Express to iQ Functions Guide

Function	***How You've Done It in Express***	***How You'll Do It in iQ***
Review a transaction using the Last 4 Digits of the card number or token number	• Navigate to the Merchant tab, then to Transaction Research and Partial Card Lookup under that. • Fill in the hierarchy information and enter the Last 4 Digits of the card number or token number and then run your search. *Note that you can pull only the last 31 days' worth of data.*	• Navigate to the Reconciliation tab, then to Transaction Research under that • Fill in the hierarchy level (if applicable) and date range. Under Additional Criteria, ensure that the correct radio button is selected, and enter the last four digits of the number. Then, click the "Search" button. • The transaction should display in the search results directly below • *Alternatively, enter the last 4 of the card number into the Quick Search bar at the top of any iQ screen and click the magnifying glass icon to run your search.*
Review a transaction using the full card number or token number	• Navigate to the Merchant tab, then to Transaction Research and Account Review Express under that. • Fill in the hierarchy information and the full card number or taken number and then run your search. *Note that you can pull the last 18 months' worth of data.*	• Navigate to the Reconciliation tab, then to Transaction Research under that • Fill in the hierarchy level (if applicable) and date range. Under Additional Criteria, ensure that the correct radio button is selected, and enter the full number. Then, click the "Search" button. • The transaction should display in the search results directly below • *Alternatively, enter the full card number into the Quick Search bar at the*

		top of any iQ screen and click the magnifying glass icon to run your search.
View your reports and statements	• Navigate to the Reports & Statements tab, and then to View Reports • Your available reports will display	• Navigate to the Reports tab • Fill in the hierarchy level (if applicable) and date range, then click the “Get Reports” button • Click on the report you need to download it ***Bulk download of reports coming soon in iQ***
View your deposit information	• Navigate to the Merchant tab, and then to Merchant Summary • Fill in the date range and hierarchy level to perform your search • All your deposit information will display, including DDA and ACH information	• Navigate to the Reconciliation tab, then to Summary under that • Fill in the hierarchy level (if applicable) and date range, then click the “Search” button • Scroll down to the Checking Account Activity area, where you can find data on your deposits • You can drill down to view additional detail on your Checking Account Activity
View your reconciliation details	• Navigate to the Merchant tab, then to Transaction Research and Merchant Summary under that • Fill in the hierarchy level and date range to run your search • Your details will display	• Navigate to the Reconciliation tab, then to Summary under that • Fill in the hierarchy level (if applicable) and date range, then click the “Search” button. • Summary data will display below the search form
View your batch	• From the Merchant	• From the Merchant

totals	Summary results above, click on magnifying glass to the left of the Settlements option • Batch totals will display	Summary above, scroll down to the Settlements area. Click the “By Payment Method” link, then on “Show Batches.” • Details on your batches—including totals—will display.
Customize your alerts	***NOT AVAILABLE IN EXPRESS***	• Navigate to your User Profile by clicking on the “Hello [Your Name]” link at the upper right of any iQ page. • From here, click the Alert Preferences tab. Select the alerts you’d like to receive, by SMS text message, email or on-screen. Click the “Update Preferences” to save your changes.
Export your data	• From the data grid you need to export, click the floppy disk icon at the top right of grid • Choose to export your data in either Excel or CSV format	• From most data grids, click the  icon to export the results to Microsoft Excel. • Note that the export function exports only the results currently on your screen, not the entire results set. Increase the “records per page” to 1000 to maximize the number of records you can export at once.
View your chargebacks	• Navigate to the Merchant tab, then to Transaction Research and Merchant Summary	• Navigate to the Reconciliation tab, then to Summary under that • Fill in the hierarchy level (if applicable) and date

