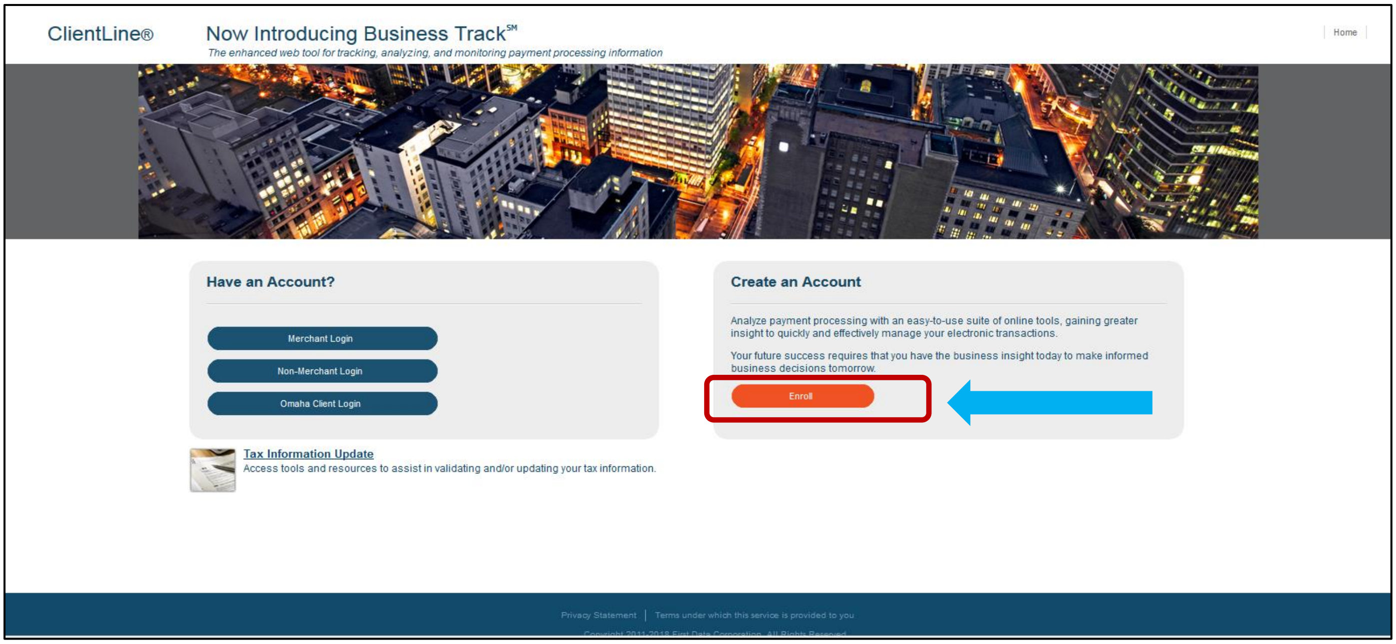
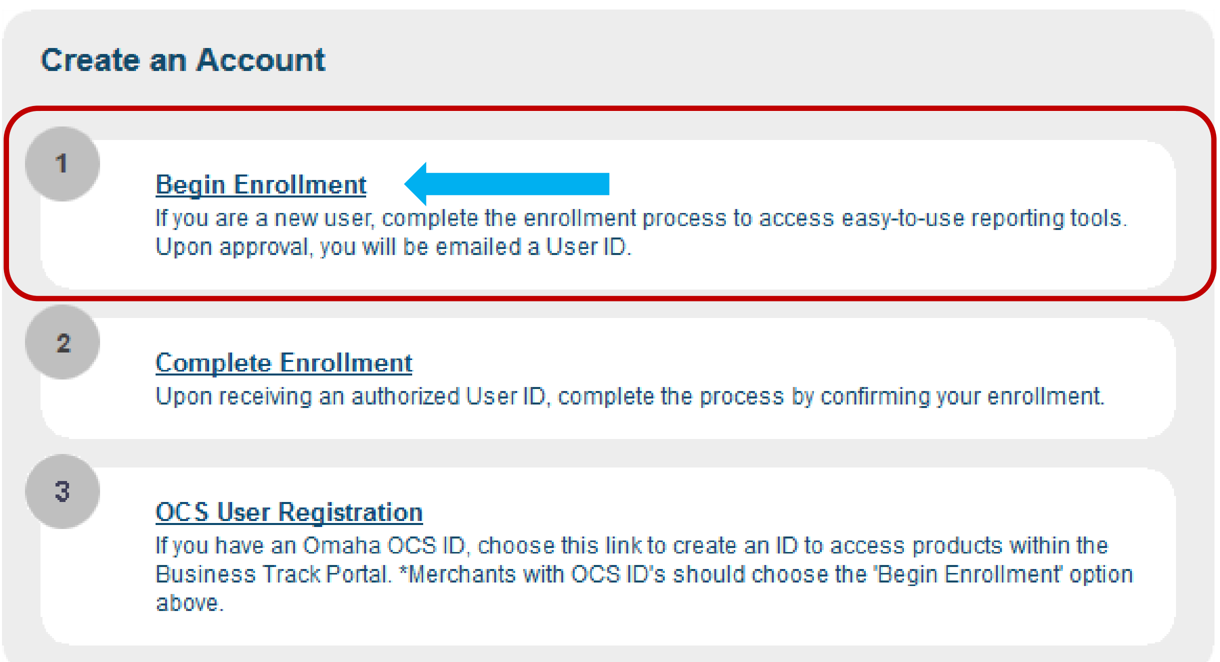
Business Track Merchant Enrollment

Begin Enrollment:

A merchant can self-enroll for Business Track at www.businesstrack.com select the 'Enroll' button.

