

Welcome to the Merchant Website Training

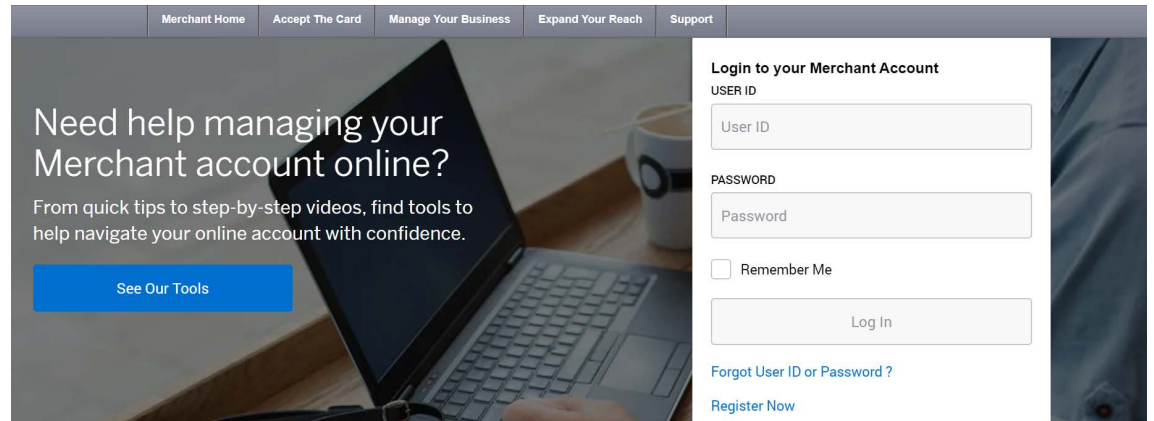
An essential guide to managing your Account
online, quickly

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.



The screenshot shows a web interface for logging into a merchant account. At the top, there is a navigation bar with links: Merchant Home, Accept The Card, Manage Your Business, Expand Your Reach, and Support. The main content area features a large heading "Need help managing your Merchant account online?" and a subtext "From quick tips to step-by-step videos, find tools to help navigate your online account with confidence." Below this is a blue button labeled "See Our Tools". To the right, there is a login form titled "Login to your Merchant Account". The form includes fields for "USER ID" and "PASSWORD", a "Remember Me" checkbox, and a "Log In" button. At the bottom of the form, there are links for "Forgot User ID or Password?" and "Register Now". The background of the page shows a laptop and a coffee cup on a desk.

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

Need help managing your Merchant account online?

From quick tips to step-by-step videos, find tools to help navigate your online account with confidence.

[See Our Tools](#)

Login to your Merchant Account

USER ID

PASSWORD

☐ Remember Me

[Log In](#)

[Forgot User ID or Password ?](#)

[Register Now](#)

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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 UserID?

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

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

Need help managing your Merchant account online?

From quick tips to step-by-step videos, find tools to help navigate your online account with confidence.

[See Our Tools](#)

Login to your Merchant Account

USER ID

PASSWORD

☐ Remember Me

[Log In](#)

[Forgot User ID or Password ?](#)

[Register Now](#)

Get started

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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

The screenshot displays the American Express Account Dashboard. The top navigation bar includes links for My Account, Cards, Travel, Rewards, and Business, along with a search icon, Help, and a Log Out button. The main dashboard area features a blue header with navigation tabs: Dashboard, Payments, Disputes, Account Services, Expand Your Reach, and Resources. On the left, there's a promotional card for 'Order Signs & Supplies' with a 'Get Free Products' button. The central 'Payments' section shows a balance of \$17,516.62, settled in the last 7 days (from 04/10/2020 to today). Below this, a table lists the Submission Amount (\$17,546.51), Discount Amount (\$527.95), and Fees & Incentives (\$3.28). At the bottom, there's a 'Disputes' section with a 'See All Disputes' button. The interface is clean and professional, with a focus on providing clear financial information and easy navigation.

Payments	
Posted	Pending
\$17,516.62 settled in the last 7 days (from 04/10/2020 to today)	
Submission Amount	\$17,546.51
Discount Amount	\$527.95
Fees & Incentives	\$3.28

Disputes	
See All Disputes	

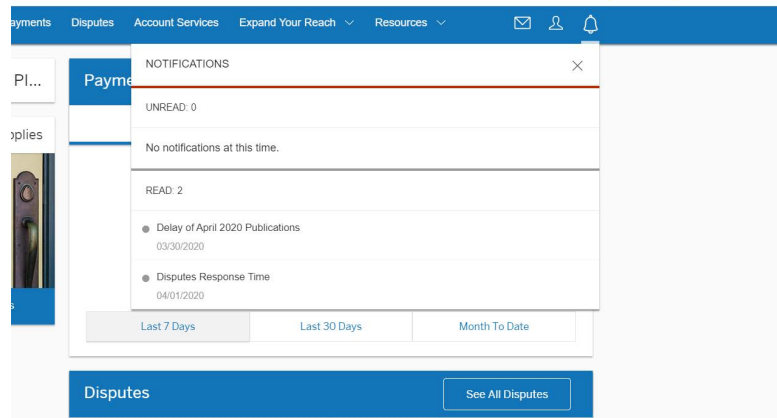
Please note that the content you can see in your Dashboard may vary depending on what you're entitled to view.

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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 snapshot 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.

