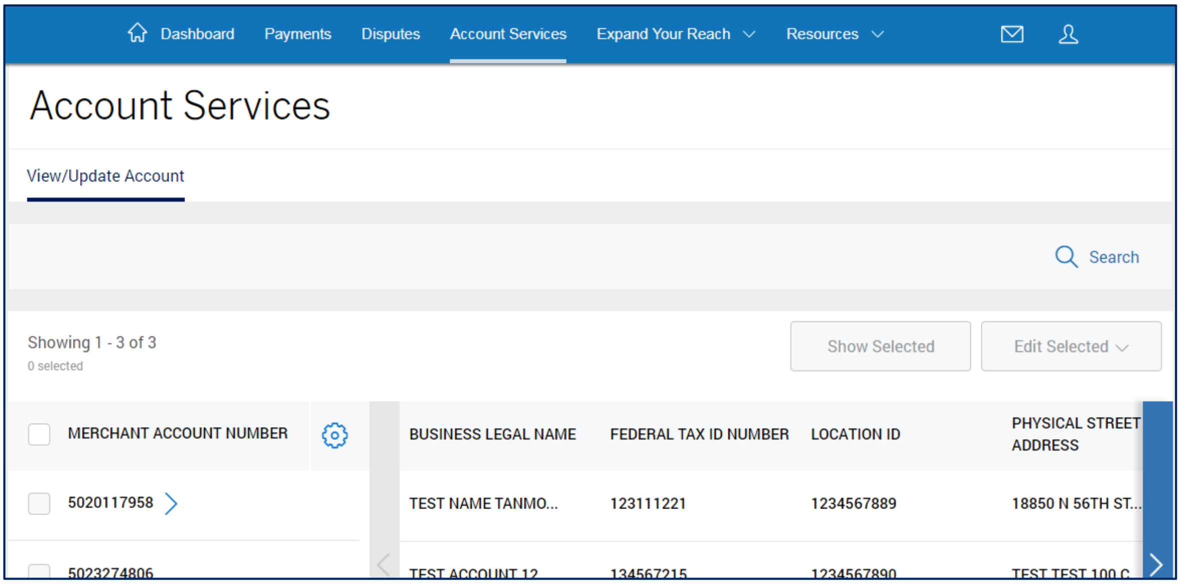
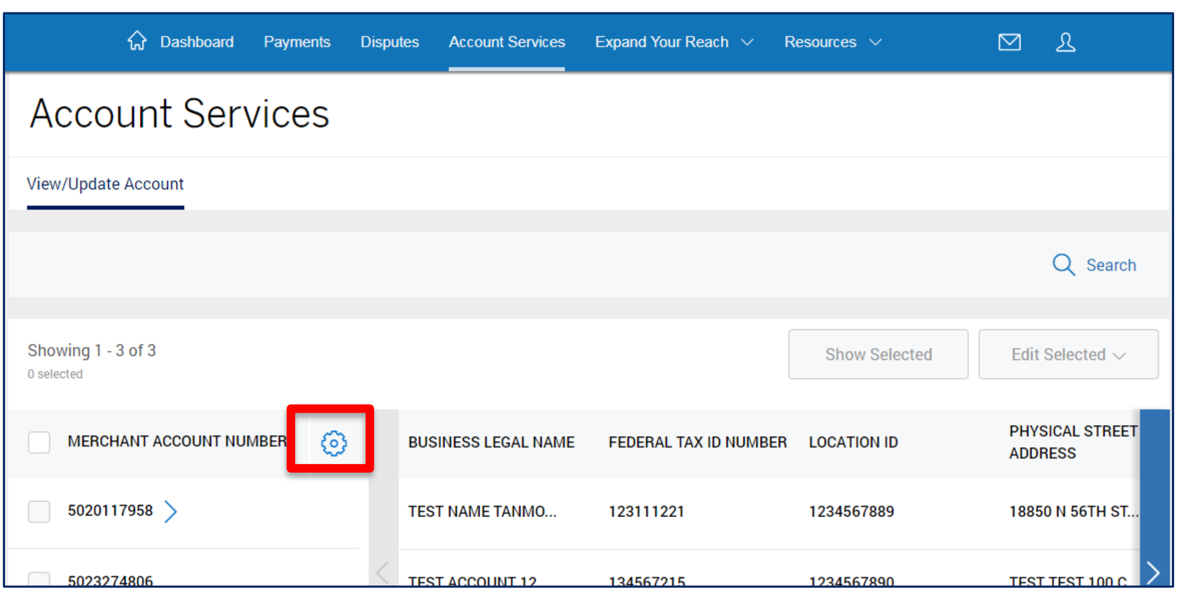
3. You’ll come to the new Account Services Page where you can view/update any of your online accounts.