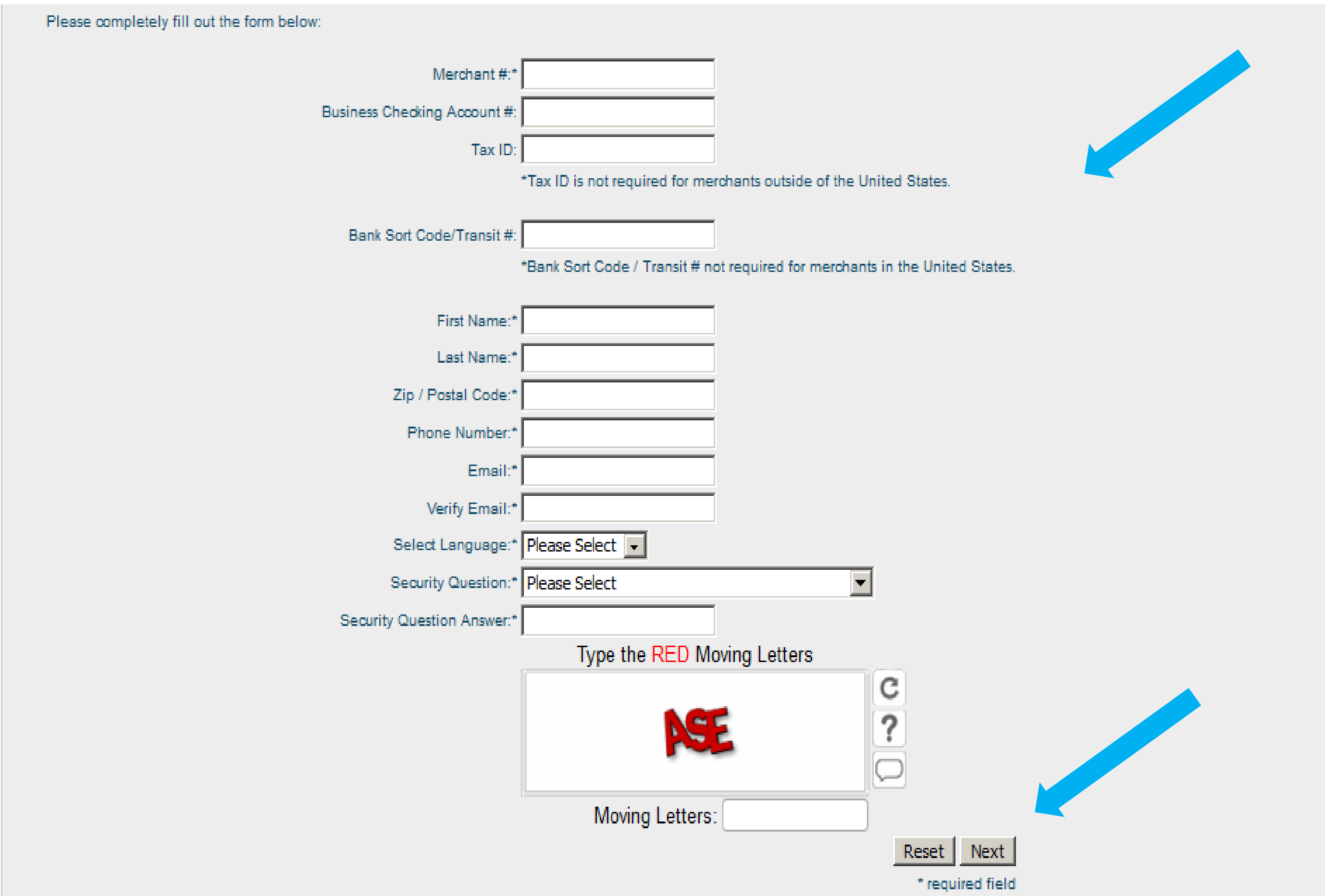


Select 1 Begin Enrollment.

