Welcome to the Merchant Website Training

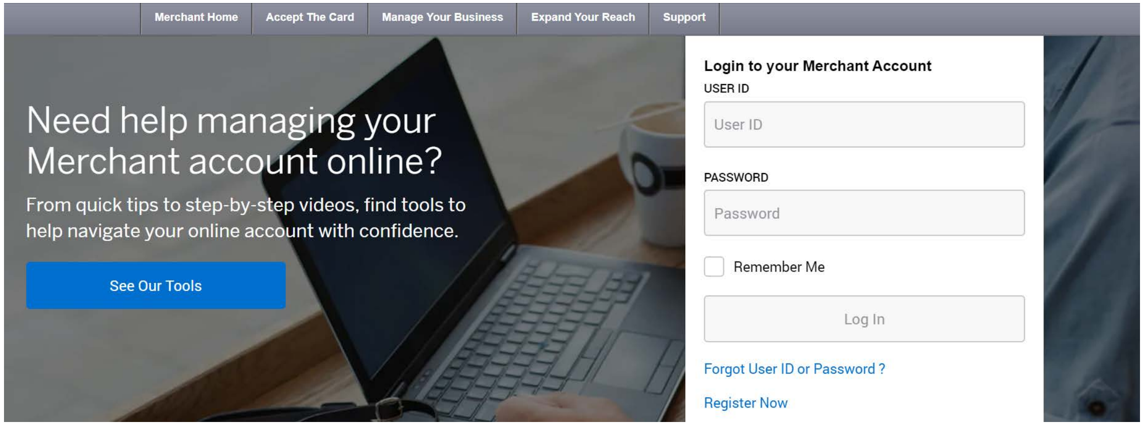
An essential guide to managing your Account online, quickly

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

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Forgotten user ID or password

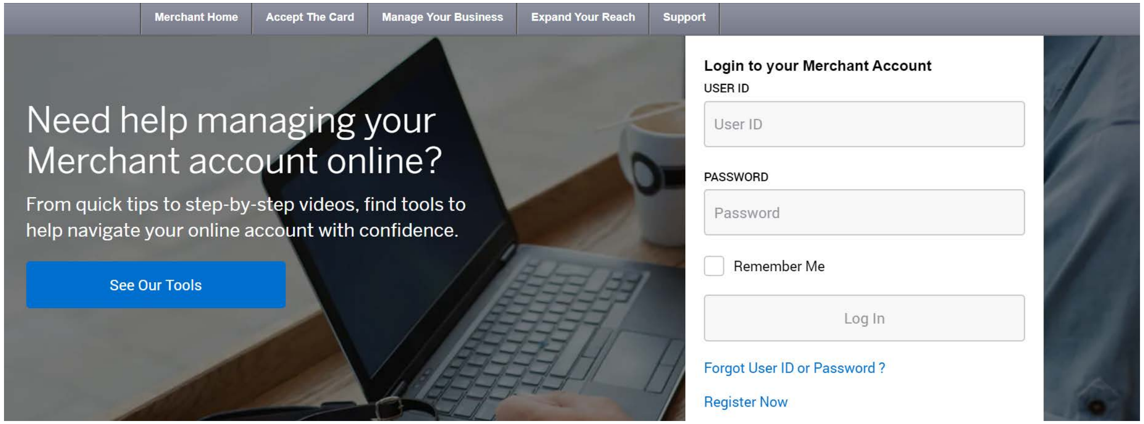
Click **FORGOT USER ID OR PASSWORD** on the homepage to get a reminder or reset your password.

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



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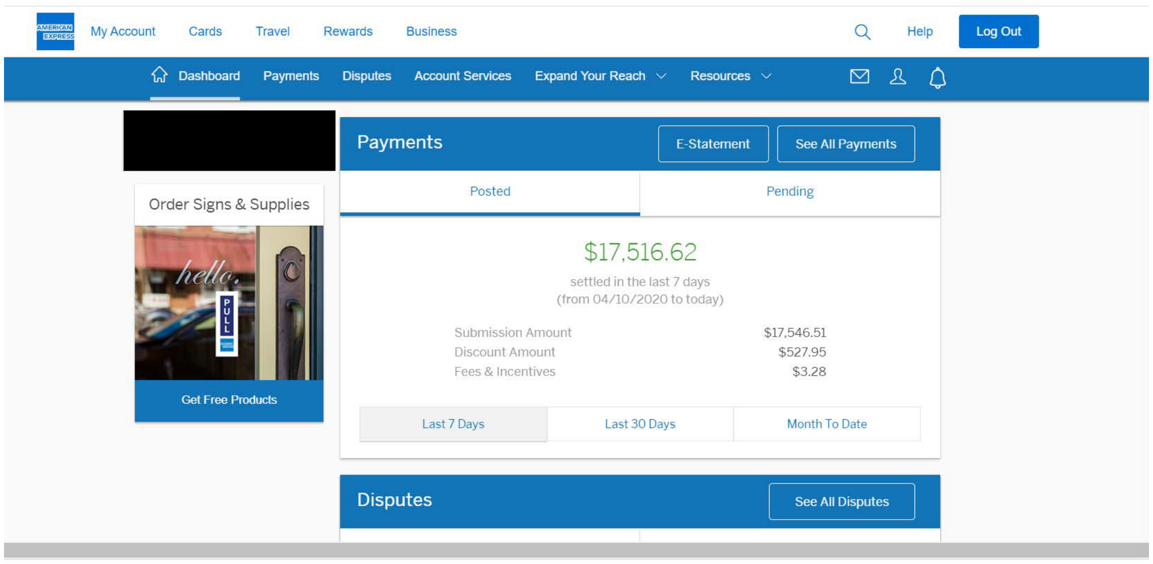
Account Dashboard

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



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

Get started

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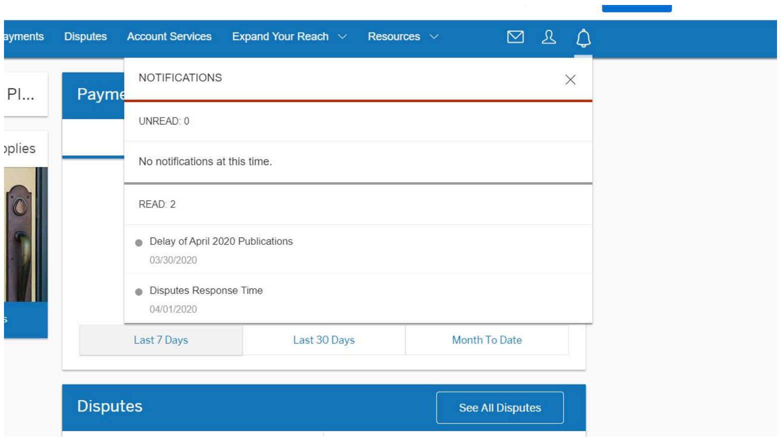
Notifications

