openedge
A division of globalpayments

OpenEdge View USER HELP

MERCHANT SALES: 800-637-8268

- New Merchant Accounts

PARTNER PROGRAMS: 800-637-8268

- New and existing partnerships

CUSTOMER CARE: 800-338-6614

- Existing merchant account support
- Statements and deposits
- Changes to existing merchant accounts
- Technical Support

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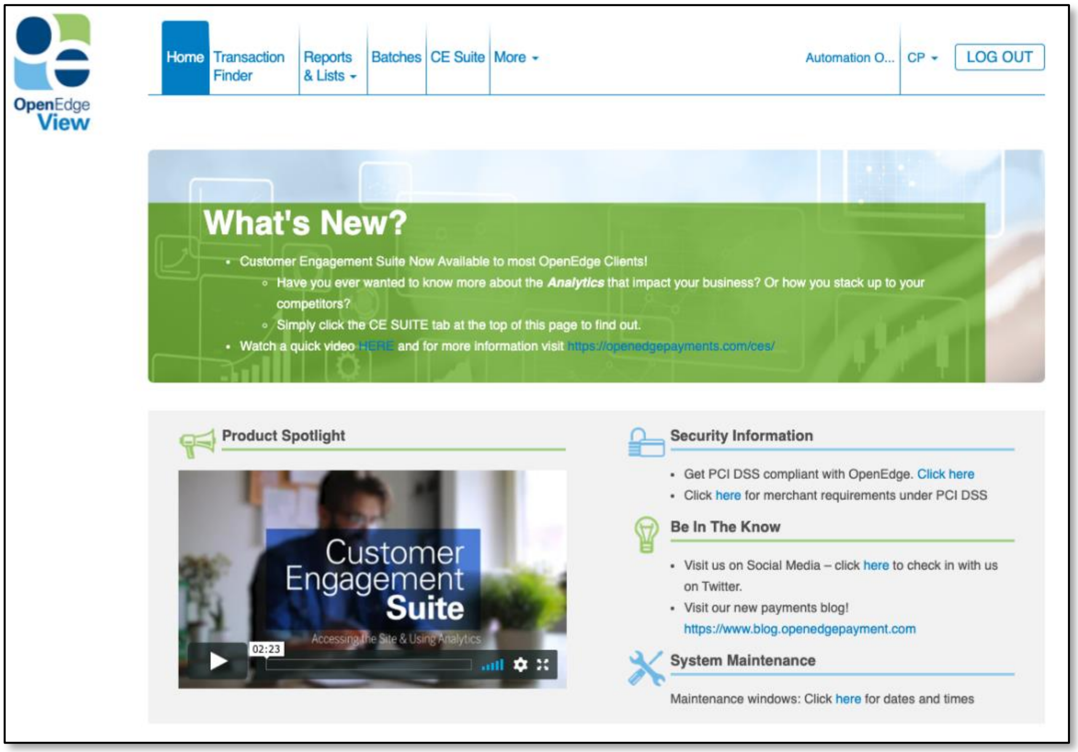
OVERVIEW

The OpenEdge View Merchant Portal is a real time web-based application that equips you with various Merchant Management options for creating, modifying, and administering merchant configuration. OpenEdge View provides the ability to view transaction and batch reports. OpenEdge View also provides the Customer Engagement Suite. The Customer Engagement Suite provides valuable data on Analytics, Demographics, and Social Reputation.

On the first time logging in, OpenEdge View requires that you reset your password. For security purposes, you will be automatically logged out after 15 minutes of inactivity.



OpenEdge View Password Policy

- OpenEdge View assigns User IDs based on the email address provided.
- Passwords must be between 8 and 15 characters in length, and must contain at least one upper and lower case letter, one number, and must not start or end with a space.
- Special characters are recommended, but not required.
- OpenEdge View will require passwords to be changed after 90 days from the date they are created or last changed.

Passwords should not be re-used, and OpenEdge View will not allow any of the user's previous passwords to be used.

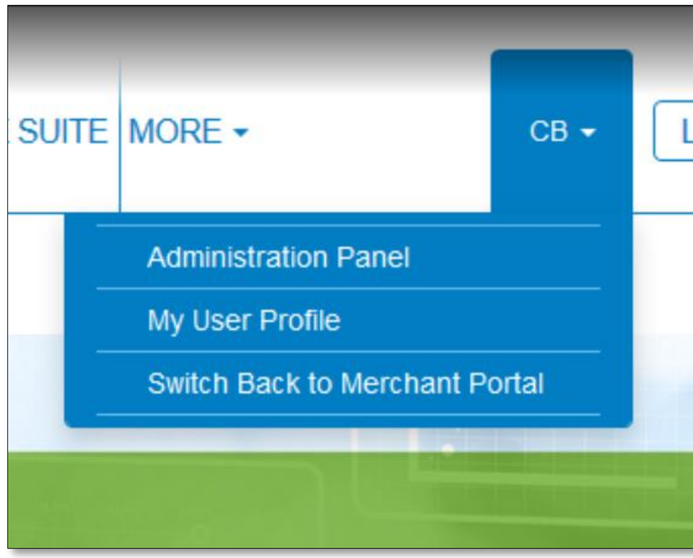
THE FUTURE OF LEGACY MERCHANT PORTAL

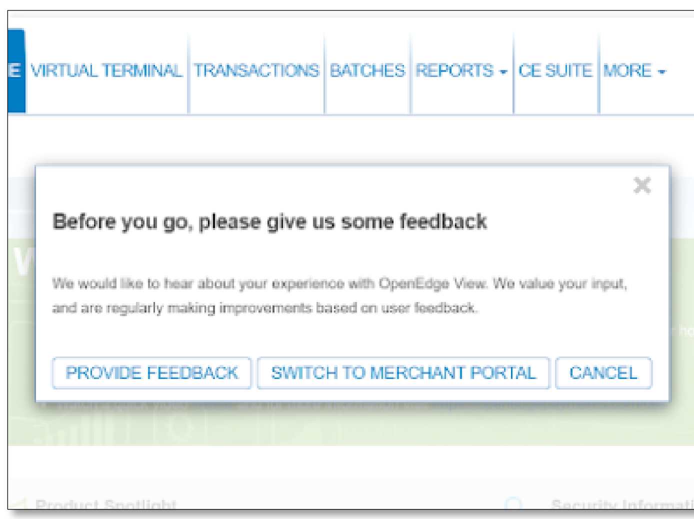
OpenEdge View is the new go-forward home for our merchants to access their OpenEdge data. In support of this, we plan to sunset the legacy Merchant Portal in 2020. Users of our legacy Merchant Portal application now have the ability to switch to OpenEdge View. After the switch, you will be redirected to OpenEdge View, and your existing Merchant Portal credentials can be used to login.

Switch Back to Merchant Portal

Once you have switched to OpenEdge View, for a limited amount of time you will have the option to switch back to the legacy Merchant Portal to help in your transition. You can always come back to OpenEdge View during this time.

1. Log into OpenEdge View.
2. Select your username, then select the "Switch Back to Merchant Portal" option.
3. In the following window, select the appropriate button to continue.
    a. Select "Provide Feedback" to fill out a short form with any suggestions to make our application better.
    b. Select "Switch to Merchant Portal" to continue without providing feedback.
    c. Select Cancel to close the window and return to OpenEdge View.





MY USER PROFILE

After your OpenEdge View account has been created, OpenEdge View provides functions for changing your contact information and account password.

Modifying Your Contact Information

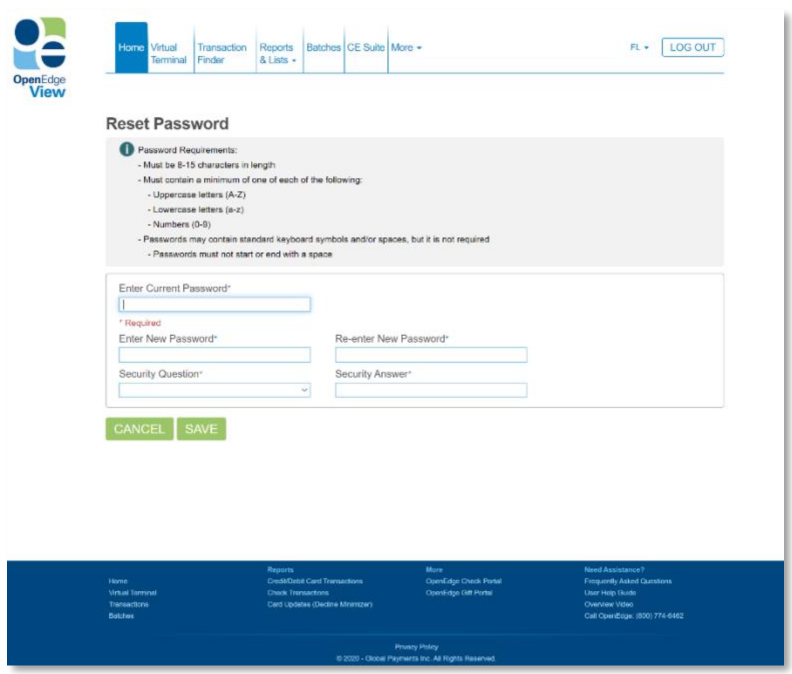
1. Log into OpenEdge View. Select your username, then select the **My User Profile** button.
2. Select the **EDIT** button.
3. Modify any desired information, such as **First Name**, **Last Name**, **Address**, **City**, **State**, **Zip Code**, **Phone** number, or **Email** address.
4. Select the **SAVE** button.

Note: Modifying the Email address, also changes the username to match the new Email address.

Changing Your Password

Your password can be changed using the **Forgot Password** link directly on the OpenEdge View login page. It may also be changed after logging into OpenEdge View on the **My User Profile** page.

