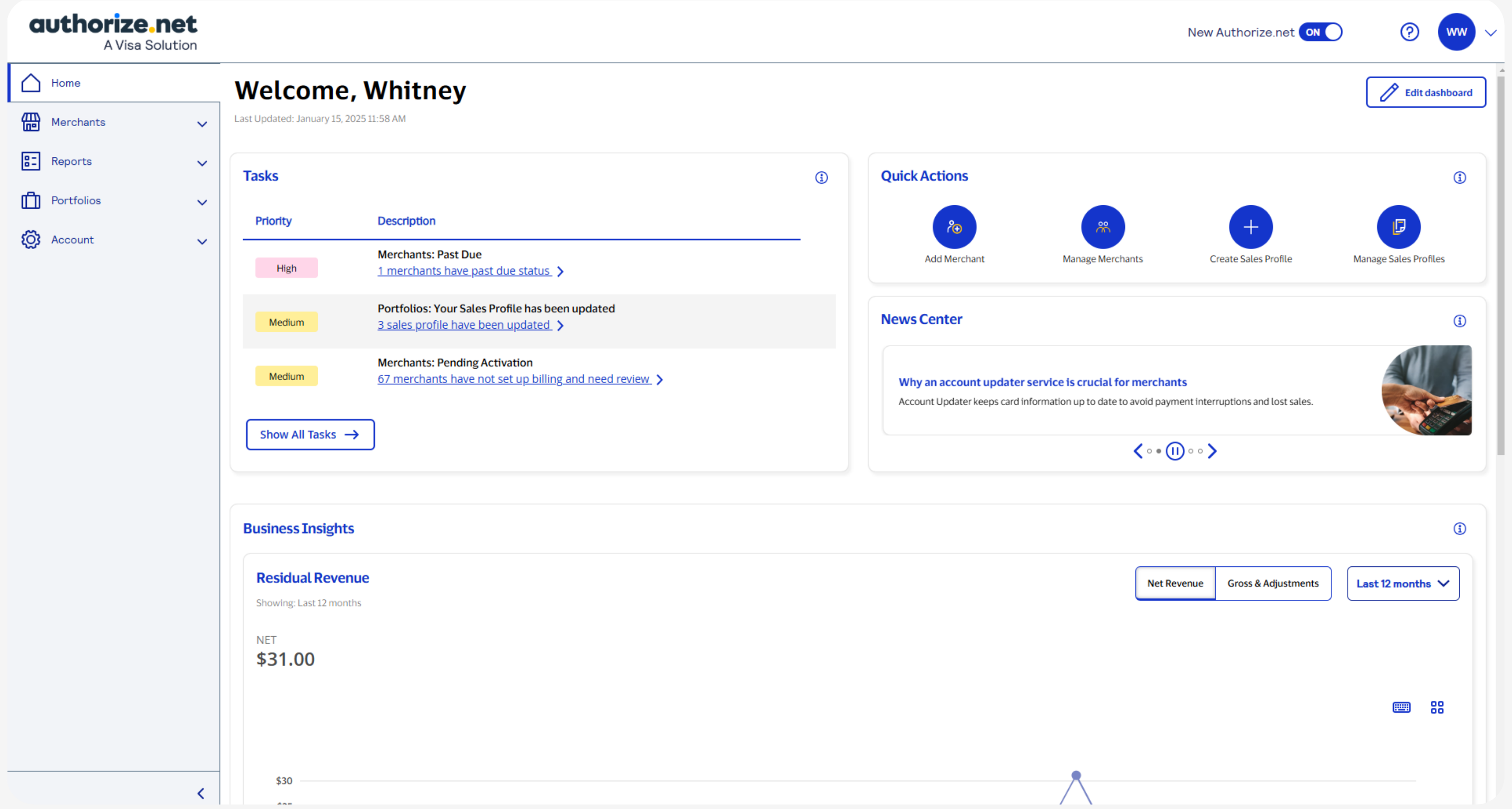
Quick start guide

authorize.net
A Visa Solution

Online help for partners

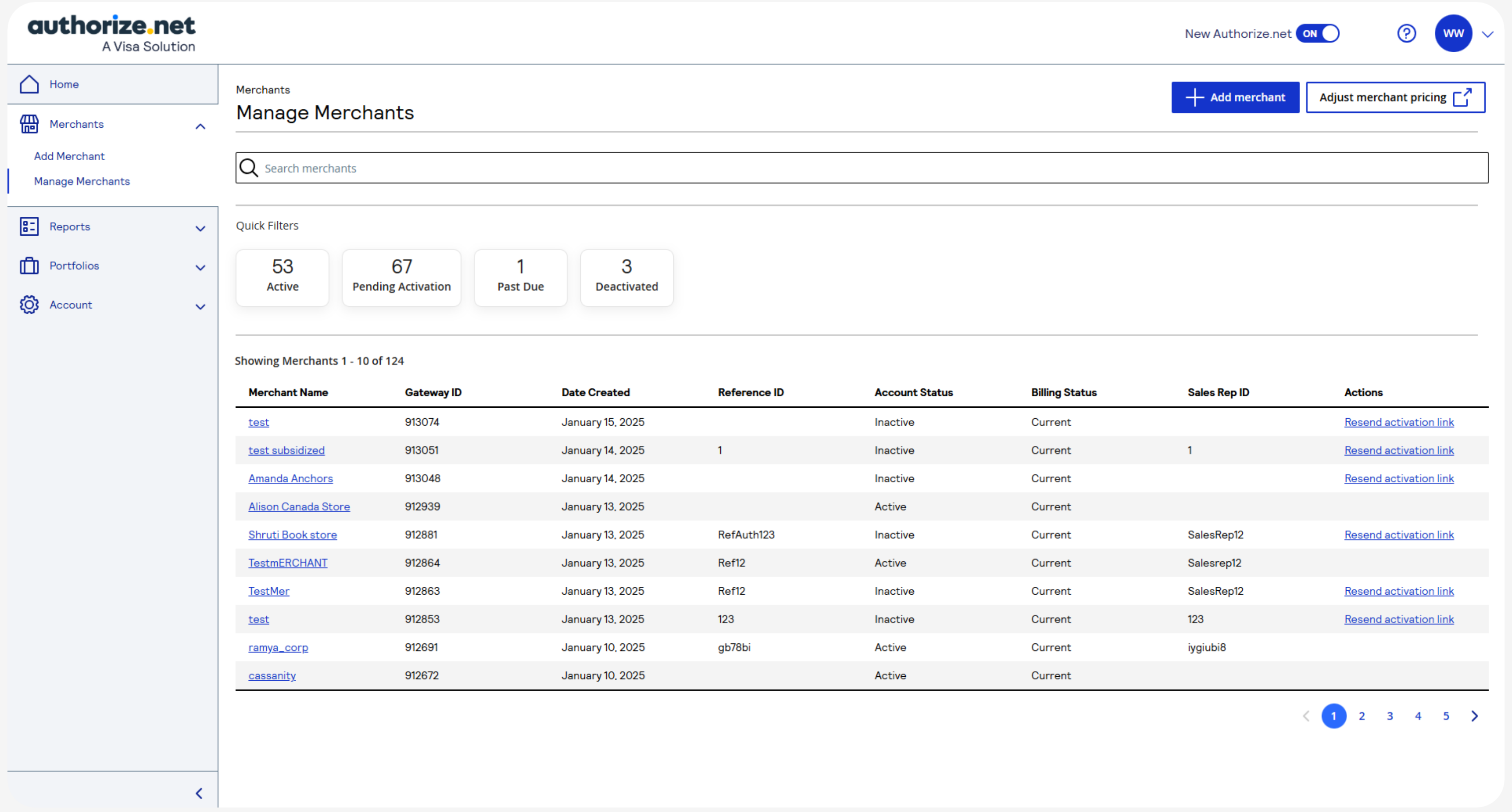
The dashboard offers an overview of key functionalities:

- Quick actions: Access workspaces where you can add and manage merchants and create and manage sales profiles.
- Business insights: View customizable business metrics and trends, including net and gross residual revenue over the last 12, 24, and 36 months and the status of merchants (active, never been activated, past due, and deactivated).
- News center: Stay updated with recent product announcements and marketing tips to help grow your business.
- Tasks: Review and act on current tasks from the last six months, including managing merchants and addressing past due accounts.
- Need help?: Contact the Support Center, access updated product documentation, or share feedback directly with our team. Toggle between the New Authorize.net and Classic experiences at your convenience.