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



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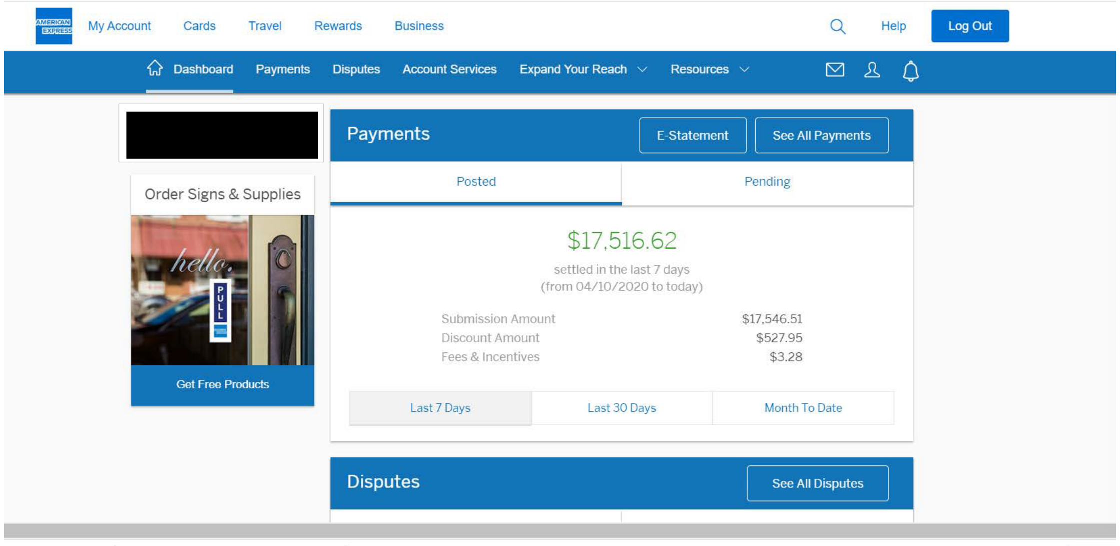
Payments

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.

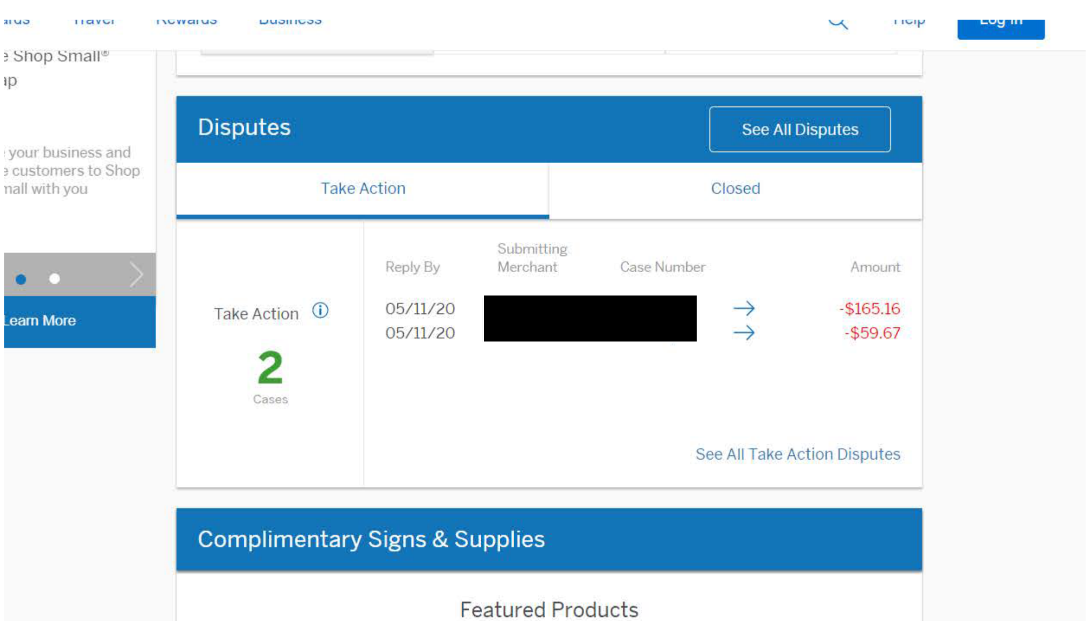


Get started

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.



Get started

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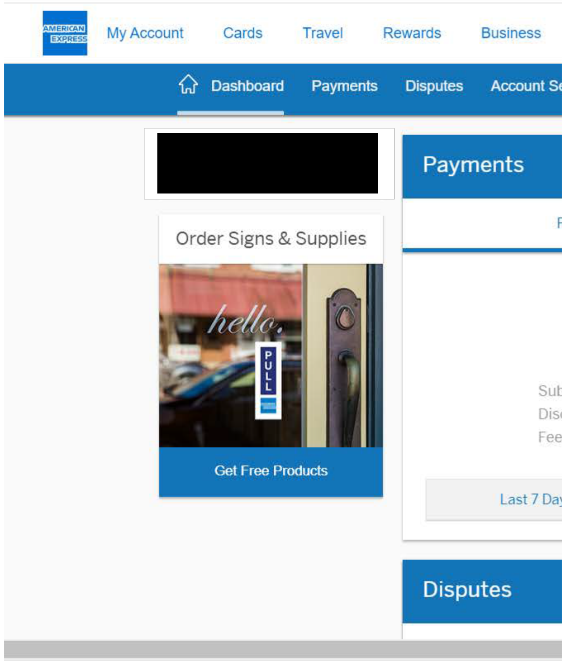
Logos and Supplies

To view the Complimentary Logos and Supplies, click the <u>'Browse selection'</u> link. You'll be taken to our website where you can browse and order our complimentary merchandise and signage.



