# Resource Online
# User Guide

JUNE 2013

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# 1. Introduction

## 1.2. APPLICATION OVERVIEW

Resource Online gives you access to all your transaction and reconciliation data – batch, submissions, authorizations, settlements, chargebacks and much more. It is a suite of innovative, secure web-based products that you can log in to from just about any PC that has an Internet connection.

## 1.3. GETTING HELP

There are many ways to get help with Resource Online.

### SELF-SERVICE

User guides and quick reference guides are available on chasepaymentech.com and in our merchant Comm Central portal as well as Resource Online itself.

### MERCHANT SERVICES

If you need assistance in interpreting your data, please contact your account executive or call the telephone number listed on your merchant statement.

### TECHNICAL SUPPORT

Contact our Advanced Product Support group 24 hours a day, 7 days a week, if you are having difficulty accessing Resource Online or any of its components.

**U.S. Advanced Product Support (APS)**

RTLWebReporting@ChasePaymentech.com or 1.800.254.9556

**Canada Advanced Product Support (APS)**

torinternetcommerce@chasepaymentech.ca or 1.800.265.5158

| For Assistance: |
| --- |
| For training or assistance in understanding report data, you can call 1.888.886.8869 (U.S.) or 1.800.265.5158 (CAN). |

## 1.4. SYSTEM REQUIREMENTS

The following are required before accessing Resource Online from a PC:

**1)** Internet Service Provider.

**2)** Browser – Microsoft Internet Explorer 6.0+.

**3)** Valid email address for delivery of user name and password information.

**4)** Resource Online user name provided by Chase Paymentech.

**5)** Acrobat Adobe Reader 5.0 or higher (most current version may be downloaded for free from www.adobe.com).

**6)** Optional: Microsoft Excel and Access 2000+

**7)** Optional: Zip/unzip software/shareware for data file access (optional).

## 1.5. SECURITY FEATURES

Security is serious business. To protect your sensitive data, Resource Online includes the following.

**1) Web-Based Security:** Chase Paymentech operates a secure website and adheres to security guidelines. Chase Paymentech houses our web application servers in a state-of-the-art facility with security that meets or exceeds the industry standards.

**2) Encryption Technology:** When accessing the information on the website, the application uses "https" (hypertext transfer protocol secure) as part of the URL to provide security for exchanging information as it travels between Chase Paymentech and the user.

**3) Password Protection:** Chase Paymentech requires each user to be assigned a unique user name and password that allows only that user access to the data.

**4) Enhanced Login Security:** Chase Paymentech requires each user to select three challenge questions and specify answers to each that are appropriate to the user. In addition, the user must select a personal image and a security phrase, which must be confirmed each time the user logs in to a Chase Paymentech application. Lastly, the user can select whether the application should "remember" their current device for future use. If not, the user will be prompted to answer their specified challenge questions to verify their identity when logging in with unremembered devices.

**5) Account Number Masking:** Account Number Masking is a feature that masks portions of cardholder and bank account numbers to prevent unnecessary exposure of sensitive data.

# 2. Getting Started

## 2.1. LOGGING IN AND OUT

### FIRST TIME LOGIN: ENROLLING IN ENHANCED LOGIN SECURITY

**1)** In the **Address** field in the Internet browser, enter: *http://rol.paymentech.com*. Or, visit chasepaymentech.com and on the **Merchant Login** page, select **Resource Online** and click the **Go** button.

**2)** The **Secure Login** page displays. Enter the user name provided by Chase Paymentech in the **Enter Your User Name** field, and then click **Login**.

**Secure Login**
Enter your user name. You will enter your password on the next page.

**Enter your user name**

Login  🔒 Secure Site

Where do I enter my password?
Need assistance logging in?

Please be aware that after 15 minutes of inactivity, you will be required to login again.

Note: All passwords expire every 90 days and accounts that are inactive for an extended period may be deleted.

**3)** If the user name submitted is valid, then a second **Secure Login** page displays. Enter the appropriate password in the **Password** field and click **Submit**.

| Note: Passwords |
|---|
| Passwords are case sensitive. Click the **Forgot Your Password** link on the **Secure Login** page for password assistance. |

**Secure Login**
Confirm your personal image and security phrase.

**Your Personal Image**

phrase
If this is not your personal image or security phrase, **do not log in.**
Contact your Account Executive or customer service at 800-254-9556.

ⓘ IMPORTANT
- If this is not your personal image or security phrase, contact your Account Executive or customer service at 800-254-9556.
- To change your challenge questions, personal image or security phrase, check the box to the left and log in with your password.

**Password**

☐ Change challenge questions or personal image.

Submit  🔒 Secure Site

Forgot your password?
Personal image doesn't match?
Need assistance logging in?

Please be aware that after 15 minutes of inactivity, you will be required to login again.

