Online Help for Partners

cybersource
A Visa Solution

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Contents

Online Help for Partners

This section describes how to use Online Help and where to find further information.

Audience and Purpose

This guide is intended for partners who want to use the Authorize.net Partner Interface. It explains how the various modules work and how to perform basic tasks.

Conventions

These statements appear in this document:

> **Important:** An *Important* statement contains information essential to successfully completing a task or learning a concept.

Customer Support

For support information about this pilot release, visit the Authorize.net LinkedIn Community:

https://www.linkedin.com/groups/14472067/

For support outside normal business hours, visit the Authorize.net Support Center:

http://support.authorize.net

Recent Revisions to This Document

24.02

Added topic for toggling between the classic and new UX.

See Toggling Between Classic And New Authorize.net (on page 7).

Updated user management, merchant management, and portfolio management sections.

Updated Dashboard Quick Actions.

24.01

First draft.

24.02

Toggling Between Classic And New Authorize.net

You can toggle between the new Authorize.net UX and the classic Authorize.net UX at any time. The toggle is in the main header on any screen.

Full feature parity is not available currently. If you need to use any feature that is not yet available in the new UX, you can toggle to the classic UX to use this feature. You can then go back to the new UX to take advantage of the better user experience.

The following table lists the product capabilities available in the new UX:

Theme	Feature
Merchants	Board a merchant
	See a list of merchants and use quick filters on this list
	See details of a merchant
	Manage a merchant
Users	Add users
	Manage users
Sales profiles	Add sales profile
	Manage sales profiles
Reports	Residuals
	Past-due merchants
	Merchant processing
	Merchant onboarding
	Merchant details
	Pending activation

Keep in mind that once you start using the new Authorize.net UX, all the merchants you board will automatically have the new Authorize.net UX, even if you toggle back to use the classic Authorize.net UX. Your merchants have the option to toggle back to the classic Authorize.net UX at any time.

Dashboard

The Dashboard module enables you to access quick actions, view business insights, read the news center, and take action on tasks that require your attention.

Quick Actions

The Quick Actions module enables you to access frequently used features of the Partner Interface from the Dashboard.

Default quick actions include:

- Add merchant
- Manage merchants
- Create sales profile
- Manage sales profile

Business Insights

The Business Insights module enables you to view key business metrics and trends over specific, customizable time periods.

Available business insights include:

- Net and Gross Residual Revenue over last 12, 24, and 36 months.
- Total status of merchants broken down by status (active, never been activated, past due, and deactivated).

News Center

The News Center module enables you to view recently announced product updates and to receive marketing tips that help you grow your business.

Tasks

The Tasks module enables you to review and take action on a list of current action items from the last six months.

Tasks include, but are not limited to tasks from Manage Merchants Quick Filters, such as Merchants Past Due.

Merchants

The Merchants module enables you to add and manage merchants.

Add Merchant

The Add Merchant module enables you to complete these actions:

- Edit the merchant's account information.
- Configure products for the merchant.

Adding a Merchant

Follow these steps to add a merchant.

1. Choose **Merchants > Add Merchant**.
2. Select a sales profile:
   a. In the **Sales Profile** box, click **(expand)** to select a sales profile from a list. If you do not have a sales profile, click **Create a New Sales Profile**. See Creating Sales Profiles (on page 27) for more information.
   b. **Optional**: click **See pricing** to review the pricing for the Advanced Fraud Detection Suite and Card Processing.
   c. Click **Next**. Or, click **Cancel** if you do not wish to save your changes.
3. Add the merchant account information:
   a. **Optional**: enter the merchant reference ID, if your business has one. The reference ID can be up to 20 characters.
   b. **Optional**: enter the sales rep ID if your business assigned you a unique ID for tracking sales. The sales rep ID can be up to 10 characters.
   a. **Required**: enter the business name.
   b. **Required**: enter the merchant category code (MCC) in the **Merchant Category Code** field, or click **(expand)** to choose the merchant category code from a list.
   c. **Optional**: enter the website address.