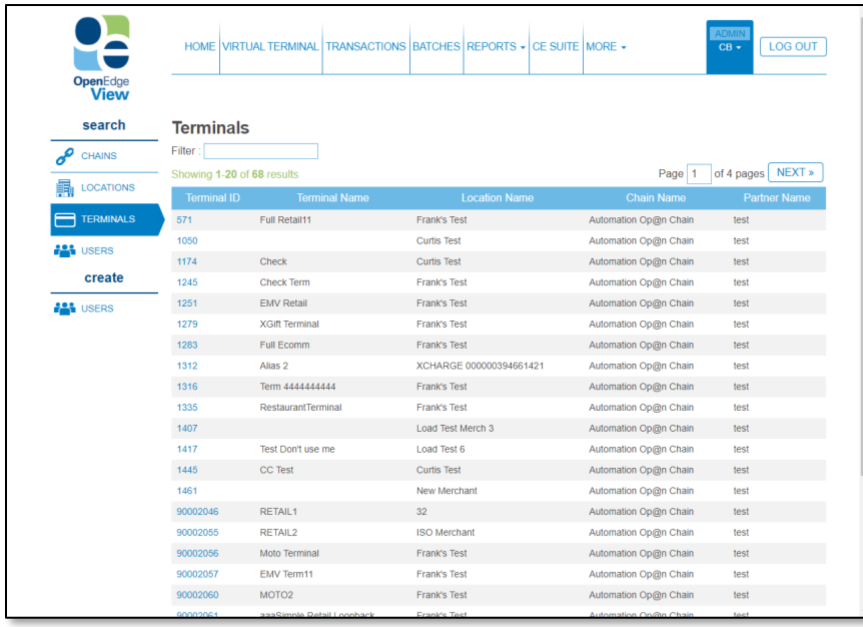
1. Log into OpenEdge View. Select your username, then select the **My User Profile** button.
2. Select the **EDIT** button.
3. Select the **CHANGE PASSWORD** button.
    a. When changing your password, you will need to enter your previous password into the **Current Password** field. Enter the new password into both **New Password** and **Re-enter New Password** fields. Choose a **Security Question**, and enter a **Security Answer**.
    b. See the information in the OpenEdge View Password Policy section for password requirements.
4. Select the **SAVE** button



OPENEDGE VIEW ADMINISTRATION PANEL

Users with a role of **Merchant Manager** have the ability to access the Administration Panel.

Managing Terminals

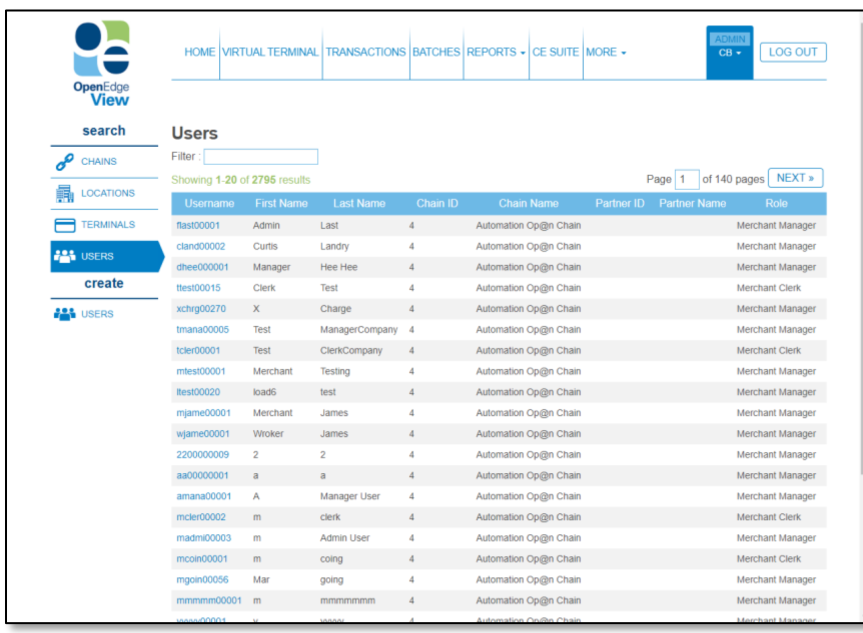


Searching a Terminal

1. Log into OpenEdge View and open the **Administration Panel**.
2. Under the **search** column, select **TERMINALS**.
3. All available Terminals display.
4. The displayed Terminals can be exported using the **CSV** and **Excel** buttons at the bottom of the page.

Edit a Terminal

1. Log into OpenEdge View and open the **Administration Panel**.
2. Under the **search** column, select **TERMINALS**.
3. All available Terminals are displayed. Select the desired **Terminal Name**.
4. On the **Terminal** or **Rules** tab, select the **EDIT** button.
5. Fields may be edited, as desired.
6. Select the **SAVE** button.



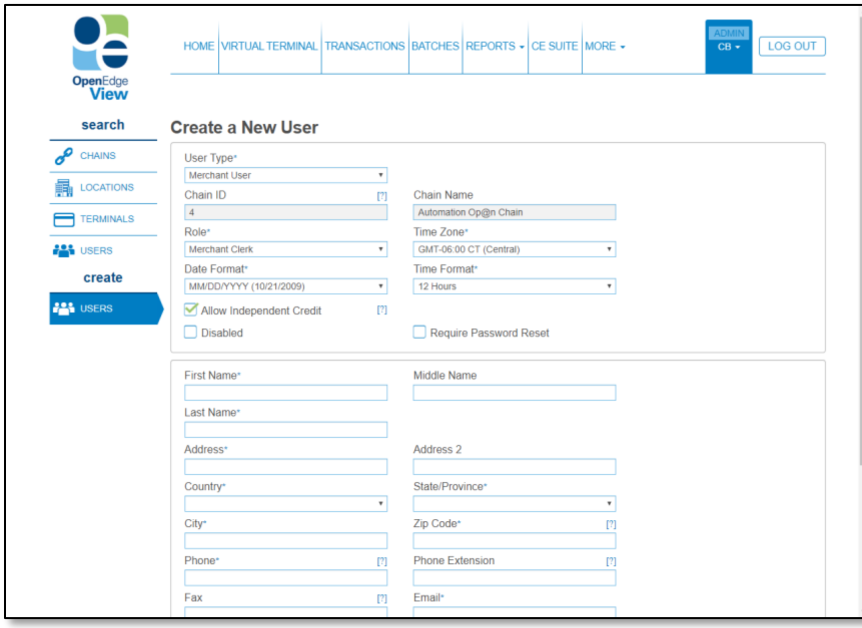
Managing Users

Search a User

1. Log into OpenEdge View and open the **Administration Panel**.
2. Under the **search** column, select **USERS**.
3. All available Users display.
4. The displayed Users can be exported using the **CSV** and **Excel** buttons at the bottom of the page.

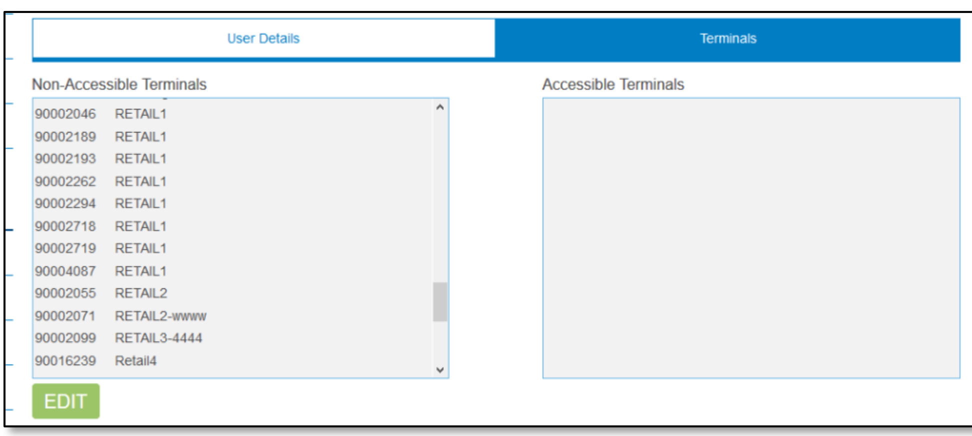
Managing Users (Continued)

Create a New User



1. Log into OpenEdge View. Select your username, then select the **Administration Panel** button.
2. Under the **create** column, select **USERS**.
3. Choose the **Role** for this User. See User Roles section for options.
4. Select the **Time Zone**, **Date Format**, and **Time Format** for this User.
5. Choose the **Enabled** and **Locked** box if desired.
6. Enter the **First Name, Last Name, Country, and Email address** for this User.
7. If desired, enter the **Middle Name**, **Address**, **City**, **State/Province**, **Country**, **Zip Code**, **Phone** number, **Phone Extension**, and **Fax Number**.
8. Select the **CREATE** button.

9. Once the User is created, you will be prompted to select the terminals that you would like to grant or deny the user access to.
10. Highlight the desired terminals by clicking on them, and then use the arrows shown in the middle column, to move the terminals between the two sections, **Denied Terminals** or **Granted Terminals**.

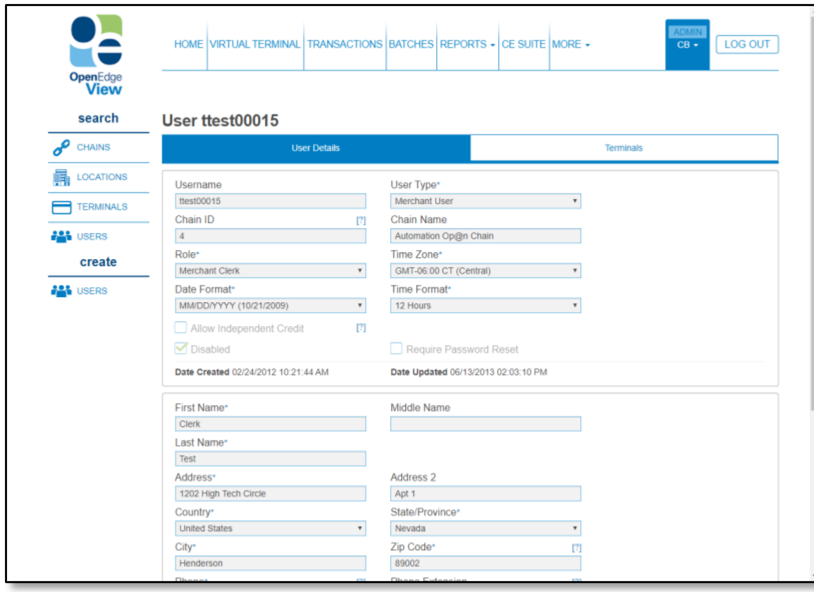


11. You can use the **double arrows** in the middle column to move **all** terminals to the opposite section.
12. Terminals placed in the **Granted Terminals** section will be visible to the user, and terminals placed in the **Denied Terminals** section will not be.

