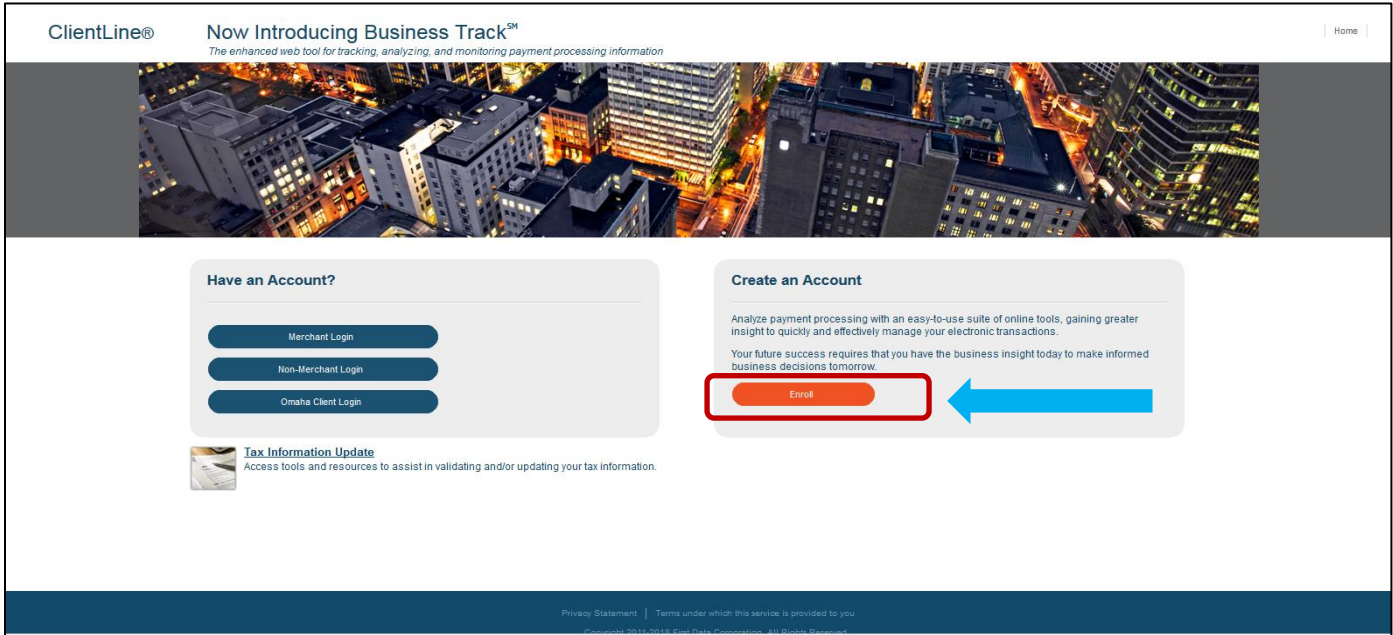


Business Track Merchant Enrollment

Begin Enrollment:

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



Select **1** Begin Enrollment.

Create an Account

- 1** **Begin Enrollment** ←
If you are a new user, complete the enrollment process to access easy-to-use reporting tools. Upon approval, you will be emailed a User ID.
- 2** **Complete Enrollment**
Upon receiving an authorized User ID, complete the process by confirming your enrollment.
- 3** **OCS User Registration**
If you have an Omaha OCS ID, choose this link to create an ID to access products within the Business Track Portal. *Merchants with OCS ID's should choose the 'Begin Enrollment' option above.

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.

Please completely fill out the form below:

Merchant #:*

Business Checking Account #:

Tax ID:

*Tax ID is not required for merchants outside of the United States.

Bank Sort Code/Transit #:

*Bank Sort Code / Transit # not required for merchants in the United States.

First Name:*

Last Name:*

Zip / Postal Code:*

Phone Number:*

Email:*


Verify Email:*

Select Language:* Please Select

Security Question:* Please Select

Security Question Answer:*

Type the RED Moving Letters



Moving Letters:

* required field

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

Business Track Merchant Enrollment

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

ClientLine® Now Introducing Business Track™
The enhanced web tool for tracking, analyzing, and monitoring payment processing information

Application Selection

Select the applications for which you want to enroll:

- Dispute Manager: Management of chargeback and retrieval disputes via the Internet (a fee may apply)
- Payments Tax Reporting Application: View and manage tax reporting and information
- ClientLine Reporting
- Real-Time Authorization Reporting: Real-time auth data to manage business needs

Reset Next

A message will appear while your request is processing.

