

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.

United States (Change Country) LOG OUT

MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

Merchant Home Accept The Card Manage Your Business Expand Your Reach Support

No signatures. Quick checkouts.
Happy customers.

American Express® Card Member signatures are now optional on any Card-present, point-of-sale transaction.

Get the FAQs

Login to your Merchant Account

USER ID
Trainer321

PASSWORD

☒ Remember Me

Log In

[Forgot User ID or Password ?](#)

[Register Now](#)

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

United States (Change Country) LOG OUT

MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

Dashboard Payments Disputes **Account Services** Expand Your Reach Resources

MERCHANT DBA ...

Menu

- Service Requests
- Payments
- Disputes
- Profile & Settings >
- Complimentary Signs & Supplies
- User Guides >

Payments

E-Statement See All Payments

Posted Pending

0.00

settled in the last 7 days
(from 07/31/2018 to today)

| | |
|-------------------|------|
| Submission Amount | 0.00 |
| Discount Amount | 0.00 |
| Fees & Incentives | 0.00 |

Last 7 Days Last 30 Days Month To Date

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

| <input type="checkbox"/> MERCHANT ACCOUNT NUMBER | BUSINESS LEGAL NAME | FEDERAL TAX ID NUMBER | LOCATION ID | PHYSICAL STREET ADDRESS |
|--------------------------------------------------|---------------------|-----------------------|-------------|-------------------------|
| <input type="checkbox"/> 5020117958 | TEST NAME TANMO... | 123111221 | 1234567889 | 18850 N 56TH ST... |
| <input type="checkbox"/> 5023274806 | TEST ACCOUNT 12 | 134567215 | 1234567890 | TEST TEST 100 C |

Customizing your Account Services View

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

| <input type="checkbox"/> MERCHANT ACCOUNT NUMBER | BUSINESS LEGAL NAME | FEDERAL TAX ID NUMBER | LOCATION ID | PHYSICAL STREET ADDRESS |
|--------------------------------------------------|---------------------|-----------------------|-------------|-------------------------|
| <input type="checkbox"/> 5020117958 | TEST NAME TANMO... | 123111221 | 1234567889 | 18850 N 56TH ST... |
| <input type="checkbox"/> 5023274806 | TEST ACCOUNT 12 | 134567215 | 1234567890 | TEST TEST 100 C |

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- 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.

Customize Your Columns

Drag items to Activate, Deactivate and reorder them with in the grid

DBA NAME

LOCATION ID

TAX ID

PHYSICAL ADDRESS ADDRESS

PHYSICAL ADDRESS CITY

PHYSICAL ADDRESS STATE

PHYSICAL ADDRESS ZIP CODE

CREDIT DDA NUMBER

Current Columns

Drag Items here to include in the table

Inactive Columns

Hint: You can add items to the table by dragging

Business Information

LEGAL NAME

Bank Information

CREDIT ROUTING NUMBER

DEBIT ROUTING NUMBER

DEBIT ACCOUNT NUMBER

Checking Address

CHECKING ADDRESS ADDRESS

CHECKING ADDRESS CITY

CHECKING ADDRESS STATE

CHECKING ADDRESS ZIP CODE

Supply Address

SUPPLY ADDRESS ADDRESS

SUPPLY ADDRESS CITY

SUPPLY ADDRESS STATE

SUPPLY ADDRESS ZIP CODE

Correspondence Address

CORRESPONDENCE ADDRESS ADDRESS

CORRESPONDENCE ADDRESS CITY

CORRESPONDENCE ADDRESS STATE

CORRESPONDENCE ADDRESS ZIP CODE

Columns to add/remove from the current view by dragging & dropping

Drag items from here to take them out from the table

Cancel

Reset to Default

Apply

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

The screenshot shows the 'Account Services' section of the dashboard. At the top, there's a navigation bar with links to Dashboard, Payments, Disputes, Account Services (active), Expand Your Reach, and Resources. Below the navigation bar, the 'Account Services' title is displayed. Underneath, there's a 'View/Update Account' link. A search bar with a magnifying glass icon and the word 'Search' is highlighted with a red box. Below the search bar, it says 'Showing 1 - 3 of 3' and '0 selected'. There are two buttons: 'Show Selected' and 'Edit Selected'. A table of accounts is displayed with columns: MERCHANT ACCOUNT NUMBER, BUSINESS LEGAL NAME, FEDERAL TAX ID NUMBER, LOCATION ID, and PHYSICAL STREET ADDRESS. The first row shows '5020117958' and 'TEST NAME TANMO...'. The second row shows '5023274806' and 'TEST ACCOUNT 12'.

