

# Reporting Solutions Overview

9/20/16



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Powering payments to grow your business / Powering payments

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# Reporting Solutions

## What Does MerchantConnect Provide?

- Reports, Account Info, Support
- Multiple Service Levels
  - Basic (Free)
  - Premium (Fee-based)
  - Premium with OCM (Fee-based)
- Online Access in Real-time
- Easy-to-understand Interface
- Secure Password Protection
  - Secured Cardholder Data

The screenshot displays the MerchantConnect website. At the top left is the MerchantConnect logo with the tagline 'The Online Window to Your Payment Processing Account.' To the right is a photo of a woman working at a laptop. Below the logo is a welcome message: 'Welcome to MerchantConnect. This site contains all the information you need to manage your electronic payment activity.' A navigation bar on the right contains 'MERCHANT LOGIN' with fields for 'User ID' and 'Password', a 'login' button, and links for 'register', 'forgot password?', and 'ocm demo'. Below the login bar is a date 'Tuesday, December 22, 2015' and a 'MERCHANT NEWS' section with three articles. The main content area has three sections: 'MY ACCOUNT' with a 'Proceed to My Account' link, 'MY REPORTS' with a 'Proceed to My Reports' link, and 'SUPPORT' with a 'Proceed to Support' link. A small graphic of three colored squares (red, blue, blue) is at the bottom left of the page.

**MerchantConnect**  
The Online Window to Your Payment Processing Account.

Welcome to MerchantConnect. This site contains all the information you need to manage your electronic payment activity.

**MERCHANT LOGIN**  
User ID   
Password   
  
[register](#) [forgot password?](#) [ocm demo](#)

Tuesday, December 22, 2015

**MERCHANT NEWS**

**Attention Equinox/Hypercom Terminal Users:** We've learned about an industry-wide outage affecting Equinox/Hypercom 4200 series terminals. To resolve the issue, you'll need to download a software update to your terminal. Please [click here](#) for instructions on how to update your software.

**>> Want to accept chip cards?** Visit [www.chipcardsuccess.com](#) to update your terminal software, find out your options, and learn more about chip card technology.

**>> UnionPay:** Want more business? [Click here](#) to learn more about UnionPay and the benefits of accepting this card brand.

**>> Amex Payment Network Specific Information:** For any Amex Payment-Network specific information, including the operating rules and regulations as well as PCI Data Security Standards information, [click here](#).

**It's fast. It's easy. It's secure. Connect today!**

**We need your feedback! [Take our short survey](#)**

**MY ACCOUNT**  
View or update information about your account. Find copies of statements, make changes to your account, and find out about valuable products and services to help your business.  
[Proceed to My Account](#)

**MY REPORTS**  
View recent deposits and other information about your account activity, including batch details, chargeback and retrieval status and deposit history.  
[Proceed to My Reports](#)

**SUPPORT**  
Find news and information to help manage payments at your business. Learn how to best qualify transactions, reduce risk, and manage chargebacks. You will also find reference guides to help operate your payment terminal.  
[Proceed to Support](#)

# Reporting Solutions

## What Does MerchantConnect Provide?

- Merchant News
- Interchange Information
  - How to qualify for the best rate
- Chargeback and Retrieval Process
- Compliance and Data Security Information
- Product Support
- Merchant Training
- Cardholder Bank Lookup



### How can I make certain my transactions qualify at the best rate?

Interchange and Card Association fees vary in amount based on industry type, the degree to which cards are authorized, and the timeliness of remitting a sale for payment. There are several rates that may apply to your transactions, depending on your method of processing each transaction. When setting rate qualification criteria, the card associations consider the card product used in the transaction, how the transaction data is entered into the terminal, the time of settlement versus time of authorization.

Download our helpful Interchange Guide ([English Español](#)) for an overview of Interchange criteria and important information about your transactions or review the [pricing structure](#) for the Debit Networks.

For questions or more information regarding Interchange and the impact on your business please email [customerservice@merchantconnect.com](mailto:customerservice@merchantconnect.com). Please include your Merchant ID.

# Reporting Solutions

## MerchantConnect Premium (Enterprise Solution)

- Consolidated Reporting
  - MID-level reporting as well as information by chain, parent chain and entities
- One Year of Data Storage
- Search and Filter Functionality
- Additional and More Detailed Reports
  - Qualification reporting, detailed chargeback and retrieval information
- Data Export Via Excel or CSV



# Reporting Solutions

## Online Case Management

Efficiently view, respond and manage chargebacks and retrieval requests

Welcome Julie Smith | Message Center | Manage Your Account | Logout | Help

MerchantConnect

Current View : System

Case Management

Case Management Home | Assignment | Queue Management | Response Management | Reporting | Case Search

Welcome to Case Management

Where you can quickly, easily and securely manage chargeback activity and respond to copy requests before they become chargebacks. Depending upon your level of access, you can view cases with supporting documentation, create responses, manage work queues or view detailed reporting.

**Case Management**  
Quickly and easily view a listing of cases and various details for each case including supporting or previously submitted responses. Case management allows you to:

- ▶ View Assigned Cases
- ▶ View Unassigned Cases
- ▶ Response Submission Status
- ▶ Chargeback Search
- ▶ Retrieval Search

**Queue Management**  
Effectively manage chargeback activity and copy requests by creating queues based upon your business processes. Here you can:

- ▶ Create Queues
- ▶ Modify Queues
- ▶ Prioritize Queues

**Key Metrics**

	Case Count	Case Amount
Total Assigned Cases	0	
Total New Cases Available	1	87.00 US
Total Existing Cases Available	3	648.40 US
Cases Responded Prior Day	0	
Cases Responded YTD	28	11,059.92 US
Cases Due Next 5 Days	0	

# Reporting Solutions

## Online Case Management

- **Workflow Management**

- Manage case workflow for greater efficiency
- Actionable user work grids
- Case status: new, viewed, accepted, responded to, reversed or debited
- Aging case alerts and notifications

- **Queue Management**

- Create, name and define a queue by various attributes
- Prioritize queues or assign specific cases to users

- **Response Management**

- Template letters streamline responses to acquirer
- Assisted response rules allow for quick case response

- **Broad Selection of Reports**

# Reporting Solutions

## Custom Reporting

- **Secure FTP Delivery of Raw Payment Data**
  - Used for AR mapping and account reconciliation
  - Windows-based software interface
- **Custom Reporting**
  - Work with Client Support Specialists to determine exact data needed

