Using Dispute Manager Transcript

Dispute Manager is a highly secure web enabled front- end interface to help merchants and or clients effectively manage sales disputes, chargebacks and retrievals, with greater efficiency in a real-time environment. Merchant Services created this web-based tool to help merchants simplify back office processes and expedite response time on retrieval and chargeback disputes. The Dispute Manager service also provides data and information to merchants to help them gain control of their sales dispute expense management.

After this course, you'll be ready to describe what Dispute Manager is and how it assists with chargebacks and retrievals. Execute the signup process with Business Track to access Dispute Manager, and recognize and describe the key functions of the system.

Objectives

- What is Dispute Manager?
- Signing Up with Business Track
- Dispute Manager Functions Overview

What is Dispute Manager?

It doesn't matter who you process your credit cards with, you will probably encounter customer disputes. Whether they are fraudulent charges from an internet site, a stolen card, or an honest mistake, managing disputes on a timely basis can help minimize losses.

Benefits of Dispute Manager include:

- Improved Sales Dispute Management
- Decreased Chargebacks
- Enhanced financial controls
- Ease of Use for dispute management

A dispute occurs when a customer challenges all or part of a purchase. This triggers the bank to send out a Retrieval. A Retrieval is a request for documentation of the transaction, like a signed copy of the receipt. The merchant must respond within the bank's time frame. If not the Retrieval becomes a "Chargeback" and they remove the disputed funds from the Merchant's bank account.

EPX Merchants can leverage Dispute Manager to handle these situations. It keeps track of disputes, retrieval requests, chargeback documentation, status & next steps. Dispute Manager features online help and a full search functionality to view past disputes. It also manages related documents like sign receipt images or other proof of purchase documentation that you upload. When accessing Dispute Manager, we recommend using Internet Explorer. Select the right arrow icon to continue.

Signing Up with Business Track

Signing up for Dispute Manager is easy. Go to www.businesstrack.com and select Enroll.

Choose Sign up with your Merchant Account. Make sure you have this information handy:

- Your Epicor Payment Exchange Merchant ID, or “MID” for your primary account.
- The bank account number associated with your deposited funds.
- And your business Tax ID.

Complete all fields, except the Bank Sort Code/Transit# field, and select Create Account.

BusinessTrack.com will send you 2 separate emails. One contains your User ID and the other has a temporary password, Typically your User ID will be “cl” followed by portions of your first and last name plus a number, and the other has a temporary password.

Open the emails and follow the instructions. If you do not see the emails in your inbox, Check your junk mail folder. After clicking the Access Business Track link in your email, your browser will open BusinessTrack at the initial login window. Choose Merchant Login.

Enter your assigned User ID and temporary password. Then create and confirm a new password. Now log into Business Track with the new password. Check your email for a 6-digit code to enter into your browser. You must follow this process and enter a 6-digit code every time you log in to BusinessTrack. Read and accept the Terms and Conditions.

We recommend that once you log in, you set up 3 daily Email Alerts. Begin by clicking Manage Preferences button. Next choose Yes for each of the three options: Statement Available, Daily Account Summary, Dispute Activity Summary.

If you wish, you can change the settings later after reviewing the information. Select Next, then Confirm.

Once you have completed the steps above, access ClientLine software or Dispute Manager from the drop-down selection in the Applications menu tab. Selecting the Chargebacks link in the Disputes section also brings you to Dispute Manager.

Dispute Manager Functions Overview

Once you log into in Dispute Manager, the Welcome tab displays. Notice these buttons here. They display on all screens, and provide helpful features like Refresh, quick access to Online help, a Search Function, and switching your Merchant Login to a different location. Useful quick links display on the left including the Dispute Manger User Guide, Merchant Dispute Guide, Reason Code Listings, and Online Help.

To view current disputes, select the Queues tab. The Queues tab contains 3 sections. The Queue Selector, the Work Tracker and the lower half which displays existing cases after selecting a queue to view. The Work Tracker shows cases worked on that day that have been either accepted or disputed. Use the dropdown to filter by case type. The Queue Selector shows all categories that currently contain dispute cases. Select a category to view the respective cases in the Queue Worklist on the bottom half of the screen. Dispute cases display along with their details like Due date, and case number. Select the icon on the left of a case to open the Cases tab and view more details.

Here you can view files related to the case. View details about the chargeback. Select each of the number sections to see info related to: Case Information, Secondary Information, First Chargeback, and Second Chargeback details. The tabs on the bottom enable you to investigate or resolve the case in question. These tabs include: User Notes Transactions and credit, Authorization Records, Actions, and Messages.

Use the Action tab to carry out Chargeback and Retrieval Actions including, but not limited to: Dispute or Reverse chargeback, Accept Charge back, Issue a Retrieval Response, mark the status of a Retrieval Request, or add user notes and images. For more details on the specifics of each action, review the Dispute Manager User Manual.

Recap

You've completed the using dispute manager course. You should now be able to describe what Dispute Manager is and how it assists with chargebacks and retrievals. Perform the signup process with Business Track to access Dispute Manager, and recognize and describe the key functions of the system.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298