4. Add the merchant's location:

    a. **Required**: enter the merchant's country in which they are based in the **Country** box, or click **(expand)** to choose the country from a list.

    b. **Required**: enter the country code for the merchant's phone number in the **Country Code** box, or click **(expand)** to choose the country from a list.

    c. **Required**: enter the phone number for the merchant.

    d. **Required**: enter the address for the merchant.

    e. **Optional**: enter the second line of the merchant's address, if there is one.

    f. **Required**: enter the merchant's city.

    g. **Required**: enter the merchant's state, province, or region in the **State/Province/Region** box, or click **(expand)** to select the state, province, or region from a list.

    h. **Required**: enter the ZIP code or postal code for the merchant.

5. Add the merchant's owner information:

    a. **Required**: enter the owner's first and last name.

    b. **Optional**: enter the owner's middle name.

    c. **Required**: enter the country code for the owner's phone number in the **Country Code** box, or click **(expand)** to select the country from a list.

    d. **Required**: enter the phone number for the owner.

    e. **Required**: enter the owner's email address.

6. Click **Next**.

7. Edit the merchant's processor configuration:

    a. Under Card Processing, click **Configure**.

    b. **Required**: from the options available in the **Processor Name** drop-down menu, select a processor.

    c. **Required**: enter the processor configuration for the merchant.

    d. Check or uncheck the **Accepted Card Types** boxes to match the cards accepted by the merchant for this processor.

    e. Click **Save** to save the processor for this merchant. Or, click **Cancel** if you do not wish to save your changes.

8. Edit the merchant's Advanced Fraud Detection Suite (AFDS) configuration:

a. Under Advanced Fraud Detection Suite (AFDS), click **Configure**.

b. For the Daily Velocity filter, enter the number of transactions per day that you want to set as a limit, and choose an action from the **Take the following action** drop-down menu.

c. For the Transaction IP Velocity filter, enter the number of transactions per hour per unique IP address that you want as a limit, and choose an action from the **Take the following action** drop-down menu.

d. For the Hourly Velocity filter, enter the number of transactions per hour that you want as a limit, and choose an action from the **Take the following action** drop-down menu.

e. For the Transaction Amount filter, enter the minimum and maximum transaction amounts that you want as a limit, and choose an action from the **Take the following action** drop-down menu.

f. For the Fraud Pattern Filter, choose an action from the **Take the following action** drop-down menu.

g. Click **Save** to save the AFDS configuration for this merchant. Or, click **Cancel** if you do not wish to save your changes.

9. Confirm the merchant information. If you need to make changes, click **Edit** next to the section you wish to update.

10. Click **Add merchant**. Or, click **Cancel** if you do not wish to save your changes.

The merchant is added, and receives an activation email at the email address provided.

Manage Merchants

The Manage Merchants module enables you to complete these tasks:

- View the merchants in your account.
- Edit existing merchants.

Managing Merchants

To view and edit the configuration for your merchants:

1. Choose **Merchants > Manage Merchants**.
2. To add a new merchant, click **Add Merchant**. You will be taken to the **Add Merchant** page. See Adding a Merchant (on page 10) for more information.
3. **Optional**: enter your search criteria in the Search Merchants box. You can search by either merchant name, gateway ID, or reference ID.
4. To see additional search results, use the pagination buttons at the bottom-left corner of the page.
5. **Optional**: if the merchant has not yet activated and the previous link has expired, click **Resend activation link** under the Actions column to resend the activation link email.
6. Click the name of the merchant that you wish to manage.
7. To edit the merchant account information, click **Edit**.
   a. **Optional**: edit the reference ID.
   b. **Optional**: edit the sales rep ID.
   c. **Optional**: edit the business address.
8. **Optional**: edit the pricing configuration for card processing:
   a. Click **View/edit configuration**.
   b. Update the processor, credentials and accepted card types as needed.