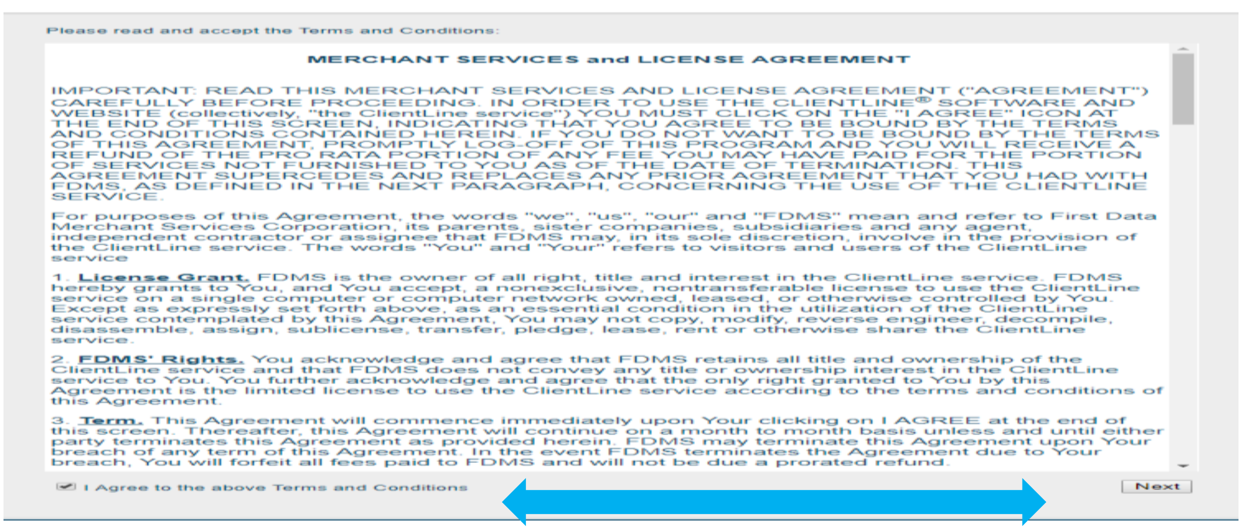


Business Track Merchant Enrollment

- **Complete all fields on the Enrollment form. Once complete select Next.**
  - **Business Checking Account - Also known as Direct Deposit Account or DDA.**
  - **Tax ID – Tax ID is not required for merchants outside of the United States.**
  - **Bank Sort Code/Transit# - Also called the ABA number or ABA Transit Number and is not required for merchants in the United States.**



Read the Terms and Conditions, check the box beside 'I Agree to the above Terms and Conditions' and select Next.



Please read and accept the Terms and Conditions:

MERCHANT SERVICES and LICENSE AGREEMENT

IMPORTANT: READ THIS MERCHANT SERVICES AND LICENSE AGREEMENT ("AGREEMENT") CAREFULLY BEFORE PROCEEDING. IN ORDER TO USE THE CLIENTLINE® SOFTWARE AND WEBSITE (collectively, "the ClientLine service") YOU MUST CLICK ON THE "I AGREE" ICON AT THE END OF THIS SCREEN, INDICATING THAT YOU AGREE TO BE BOUND BY THE TERMS AND CONDITIONS CONTAINED HEREIN. IF YOU DO NOT WANT TO BE BOUND BY THE TERMS OF THIS AGREEMENT, PROMPTLY LOG-OFF OF THIS PROGRAM AND YOU WILL RECEIVE A REFUND OF THE PRO RATA PORTION OF ANY FEE YOU MAY HAVE PAID FOR THE PORTION OF SERVICES NOT FURNISHED TO YOU AS OF THE DATE OF TERMINATION. THIS AGREEMENT SUPERCEDES AND REPLACES ANY PRIOR AGREEMENT THAT YOU HAD WITH FDMS, AS DEFINED IN THE NEXT PARAGRAPH, CONCERNING THE USE OF THE CLIENTLINE SERVICE.

For purposes of this Agreement, the words "we", "us", "our" and "FDMS" mean and refer to First Data Merchant Services Corporation, its parents, sister companies, subsidiaries and any agent, independent contractor or assignee that FDMS may, in its sole discretion, involve in the provision of the ClientLine service. The words "You" and "Your" refers to visitors and users of the ClientLine service

1. **License Grant.** FDMS is the owner of all right, title and interest in the ClientLine service. FDMS hereby grants to You, and You accept, a nonexclusive, nontransferable license to use the ClientLine service on a single computer or computer network owned, leased, or otherwise controlled by You. Except as expressly set forth above, as an essential condition in the utilization of the ClientLine service contemplated by this Agreement, You may not copy, modify, reverse engineer, decompile, disassemble, assign, sublicense, transfer, pledge, lease, rent or otherwise share the ClientLine service.

2. **FDMS' Rights.** You acknowledge and agree that FDMS retains all title and ownership of the ClientLine service and that FDMS does not convey any title or ownership interest in the ClientLine service to You. You further acknowledge and agree that the only right granted to You by this Agreement is the limited license to use the ClientLine service according to the terms and conditions of this Agreement.

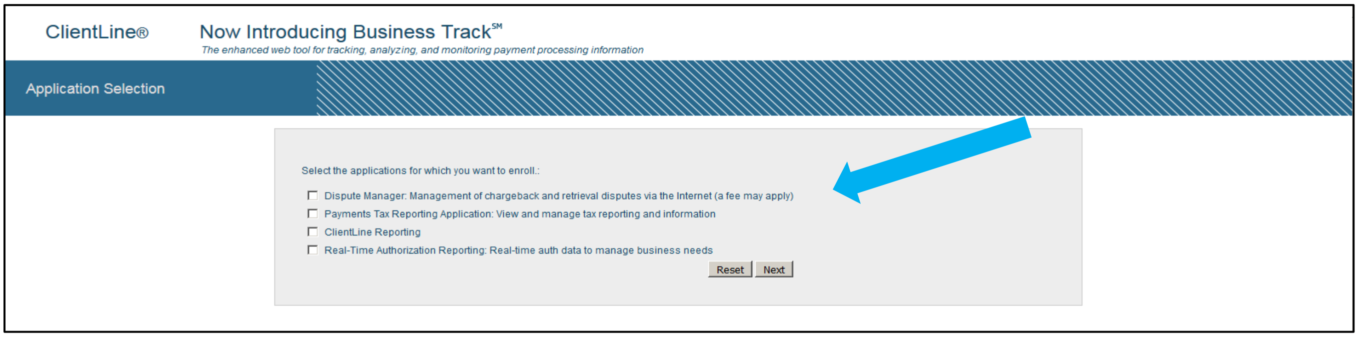
3. **Term.** This Agreement will commence immediately upon Your clicking on I AGREE at the end of this screen. Thereafter, this Agreement will continue on a month to month basis unless and until either party terminates this Agreement as provided herein. FDMS may terminate this Agreement upon Your breach of any term of this Agreement. In the event FDMS terminates the Agreement due to Your breach, You will forfeit all fees paid to FDMS and will not be due a prorated refund.