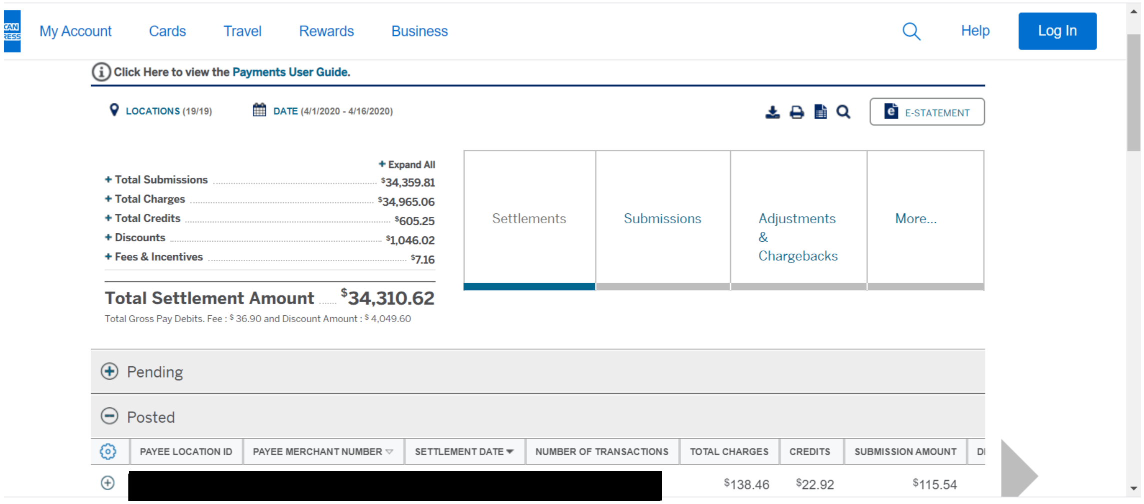
Payments

Learn how to manage everything to do with payments

Payments at a Glance

The <u>PAYMENTS HOMEPAGE</u> has 5 key features:

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



Payments

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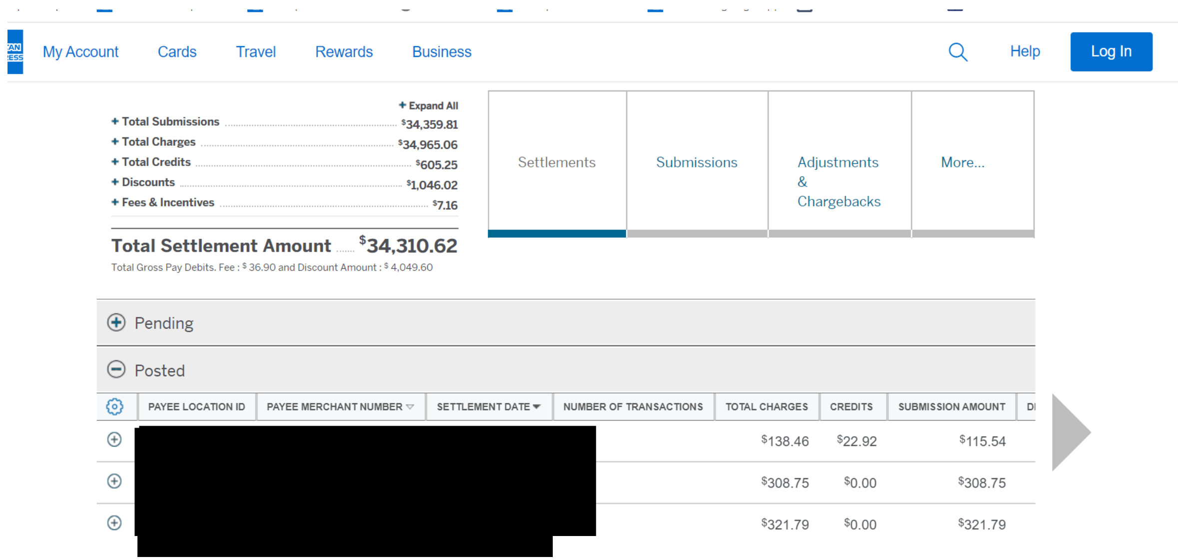
Tools

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.



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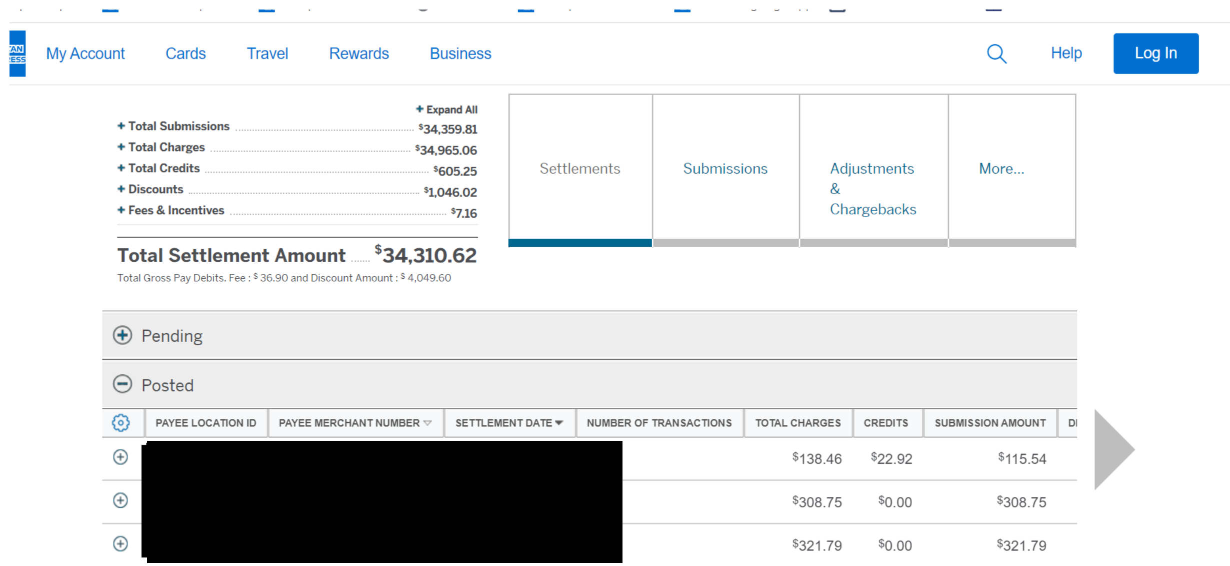
Payments summary

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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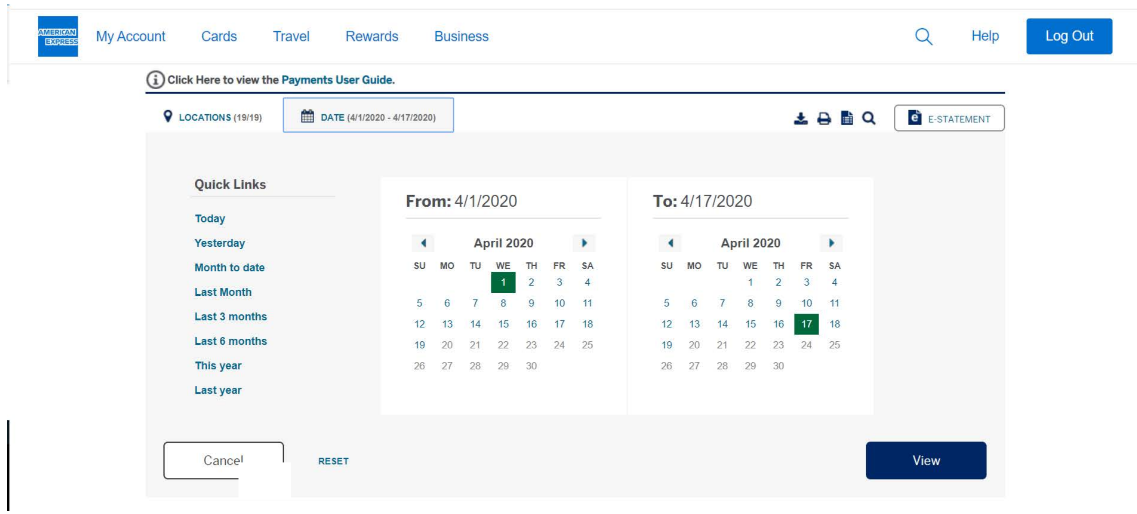
Location and date filters