Note: All passwords expire every 90 days and accounts that are inactive for an extended period may be deleted.
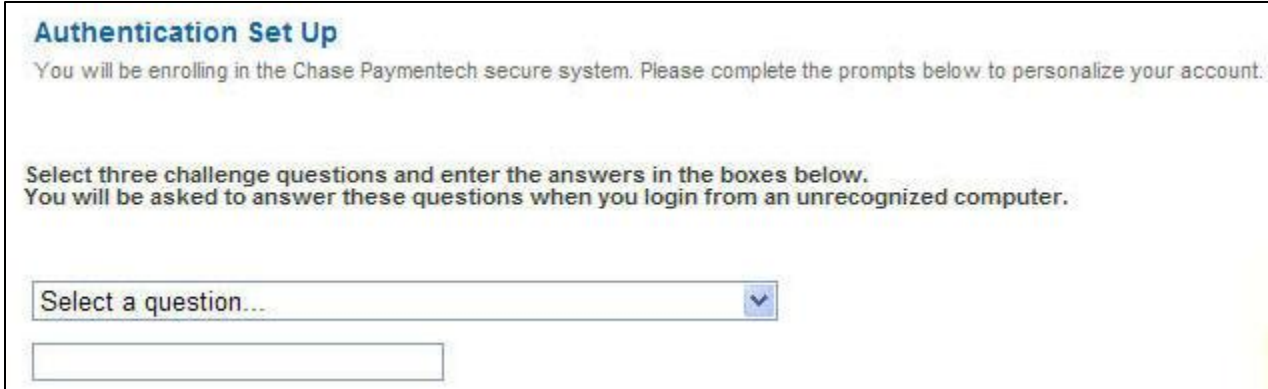
**4)** If the submitted password is valid and the user has not previously completed the Enhanced Login Security process to customize their login process, then the **Authentication Set Up** page displays.

**5)** From each **Select A Question** dropdown, select a challenge question. In each dropdown's subsequent field, enter the appropriate answer to the selected question.

**Note: Required Fields**

A selection from the user is required for each field on this page to complete successful enrollment and ensure future Resource Online access.

**Authentication Set Up**

You will be enrolling in the Chase Paymentech secure system. Please complete the prompts below to personalize your account.

Select three challenge questions and enter the answers in the boxes below.
You will be asked to answer these questions when you login from an unrecognized computer.

Select a question...

**6)** The **Personal Image** area displays a default image. Click **Change Image** and, in the **Select An Image** window, click to specify a new image to be assigned to the user name.

Choose a personal image and enter a security phrase. You will be asked to confirm your personal image and security phrase each time you log in.

Personal Image

Change Image

7) After a personal image has been selected, enter a unique phrase in the **Security Phrase** field. This phrase does not need to be related to anything in particular, not even the personal image. On subsequent logins, this submitted phrase will display; if the image or phrase has changed without the user's knowledge, then fraud may have been committed and technical support should be contacted prior to logging in.

8) In the **Do You Want To Remember This Computer** area, select the applicable radio button to designate whether or not, for future use, the computer being presently used should be recognized by our system. If the **Yes, Remember It. This Is My Computer** radio button is selected, then you will not be asked your security questions the next time you log in using the same machine.
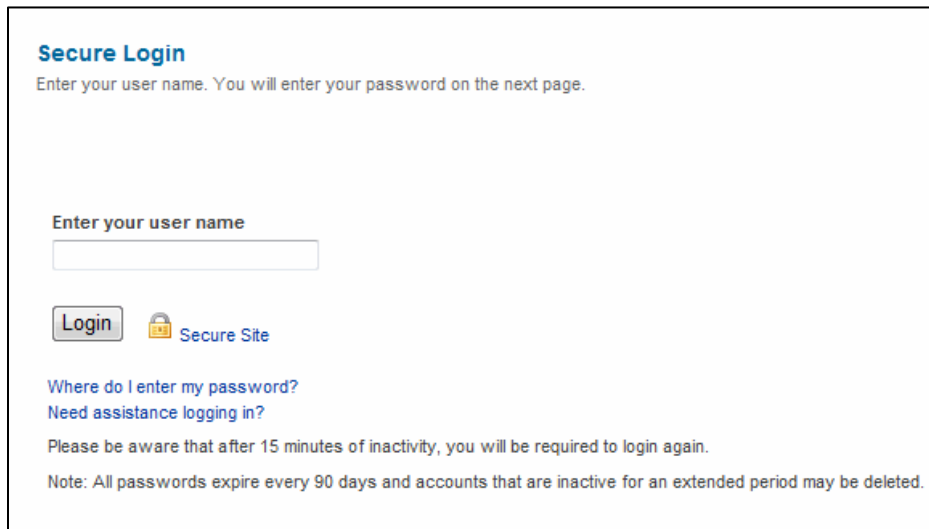
9) Once all fields are complete and selections have been made, click **Submit** to finish the enrollment process.

| Note: **Unrecognized Devices** |
|---|
| When an enrolled user logs in from an unrecognized computer or device, they are presented with one of their own challenge questions, and are prompted to identify whether they are accessing the site from a personal or public computer. |

## LOGGING IN

In the **Address** field in the Internet browser, enter: *http://rol.paymentech.com*. Or, visit chasepaymentech.com and on the **Merchant Login** page, select **Resource Online** and click the **Go** button.