Setting up account. Please wait.

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.

Your account information has been submitted for approval. You are currently requesting access for:

- Dispute Manager
- Payments Tax Manager Application
- Merchant Alerts
- ClientLine Reporting

Your account has been auto-approved for:

- ClientLine Reporting

Your User ID is: _____
Your temporary password is: _____

Login

Merchant Login

User ID _____ [Forgot User ID?](#)

Password _____ [Forgot Password?](#)

Login

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

Reset Password

Your new password must follow the password guidelines:

- Must be at least 8 characters long.
- Must have at least 4 alpha (A-Z) characters.
- Cannot repeat a character more than once.
- Must include at least 1 numeric (0-9) character.

cin.citismt1 please change your current password before continuing.

Old Password* _____

New Password* _____

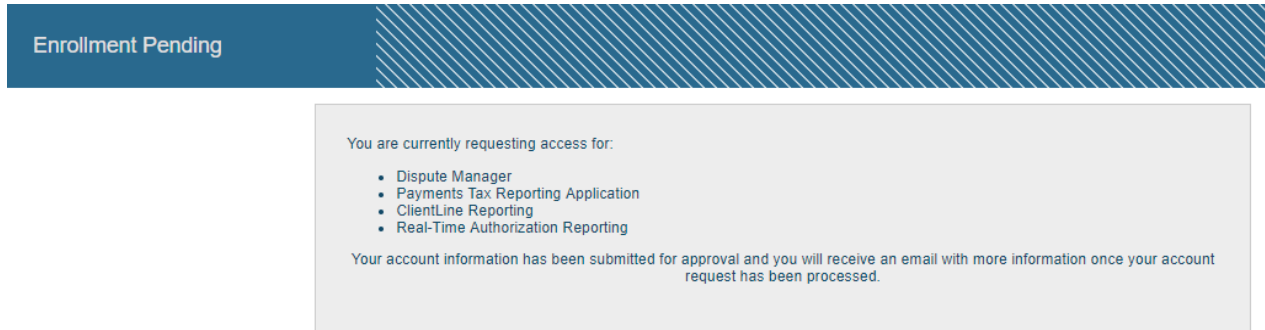
Confirm New Password* _____

Change Password Clear this form

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

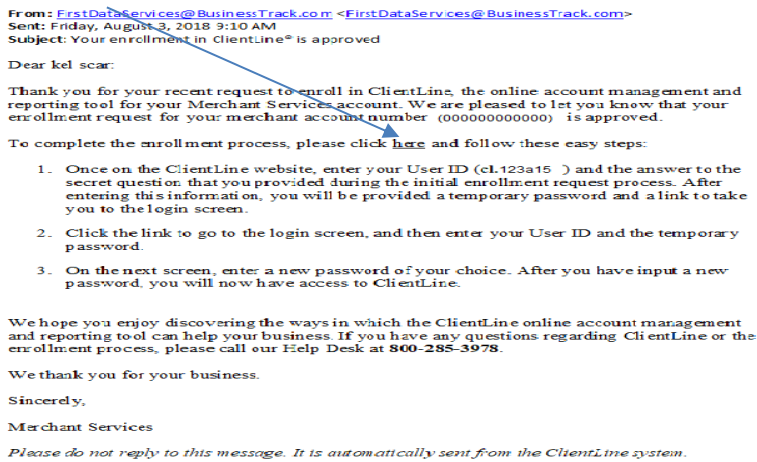
Business Track Merchant Enrollment

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

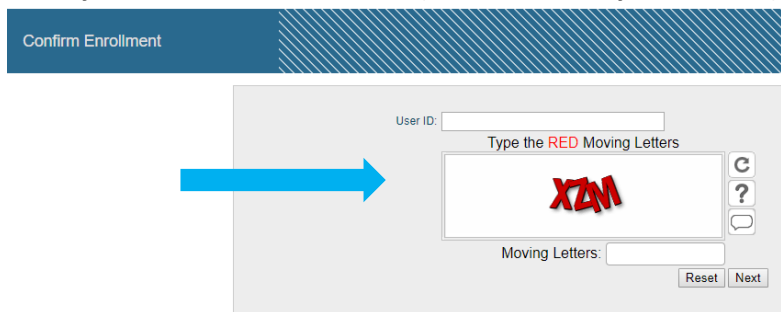


Once you receive your email follow the instructions to complete enrollment.

