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1 **Introduction**

Core Management System is a key business tool used by merchants, to have constant and secure access to all payment transaction information. Core Management System features include transaction search capabilities, fast access to batch details, comprehensive reports, settlement (deposit) information, and online statements.

2 **Getting Started**

2.1 **Logging in and Changing Your Password**

Once your merchant account has been set up, you will receive a welcome email for Core Management System. In this email, you will be provided with your user name needed for Core Management System, as well as a temporary password. You will be prompted to change your temporary password upon initial login. To access Core Management System, you can click on the link provided in the welcome email or go to www.coremanagementsystem.com

2.1.1 Login Screen

![Customer Login](image)

**Keep your password safe and secure. If you forget your password, submit your user name and email address in the white box on the login screen. A new password will be emailed to you.**

2.2 **Logging Out**

To log out of the system click on the “Logout” link at the top-right portion of the screen. Users will be automatically logged out of the system after 15 minutes of inactivity.

2.2.1 Logout Screen

![Logout Screen](image)
2.3 Navigation Basics
To navigate through Core Management System use either the menu tabs along the top of the screen or the navigation menu on the left side of the screen.

You can easily find where you are within the series of menus by looking at the crumb trail beneath the menu tabs. To access previous screens, just click on its name. Please use these links rather than the back arrow of the browser.

Links appear in bold blue type and are underlined to make them easy to find. If a field has a dotted underline beneath it, more information will appear when you place your cursor over it.

2.3.1 Navigation Basics

![Image of Core Management System interface]

3 Core Management System - Home
The Core Management System main menu has links to the four functions that are available: Virtual Terminal, Reporting, and My Account.

Virtual Terminal allows merchants to process credit card transactions from any computer with an Internet connection. If this option is not shown, please contact your sales representative to request access.

Reporting provides merchants with payment transaction information, transaction reports, and summary reports.
4 Reporting
To search through authorizations, sales, daily batch details, payment history, and monthly statements click Transactions on the Transaction Reports Screen. (Figure 4.1.1)

4.1 Transaction Reports

4.1.1 Transaction Reports Screen

The Transaction Reports Main Menu (Figure 4.1.2) lists the 8 report types that are available: Card Search, Authorizations, Sales, Batch History, Payment History, Statements, Retrievals, and Chargebacks.

4.1.2 Transaction Reports Main Menu

4.2 Card Search
To search for a specific card transaction, click “Card Search” on the Transaction Reports Main Menu. (Figure 4.1.2)
Enter the necessary search criteria.

Select the date range that you would like to search for. A maximum of 40 days over the past 13 months can be selected.

Click Search after the necessary information has been entered and a date range has been selected.

The search results will populate below the search fields. (Figure 4.2.2)

To sort the data by a specific column, click the linked column headers.

The Card Search results can be viewed in several different formats: CSV (Excel), XML, and Print View.

To export to Excel, click the CSV link on the Card Search Results Screen. (Figure 4.2.2) The Excel download will then populate.

To view the Card Search results in XML format, click the XML link on the Card Search Results Screen. (Figure 4.2.2) A new window will populate with the XML data. (Figure 4.2.3)
4.2.3 Card Search XML View

```xml
<xml><root>
  <item>
    <MID>7507726</MID>
    <DBAName>Test Merchant</DBAName>
    <CardNumber>400300*****6781</CardNumber>
    <CardExpiration>1215</CardExpiration>
    <Amount>$1.00</Amount>
    <CardType>Visa</CardType>
    <TransactionType>Authorization</TransactionType>
    <Date>09/27/10</Date>
    <EntryMode>00</EntryMode>
    <Approval />
  </item>
</root>
```

To print the Card Search results, click the Print link on the Card Search Results Screen. (Figure 4.2.2) A new window will populate with the data in a printer ready format. (Figure 4.2.4)

4.2.4 Card Search Print View

To view specific card transaction information, click on the card number on the Card Search Results Screen. (Figure 4.2.2)

4.2.5 Card Search Specific Card Transaction Information Screen
4.3 **Authorizations**

To search for an authorization, click Authorization on the Transaction Reports Main Menu. *(Figure 4.1.2)*

4.3.1 **Authorization Search Screen**

The authorizations search screen will populate. *(Figure 4.3.1)* Select the date range desired and click Search. The search results will populate below the Date Range field. *(Figure 4.3.2)*
To sort the data by a specific column, click the linked column headers.