**1)** The **Secure Login** page displays. Enter the user name provided by Chase Paymentech in the **Enter Your User Name** field, and then click **Login**. If the user name is incorrect, then the following message displays: "The username you entered does not match our records."

> **Note**: **Changing** the **Password**
> Click **Where Do I Enter My Password** to prompt a **Password Changes** pop-up window to display.

**Secure Login**
Enter your user name. You will enter your password on the next page.

**Enter your user name**

[ Login ] 🔒 Secure Site

Where do I enter my password?
Need assistance logging in?

Please be aware that after 15 minutes of inactivity, you will be required to login again.

Note: All passwords expire every 90 days and accounts that are inactive for an extended period may be deleted.

**2)** If the submitted user name is valid, then a second **Secure Login** page displays. Enter the appropriate password in the **Password** field. Click **Login**. If the password is incorrect, then the following message displays: "The password you entered does not match our records." If an incorrect password is submitted five times, then the system will lock out the user and the user must reset their password by clicking **Forgot Your Password** or contacting technical support.

> **Note**: **Assistance**
> Click **Need Assistance Logging In** to change your password or to contact technical support.

**3)** If you have previously chosen not to remember the computer you're using, or are using a different computer, then you will be presented with one of your previously selected security questions. Answer the question correctly to continue with the login process.

**Secure Login**

Confirm your personal image and security phrase.

**Your Personal Image**

phrase

If this is not your personal image or security phrase, **do not log in.**
Contact your Account Executive or customer service at 800-254-9556.

**Password**

☐ Change challenge questions or personal image.

Submit    🔒 Secure Site

Forgot your password?
Personal image doesn't match?
Need assistance logging in?

Please be aware that after 15 minutes of inactivity, you will be required to login again.

Note: All passwords expire every 90 days and accounts that are inactive for an extended period may be deleted.

ⓘ IMPORTANT

- If this is not your personal image or security phrase, contact your Account Executive or customer service at 800-254-9556.
- To change your challenge questions, personal image or security phrase, check the box to the left and log in with your password.

**Note: Making Changes**

To modify the Enhanced Login Security selections and revisit the **Authentication Set Up** page, select the **Change Challenge Questions or Personal Image** checkbox when submitting a password during future logins.

**Note: Passwords**

Passwords are case sensitive. Click the **Forgot Your Password** link on the **Secure Login** page for password assistance.

## LOGGING OUT

To log out, click the **Log Out** link at the top of the page.

Resource Online has an automatic timeout of 15 minutes. After 15 minutes of inactivity, the user name will be automatically logged out for security purposes.

**Note: Be Alert**

If the image that displays in the **Your Personal Image** area and the phrase below are not exactly what was selected during the enrollment process, then click **Personal Image Doesn't Match** to reset the password or contact technical support.

## 2.2. NAVIGATING RESOURCE ONLINE

### RESOURCE ONLINE HOME PAGE

In Resource Online, everything you need is available from the links and menus on the top of the page.

1) **Home** – Click to return to the main page for Resource Online.

2) Global User Navigation Menu (all users will have these options)

   - **Log Out** – Click to exit the application.
   - **Admin** – Click to access the administration module of Resource Online.
   - **Bank Lookup** – Click to look up bank contact information.
   - **Help** – Click to access the Online Help function.

3) **Report Module Menus** – Navigate these menus to generate reports.

In addition, the body of the home page includes links to the subscribed modules, which provide an alternative to the dropdown menus for navigation.

> **Note**:
> Based on the individual user setup, other reporting module menus may be available.



### LANGUAGE TOGGLE

Canadian users can select to switch to the Canadian French version of the application by clicking the **Français** link on the home page, or click the **English** link to toggle back to the English language version of the application.

### LINK TO AMERICAN EXPRESS OMS

U.S. users can click this image to open a new page that contains information and instructions for enrollment in Online Merchant Services (OMS), the American Express online reporting system. This option is not available for Chase Paymentech Canadian subscribers.

### NEED HELP LINK

Click this image to open a contact form to complete and submit. The information is then routed to the Advanced Product Support (APS) group for technical support.