Customizing your Account Services View

1. Click the gear icon on the left-hand side to customize the columns that appear in your Account Services View.



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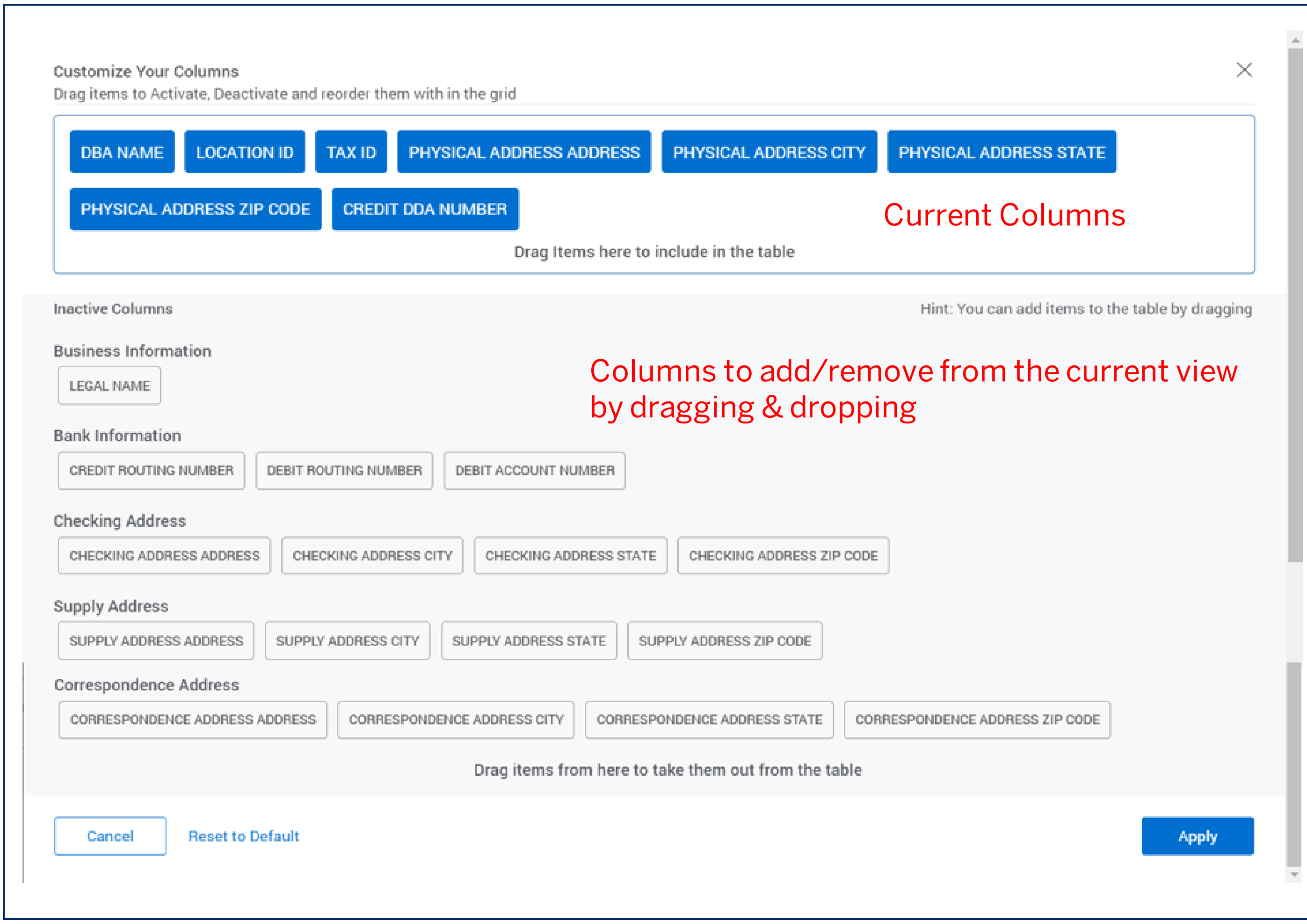
2. A **"Customize your Columns"** overlay will appear with the current columns shown. You can drag column names in and out of the overlay to add/remove columns from your view. You can also rearrange the columns within the overlay to change the order they appear on the page.



Once you have customized the columns to your preference, click Apply in the bottom right. These preferences will be saved and will be displayed for future logins.

Note These preferences are unique at the user level. Each individual user can customize their own view.

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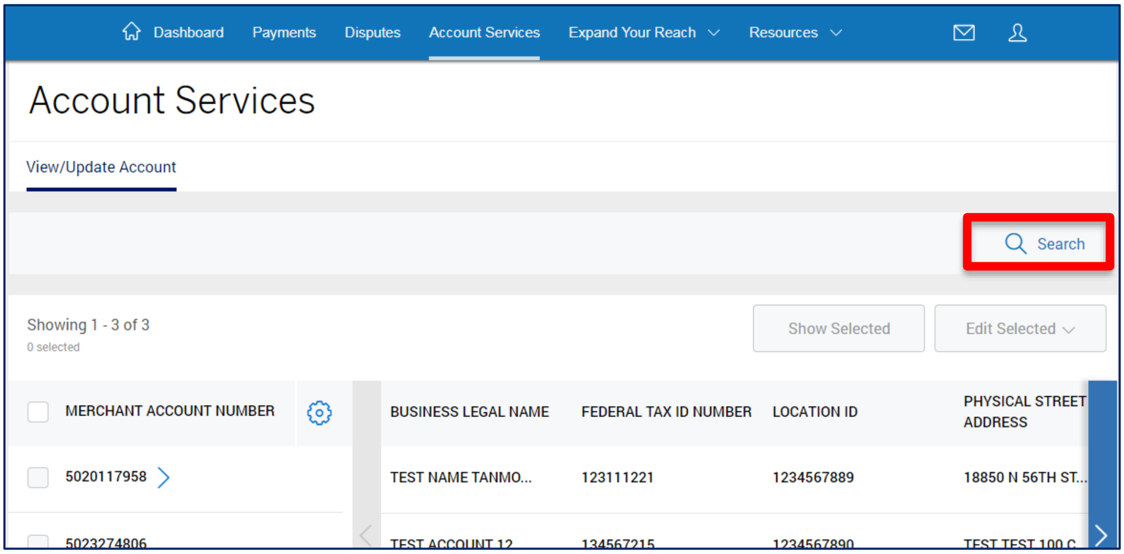
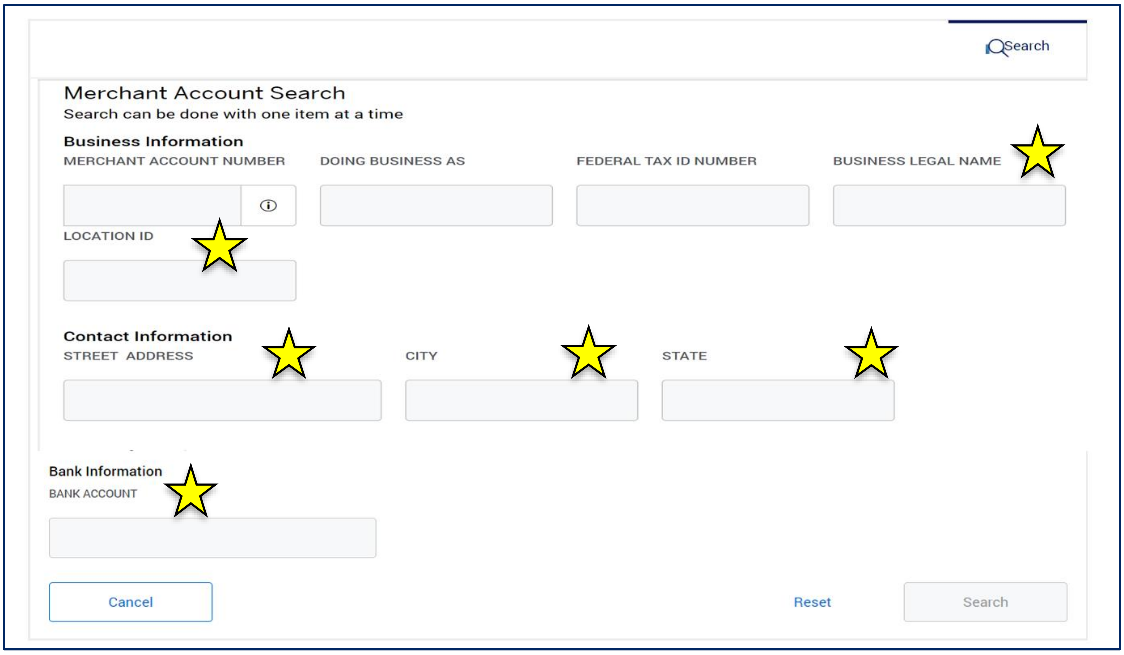
Searching your Account Services View