Managing Users (Continued)

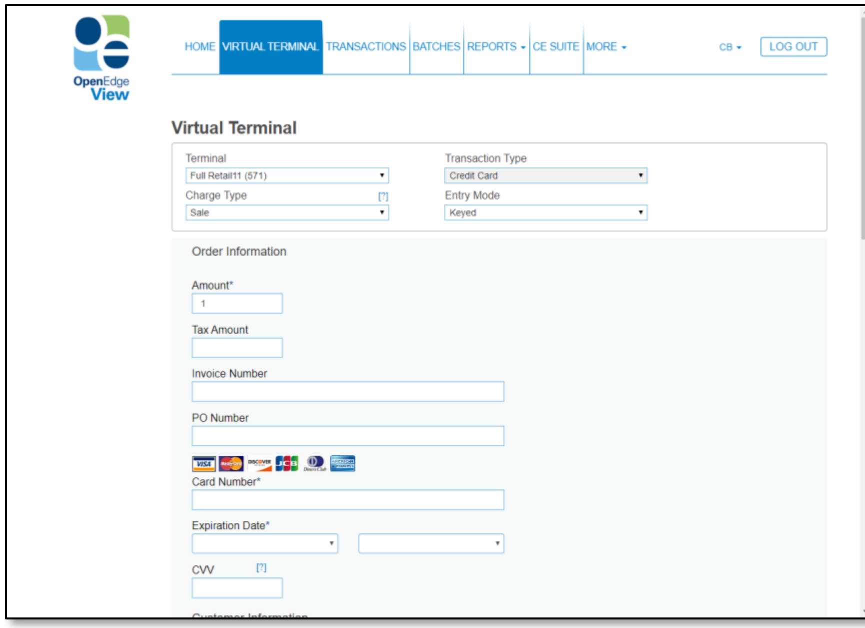
Edit a User

1. Log into OpenEdge View and open the **Administration Panel**.
2. Under the **search** column, select **USERS**.
3. All available Users display.
4. Select the desired **User**.
5. On the **User Details** or **Terminals** tab, select the **EDIT** button.
6. Fields may be edited, as desired.
7. Select the **SAVE** button.



VIRTUAL TERMINAL

The Virtual Terminal provides users with the ability to process transactions directly in OpenEdge View.



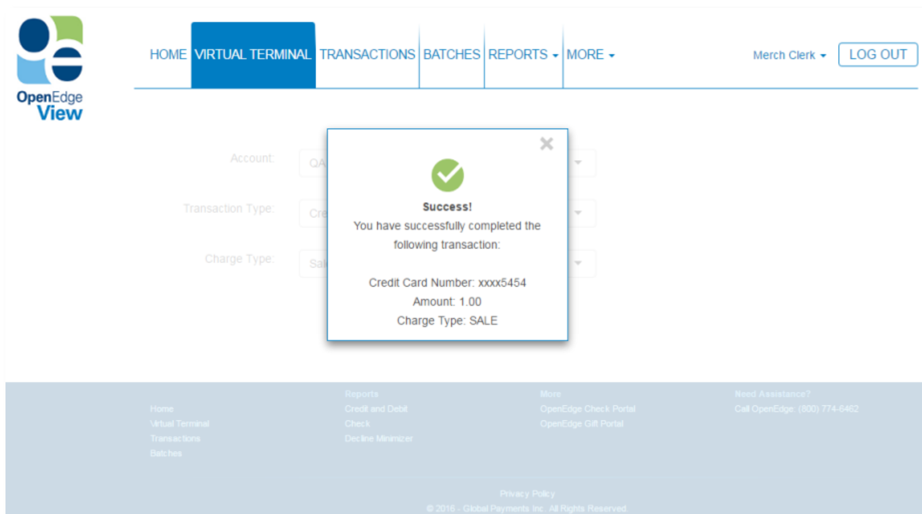
Processing Transactions

1. Log into OpenEdge View and select the **VIRTUAL TERMINAL** tab.
2. Select the Terminal where the transaction will be processed.
3. Select the **Transaction Type**.
4. Select a **Charge Type**.

Credit Card Charge Types

a. **Sale**: Used to purchase goods and services. When a sale occurs, the cardholder's credit limit is check to see if the funds are available. If the funds are available, the transaction is flagged for inclusion in the settlement batch.

b. **Auth**: Used to check if the cardholder funds are sufficient for the purchase amount, and if so, will reserve the amount for a period of time. A capture on this transaction will flag the transaction for settlement.

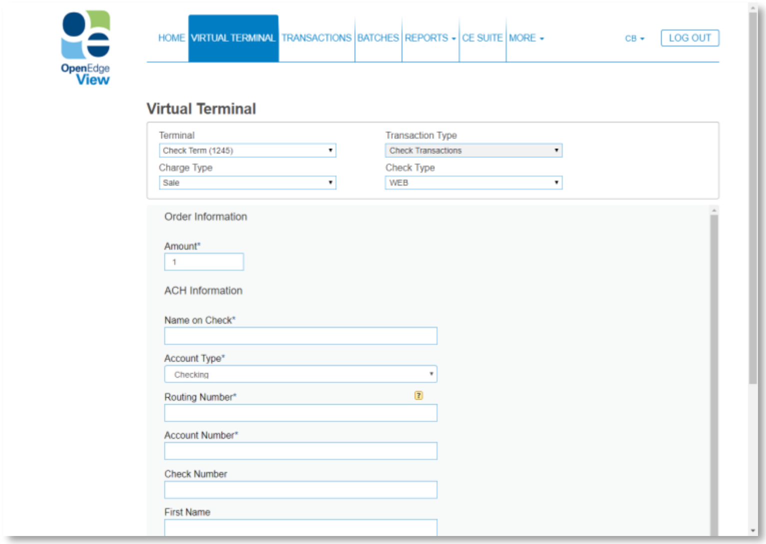


c. **Refund**: This transaction type is an independent credit.

d. **Offline Capture:** Uses the Approval Code to capture the funds from a previous Offline Authorization.

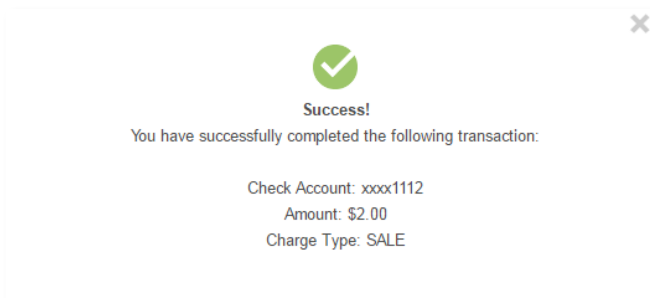
Check Charge Types

Supported check types are: WEB, TEL, PPD, CCD.



a. **Sale**: Used to purchase goods and services. When a sale occurs, the cardholder's credit

b. **Credit**: Used to return funds to a specified account.



c. **Void:** Used to remove a check transaction before it has cleared. To easily process a Void, follow these instructions:
   a. Select the check transaction you would like to void using the transaction search feature.
   b. Click the "Void" button.
   c. A pop in window displays similar to the Virtual Terminal window.
   d. Click on "Submit".

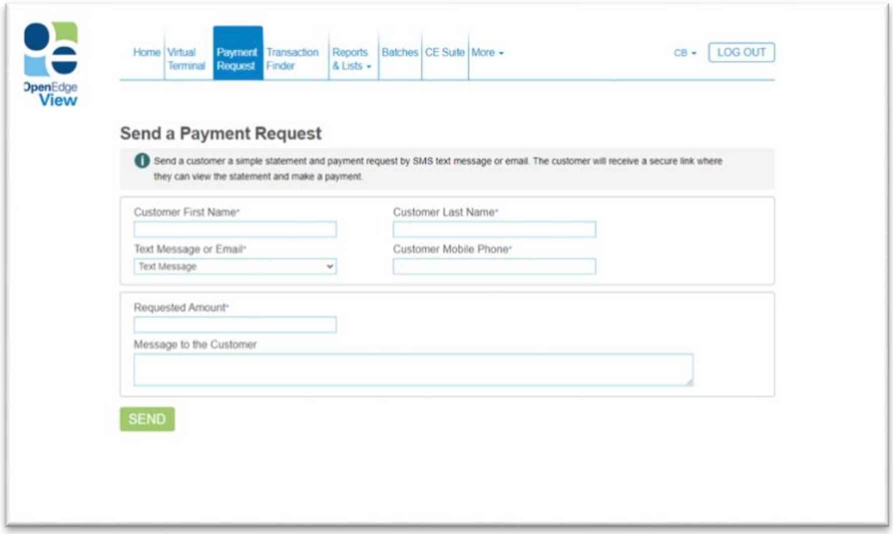
Supported Hardware

You can use several different PIN pads and swipers on the Virtual Terminal.

1. Idtech MSR CLR (KBE)
2. Magtek Ipad (KBE)
3. Magtek Dynamag (KBE)
4. Magtek Bullet (kbe)

PAYMENT REQUEST

Send a customer a simple statement and payment request by SMS text message or email. The customer will receive a secure link where they can view the statement and make a payment.



Sending a payment request

1. Log into OpenEdge View and select the **Payment Request** tab.
2. Choose a delivery method by opening the **Text Message or Email** dropdown and selecting the desired option.
3. Fill out the **Customer** and **Payment Request** details.
4. Click **SEND**.

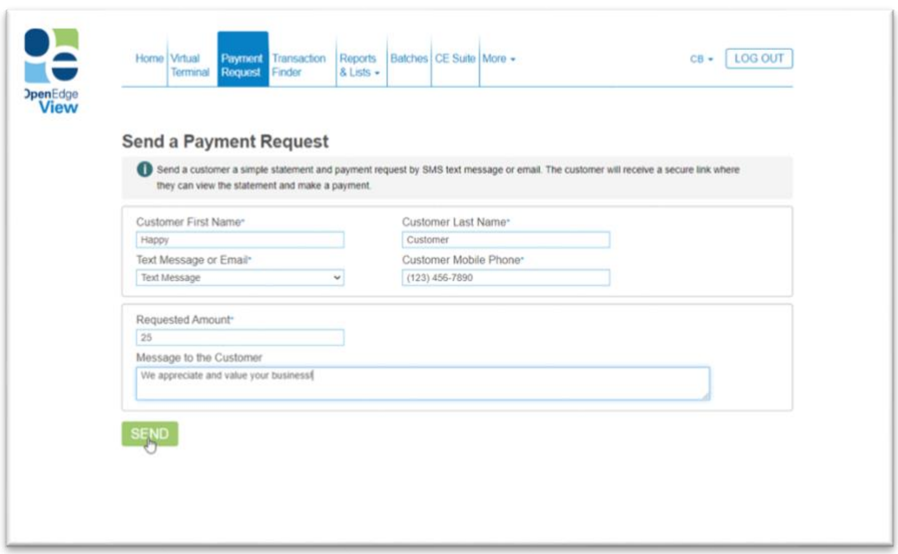
Customer and Payment Request Details

a. **Customer First Name & Customer Last Name**: Customer first name and last name are used to assist with payment reconciliation.

b. **Text Message or Email**: Use Text Message or Email where your customer will receive a secure link where they can view the statement and pay the requested amount.

c. **Requested Amount**: This should reflect the total amount requested from the customer.