The total listed at the bottom of Figure 4.3.2 is for all of the pages returned in the search.

The Authorization Search results can be viewed in several different formats: CSV (Excel), XML, and Print View.

To export to Excel, click the CSV link on the Authorization Search Results Screen. (Figure 4.3.2) The Excel download will then populate.

To view the Card Search results in XML format, click the XML link on the Authorization Search Results Screen. (Figure 4.3.2) A new window will populate with the XML data. (Figure 4.3.3)

To print the Authorization Search results, click the Print link on the Authorization Search Results Screen. (Figure 4.3.2) A new window will populate with the data in a printer ready format. (Figure 4.3.4)
4.3.4 Authorizations Print View

To view specific card transaction information, click on the card number on the Authorization Search Results Screen. (Figure 4.3.2)

4.3.5 Card Specific Authorization Transaction Information Screen

4.4 Sales

To search for Sales, click Sales on the Transaction Reports Main Menu. (Figure 4.1.2)
4.4.1 Sales Search Screen

The Sales search screen will populate (Figure 4.4.1). Select the date range desired and terminal number if needed, click Search. The search results will populate below the Date Range field. (Figure 4.4.2)

4.4.2 Sales Search Results Screen

To sort the data by a specific column, click the linked column headers.

The total listed at the bottom of Figure 4.4.2 is for all of the pages returned in the search.

The Sales Search results can be viewed in several different formats: CSV (Excel), XML, and Print View.

To export to Excel, click the CSV link on the Sales Search Results Screen. (Figure 4.4.2) The Excel download will then populate.

To view the Card Search results in XML format, click the XML link on the Sales Search Results Screen. (Figure 4.4.2) A new window will populate with the XML data. (Figure 4.4.3)
4.4.3 XML Sales Search Screen

To print the Sales Search results, click the Print link on the Sales Search Results Screen. (Figure 4.4.2) A new window will populate with the data in a printer ready format. (Figure 4.4.4)

4.4.4 Sales Print View

To view specific card transaction information, click on the card number on the Sales Search Results Screen. (Figure 4.4.2)
4.4.5 Card Specific Sales Transaction Information Screen

4.5 Batch History

The Batch History option provides daily or monthly batch information. A batch is the accumulation of captured credit card transactions awaiting settlement.

To view Batch History, click Batch History on the Transaction Reports Main Menu. (Figure 4.1.2)

4.5.1 Batch History Search Screen

The Batch History search screen will populate with the current month’s information. (Figure 4.5.1)

Select the date range desired and click Search. The search results will populate below the Date Range field.
4.5.1 Batch History Search Results Screen

To sort the data by a specific column, click the linked column headers.

The total listed at the bottom of Figure 4.5.1 is for all of the pages returned in the search.

The Batch History Search results can be viewed in several different views, the Detail and Summary Tabs, CSV (Excel), XML, and Print View.

The Details tab lists all of the high level batch information for the selected date range. To view a specific transaction, click on the transaction’s create date.

The Summary tab summarizes the batch history information by Card and Transaction Type.

The information in both the Details tab and Summary tab can be exported to Excel, XML, and Print View.

To export to Excel, click the CSV link on the Batch History Search Results Screen. (Figure 4.5.1) The Excel download will then populate.

