Elavon Connect

Customer User Guide

Preface

This document describes step-by-step procedures on how to use your Elavon Connect including:

- Product overview
- Dashboard options
- Statements and transactions
- Reports
- Account settings and maintenance
- Marketplace information

This document is intended for Customer Manager and Customer Employee user of the Elavon Connect product and contains the information necessary for you to be able to use all the features of the product effectively.

Typographical Conventions

Throughout this guide, you will see words and phrases that appear in different fonts and formats. The following list describes the typographical conventions used in this guide.

- Bold text - Indicates a menu option, a window title, buttons, and so on that you can use to identify a part of the user interface.

Example: **Print** or **Save As** dialog box

- Menu selection sequences

Indicates a series of menu options that you need to select in a particular sequence and listed in a single step. Each menu option is separated by an arrow (→).

1. Choose **File** → **Save As** → **File Name** and enter the name of the document.

- Italicized text

Indicates that the word or phrase is a reference to another document as illustrated below.

Refer to the *Elavon User Guide*.

Contents

Chapter 1: Introduction

What is Elavon Connect?

Elavon Connect is an interactive customer portal that empowers you to manage all aspects of your payments business. Designed to be intuitive and easy to use, the portal gives you secure online access to your business information, as well as enrichment features like engaging articles, important notifications and offers tailored to you. Utilize functions that integrate into your everyday workflow, such as e-mail alerts when statement is ready. With Elavon Connect, you can run your business knowing that you have online account management, customizable reporting, and self-help resources available at your fingertips. Grow your business with confidence. Your payments, your portal.

Features Available in Elavon Connect

Elavon Connect is an online portal that enables users to manage data. Users are empowered to self-serve without needing to call Customer Support for basic activities. The following is available:

- view account information, statements, and payments activity
- manage company and personal profiles
- manage users and locations
- manage notification preferences
- generate, view and download reports
- request changes and update accounts such as DDA and email addresses

Roles available in Elavon Connect

There are two roles available for customers in Elavon Connect: Employee role and Manager role.

Manager role

Having an access to this role you will be able to add other users to your account, and select which MIDs these users can access to. When you create any additional user on your account, they will be granted employee permissions by default. You can update this at any time, by adding other location or changing their role to Manager.

A user with a Manager Role have the visibility of all user that have access to their locations, they are also able to access the details of all users they have created themselves. They can see last access date, they can update assigned location, change entitlement role from employee to manager or vice versa or they can delete a user if employee leave the company and no longer require access to the portal.

Employee Role

An employee role user does not have access to Business Locations or User Management sections. They have restricted access and they cannot add new user to a location. An employee user has access to generate reports and statements of the locations their manager has granted them access to.

System Requirements

You can access Elavon Connect from your desktop, laptop, tablet, or even your mobile device.

Although you can use most any device to view Elavon Connect, the best experience is with Google Chrome.

- Microsoft Edge
- Chrome 79.0x
- Mozzilla Firefox

Supported Operating Systems

The system supports the following operating systems

- Windows 10x
- Mac OS X

Chapter 2: Getting Started

The Getting Started chapter provides information that you need before you are able to start using Elavon Connect.

Starting Elavon Connect

You can access Elavon Connect through your desktop (PC) or mobile device (iOS, Android, or tablet) though internet browser.

1. To launch Elavon Connect, type https://www.elavon.co.uk in your browser window. The **Elavon main site** opens.
2. Select your country and language (if the system does not automatically default to your language). [1]

Notes:

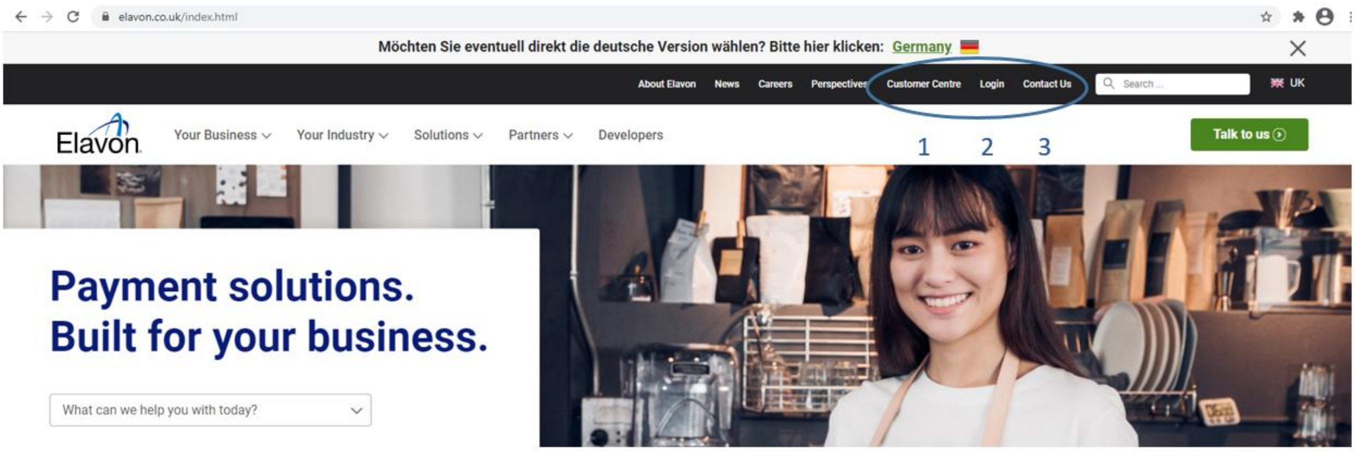
- The system attempts to detect your browser location and determine your location (country).
- After you log in, the language defaults to the country associated with your user ID.
- If you previously selected a country, the system sets the country drop-down to the last country you selected.
- The system shows all text on the login page in the language associated with the country you selected.

Registering for System Access

The self-registration process allows customers that have been boarded and with valid/open merchant IDs to register with Elavon without contacting Support. Registration involves obtaining a user ID and password. The system allows self-registration with a single MID only. Customers with multiple, unchained location can later add more locations to their account. If you have chained locations however, please refer to the note following this section. In case of any issues you can always contact us [3].

After entering Elavon website, please note 3 options put next to each other on the top bar menu:

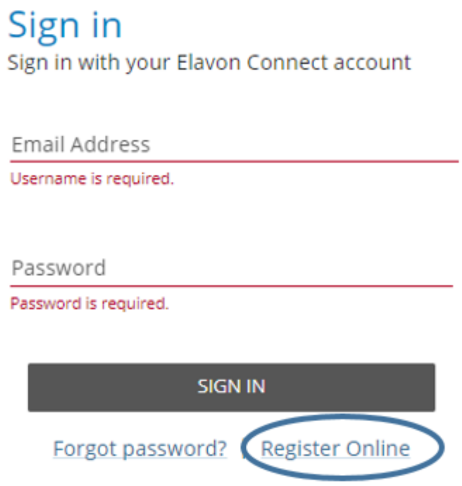
1. Customer Centre – visit the customer centre to see what materials we create for you to make your first steps with card payments easier and to learn more about Elavon Connect.
2. **Login – click <u>login</u> to Register for the first time and to login once you have created your account on Elavon Connect.**
3. Contact us –easy and quick way to contact Elavon.



To register or to log in:

1. Click **login** on the top bar menu

2. Login page displays. Click **Register online** to create a new account.



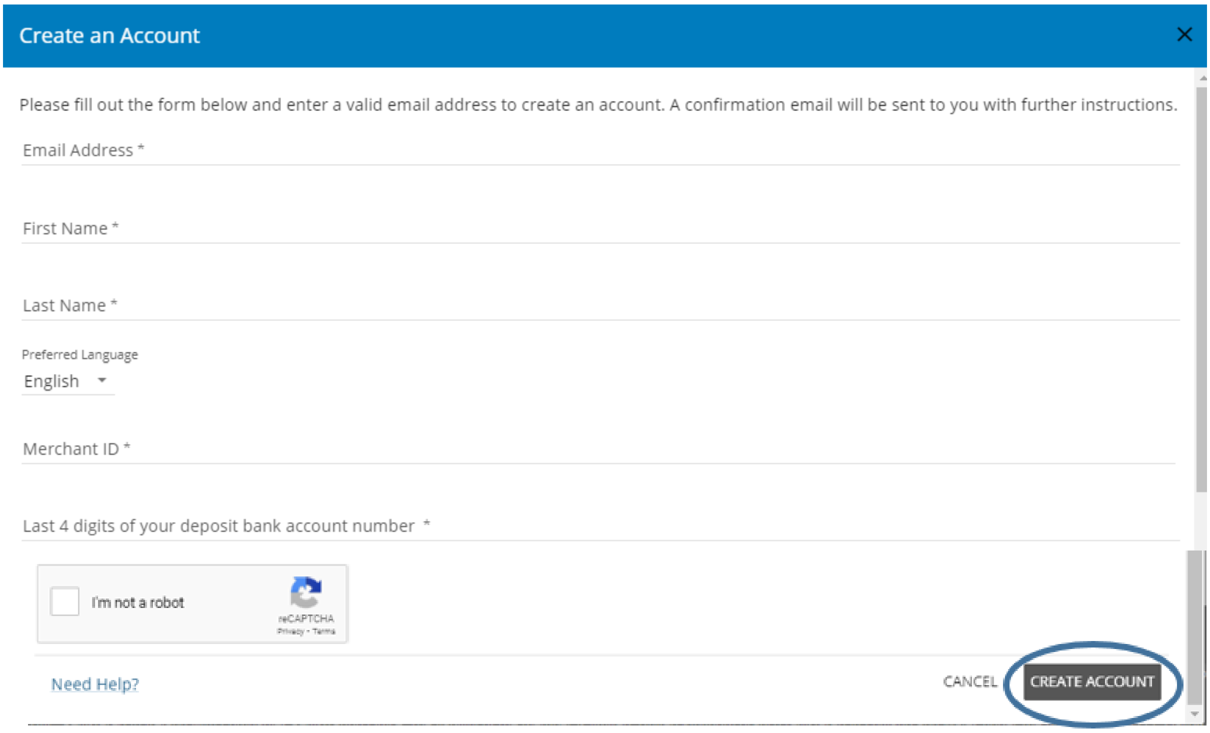
The **Create a New Account** page displays. All fields in the **New Account Information** section are required unless noted. Entry your:

- Email address*
- **First Name**.
- **Last Name**.
- **Merchant IDs**
- the **last 4 four digits** of the **Business Checking Account Number** assigned to the Merchant IDs or Chain Numbers keyed; answer Security Questions if you are asked to do it.

Then Click **Create Account.** You will receive registration confirmation email from **no-reply@elavon.com** address to activate your account.

Note:
Self-registration is only available with a single MID. If you have locations organized by chain, please contact your Relationship Manager or contact our call centre team for further assistance. Support Contact Information displays when you click the **Contact Us** hyperlink located on the pre-login page **https://www.elavonconnect.com**.

*Polish customers must register with an email address provided on application form. If they wish to register with an email that was not provided on application form they need to contact with their relationship manager or our call centre. Customers from other countries can use any email address, it does not have to be the one provided on contract with Elavon.

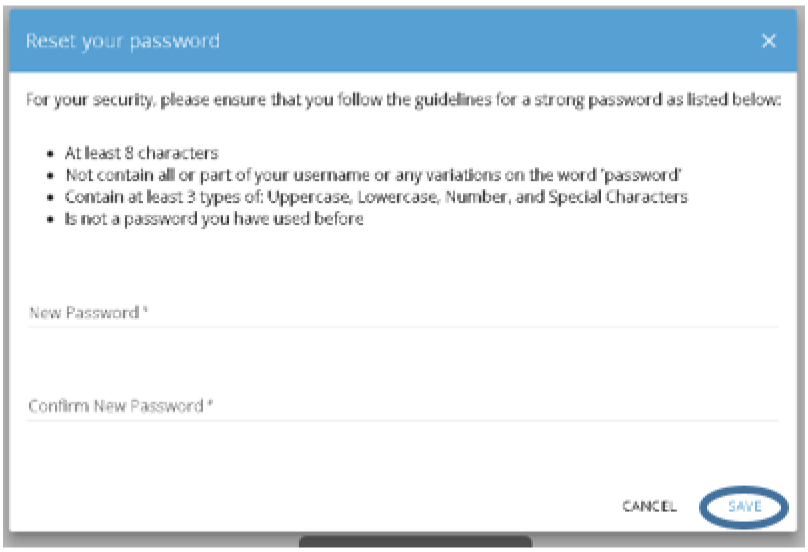


Account Activation

Once you have registered, the application sends an email to your registered account entitled: Your Elavon Connect account has been created. Clicking the link redirects you to the Password Reset Page.

