Epicor Payment Exchange Online Tools Transcript

Epicor Payment Exchange offers tools that allow you to analyze and reconcile your bankcard activity.

You can view settled transactions with both AccessOne and ClientLine.

You can also easily respond to chargebacks or retrieval requests with Dispute Manager.

Let's compare each tool and then explore logging into AccessOne, adding users, other basic AccessOne navigation and finally examine the AccesOne reporting tools.

Objectives

- Tools Overview
- Logging Into AccessOne
- Adding Users
- Navigating AccessOne

Tools Overview (AccessOne, Clientline, and Dispute Manager)

AccessOne and BusinessTrack's ClientLine are the choices offered when it comes to managing daily bankcard activity. Both provide information about your settled batches, funding history, and processor statements. AccessOne, is the more widely used of these two reporting tools.

AccessOne is available online, using most any browser. It provides you with, batch settlement confirmation, payment history, access to monthly processing statements and it offers a user-friendly transaction search. AccessOne is a 'reporting tool' only and does not allow you to change or delete bankcard information. It also does not allow you to enter new bankcard transactions.

If you incur a chargeback and need to dispute it, use Dispute Manager. It is specifically designed to help you quickly respond to chargebacks and retrieval requests. Dispute manager may be used with either AccessOne or ClientLine.

Logging into AccessOne

Once your business is live processing, Epicor Payment Exchange sets a flag enabling the owner or primary contact of your business to establish login credentials.

When the flag is set, an email is automatically generated and sent to the primary contact's email as listed on the merchant account .

Look for an email like the one shown here.

The sender displays as "on behalf of at your access one dot com" and the subject line contains "New Password Notification".

If the primary contact of your business cannot locate this email, please search the 'junk mail' or 'spam' folders.

When you open the New Password Notification email, it will instruct you to click a link to set up your new password.

Keep in mind that the initial New Password Notification email is only sent to the person identified as the primary contact for your business.

Once the primary contact establishes the master account, you can set up additional users.

When you click the email link, the screen shown here displays.

The User Name for the main account will be the 12 digit Merchant ID for the primary business account.

This usually begins with 1911 or 1912 followed by 8 additional digits.

Enter your First Name and Last Name in the appropriate fields.

The Current Password field automatically populates with the temporary password from the email you were sent. These dots represent the temporary password.

Enter your New Password.

Even though on-screen text says that your password must be at least 8 characters long; This must actually be 9-20 characters and include an alpha character, a number, and a special character.

In addition, you may include no more than 2 repeating characters.

As a heads-up, you will need to change this password again a later in this process.

Re-type your password in the Confirm New Password field.

Verify your Email address and enter your contact telephone number in the Phone field.

Choose a security Question and then enter your Answer which is cap sensitive.

Tap Submit.

Once you complete registering, the system requires you to register for multifactor authentication. This process is nearly identical to the one you just completed.

Select Register

Enter your login credentials and email address. Then select Submit.

The system tells you that you were sent a new password email. Select Close, and find that email in your inbox.

Click the link in that email and complete the form like you did before. You will need to enter a new password that is different than the one you used the first time.

Once you submit the form, you'll see a prompt for a once time password. Go to your email and find the new email with the one-time password. Copy and Paste or enter it in the ONE TIME Passcode field.

Click Verify

After the initial setup, make sure to log out and log back in to test your login.

If you forget your password, click the Forgot your password? link.

Just so you know, the system may prompt you every 60 days to change your password .

Multiple locations can be linked together and access them through a single login or merchant ID.

You will only have to manage a single username and password across all locations. To make login easy, Bookmark or Add the URL to your browser favorites.

Click the arrow to continue.

Adding Users

Log into the administrator account using the 12 digit merchant ID for your primary account.

Note that only the administrator can add new users.

Bankcard reports are confidential information and should be shared only with trusted individuals within an organization.

Click on the Admin tab, hover your mouse over User Maintenance and then select Manage Users.

From the Manage Users screen tap the CREATE NEW USER button.

Create a unique User Name for the individual being granted rights to AccessOne.

Enter the new user's First Name, Last Name and Email address.

The Active radio button is checked by default. You cannot delete users but selecting the Inactive button revokes their access.

Regarding the Access Functions, View Dashboard allows users to see the homepage summary.

Export Data enables them to export reports to an Excel spreadsheet.

and Site Jump allows the user to move from one location's reports to another when more than 1 merchant ID or location is used for the business.

We typically recommend checking all three of these boxes when adding a user.

Finally, click SUBMIT and the system sends a new password notification with an embedded password to the user.

The email will not include the User Name so be sure to let the new user know what that is.

Click the arrow to move to the next section.

Navigating AccessOne

When you log into AccessOne, the Dashboard displays with an overview of your bankcard activity.

To return to this Home page at any time click on the Epicor Payment Exchange logo in the upper left corner.

At the top of the page, you will find five tabs:

- The Merch Info tab displays either a list of all locations that you can access from the current login, or location-specific information.
- The Reports tab contains sub-menus for: Batch History, Payment History, Transaction Search, Retrievals & Chargebacks and other useful reports.
- Select the Statements tab for easy access to your monthly processing statements.
- And, the Admin tab is your path to view important Messages, and for User Maintenance functions .

The EXPORT button is available on many screens and reports.

Just select the preferred format.

Depending on your browser you may see your data immediately displayed or the download displays in the lower left. The current month displays by default. Click the word FILTER to display search fields.

Select the radio buttons and fill in required fields to reset or change the data selection criteria.

When you have made the changes click the SEARCH button.

The 'drill down' indicator or link allows you to view additional details or other screens.

These fields are identified by the dotted underlines below a field title or field value as shown here.

When you click on the link, the screen ether changes to display more detailed information or it opens another window related to the selected field.

At the bottom of larger reports, the screen may indicate it is only displaying the first of few pages of the total number of records.

To choose which page to view click on the arrows to move one page at a time, or select a specific page number.

Change the Results per page drop down to display more records.

Throughout AccessOne's reports you can left click on a specific column heading to sort the data in descending order.

Click again to sort in ascending order.

Recap

Utilize AccessOne, ClientLine and Dispute Manager to ensure your bankcard activity is accurate.

We discussed signing in to AccessOne, adding users, and explored basic navigation.

Complete the full training Agenda to take advantage of all the EPX tools available.

Documentation for all topics covered in this course is available at this URL.

https://www.epicor.com/en-us/collections/retail/credit-card-processing/

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.

Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298