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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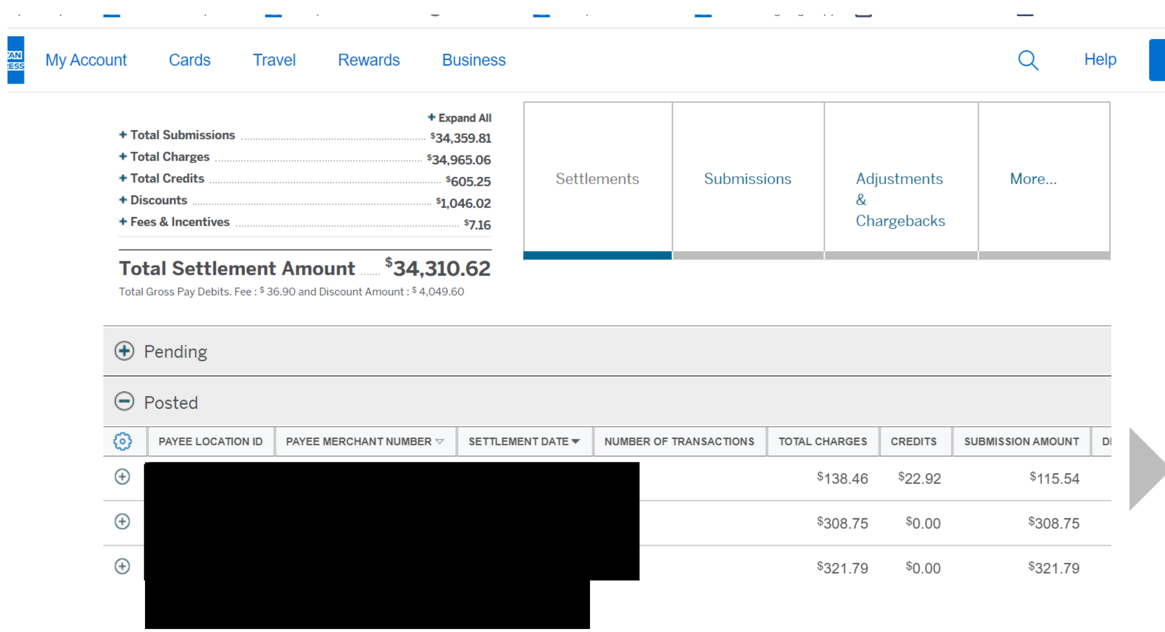
Report menu

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.



Payments

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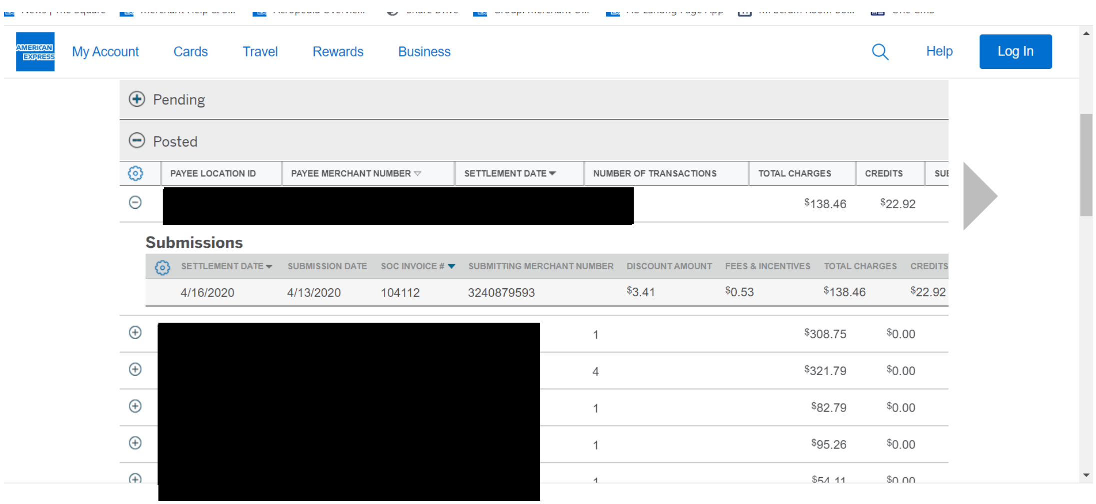
View report

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.



Payments

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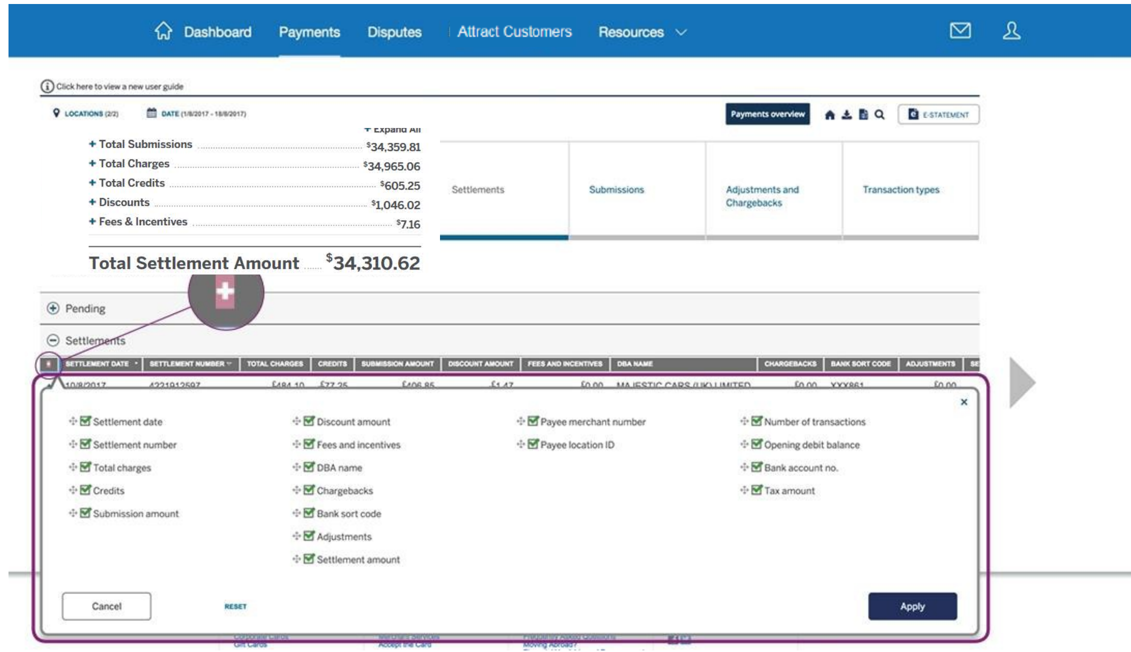
Customise reports