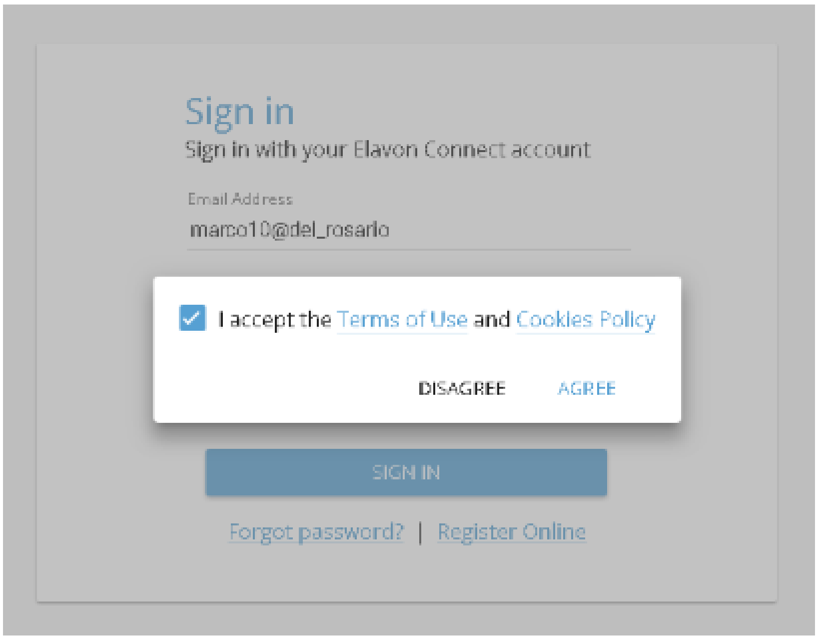
You need to complete the registration process within 24h.

Follow the guidelines and confirm your new password, then press **save**. You should now be able to login successfully.



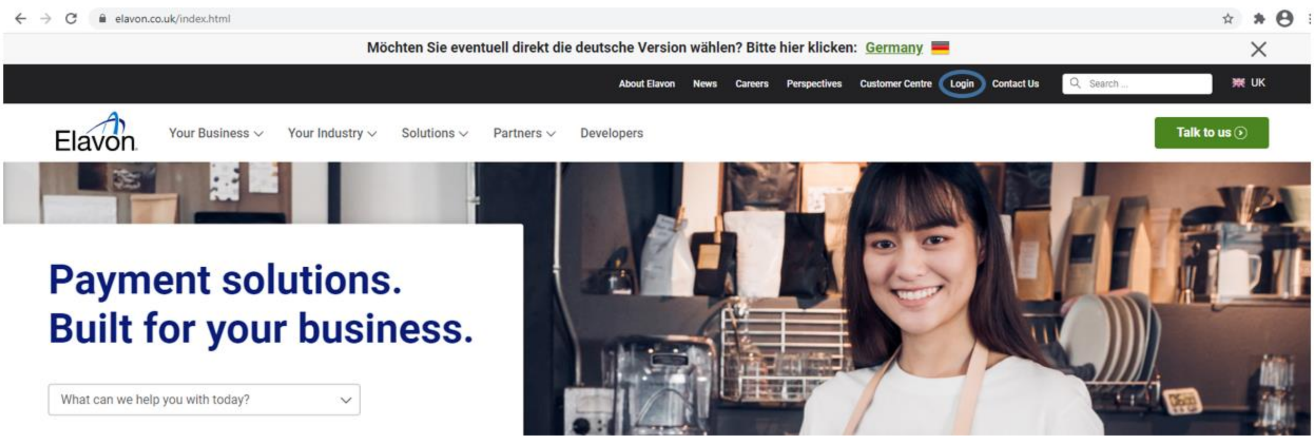
Terms and Conditions

When you log in successfully for the first time (or when the terms of use and cookies policy have been updated), you will see this component below to accept the terms of use. Click on them and read. Click agree if you're satisfied with the terms. You should be redirected to the dashboard page after.

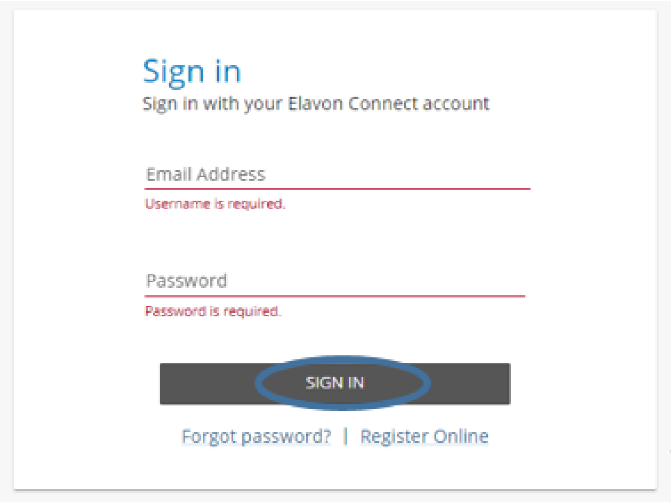


Log in to Elavon Connect

To log in to Elavon Connect you need to enter http://www.elavon.co.uk (or your local equivalent, e.g. Elavon.pl)   website and click **login.**



You will be asked to provide your email address and password. Once you click **sing in** you will be logged in and redirect to your dashboard.



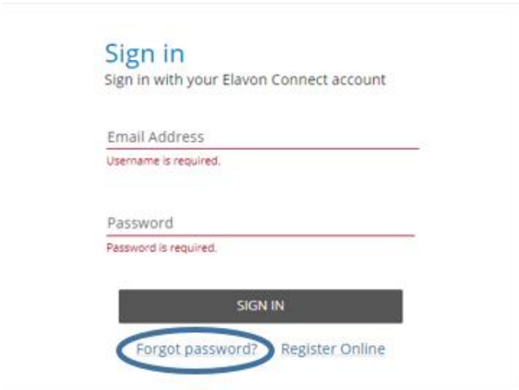
You can also use direct link https://www.elavonconnect.com/ui/#/eu/en_GB/login/register to log in to Elavon Connect.

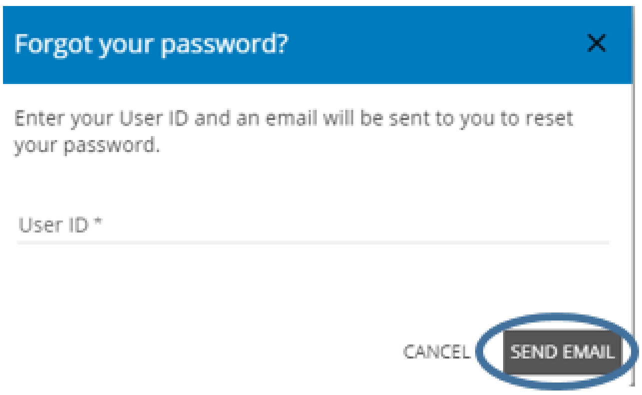
Reset your password

This section provides instructions on how to manage your login credentials if you forgot your password.

On the log in screen click **forgot password?**

You will be re-directed to new screen where you will be asked to provide your user ID (your email address that you are registered with), once you click on send email the application will send you a notification from noreply@elavon.com with the instruction.





Chapter 3: Your Dashboard

What Is a Dashboard?

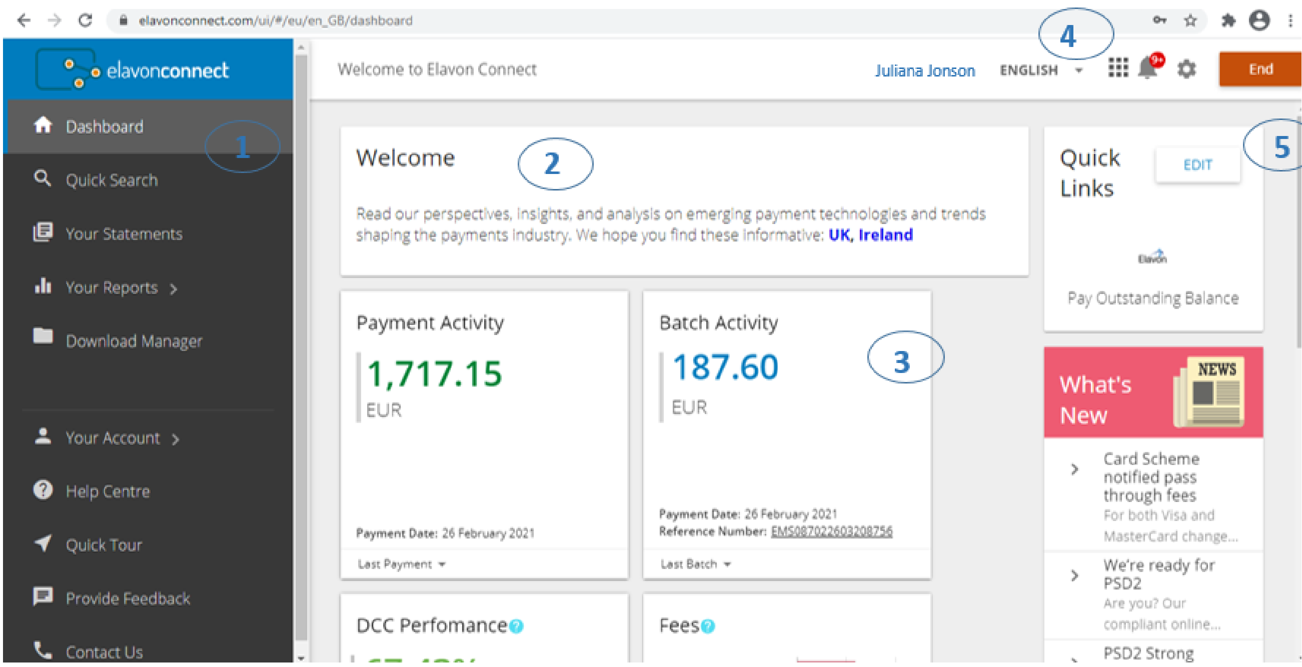
Once you have logged into Elavon Connect, the next page to display is your dashboard. The information you see includes "at a glance" key performance indicators (KPIs) specific to your account. This information refreshes automatically. In addition, you can customize what you see on your dashboard.

Viewing Information on Your Dashboard

Your dashboard includes important "at a glance" information that quickly provides key performance indicators specific to your account.

Your Dashboard Explained

Your dashboard includes a combination of menu options, your business account report information, industry news and updates. The following table provides an explanation of each section.



Section	Typical Elements
1	**Navigation Bar** – A list of features and tasks you can perform in Elavon Connect. Options displayed depend upon your access rights. In this example, the External Customer has access to the following: • Quick Search • Your Statements • Your Reports • Your Account • Help Centre • Quick Tour • Provide Feedback • Contact Us

2	**Headline, Banners and Alerts-** Elavon uses this space for important announcements and reminders if there are any.
3	**Account Data Display (Widgets)**– This section includes at-a-glance widgets that are data indicators specific to your account reports. Click the drop-down (if available) to select additional date parameters. The parameters include Yesterday, Last 7 Days, Last Month.
4	**User Status** – includes User Name, Notification Status
5	This section includes up-to-date information specific to your business and other preferences. They include the following: • **Ads** – Elavon Connect offers available to you to enhance your business experience • **Quick Links** – Shortcuts to your most commonly used websites • **What's New** - Articles with the latest industry news and "how to" tips that address common user experiences and issues

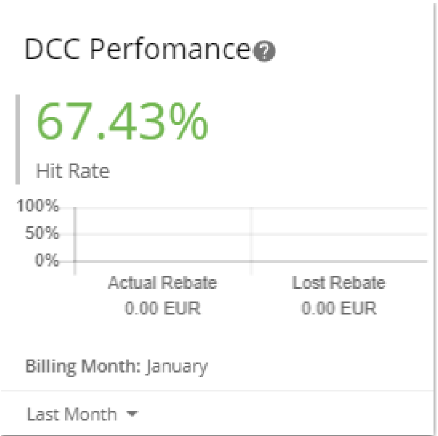
Changing Your Dashboard Information

You can also make changes to some of the information you see on your **Dashboard**.
Some sections that display on your dashboard are "view only" and you cannot change the information. However, you can change displays in the following sections:

- Widgets
- Quick links

Changing Your Widget

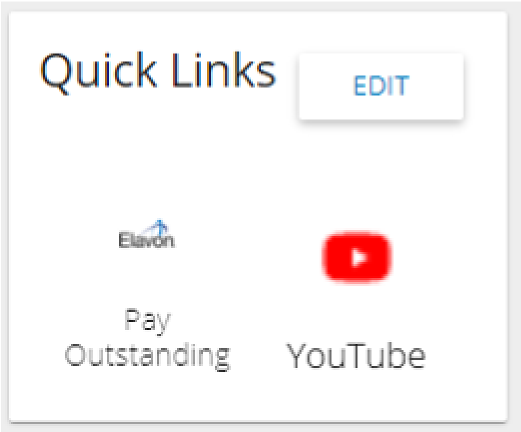
Most of the widgets on your Dashboard include an option for you to view data for different date ranges. The range typically includes Yesterday, Last 7 Days, Last Month, and. Different widgets might have also other options.



If the date range is customizable, a drop-down arrow displays at the bottom of the widget. Simply click the drop down arrow and select a different date range. The widget will refresh and display with the updated data.