1. You can search for a specific account by clicking on the Search magnifying glass



2. Search by any of the fields below. In addition to the past search options, we have added the ability to search by Business Legal Name, Location ID, Contact Information (street address, city and state) and Bank Account Number.



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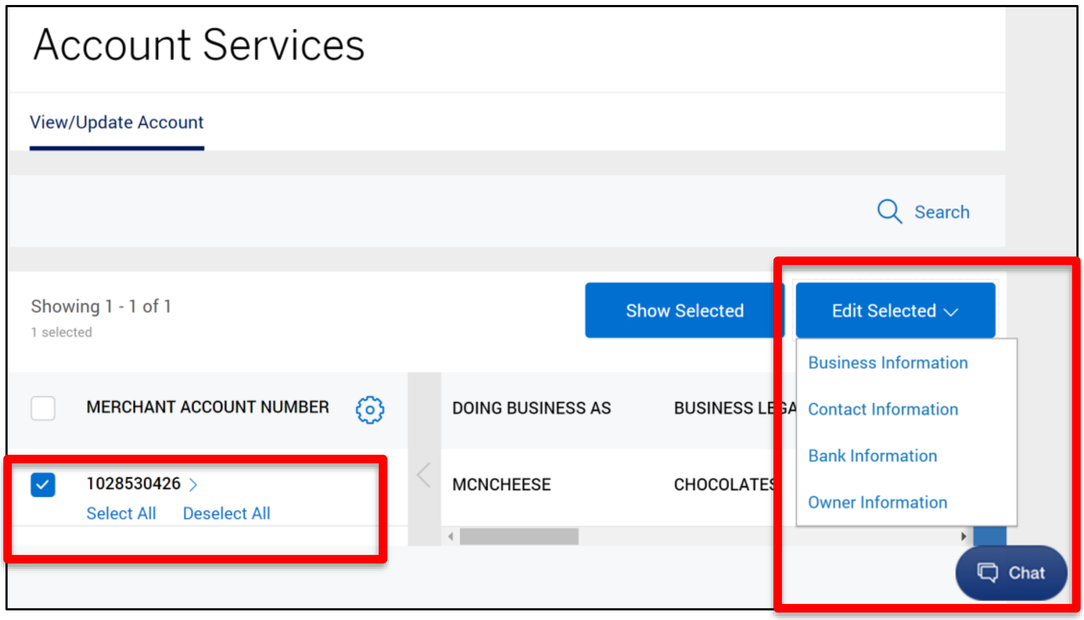
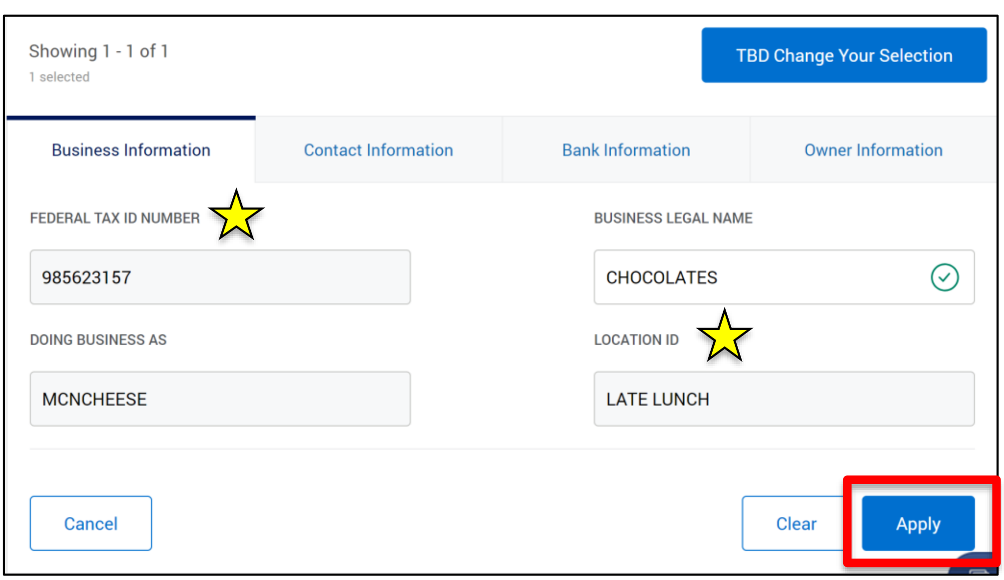
Editing your Accounts – Single Account

You can edit one account at a time with the single edit option. Select the account that you wish to update information and click on the edit selected button. A drop down menu will appear as you see below. Select the appropriate option and the details for that option will appear.