The screenshot shows the American Express Payments dashboard. At the top, there's a navigation bar with links for My Account, Cards, Travel, Rewards, and Business. On the right, there are links for Help and Log Out. Below this is a secondary navigation bar with Dashboard, Payments, Disputes, Account Services, Expand Your Reach, and Resources. The main content area is titled 'Payments' and features two tabs: 'Posted' (selected) and 'Pending'. The 'Posted' tab displays a large green amount of \$17,516.62, noted as 'settled in the last 7 days (from 04/10/2020 to today)'. Below this, a table shows the breakdown: Submission Amount (\$17,546.51), Discount Amount (\$527.95), and Fees & Incentives (\$3.28). At the bottom of the Payments section, there are three filters: Last 7 Days, Last 30 Days, and Month To Date. To the left of the Payments section, there's a promotional banner for 'Order Signs & Supplies' with a 'Get Free Products' button. Below the Payments section, there's a 'Disputes' section with a 'See All Disputes' button.

Payments	
E-Statement See All Payments	
Posted Pending	
\$17,516.62 settled in the last 7 days (from 04/10/2020 to today)	
Submission Amount	\$17,546.51
Discount Amount	\$527.95
Fees & Incentives	\$3.28
Last 7 Days Last 30 Days Month To Date	

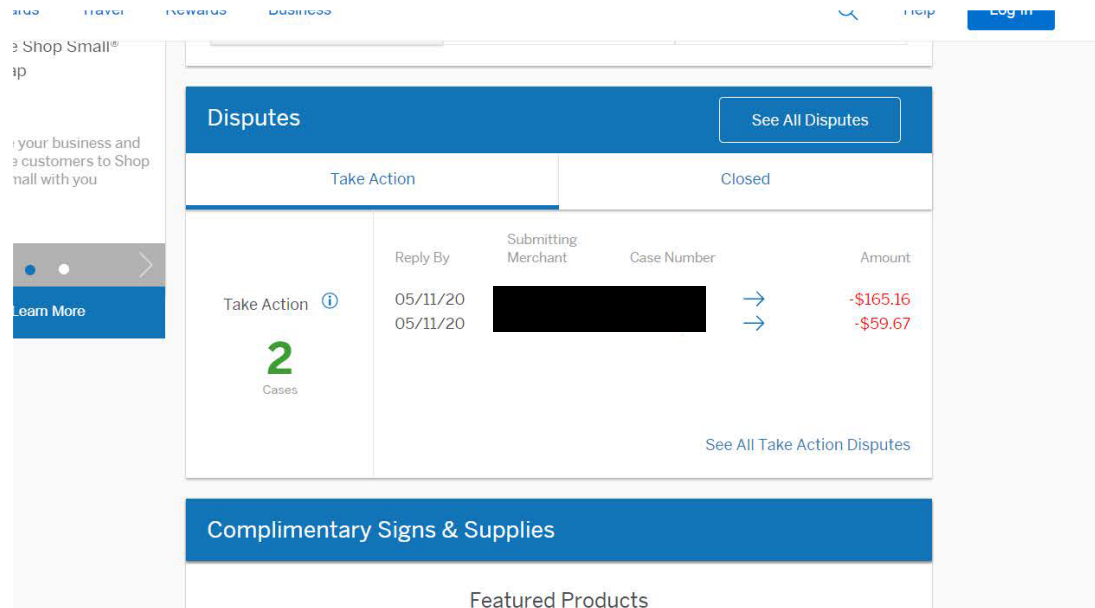
Disputes	
See All Disputes	

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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.



The screenshot shows the 'Disputes' section of a Shop Small account. The interface includes a sidebar with navigation links (Home, Disputes, Payments, Business) and a 'Shop Small' logo. The main content area has a 'Disputes' header with a 'See All Disputes' button. Below this are two tabs: 'Take Action' (selected) and 'Closed'. The 'Take Action' tab displays a table of disputes with columns for 'Reply By', 'Submitting Merchant', 'Case Number', and 'Amount'. A large green '2' indicates the number of cases. A 'Learn More' button is visible in the sidebar. Below the table is a 'See All Take Action Disputes' link. At the bottom, there are sections for 'Complimentary Signs & Supplies' and 'Featured Products'.

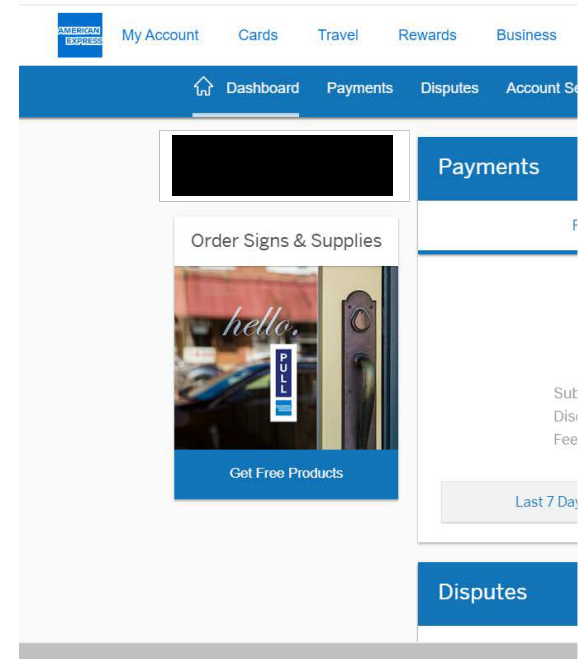
Reply By	Submitting Merchant	Case Number	Amount
05/11/20			-\$165.16
05/11/20			-\$59.67

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.



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

The screenshot displays the PAYMENTS HOMEPAGE interface. At the top, there is a navigation bar with tabs for 'My Account', 'Cards', 'Travel', 'Rewards', and 'Business'. A search icon and a 'Log In' button are also present. Below the navigation bar, a link to 'Click Here to view the Payments User Guide.' is visible. The main content area features a summary section with filters for 'LOCATIONS (19/19)' and 'DATE (4/1/2020 - 4/16/2020)'. A summary table shows the following data:

	Expand All
+ Total Submissions	\$34,359.81
+ Total Charges	\$34,965.06
+ Total Credits	\$605.25
+ Discounts	\$1,046.02
+ Fees & Incentives	\$7.16

The 'Total Settlement Amount' is \$34,310.62. Below this, a note states: 'Total Gross Pay Debits, Fee: \$ 36.90 and Discount Amount: \$ 4,049.60'. A section for 'Pending' and 'Posted' transactions is shown. At the bottom, a table lists transaction details:

PAYEE LOCATION ID	PAYEE MERCHANT NUMBER	SETTLEMENT DATE	NUMBER OF TRANSACTIONS	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT	DI
				\$138.46	\$22.92	\$115.54	

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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.