I Agree to the above Terms and Conditions

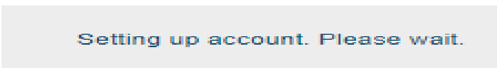
Next

Business Track Merchant Enrollment

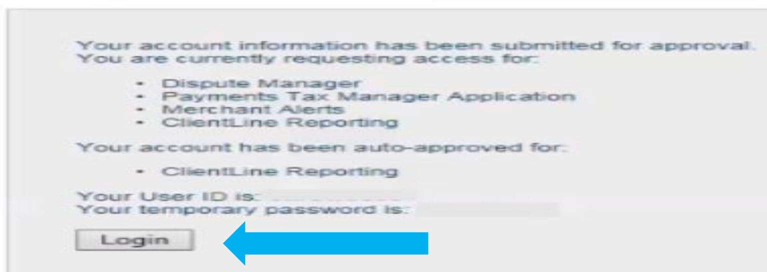
You will be prompted to select the available applications you would like to enroll in and select Next.

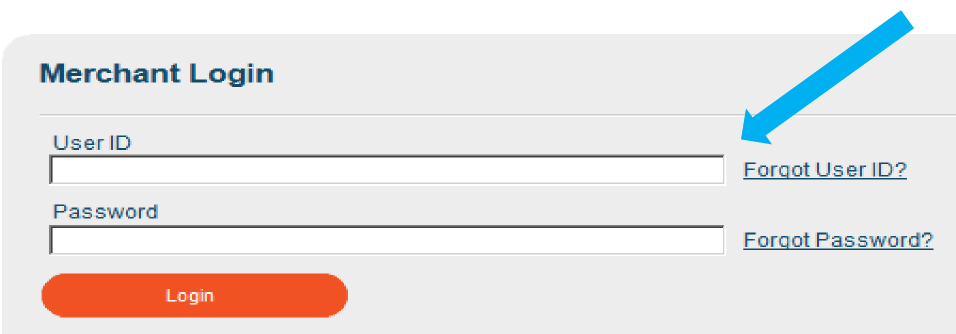


A message will appear while your request is processing.

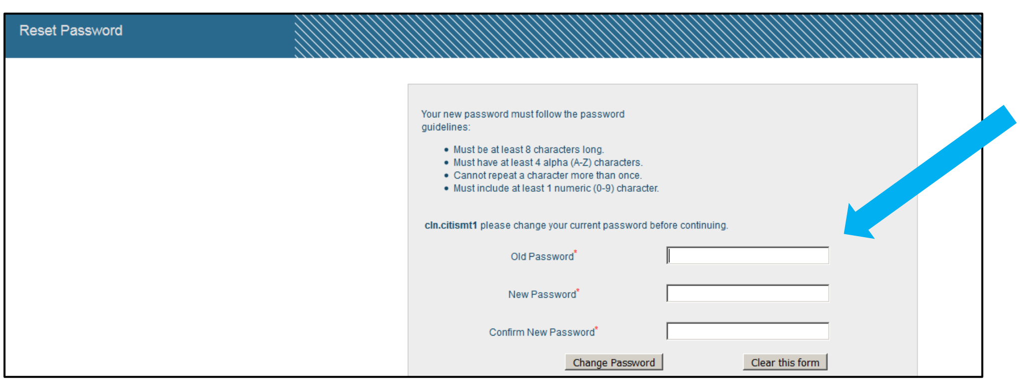


If your request was auto-approved, you will receive your Business Track user ID and password. Select Login. If your request was not auto approved, it will be reviewed and an email will be sent.





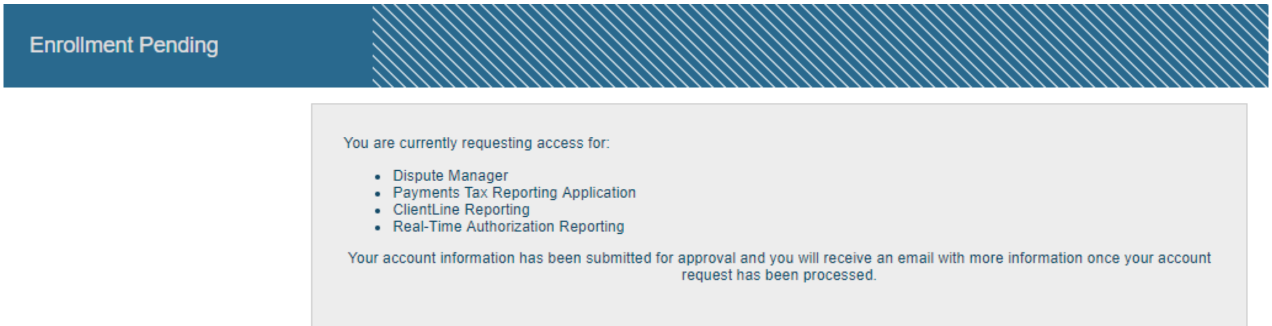
Enter your Business Track user ID and temporary password and select Login.



Enter the temporary password, put in your new password twice and select Change Password.