| MERCHANT ACCOUNT NUMBER | BUSINESS LEGAL NAME | FEDERAL TAX ID NUMBER | LOCATION ID | PHYSICAL STREET ADDRESS |
|-------------------------|---------------------|-----------------------|-------------|-------------------------|
| 5020117958 | TEST NAME TANMO... | 123111221 | 1234567889 | 18850 N 56TH ST... |
| 5023274806 | TEST ACCOUNT 12 | 134567215 | 1234567890 | TEST TEST 100 C |

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.

The screenshot shows the 'Merchant Account Search' form. It has a search bar at the top right. Below the search bar, it says 'Search can be done with one item at a time'. The form is divided into three sections: Business Information, Contact Information, and Bank Information. Each section has a yellow star next to it, indicating that these fields are searchable. The Business Information section includes Merchant Account Number, Doing Business As, Federal Tax ID Number, and Business Legal Name. The Contact Information section includes Street Address, City, and State. The Bank Information section includes Bank Account. At the bottom, there are buttons for 'Cancel', 'Reset', and 'Search'.

Merchant Account Search
Search can be done with one item at a time

Business Information

MERCHANT ACCOUNT NUMBER DOING BUSINESS AS FEDERAL TAX ID NUMBER BUSINESS LEGAL NAME

LOCATION ID

Contact Information

STREET ADDRESS CITY STATE

Bank Information

BANK ACCOUNT

Cancel Reset Search

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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.

The screenshot shows the 'Account Services' interface. At the top, there's a 'View/Update Account' tab. Below it, a search bar and a 'Showing 1 - 1 of 1' indicator are present. A table lists accounts, with the first one selected (checkbox checked). The selected account is '1028530426' with a gear icon and links 'Select All' and 'Deselect All'. To the right of the table, there are buttons for 'Show Selected' and 'Edit Selected'. The 'Edit Selected' button has a dropdown menu open, showing options: 'Business Information', 'Contact Information', 'Bank Information', and 'Owner Information'. A 'Chat' button is at the bottom right.

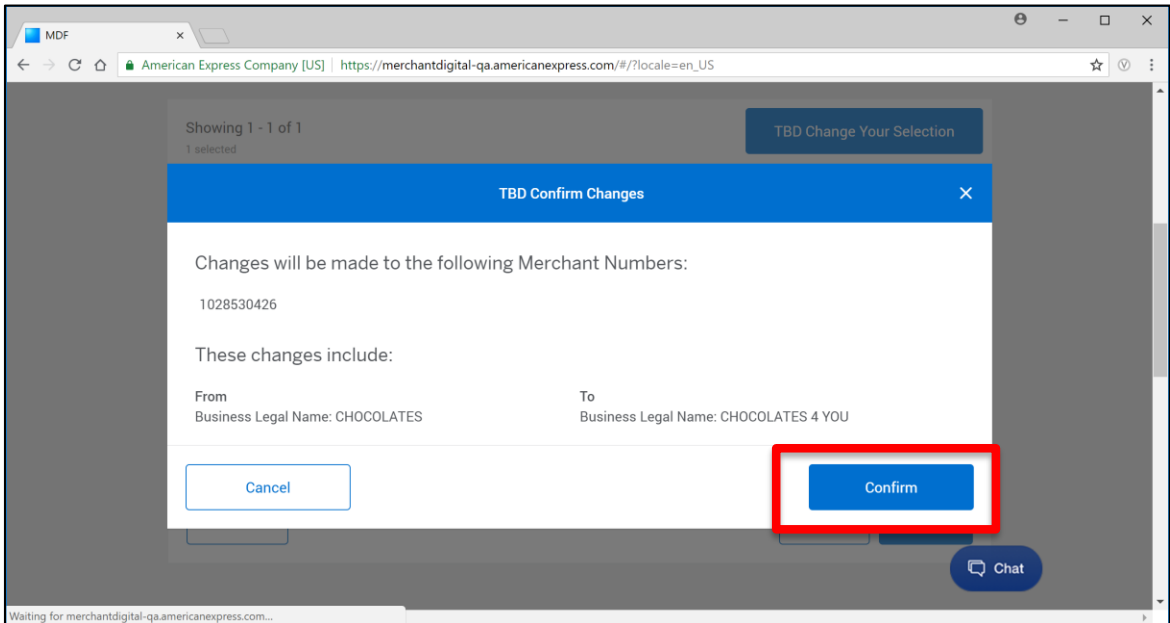
1. Below are the fields you can edit in the “Business Information” tab on your own now. Location ID and Federal Tax ID number are new fields that have been added. Once you make edits, click Apply.