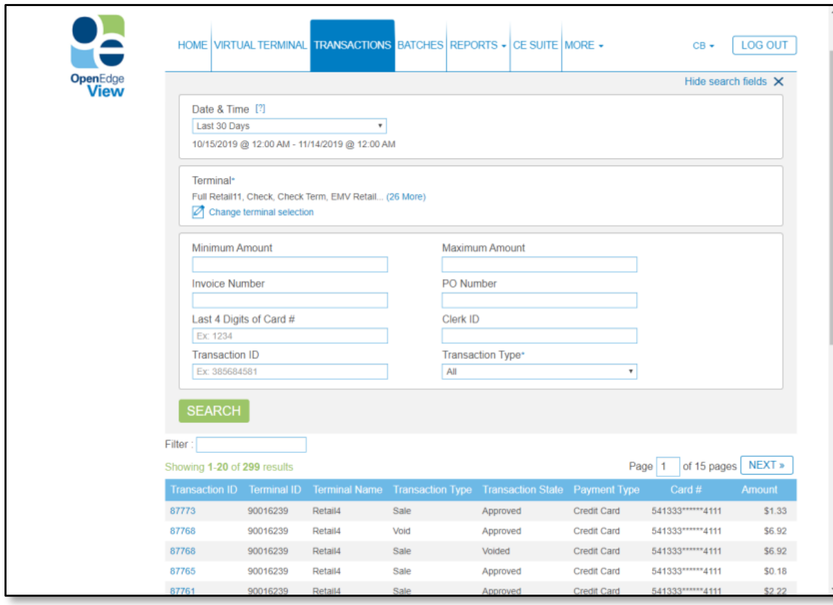
d. **Message to the Customer:** Include any message to your customer up to 255 characters that will be displayed in the statement with the requested amount.



TRANSACTIONS

OpenEdge View provides reporting tools to view processed transactions.

Search Transactions



1. Log into OpenEdge View.
2. Select the **TRANSACTIONS** tab.
3. Choose the **Date & Time** of the transactions you would like to view.
4. Under the **Terminal** section, press the **SELECT** button. Choose any desired Terminals and select the **SAVE SELECTION** button.
5. Additional search information may be entered as desired, such as **Transaction ID**, **Amount**, etc.
6. Select the **SEARCH** button.
7. Matching transactions display.

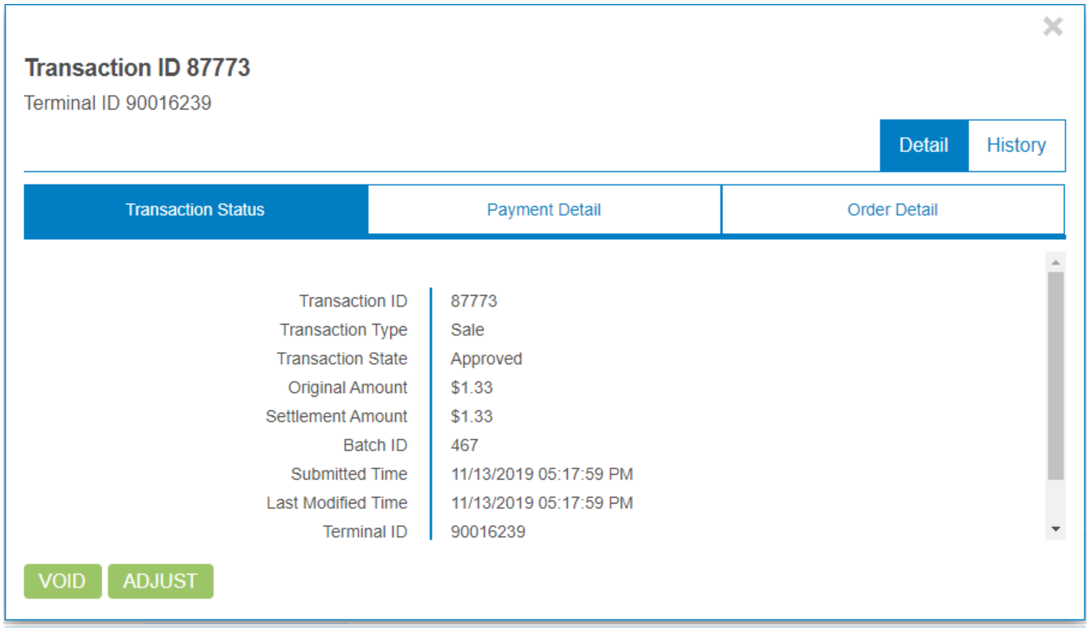
Note: Search results can be sorted by clicking on the title of each column.

Transaction Detail Page

The Transaction Detail page contains three different tabs: Transaction Status, Payment Detail, and Order Detail. Please see below for more information on each.

Transaction Status

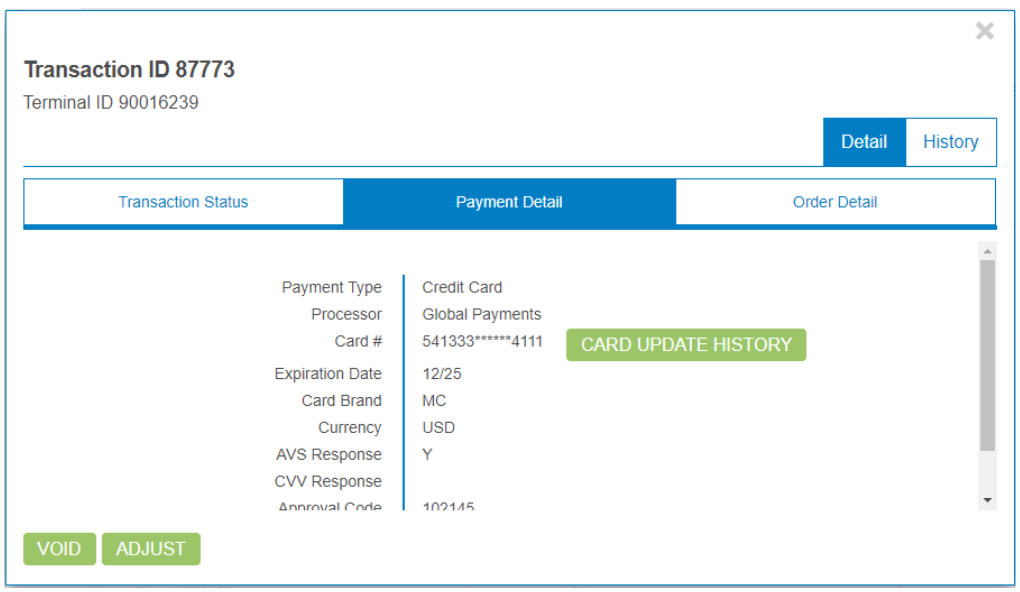
Transaction Status informs the user of the current state of the transaction, the Settlement Amount, the Batch ID that coincides with the transaction, etc. See the screen shot provided for more details.



Transaction Detail Page (Continued)

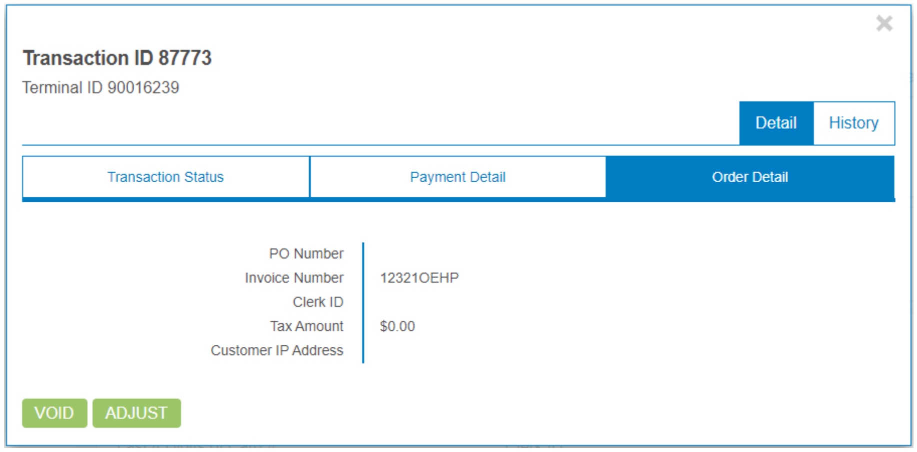
Payment Detail

Payment Detail page provides information on the payment such as: Processor, Card Number, Card Expiration Date, etc. See the screenshot provided for more details.



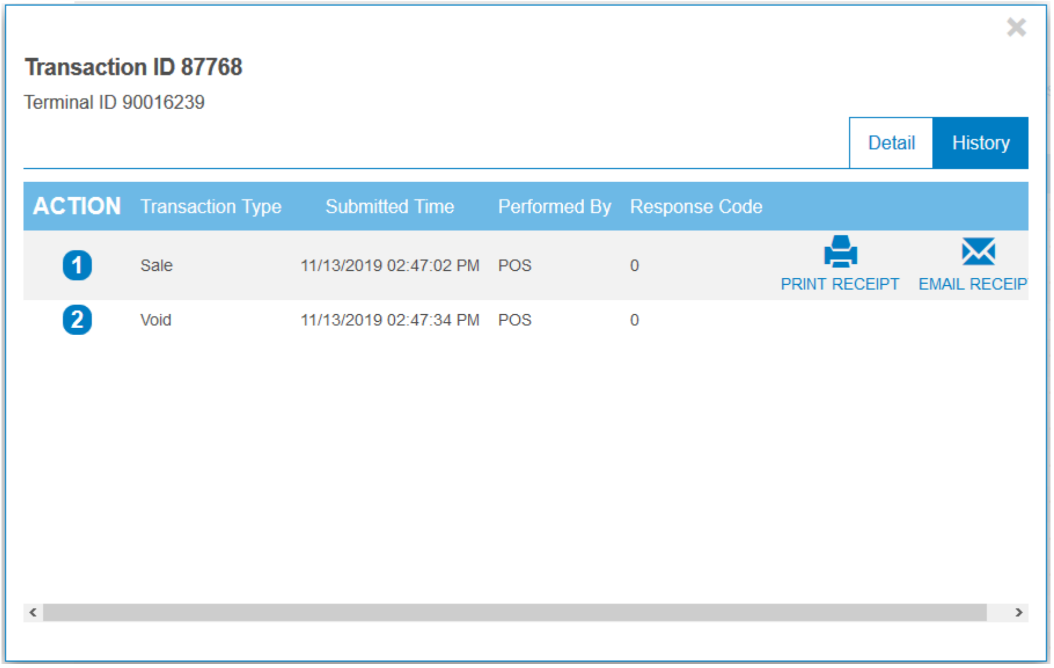
Order Detail

The Order Detail page provides information on the order such as the Purchase Order Number, Invoice Number, and Clerk ID. See the screenshot provided for more details.