The screenshot displays the Payments module interface. At the top, there is a navigation bar with links for 'My Account', 'Cards', 'Travel', 'Rewards', and 'Business'. A search icon and a 'Log In' button are also present. Below the navigation bar, a summary section shows a list of items with their respective amounts, including 'Total Submissions', 'Total Charges', 'Total Credits', 'Discounts', and 'Fees & Incentives'. A 'Total Settlement Amount' of \$34,310.62 is prominently displayed. To the right of this summary is a tabbed interface with four tabs: 'Settlements', 'Submissions', 'Adjustments & Chargebacks', and 'More...'. The 'Settlements' tab is currently selected. Below the tabs, there is a table with columns for 'PAYEE LOCATION ID', 'PAYEE MERCHANT NUMBER', 'SETTLEMENT DATE', 'NUMBER OF TRANSACTIONS', 'TOTAL CHARGES', 'CREDITS', 'SUBMISSION AMOUNT', and 'DI'. The table contains three rows of data, with the first two rows partially obscured by a black redaction box. A large grey arrow points to the right, indicating that the table can be scrolled.

+ Expand All							
+ Total Submissions	\$34,359.81						
+ Total Charges	\$34,965.06						
+ Total Credits	\$605.25						
+ Discounts	\$1,046.02						
+ Fees & Incentives	\$7.16						
Total Settlement Amount		\$34,310.62					
Total Gross Pay Debits: Fee : \$ 36.90 and Discount Amount : \$ 4,049.60							
+ Pending							
- Posted							
⚙	PAYEE LOCATION ID	PAYEE MERCHANT NUMBER	SETTLEMENT DATE	NUMBER OF TRANSACTIONS	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT
+	[REDACTED]				\$138.46	\$22.92	\$115.54
+	[REDACTED]				\$308.75	\$0.00	\$308.75
+	[REDACTED]				\$321.79	\$0.00	\$321.79

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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.

AN

56

My Account

Cards

Travel

Rewards

Business

Help

Log In

+

Expand All

+ Total Submissions

\$34,359.81

+ Total Charges

\$34,965.06

+ Total Credits

\$605.25

+ Discounts

\$1,046.02

+ Fees & Incentives

\$7.16

Total Settlement Amount

\$34,310.62

Total Gross Pay Debits, Fee : \$ 36.90 and Discount Amount : \$ 4,049.60

Settlements

Submissions

Adjustments & Chargebacks

More...

+

Pending

-

Posted

⚙

PAYEE LOCATION ID

▾

PAYEE MERCHANT NUMBER

▾

SETTLEMENT DATE

NUMBER OF TRANSACTIONS

TOTAL CHARGES

CREDITS

SUBMISSION AMOUNT

DI

+

\$138.46

\$22.92

\$115.54

+

\$308.75

\$0.00

\$308.75

+

\$321.79

\$0.00

\$321.79

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.

The screenshot displays the American Express Payments User Guide interface. At the top, there is a navigation bar with the American Express logo, links for 'My Account', 'Cards', 'Travel', 'Rewards', and 'Business', a search icon, a 'Help' link, and a 'Log Out' button. Below the navigation bar, a message states 'Click Here to view the Payments User Guide.' The main content area features a filter section with a 'LOCATIONS (19/19)' dropdown and a 'DATE (4/1/2020 - 4/17/2020)' dropdown. To the right of these filters are icons for user profile, print, download, and search, along with an 'E-STATEMENT' button. The filter section includes 'Quick Links' such as 'Today', 'Yesterday', 'Month to date', 'Last Month', 'Last 3 months', 'Last 6 months', 'This year', and 'Last year'. Below these links are two calendar views for April 2020. The 'From' calendar shows the date 1 selected, and the 'To' calendar shows the date 17 selected. At the bottom of the filter section are 'Cancel', 'RESET', and 'View' buttons.

AMERICAN EXPRESS My Account Cards Travel Rewards Business Search Help Log Out

Click Here to view the Payments User Guide.

LOCATIONS (19/19) DATE (4/1/2020 - 4/17/2020) E-STATEMENT

Quick Links

- Today
- Yesterday
- Month to date
- Last Month
- Last 3 months
- Last 6 months
- This year
- Last year

From: 4/1/2020 To: 4/17/2020

April 2020 April 2020

SU	MO	TU	WE	TH	FR	SA
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

SU	MO	TU	WE	TH	FR	SA
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Cancel RESET View