### QUICK LINKS

On the right side of the home page are quick links to Adobe Reader (.pdf) versions of user guides, quick reference guides and appendices for the reporting systems. These quick links will include references only for the Resource Online modules to which the user has subscribed.

### DID YOU KNOW?

This box contains tips about Resource Online and its applications.

## INSTANT DASHBOARD

The Instant Dashboard is an alternative Resource Online home page for subscribing small business U.S. users. It provides a snapshot of your daily sales and settlement figures. To view more detailed data payment processing data, you can select various reports and searches from the Recon Solution or Virtual Transaction Manager menus.



1) **Home** – Click to return to the main page for Resource Online.

2) Global User Navigation Menu (all users will have these options)

- **Log Out** – Click to exit the application.
- **Admin** – Click to access the administration module of Resource Online.
- **Bank Lookup** – Click to look up bank contact information.
- **Help** – Click to access the Online Help function.

3) **Report Module Menus** – Navigate these menus to generate reports.

**Note**:
Based on the individual user setup, other reporting module menus may be available.

## *Basic Navigation*

The Instant Dashboard is comprised of six panels. Each panel has the same option links at its top-right corner:

- The **Menu** can contain the following options:
  - **Settings** allows you to modify the date range to widen or narrow the focus of your search. You can enter the date range you wish to see in the graph in the **From** and **To** fields (or use the **Calendar** icons) and then click **Go**.
  - The **Download** options allow you to open or save the data in the panel as a PDF, CSV or XLS file that you can download to your computer or import into your own system.
  - The **Minimize** icon "hides" the body of the panel, leaving only the panel heading and its option links.
  - The **Close** icon removes the entire panel from the Instant Dashboard. To view all panels again, refresh the page in your Internet browser or click Home in the Resource Online reports menu.
- Click the panel name to view the detailed data in a report view.

## *Panels*

## Quick Search Panel

- To research a specific transaction, enter the beginning of the cardholder account number in the **Cardholder Number** field.
- Or, you can select the **Search By Last Four** checkbox and enter only the last four digits of the cardholder's account number.
- Click **Search** to begin.
- The selected date range is displayed below the **Search** button. To modify the date range, click the Quick Search panel's **Menu** option and select **Settings**.

## Statements Panel

The Statements panel displays links to the five most recent statements available. If you have multiple locations, you can place your cursor over the **Advanced Options** link to view additional selections for statement type and hierarchy/merchant number. To view more: on the **Recon Solution** menu, select **Statements** and click **View Statements**.

## Sales Summary Panel

The Sales Summary panel displays your recent batch totals by day – immediately assess your daily sales totals. Place your cursor over the data points to view that day's total items sold, total sales amount, the settled amount (amount deposited into your bank account by Chase Paymentech), the non-settled amount (amount deposited into your account by a third party) and any adjustment amounts. To get additional data: on the **Recon Solution** menu, select **Daily Report Review** and click **Batch Summary**.

## Settlement Summary Panel

The Settlement Summary panel displays net amount deposited into your bank account each day – review the net amount deposited in your account after fees have been deducted. Place your cursor over the data points to view the total number of deposits paid by Chase Paymentech and the total dollar amounts. To get additional data: on the **Recon Solution** menu, select **Settlement Review** and click **Settlement Summary**.
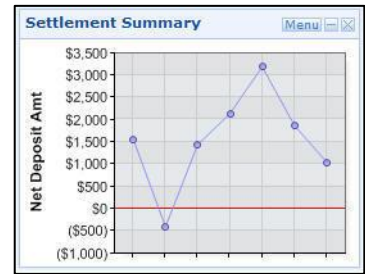
## Card Summary Panel

The Card Summary panel displays daily sales totals by payment brand – see the amounts that will be paid by a third party. Place your cursor over the bars to view the exact amount. To get additional data: on the **Recon Solution** menu, select **Daily Report Review** and click **Card Type Summary**.

## Recap Summary Panel

The Recap Summary panel provides a calculated summary of your merchant activity deposits and adjustments, and allows you to easily determine the bottom line—what was deposited in your bank account at the end of the day.

# 3. Admin

## 3.1. INTRODUCTION

Users created by Chase Paymentech may be assigned admin rights. This user has the ability to control who has access to your merchant information and can:

▸ **SET UP USERS**
▸ **DELETE USERS**
▸ **CHANGE REPORT ACCESS**

> **Note**:
> Passwords may be changed for the individual user by clicking the **Forgot Password** link on the **Login** page.

## 3.2. ACCESSING ADMIN

On the Resource Online home page, click the **Admin** link at the top of the page.