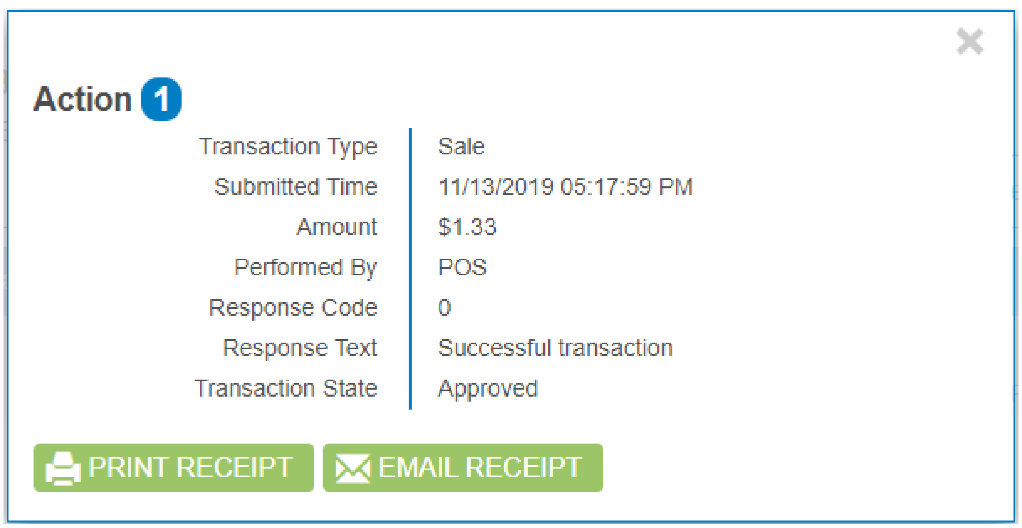
Transaction History Page

The **History** tab displays the original and any follow-on transactions.



Action Button

You can also click on the Action Number to view more information on the transaction.



Processing follow on Transactions

Transactions listed in the Transactions report may have the ability to have a follow on transaction to be processed. Some examples of follow on transactions include **VOID, REFUND**, and **ADJUSTMENT**.

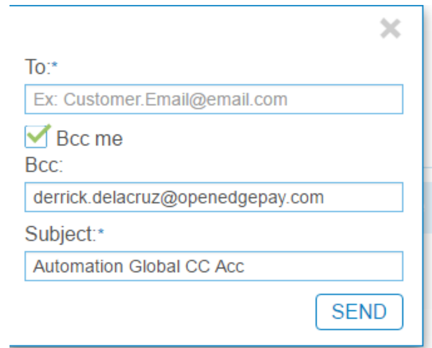
1. After logging into OpenEdge View, select the **TRANSACTIONS** tab.
2. Choose the **Date & Time** of the transactions you would like to view.
3. Under the **Terminal** section, press the **SELECT** button. Choose any desired Terminals and select the **SAVE SELECTION** button.
4. Additional search information may be entered as desired, such as **Transaction ID**, **Amount**, etc.
5. Select the **SEARCH** button.
6. Select a **Transaction ID**.
7. If applicable, buttons will display in the bottom-left corner of the window for the available follow on transactions. Not all Transaction IDs will have the option to process a follow on transaction.
    - Possible follow-on transactions for Sales: VOID, ADJUSTMENT, RETURN
    - Possible follow-on transactions for Auths: CAPTURE, VOID, ADJUSTMENT
    - Possible follow-on transactions for Captures: VOID, ADJUSTMENT
    - Possible follow-on transactions for Refunds: VOID

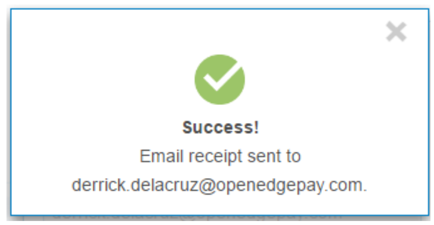
Viewing Card Update History

1. After logging into OpenEdge View, select the **TRANSACTIONS** tab.
2. Choose the **Date & Time** of the transactions you would like to view.
3. Under the **Terminal** section, press the **SELECT** button. Choose any desired Terminals and select the **SAVE SELECTION** button.
4. Additional search information may be entered as desired, such as **Transaction ID**, **Amount**, etc.
5. Select the **SEARCH** button.
6. Select a **Transaction ID**.
7. Select the **Payment Detail** tab.
8. Select the **CARD UPDATE HISTORY** button.
9. The card history displays.

Print or Email Receipt

1. After logging into OpenEdge View, select the **TRANSACTIONS** tab.
2. Choose the **Date & Time** of the transactions you would like to view.
3. Under the **Terminal** section, press the **SELECT** button. Choose any desired Terminals and select the **SAVE SELECTION** button.
4. Additional search information may be entered as desired, such as **Transaction ID**, **Amount**, etc.
5. Select the **SEARCH** button.
6. Select a **Transaction ID**.
7. Select the **History** tab.
8. Select the **PRINT RECEIPT** or **EMAIL RECEIPT** button on the desired action line.
    - **PRINT RECEIPT** displays a copy of the receipt. Select the **PRINT** button to print a copy.
    - **EMAIL RECEIPT** sends the receipt to the email chosen in the pop up window that appears when selecting this option.
        i. After filling out the required fields, click **SEND.**
        ii. A success message appears.



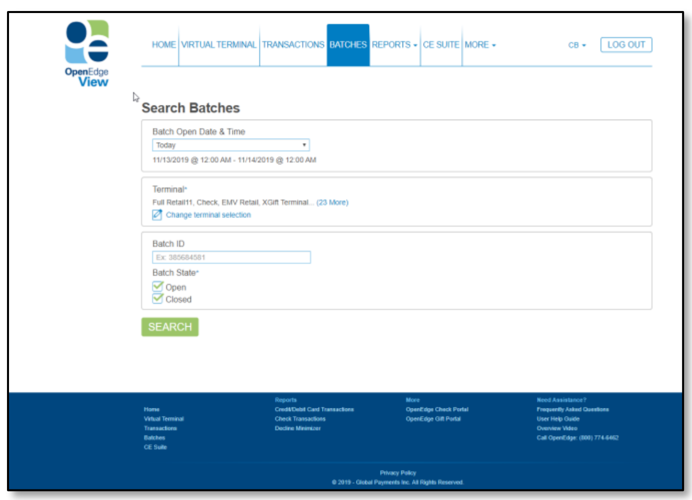


BATCHES

OpenEdge View provides reporting tools to view batches.

Search Batches

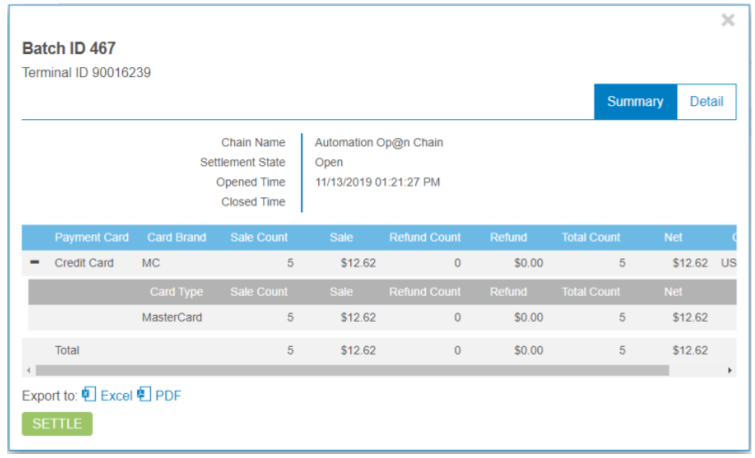
1. Log into OpenEdge View.
2. Select the **BATCHES** tab.
3. Choose the **Date & Time** of the batches you would like to view.
4. Under the **Terminal** section, press the **SELECT** button. Choose any desired Terminals and select the **SAVE SELECTION** button.
5. Choose the **Batch State**.
    a. **OPEN** batches have not been settled.
    b. **CLOSED** batches have been settled.
6. The **Batch ID** may also be optionally entered.
7. Select the **SEARCH** button.
8. Matching batches display. For further details on the batch, select the **Batch ID**.
9. The report can be exported using the **CSV**, **Excel**, **PDF**, and **HTML** buttons at the bottom of the page.



Search Batches (Continued)

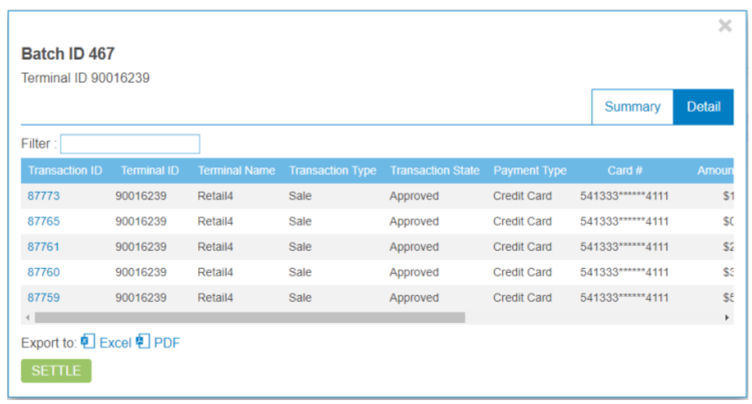
Batch Summary Example

The **Summary** tab displays the total amount processed. The report table can be exported using the **Excel** or **PDF** buttons at the bottom of the window.



Batch Detail Example

The **Detail** tab displays each Transaction ID included in the batch. The report table can be exported using the **Excel** or **PDF** buttons at the bottom of the window.

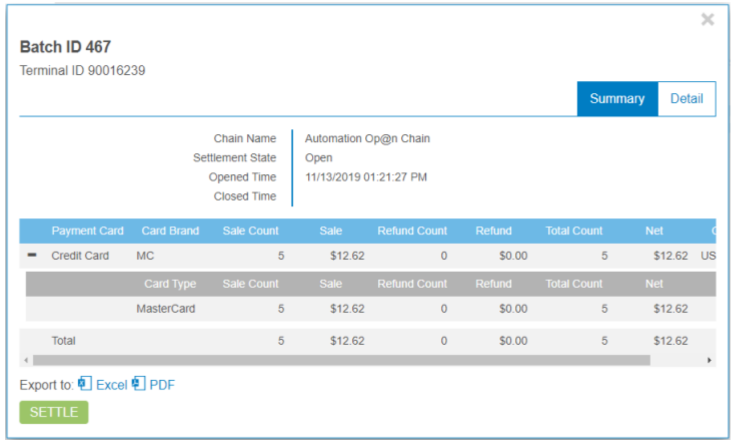


Manually Settle Batch

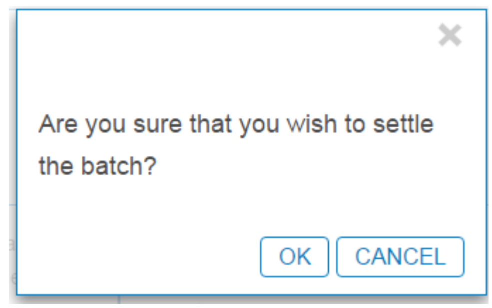
Your open batch may be closed manually through OpenEdge View if you do not choose to utilize automatic batch closing, or if you would like to close before your automatic batch close time.