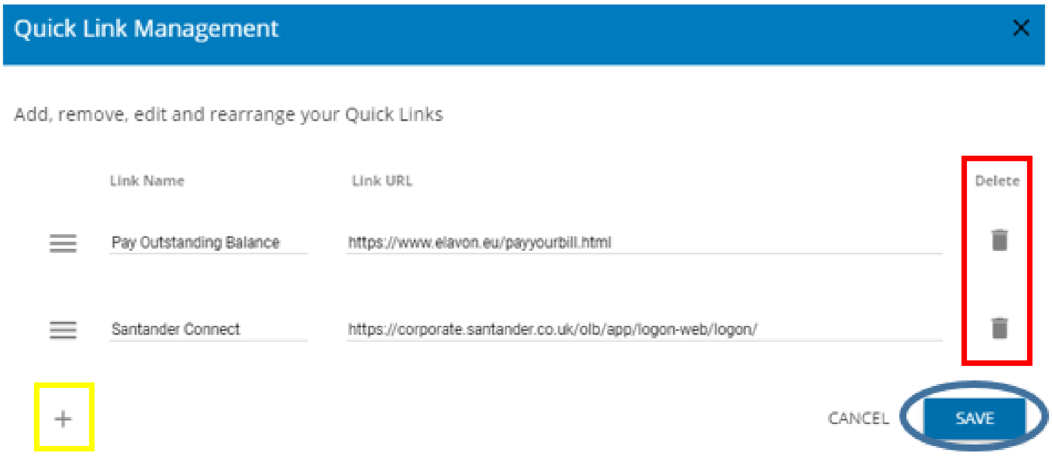
Changing Quick Link Details

Quick Links is a section that includes shortcuts to external web sites. You can add, remove, rearrange or edit the Quick Links in this section.



To add a Quick Link:

1. From the Quick Links section on your Dashboard, click **Edit**. The **Quick Link Management** page displays



2. Click the plus icon at the bottom of the page. A new row displays.
3. Type the **Link Name** and the **Link URL**.
4. Click **Save**.

Other Quick Link options

- To rearrange the order in which the Quick Link shortcuts display, click to drag the row to the position in which you want it to display. **Example:** dragging a Quick Link from the bottom of the row to the top of the row will allow that Quick Link to display at the top of the Quick Links section on your Dashboard.
- To remove a Quick Link from the list, click the garbage can icon next to the link.
- If you need change the Link Name or Link URL, simply type over the existing text and click **Save**.

Chapter 4: Working with Accounts

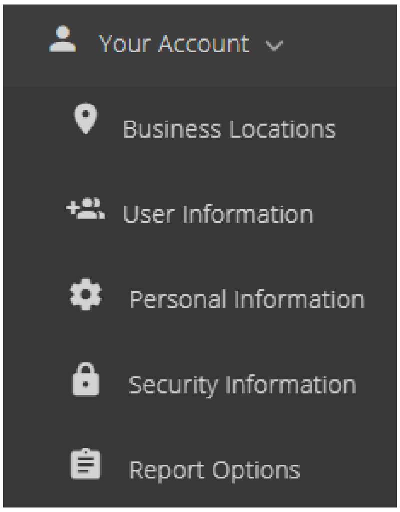
Note: This section is for Customer Managers only.

Once you have set up your user profile, you now have access to the following information:

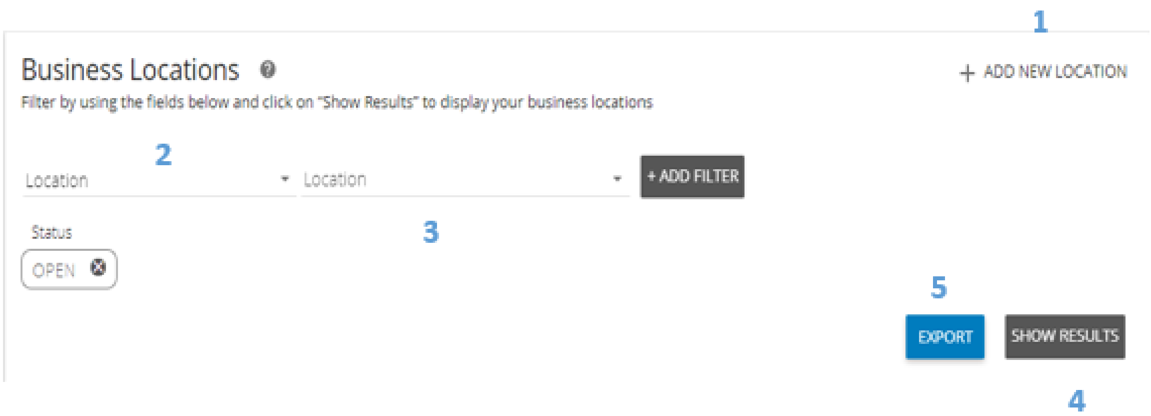
- Business Locations
- User Information
- Personal Information
- Security Information
- Report Options

To access your **Account** information, do the following: From your dashboard, select **Account**. The following options display:

Working with Business Locations



When you log into Elavon Connect, you can make changes to Business Information. In the Location header, the system displays options depending on whether you are a customer with a single location or with multiple locations.
Do the following to access and manage Business Location information:
From your Dashboard Navigation section, select **Your Accounts → Business Locations**. The **Business Locations** page displays.

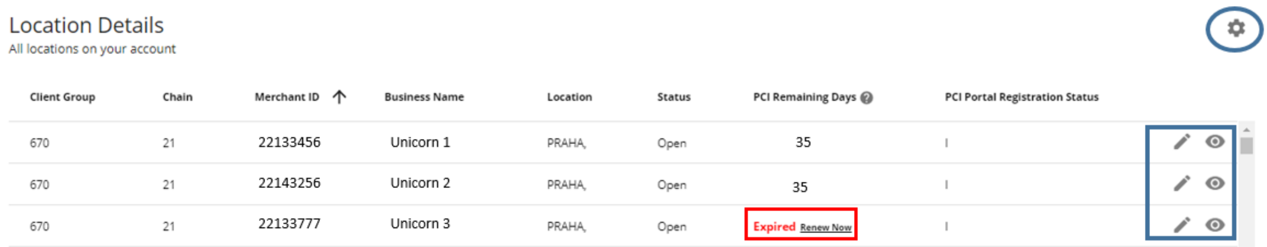


Option	Description
1	Add new location- if you have more locations you want to manage, with MID number and 4 last digits of bank account you can add it to your locations list
2	Select an attribute you want to search your locations with. You can chose **location** or **status**
3	If your filter is **location** choose from list of your MIDs, Chains and **location groups** (if you have any). If your filter is **status** choose from the dropdown list **open** or **closed**.
4	Once you select information you are looking for you application will **show the results**
5	You can **export** your search results to excel

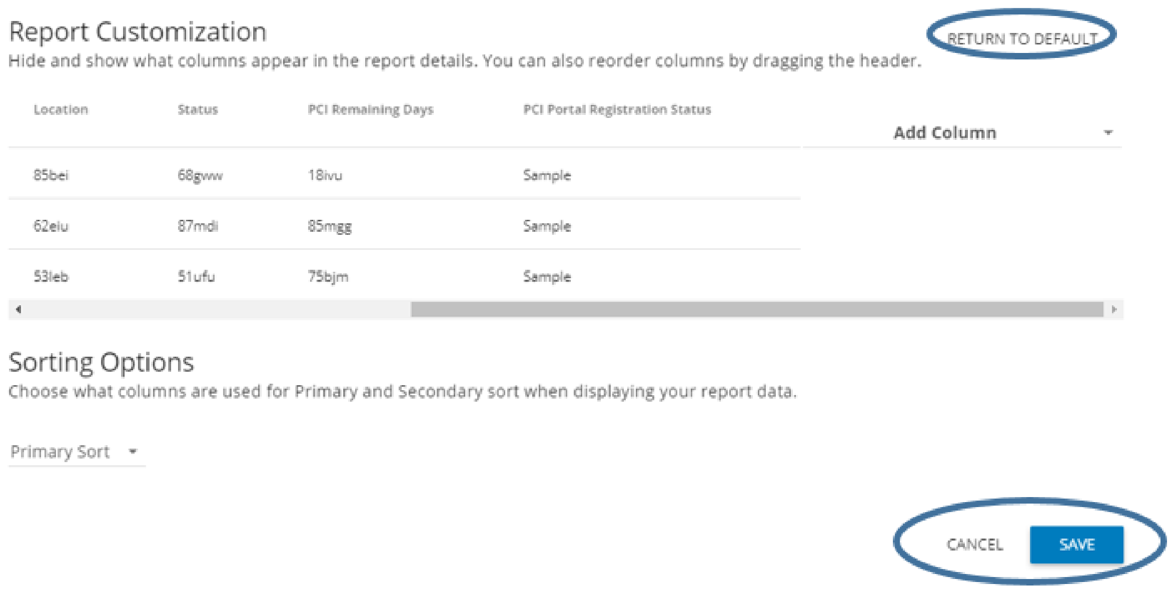
Viewing your Location details

On the Business location page, under the search section, all your locations are displayed with some basic information. You can customize what information should be displayed and in which order.

On the screen with default settings, you will see the below, where Merchant ID, Business name, location, status and PCI remaining Days are most useful for customers. You can view and edit each location's details by clicking the pencil or the eye sign. More details in *View business location details* and *Request changes to your location.* If you would like to customize it, click the option sign in the right hang corner.

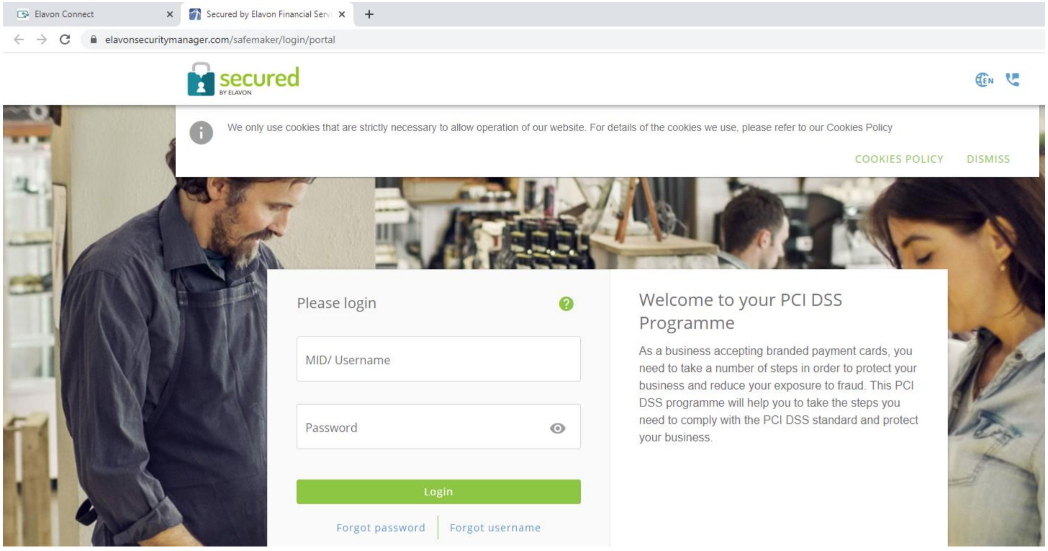


Here you can grab and move selected attribute to the left or to the right, remove it from the list or add new one. You can always **return to default** or **cancel** your changes. If you satisfied with changes you have made, click **save**.



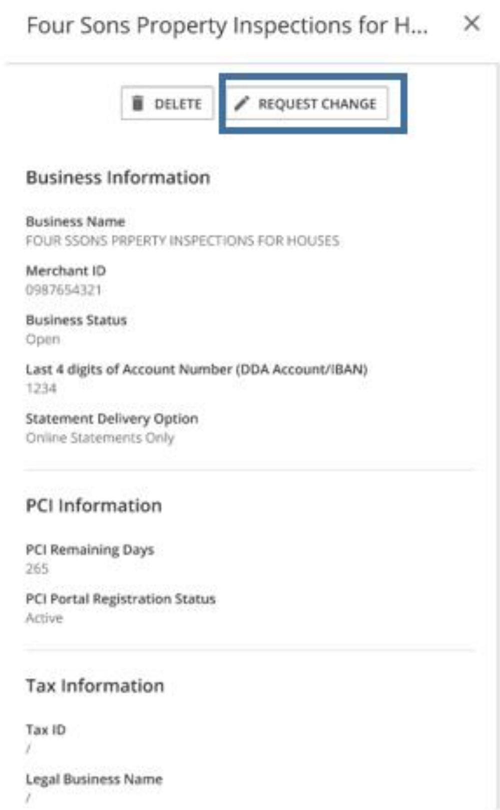
Payment Card Industry (PCI) Data Security Standards (DSS)

On the Business location page, you can see how many days your **PCI** will be still valid for and if it is already expired, you can click on **Renew now** which will open a new window. Elavon Security manager website will open where you would need to log in and follow the steps provided on this site.



View business location details

To view more detailed information about specific location, you need to select the location on the location list or click the eye icon on the far right side in your selected location line. New pop-out window, on the right hand side, will appear.