## 3.3. USER SUMMARY

The User Summary page displayed shows the current user's accounts with access to your merchant information through Resource Online.
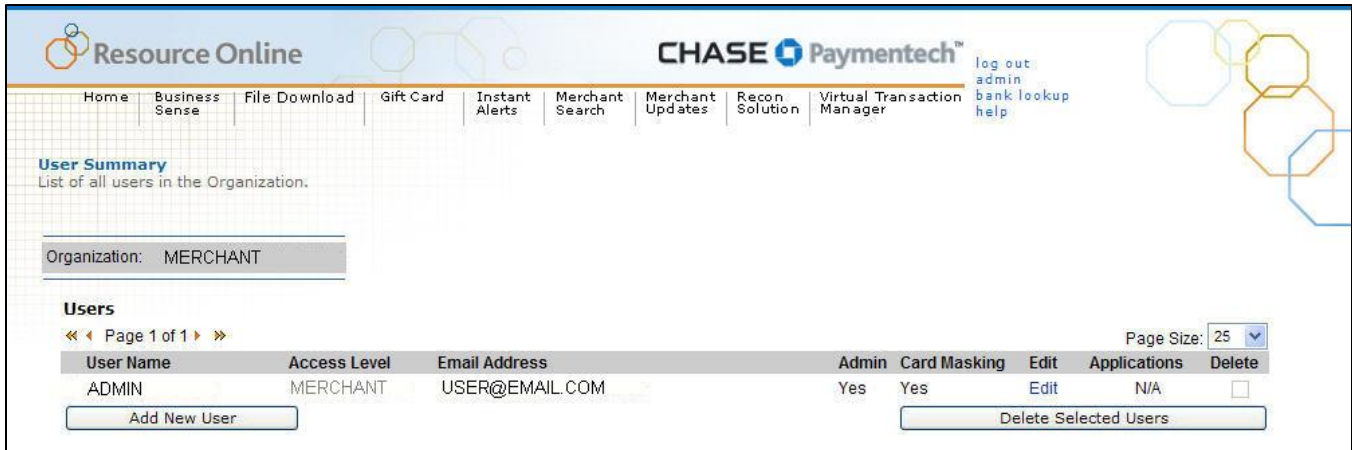
*Table: User Summary – Field Descriptions*

| FIELD | DESCRIPTION |
|---|---|
| Organization | Assigned by Chase Paymentech when the Resource Online login is created. For internal purposes only. |
| User Name | The user's Resource Online login. |
| Access Level | The name of the hierarchy level to which the user has access. The hierarchy structure allows larger merchant accounts to be easily segmented for review of separate and combined business levels. |
| Email Address | The email address of the individual user. |
| Admin | Indicates whether the user has admin rights, which is the ability to create additional users; change the rights and report access for these users; and delete users. |
| Edit | Clicking the **Edit** link for any user allows the Admin user to modify the settings for that user. |
| Applications | Clicking the **View** link for any user allows the Admin user to view or change the Resource Online applications to which that user has access. For the Admin user, "N/A" is displayed. If the Admin user needs to change the Resource Online application access, the user must contact Chase Paymentech for assistance. |
| Delete | Selecting this checkbox flags that particular user account to be deleted when the **Delete Selected Users** button is clicked. |
| Add New User | Clicking this button allows the Admin user to add new Resource Online users to the organization. |
| Delete Selected Users | Clicking this button deletes any users for which the **Delete** checkbox is selected. |

## 3.4. ADD NEW USER

Admin users have the ability to add users and grant them access to your merchant reports within Resource Online. By default, a new user will have the same report access as the admin user, but the admin user can also create new users with a custom set of reports.

1) Click the **Add New User** button on the **User Summary** page.

2) On the **Define User** page, complete the fields for the new user.

3) Click **Next** to create the user name. Or, click **Cancel** to clear the form and return to the **User Summar**y page.

4) The new user will receive emails containing the user name; a link to the Resource Online **Login** page and the password for access.

5) After the additional user has been created, then the **User Summary** page displays with the new user listed. If changes are required, review the **Edit User** section for assistance.

> **Note**:
>
> If the error message "User Already Exists" is displayed, the value entered for the user name is not available for use. Another value must be entered. Each user name must be unique in the Chase Paymentech database.

**Define User**
Add a new user to Resource Online.
This is one step in a multiple step process. The new user is not complete until you have accepted the confirmation.

Organization:

**User Information**

User ID:

First Name:

Last Name:

E-Mail:

Verify E-Mail:

Setup Type: ● Default ○ Custom

Cancel    Next

*Table: Add New User – Field Descriptions*

| FIELD | DESCRIPTION |
|---|---|
| Organization | Assigned when the login is created. For internal purposes only. |
| User ID | The user name being created for the additional login. The user name must be a unique value and is limited to 7-70 alphanumeric characters. It must not contain spaces, special characters, or consist of an email address. The user name is not case-sensitive. |
| First Name | The first name of the individual user. |
| Last Name | The last name of the individual user. |
| E-Mail | The email address of the individual user. |
| Verify E-Mail | Re-enter the email address of the individual user. If there is a discrepancy between the two email addresses entered, three red asterisks will appear to the right of the field. |

| Setup Type | Determines whether the new user name will have the same report access as the admin user. Options include:<br>**Default** – Choose this option if the new user name will have the same report access as the admin user.<br>**Custom** – Choose this option if the new user name will have different rights and/or different report access than the admin user. |
|---|---|

## 3.5. CUSTOM SETUP TYPE

**1)** If **Custom Setup Type** was selected during the **Add User** process, additional pages are displayed to customize the access and/or reports that are visible to the individual user.