To view the Batch History Search results in XML format, click the XML link on the Batch History Search Results Screen. (Figure 4.5.1) A new window will populate with the XML data. (Figure 4.5.2)

4.5.2 XML Batch History Search Screen

To print the Batch History Search results, click the Print link on the Batch History Search Results Screen. (Figure 4.5.1) A new window will populate with the data in a printer ready format. (Figure 4.5.3)
4.5.3 Batch History Print Screen

<table>
<thead>
<tr>
<th>Create Date</th>
<th>Transactions</th>
<th>Manual Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/04/10</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>06/05/10</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>06/06/10</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>06/12/10</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>06/14/10</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>06/25/10</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>0</td>
<td>3</td>
</tr>
</tbody>
</table>

4.6 Payment History

The Payment History option provides daily and month-end payment information.

To view Payment History, click Payment History on the Transaction Reports Main Menu. (Figure 4.1.2)

4.6.1 Payment History Search Screen

The Payment History search screen will populate. (Figure 4.6.1)

Select the date range desired and the transaction amount, click Search. The search results will populate below the Date Range field. (Figure 4.6.2)

4.6.2 Payment History Search Results Screen

To export to Excel, click the CSV link on the Payment History Search Results Screen. (Figure 4.6.2) The Excel download will then populate.
To view the Payment History Search results in XML format, click the XML link on the Payment History Search Results Screen. (Figure 4.6.2) A new window will populate with the XML data. (Figure 4.6.3)

```
<ReportingData>
  <item>
    <MID>7507776</MID>
    <DBAName>TEST MERCHANT</DBAName>
    <CreateDate>8/4/2010 12:00:00 AM</CreateDate>
    <Transactions>2</Transactions>
    <ManualTransactions>0</ManualTransactions>
    <Sales:2.0000/Sales>
    <Returns:0.0000/Returns>
    <BatchAmount>2.0000</BatchAmount>
    <Adjustment:0.0000/Adjustment>
    <NetAmount:2.0000/NetAmount>
  </item>
</ReportingData>
```

To print the Payment History Search results, click the Print link on the Payment History Search Results Screen. (Figure 4.6.2) A new window will populate with the data in a printer ready format. (Figure 4.6.4)
4.7  Statements
The Statement option provides monthly merchant processing statements.

To view Statements, click Statements on the Transaction Reports Main Menu. (Figure 4.1.2)

4.7.1  Statement Screen

Up to 13 months of merchant processing statements are available.

To view a specific month’s statement, click on the Statement Date on the Statement Screen. (Figure 4.7.1)

4.7.2  Monthly Processing Statement
Each monthly statement includes an activity summary, deposit detail information, 3rd party batch account details, processing details, authorization details, and other details. (Figure 4.7.2)

The monthly activity summary lists each card type processed, paid, switched, or reported.

The deposit detail information includes a daily accounting of all batches received and/or processed. The process date is the date that the batch was processed.

3rd party batch account details are listed if transactions are sent to 3rd parties for processing and payment.

Processing details include the fees and volume posted to each charge type. Charge types are defined at the bottom of each statement.

Authorization details summarize the type of card authorized and method of authorization.

Additional fees, such as the Visa Acquiring Process fee and MasterCard transaction fees are listed in the Other section.

Any chargeback transactions will be listed under a Chargeback Detail section. The reason and corresponding case reference number will be included.

American Express statements will come directly from American Express.

4.8 Retrievals

A retrieval request occurs when a cardholder’s bank requests a legible copy of the sales draft used in a transaction. Retrieval requests are generated for a variety of reasons, including cardholder disputes, point-of-sale errors, fraud inquiries, etc.

To view Retrievals, click Retrievals on the Transaction Reports Main Menu. (Figure 4.1.2)

4.8.1 Retrievals Search Screen

To search for a retrieval, enter the date range or case number. (Figure 4.8.1)

The retrieval will populate below the search box. (Figure 4.8.2)
4.8.2 Retrieval Search Results Screen

To view a specific retrieval’s case click on the Case Number.