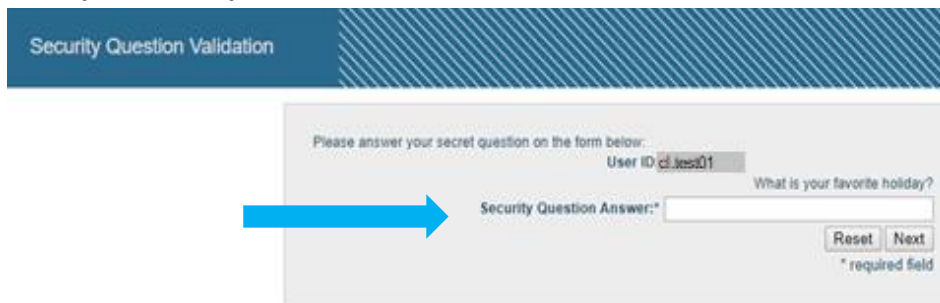
Click [here](#) (in the email).



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®

Home Applications User Preferences



Use this powerful payment terminal to simplify your business. [Learn more about Clover® Mini](#)

Resources

- Your Payments Acceptance Guide
- Interchange Qualification Matrix
- Interchange Rate/ Fee Schedule
- American Express Program Pricing Guide
- Spring Association Release Summary
- Fall Association Release Summary
- High Risk Merchant Registration Form
 - Data File Manager™ Tutorial

What's New

Visa Claims Resolution

IMPORTANT

As a result of Visa Claims Resolution (VCR), there will be upcoming changes to the Dispute process. VCR is a global mandate initiated by Visa to redefine the dispute process. Please click on the link for additional information related to these changes.

For additional information about VCR or available product solutions, please contact your Relationship Support Team.

[Learn More about VCR](#)

Business Track® Mobile Application

Now it's easier and more convenient than ever to access important Business Track data that helps drive your business. Download the free app now.



[Learn More about Business Track Mobile](#)

[Learn More about Clover Mini](#)

Alerts

Manage alert preferences and receive notifications by email for activities on your account.

[Manage Preferences](#)

Statement

- Card Processing Statements
- How to Read Your Statement

Transaction Search

Card Holder or Token Search

Select card type

[Submit](#) [Clear](#)

Disputes (0)

The Chargeback and Retrieval Data reflects the total outstanding cases current to date. Information is updated daily and may not reflect new cases received from the Card Associations on responses processed today.

	Count	Amount
Chargebacks	0	0.00
Retrievals	0	0.00

Equipment and Supplies

Supplies and Equipment Order History: Review information on recent orders.

Check out our online store for your merchant supply resources. Easy one stop shopping for paper and ink supplies.

[Online Store](#)



Tax Information

[Tax Home Page](#)

Access and manage your tax information. View tax validation reports, gross reportable sales report and retrieve a copy of your 1099-K.

[Form 1099-K eConsent](#)

Enroll and manage Form 1099-K electronic consent settings. Access available Form 1099-K documents

Clover® Security Plus

Clover Security Plus is our dynamic security and compliance offering that helps protect your business and simplifies your process to become PCI compliant. Clover Security Plus helps to minimize data risks allowing you more time to focus on growing your business.

[Access Now](#) 