**2)** The **Select Level** page displays the hierarchy level for the new user name

**3)** Click **Next**.

**4)** Select or deselect the reporting modules the user may access. If no further changes are required, click **Done**. If the checkbox to the left of the application module name is selected, then the user has access to that module.

**5)** Reporting modules that have numerous levels of reports provide the ability to customize the specific reports displayed for the user. To customize access to specific reports by individual user, click the **Customize** button next to the reporting module name.

**6)** Select or deselect the reports by clicking the checkbox to the left of the report name, according to the access that should be granted to the individual user. To save the changes, click the **Save** button. To cancel the changes and return to the **Add Report Groups** page, click the **Cancel** button.

**7)** When complete with all changes to application access or individual report access, click the **Done** button on the **Add Report Groups** page.

**8)** The **User Summary** page displays. If changes are needed, return to the **Edit User** section for assistance.

> **Note**:
> Additional users can be created only at the same hierarchy level as the Admin user.

> **Note**:
> The 🌐 icon identifies the report as a pre-generated report that is automatically created for the user. The new user will not be able to view a pre-generated report until the next time the report is automatically created, which will be the same frequency as it is created for the admin user.

*Table: Add Report Groups – Field Descriptions*

| FIELD | DESCRIPTION |
|---|---|
| Organization | Assigned by Chase Paymentech when the Resource Online login is created. For internal purposes only. |
| User Name | The user name of the Resource Online login. |
| <Module Name> | The name of the module for which the organization receives reports in Resource Online. This checkbox allows the Admin user to define the report modules that the individual user may access.<br>Options include: Virtual Transaction Manager, Recon Solution, Gift Card Reports, Instant Alerts and Merchant Search. These options vary based on the Resource Online modules to which the admin user has access. |
| <Report Group Field> | Some applications have a pre-defined group of reports to which the user can have access. For example, if the Admin user has access to the Recon Solution "Basic" group, selecting this option provides the additional user with access to all of the standard Recon Solution reports. |
| Add | Select a pre-defined group of reports (if applicable) to which the user will have access. |

| Customize | Clicking this button allows the Admin user to further define access to individual reports within each reporting module. Use this option to provide a user access to a subset of reports in the pre-defined report group, or to pick and choose which reports the user will have access to. |
|---|---|
| Remove Selected Items | By highlighting report groups in the listbox above, then clicking the remove selected items link, the Admin user cancels access to an entire group of reports. |
| Done | Click this button when all changes have been made. |

## 3.6. EDIT USER

To edit the information of the individual user, click the **Edit** link for that user from the User Summary page. You can change the user's name or email address, or remove their access to Resource Online.

**Note**:
The user name cannot be edited. If the user name needs to be changed, contact a Chase Paymentech representative.

1) Change any necessary fields.

2) Change the settings as necessary for the individual user. To save the changes, click the **Save** button. To cancel the changes and return to the **User Summary** page, click the **Cancel** button.



*Table: Edit User – Field Descriptions*

| FIELD | DESCRIPTION |
|---|---|
| Organization | Assigned by Chase Paymentech when the Resource Online login is created. For internal purposes only. |
| User | The user name of the individual currently logged in to Resource Online. |
| User ID | The user name of the Resource Online login being edited. |
| First Name | The first name of the individual user. |
| Last Name | The last name of the individual user. |

| Email Address | The email address of the individual user. |
|---|---|
| Verify Email Address | Re-enter the email address of the individual user. If there is a discrepancy between the two email addresses entered, three red asterisks will appear to the right of the field. |
| Lock Out | If a user experiences five unsuccessful login attempts, his user name will be "locked out." If the reason for the lock out is that the user does not know his/her password, click the **Forgot Password** link on the **Login** page. If the reason for the lock out is that the user does not remember his/her user name, the Admin can access this page to advise the user of the appropriate user name. In both instances, the Admin must unlock the user by selecting the **Lock Out** checkbox, so the user will be able to access the system. |

## 3.7. DELETE USERS

**1)** To delete users, select the checkbox in the **Delete** column for the individual to be removed. After selecting all the required checkboxes, click **Delete Selected Users**.