Request changes to your locations

You can use Elavon Connect to request particular changes to your business locations details.

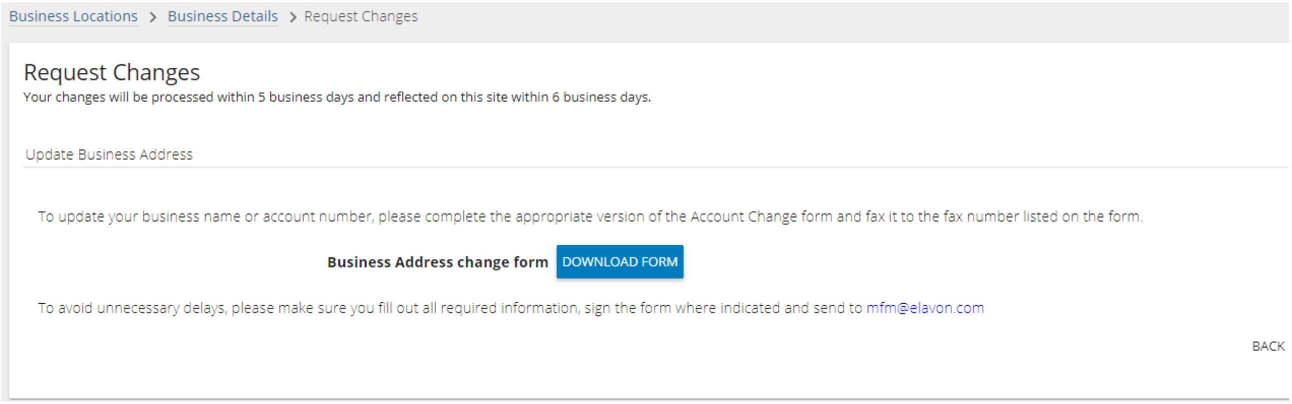
1. On the **Business Locations** page, find the **Locations** you want request changes for and click the pencil icon on the far right icon on the far right side in your selected location line.
2. Request Change page will display. Click on **Select a topic** to choose what change you would like to request.

You can also access the request change site from viewing your location details. Click on the **request change** on the top of location details side.

You can select the following from the list:

- Update Business Address
- Update Business Name (DBA)
- Update Bank Account Details (DDA)

3. Once you select a topic, list of required documents in PDF format will appear. Download them, fill up with required information and email them back to Elavon at mfm@elavon.com.

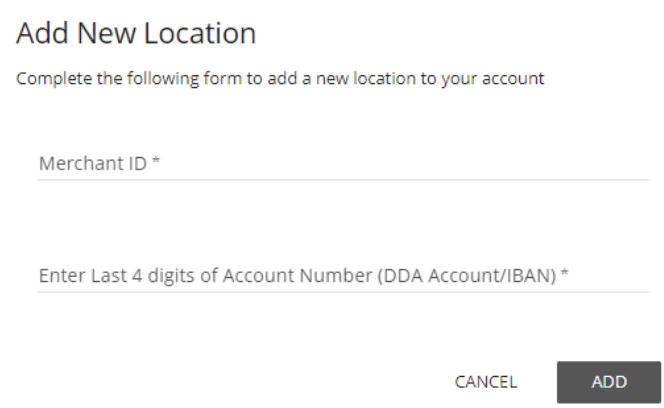


Adding a New Location

If you have multiple business locations, Elavon Connect allows you add all your locations to your profile so that you can access all your information through a single Elavon Connect account. All you need in order to add a location to your Elavon Connect profile is the MID number and the last four digits of the DDA/Account Number associated with that MID.
Do the following to add a new location:

1. Click the **Add New Location** in top right corner of your **Business Location** page

2. The **Add New Location** pop-up window displays. Enter the **Merchant Identification (MID)** and the **last for digits** of the bank account associated with the location.



Once the system validates your location information, it will show up in all your reports and statements automatically.

Note 1: Both fields are required. In order to add the bank account information (last 4 four digits), you must have the MID and full bank account information added during your initial account setup. If the information is not in the system, you will not be able to add the Location.

Once the system validates your location information, it will show up in all your reports and statements automatically.

Note 2: If your location is part of a Chain and you receive a Chain Summary Statement for your business, you should not add your location using the above steps. Please contact your assigned representative to get your locations added to Elavon Connect. If your location is part of a chain and you add them yourself using the above steps, you will not be able to access your Chain Summary Statement and will not automatically see new locations added to that chain.

Deleting a Location

1. Select the Location you want to change. The **Location Details** pop-up window displays.

2. Click the **Delete** icon at the top of the pop-up window to remove the location. A confirmation message displays.

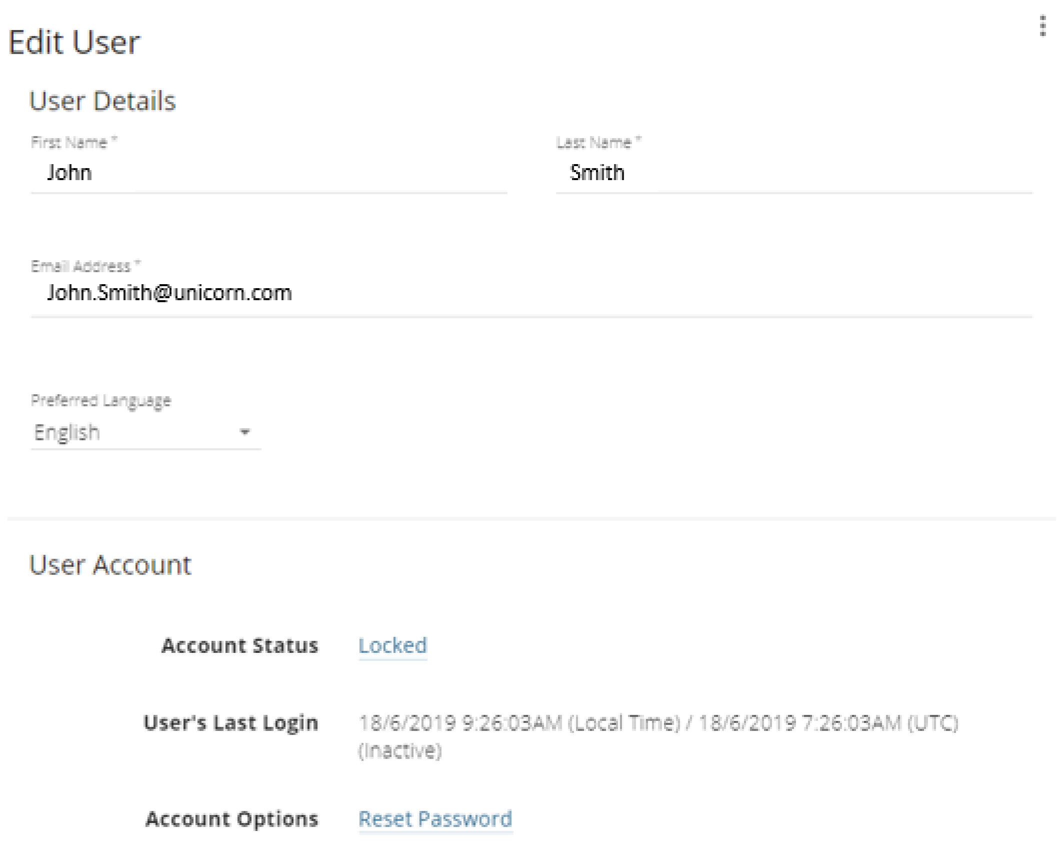
- Click **Yes** to remove the Location and return to the list of locations displayed from your filter selections.
- Click **No** if you do not want to remove the location. You can click the Back link to return to the list of locations displayed from your filter selections.

Working with User Information

The User option helps you manage user information and permissions for your business.

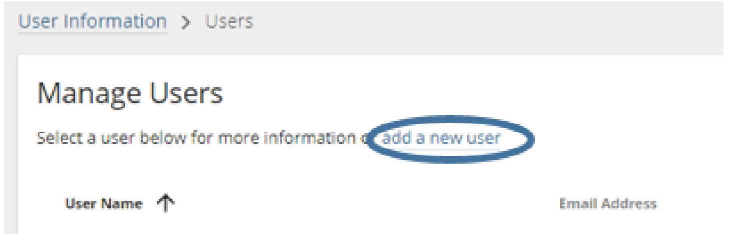
User Information is located under **Your Account** on the left hand side menu.

Here you can view your users, edit their data, reset password, remove or add more users.



Adding a New User

After your Elavon Connect account has been set up, you can add more users who need to access your business and account information (i.e., partners, tax consultants, or financial advisers). You can also assign permissions to your users, including specific locations and specific activities as appropriate. Do the following to add a user to your Elavon Connect account:



1. Click **Your Account** in the Dashboard Navigation section.
2. Click User Information| Users.
3. Click **Add a new user** at the top of the page.

4. Enter the First Name, Last Name, and Email. The **User Permissions** section is enabled. Click on it.
5. **Assign Locations**. Choose which locations user should have access to.
7. In the **Assign Role(s)** section, select the **Employee** or **Manager** tab.

Note: Permissions for each role have been pre-defined and cannot be changed.

8. Click **Assign**. The **Add New User** page displays, with details you selected. You have the option to **Edit** information in the Assigned Roles and Location sections. See Editing User Details.
9. Click **ADD**. The new user displays on your list of Users. You will also receive an email, confirming the Add New User action.
10. You can assign the user access to some or all locations, as well as designate them as Employees or Managers.

Deleting a User

Do the following to remove a user from your Elavon Connect account:

1. Click **Account** in the Dashboard Navigation section.
2. Click **User Information| Users**. The number of users assigned to your business displays.
3. Click the arrow to expand the user list. The **Manage Users** page displays.
4. Select the user you want to remove from your business profile.
5. Click the three vertical dots in the top right corner, then **delete user**. A confirmation message displays.
6. Click **DELETE**. Elavon Connect sends a confirmation message to the email provided in the Business profile.

Editing User Details

You can edit existing user information to make changes to locations, permissions, and profile information.

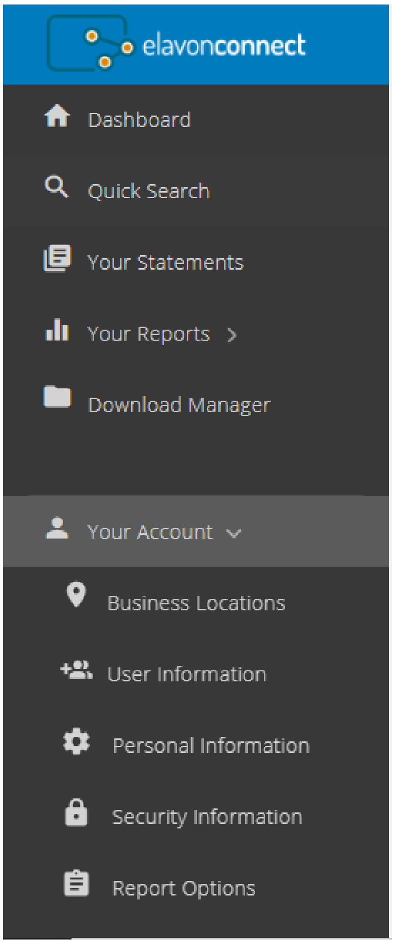
Note: You can only edit a user that has the same or a subset of your hierarchy. You cannot edit a user whose location access is greater than your own.

Do the following to remove a user from your Elavon Connect account:

1. Click **Account** in the Dashboard Navigation section.
2. Click **User Information| Users**. The number of users assigned to your business displays.

3. Click the arrow to expand the user list. The **Manage Users** page displays.
4. Select the user you want to edit profile for. The Edit User page displays. You can make changes to the User Account, User Details, and User Permissions.
4. User Account – Change your user name, user email, Country, and Language.
5. User Details – Reset your user's password.
6. User Permissions – Change your user's **Assigned Role** and **Assigned Location(s).**
7. Click **UPDATE** to make changes to the user's profile. Elavon Connect sends a confirmation message confirming to the email provided in the Business profile.