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

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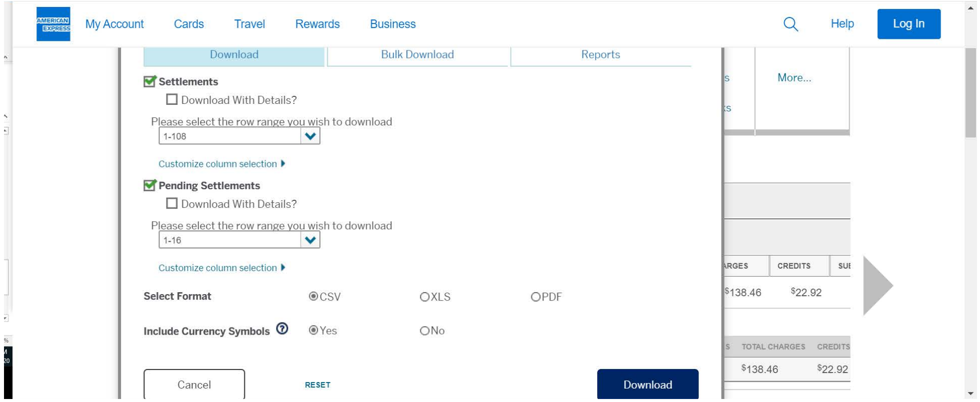
Download reports

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

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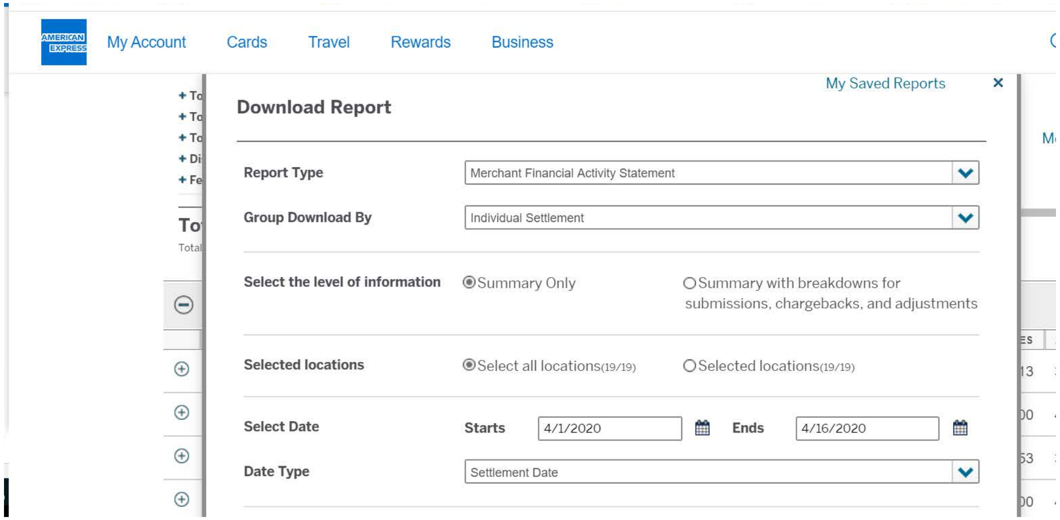
Export reports

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

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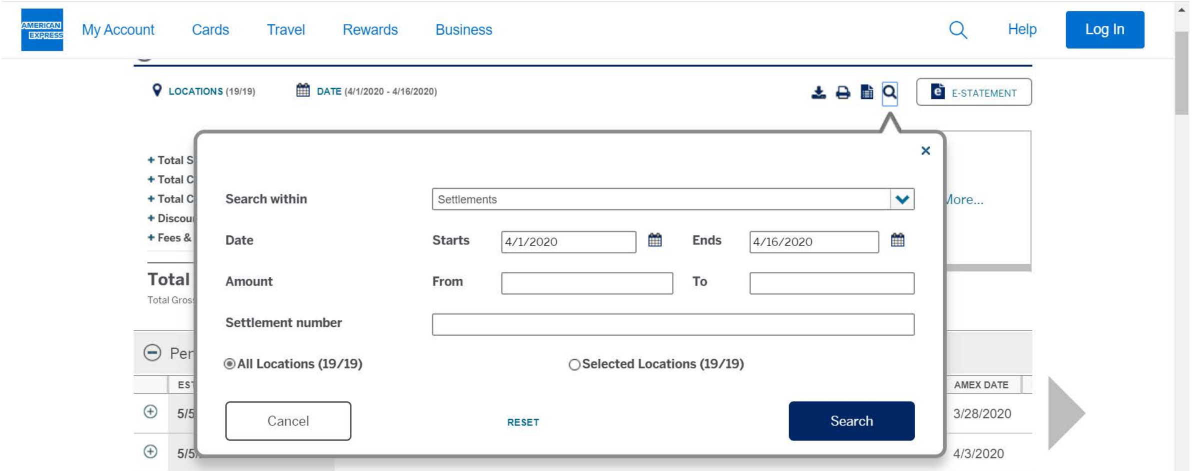
Search reports

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.