The screenshot shows the 'Business Information' tab selected. It displays four input fields: 'FEDERAL TAX ID NUMBER' (with a yellow star icon), 'BUSINESS LEGAL NAME', 'DOING BUSINESS AS', and 'LOCATION ID' (with a yellow star icon). The 'FEDERAL TAX ID NUMBER' field contains '985623157'. The 'BUSINESS LEGAL NAME' field contains 'CHOCOLATES' with a green checkmark. The 'DOING BUSINESS AS' field contains 'MCNCHEESE'. The 'LOCATION ID' field contains 'LATE LUNCH'. At the bottom, there are three buttons: 'Cancel', 'Clear', and 'Apply' (which is highlighted with a red box).

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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.

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

| Business Information | Contact Information | Bank Information | Owner Information |
|-------------------------------------------------------------|-------------------------------------------------|------------------------------------|-------------------|
| BUSINESS TELEPHONE NUMBER <input type="text"/> | CUSTOMER SERVICE NUMBER <input type="text"/> | FAX NUMBER <input type="text"/> | |
| Physical Address | | | |
| STREET ADDRESS <input type="text"/> | | CITY <input type="text"/> | |
| ADDRESS / SUITE / APT. (OPTIONAL) <input type="text"/> | | STATE <input type="text"/> | |
| ADDRESS / SUITE / APT. (OPTIONAL) <input type="text"/> | | ZIP CODE <input type="text"/> | |
| COUNTRY <input type="text"/> | | | |
| Supply Address Cannot be same as Physical Address | | | |
| STREET ADDRESS <input type="text"/> | | CITY <input type="text"/> | |

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Bank Information Tab: 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”

The screenshot shows the 'Bank Information' tab selected, indicated by a red box. Below the tabs, a progress bar shows four steps: 1. Specify Change (active), 2. Verify Bank Info, 3. Enter New Bank Info, and 4. Confirmation. The main content area is titled 'Step 1: Specify Which Accounts to Change' and includes instructions: 'For the locations you have selected, you can change the following accounts. You will need to verify the bank information for all accounts selected'. Under 'Credit Account(s)', the checkbox 'Credit Bank Account(s) ending in' is checked. Under 'Debit Accounts', the checkbox 'Debit Bank Account(s) ending in' is unchecked. A note states: 'When selecting multiple accounts, please be aware that all accounts selected will be updated with a singular bank account number.' At the bottom, there are 'Cancel' and 'Continue' buttons.

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

The screenshot shows the 'Bank Information' tab selected. The progress bar now shows: 1. Specify Change (completed with a checkmark), 2. Verify Bank Info (active), 3. Enter New Bank Info, and 4. Confirmation. The main content area is titled 'Step 2: Verify Existing Bank Account(s)' and includes instructions: 'Your selected location(s) have 1 credit account(s) associated with them. In order to proceed please enter below the existing Bank Account Number(s)'. It specifies 'Verify accounts ending in XXXX9999' and shows a text input field labeled 'CURRENT BANK ACCOUNT NUMBER' with the value '99999999' entered. At the bottom, there are 'Cancel' and 'Continue' buttons.