Contacts  Customer Service 800-916-6264

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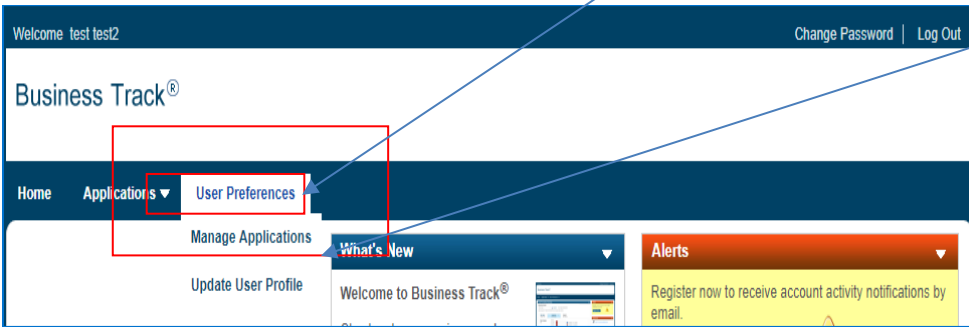
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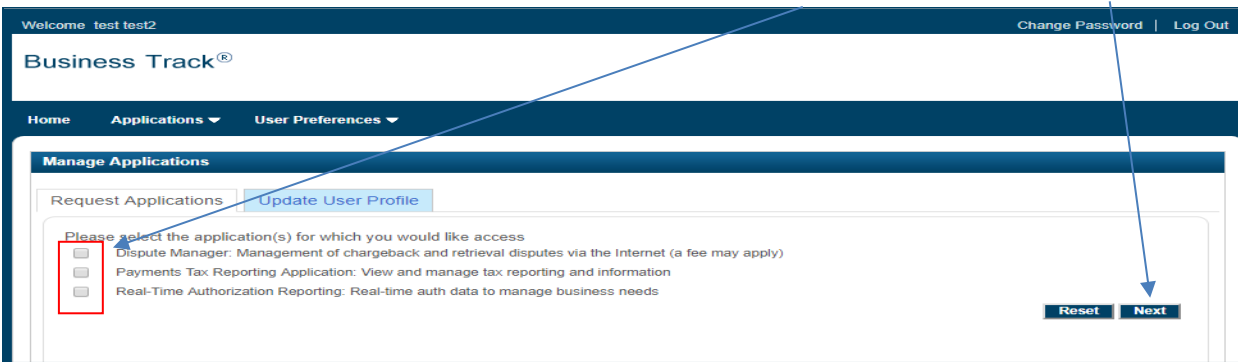
Business Track Merchant Enrollment

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

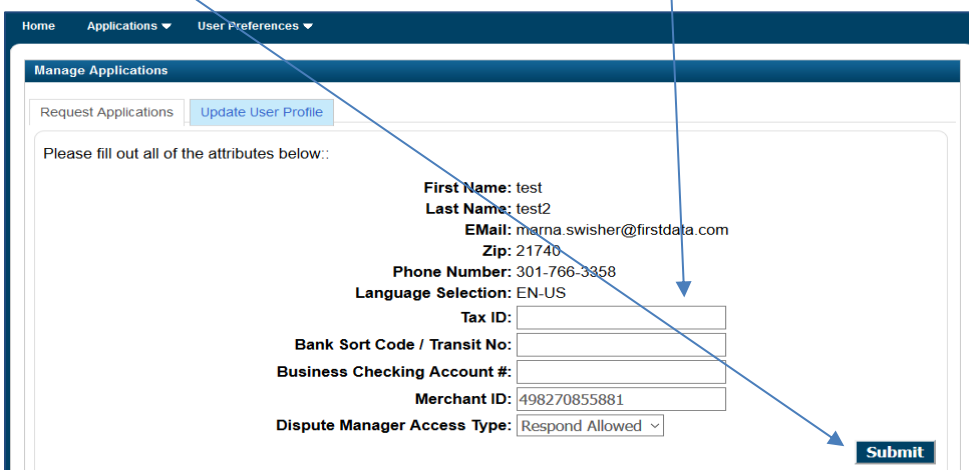
From the home page of Business Track select User Preference and on the drop down select Manage Applications.



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



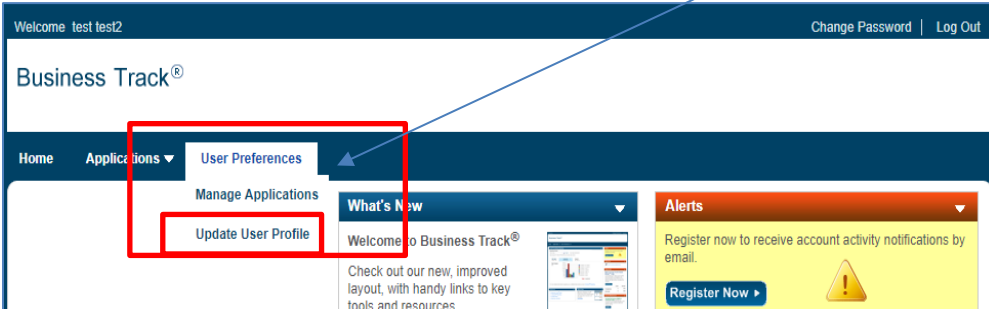
In the next window you will need to enter your Tax ID and Checking Account number and fill in any other required fields. Select Submit.