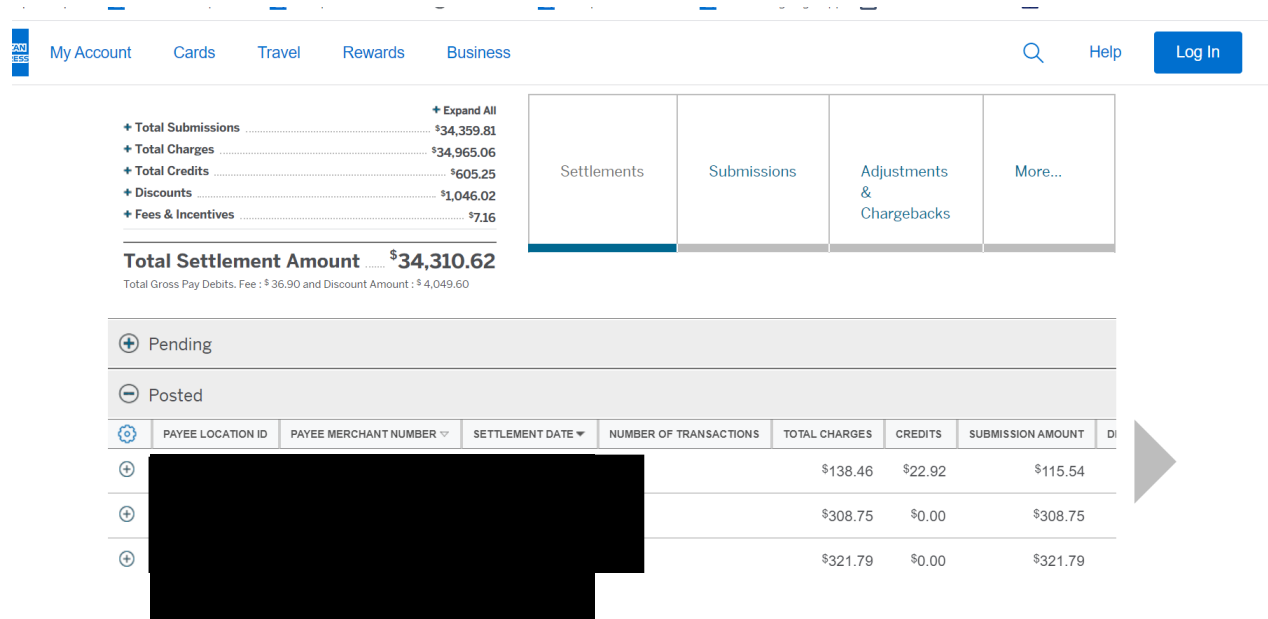
Payments

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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.



The screenshot shows the American Express Business Payments interface. At the top, there's a navigation bar with links for My Account, Cards, Travel, Rewards, and Business. A search icon and a 'Log In' button are also present. Below the navigation bar, there's a summary section with a list of metrics: Total Submissions (\$34,359.81), Total Charges (\$34,965.06), Total Credits (\$605.25), Discounts (\$1,046.02), and Fees & Incentives (\$7.16). The 'Total Settlement Amount' is highlighted as \$34,310.62. Below this, there's a table with columns for PAYEE LOCATION ID, PAYEE MERCHANT NUMBER, SETTLEMENT DATE, NUMBER OF TRANSACTIONS, TOTAL CHARGES, CREDITS, and SUBMISSION AMOUNT. The table shows three rows of data, with the first two rows having a 'Pending' status and the third row having a 'Posted' status. A large black redaction box covers the first two columns of the table.

		Settlements	Submissions	Adjustments & Chargebacks	More...

Total Settlement Amount **\$34,310.62**
Total Gross Pay Debits, Fee : \$36.90 and Discount Amount : \$4,049.60

Pending	
Posted	
⚙	⚙
PAYEE LOCATION ID	PAYEE MERCHANT NUMBER
SETTLEMENT DATE	NUMBER OF TRANSACTIONS
TOTAL CHARGES	CREDITS
SUBMISSION AMOUNT	DI

Payments

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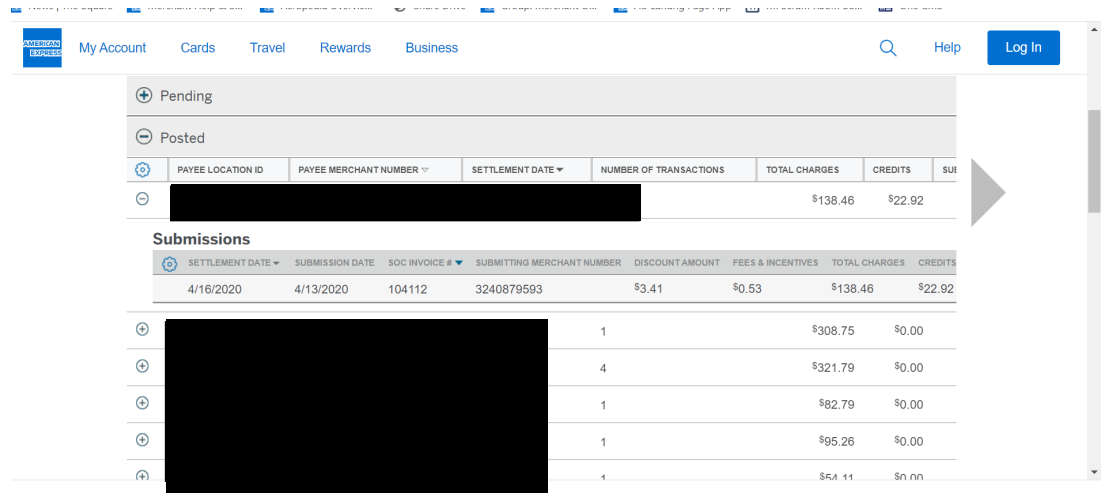
View report

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.