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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”

| Business Information | Contact Information | Bank Information | Owner Information |
|---------------------------------------|---------------------|-----------------------------------------|-------------------|
| ✓ Specify Change | ✓ Verify Bank Info | 3. Enter New Bank Info | 4. Confirmation |
| Step 3: Enter New Bank Information | | | |
| Credit | | | |
| 9-DIGIT ROUTING NUMBER | | CONFIRM NEW 9-DIGIT ROUTING NUMBER | |
| <input type="text"/> | | <input type="text"/> | |
| BANK ACCOUNT NUMBER | | CONFIRM NEW BANK ACCOUNT NUMBER | |
| <input type="text"/> | | <input type="text"/> | |
| ACCOUNT TYPE | | | |
| <input type="text" value="Select"/> | | | |
| BANK NAME | | | |
| <input type="text"/> | | | |
| <input type="button" value="Cancel"/> | | <input type="button" value="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.

| Business Information | Contact Information | Bank Information | Owner Information |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-----------------------------------------|-------------------|
| ✓ Specify Change | ✓ Verify Bank Info | ✓ Enter New Bank Info | 4. Confirmation |
| Step 4: Confirmation | | | |
| Changes will be made to the following Merchant Accounts: | | | |
| 5363370800 | | | |
| These changes include: | | | |
| Credit Bank Account | | | |
| <ul style="list-style-type: none">• 9-digit Routing Number : 147852369• Account Type : C• Bank Account Number : 1234567890• Bank Name : Test Bank | | | |
| <input type="button" value="Cancel"/> | | <input type="button" value="Continue"/> | |

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

| Business Information | Contact Information | Bank Information | Owner Information |
|----------------------------------------|---------------------|---------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| Johnny Test | | |  |
| FIRST NAME | | LAST NAME | |
| <input type="text"/> | | <input type="text"/> | |
| STREET ADDRESS | | CITY | |
| <input type="text" value="Test Town"/> | | <input type="text" value="Test City"/> | |
| STREET ADDRESS | | STATE | ZIP CODE |
| <input type="text"/> | | <input type="text" value="AZ"/>  | <input type="text" value="85024"/> |
| STREET ADDRESS | | COUNTRY | |
| <input type="text"/> | | <input type="text" value="USA"/> | |
| OWNER PERCENTAGE | | | |
| <input type="text" value="50"/> | | | |
| <hr/> | | | |
| New Name | | |  |

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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

Showing 1 - 10 of 10
3 selected

ALL LOCATIONS > 1028530426

Show Selected Edit Selected

| MERCHANT ACCOUNT NUMBER | DOING BUSINESS AS | LOCATION ID | FEDERAL |
|-----------------------------------------------|--------------------|-------------|----------|
| <input checked="" type="checkbox"/> 363370834 | FLUFFY UNICORNS | SELOC | 00000000 |
| <input checked="" type="checkbox"/> 363370867 | MDF LIF 6 MERCH... | | 00000000 |
| <input checked="" type="checkbox"/> 363370826 | MDF LIF 2 MERCH... | | 00000000 |
| <input type="checkbox"/> 363370859 | MDF LIF 5 MERCH... | | 00000000 |
| <input type="checkbox"/> 5363370818 | MDF LIF 1 MERCH... | | 00000000 |

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.

☒ Business Telephone Number ☐ Customer Service Number ☐ Fax Number

Physical Address
☐ Street Address ☐ City ☐ State ☐ ZIP Code

Payment Address
☐ Street Address ☐ City ☐ State ☐ ZIP Code

Supply Address
☐ Street Address ☐ City ☐ State ☐ ZIP Code

Correspondence Address
☐ Street Address ☐ City ☐ State ☐ ZIP Code

BUSINESS TELEPHONE NUMBER
1111111111

Chat

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Downloading/Printing Reports

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