Working with Personal Information

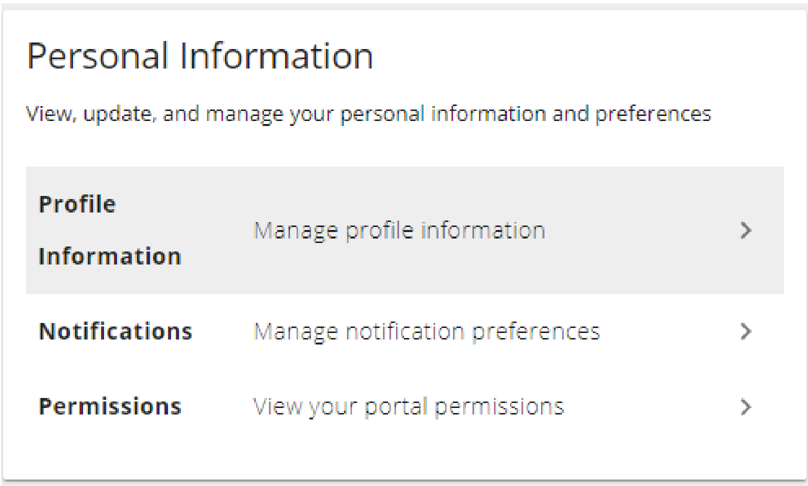


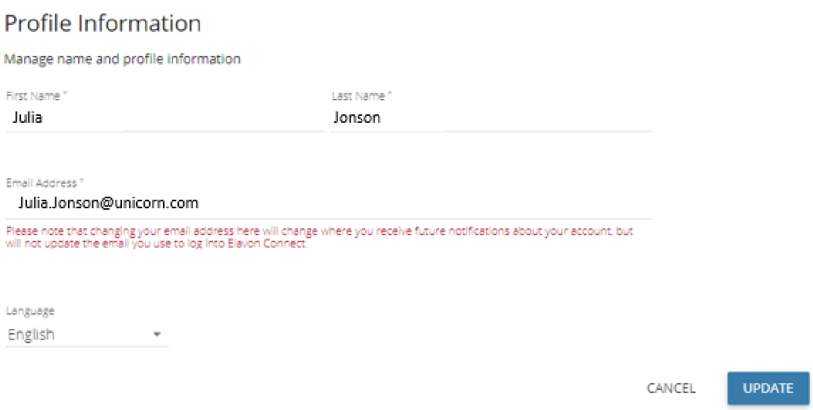
You can use the options here to make updates to your Profile Information, Notifications, and Permissions.

From your Dashboard, select **Your Account** from the left Navigation section. The Account options list expands.

Updating Personal Information
Use this section to change your Name, Email, and Phone number.
To update your Personal profile:

1. From the Left Navigation section, select **Personal Information**. The **Personal Information** page displays.





2. Select **Profile Information**. The Profile Information page displays.

3. Make your changes and click **Update**.

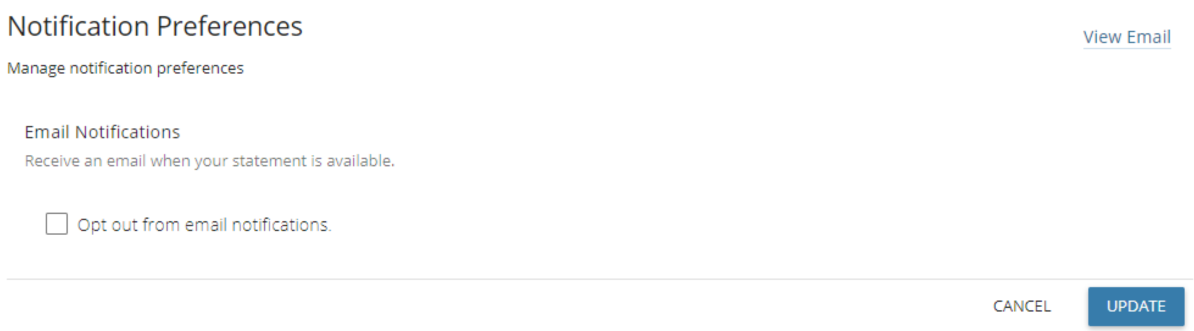
Note: Any email change entered here will only affect alerts concerning your account. You will still use the email address in your User Profile for logging into Elavon Connect.

Updating Notifications

Use this section to opt-in or opt-out for receiving email notification.

To update your Notifications:
1. From the Left Navigation section, select **Personal**. The **Personal Information** page displays.

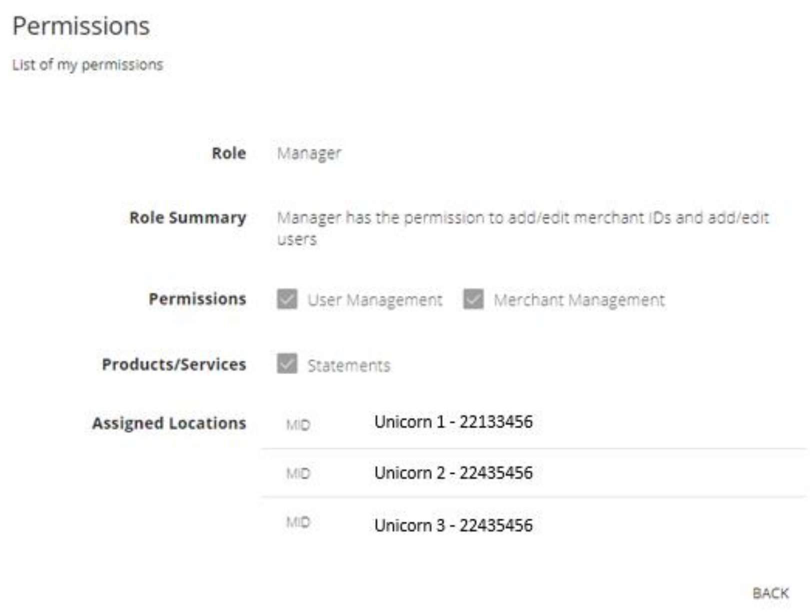
2. Select **Notifications**. The Notification Preferences page displays.



3. Update your preferences.
4. Click **view email** to change the email the notification should be send to.
5. click **update**.

Working with Permissions

This section includes Role, Role Summary, Permissions, Products/Services, and Assigned Locations. This is a view only page. Refer to *Working with User Details* to make Role, Permission(s), and Assigned Location(s) changes for additional details.



Click the **Back** link to return to the **Personal Information** page.

Working with Account Security

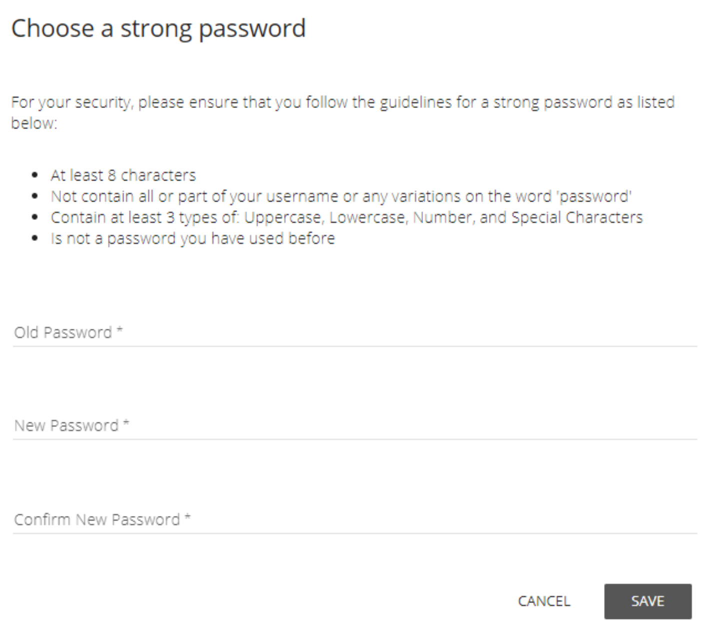
Use this option to change your password. Changing your password often ensures additional security measures against unauthorized access to your Elavon Connect account.

1. From your Dashboard Navigation section, select **Your Account → Security Information**. The **Change Password** page displays.

2. Click **Password**.

3. Enter your Old Password, New Password, and Confirm New Password. New password guidelines appear at the top of the page.

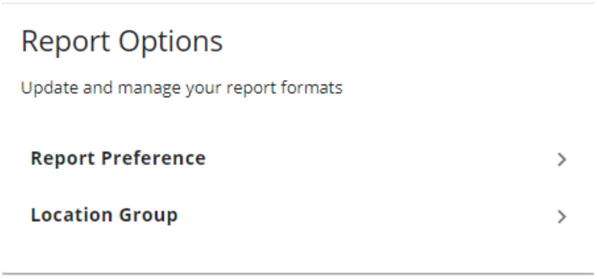
4. You will receive an email confirmation.



Working with Report Options

Use this option to update and manage your report formats. Two options are available:

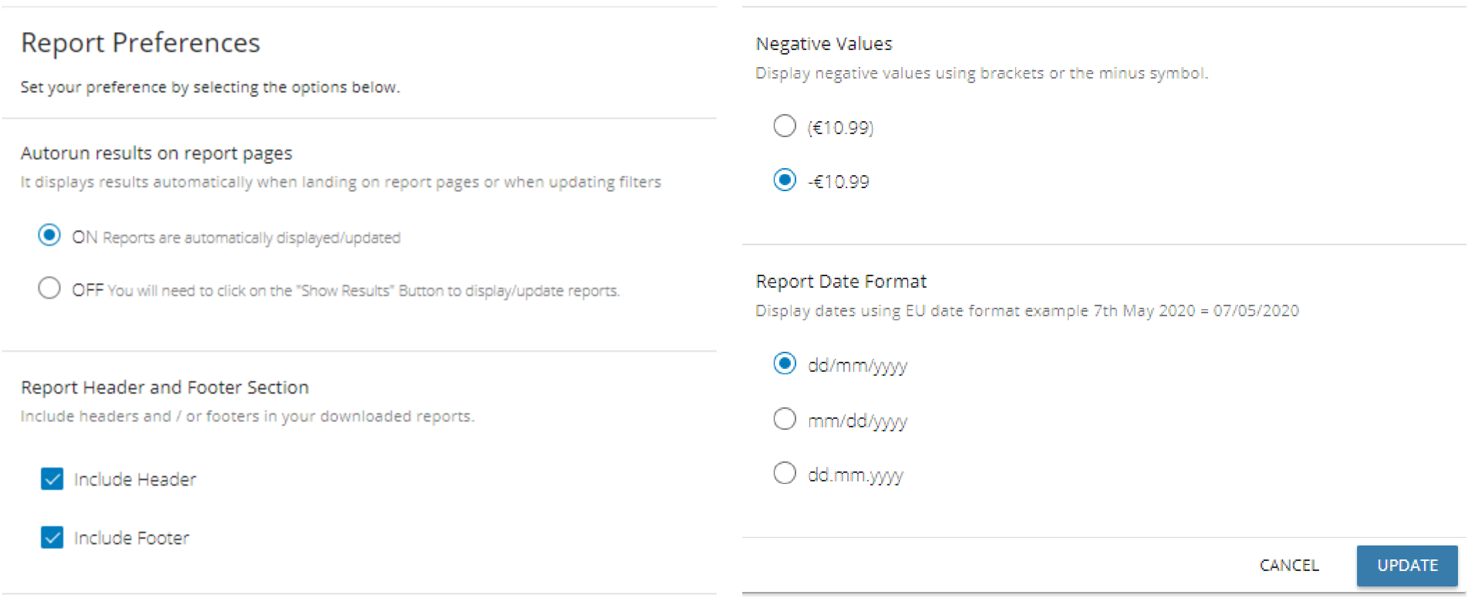
- Report Preference
- Location Group



Report Preference

1. From your Dashboard Navigation section, select **Your Account → Report Options.**

2. Click **Report Preference**. The Report Preferences page displays.

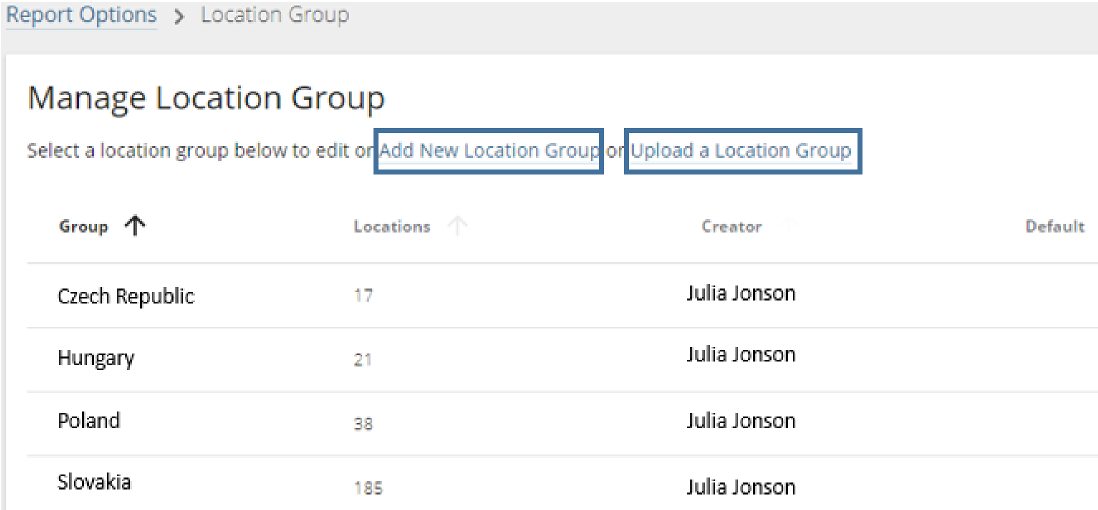


3. You can change the following: auto-run results, Header/Footer display, negative value display, and Report Date format.

4. Click **UPDATE** to save your changes. Elavon Connect sends a confirmation message to the email provided in the Business profile.