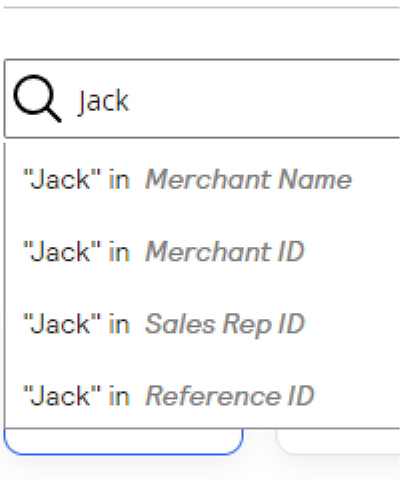
   > **Important:** At this time, you cannot subsidize line items by setting the sell rate lower than the buy rate. You may leave the sell rate the same as the buy rate, or increase the sell rate.

   c. Click **Save** when you have adjusted the sell rates for all line items. Or, click **Cancel** if you do not wish to save your changes.

Using Quick Search and Filters

Quick Search

Quick Search enables you to search for merchants flexibly.



When you use Quick Search without a filter, it returns results that match these categories:

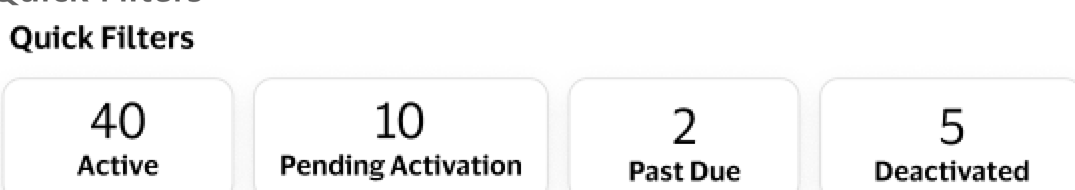
- Merchant Name
- Merchant ID
- Sales Rep ID
- Reference ID

Click on the Quick Search suggestion to view merchants who meet the search criteria.

Filters

Click **(clear)** to remove optional filters from the search.

Quick Filters



Quick filters enable you to view merchants which might require action.

Quick filters include these options:

Active

Shows merchant accounts that are activated.

Pending Activation

Shows merchant accounts that are not activated.

Past Due

Shows merchant accounts that have an outstanding balance.

Deactivated

Shows merchant accounts that have been deactivated.

Merchant Details

The Merchant Details page displays information for the merchant that you selected.

The Transaction Details page consists of two sections:

- **Merchant Account Information**: Shows the business information, business address, and owner information for the merchant account.
- **Product Configuration**: Shows the products available for the merchant account.

You can take actions on the merchant account from the Merchant Details page:

- To edit merchant account information, click **(edit)**.
- To view product pricing, click **See pricing**.
- To change the processor configuration, click **View/edit configuration**.

Click the Quick Search suggestion to view transactions that meet the search criteria. Some Quick Search suggestions become filters.

Reports

The Reports module enables you to access summarized and detailed information on multiple reports.

The Reports module includes the following:

- Residual Reports
- Past Due Merchant Reports
- Pending Activation Reports
- Merchant Details Reports
- Merchant Processing Reports
- Merchant Onboarding Reports

Residual Reports

The Residual Reports module enables you to:

- View a breakdown and summary of the residual you've earned for the month.
- View the residual generated from each merchant, and which product fees they came from.

Viewing Residual Reports

1. Choose **Reports > Residual Reports**.
2. Click **(expand)** at the end of the **Available Reports** box and select Residual Reports.
3. Click **(expand)** at the end of the **Year Selector** box and select the desired year.
4. Click **(expand)** at the end of the **Month Selector** box and select the desired month.
5. **Optional**: click **Download report** to download the report as a CSV file.

Residual Reports Summary Tab

The summary tab shows key metrics, graphs, and tables to assist in data analysis.

Residuals

The Residuals section shows a breakdown of gross residual earned, total adjustments, and net residual earned.

Gross Residuals by Fee

The Gross Residuals by Fee section shows a breakdown of how much residual was earned per fee type and what percentage each fee has contributed to your total residual revenue.

Gross Residuals include these types of fees:

- Setup fee residual
- Gateway fee residual
- CC transaction residual
- eCheck.net residual
- Advanced fraud detection suite residual
- Automated recurring billing residual
- Account updater residual
- Total other fee residual

Top Residual Generators

The Top Residual Generators section shows the top residual earning merchants in your portfolio. The breakdown shows the net residual earned and the percentage that merchant has contributed to your total residual revenue.