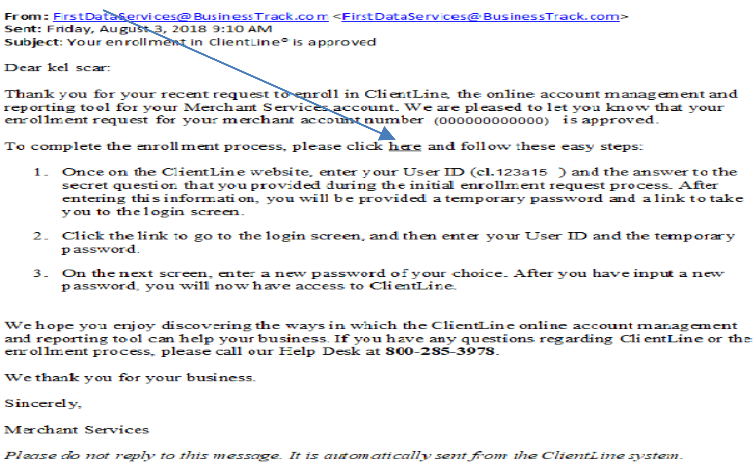
Business Track Merchant Enrollment

In some cases, applications need to be reviewed. Once reviewed you will receive an email within 24-48 hours. The below message will appear:



Once you receive your email follow the instructions to complete enrollment.

Click **here** (in the email).



From: FirstDataServices@BusinessTrack.com <FirstDataServices@BusinessTrack.com>
Sent: Friday, August 3, 2018 9:10 AM
Subject: Your enrollment in ClientLine® is approved

Dear kel scar:

Thank you for your recent request to enroll in ClientLine, the online account management and reporting tool for your Merchant Services account. We are pleased to let you know that your enrollment request for your merchant account number (000000000000) is approved.

To complete the enrollment process, please click here and follow these easy steps:

1. Once on the ClientLine website, enter your User ID (cl.123a15) and the answer to the secret question that you provided during the initial enrollment request process. After entering this information, you will be provided a temporary password and a link to take you to the login screen.
2. Click the link to go to the login screen, and then enter your User ID and the temporary password.
3. On the next screen, enter a new password of your choice. After you have input a new password, you will now have access to ClientLine.

We hope you enjoy discovering the ways in which the ClientLine online account management and reporting tool can help your business. If you have any questions regarding ClientLine or the enrollment process, please call our Help Desk at 800-285-3978.

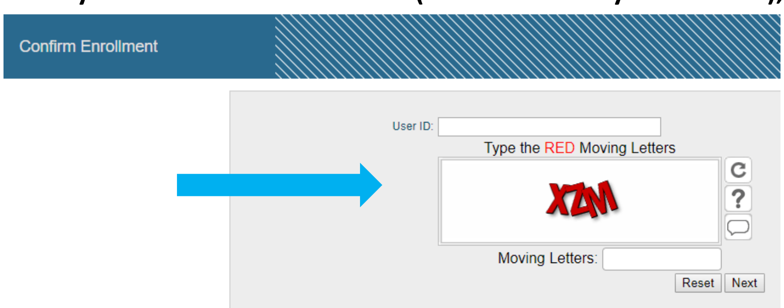
We thank you for your business.

Sincerely,

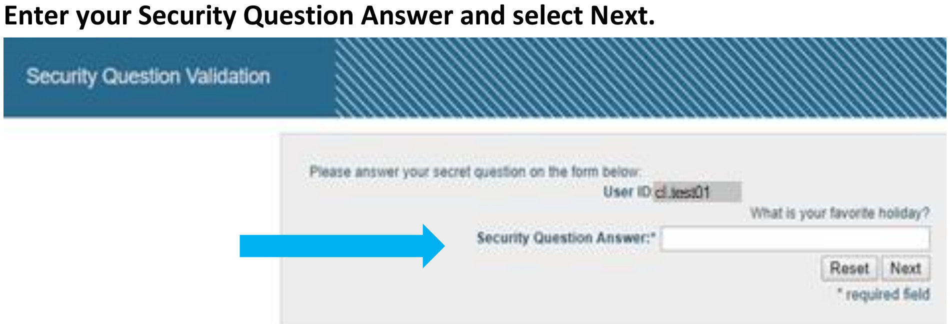
Merchant Services

Please do not reply to this message. It is automatically sent from the ClientLine system.

Enter your Business Track user ID (from the email you received), CAPTCHA (red moving letters), and select Next.



Enter your Security Question Answer and select Next.



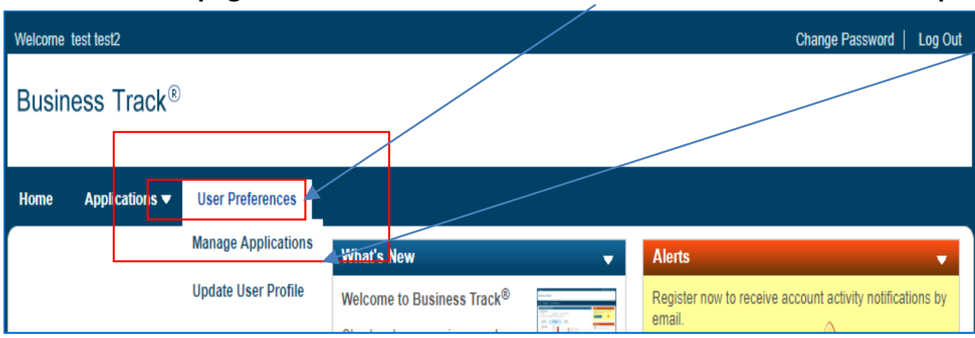
Business Track Merchant Enrollment

Once you have completed the enrollment process you will be logged and your Business Track dashboard will display. See example below.