1. Below are the fields you can edit in the “Business Information” tab on your own now. Location ID and Federal Tax ID number are new fields that have been added. Once you make edits, click Apply.



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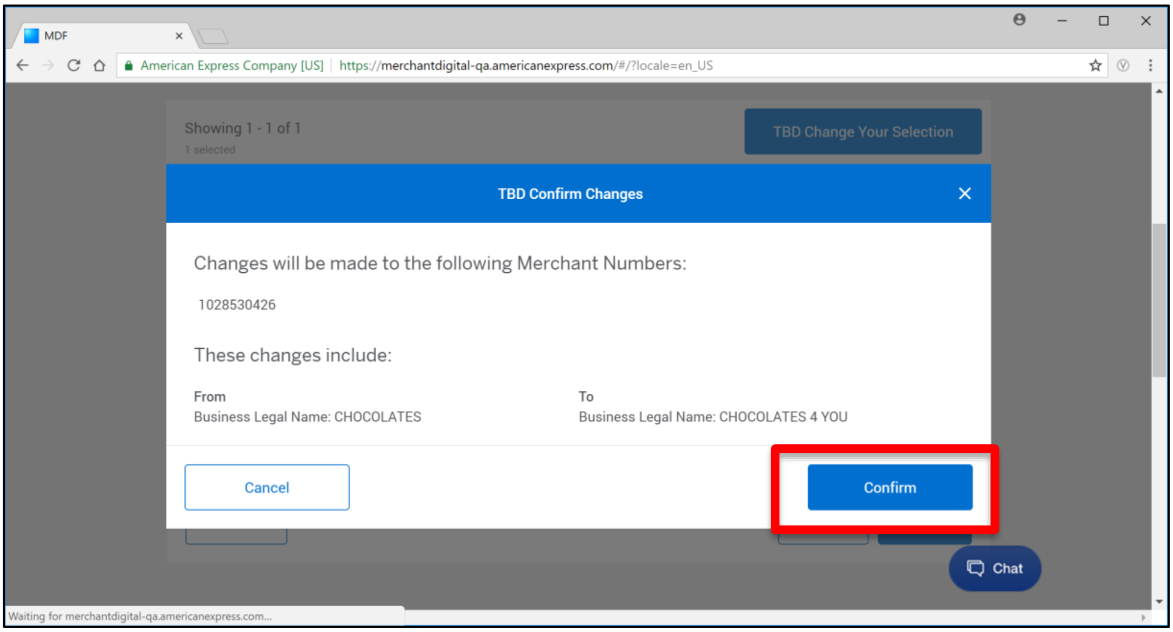
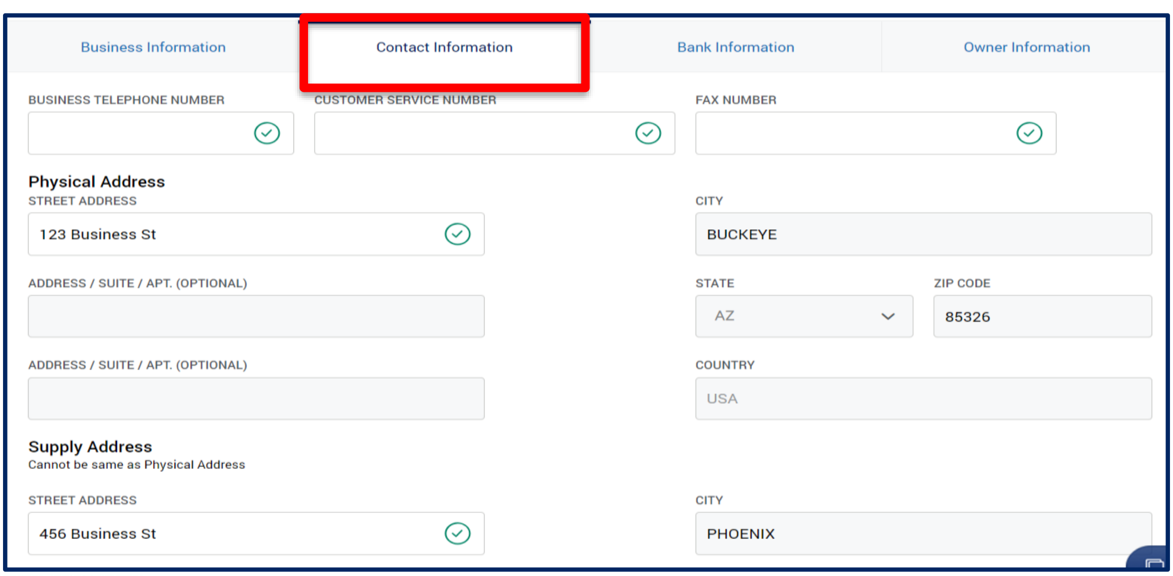
2. A confirmation box will appear indicating what is currently listed on the account and what you are updating the information to. If the information is accurate, select “Confirm.” These changes will be saved, and you will get a confirmation email to the email address on file.



Steps 1-2 can be repeated for all 4 tabs when you are editing account information. Here are snapshots of the other tabs.