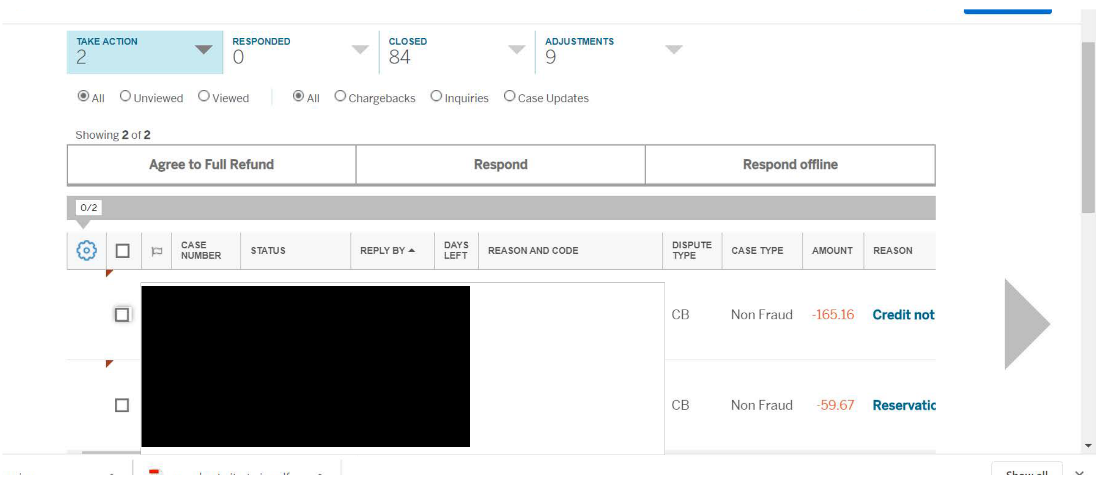
Disputes

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

Disputes at a glance

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

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



Disputes

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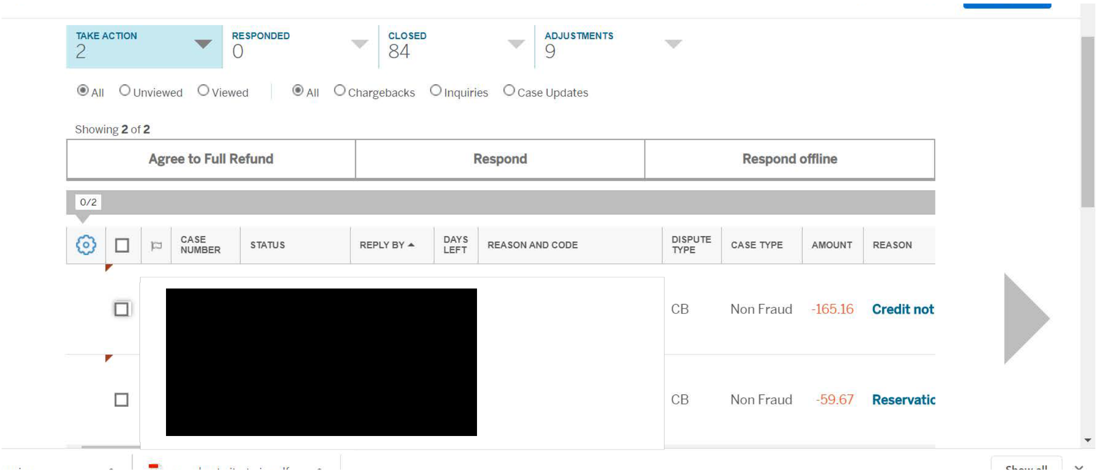
Filters

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

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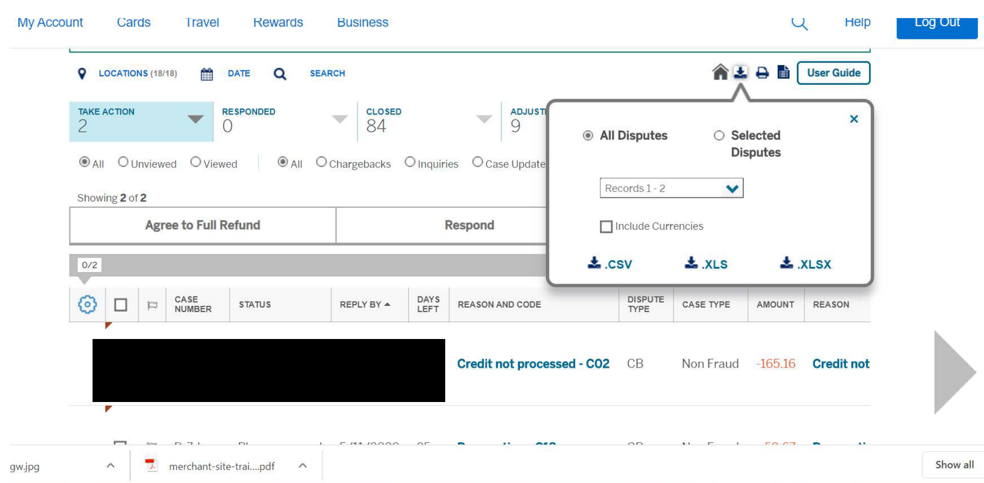
Tools

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



Disputes

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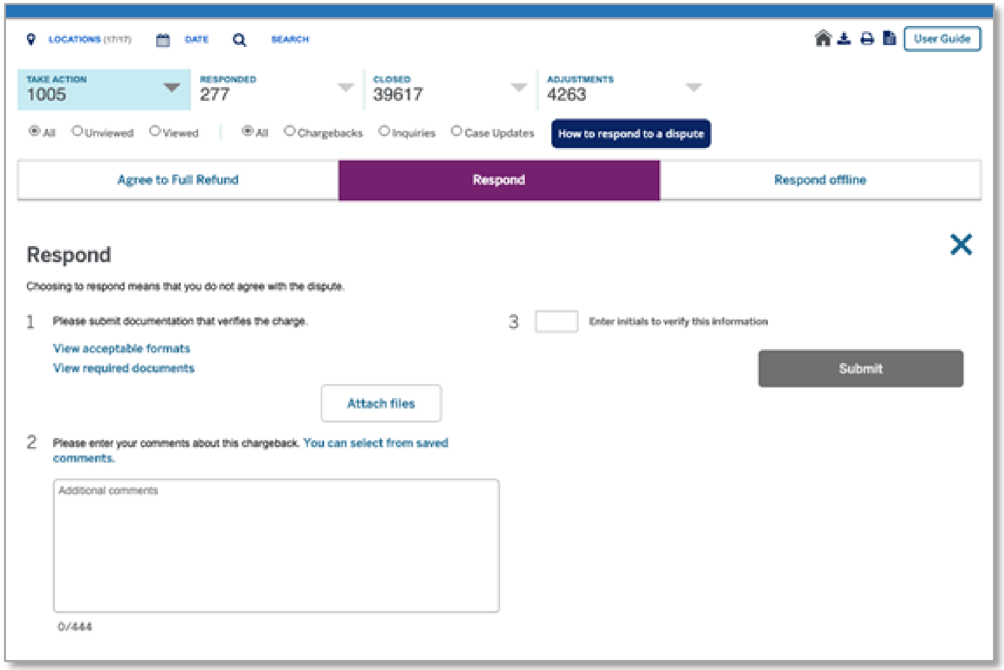
Respond to us