1. To manually close your open batch, first open your current Batch Summary report.

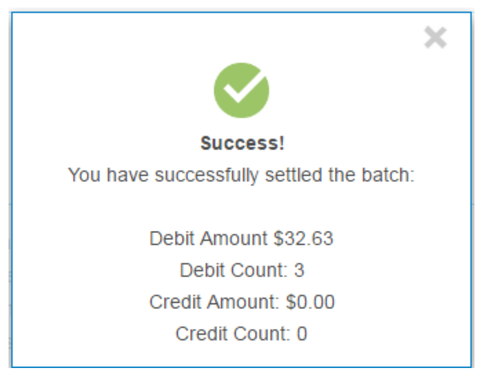
2. On your Batch Summary report, locate the **SETTLE** button at the bottom left corner of the window and click it. If you cannot locate the **SETTLE** button, the batch has already been closed.



3. A new window will appear saying “Are you sure that you wish to settle the batch?” with two buttons saying **OK** and **CANCEL.** Click **OK**.



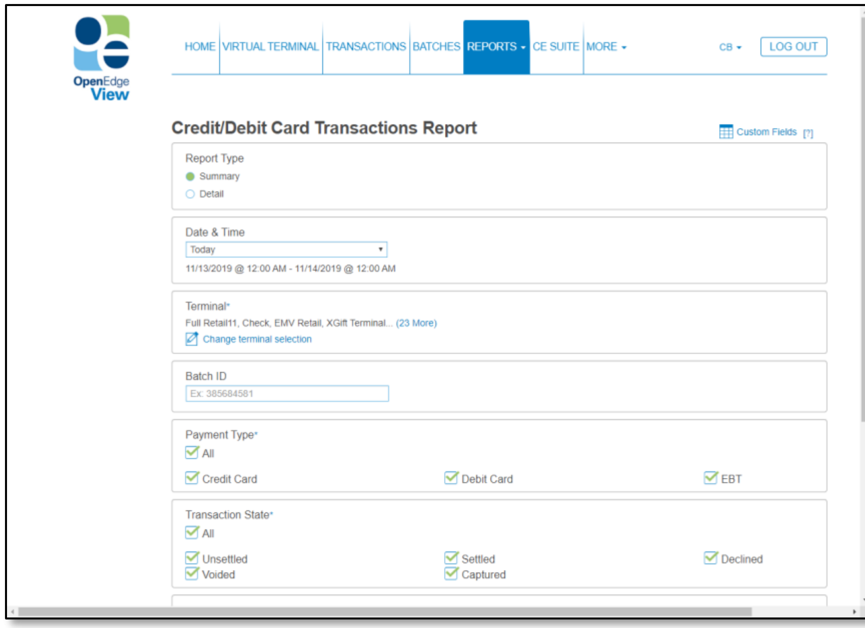
4. Your batch is closed, and a success message is displayed.



REPORTS

OpenEdge View provides reporting tools for users.

Credit and Debit

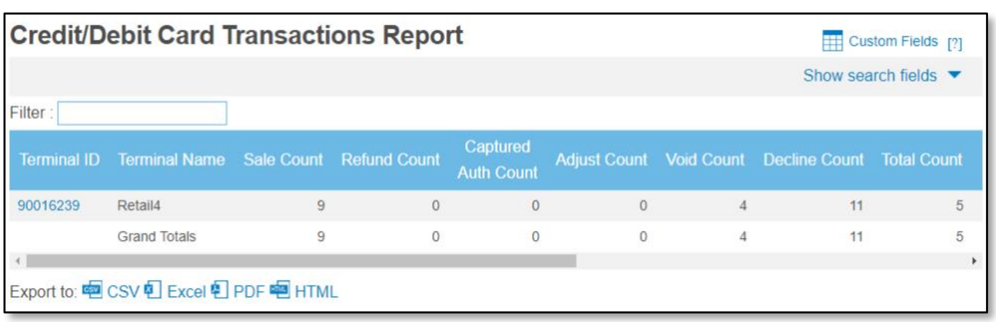


This report includes information on Credit and Debit transactions that have been processed.

1. Log into OpenEdge View.
2. Select the **REPORTS** tab and the **Credit and Debit** option.
3. Choose the **Report Type**.
    a. **Summary** returns totals for each selected Terminal.
    b. **Detail** displays all transactions processed on the selected Terminals.
4. Choose the **Date & Time** of the transactions you would like to view.
5. Under the **Terminal** section, press the **SELECT** button. Choose any desired Terminals and select the **SAVE SELECTION** button.
6. Select the Payment Type, Transaction State and Card Brand. Optionally, the **Batch ID** may also be entered.
7. Select the **GENERATE REPORT** button.
8. The report displays.
9. The report can be exported using the **CSV**, **Excel**, **PDF**, and **HTML** buttons at the bottom of the page.

Summary Report Example

Summary returns total transaction dollar and transaction counts for each selected Terminal.

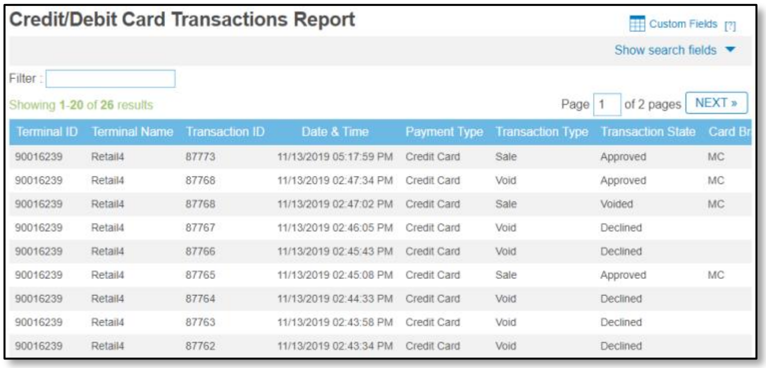


Terminal ID	Terminal Name	Sale Count	Refund Count	Captured Auth Count	Adjust Count	Void Count	Decline Count	Total Count
90016239	Retail4	9	0	0	0	4	11	5
	Grand Totals	9	0	0	0	4	11	5

Credit and Debit (Continued)

Detail Report Example

Detail displays all transactions processed on the selected Terminals.

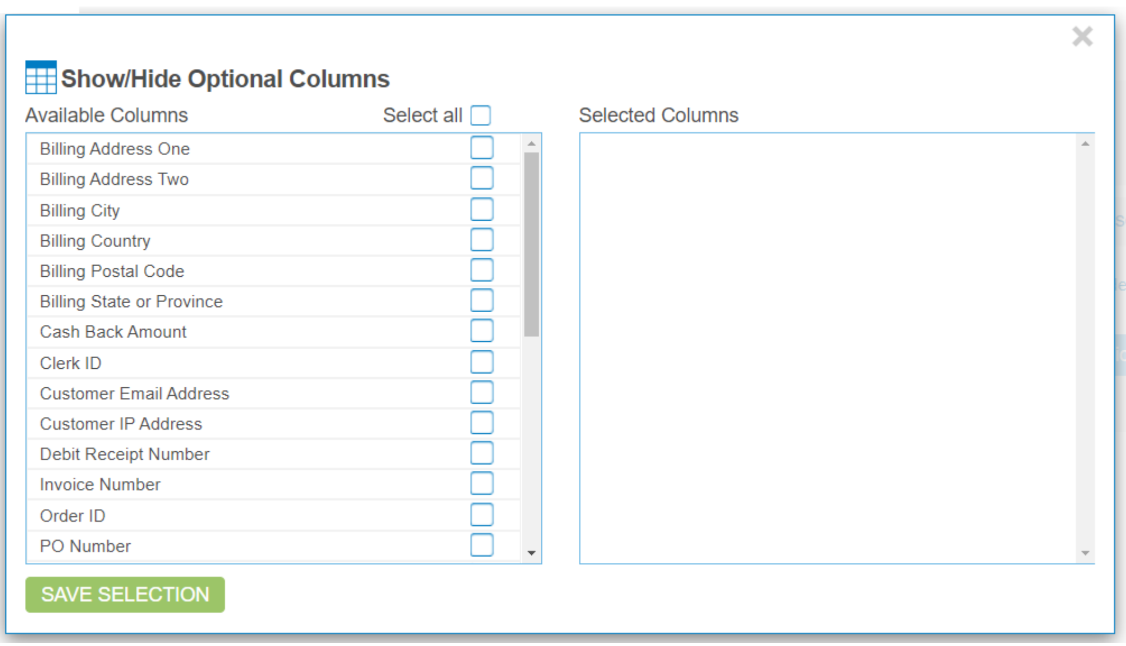


Terminal ID	Terminal Name	Transaction ID	Date & Time	Payment Type	Transaction Type	Transaction State	Card Br
90016239	Retail4	87773	11/13/2019 05:17:59 PM	Credit Card	Sale	Approved	MC
90016239	Retail4	87768	11/13/2019 02:47:34 PM	Credit Card	Void	Approved	MC
90016239	Retail4	87768	11/13/2019 02:47:02 PM	Credit Card	Sale	Voided	MC
90016239	Retail4	87767	11/13/2019 02:46:05 PM	Credit Card	Void	Declined	
90016239	Retail4	87766	11/13/2019 02:45:43 PM	Credit Card	Void	Declined	
90016239	Retail4	87765	11/13/2019 02:45:08 PM	Credit Card	Sale	Approved	MC
90016239	Retail4	87764	11/13/2019 02:44:33 PM	Credit Card	Void	Declined	
90016239	Retail4	87763	11/13/2019 02:43:58 PM	Credit Card	Void	Declined	
90016239	Retail4	87762	11/13/2019 02:43:34 PM	Credit Card	Void	Declined	

Custom Fields

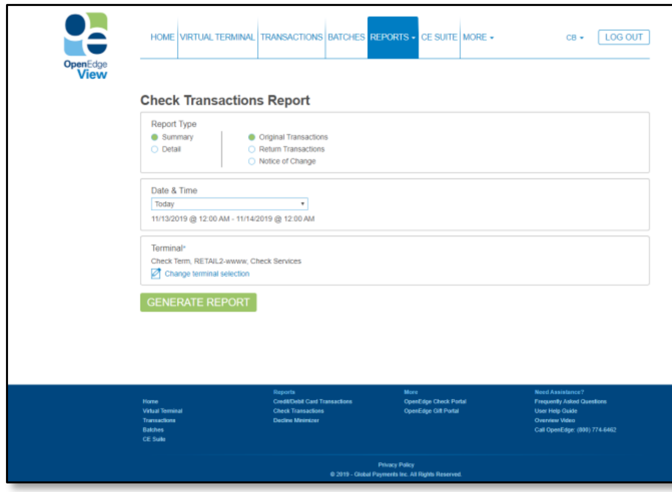
The OpenEdge View Reports offers the ability to customize which fields display on the reports. The Custom Fields do not apply when exporting the report to a PDF, and only the default columns will display.