**2)** The **Remove Selected Users** pop-up message displays, asking you to confirm that you want to delete the selected users. Click **OK** to delete or **Cancel** to end the operation without deleting.

**3)** The updated **User Summary** page will be displayed, with the deleted user(s) no longer listed.
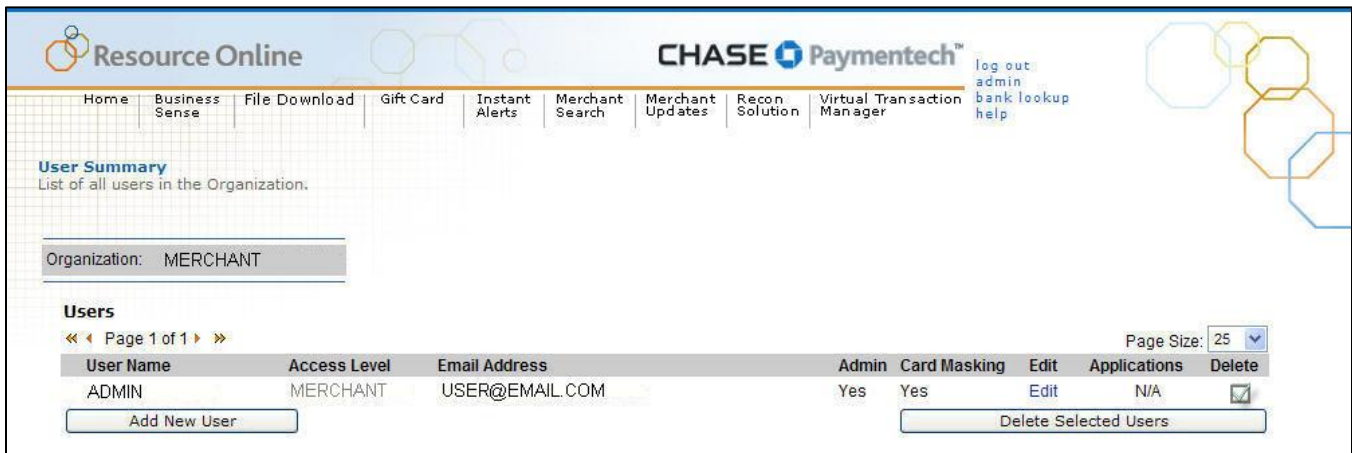
# 4. Bank Lookup

This module of Resource Online allows the user to retrieve bank contact information for the issuer of a particular credit card. This information can be helpful when researching chargebacks and/or retrievals.

## ACCESSING BANK LOOKUP

**1)**   On any page within Resource Online, click the **Bank Lookup** link at the top of the page.

**2)**   Enter the first six digits of the card number in the **Bank Lookup** field and click the **Search** button.

**3)**   The report displays specific information about the bank that issued the card. The information will vary by card issuer.
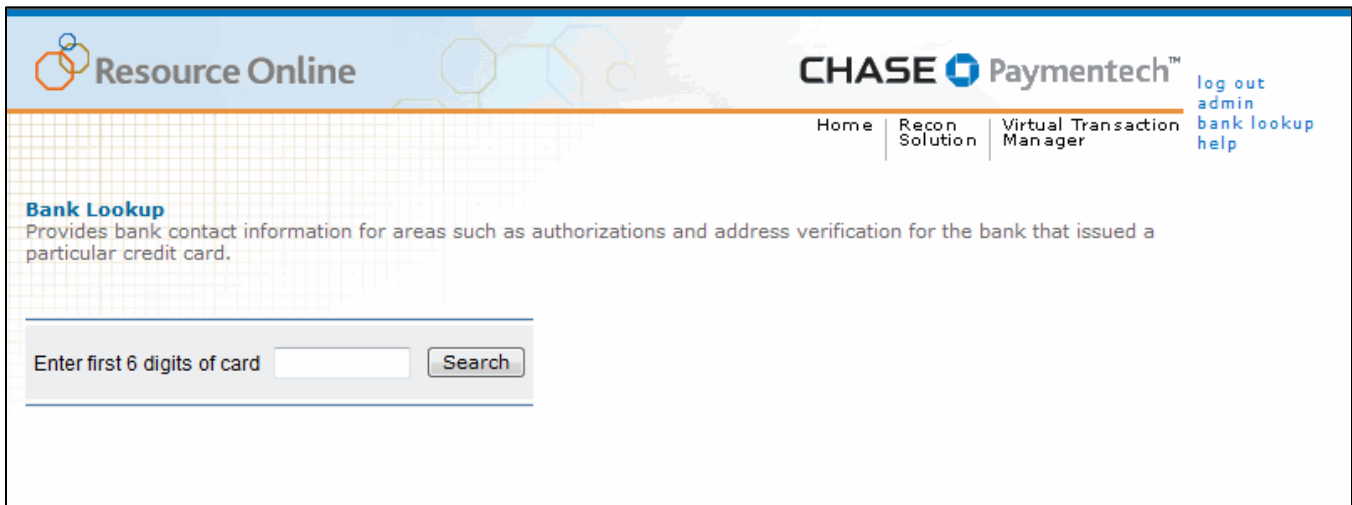
# 5. File Download

The File Download module provides access to raw data files that are behind the reports shown in Resource Online. Merchants who would like to receive these data files should contact their Chase Paymentech representative to be subscribed individually to these reports.

