

Dispute Manager

Merchant Quick Reference Guide

Overview

DISPUTE MANAGER is a web-enabled front-end user interface that helps merchants effectively manage sales disputes. Dispute Manager is an easy way for merchants to manage and respond to sales disputes (chargebacks and retrievals) via a highly secure web interface. Dispute Manager provides dispute data and enables merchants to exchange information and documentation to efficiently respond to dispute items. **Please note that effective April 2018, you must respond to all chargebacks, regardless of whether you are accepting liability or not.** This Quick Reference Guide is a supplement to the Dispute Manager User Guide.

Quick Reference Tips

The following tips serve as a basic introduction of the capabilities available with Dispute Manager:

How to access or sign up for Dispute Manager on the Business Track Portal	Dispute Manager – Online Dispute Management Other Dispute Tools: • ClientLine- view chargeback and retrieval history and run reports • Alerts – Sign up to receive email notifications for Dispute activities	If you are currently a Business Track user, access Dispute Manager from the Business Track page. Log in to www.businesstrack.com and select “Dispute Manager” from the Applications drop down. If you are not currently a Business Track user, click “enroll” and follow the steps. Helpful Hint- Sign up for “Self-enroll for Alerts” in Business Track to receive notifications of new incoming chargebacks or retrievals by email.
Helpful reference tools on how to use Dispute Manager and manage disputes	Welcome tab overview: Review the information in the User Guide and Merchant Dispute Guide from the Quick Links section of the Welcome Tab	Reference the Welcome Screen and Quick Links section of Dispute Manager Recommendation: Open and refer to the Dispute Manager User Guide as you work through the Dispute Manager screens and this Quick Reference Guide. Quick Links: • Dispute Manager User Guide • Dispute Guide (Dispute Best Practices) • Retrieval and Chargeback Listing • Schedule Maintenance Outage • Online Help (more detailed than the Dispute Guide) • Demo Bulletins: • Important News and Updates Dispute Manager Demonstration: • https://www.firstdataclients.com/dmdemo/login.htm (please note the technical requirements below)
Getting Started: How to locate new incoming chargebacks	Queues tab overview	Click the Queue tab on the top toolbar and select “All Chargebacks/Exceptions” under Queue Selector by clicking the green arrow. This will list all open cases pending your response. Incoming Retrievals can be found in the “All Retrievals” queue. To open a case, click on the red asterisk (new cases) or the green arrow to the left of the case (cases that may have been reviewed but not responded to).

		There are three options located on the bottom toolbar to view your disputes - Case View, Merchant View and Transaction View. Other common queue selection: All Retrieval Alerts” and “All Chargeback Alerts” • IMPORTANT: These queues notify you that responses you previously provided were incorrect or incomplete. Review these cases to assure responses are corrected, updated and fulfilled. Check the Output Package folder located in each case for additional information. Reference the <i>Queues screen</i> section of the user guide for more details.
Managing your Disputes	Case tab overview	The <i>Cases screen</i> provides all detailed documentation and information related to the investigation of cases. The Case Files section allows the user the view documentation related to the case. The documentation is separated by: • Merchant Supplied folder – Includes documentation supplied to Merchant Services from the Merchant. • Output Package folder – Includes documentation from Merchant Services that applies to the case. • Merchant Supplied folder – Includes documentation supplied to Merchant Services from the Merchant
	Research and Respond: Effective April 2018 you must respond to all chargebacks, even on cases where you accept liability. To easily accomplish accepting cases that you are not going to provide a response to, you may select chargeback(s), (up to 50 cases at a time), by dollar amount or reason code and select “Accept Chargeback”. The case will be removed from the Chargeback Queue Worklist and your ‘accept’ response will be sent to Merchant Services.	There are five different tabs on the <i>Cases screen</i> that allow you to investigate and/or resolve the cases. 1. User Notes: Allows for internal notes only 2. Trans/Credit: The Trans/Credit tab displays all transaction (sale or credit) information for the last 6 months that is related to the same credit card number and merchant number of the dispute. Use this tab to verify if you have already issued a credit to your customer’s account for their dispute, or if there is a duplicate transaction. 3. Auth Records: The Auth Records information can be used to research a chargeback or reversal case, which is related to an authorization or fraud related chargeback reason code. 4. Actions: This is where you respond to a case. Commonly selected actions include Dispute/Reverse Chargeback or Accept Chargeback. When disputing a chargeback, select the document(s) that support your case, attach scanned images and include any User notes to support your case. 5. Messages: Used to communicate within your own internal merchant areas. Using this option does not send a response back to Merchant Services and the case will remain in the Chargeback Queue Worklist. These can be used to research the message history of a chargeback or retrieval case. The Messages are listed in most recent order. Reference the <i>Cases screen</i> section of the user guide

Making the Most of Dispute Manager	Best Practices	Reference the <i>Merchant Dispute Guide</i> from the <i>Quick Link</i> section of the <i>Welcome Page</i> for: • Reason code descriptions • How to Avoid Disputes – best practices • How to Defend – what documentation to respond with • Frequently asked questions and scenario examples Online Help: Take full advantage of the Online Help functionality. Access Online Help directly if you need assistance with navigating within Dispute Manager or click on the question mark icons  located through the tool for instant reference. Reference <i>User Best Practices</i> section of the user guide
Dispute Manager Technical Requirements	Technical Requirements	For optimal use of Dispute Manager, users need to meet the following requirements: • Preferred browsers: Google Chrome or Mozilla Firefox • Internet Explorer requires JAVA 1.6 with Compatibility Mode disabled • Users may use Java (version 6, update 80 or later) or HTML to view images or upload documents • Images can be imported to Dispute Manager as .tiff, .gif, .pdf, .bmp, .jpeg or .jpg files ▪ Resolution: 200 dpi ▪ Color: black and white only ▪ Size: 8 ½ x 11 inches (portrait)

If you have any questions or need help with user IDs, passwords and system navigation, please contact our Technical Support Help Desk at **800.285.3978**.