1. From within the **Credit and Debit Transaction Report**, select the **Custom Fields** button.
2. Desired columns may be added or removed from the report.
3. Select the **SAVE SELECTION** button.



Check

This report includes information on Check transactions that have been processed.



1. Log into OpenEdge View.
2. Select the **REPORTS** tab and the **Check** option.
3. Choose the **Report Type**.
    a. **Summary** returns totals for each selected Terminal.
    b. **Detail** displays all transactions processed on the selected Terminals.
    c. **Original Transactions** displays all original transactions.
    d. **Return Transactions** displays all check transactions that have been returned.
    e. **Notice of Change** displays a report of accounts that have been changed.
4. Choose the **Date & Time** of the transactions you would like to view.
5. Under the **Terminal** section, press the **SELECT** button. Choose any desired Terminals and select the **SAVE SELECTION** button.
6. Select the **GENERATE REPORT** button.
7. The report displays.
8. The report can be exported using the **CSV**, **Excel**, **PDF**, and **HTML** buttons at the bottom of the page.

Summary Report Example

Summary returns totals for each selected Terminal.

Check Transactions Report

Show search fields

Filter :

Terminal ID	Terminal Name	Sale Count	Sale Total	Refund Count	Refund Total
90002322	Check Services	3098	$509,128.47	1693	$519,773.14
1245	Check Term	34	$63.33	0	$0.00
	Grand Totals	3132	$509,191.80	1693	$519,773.14

Export to: CSV Excel PDF HTML

Detail Report Example

Detail displays all transactions processed on the selected Terminals.

Check Transactions Report

Show search fields

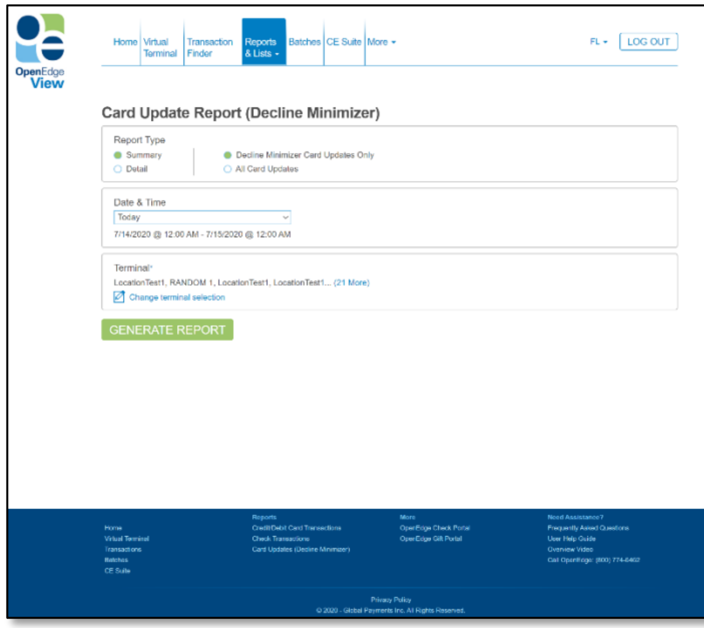
Filter :

Showing 1-20 of 4825 results

Page 1 of 242 pages NEXT »

Terminal ID	Terminal Name	Transaction ID	Check Number	Client ID	Transaction Type	Transaction State	Amount	
1245	Check Term	20951	8614542517	9900002781	Sale	In Progress	$0.53	0[illegible]
1245	Check Term	20952	8614542517	9900002781	Sale	In Progress	$6.30	0[illegible]
1245	Check Term	20953	8614542517	9900002781	Sale	In Progress	$5.77	0[illegible]
1245	Check Term	21014	8614542517	9900002781	Sale	In Progress	$6.73	0[illegible]
1245	Check Term	21015	8614542517	9900002781	Sale	In Progress	$4.32	0[illegible]
1245	Check Term	21016	0713	9900002781	Sale	In Progress	$2.22	0[illegible]
1245	Check Term	21017	000912	9900002781	Sale	Unknown	$2.22	0[illegible]
1245	Check Term	21018		9900002781	Sale	Unknown		0[illegible]

Card Updates (Decline Minimizer)

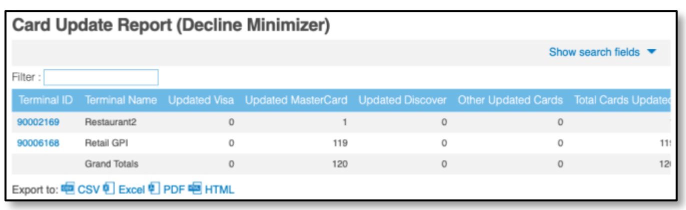


This report includes information on accounts that have been updated either by the user or by the Decline Minimizer service.

1. Log into OpenEdge View.
2. Select the **REPORTS** tab and the **Card Update Report (Decline Minimizer)** option.
3. Choose the **Report Type**.
    a. **Summary** returns totals of cards updated for each selected Terminal.
    b. **Detail** displays specific updates on the selected Terminals.
4. Choose the **Date & Time** for the report.
5. Under the **Terminal** section, press the **SELECT** button. Choose any desired Terminals and select the **SAVE SELECTION** button.
6. Select the **GENERATE REPORT** button.
7. The report displays.
8. The report can be exported using the **CSV**, **Excel**, **PDF**, and **HTML** buttons at the bottom of the page.

Summary Report Example

Summary returns totals for each selected Terminal.



Card Update Report (Decline Minimizer)

Show search fields

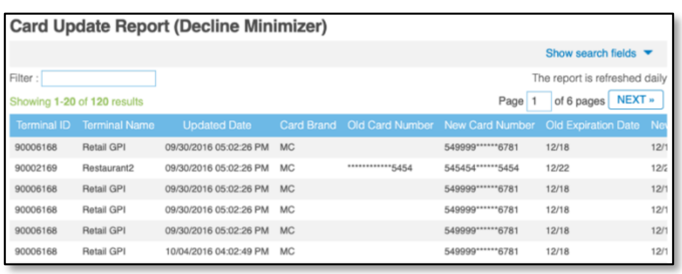
Filter :

Terminal ID	Terminal Name	Updated Visa	Updated MasterCard	Updated Discover	Other Updated Cards	Total Cards Update
90002169	Restaurant2	0	1	0	0	
90006168	Retail GPI	0	119	0	0	11
	Grand Totals	0	120	0	0	12

Export to: CSV Excel PDF HTML

Detail Report Example

Detail displays all transactions processed on the selected Terminals.



Card Update Report (Decline Minimizer)

Show search fields

Filter :

The report is refreshed daily

Showing 1-20 of 120 results

Page 1 of 6 pages NEXT »

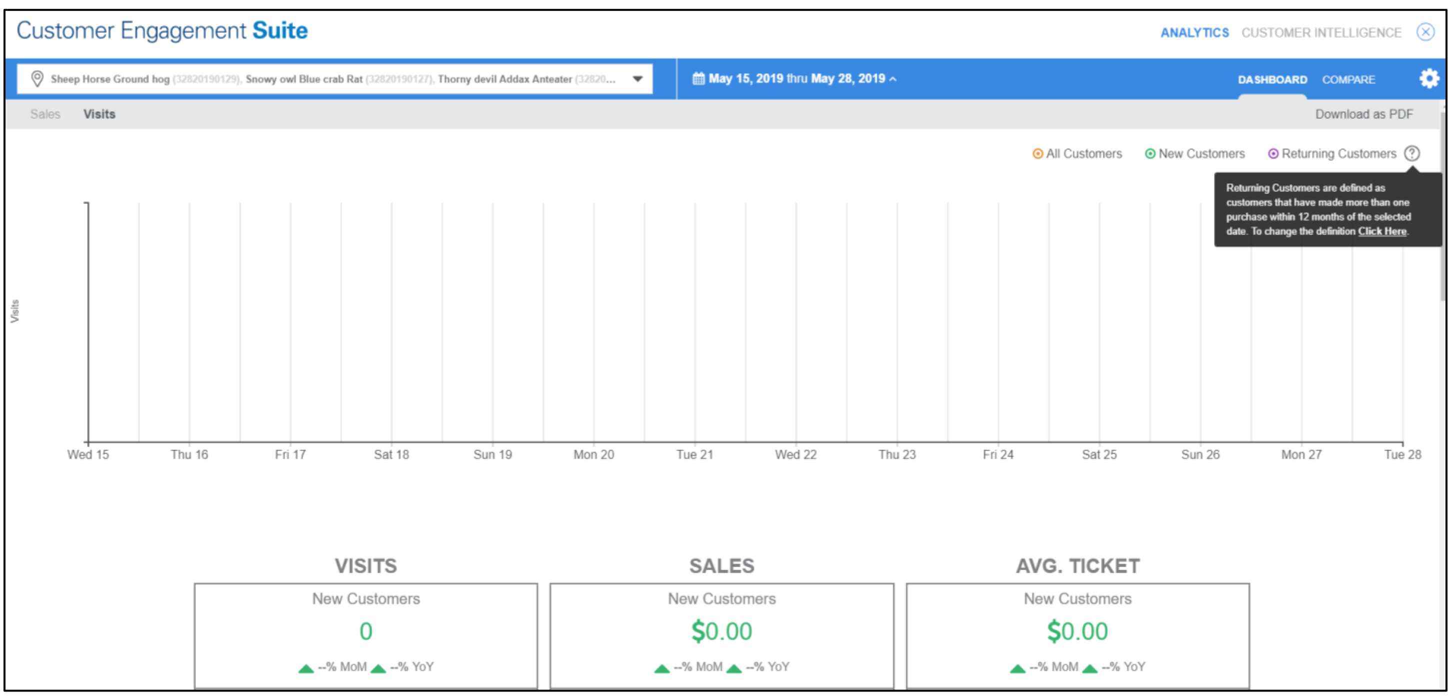
Terminal ID	Terminal Name	Updated Date	Card Brand	Old Card Number	New Card Number	Old Expiration Date	Ne
90006168	Retail GPI	09/30/2016 05:02:26 PM	MC		549999******6781	12/18	12/1
90002169	Restaurant2	09/30/2016 05:02:26 PM	MC	************5454	545454******5454	12/22	12/2
90006168	Retail GPI	09/30/2016 05:02:26 PM	MC		549999******6781	12/18	12/1
90006168	Retail GPI	09/30/2016 05:02:26 PM	MC		549999******6781	12/18	12/1
90006168	Retail GPI	09/30/2016 05:02:26 PM	MC		549999******6781	12/18	12/1
90006168	Retail GPI	10/04/2016 04:02:49 PM	MC		549999******6781	12/18	12/1

CUSTOMER ENGAGEMENT SUITE

The Customer Engagement Suite offers merchants valuable data regarding commercial analytics, customer demographics, and social reputation. From the main menu, click **CE Suite** to view the Customer Engagement Suite. View the official [Customer Engagement Suite website] for more information.