Residual Reports Details Tab

The Details tab shows individual merchant residual information, including:

- Residual earned by each product fee
- Adjustment amount
- Total collection attempt
- Total amount of fees subsidized by you
- Net residual earned

Click **(sort)** next to each column title to sort information in ascending or descending order.

Click the merchant's gateway ID to go to the merchant information page.

Click the merchant's Net Residual column to view the residual breakdown for each merchant.

Past Due Merchant Reports

The Past Due Merchant Reports enables you to see a breakdown of the merchants that are currently carrying an unpaid balance.

Viewing Past Due Merchant Reports

1. Choose **Reports > Standard Reports**.
2. Click **(expand)** at the end of the **Available Reports** box and select Past Due Merchant Reports.
3. **Optional**: click **Download report** to download the report as a CSV file.

Past Due Merchant Reports Summary Tab

The Summary tab shows key metrics, graphs, and tables to assist in data analysis.

Past Due Merchants

The Past Due Merchants section displays the total number of past due merchants in your portfolio and their total unpaid balance.

Merchants by Billing Status

The Merchants by Billing Status section graphically represents the ratios of past due merchants by each stage of delinquency:

- Past due merchants have held an unpaid balance for 30 or fewer days.
- Collections merchants have held an unpaid balance for more than 30 days.

Past Due Merchant Reports Details Tab

The Details tab shows individual merchant residual information, including:

- Billing status
- Past due balance
- Collections balance

Click the sorting arrows next to each column title to sort information in ascending or descending order.

Click the merchant's gateway ID to go to the Merchant Details page.

Pending Activation Reports

The Pending Activation Reports displays the merchants that you have boarded but have never activated their account.

Viewing Pending Activation Reports

1. Choose **Reports > Standard Reports**.
2. Click **(expand)** at the end of the **Available Reports** field and select Pending Activation Reports.
3. **Optional**: click **Download report** to download the report as a CSV file.

Pending Activation Reports Summary Tab

The Summary tab shows key metrics, graphs, and tables to assist in data analysis.

Pending Activation Total

The Pending Activation Total section displays the total number merchants you have boarded that have never activated their account.

Pending Activation by Age

The Pending Activation by Age section graphically represents the age in days of your merchant accounts that are pending activation.

Pending Activation Reports Details Tab

The Details tab shows individual merchant information including:

- Address
- Primary contact
- Date boarded
- Days since boarding

Click **(sort)** next to each column title to sort information in ascending or descending order.

Click the merchant's gateway ID to go to the merchant information page.

Merchant Details Reports

The Merchant Details Reports contains information for all merchants in your portfolio. This report can be used to gain valuable insight into your customer base, or exported for external use.

Viewing Merchant Details Reports

1. Choose **Reports > Standard Reports**.
2. Click **(expand)** at the end of the **Available Reports** field and select Merchant Details Reports.
3. **Optional**: click **Download report** to download the report as a CSV file.

Merchant Details Reports Summary Tab

The Summary tab shows key metrics, graphs, and tables to assist in data analysis.

Total Merchant Count

The Total Merchant Count section displays the total number merchant accounts in your portfolio.

Active vs Inactive Merchants

The Active vs Inactive Merchant section graphically represents the ratio of active and inactive merchants in your portfolio.

Product Enablement

The Product Enablement section graphically represents the ratio of value added service enablement across the merchants in your portfolio.

Top Sales Reps by Number of Merchants

If your organization populates the Sales Rep ID field in the merchant information section of boarding, the Top Sales Reps by Number of Merchants section will display the top sales rep in your portfolio by number of merchants.

Top Merchant Category Codes (MCC)

The Top Merchant Category Codes (MCC) section shows you the top merchant categories in your portfolio.