The screenshot displays the American Express Payments dashboard. At the top, there's a navigation bar with the American Express logo and links for 'My Account', 'Cards', 'Travel', 'Rewards', and 'Business'. A search icon, 'Help', and a 'Log In' button are also present. Below the navigation bar, there are two expandable sections: 'Pending' (with a '+' icon) and 'Posted' (with a '-' icon). The 'Posted' section is currently expanded, showing a summary table with columns: PAYEE LOCATION ID, PAYEE MERCHANT NUMBER, SETTLEMENT DATE, NUMBER OF TRANSACTIONS, TOTAL CHARGES, CREDITS, and a partial 'SUM' column. The first row of data is partially obscured by a black redaction box. To the right of this table is a large grey arrow pointing right. Below the summary table is a 'Submissions' section, which is also expanded. It contains a table with columns: SETTLEMENT DATE, SUBMISSION DATE, SOC INVOICE #, SUBMITTING MERCHANT NUMBER, DISCOUNT AMOUNT, FEES & INCENTIVES, TOTAL CHARGES, and CREDITS. The first row of data in the Submissions table is: 4/16/2020, 4/13/2020, 104112, 3240879593, \$3.41, \$0.53, \$138.46, \$22.92. Below this, there are four more rows of data, each with a '+' icon in the left margin, indicating they can be expanded. The first of these rows shows 1 transaction with a total charge of \$308.75 and a credit of \$0.00. The second row shows 4 transactions with a total charge of \$321.79 and a credit of \$0.00. The third row shows 1 transaction with a total charge of \$82.79 and a credit of \$0.00. The fourth row shows 1 transaction with a total charge of \$95.26 and a credit of \$0.00. The fifth row shows 1 transaction with a total charge of \$54.11 and a credit of \$0.00. The last two rows are also partially obscured by a black redaction box.

PAYEE LOCATION ID	PAYEE MERCHANT NUMBER	SETTLEMENT DATE	NUMBER OF TRANSACTIONS	TOTAL CHARGES	CREDITS	SUM
[Redacted]	[Redacted]	[Redacted]	[Redacted]	\$138.46	\$22.92	[Redacted]

SETTLEMENT DATE	SUBMISSION DATE	SOC INVOICE #	SUBMITTING MERCHANT NUMBER	DISCOUNT AMOUNT	FEES & INCENTIVES	TOTAL CHARGES	CREDITS
4/16/2020	4/13/2020	104112	3240879593	\$3.41	\$0.53	\$138.46	\$22.92
[Redacted]	[Redacted]	[Redacted]	[Redacted]	1		\$308.75	\$0.00
[Redacted]	[Redacted]	[Redacted]	[Redacted]	4		\$321.79	\$0.00
[Redacted]	[Redacted]	[Redacted]	[Redacted]	1		\$82.79	\$0.00
[Redacted]	[Redacted]	[Redacted]	[Redacted]	1		\$95.26	\$0.00
[Redacted]	[Redacted]	[Redacted]	[Redacted]	1		\$54.11	\$0.00

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' 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 (2/2)' and 'DATE (18/2017 - 18/2017)'. A table lists various transaction metrics: Total Submissions (\$34,359.81), Total Charges (\$34,965.06), Total Credits (\$605.25), Discounts (\$1,046.02), and Fees & Incentives (\$7.16). The 'Total Settlement Amount' is \$34,310.62. A modal window titled 'Settlements' is open, allowing users to customise the report columns. The modal contains a list of fields with checkboxes and a drag-and-drop interface. The fields include: Settlement date, Settlement number, Total charges, Credits, Submission amount, Discount amount, Fees and incentives, OBA 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 also features 'Cancel', 'RESET', and 'Apply' buttons.

LOCATIONS (2/2)	DATE (18/2017 - 18/2017)
+ Total Submissions	\$34,359.81
+ Total Charges	\$34,965.06
+ Total Credits	\$605.25
+ Discounts	\$1,046.02
+ Fees & Incentives	\$7.16

Total Settlement Amount \$34,310.62

Settlements

SETTLEMENT DATE	SETTLEMENT NUMBER	TOTAL CHARGES	CREDITS	SUBMISSION AMOUNT	DISCOUNT AMOUNT	FEES AND INCENTIVES	OBA NAME	CHARGEBACKS	BANK SORT CODE	ADJUSTMENTS
10/08/2017	4721012507	\$484.10	\$77.25	\$406.85	\$1.47	\$0.00	MAJESTIC CARS (UK) LIMITED	\$0.00	Y00861	\$0.00

Customisation Modal:

- ☒ Settlement date
- ☒ Settlement number
- ☒ Total charges
- ☒ Credits
- ☒ Submission amount
- ☒ Discount amount
- ☒ Fees and incentives
- ☒ OBA name
- ☒ Chargebacks
- ☒ Bank sort code
- ☒ Adjustments
- ☒ Settlement amount
- ☒ Payee merchant number
- ☒ Payee location ID
- ☒ Number of transactions
- ☒ Opening debit balance
- ☒ Bank account no.
- ☒ Tax amount

Buttons: Cancel, RESET, Apply

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.

The screenshot shows the Chase website's 'Download' modal. The modal is titled 'Download' and has three tabs: 'Download', 'Bulk Download', and 'Reports'. The 'Download' tab is active. It contains two sections: 'Settlements' and 'Pending Settlements'. Each section has a checkbox for 'Download With Details?' and a dropdown menu for 'Please select the row range you wish to download'. The 'Settlements' section has a row range of '1-108' and the 'Pending Settlements' section has a row range of '1-16'. Both sections have a 'Customize column selection' link. Below these sections is a 'Select Format' section with radio buttons for 'CSV', 'XLS', and 'PDF'. The 'CSV' option is selected. There is also an 'Include Currency Symbols' section with radio buttons for 'Yes' and 'No'. The 'Yes' option is selected. At the bottom of the modal are 'Cancel', 'RESET', and 'Download' buttons. On the right side of the modal, there is a preview of the report data. It shows a table with columns 'DEBIT', 'CREDITS', and 'SUM'. The 'DEBIT' column has a value of '\$138.46' and the 'CREDITS' column has a value of '\$22.92'. The 'SUM' column has a value of '\$138.46'. Below this table is a 'TOTAL CHARGES' section with a value of '\$138.46' and a 'CREDITS' section with a value of '\$22.92'.

DEBIT	CREDITS	SUM
\$138.46	\$22.92	\$138.46

TOTAL CHARGES	CREDITS
\$138.46	\$22.92

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.