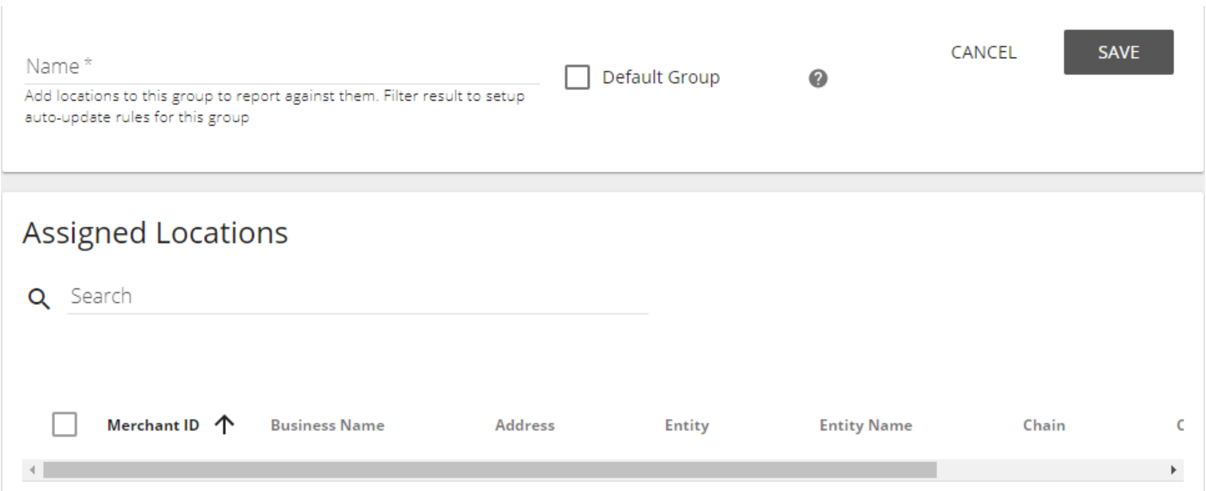
Location Group

Location group is dedicated for users with large number of MIDs assigned to them. In Location Group you can group them even if they are not chained. You can then filter your reports by Location Group instead of selecting multiple single MIDs to see report for that specific group. It gives you an easy access to collective information regarding connect MIDs e.g. by location. You can create new location group by Add new location group or you can upload the data in excel or csv format.



Use this option to add Locations to a Location Group.

1. 1. From your Dashboard Navigation section, select **Your Account → Report Options → Location Group**. The **Location Group** page displays, along with a list of existing Location Groups.
2. Click **Add new location group.** Create a name for your location group, you can make it default group (it will appear in the dashboard reporting as well as the initial report group for all reports).
3. Find and add all location you want to include in this group. Then click **save**.



To edit a Location Group, do the following:

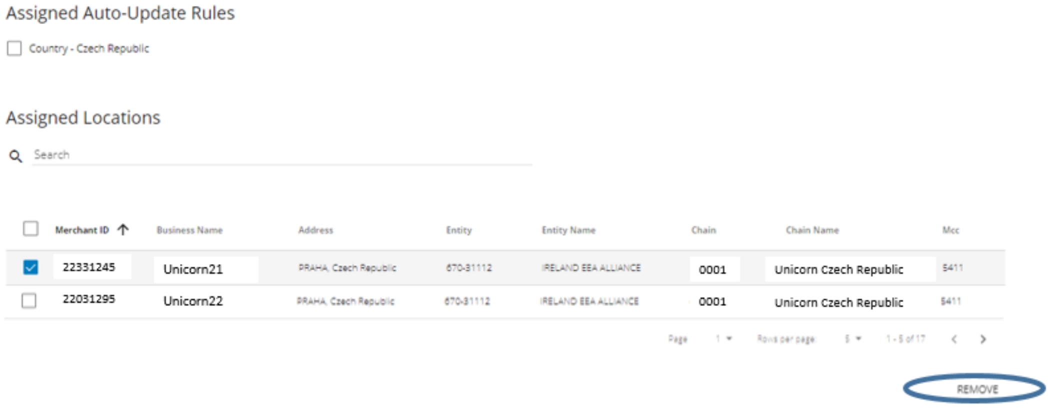
1. From your Dashboard Navigation section, select **Your Account → Report Options → Location Group**. The **Location Group** page displays, along with a list of existing Location Groups.

2. From the **Location Group** page, select the **Location Group** you want to update. New page displays.

Assigned Locations – remove location

This is a list of locations currently assigned to the Location Group. Auto-assigning occurs when a user adds a chain to a location group. Chains can have new MIDs added to them. Those new MIDs are automatically added to a user with chain-level access in the User profile. This auto-adds those new MIDs to the location groups too.

To remove a Location from the list, check the box next to the Location and click **Remove**.

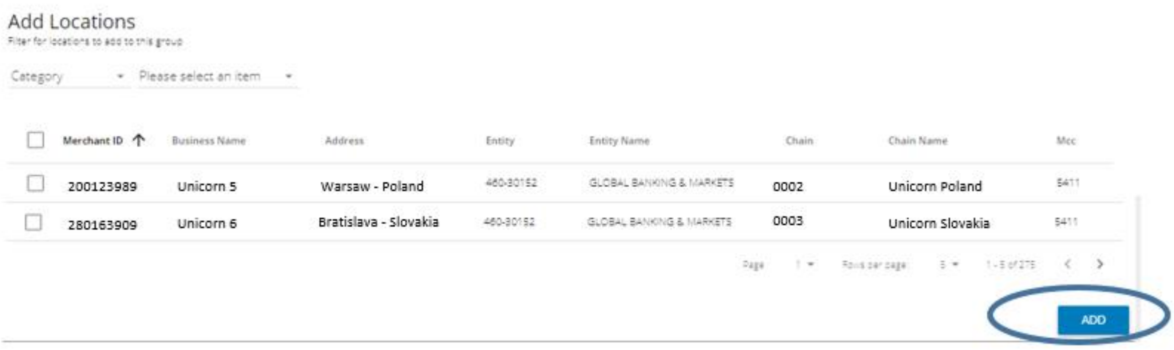


Add Locations

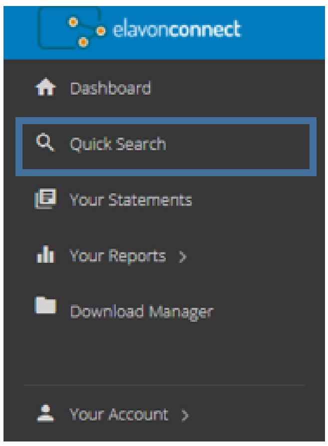
Use this option to add Locations to an existing Location Group.

1. From the **Location Group** page, use the filter at the top to search for a specific location. You can also check the Locations displayed.

2. Click **ADD**. The Location is now included in the Location Group. Elavon Connect sends a confirmation message to the email provided in the Business profile.



Chapter 5: Quick Search

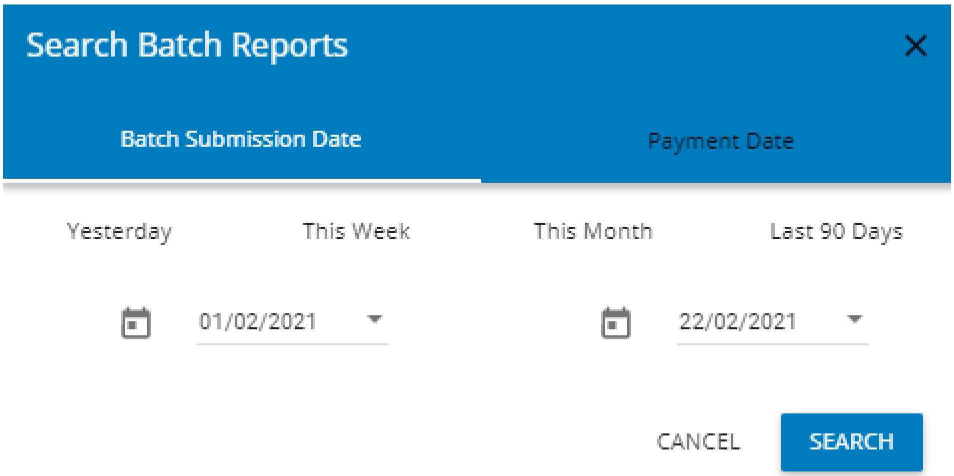


Elavon Connect gives you the option to search for your submitted and funded batches directly from main menu instead of going to reports section.

Do the following to access the Batch Search option:

From the Dashboard Navigation, select **Quick Search**. The **Transaction Search** page displays.

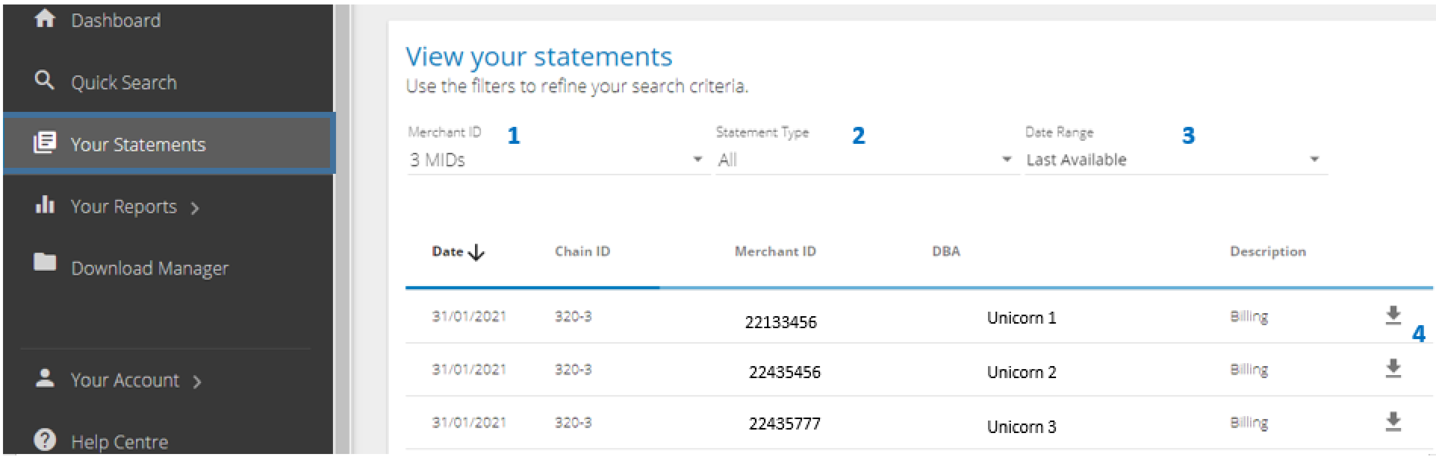
1. Select **Batch Submission** date or **Payment Date**
2. Select date range. You can manually select dates range on calendar option or you can choose one of the pre- selected options: yesterday, this week, this month or last 90 days.
3. Click **search.**
4. If you selected **Batch submission date** – Batches Submitted Report displays. If you selected **Payment Date**- Batches Funded List Report displays.



Chapter 6: Statements

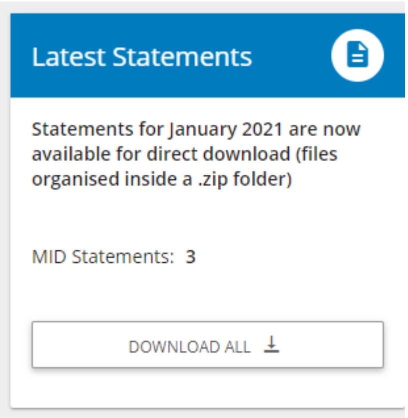
Elavon Connect gives you the option to download your statements from the most recent up to the previous 12 months.

1. Click the **Your Statements** link in the left navigation bar to access your online statement.
2. The **Statements** page displays with filters to view statements based on MIDs or Chains. You can select other filters, including the location, statement types, and the most recent statement up to a custom date range.
3. Once you have selected your filters, the list of statements available will display in the list.



number	Option	description
1	MIDs ID	Select location(s) to view statements. You can select one, multiple or all.
2	Statement Type	Select Statement type. You can choose **Billing**, **Funding** or **All**.
3	Date Range	Select Date Range for your statements. You can choose **Last Available**, **Last 3 Months** or **Custom Date Range**. For the last option a calendar will pop-out so you can select the dates from and to.
4	Download	Click here to download your statement to PDF.

You can also download your statements directly from the dashboard using **Latest Statement** widget.



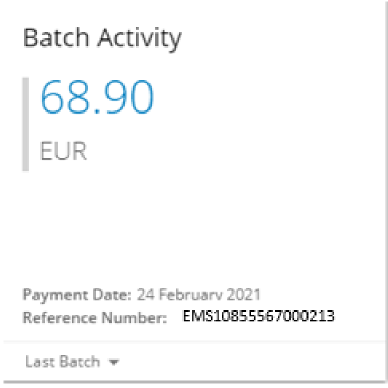
Common Fees Associated with Your Statement

The following are fees that are typically included in your Statement:

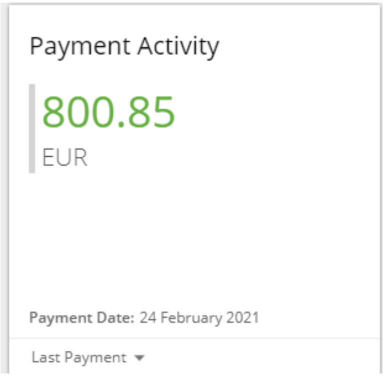
Fee	Description
Terminal Rental	Fees paid for the rental of the terminal.
Card Fees	Fees for the processing of card transactions. They vary by card type.
PCI	Fees paid for Non-compliance and for the PCI program.
Authorisation Fees	Fees paid for every authorization attempt.
Minimum Monthly Service Charge MMSC	Minimum amount of Card Fees chargeable monthly.