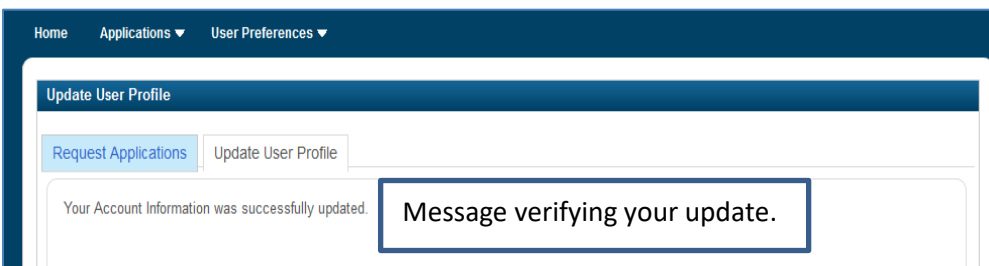
Business Track Merchant Enrollment

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.

A screenshot of the 'Update User Profile' form. The form contains several input fields: 'First Name: test', 'Last Name: test2', 'UserID: cl.testt753', 'Zip / Postal Code: 00000', 'Email: emailaddress@email.com', 'Verify Email: emailaddress@email.com', 'Phone Number: 000-000-0000', 'Preferred Language: English', 'Current Security Question: What is your favorite holiday?', 'New Security Question: What is your favorite animal?', 'New Security Question Answer: animal', and 'User Password:'. There are 'Reset' and 'Submit' buttons at the bottom right. Blue arrows point to the 'Update User Profile' tab, the 'User Password' field, and the 'Submit' button.

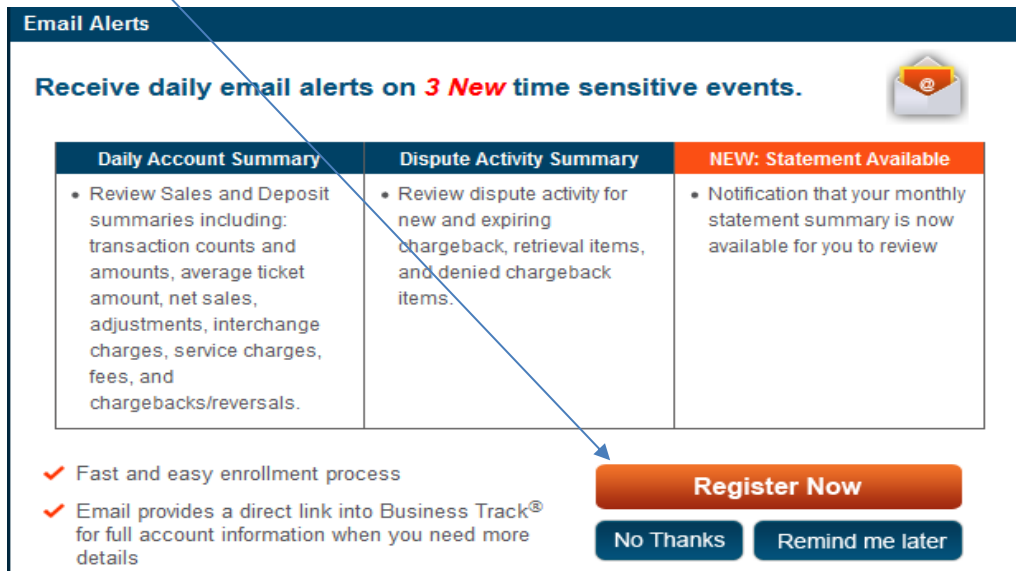
Business Track Merchant Enrollment

How to enroll in Merchant Alerts:

- Statement
- Daily Account Summary
- Dispute Activity Summary

Register for Email Alerts:

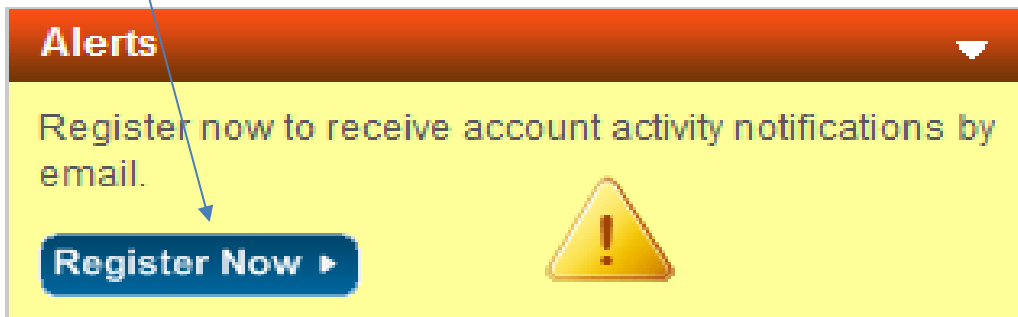
Option 1 - When you first log in to Business Track you may be presented with a pop up window for Email Alerts you can register now, no thanks or remind me later.



The screenshot shows a pop-up window titled "Email Alerts" with a blue header. Below the header, it says "Receive daily email alerts on 3 New time sensitive events." with an envelope icon. A table lists three alert types: "Daily Account Summary", "Dispute Activity Summary", and "NEW: Statement Available". Below the table are two checkmarks: "Fast and easy enrollment process" and "Email provides a direct link into Business Track® for full account information when you need more details". At the bottom right are three buttons: "Register Now", "No Thanks", and "Remind me later". A blue arrow points from the text above to the "Register Now" button.

Daily Account Summary	Dispute Activity Summary	NEW: Statement Available
<ul style="list-style-type: none">Review Sales and Deposit summaries including: transaction counts and amounts, average ticket amount, net sales, adjustments, interchange charges, service charges, fees, and chargebacks/reversals.	<ul style="list-style-type: none">Review dispute activity for new and expiring chargeback, retrieval items, and denied chargeback items.	<ul style="list-style-type: none">Notification that your monthly statement summary is now available for you to review

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.



The screenshot shows an "Alerts" portlet with a yellow background and a blue header. It contains the text "Register now to receive account activity notifications by email." and a blue "Register Now" button with a right-pointing arrow. To the right of the button is a yellow warning triangle icon. A blue arrow points from the text above to the "Register Now" button.

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.

Alerts

Manage Alert Preferences

Take the hassle out of back-office operations by subscribing to Alerts. A full menu of Alerts is now available, for timely email notifications of important events that matter to your bottom line. Use the table below to subscribe to the specific alerts most relevant for your business.

Terms & Conditions

The following Terms & Conditions apply to the administration and use of alert notifications. By clicking the checkbox below, you agree to the guidelines and specifications as outlined. **To receive notices you must select the checkbox to continue.**

Terms & Conditions

I have read and agree to the Terms & Conditions

User Information

Merchant ID: User Name: test test2

*Required Field

*Email:

Statement Available

If you'd like to know when your statement is available to view.

Delivery Option		Status
Email Notification	<input checked="" type="radio"/> Yes <input type="radio"/> No	✔ Email Active

Daily Account Summary

Review sales and deposit summaries including: transaction counts and amounts, average ticket amount, net sales, adjustments, interchange charges, service charges, fees, and chargebacks/reversals.

Delivery Option		Status
Email Notification	<input checked="" type="radio"/> Yes <input type="radio"/> No	✔ Email Active

Dispute Activity Summary

Review dispute activity for new and expiring chargeback and retrieval items, and denied chargeback items.

Delivery Option		Status
Email Notification	<input type="radio"/> Yes <input checked="" type="radio"/> No	✘ Email Inactive

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.

Home Applications User Preferences

Alerts

Confirm Alerts Notification Selections

You have signed up to receive the following Alert(s).

You can update your preferences at any time by logging into Business Track® and selecting Manage Preferences in the Alerts section of the dashboard.

Email: emailaddress@email.com

Alert

- Statement Available
- Dispute Activity Summary
- Daily Account Summary