The screenshot shows the 'Download Report' interface within the American Express account management system. The top navigation bar includes 'My Account', 'Cards', 'Travel', 'Rewards', and 'Business'. The 'Download Report' section contains the following fields:

- Report Type:** A dropdown menu set to 'Merchant Financial Activity Statement'.
- Group Download By:** A dropdown menu set to 'Individual Settlement'.
- Select the level of information:** Two radio button options: 'Summary Only' (selected) and 'Summary with breakdowns for submissions, chargebacks, and adjustments'.
- Selected locations:** Two radio button options: 'Select all locations(19/19)' (selected) and 'Selected locations(19/19)'.
- Select Date:** Two date pickers for 'Starts' (4/1/2020) and 'Ends' (4/16/2020).
- Date Type:** A dropdown menu set to 'Settlement Date'.

On the right side of the interface, there is a 'My Saved Reports' section with a close button (X).

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.

AMERICAN EXPRESS

My AccountCardsTravelRewardsBusiness

Log In

LOCATIONS (19/19)

DATE (4/1/2020 - 4/16/2020)

E-STATEMENT

+ Total S
+ Total C
+ Total C
+ Discou
+ Fees &

Total
Total Gros

- Per
EST
+ 5/5
+ 5/5

Search within

Settlements

DateStarts4/1/2020Ends4/16/2020AmountFromToSettlement number

All Locations (19/19)

Selected Locations (19/19)

CancelRESETSearch

More...

AMEX DATE
3/28/2020
4/3/2020

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

The screenshot displays the Disputes Homepage interface. At the top, there are four filter tabs: TAKE ACTION (2), RESPONDED (0), CLOSED (84), and ADJUSTMENTS (9). Below these are radio buttons for filtering by status: All (selected), Unviewed, Viewed, Chargebacks, Inquiries, and Case Updates. A 'Showing 2 of 2' indicator is present. Below the filters are three action buttons: 'Agree to Full Refund', 'Respond', and 'Respond offline'. The main table lists two dispute cases. The first case is a Chargeback (CB) for Non Fraud with an amount of -165.16, marked as 'Credit not'. The second case is also a Chargeback (CB) for Non Fraud with an amount of -59.67, marked as 'Reservatic'. A large black redaction box covers the 'REASON AND CODE' column for both cases.

CASE NUMBER	STATUS	REPLY BY	DAYS LEFT	REASON AND CODE	DISPUTE TYPE	CASE TYPE	AMOUNT	REASON
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	CB	Non Fraud	-165.16	Credit not
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	CB	Non Fraud	-59.67	Reservatic

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 displays a web interface for managing disputes. At the top, there are four filter sections: 'TAKE ACTION' with a dropdown showing '2', 'RESPONDED' with a dropdown showing '0', 'CLOSED' with a dropdown showing '84', and 'ADJUSTMENTS' with a dropdown showing '9'. Below these are radio button filters for 'All', 'Unviewed', 'Viewed', 'Chargebacks', 'Inquiries', and 'Case Updates'. A 'Showing 2 of 2' indicator is present. The main area features a table with three columns: 'Agree to Full Refund', 'Respond', and 'Respond offline'. Below the table is a '0/2' indicator and a table with columns: 'CASE NUMBER', 'STATUS', 'REPLY BY', 'DAYS LEFT', 'REASON AND CODE', 'DISPUTE TYPE', 'CASE TYPE', 'AMOUNT', and 'REASON'. The table contains two rows of data, both with 'CB' as the dispute type and 'Non Fraud' as the case type. The first row shows an amount of '-165.16' and a reason of 'Credit not'. The second row shows an amount of '-59.67' and a reason of 'Reservatic'. A large black rectangle obscures the 'CASE NUMBER' and 'STATUS' columns for both rows. A 'Clear all' button is located at the bottom right.

TAKE ACTION	RESPONDED	CLOSED	ADJUSTMENTS
2	0	84	9

☒ All ☐ Unviewed ☐ Viewed ☒ All ☐ Chargebacks ☐ Inquiries ☐ Case Updates

Showing 2 of 2

Agree to Full Refund	Respond	Respond offline						
0/2								
CASE NUMBER	STATUS	REPLY BY	DAYS LEFT	REASON AND CODE	DISPUTE TYPE	CASE TYPE	AMOUNT	REASON
					CB	Non Fraud	-165.16	Credit not
					CB	Non Fraud	-59.67	Reservatic

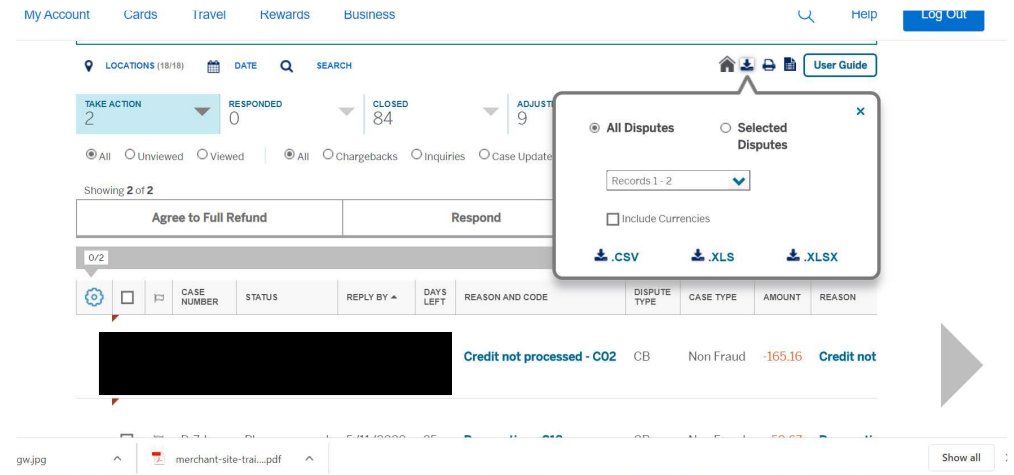
Clear all

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.



