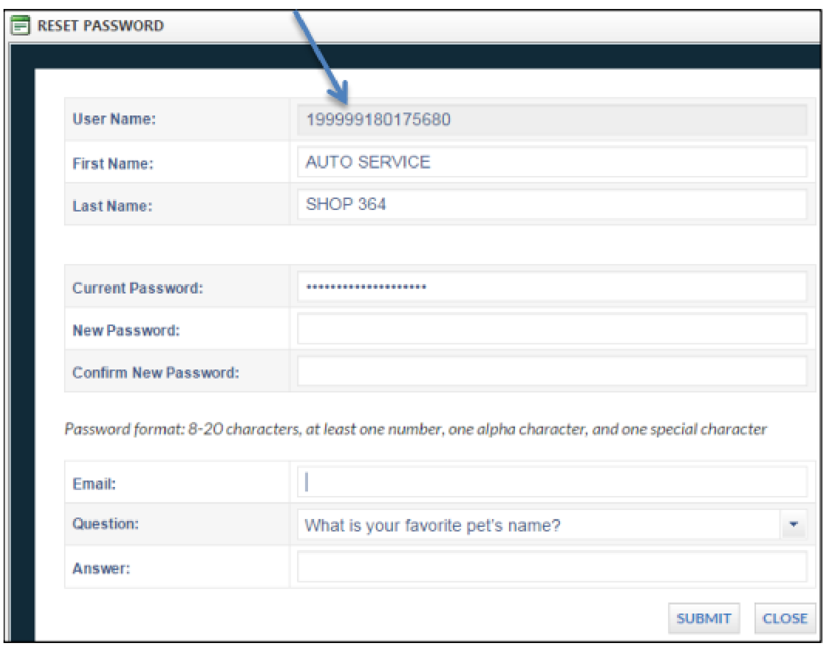
AccessOne
Quick Reference Guide

Initial Set-up/First Time Log-in

The steps below outline what you are required to provide to complete set-up in the application.

• Once you receive the temporary password and account email, click the URL link to update the temporary password and complete your profile and security question setup:

Note: If you receive a Site Not Found error, copy and paste the link in a new browser window.



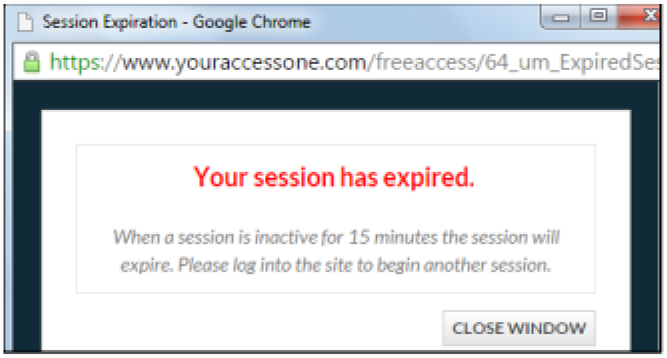
Key Points to Remember

• New users must login and update their login information within **72 hours** or their ID will need to be reset in order for them to access the site.

• All **pop-up blockers must be turned off** in order for new users to access the website link in their set-up/password reset emails.

• Dots or a line under any field is a **Hyperlink** to additional details.

• A user's session automatically **expires** after being inactive for **15 minutes**.



Users are required to change their password six times prior to reusing a previous password.

User Roles

• The Owner will be the Primary Role and has the following functions/access:

  o Access to all merchant level data/screens.

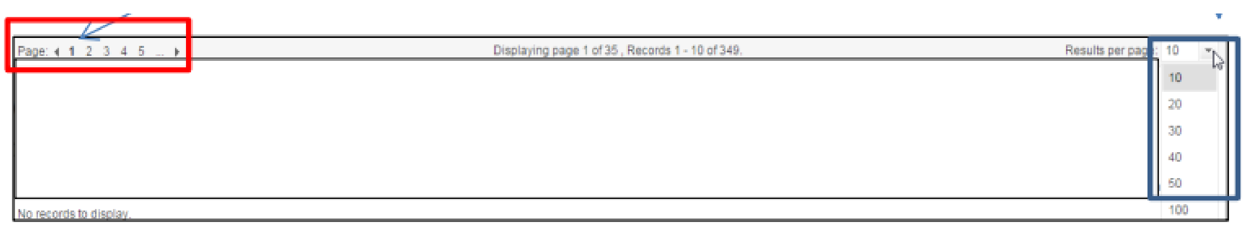
  o Create new users and specify access.

Tool Hints

Navigation hints:

• In all reports, if there is more than one row of data, the tool always defaults to 10 rows. If there are more than 10 rows, you can expand the view up to 100 rows.

• If there is more than 1 page, you can scroll to a new page by clicking a number or the arrow:



• There are often more columns in a report than are viewable on the monitor display. Use the up down and sideways scroll bars to navigate.

Export hints:

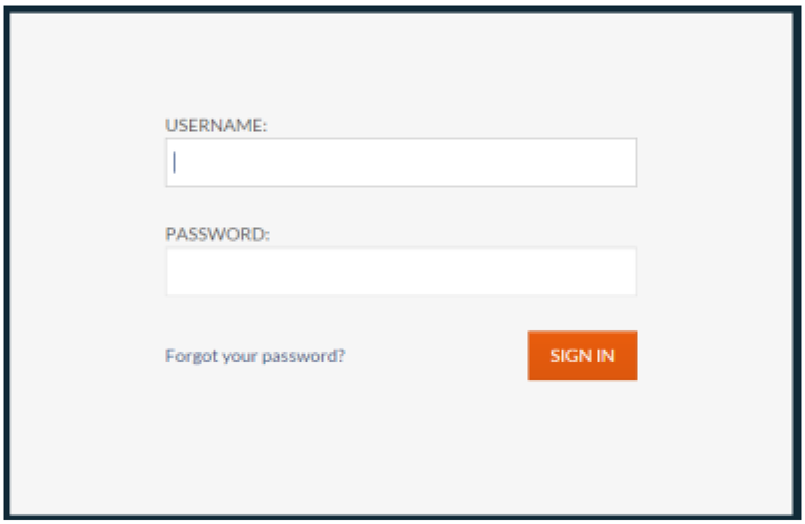
• Reports can be downloaded to either Excel or CSV format.

• Statements and forms can be downloaded as PDF.

Login Process – Accessing the URL

All Merchants access the AccessOne tool via the following link: www.youraccessone.com

At the login screen, type your USERNAME and PASSWORD, and click SIGN IN.



Accessone features

Merchant Offerings:

- Deposit summary and detail
- Up to 18 months of history
- Card search function
- Batch summary/transaction detail
- Statements
- Interchange/Qualification summary and detail (optional)
- 1099-K reporting
- Chargeback and retrieval disposition
- Return transaction Verification/Matching
- Reports are exportable

Report Options Include (but are not limited to):

- Payment History
- Batch History
- Voids / Declines
- Non-Qualifying Transactions
- Authorization Log
- Returns
- Transaction Search
- Retrievals / Chargebacks
- Fixed Acquirer Network Fee Reports
- Merchant Adjustment