Fees and their amounts will very depend on your contract.

Viewing Batch Activity



Your batch activity displays in the **Batch Activity** widget on your Dashboard. You can also review this activity in the **Payment List** report (see *Payment List Report*). This widget displays your settled batch amounts for the time period you select. You can choose between viewing **last batch** amount or **previous batches** which will show you six last batches. If you have more than one location, the widget shows your batch activity for all your locations.



Viewing Bank Activity at a Glance

Your bank activity displays in the **Payment Activity** widget on the Dashboard. You can also view this information in the **Payment List** report (see *Payment List Report* for more details). This widget displays your deposits, fees, and any adjustments or chargebacks for the time period selected. The default time period for the widget is the **last payment**, but you can easily go back to the previous day by selecting **Previous Payment** or day before by selecting **Earlier Payment**.

Chapter 7: Reports

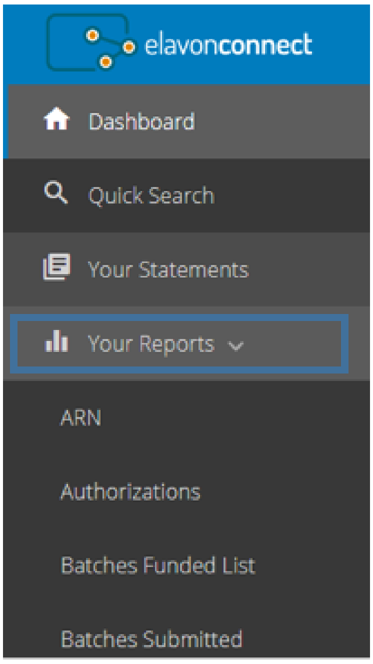
Overview

The Elavon Connect reports can assist you in measuring Key Performance Indicators for your business. These KPIs help you monitor your performance in daily, weekly, monthly, and custom date intervals. This Reports section describes the sections of a report, how to filter a report (including filter options), and a sample preview of a generated report.

Accessing Your Reports

You can access specific reports from your Dashboard. The report data comes from transactions the customer has processed within the last 2 years.

Do the following to access your reports:



1. From your dashboard, select **Your Reports** from the left Navigation panel.

Your user profile and access rights determine the reports that will display.

2. Select a report.

Depends on your account and type of business different reports are available to you. There are 10 standard reports available to every customer the rest is assigned based on business type or additional products. There is also a number of reports which can be assigned upon customer request.

Search options work the same way for all reports, only the filter options differ.

Below you can see description and example how to work with reports based on few common reports. Full list of reports with short description is added at the end of this chapter.

Payment List

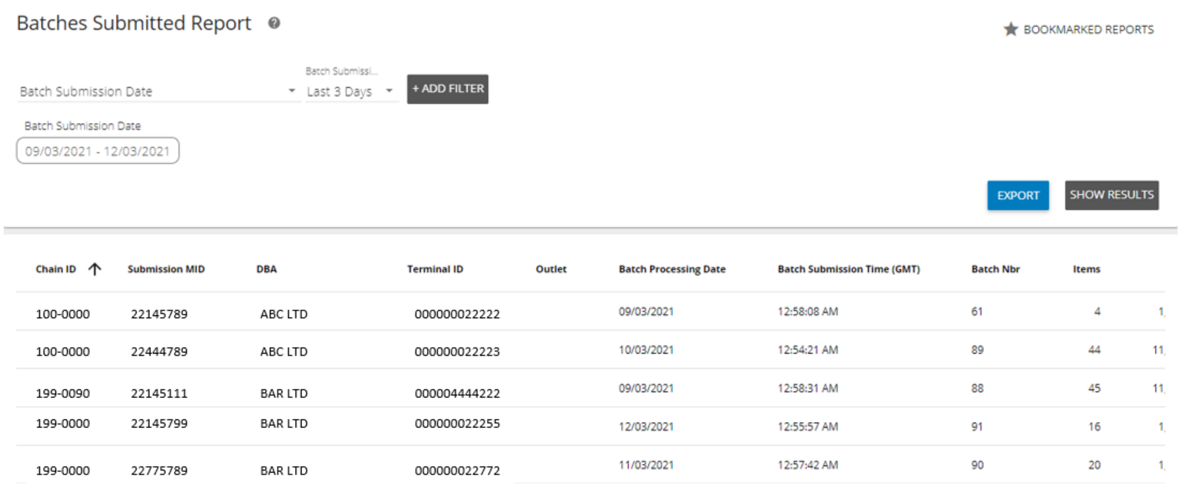
Payments List displays the total amount paid. The user can also drill down into 'Payments Details' report for a breakdown of the final amount paid after all fees are deducted. CSV and Excel reports will provide a list of all transaction items that made up that total payment amount. You can check the Batch for given payment directly from this report.

Number	Description
1	Choose from drop down list the attribute you want to search by. You can select from: • Location • Payment date • Payment Amount • Payment Reference number • Chain ID • MID • Currency Depends on the attribute you select you will be able to enter the data manually (for example in case of Payment Reference number) or chose from drop down list (for example in case of Location)
2	Chose the data you want to search by, depends on selected filter, different options will be available to you. • Location – Your location groups and single locations • Payment date – last 24h, yesterday, last 7 days, last 30 days, custom date range • Payment Amount – enter manually minimum and maximum payment amount • Payment Reference number – enter manually payment reference number • Chain ID – enter manually chain ID • MID – enter manually MID number • Currency – select currency from drop down list
3	Under the search options, once you click **add filter** or click enter on your keyboard, your selected filters will be displayed.
4	You can **bookmark** the report to save selected filters and **schedule** the report to be delivered to you at a frequency of your choosing. You will be alerted though email and the alert bell when it will be ready to download. The file will be available for download for 24h.
5	You can export your report. You have two options available: • Quick export – report will be exported to excel file • Advanced export – new pop-up window will appear where you can select the language of the report, format (excel, CSV, TXT) and the name.
6	Once you select all needed filter, click show result to view the data below the search engine.

Batches Submitted

Batches Submitted display batches submitted for processing. This report can be used to reconcile against the Batch/End of Day from customers' card terminal. There is separate report Batches Funded List which displays batch that have been paid.

Example of Batch Submitted report:



Chain ID	Submission MID	DBA	Terminal ID	Outlet	Batch Processing Date	Batch Submission Time (GMT)	Batch Nbr	Items	
100-0000	22145789	ABC LTD	000000022222		09/03/2021	12:58:08 AM	61	4	1,
100-0000	22444789	ABC LTD	000000022223		10/03/2021	12:54:21 AM	89	44	11,
199-0090	22145111	BAR LTD	000004444222		09/03/2021	12:58:31 AM	88	45	11,
199-0000	22145799	BAR LTD	000000022255		12/03/2021	12:55:57 AM	91	16	1,
199-0000	22775789	BAR LTD	000000022772		11/03/2021	12:57:42 AM	90	20	1,

Transactions Submitted

Transactions Submitted report displays a list of paid and unpaid transactions within a batch. This report can be used to reconcile against your Batch/End of Day from your card terminal. There is separate report Transactions Funded list which displays transactions from within specific batch that has been paid.

Transactions Submitted List Headers	Descriptions
CHAIN ID	The unique client identification number provided to the client by Elavon to allow corporations to tie groups of merchant IDs together. If the MID is not associated with a Chain ID, then the column will be blank.
SUBMISSION MID	The unique identification number, provided to the client by Elavon, where the transaction took place.
DBA	The "Doing Business As" name associated with the MID.
OUTLET	The store number or code assigned by the customer where the transaction occurred.
SUBMISSION DATE	The date the customer submitted the batch of transactions to Elavon.
TERMINAL ID	The unique number used to identify the terminal where the transaction originally occurred.
BATCH NBR	The unique reference number assigned by Elavon to the batch in which the transaction is included.
ITEM NBR	The unique number assigned to the transaction within its associated batch.
CARD NUMBER	The unique number assigned to the credit/debit card that identifies the cardholder's account number that incurred the transaction.
CARD TYPE	**CARD TYPE**—The settlement product type. Displays the abbreviation for the card type (such as MC for MasterCard or VI for Visa).
AUTH CODE	The authorization code that was provided to the customer by the issuing financial institution for the original transaction.
AUTH SRC CODE	Indicates where the authorization was obtained (such as, Issuer or Stand In Processing (STIP)).
POS ENTRY MODE	The method used to authorize the original transaction (such as, Key Entered, Chip Card Read, or Mag Stripe Was Read).
TRANSACTION TYPE	The type of transaction that took place (sale or refund).

DCC IND	The Dynamic Currency Conversion indicator flag. Displays Y (Yes) or N (No), depending on whether the original purchase amount was billed in a currency of the cardholder's choice (usually the customer funded currency) and not the default currency for the cardholder Bank Identification Number or Interbank Card Association Number.
CARDHOLDER AMOUNT	The original amount of the purchase in the currency of the credit/debit card that incurred the transaction. If the transaction is a refund, the amount will be negative.
TRANSACTION AMOUNT	The original amount of the transaction in the customer's submission currency. If the transaction is a refund, the amount will be negative.
CASHBACK AMOUNT	The amount of cash the consumer received back at the time of purchase in the customer's submission currency.
TRANSACTION DATE	The date that the original transaction was authorized according to the POS/terminal.
TRANSACTION TIME	The time the original transaction was authorized according to the POS/terminal, followed by the time zone.
RRN	The unique Retrieval Reference Number generated by the system and returned in each card authorization response message.
TRANS REF TEXT	The internal reference number assigned to the original transaction by the customer.
VOID INDICATOR	Displays Y (Yes) or N (No), depending on whether or not the transaction was voided.
CUSTOM DATA	The unique transaction identifier from the customer.
BATCH CONTROL NBR	An 11-digit number which uniquely identifies the batch. The Batch Control Number is made up of the 3-digit batch number assigned by Elavon to a batch, followed by the date and time the batch was submitted (in MMDDHHSS format).
CONVERSION RATE	The DCC conversion rate.
PAPER/ELECTRONIC	"Paper" or "Electronic" indicator of whether the transactions in the batch were submitted electronically or by paper.
WALLET TYPE	Indicates the scheme of the wallet transaction. "M" for Mastercard - Masterpass and "V" for Visa V.me transactions
WALLET DATA	Information whether the source of digital wallets for Mastercard was Ecommerce or NFC and for Visa Transactions how the digital wallet was authenticated.

DCC Performance

DCC Performance report provides the count and volume of potential, actual and processed Dynamic Currency Conversion (DCC) transactions, estimated rebate received and lost and the DCC take up percentage at Merchant ID (MID) level your card terminal. Available only for customer who have DCC product turned on.

DCC Performance Report	Descriptions
CHAIN ID	The unique client identification number provided to the client by Elavon to allow corporations to tie groups of merchant IDs together.

MERCHANT	The unique identification number provided to the client by Elavon where the transaction took place. It identifies the Merchant Identification Number (MID) that submitted the batch (transactions).
MERCHANT NAME	Name of the Customer
DATE	The first day in the date range for which the report was generated. If the report was generated for one day, the Date *From* and Date *To* will show the same day. The last day in the date range for which the report was generated. If the report was generated for one day, the Date From and Date To will show the same day.
POTENTIAL DCC COUNT	The total number of transactions that were DCC eligible
POTENTIAL DCC VOLUME	The net sales amount that was DCC eligible depicted in the customer's base currency.
ACTUAL DCC COUNT	The number of transactions that qualified for DCC rebate
ACTUAL DCC VOLUME	The net sales amount that qualified for DCC rebate in the customer's base currency.
LOST DCC COUNT	The number of transactions that were eligible but did not qualify for the DCC rebate
LOST DCC VOLUME	The net sales they were eligible but did not qualify for the DCC rebate, depicted in the customer's base currency.
HIT RATE	The percentage of the potential sale volume that was converted.
RATE %	The DCC Rate
POTENTIAL REBATE	The total number of transactions that were DCC eligible
ACTUAL REBATE	The net sales amount that was DCC eligible, depicted in the customer's base currency.
LOST REBATE	The revenue the customer would have earned if they had converted all lost DCC transactions, depicted in the customer's base currency. Appears in red font.
SETTLEMENT CURRENCY	The funded currency of the MID.