<u>Contact Information Tab:</u> You can edit Business Telephone Number, Customer Service Number, Fax Number, Physical Address, Supply Address, Payment Address & Correspondence Address



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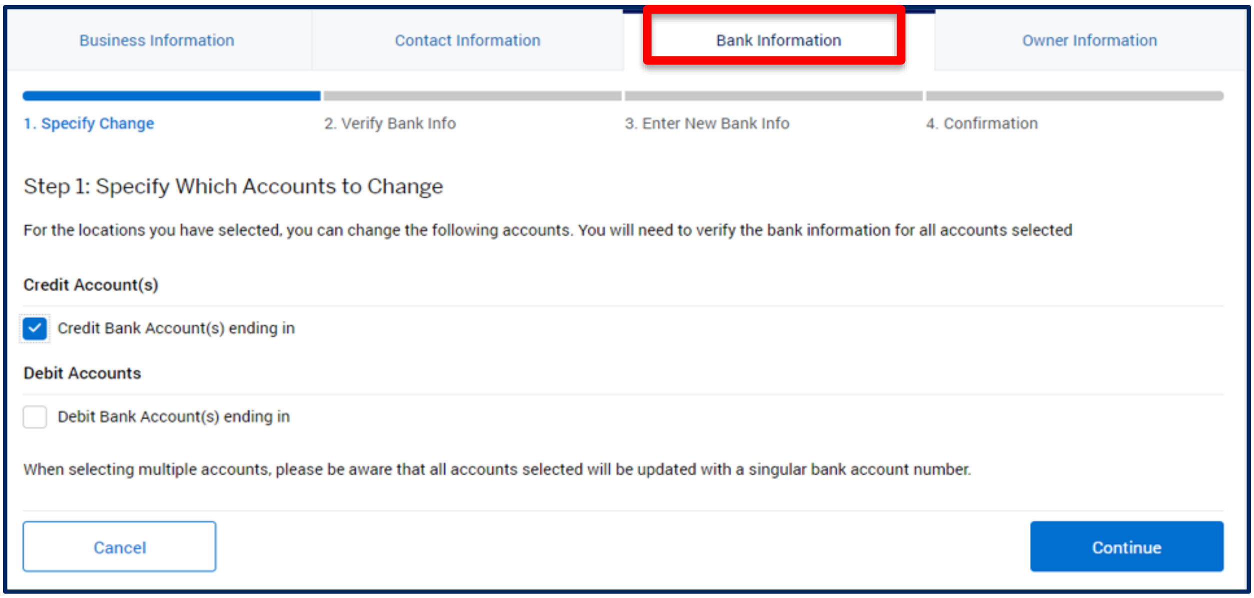
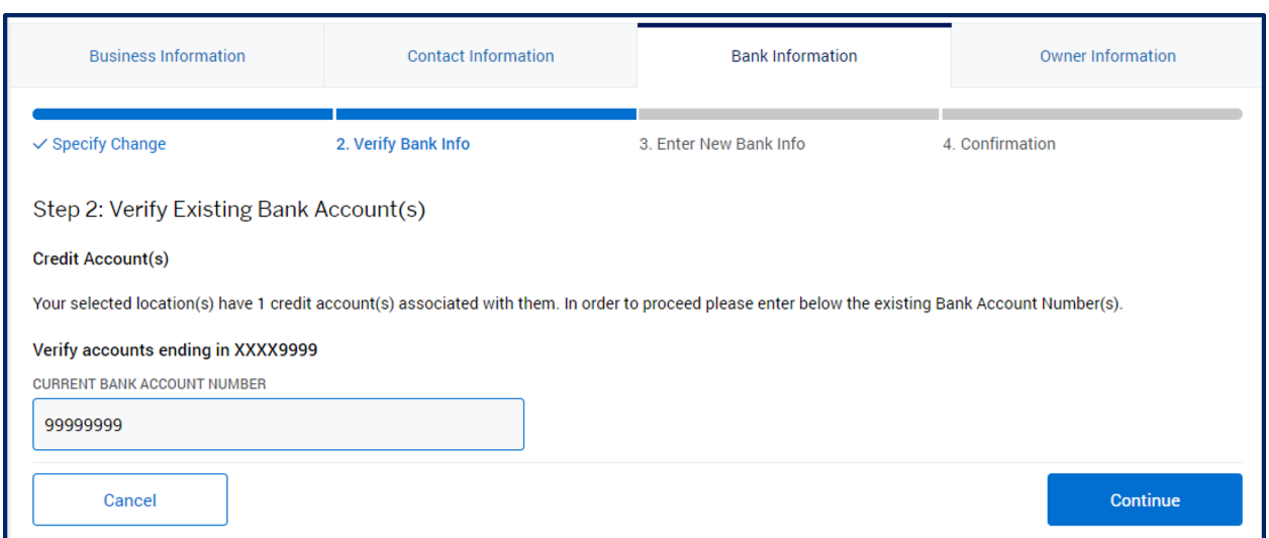
<u>Bank Information Tab</u>: We recognize updating your bank information was not the most easy or transparent task in the past. That is why we worked hard to improve this experience in the Account Services Hub. **Here are the steps to take to update your banking information.**

1. Specify Change– you can either edit your Credit or Debit Account(s). Please be aware that when you select multiple locations to update their banking information, all of them will be update with this singular bank account number. Click "Continue"