4.9 Chargebacks

A credit card transaction that is billed back to the merchant after the sale has been settled is called a chargeback. Chargebacks are initiated by the card issuer on behalf of the cardholder. Typical cardholder disputes involve product delivery failure or product/service dissatisfaction.

To view Chargebacks, click Chargebacks on the Transaction Reports Main Menu. (Figure 4.1.2)

4.9.1 Chargeback Search Screen

To search for a chargeback, enter the date range or case number. (Figure 4.9.1)

The chargeback search results will populate below the search box. (Figure 4.9.2)

4.9.2 Chargeback Search Results Screen

Click on Case Number to view a specific chargeback’s case details, case history, and the original transaction in question. (Figure 4.9.2)
4.9.3 Chargeback Details

5 Summary Reports

Core Management system provides merchants reports based on activity by day, month, or year, and transaction counts and dollar amounts.

To view Summary Reports, click on Summary Reports tab on the Transaction Reports Screen. (Figure 4.1.2)

5.1.1 Summary Reports Option Screen

To view reports for transaction counts and processing amounts click Volume and Transaction on the Summary Reports Option Screen. (Figure 5.1.1)

5.1.2 Volume and Transaction Options Screen

There are 4 pre-defined views available: Year, Month, Day, and Processing Detail (Figure 5.1.2)

5.2 Summary Reports by Year

To view volume and transactions data by year, click by Year on the Volume and Transaction Options Screen. (Figure 5.1.2)
5.2.1 Yearly Summary Screen

The yearly summary screen will display year over year transaction data, beginning the year that the merchant account was opened. (Figure 5.2.1)

To export the year over year transaction summary to Excel, click the CSV link in the actions box in the yearly summary screen. (Figure 5.2.1) The Excel download will then populate.

To view the year over year transaction summary in XML format, click the XML link in the actions box in the yearly summary screen. (Figure 5.2.1) A new window will populate with the XML data.

To print the year over year transaction summary, click the Print link in the actions box in the yearly summary screen. (Figure 5.2.1) A new window will populate with the data in a printer ready format.

To view the yearly data in chart view, click the Chart tab on the Yearly Summary Screen. (Figure 5.2.1) There are two available chart types to select: Transaction Type, and Amount.

5.2.2 Yearly Transaction Count Chart Screen
5.2.3 Yearly Transaction Amount Chart Screen

5.3 Summary Reports by Month
To view volume and transaction data by month, click by Month on the Volume and Transaction Options Screen. (Figure 5.1.2)
5.3.1 Monthly Volume and Transaction Volume

The Monthly Volume and Transaction summary screen will display month over month transaction data, beginning the year that the merchant account was opened. (Figure 5.3.1)

To export the month over month transaction summary to Excel, click the CSV link in the actions box in the Monthly Volume and Transaction summary screen. (Figure 5.3.1) The Excel download will then populate.

To view the month over month transaction summary in XML format, click the XML link in the actions box in the Monthly Volume and Transaction summary screen. (Figure 5.3.1) A new window will populate with the XML data.

To print the month over month transaction summary, click the Print link in the actions box in the Monthly Volume and Transaction summary screen. (Figure 5.3.1) A new window will populate with the data in a printer ready format.

To view the monthly volume and transaction data in chart view, click the Chart tab on the Monthly Volume and Transaction Summary Screen. (Figure 5.3.1) There are two available chart types to select: Transaction Type, and Amount.
5.3.2 Monthly Volume and Transaction Count Chart Screen

5.3.3 Monthly Volume and Transaction Amount Chart

5.4 Summary Reports by Day

To view volume and transaction data by day, click by Day on the Volume and Transaction Options Screen. (Figure 5.1.2)

The current month’s daily transaction summary will populate. (Figure 5.4.1)

To search for a specific date range, enter the date range in the search box.
5.4.1 Daily Volume and Transaction Summary Screen

To export the daily volume and transaction summary to Excel, click the CSV link in the search box in the Daily Volume and Transaction Summary Screen. (Figure 5.4.1) The Excel download will then populate.

