

MerchantConnect Premium Quick Reference Guide



The online window to your payment processing account.



Quick Reference Guide

MerchantConnect Premium

Getting Started

- > When logging onto MerchantConnect Premium for the first time, you will need your user name and temporary password that was emailed to you in your "Welcome to MerchantConnect" email - sent to the email address you provided on your MerchantConnect Premium enrollment form.
- > If you did not receive a "Welcome to MerchantConnect" email, please contact your Account Rep, or Product Support at (800) 377-3962, Option 2, to verify your email address and update if necessary.

System Requirements

- > Microsoft Internet Explorer Version 5.5 or greater, or Netscape Version 5.0 or higher.
- > A browser capable of supporting 128 bit high strength encryption.
- > Internet access with a suggested connection speed of 56K. Speed and performance of the system will be best with a high-speed connection (T1, DSL, cable modem, etc).
- > Adobe Acrobat PDF Reader.
- > Suggested screen resolution of 1024 x 768

Logging On

- > In the address line of your browser, type www.merchantconnect.com, then hit [ENTER].
- > If you are logging on to MerchantConnect for the first time using your temporary password, you will be required to set up a new password. The new password must be between 8 - 12 alpha and numeric characters.
- > Passwords expire every 45 days.
- > You can change your password once per day, but must be logged in to do so.
- > If significant time has passed since you last logged on, you will be required to call into Product Support to reactivate your account.

Product Support

- > Product Support is available 24/7 for assistance with user names, passwords, and system navigation. To reach Product Support, dial (800) 377-3962 and select Option 2.
- > When contacting Product Support, please have your MerchantConnect user name and verification phrase readily available.

NOTE: ALL other inquiries, including merchant processing activity (deposits, chargebacks, etc), processing fees, or contractual questions should be directed to Customer Service at (800) 725-1243.

Access Level

- > One MerchantConnect Premium logon can provide access to one MID, multiple chains, or one entity. Your access level is determined based on how your merchant processing account is set up:
 - If all your payment processing occurs under one merchant account (MID), your MerchantConnect user name will provide access to that account.
 - If you have multiple merchant accounts for multiple locations, those accounts have likely been organized into a chain(s), and your MerchantConnect user name should provide access to chain level reports that combine the processing activity from various locations into one report.
- > If you do not see all of the locations you expected to see using MerchantConnect, contact your Account Rep or Product Support to change your level of access. If you have multiple locations or accounts, it may be necessary to have your accounts organized into a chain.

NOTE: Your Account Rep must “OK” and submit any changes to your access level in order to ensure that only appropriate persons have access to your data.

Site Organization

- > MerchantConnect is easy to use, and like other Internet sites, you can navigate within the application by clicking on the labeled buttons or the blue hyperlinks.
- > After logging on, you will see the MerchantConnect homepage. The homepage contains navigation across the top of the screen for **MY ACCOUNT**, **MY REPORTS**, and **SUPPORT**.

> My Account

My Account provides you with fast access to all the information you need to manage your account and ensure that you receive the best possible service. This section allows you to view or update your merchant profile, view your online statements, maintain account information, request new products, and receive equipment shipment status.

> My Reports

My Reports provides you with timely and secure accounting information including deposit summaries, transaction activity, chargeback and retrieval status and links to report sites for our Electronic Gift Card and Electronic Check Service programs.



- **Settlement**

Match the deposit amount in your checking account to settled transactions. You can summarize your transactions by card type and drill down to view transaction details.

Simply fill in the required fields to review deposit information for a specific location(s). Or if you would like to see a list of all locations available, click **[View Sub-Chains]**, then choose a specific location(s).

- **Interchange**

Summarize and search by downgrade reason for transactions that did not qualify for the best Interchange levels.

- **Transaction Search**

Search transactions by credit card, ticket number or authorization to find details about a transaction.

- **Chargebacks & Retrievals**

Stay on top of your chargeback and retrieval activity by pulling a case list by status or by viewing a summary report that groups cases by reason code. You can create a fax cover sheet when responding to a pending case.

- > **Support**

The Support area makes it easy to find comprehensive information about transaction processing, industry mandates, product support and practical tips for how to control processing costs and improve your bottom line.

- **The Equipment Support Area** provides you with detailed information about how to use your credit card terminal or payment processing software. You can even download Quick Reference Guides for our most popular solutions.
- **The Interchange Information Area** helps you better understand the rules and regulations that determine transaction pricing, including qualification categories, conditions and helpful procedures for specific industries.

Viewing Reports

- > Clicking the **MY REPORTS** button on the homepage will take you to the My Reports Landing Page. When you click on a specific report, you will be taken to a Parameter Page.
- > The Parameter Page is used to define the date range, location(s) for which you want to search, and any other options specific to that report (i.e. Authorization #, Card #). After specifying the search parameters for the report, click the **[SEARCH]** button at the bottom of the screen, which will generate and display the report.



NOTE: You can drill down to more detail by clicking on any of the hyperlinks within the report.

- > Depending upon your results, you will see an interior scroll bar or a report viewer on your screen.
- > The report viewer allows you to search or paginate through the report results using a search index.

Downloading Reports

- > Your reports can be downloaded in the following choice of formats:
 - MS Excel Spreadsheet (.xls)
 - Text Document (.txt or .csv)
 - Portable Document Format (.pdf) - *for statements only*
- > Typically report data and statements are available on-line for 12 months.

NOTE: If data is no longer available online, you can talk to your Account Rep about requesting custom research.

Printing Reports

Printing from Internet Explorer 6.0+:

- > Right click once within the report area. *The report area is displayed as yellow and white rows.*
- > Select [PRINT], then click [OK] to print report.

NOTE: If your report has more than 4 columns of data, you will need to change your print settings to **LANDSCAPE** in order to capture all the information shown.

Printing from Netscape:

- > In order to print table data, the main frame must be targeted to the printer. The list below indicates printing procedures for Netscape browsers.

Netscape Communicator 4.7 and higher

1. Use the mouse to right click on the table (report) that you want to print.
2. Select [Open Frame in New Window] from the menu box that appears
3. In the new window, select [File] from the top toolbar
4. Select [Print] from the menu box that appears
5. Click on [OK] to start printing
6. Close the new window to return to the application

Netscape Navigator 4.0

1. Select [File] from the top toolbar
2. Select [Print Frame] from the menu box that appears
3. Click on [OK] to start printing