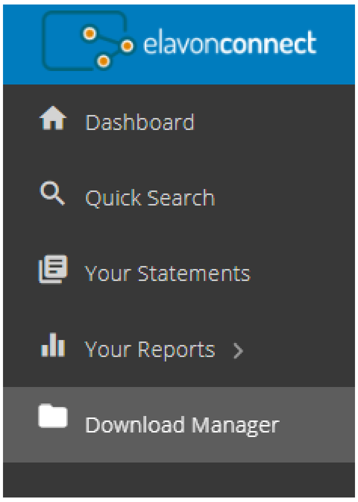
Full List of reports

Check all available reports together with their description.

Customer reports.pdf

Download manager

Download Manager if a location in your Elavon connect account where all downloaded documents are stored for you for a specific period of time.



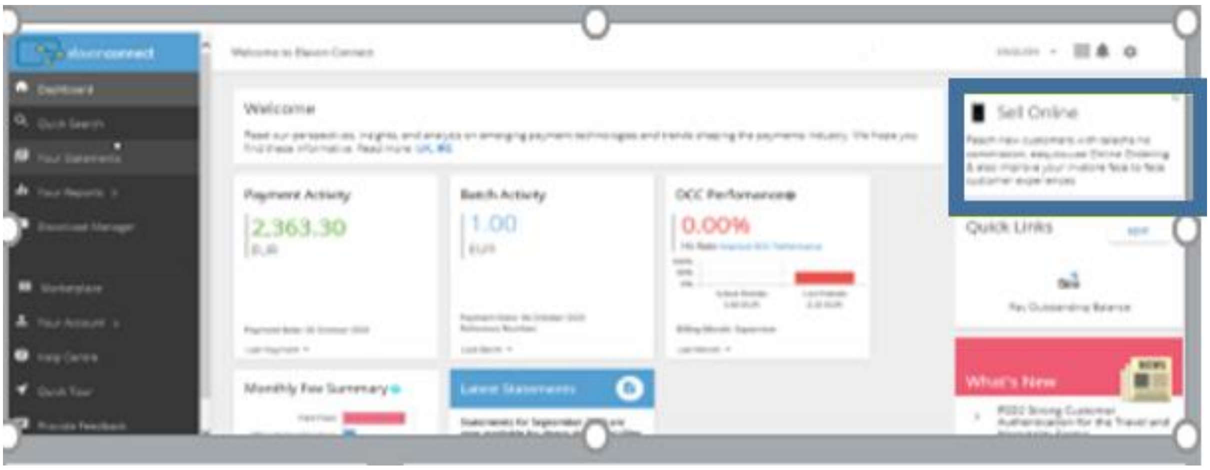
Your **Download Manager** is located in the main left bar menu.

Whenever there is something new awaiting for you in your download manager, the alert bell notifies you

If you run a report, and the report is too large to generate immediately it will be send to your download manager once it is ready.

Chapter 8: Marketplace

Elavon Connect includes periodic offers to our customers. The Marketplace within Elavon Connect showcases business opportunities and offers available to you. Depending on channel, the customer will see offers from their bank, their processing partner, and from Elavon. By clicking on an ad, you can learn more about the opportunity and determine if you are interested in learning more. A button is conveniently located in the ad to direct the customer to either a sign-up page, or the button generates a “contact me” request email to the group making the offer. The advertisement is always located in the top right corner of your dashboard.



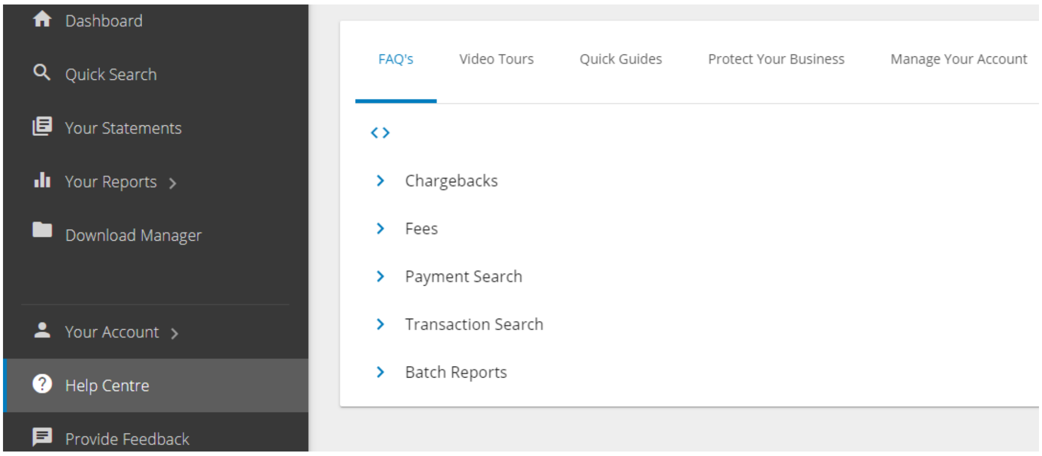
Chapter 9: Additional Options

In the left navigation section, under Your Account, there are three additional sections which are there for you to help you and to help us receive a feedback from you.

Help Centre

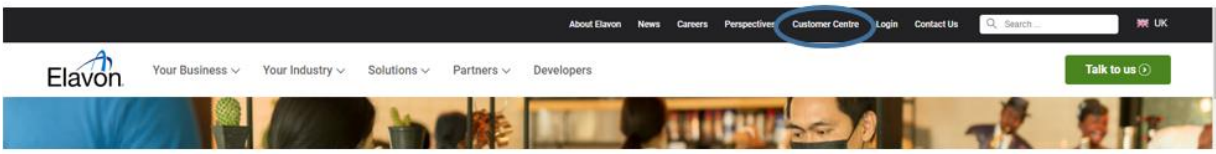
Help centre is a library rich in content which can help you use your Elavon Connect account fully. It has five sections:

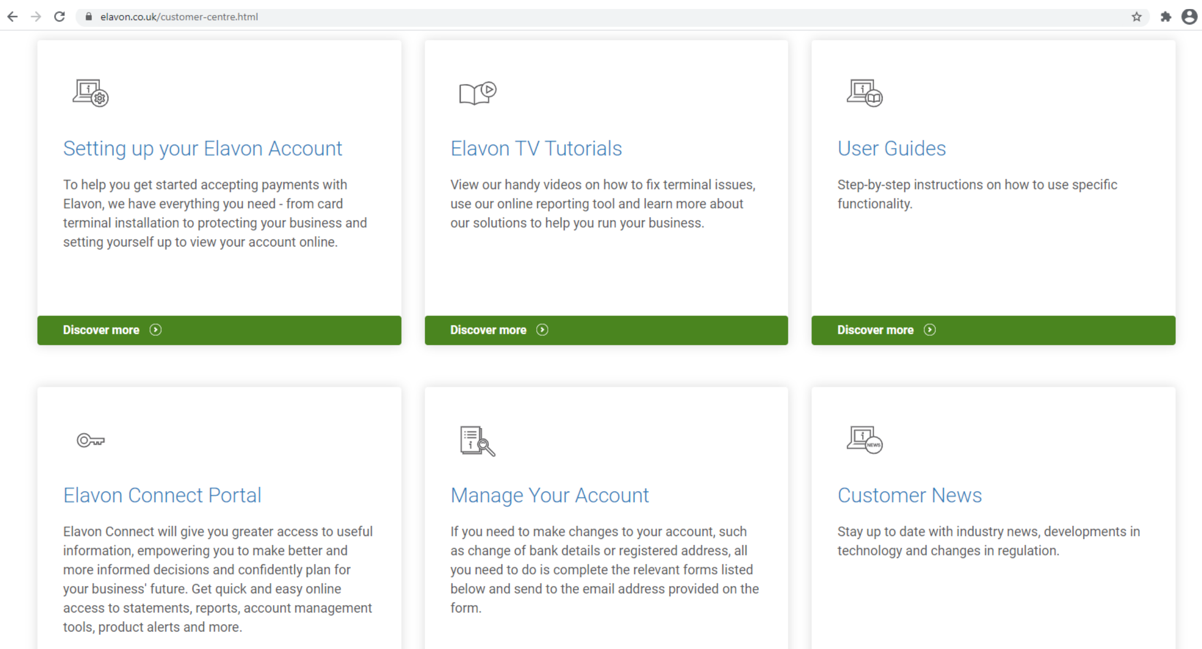
- FAQ (frequently asked questions)
- Video Tours
- Quick Guides
- Protect Your Business
- Manage Your Account.



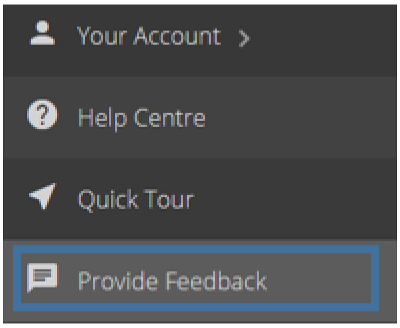
Take a moment to see how Help Centre can be a use for you and what new you can learn there.

Customer Centre on the main Elavo.co.uk page is also a very useful source of information which can help you with many questions you might have.



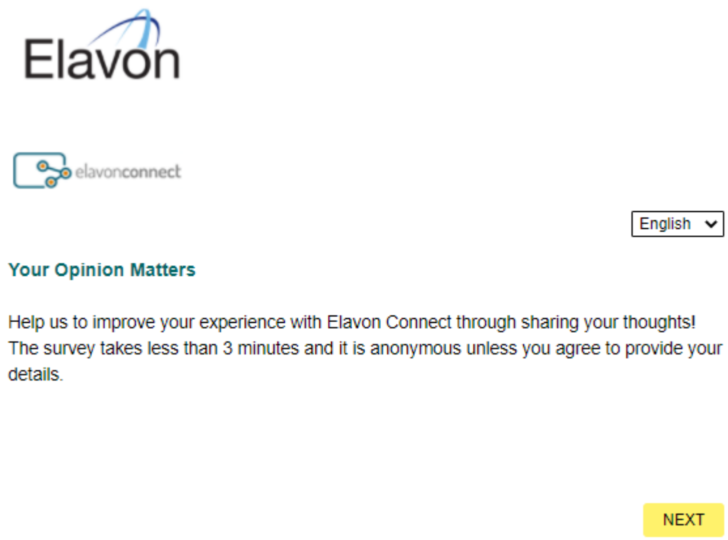


Provide Your Feedback



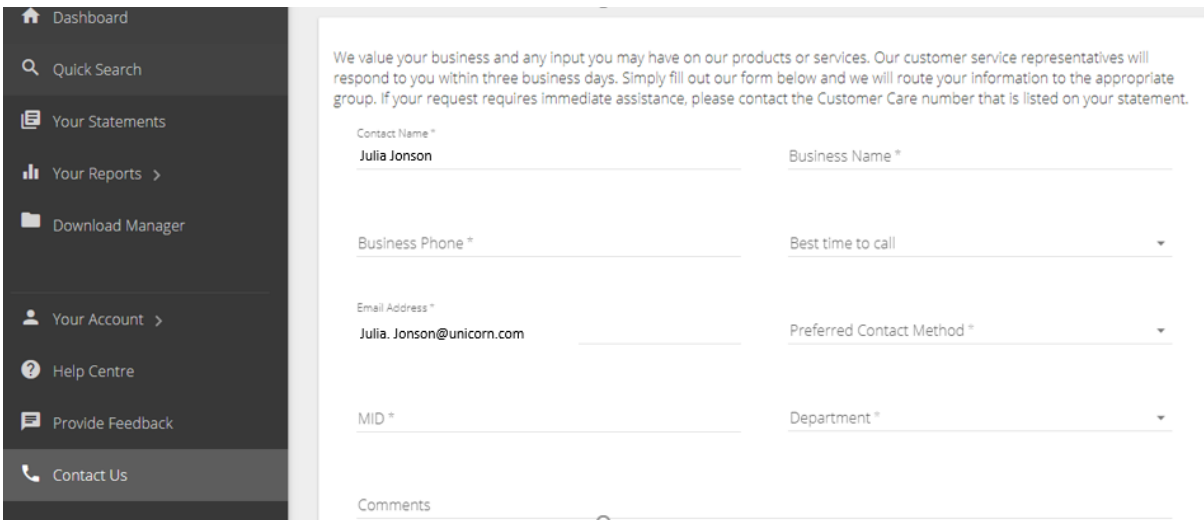
We love to hear from you. Continuous improvement is always our goal. Click the **Provide Feedback** link from the Navigation section to provide information on your role, how Elavon Connect helps you, and ways we can improve your Elavon Connect experience.

Once you click on it, new webpage will open in your internet browser. You will be able to select a language from the drop dawn list.
The survey is very short, takes only about 3 minutes however your opinion will help us make the Elavon Connect experience even better.



Contact Us

Contact Us section will be pre-populated with your name and email address from your profile. Fill up the form and add information regarding your query. Our customer care specialist will contact you to resolve any issue you might came across.



Disclosure

Elavon Financial Services DAC. Registered in Ireland – Number 418442.

Registered Office: Building 8, Cherrywood Business Park, Loughlinstown, Co. Dublin, D18 W319, Ireland.

Elavon Financial Services DAC, trading as Elavon Merchant Services, is regulated by the Central Bank of Ireland.

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