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



Disputes

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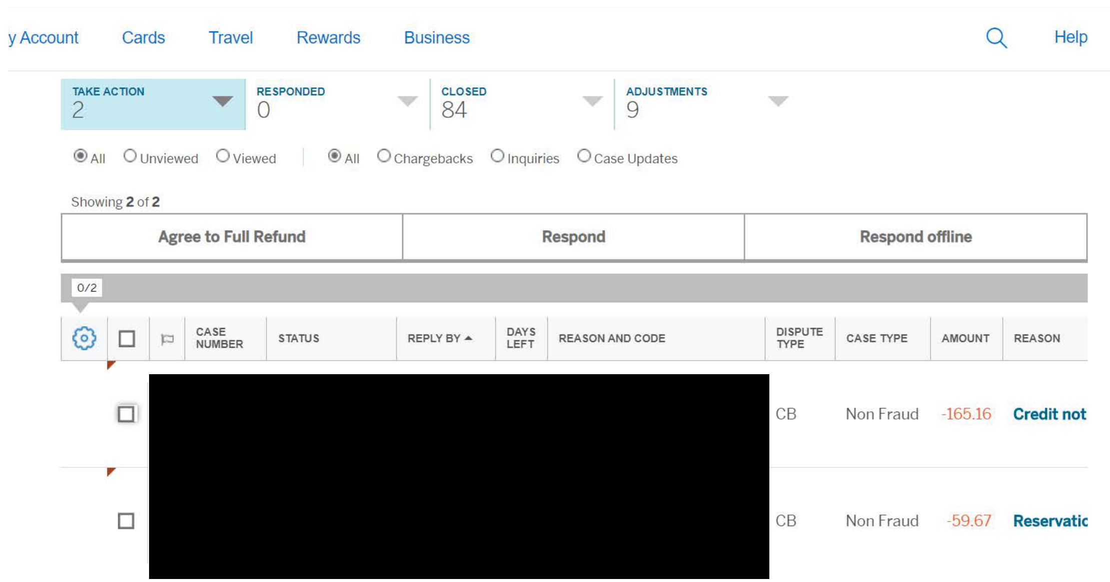
Summary Report

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



Disputes

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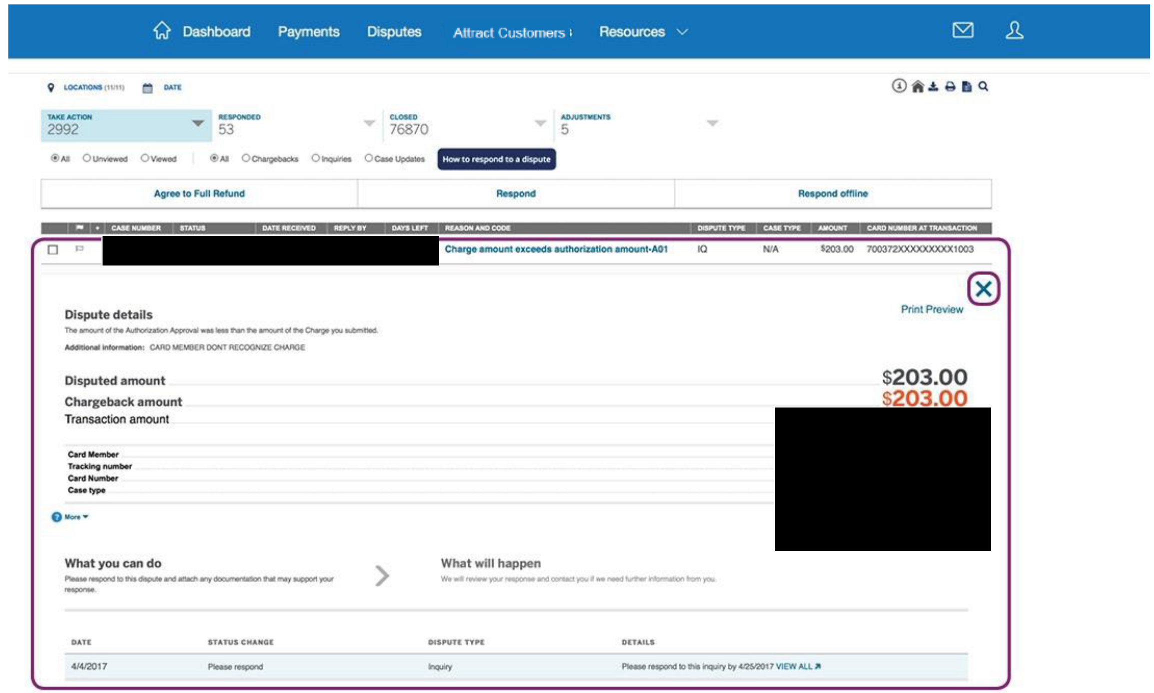
View details of a case

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

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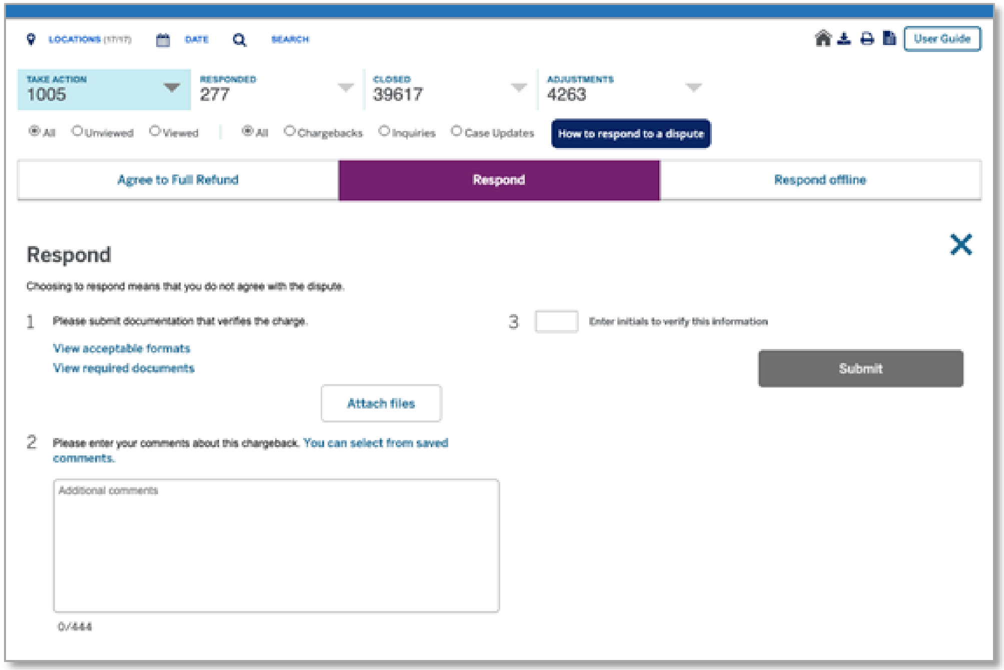
Respond to disputes

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.