The screenshot shows a web application interface for managing disputes. At the top, there are navigation links: "My Account", "Cards", "Travel", "Rewards", and "Business". On the right, there are links for "Help" and "Log Out". Below the navigation bar, there are filters for "LOCATIONS (18/18)", "DATE", and "SEARCH". A summary section shows "TAKE ACTION 2", "RESPONDED 0", "CLOSED 84", and "ADJUSTED 9". Below this, there are radio buttons for "All", "Unviewed", and "Viewed", and another set for "All", "Chargebacks", "Inquiries", and "Case Updates". A "Showing 2 of 2" indicator is present. The main table has columns for "CASE NUMBER", "STATUS", "REPLY BY", "DAYS LEFT", "REASON AND CODE", "DISPUTE TYPE", "CASE TYPE", "AMOUNT", and "REASON". A row is visible with the text "Credit not processed - C02 CB Non Fraud -165.16 Credit not". A modal window is open over the table, showing "All Disputes" and "Selected Disputes" options, a "Records 1 - 2" dropdown, an "Include Currencies" checkbox, and download buttons for ".CSV", ".XLS", and ".XLSX". At the bottom, there are file upload indicators for "gw.jpg" and "merchant-site-trai...pdf", and a "Show all" button.

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 a web interface for managing disputes. At the top, there are filters for 'LOCATIONS (17/17)', 'DATE', and 'SEARCH'. Below these are four summary boxes: 'TAKE ACTION 1005', 'RESPONDED 277', 'CLOSED 39617', and 'ADJUSTMENTS 4263'. A row of radio buttons allows filtering by 'All', 'Unviewed', 'Viewed', 'Chargebacks', 'Inquiries', and 'Case Updates'. A 'How to respond to a dispute' button is also present. Below the filters are three main action buttons: 'Agree to Full Refund', 'Respond' (highlighted in purple), and 'Respond offline'. The 'Respond' section is titled 'Respond' and includes a note: 'Choosing to respond means that you do not agree with the dispute.' It contains three numbered steps: 1. 'Please submit documentation that verifies the charge.' with links for 'View acceptable formats' and 'View required documents', and an 'Attach files' button. 2. 'Please enter your comments about this chargeback. You can select from saved comments.' with a text area labeled 'Additional comments'. 3. 'Enter initials to verify this information' with a text input field. A 'Submit' button is located at the bottom right of the form. A status indicator '0/444' is at the bottom left.

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.

My Account

Cards

Travel

Rewards

Business

Help

TAKE ACTION

2

RESPONDED

0

CLOSED

84

ADJUSTMENTS

9

All

Unviewed

Viewed

All

Chargebacks

Inquiries

Case Updates

Showing 2 of 2

Agree to Full Refund				Respond				Respond offline			
0/2											
			CASE NUMBER	STATUS	REPLY BY ▲	DAYS LEFT	REASON AND CODE	DISPUTE TYPE	CASE TYPE	AMOUNT	REASON
								CB	Non Fraud	-165.16	Credit not
								CB	Non Fraud	-59.67	Reservatic

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 dispute management interface. At the top, a navigation bar includes links for Dashboard, Payments, Disputes, Attract Customers, and Resources. Below this, a filter bar shows 'LOCATIONS (11/11)', 'DATE', and a 'TAKE ACTION' dropdown set to '2992'. A summary bar indicates 'RESPONDED 53', 'CLOSED 76870', and 'ADJUSTMENTS 5'. A 'How to respond to a dispute' button is visible. The main content area features a table with columns: CASE NUMBER, STATUS, DATE RECEIVED, REPLY BY, DAYS LEFT, REASON AND CODE, DISPUTE TYPE, CASE TYPE, AMOUNT, and CARD NUMBER AT TRANSACTION. A row is highlighted with a red border, showing a dispute with the reason 'Charge amount exceeds authorization amount-A01', type 'IQ', amount '\$203.00', and card number '700372XXXXXXX1003'. To the right of this row is a 'Print Preview' button with an 'X' icon. Below the table, the 'Dispute details' section explains the issue: 'The amount of the Authorization Approval was less than the amount of the Charge you submitted.' and provides 'Additional information: CARD MEMBER DONT RECOGNIZE CHARGE'. It also shows the 'Disputed amount' as '\$203.00' and the 'Chargeback amount' as '\$203.00'. A 'Card Member' section lists fields for Tracking number, Card Number, and Case type. Below this, a 'What you can do' section prompts the user to 'Please respond to this dispute and attach any documentation that may support your response.' and a 'What will happen' section states 'We will review your response and contact you if we need further information from you.' At the bottom, a table shows the dispute history with columns for DATE, STATUS CHANGE, DISPUTE TYPE, and DETAILS. The first entry is dated '4/4/2017' with a status change of 'Please respond' and a dispute type of 'Inquiry', with details 'Please respond to this inquiry by 4/25/2017 VIEW ALL'.

CASE NUMBER	STATUS	DATE RECEIVED	REPLY BY	DAYS LEFT	REASON AND CODE	DISPUTE TYPE	CASE TYPE	AMOUNT	CARD NUMBER AT TRANSACTION
[REDACTED]					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

Card Member
Tracking number
Card Number
Case type

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 interface for managing disputes. At the top, there are filters for 'TAKE ACTION' (1005), 'RESPONDED' (277), 'CLOSED' (39617), and 'ADJUSTMENTS' (4263). Below these are tabs for 'All', 'Unviewed', 'Viewed', and a 'How to respond to a dispute' button. The main section has three buttons: 'Agree to Full Refund', 'Respond' (highlighted in purple), and 'Respond offline'. The 'Respond' section is titled 'Respond' and includes a note: 'Choosing to respond means that you do not agree with the dispute.' It contains three numbered steps: 1. 'Please submit documentation that verifies the charge.' with links for 'View acceptable formats' and 'View required documents', and an 'Attach files' button. 2. 'Please enter your comments about this chargeback. You can select from saved comments.' with a text area labeled 'Additional comments'. 3. 'Enter initials to verify this information' with a text input field. A 'Submit' button is located at the bottom right. The bottom left corner shows '0/444'.