## ACCESSING FILE DOWNLOAD

**1)** On any page within Resource Online, click **File Download** at the top of the active page.

**2)** In the list of subscribed files, click the file name under the **File Description** column to select the file to download. The report data date range is listed under **Date Range** for each file.

**3)** The user will be prompted to save the file. Files are made available for download as compressed (.zip) or comma-delimited (.csv) files, based on expected file size. The kind of file being downloaded is noted in the **File Type** column.

**4)** In the **File Download** dialog box, open the file by clicking **Open**, or save it to a hardware device by clicking **Save**.

**5)** To save the file, in the **Save As** dialog box, select the appropriate destination folder and enter the file name in the **File Name** field. Click **Save** when finished.

**6)** Navigate to and open the saved file.

# 6. Frequently Asked Questions

## 6.1. GENERAL INFORMATION

**1) What can I do to protect my account information?**

- Memorize your password and do not write it down.
- Log off from the application when you are finished viewing your data, or when you will be away from your PC. For your protection, Resource Online will automatically log off users after 15 minutes of inactivity.
- Do not share your logon information with others.

**2) What if I forget my user name?**

Contact Advanced Product Support at 1.800.254.9556 (U.S.) or 1.800.265.5158 (Canada), 24 hours a day, 7 days a week for assistance.

**3) What if I forget my password?**

Click the **Forgot Password** link on the **Logon** page. You will be required to confirm the email address and user name and then will be emailed a temporary password within approximately 15 minutes. Once you have logged on successfully, you will be prompted to change the temporary password. If you cannot remember the email address and user name assigned to the logon, contact Advanced Product Support at 1.800.254.9556 (U.S.) or 1.800.265.5158 (Canada), 24 hours a day, 7 days a week.

**4) Will my password expire?**

Yes. Passwords expire every 90 days. Upon expiration, you will be prompted to enter a new password.

**5) Is my logon information case sensitive?**

Yes. The user name is not case sensitive, but the password is case sensitive.

**6) Will my logon be locked out if I am unsuccessful in attempting to log in?**

Yes, after five unsuccessful attempts, your user account will be locked out. Contact Advanced Product Support at 1.800.254.9556 (U.S.) or 1.800.265.5158 (Canada), 24 hours a day, 7 days a week for assistance.

**7) Is there an automatic user time out?**

Yes. If you are logged in but have not accessed the application for 15 minutes, you will automatically be logged out for security purposes.

**8) How long do files remain the File Download area?**

Files remain in the **File Download** area for 90 days, after which time they are automatically deleted – regardless of whether or not the file has been downloaded.

**7) Can I save the panel graphs to use in a presentation or share with others?**

- Resource Online does not have the ability to let you save a copy of the panel itself. You could use a separate screen capture tool or press the **[Print Screen]** key and copy to an image editor.
- You can also use the panel's **Download** option to export the data to Microsoft Excel and generate your own charts and graphs.

## 6.2. SUPPORT

**1)** **Where can I find more information about the reports?**

A separate Resource Online Reports User Guide is available. It lists all reports offered within the tool as well as descriptions of the data elements.

**2)** **What if I need help with the application?**

If you need technical assistance with this module, U.S. users can contact Advanced Product Support at RTLWebReporting@ChasePaymentech.com or call 1.800.254.9556, 24 hours a day, 7 days a week.

Canadian users can contact torinternetcommerce@chasepaymentech.ca or call 1.800.265.5158, 24 hours a day, 7 days a week.

If you need training or help interpreting data, contact Merchant Services at 1.888.886.8869 (U.S) or 1.800.265.5158 (Canada).

**3)** **When should I contact Advanced Product Support?**

- If you have a problem accessing *http://rol.paymentech.com*
- If you have forgotten your user name
- If you have problems accessing any reports or modules in or from the **Home**, **Admin**, **Bank Lookup** or **File Download** pages
- If you need assistance with printing or exporting data
- If you need assistance with using any of the special features in the application
- If you receive an unexpected error message

**4)** **When should I contact my Chase Paymentech account executive or Merchant Services?**

- If you need assistance understanding the data provided in your Resource Online reports
- If you would like to subscribe to additional reporting modules
- If you have questions or issues with your merchant reporting hierarchy, setup or access levels
- If you need training on the application