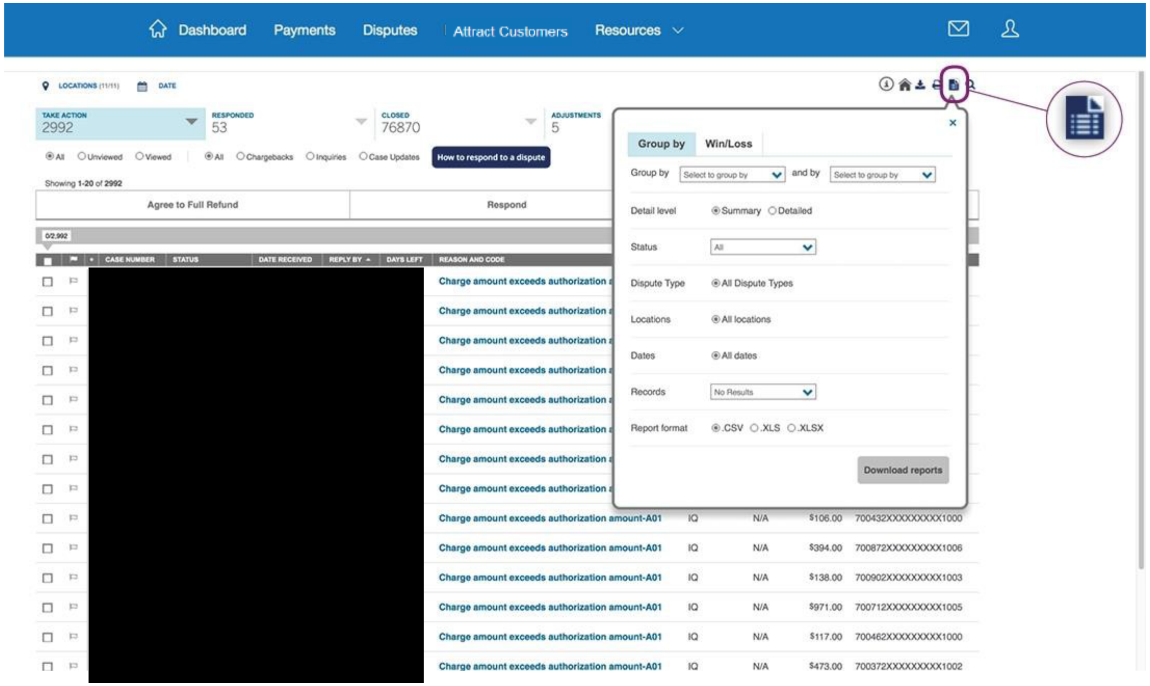
Disputes

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

Customised Reports

You can also create customised reports. Tod o 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.



Logos and supplies

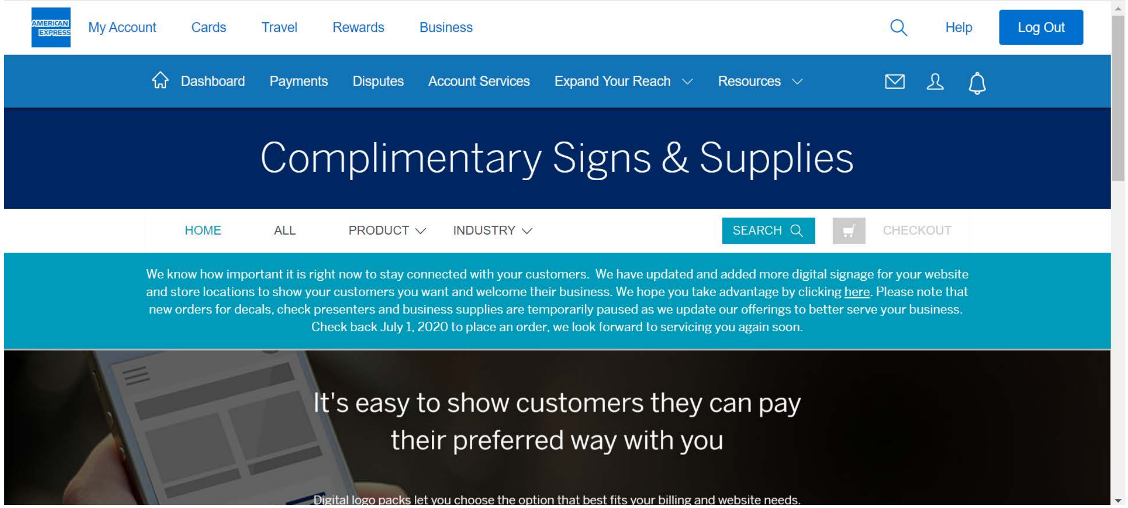
The fastest and easiest way to get merchandise and supplies for your business

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.



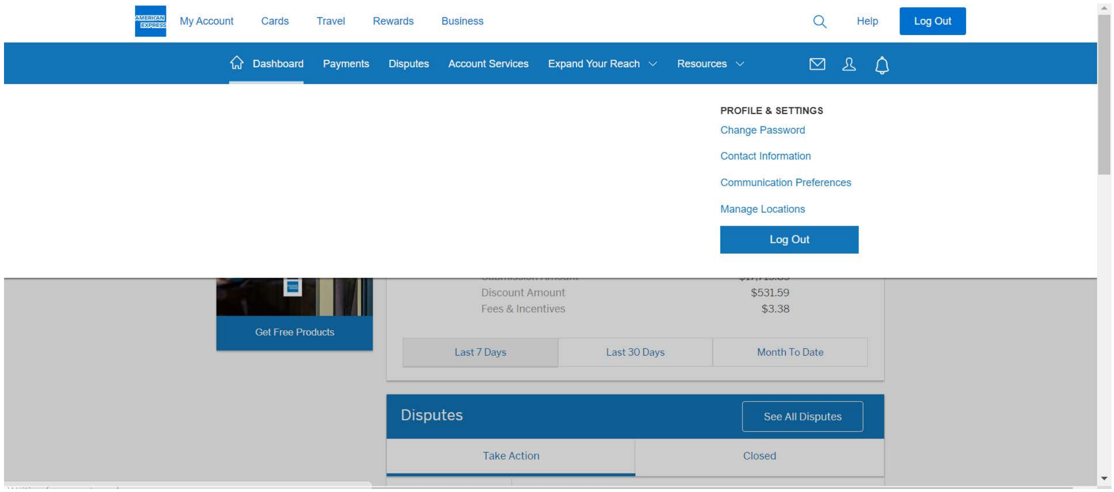
Profile and settings

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)



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 1-800-528-5200
EMAIL	Email us your questions and/or requests through the secure message center
LIVE CHAT	Click the 'Chat' icon on the bottom right corner of the screen, to open a Live Chat with Customer Service. Available Mon-Fri 8-6:00
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.