	under that • Fill in the hierarchy level and date range to run your search • Locate the area called “Chargebacks and Retrievals,” then click on the magnifying glass icon at the left • Details on the disputes will display, including images	range, then click the “Search” button. • Scroll down to the Disputes Activity area, and click on the “View All Dispute Activity” link at the right. • Click the camera icon at the left of any dispute to view images associated with that item.
Process a transaction using Virtual Terminal	• Navigate to the Merchant tab, then to Virtual Terminal and Virtual Terminal Express under that. • Fill in the Chain Number and Merchant ID, enter the account information and then authorize the transaction.	• Navigate to the Virtual Terminal tab, then to Credit Authorizations under that. • Fill in the required criteria on this screen, which is marked with a red asterisk. Then, click the “Authorize” button. **COMING TO iQ IN SEPTEMBER 2015: You’ll be able to initiate a Virtual Terminal transaction from an existing transaction.**
Process a group of transactions using Virtual Terminal	• Navigate to the Merchant tab, then to Virtual Terminal and Virtual Terminal Express under that. • Select the radio button at the top of the screen to indicate whether you are using Account Numbers or Tokens in your bulk file. • Choose your file to upload the group of transactions for	• Navigate to the Virtual Terminal tab, then to Credit Authorizations under that. • Select the radio button at the top of the screen to indicate whether you are using Account Numbers or Tokens in your bulk file. Then, click “Browse” to locate your bulk transactions file, and upload it to authorize the group of transactions.

	authorization	
Add a new user who needs access to the system	*Call Client Services or your Relationship Manager*	• Navigate to the Administration tab, then to User Administration under that. • Click the "Invite a New User" button at the top of the screen. • Complete the set-up wizard to assign the required access, applications, special functions and reports to the user. Then, you'll provide the user's email address to send him or her the iQ invitation. *Note that only users who have been provisioned as Administrators will see and have access to the Administration tab.*
View information on a BIN (Bank Identification Number)	• Navigate to the Merchant tab, then to Transaction Research and BIN Search under that. • Key in the six-digit BIN and run the search.	• Use the quick search bar at the top of any iQ screen. Key enter the six-digit BIN, then click the magnifying glass icon to run the search. • Details on the associated institution will display on a new screen.
Change your account preferences (e.g., phone number or email address)	• Navigate to the Administration tab, then to Administration and Set Preferences under that. • From here, you can change your password, email address, security questions and phone number.	• Navigate to your User Profile by clicking on the "Hello [Your Name]" link at the upper right of any iQ page. • From here, you can change your name, email address, phone number, password, security questions and alert preferences. You *cannot* change your username or

		system access.
View real-time authorizations	• Navigate to the Merchant tab, then to Transaction Research and Authorization Review under that. • Select the Chain Code *and* Store Number *or* Merchant ID, and the date range (no longer than five days) to run the search.	• Navigate to the Reconciliation tab, then to Summary under that • Fill in the hierarchy level (if applicable) and date range, then click the "Search" button. • Scroll down to the Authorization Activity area, and click the "View All Authorization Activity" to view all details. *Note that the date range for this search is not limited at this point.*
Review a group of transactions for possible problems or fraudulent activity	***NOT AVAILABLE IN EXPRESS***	• Navigate to the Reconciliation tab, then to Transaction Research under that • Fill in the hierarchy level (if applicable) and date range, then click the "Search" button. • On certain transactions, you'll notice a color-coded flag in that row. Hover your mouse over the flag to reveal the reason for the flag. Depending on this, you may need to perform additional research or actions on the transaction.
Perform a single or mass gift card transaction	• For a single transaction, use Virtual Terminal to process the transaction. • For a mass transaction,	***COMING TO iQ IN 2016***

	navigate to the Merchant tab, then to Gift Card and Mass Transactions under that. • Fill in the hierarchy, choose the transaction type and enter the card range to authorize the group of transactions.	
Customize your grid preferences	• Most grids have a "Column Preferences" option at the left • From here, you can move columns between the hidden and visible options, as well as reorder columns • You can save your preferences so they are applied the next time you visit this screen	• From most results grids, click the "Show or Hide Columns" link at the top. • From this window, you can select which columns you'd like to see in your grid. You can also drag and drop columns using your mouse to rearrange the columns. • Click "Save this View" above the grid to save those columns for the next time you visit this screen.