Analytics

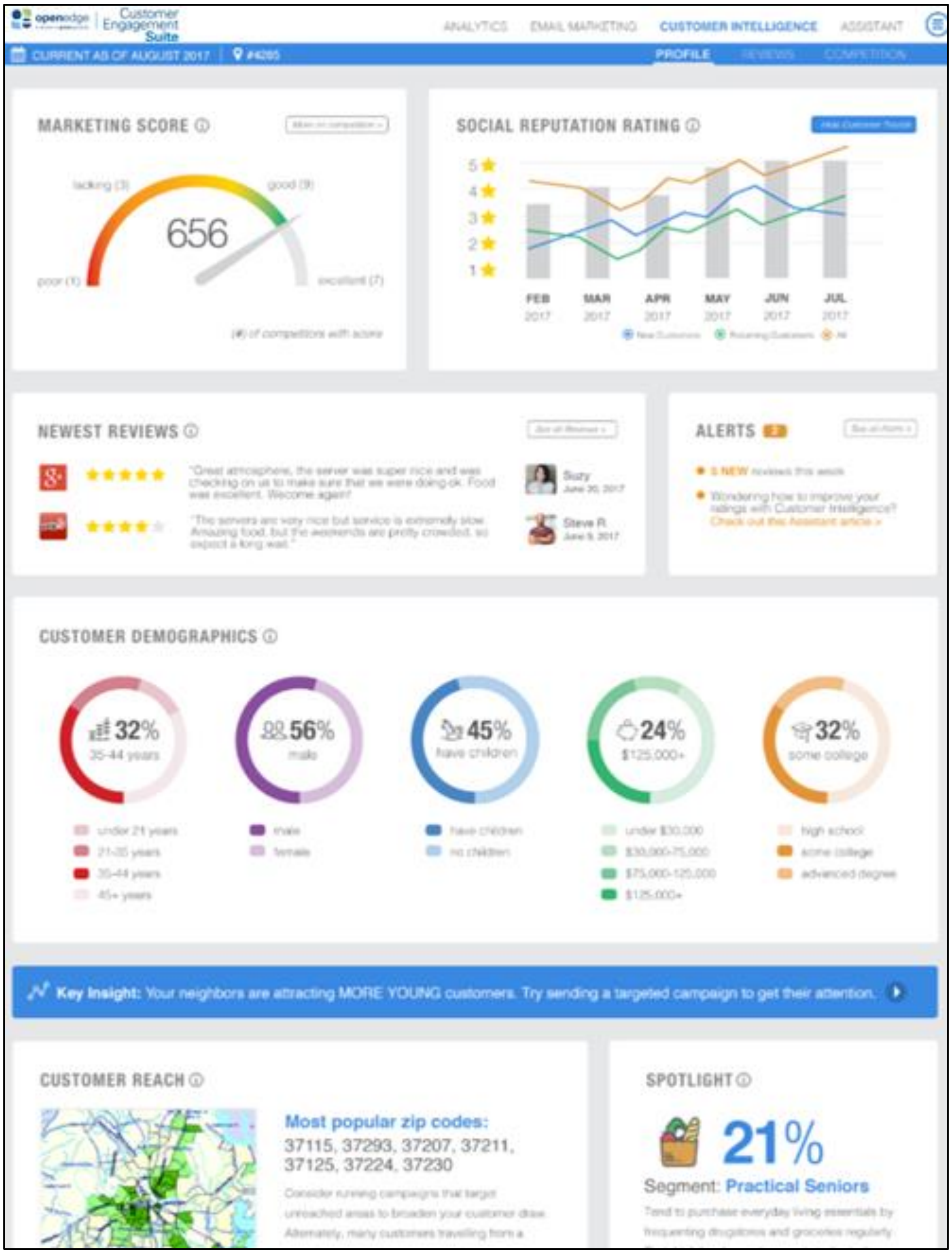
Within the Customer Engagement Suite, OpenEdge View merchants first see their Analytics dashboard, with easily consumable sales and transaction statistics. For merchants with multiple locations, the dropdown on the top-left corner can be used to filter the data by single, multiple, or all locations.



Customer Intelligence

From the **Analytics** dashboard, merchants can navigate to the **Customer Intelligence** page by clicking in the upper right. This page contains valuable Social Reputation information, including data related to social media, marketing content, reviews, and customer demographics.

Note that the content of this page may be modified or removed for some merchants bound by HIPAA regulations.



USER ROLES

The following table visually describes the different user roles within OpenEdge View, and the permissions that coincide with them.

	Merchant Manager	Limited Merchant	Innovo Merchant Manager	Merchant Clerk	Limited Merchant Clerk	Innovo Merchant Clerk	Reporting Manager	Reporting Clerk	Virtual Terminal Manager	Virtual Terminal Clerk	Virtual Terminal Only
User Management											
Create/Edit/Disable User of Same User Type	X										
Create/Edit/Disable User of Same User Type (Own domain only)		X	X								
Create/Edit/Disable User of Lower User Type	X										
Create/Edit/Disable User of Lower User Type (Own domain only)		X	X								
See Other/External User of Same User Type (All domains)	X										
See Other/External User of Same User Type (Own domain only)		X	X								
Lock/Unlock User of the Same User Type	X										
Lock/Unlock User of the Same User Type (Own Domain Only)		X	X								
Lock/Unlock User of the Lower User Type	X						X		X	X	
Lock/Unlock User of the Lower User Type		X	X								
Reset Password/Secret Question	X										
Reset Password/Secret Question (Own domain only)		X	X								
View/Edit Themselves	X	X	X	X	X	X	X	X	X	X	X

	Merchant Manager	Limited Merchant	Innovo Merchant Manager	Merchant Clerk	Limited Merchant Clerk	Innovo Merchant Clerk	Reporting Manager	Reporting Clerk	Virtual Terminal Manager	Virtual Terminal Clerk	Virtual Terminal Only
Terminal Management											
Disable Terminal (Own domain only)		X	X								
Edit		X	X								
Generate Auth Key											
Edit Merchant Nickname/Terminal Nickname	X	X	X								
Suspend Terminal	X	X	X								
Limited Merchant View (i.e. Terminal/Merchant Nickname)	X	X	X								
Lock/Unlock Terminal (Own domain only)		X	X								
Edit Merchant Nickname/Terminal Nickname (Limited to their Domain)		X	X								
Location Management											
Limited Merchant View (i.e. Location Nickname)	X										
Chain Management											
View	X										
Rules											
Configure Rules	X										
Reports											
View Reports	X			X		X	X	X	X	X	
Batches											
Search Batches	X			X		X	X	X	X	X	
Settle Batches	X			X							
Transactions											
Search Transactions	X			X		X	X	X	X	X	X

	Merchant Manager	Limited Merchant	Innovo Merchant Manager	Merchant Clerk	Limited Merchant Clerk	Innovo Merchant Clerk	Reporting Manager	Reporting Clerk	Virtual Terminal Manager	Virtual Terminal Clerk	Virtual Terminal Only
Perform Auth, Sale transactions	X			X		X			X	X	X
Perform Capture, Adjust transactions	X			X		X	X		X		
Perform Dependent Refund, Void transactions	X			X		X	X		X		
Virtual Terminal											
Use Virtual Terminal	X			X		X	X		X	X	X
Invoice											
Search Invoice	X			X							
Create Invoice	X			X							
Analytics											
View Analytics	X	X	X	X	X	X	X	X	X	X	X

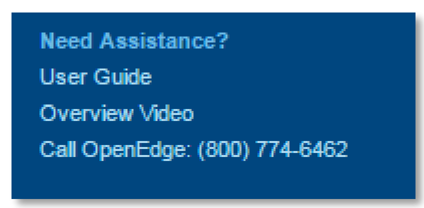
QUICK LINKS

Quick links are used to quickly navigate to other OpenEdge portals. (OpenEdge Check Portal, Gift Portal, etc.)

1. Log into OpenEdge View and click the **More** tab to expand.
2. You will see the options you can choose.
3. Click the desired Quick Link to open the selected portal in a new window.

USER HELP

User Help options are easily accessible through the OpenEdge View website when logged in. To access them, simply locate the **Need Assistance?** section in the bottom right corner of the Home screen. There you can find a **User Guide,** an **FAQ**, a support phone number, and a link to an **Overview Video**. You may view or download the PDF version of the User Guide.



CHANGE HISTORY

Change History		
Date	**Author**	**Description**
7/14/2020	KAJ	Updated password requirements, Decline Minimizer renamed “Card Update Report (Decline Minimizer), updated corresponding screenshots.
4/17/2020	CB	Added “Payment Request” section.
11/13/2019	KAJ	Updated screenshots and verbiage to reflect “Account” to “Terminal” terminology change.
11/07/2019	KAJ	Added The Future of Legacy Merchant Portal section.
05/29/2019	NSC	Added Customer Engagement Suite section. Added new user roles: • Limited Merchant Manager • Innovo Merchant Manager • Limited Merchant Clerk • Innovo Merchant Clerk
08/24/2018	NSC	Added **FAQ** to list of available User Help resources.
02/21/2018	NSC	Updated screenshot for Transaction Search section.
05/02/2017	BBF	Added Void as a Check Charge Type. Updated Accounts screenshot.
04/27/2017	BBF	Updated Batch Detail screenshot.
04/10/2017	BBF	Added “Offline Capture” to Credit Card Charge Types. Updated Batch Summary screenshot.
03/13/2017	BBF	Added Check Charge Type section to Virtual Terminal.
02/27/2017	BBF	Updated OEV Home Page screenshot.
12/22/2016	BBF	Updated User Help section to include Training Video link. Added screenshot to Edit a User section to show which fields are available to be edited.
07/21/2016	BBF	Updated Custom Fields screenshot. Added Batch Summary and Batch Detail sections. Updated successful sale screenshot in the Processing Transactions section.

Change History		
Date	**Author**	**Description**
07/26/2016	BBF	Added note in My User Profile section explaining the changes that are made to the username when the Email is changed.
10/12/2016	BBF	Updated “Email Receipt” section to include customizing the desired email address. Added “User Help Guide” section. Added “Manual Batch Closing” section.
06/10/2016	BBF	Added User Roles Section. Referenced User Roles section in Create a New User section with a hyperlink. Adding instructions on granting or denying access to accounts in the Create a New User section. Removed Manage Chains, and Manage Locations sections.
05/01/2016	BBF	Initial documentation.