To view the daily volume and transaction summary in XML format, click the XML link in the search box in the Daily Volume and Transaction Summary Screen. (Figure 5.4.1) A new window will populate with the XML data.

To print the daily volume and transaction summary, click the Print link in the search box in the Daily Volume and Transaction Summary Screen. (Figure 5.4.1) A new window will populate with the data in a printer ready format.

To view batch history, click on the Transaction Date in the Daily Volume and Transaction Summary Screen. (Figure 5.4.1) The batch history for the date selected will then populate. (Figure 5.4.2)

5.4.2 By Day - Batch History Screen

To view the daily volume and transaction data in chart view, click the Chart tab on the Daily Volume and Transaction Summary Screen. (Figure 5.4.1) There are two available chart types to select: Transaction Type, and Amount.
5.4.3 Daily Volume and Transaction Count Chart

5.4.4 Daily Volume and Transaction Amount Chart

5.5 Processing Detail

To view a detailed report of card types, charge types, processing fees, interchange, and assessments click on Processing Detail Volume and Transaction Options Screen. (Figure 5.1.2)

The current month’s processing detail summary will populate.

To search for a specific date range, enter the date range in the search box.
5.5.1 Processing Detail Screen

To export the processing detail to Excel, click the CSV link in the search box in the Processing Detail Screen. (Figure 5.5.1) The Excel download will then populate.

To view the processing detail in XML format, click the XML link in the search box in the Processing Detail Screen. (Figure 5.5.1) A new window will populate with the XML data.

To print the Processing Detail Screen, click the Print link in the search box in the Processing Detail Screen. (Figure 5.5.1) A new window will populate with the data in a printer ready format.

5.6 Activity Reports

To view transactions by card type, transaction type, transaction count, and processing amount click Activity Reports on the Summary Reports Option Screen. (Figure 5.1.1)

5.6.1 Activity Options Screen

There are 3 pre-defined views available: Current Year, Current Month, and Yesterday

5.7 Current Year

To view the current year activity, click Current Year on the Activity Options Screen. (Figure 5.6.1)

The current year’s activity will populate. (Figure 5.7.1)

To change the year, select the desired date range in the Date Range dropdown box.
5.7.1 Current Year Activity Screen

To export the current yearly activity to Excel, click the CSV link in the Current Year Activity Screen. (Figure 5.7.1) The Excel download will then populate.

To view the current yearly activity in XML format, click the XML link in the Current Year Activity Screen. (Figure 5.7.1) A new window will populate with the XML data.

To print the yearly activity, click the Print link in the search box in the Current Year Activity Screen. (Figure 5.7.1) A new window will populate with the data in a printer ready format.

To view the yearly activity data in chart view, click the Chart tab on the Current Year Activity Screen. (Figure 5.7.1) There are two available chart types to select: Transaction Type, and Card Type.

5.7.2 Current Year Transaction Type Activity Chart
5.7.3 Current Year Card Type Activity Chart

5.8 Current Month

To view the current month’s activity, click Current Month on the Activity Options Screen. (Figure 5.6.1) The current month’s activity will populate. (Figure 5.8.1)

To change the month, select the desired date range in the Date Range dropdown box.

5.8.1 Current Month Activity Screen

To export the current monthly activity to Excel, click the CSV link in the Current Month Activity Screen. (Figure 5.8.1) The Excel download will then populate.

To view the current monthly activity in XML format, click the XML link in the Current Month Activity Screen. (Figure 5.8.1) A new window will populate with the XML data.

To print the monthly activity, click the Print link in the search box in the Current Month Activity Screen. (Figure 5.8.1) A new window will populate with the data in a printer ready format.
To view the monthly activity data in chart view, click the Chart tab on the Current Month Activity Screen. (Figure 5.8.1) There are two available chart types to select: Transaction Type, and Card Type.