2. Verify Bank Info – to change the account, you must first verify your existing account number. Then click "Continue"



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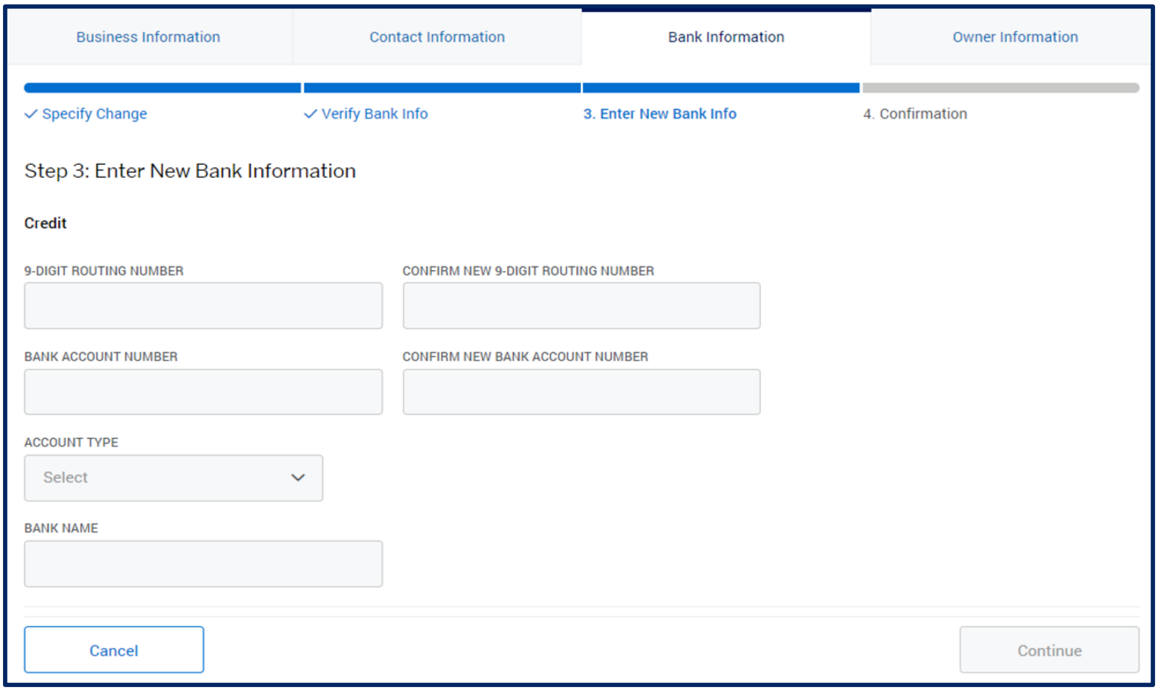
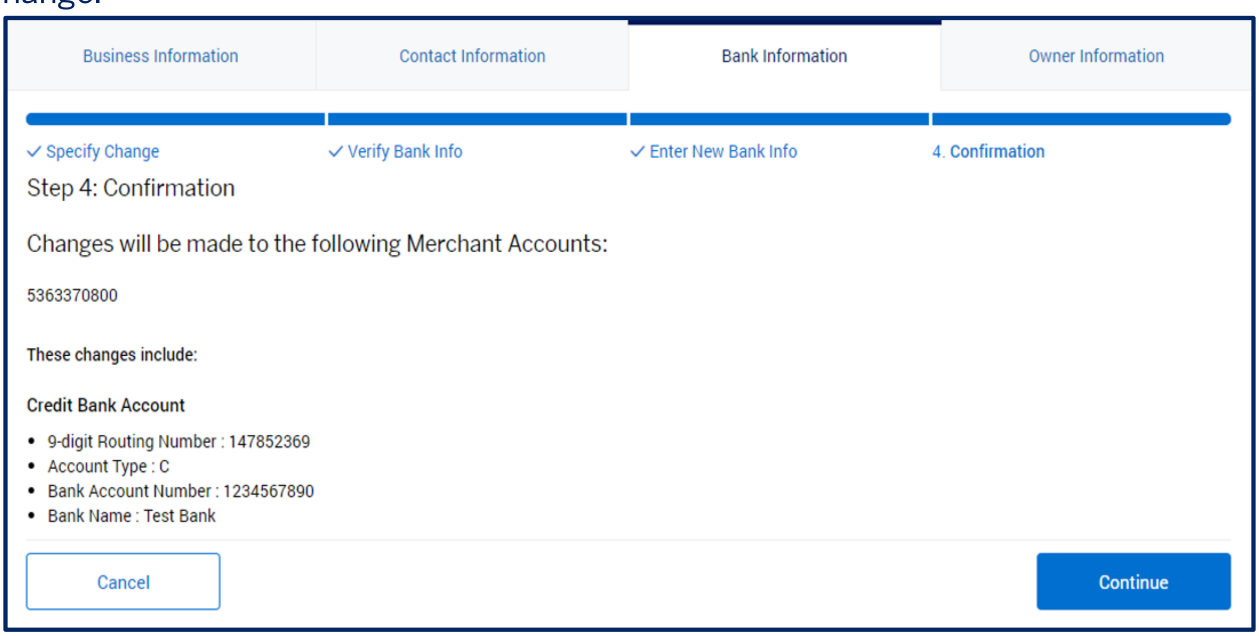
3. Enter New Bank Info– once you verify your existing Bank Account Number, enter in your new Bank information including Routing Number, Bank Account Number, Account Type and Bank Name. Click "Continue"



4. Confirmation– review updated information and click "Continue. Your changes will be saved and a green message on the next page will confirm you have completed the change.