Merchant Details Reports Details Tab

The Details tab shows individual merchant information including:

- Address
- Primary Contact
- Date Added
- Account Status

Click the merchant's gateway ID to open an Additional Merchant Details panel that includes the following merchant information:

- Merchant category code
- Product enablement statuses

Click **(sort)** next to each column title to sort information in ascending or descending order.

Click **View all merchant details** at the bottom of the panel to go to the Merchant Details page.

Click **Close** to close the Additional Merchant Details panel.

Merchant Processing Reports

The Merchant Processing Reports provides insight into the transaction counts and volumes of your merchants across the various products.

Viewing Merchant Processing Reports

1. Choose **Reports > Standard Reports**.
2. Click **(expand)** at the end of the **Available Reports** field and select Merchant Processing Reports.
3. Click **(expand)** at the end of the **Year Selector** field and select the desired year.
4. Click **(expand)** at the end of the **Month Selector** field and select the desired month.
5. **Optional**: click **Download report** to download the report as a CSV file.

Merchant Processing Reports Summary Tab

The Summary tab shows key metrics, graphs, and tables to assist in data analysis.

Total Transacting Merchant Count

The Total Transacting Merchant Count section displays the total number transacting merchants in your portfolio.

- Transacting merchants are those that have transaction volume in any product for the selected month and year.
- Merchants that have no volume in the selected month and year will not appear in the report.

Count of Transactions Processed by Product

The Count of Transactions Processed by Product section graphically represents the count of transactions processed by your merchants relative to the various products.

Volume of Transactions Processed by Product

The Volume of Transactions Processed by Product graphically represents the dollar volume of transactions processed by your merchants relative to the various products.

Average Transaction Value by Product

The Average Transaction Value by Product section graphically represents the dollar volume of transactions processed by your merchants relative to the various products.

Top Merchants

The Top Merchants section displays transaction count and volume of the top transacting merchants by product.

Click **(expand)** to show available products, including:

- Overall
- Credit card
- eCheck
- Alternative payments

If you have merchants that have transactions with a selected product, the results will be displayed. Otherwise, a No Data Available message will appear.

Merchant Processing Reports Details Tab

The Details tab shows individual merchant information including:

- Credit card count
- Credit card volume
- Alt pay count
- Alt pay volume
- eCheck count
- eCheck volume

Click **(sort)** next to each column title to sort information in ascending or descending order.

Click the merchant's gateway ID to go to the Merchant Details page.

Merchant Onboarding Reports

The Merchant Onboarding Report provides insight into merchants you have boarded in a particular month.

Viewing Merchant Onboarding Reports

1. Choose **Reports > Standard Reports**.
2. Click **(expand)** at the end of the **Available Reports** field and select Merchant Onboarding Report.
3. Click **(expand)** at the end of the **Year Selector** field and select the desired year.
4. Click **(expand)** at the end of the **Month Selector** field and select the desired month.
5. **Optional**: click **Download Report** to download the report as a CSV file.

Merchant Onboarding Reports Summary Tab

The Summary tab shows key metrics, graphs, and tables to assist in data analysis.

Merchants Boarded

The Merchants Boarded section displays the total and daily average number of merchants you have boarded in the selected month and year.

Merchants Boarded Per Day

The Merchants Boarded Per Day section graphically represents the daily merchant boarding trend in the month and year selected.

Volume of Transactions Processed by Product

The Volume of Transactions Processed by Product section graphically represents the dollar volume of transactions processed by your merchants relative to the various products.

Top Sales Reps by Merchants Boarded

If your organization uses the Sales Rep ID field during boarding, this section displays the top sales reps by merchants boarded in the selected month.

Top Merchant Category Codes

The Top Merchant Category Codes section displays the top merchant categories boarded in the selected month.

Merchant Onboarding Reports Details Tab

The Details tab shows individual merchant information including:

- Address
- Payment details
- Active
- Date created
- Sales rep ID

Click **(sort)** next to each column title to sort information in ascending or descending order.

Click the merchant's gateway ID to go to the Merchant Details page.

Portfolios

The Portfolios module enables you to create and manage merchant sales profiles.

Create Merchant Sales Profiles

The Create Merchant Sales Profiles module enables you to: complete these tasks:

- Create templates for merchants that you wish to support.
- Set products and pricing for your merchants.