5.8.2 Current Month Transaction Type Chart

5.8.3 Current Month Card Type Chart

5.9 Yesterday

To view a specific day’s activity, click Yesterday on the Activity Options Screen. (Figure 5.6.1) Yesterday’s activity will populate.
To change the day, select the desired date in the Date Range box.

5.9.1 Yesterday Activity Screen

To export yesterday’s activity to Excel; click the CSV link in the Yesterday Activity Screen. (Figure 5.9.1) The Excel download will then populate.

To view yesterday’s activity in XML format; click the XML link in the Yesterday Activity Screen. (Figure 5.9.1) A new window will populate with the XML data.

To print yesterday’s activity; click the Print link in the search box in the Yesterday Activity Screen. (Figure 5.9.1) A new window will populate with the data in a printer ready format.

To view yesterday’s data in chart view; click the Chart tab on the Yesterday Activity Screen. (Figure 5.9.1) There are two available chart types to select: Transaction Type, and Card Type.

5.9.1 Yesterday Transaction Type Chart
5.9.2 Yesterday Card Type Chart

6 Sub-Users

Users have the ability to create additional users (sub-users) under their main account. Sub-users will login using their own username and password.

To add a sub-user, click on the My Account tab (Figure 6.1.1), then click on the Sub-Users link. If you do not see the Sub-Users link, please contact customer care to request access.

6.1.1 My Account Tab

6.2 Adding a Sub-User

Click Add Sub-User on the left hand side navigation menu. The Add Sub-User screen will then populate. (Figure 6.2.1) The red asterisks on the screen indicate a required field. The required fields are: First
Name, Last Name, and Email. The email address provided is where the sub-user’s login information is sent.

After the sub-user information is entered, select the user privileges. A sub-user can have multiple permissions assigned to them.

- **Virtual Terminal**: Grants access to Virtual Terminal credit card processing
- **Virtual Terminal - Check**: Grants access to Virtual Terminal check processing only
- **Virtual Terminal - Scheduled Transactions**: Grants access to Virtual Terminal Scheduled Transactions only
- **Core Reporting**: Grants access to Core Reporting only

Once the sub-user information and permissions have been completed, click Save. A confirmation line will appear saying that login information has been emailed to the sub-user.

### 6.2.1 Add Sub-User Screen

#### 6.3 Searching for a Sub-User

To search for sub-users, enter the necessary search criteria and click Search. You can search for sub-users by their username, name, email address, and account status. To search for all users, do not enter any search criteria.
Sub-users will appear below the search criteria fields.

6.3.1  Sub-User Search Screen

![Sub-User Search Screen](image)

6.4  Editing a Sub-User

To edit a sub-user, click View next to the username on the search screen. (Figure 6.3.1) The sub-users information will then populate (Figure 6.4.1). Click Edit on the upper right hand side to edit the sub-users information.

6.4.1  Sub-User Information Screen

![Sub-User Information Screen](image)

You can edit the sub-users name, contact information, privileges, and status. (Figure 6.4.2)

If the Active box is unchecked the sub-user will be marked as inactive and will be unable to log into Core Management System.
Click Save to update the changes, or Cancel to return to the previous screen.

6.4.2 Edit Sub-User Screen

6.5 Unlocking a Sub-User
As a security feature of Core Management System, users are automatically locked out of their account if they try to login with an incorrect password more than three times.

If a user is locked out, on the search screen (Figure 6.3.1) the locked checkbox will be checked. To unlock the sub-user, you will need to go into their account and click Unlock. (Figure 6.5.1)

6.5.1 Unlocking a Sub-User Screen

6.6 Re-setting a Sub-Users Password
Click Reset Password (Figure 6.5.1), the user will receive an email with a system generated temporary password. The sub-user will be required to enter a new password when they login again.

6.7 Removing a Sub-User
To remove a sub-user’s entire access from Core Management System uncheck the Active box on the Edit User Screen (Figure 6.4.2).