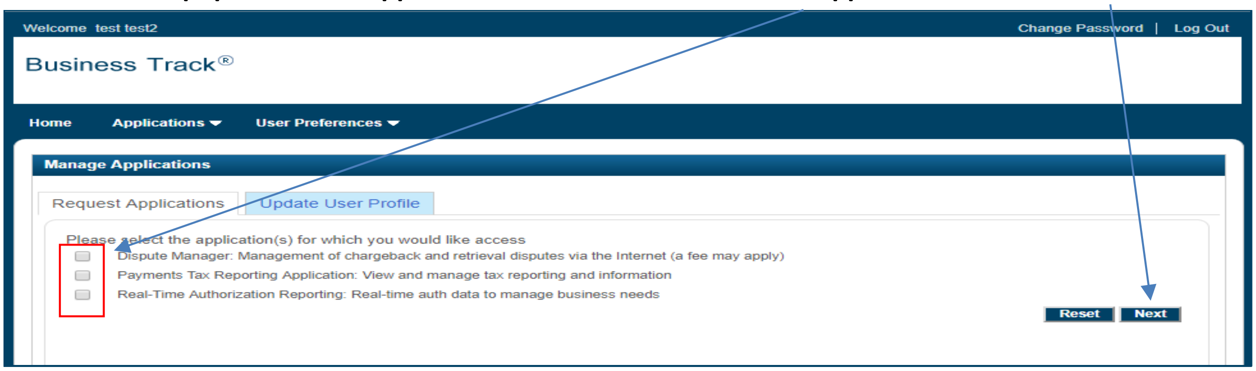
Business Track Merchant Enrollment

How to add an application to my Business Track User ID:

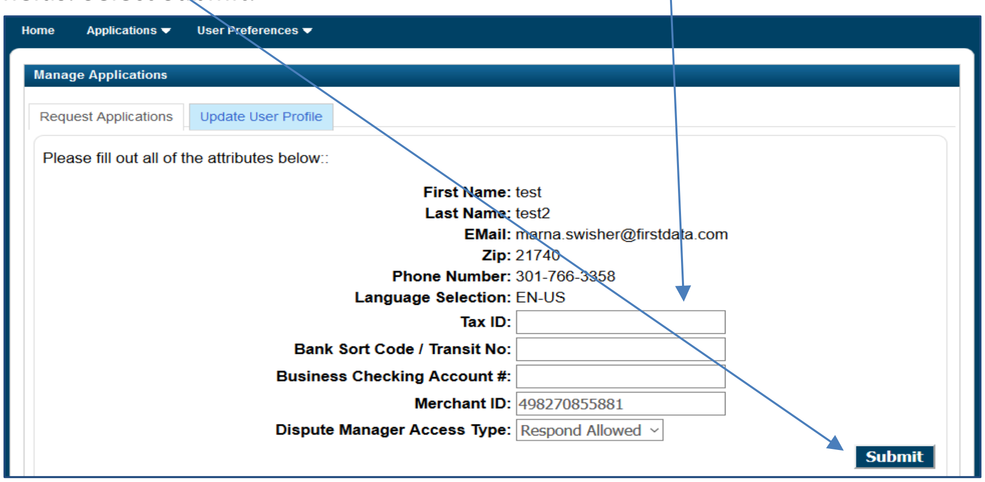
From the home page of Business Track select User Preference and on the drop down select Manage Applications.

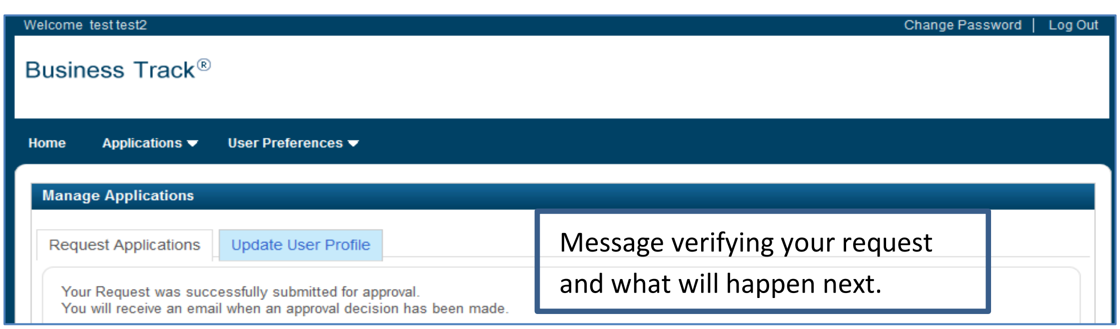


A window will pop with what applications are available. Check the applications and select next.



In the next window you will need to enter your Tax ID and Checking Account number and fill in any other required fields. Select Submit.