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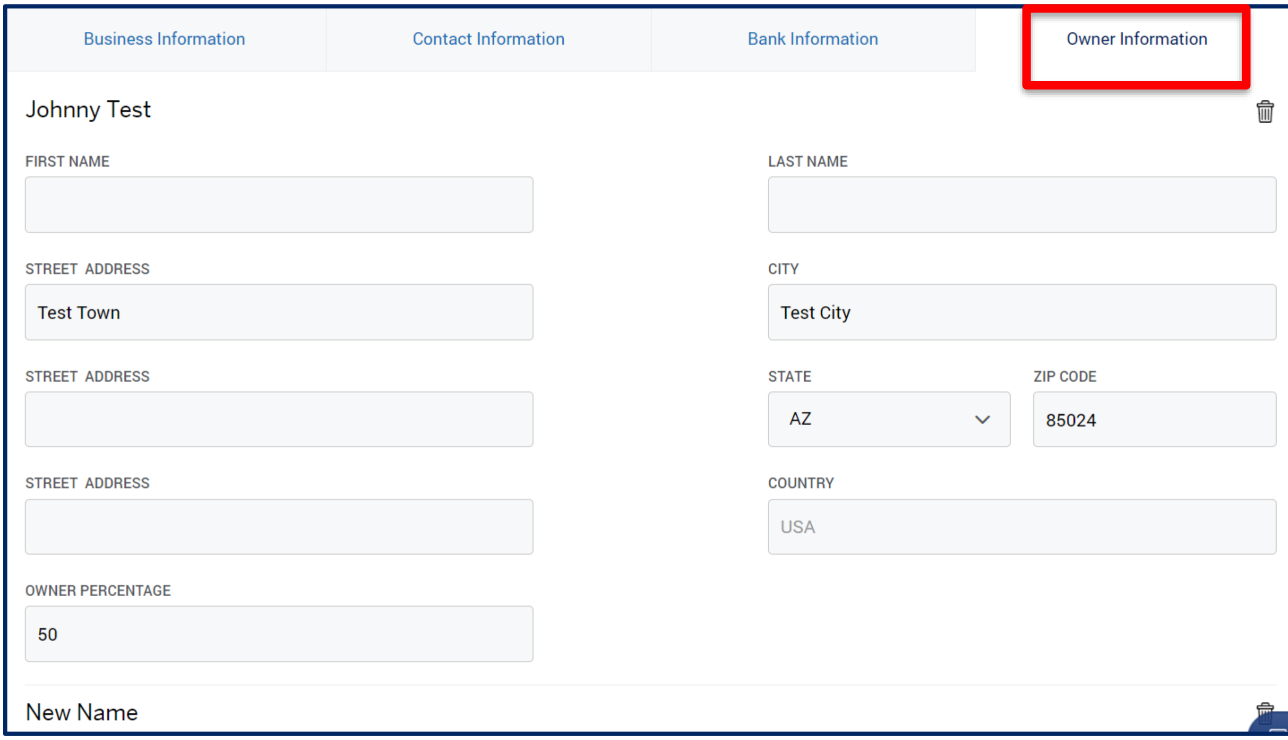
Ownership Information Tab: You can edit Owner Name, Address, Telephone, etc. You can add multiple owners as well.



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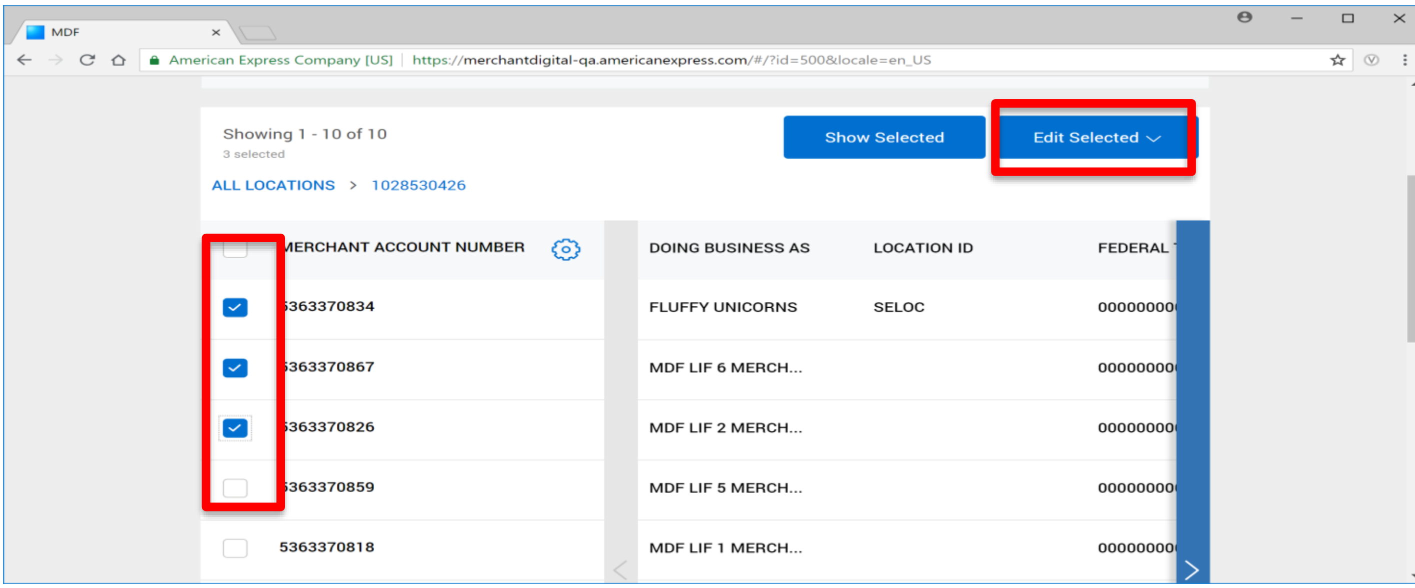
Editing your Accounts – Multiple Accounts

Multiple accounts can be edited simultaneously by selecting each of the individual accounts you want to update and clicking "Edit Selected" and choose appropriate option from drop down. A few things to note when performing a multiple account edit:

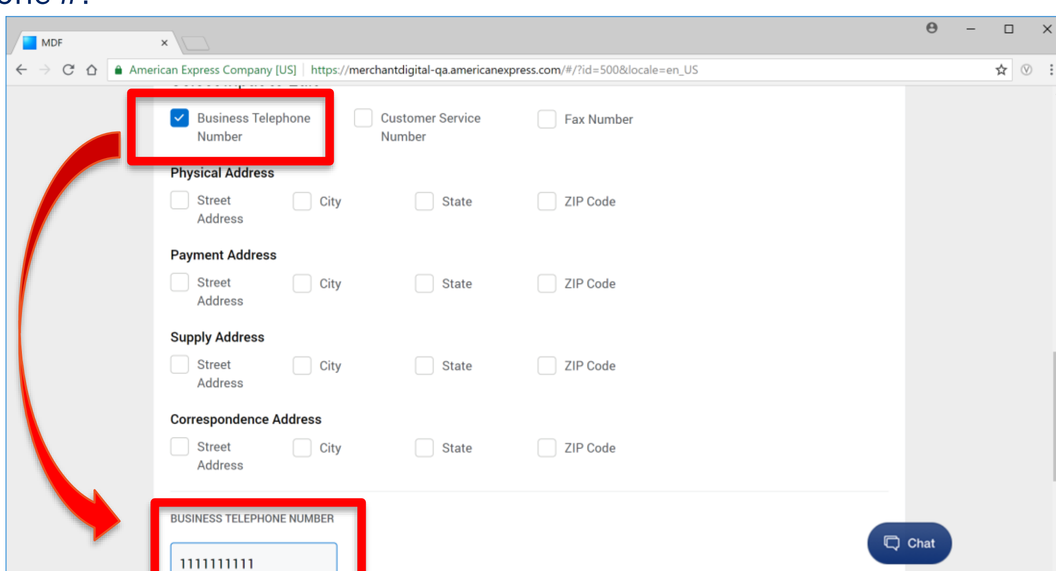
- The same type of information must be edited for all selected accounts
- Any new information added must be the same for all selected accounts



For example, say you want to make an update on the Contact Information tab – specifically the Business Telephone #:

Check the Business Telephone Number box, make the changes in the field below and then click "Apply."

All selected locations will be updated.



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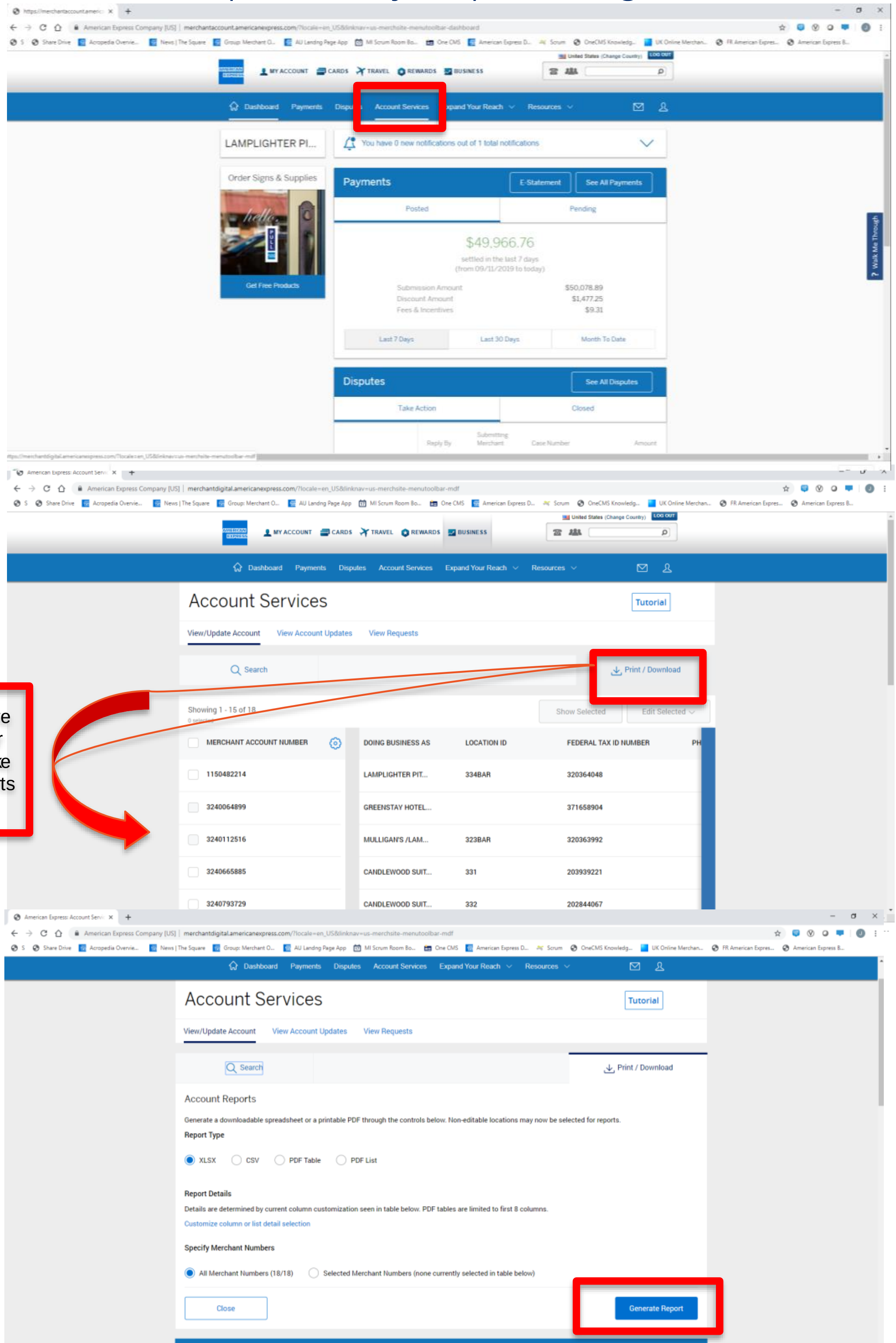
Downloading/Printing Reports

You are able to download and print a variety of reports through account services.



Choose respective account number that you would like to generate reports for