BusinessTrack®
Reporting

Quick Start Guide

APPLICATIONS - access applications assigned to user profile.

CARD PROCESSING SUMMARY - displays 7 Day summaries for Net Sales and Expenses.

CONTACTS - displays bank contact information.

STATEMENTS - electronic statement copies for previous thirteen months available online.

DISPUTES - displays total count and amount for outstanding Retrievals and Chargebacks, with hyperlinks to eIDs.
BusinessTrack® Reporting

Thank you for signing up for Business Track®. With Business Track you will be provided:

CLIENTLINE REPORTING: View payment processing information such as sales, bank deposits, and statements. Access to over 150 scheduled reports, viewable online or available via email.

DISPUTE MANAGER: Receive, view and respond to chargeback and retrieval disputes online.

ALERTS: Receive notifications by email for events related to Reconciliation and Disputed activities.

Why use BusinessTrack®?

Setup scheduled reports to be delivered daily, weekly, or monthly to your email address or fax number. Business Track allows you to view:

- CARD PROCESSING SUMMARY
- MONTHLY STATEMENTS: Credit and Debit card activity
- DISPUTES: Information with hot link to online tool
- CARD PROCESSING ACTIVITY: Summary of card processing details
- REPORTS: Email wherever you need

Stay Connected to your Business when you are on the Go

Download the free BUSINESS TRACK MOBILE APP for your Apple® or Android™ devices at businesstrack.com.

Business Track Mobile® makes it quick and easy to access your Business Track® Reporting information anytime and anywhere. For more information, speak to one of our Businesss Consultants at 1-888-263-1938 or visit www.firstdata.com/canada.
To ENROLL, you must REGISTER as detailed below.

Registering for BusinessTrack®

Once you are registered, you will be provided the user ID and password to login to Business Track®.

2. Click ENROLL to continue to the next steps.

3. Click BEGIN ENROLLMENT.

4. Complete all the fields and then click NEXT.
• **MERCHANT #** (Merchant ID Number)

To view a **SINGLE LOCATION**, enter your 11 digit Merchant ID number (MID). To view **MULTIPLE LOCATIONS**, enter your 7 digit Merchant ID number (MID) or if you have a single location and are funded under your 7 digit Merchant ID number (MID), enter your 7 digit MID.

You can find the Merchant ID Number (MID) by looking at the bank descriptor on your bank/credit union statement. It will either be 7 or 11 digits in length.

• **BUSINESS CHECKING ACCOUNT #**

This account number will be the account number where we deposit your money and will need to match what we have on our records. The number is 12 digits in length and should not include your bank/credit union route & transit number.

• The **TAX ID** is not required for Canadian Merchants.
• BANK SORT CODE/TRANSIT #

Your branch transit number is a 5-digit number comprised of your 4-digit branch number, followed by a number at the end of your branch number indicating the geographical location of your branch.

Refer to the image below for a graphical representation.

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• PERSONAL CONTACT INFORMATION

Enter all your personal contact information.

• SECRET QUESTION AND ANSWER

Select a question and answer that you will not likely forget.

• TYPE THE RED MOVING LETTERS

• Press NEXT.

5. Select the application you would like to use:

- CLIENTLINE REPORTING – Online reconciliation tool. Often used to view detailed funding activity.
- DISPUTE MANAGER – Chargeback and Retrieval Management Tool
- MERCHANT ALERTS – Receive text or email notifications for your account activity.
6. The next page confirms that your information has been submitted for approval. Once approved, you will receive an email with more information.

Completing your registration

It may take 24-48 hours to receive the approval/confirmation email.

1. In your CONFIRMATION EMAIL, you will receive a USER ID and link to complete the enrollment process.

2. Once you receive the email, click on the hyperlink in the email. The Business Track® website will open in your browser.

3. Enter your USER ID (cl.xxxxxxx), provide the image validation and click Next.

![Image of User ID field and Moving Letters]

4. Answer your SECRET QUESTION and click Next. You answered the SECRET QUESTION during the first part of your enrollment.

5. Read and then click the box next to Agree to the Terms and Conditions and click Next.

You will see a summary of the information you provided.

![Image of Verify and edit information screen]

This must match with what you provided during your initial request for enrollment. Click Next to continue.
6. The screen will display your TEMPORARY PASSWORD. Write it down as you will need it on the next screen. When you are ready, click LOGIN and your web browser will open to the Business Track® login screen.

7. Enter your USER ID (cl.xxxxxx) and TEMPORARY PASSWORD and click LOGIN.

You will see the Reset Password page.

8. You will need to change your TEMPORARY PASSWORD. There are guidelines provided on the screen.

9. Click CHANGE PASSWORD when ready.

You now have access to Business Track.

You will now have the opportunity to determine which EMAIL ALERTS you wish to receive from the system.

10. Click Set Preferences or Remind me later if you do not want to set alerts at this time.

11. Once you are done, you will see your main Business Track homepage.
Login to BusinessTrack®

2. Select MERCHANT LOGIN.
3. Enter your USER ID and PASSWORD, and click SUBMIT.
4. Select REPORTING from the MAIN MENU.

If you are a single location user, you will proceed directly to the REPORTING DASHBOARD. If you have multiple locations, you will see a dropdown menu.

BusinessTrack® Support

For support call CUSTOMER SERVICE at 1-888-263-1938, OPTION 3 anytime (24 hours a day/ 7 days a week).

Additional information is also provided on our website: www.firstdatacanada.ca/support