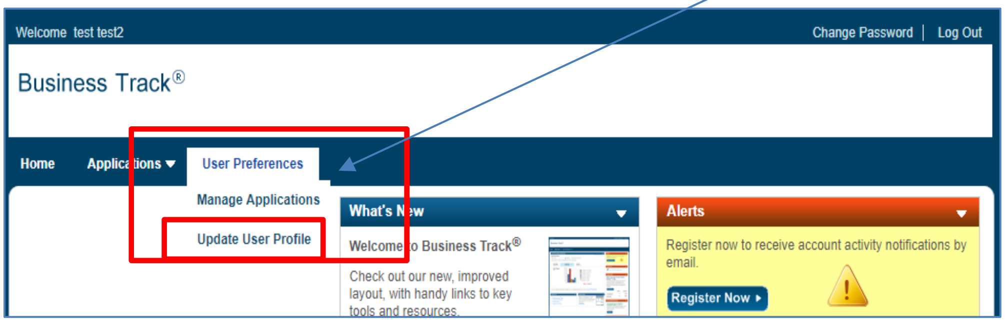




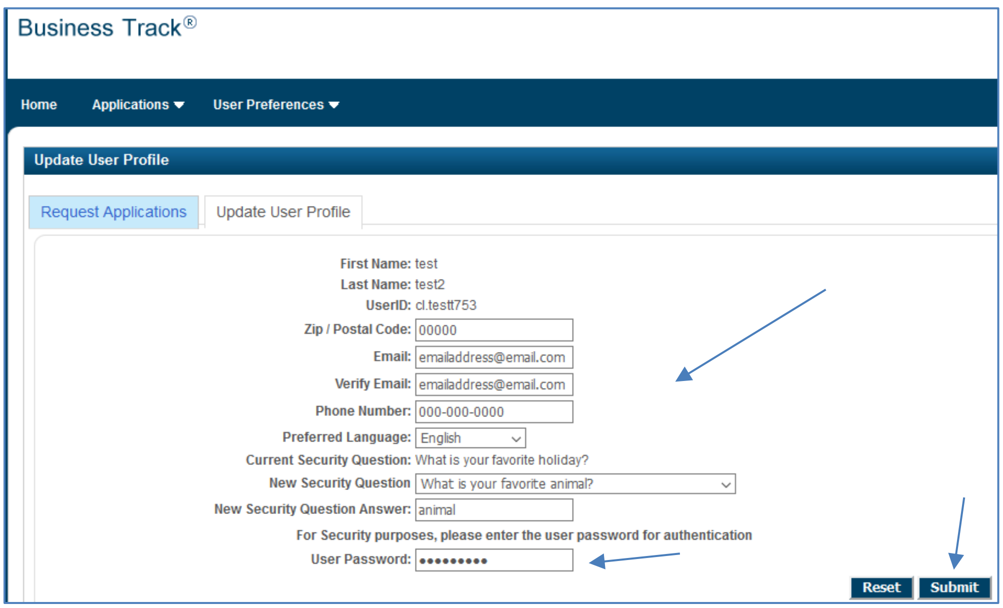
Business Track Merchant Enrollment

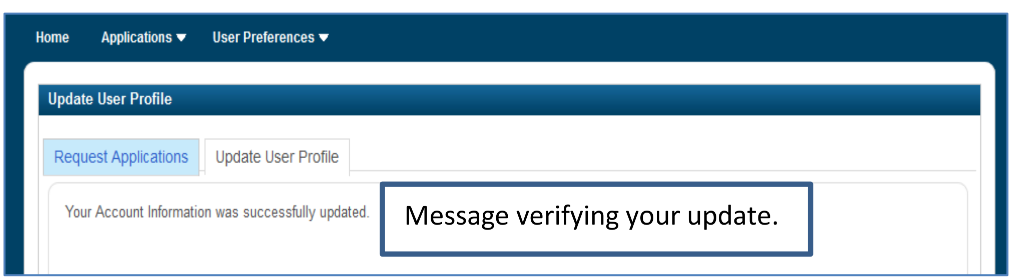
Update Business Track User ID Profile: You can update your zip code, email address, phone number, preferred language, security question and answer.

From the home page of Business Track select User Preference and on the drop down select Update User Profile.



A window will pop make your updates, enter your password and submit.





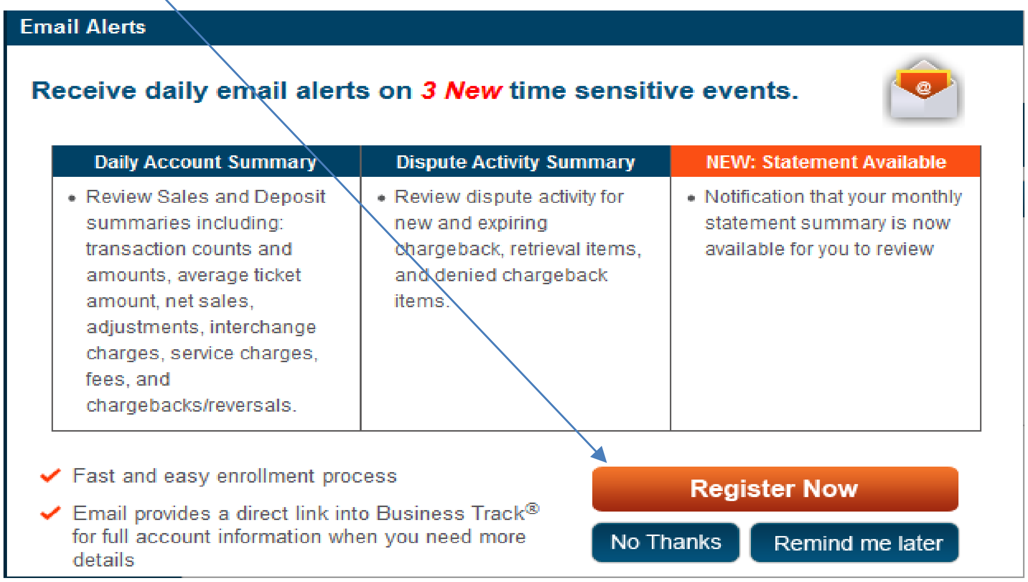
Business Track Merchant Enrollment

How to enroll in Merchant Alerts:

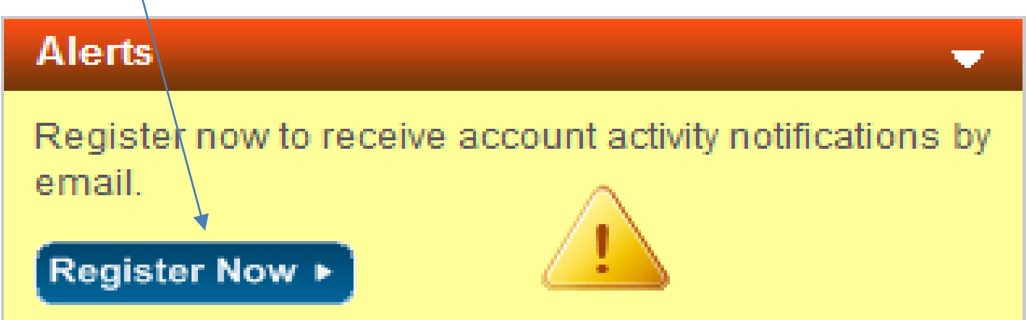
- **Statement**
- **Daily Account Summary**
- **Dispute Activity Summary**

Register for Email Alerts:

Option 1 - When you first log in to Business Track you may be presented with a pop up window for Email Alerts you can register now, no thanks or remind me later.



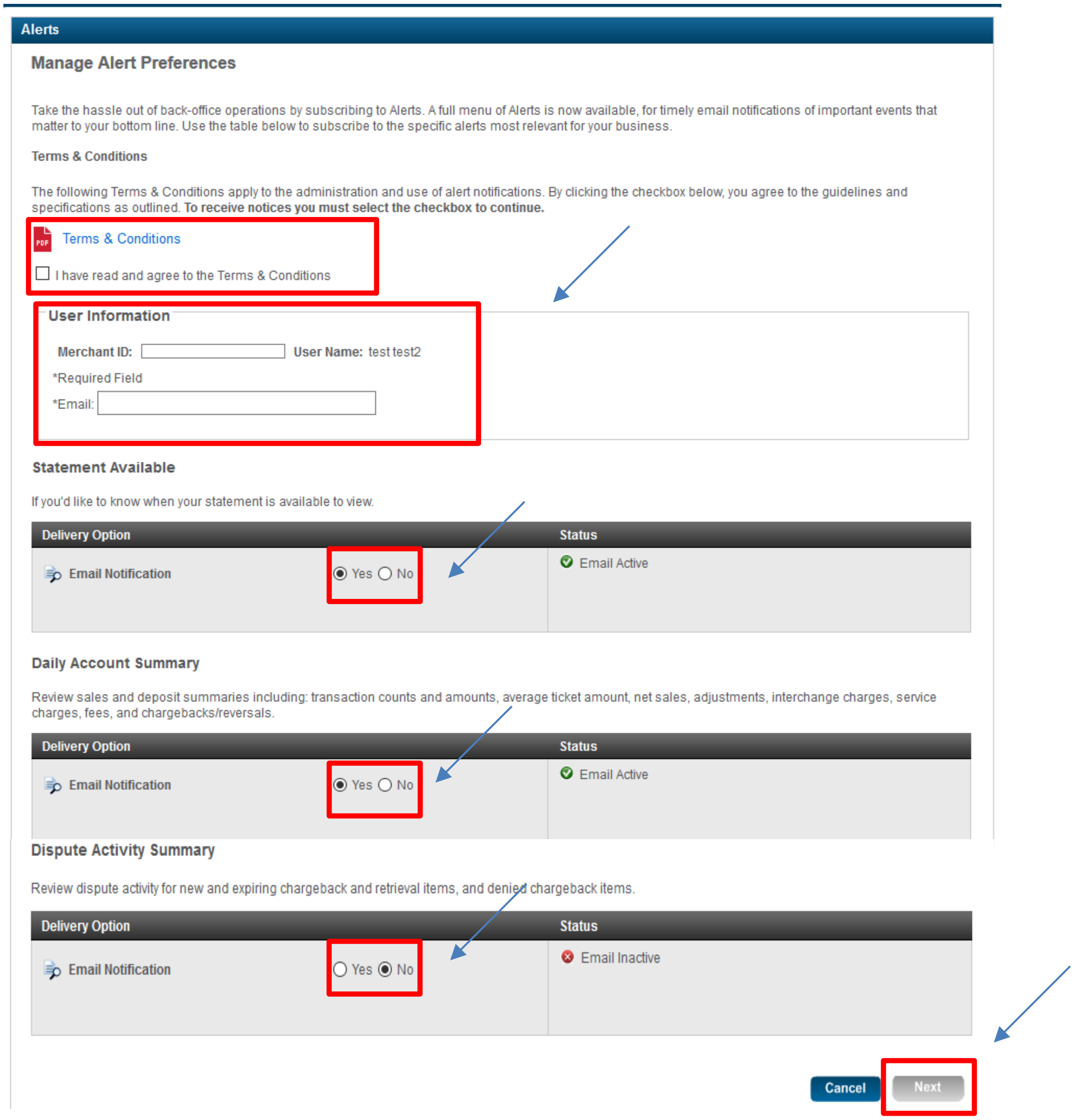
Option 2 - To register for Email Alerts and you are logged in to Business Track from your home page you can select Register Now on the Alerts portlet.



Business Track Merchant Enrollment

If you select register now from the portlet or the window you will be directed to the Manage Alert Preferences page.

Read and accept Terms and Conditions and confirm merchant ID and Email address. Select yes for the Email Notifications you want to receive and select next.



Review your selections and email address, select back to make changes or select confirm. With qualifying activity, you will see alerts within 24 to 48 hours.