Disputes

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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.

Dashboard **Payments** **Disputes** **Attract Customers** **Resources**



LOCATIONS (11/11) **DATE**

TAKE ACTION 2992 **RESPONDED** 53 **CLOSED** 76870 **ADJUSTMENTS** 5

☒ All ☐ Unviewed ☐ Viewed | ☒ All ☐ Chargebacks ☐ Inquiries ☐ Case Updates **How to respond to a dispute**

Showing 1-20 of 2992

	Agree to Full Refund	Respond				
02/992						
	CASE NUMBER	STATUS	DATE RECEIVED	REPLY BY =	DAYS LEFT	REASON AND CODE
<input type="checkbox"/>	I#1					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#2					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#3					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#4					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#5					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#6					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#7					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#8					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#9					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#10					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#11					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#12					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#13					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#14					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#15					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#16					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#17					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#18					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#19					Charge amount exceeds authorization amount-A01
<input type="checkbox"/>	I#20					Charge amount exceeds authorization amount-A01

Group by Win/Loss

Group by Select to group by and by Select to group by

Detail level ☒ Summary ☐ Detailed

Status All

Dispute Type ☒ All Dispute Types

Locations ☒ All locations

Dates ☒ All dates

Records No Results

Report format ☒ .CSV ☐ .XLS ☐ .XLSX

Download reports

Logos and supplies

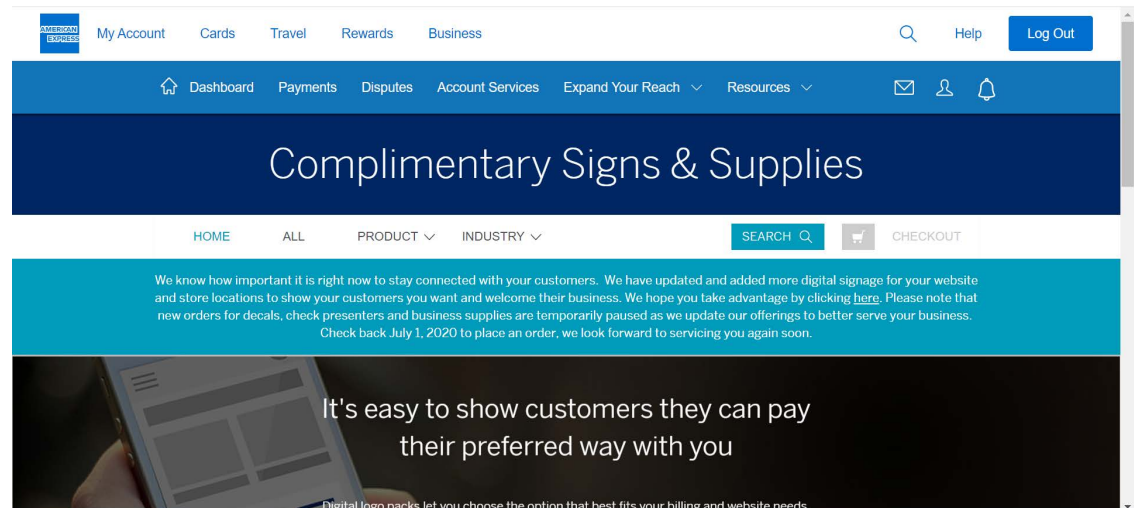
The fastest and easiest way to get merchandise and supplies for your business

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.



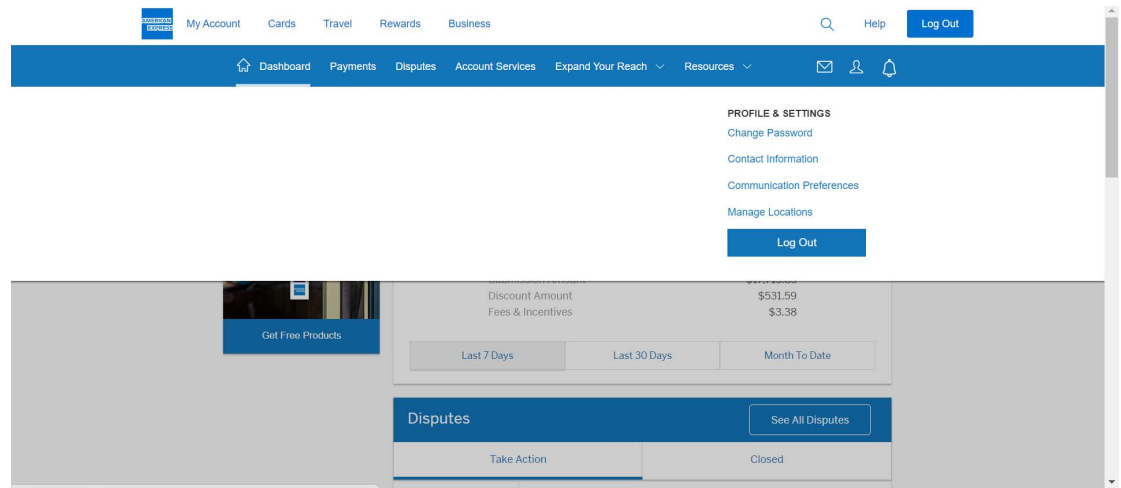
Profile and settings

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.