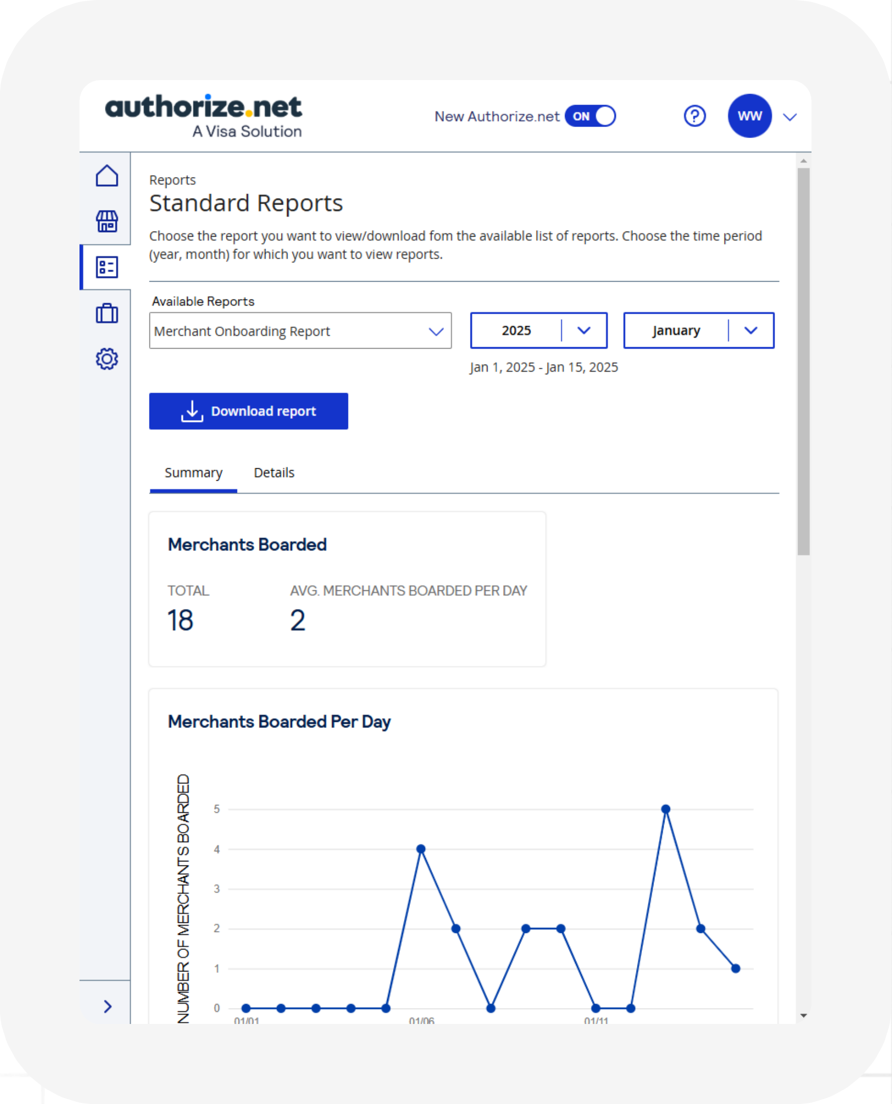
The merchant workspace enables efficient account management:

- Add a merchant: Revamped boarding flow that allows you to select a sales profile, enter merchant account information, add location and owner information, configure card processing information, configure card processing and fraud detection settings, and confirm merchant information.
- Manage merchants: View and edit merchant configurations, including account information, product pricing, and processor settings. You can also search for merchants by name, gateway ID, or reference ID; and adjust pricing.
- Quick search and filters: Find and manage merchants based on criteria like active, pending activation, past due, and deactivated.



The reports workspace has detailed insights into merchant activities:

- Summary tabs: Highlight key metrics.
- Details tabs: Present individual merchant information.
- Residual reports: View breakdowns and summaries of monthly residual earnings, including gross residuals by fee type and top residual generators.
- Past due merchant reports: Analyze merchants with unpaid balances, including billing status and past due amounts.
- Pending activation reports: Track merchants that have been boarded but not yet activated.
- Merchant details reports: Gain insights into your customer base with detailed merchant information.
- Merchant processing reports: Monitor transaction counts and volumes across different products.
- Merchant onboarding reports: Review insights into newly boarded merchants.



The Portfolio and Account workspaces help you manage sales profiles and user accounts:

- Portfolios: Create and manage merchant sales profiles, set products and pricing, and edit existing profiles. Tasks include creating sales profiles, setting sell rates and supported products, and managing existing sales profiles. Note: creating sales profiles is limited to users in the Administrator role.
- Account: Manage user profiles, roles, permissions, and notification settings. Tasks include viewing and editing profile details, changing passwords, adding and managing users, creating OAuth applications, generating API keys, and updating billing and payout information.