Creating Sales Profiles

Creating sales profiles enable you to set up various sell rates and supported products for different types of merchants. For example, you might want to have different sell rates for high-volume merchants, or provide products only for a certain type of merchant.

1. Choose **Portfolios > Create Sales Profile.**
2. **Required**: enter the Sales Profile Name.
3. **Optional**: check the **Set as default sales profile** box to be presented with this sales profile when you add a new merchant.
4. In the **Sales Profile Description** field, enter a description of the merchant.
5. **Optional**: edit the pricing for card processing:
    a. Click **Edit pricing**.
    b. Review the sell rates for each line item, and update as needed.

    > **Important:** At this time, you cannot subsidize line items by setting the sell rate lower than the buy rate. You may leave the sell rate the same as the buy rate, or increase the sell rate.

    c. Click **Save** when you have adjusted the sell rates for all line items. Or, click **Cancel** if you do not wish to save your changes.
6. Edit the default processor for the sales profile:

a. Click **Edit processor**.

b. Choose a processor from the **Processor** drop-down menu.

c. Click **Save** to save the processor for this sales profile. click **Cancel** if you do not wish to save your changes.

7. Click **Create sales profile** to save the sales profile. Or, click **Cancel** if you do not wish to save your changes.

The sales profile is created and available for use.

Manage Merchant Sales Profiles

The Manage Merchant Sales Profiles module enables you to complete these actions:

- View existing merchant sales profiles
- Edit existing merchant sales profiles

Managing Sales Profiles

To manage existing sales profiles:

1. Choose **Portfolios > Manage Sales Profiles**.
2. To create a new sales profile, click **Create sales profile**. See Creating Sales Profiles (on page 27) for more information.
3. **Optional**: enter your search criteria in the **Search Profiles** box. You can search by either profile name or profile ID.
4. To see more search results, use the pagination buttons at the bottom-left corner of the page.
5. Click the sales profile that you wish to manage.
6. Edit the sales profile:

    a. **Optional**: update the sales profile name.

    b. **Optional**: update the sales profile description.

    c. **Optional**: to change the default processor, click **Edit processor**.

7. If you are ready to save your changes, click **Save**.

8. If you decide not to edit the merchant, click **Cancel**.

> **Important:** You cannot currently edit the sell rates for existing products. Create a new sales profile if you need to adjust the sell rates.

Account

The Account module enables you to add and manage users.

Add User

The Add User module enables you to add a new user to your account.

Adding Users

To add a user:

1. Choose **Account > Add User**.
2. Enter the user's information:
    a. **Required:** enter the user's title.
    b. **Required:** enter the user's first name.
    c. **Required:** enter the user's last name.
    d. **Required:** enter the user's email address.
    e. **Required:** enter the user's phone number.
    f. **Required:** enter the user's login ID.
3. Click **Admin** to give the user full account permissions. Click **Associate** to prevent the user from adding and editing sales profiles, or from viewing, adding, and editing users.
4. Click **Add User**. Or, click **Cancel** if you do not wish to save your changes.

The user account is created, and the user receives an activation email at the email address provided.

Manage Users

The Manage Users module enables you to complete these actions:

- View existing users
- Edit existing users

Managing Users

To manage existing users:

1. Choose **Account > Manage Users**.
2. **Optional**: enter your search criteria in the Search User box. You can search by name, login ID, or email address.
3. To see more search results, use the pagination buttons at the bottom-left corner of the page.
4. Click the name of the user you wish to edit.
5. Edit the user's information:
   a. **Required:** enter the user's title.
   b. **Required:** enter the user's first name.
   c. **Required:** enter the user's last name.
   d. **Required:** enter the user's email address.
   e. **Required:** enter the user's phone number.
   f. **Required:** enter the user's login ID.
6. Click **Delete User** if you are removing the user from your account.
7. If you are ready to save your changes, click **Save**.
8. If you decide not to edit the user, click **Cancel**.

> **Important:** You cannot change the role for an existing user. Create a new user if you need to change the role.