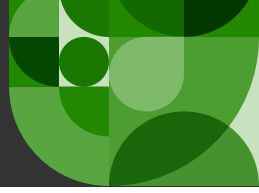


# Support Guide



## Support Resources and Teams:

### Copilot Tickets

You can create Copilot tickets on behalf of a merchant. These tickets will route to the appropriate support teams. To reply to a ticket response or to re-open a closed ticket, comment on the ticket and the individual assigned will receive a notification.

### CardPointe Tickets - Merchant Self Service

Merchants can create their own support tickets in CardPointe under the "Support" tab. These tickets will show in Copilot as well, so you will have visibility of them.

### Phone Support

**ISV Partner Support:** 484-581-7690 (8:30am – 8:00pm EST)

- This team is a resource for you if I am ever out of the office

**General Merchant Support:** 877-828-0720 (24-hour support)

**CardPointe Technical Support:** 877-828-0720 + say "CardPointe" when prompted (24-hour support)

- **After Hours Support:** Calls made after hours will be handled by our 3rd party support team. If your merchant is experiencing a critical service issue, they will receive a call back from a CardPointe Support team member within an hour.

### Email Support

The CardPointe Support team maintains the CardPointe Support email account [cardpointesupport@fiserv.com](mailto:cardpointesupport@fiserv.com), which exists for merchant and sales partner support issues, device tracking and demo requests. General requests received by 5:00 PM EST will receive same day response. The inbox is monitored for escalated support issues after hours.

## Escalations:

### Account Manager and ISV Support

To escalate a merchant issue in urgent or complex matters, please email your Account Manager with all relevant details. **\*\*Please do not share this email address directly with merchants.\*\*** In the event that your Account Manager is out of office, please email [isvsupport@cardconnect.com](mailto:isvsupport@cardconnect.com) or call 484-580-7690 to speak with ISV Support.

## Notifications and Alerts:

### Sign Up for Copilot Notifications

On the Copilot Dashboard, locate the "Users" tab on the horizontal menu. Then click "Notifications" to customize the settings. We typically recommend turning on "Tickets" and "Account Status."

Sales Code ▾	Descriptor ▾	Tickets ▾	Account Status ▾	Daily Summary ▾	Deposit Warnings ▾	Equipment ▾
ISVD	ISV Demo - Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Tickets:** This will alert you for tickets created by merchants, members of your team, or internal Clover Connect teams.

**Account Status:** This will send updates as accounts change Underwriting/Boarded statuses.

**Daily Summary:** I would not advise to turn this on. This will give daily deposit summaries.

**Deposit Warnings:** This will give warnings of ACH Rejects.

**Equipment:** This will send equipment order updates

## **Subscribe to Status Updates for CardPointe Systems**

status.cardconnect.com – Click “Subscribe to Updates” in the upper righthand corner.

## **Service Level Agreements:**

*Clover Connect's Service Level Agreements ("SLAs") relate to our standard operating procedures. This outline is meant to be a partner guide to help you understand our process so that you may set appropriate expectations with your customers.*

### **Merchant Support**

**Same Day** (ticket requests submitted by 5:00pm EST):

- ABA/DDA (bank account) changes
- Datawire/Apriva requests
- Entitlement updates
- AMEX conversions (on first of the month)
- Email inquiries

**1 Business Day Turnaround:**

- Demographic changes
- DBA name change
- Deposit/transaction assistance
- Authorization logs/full card number requests
- Seasonal holds
- MCC/Sic updates

**2-3 Business Day Turnaround:**

- Legal name/Tax ID updates
- PCI requests
- Online reporting requests
- Rate reviews (pricing will be updated by current EOM)

**5 Business Day Turnaround:**

- Pricing updates

**5+ Business Day Turnaround:**

- Research requests (missing deposits, chargebacks, etc.)
- Gift cards
- BUW

### **Boarding**

**Account Boarding:** Applications will be boarded within 1 business day of approval

**North Bridge and Omaha Back End:** Up to 3 business days SLA from platform

**Clover Requests:** Clover Orders not including menu build/Pin Debit pends are 24 hours to place the order with TASQ always sent Overnight Shipping but can be delayed due to the pandemic

**Telecheck:** 3-5 business days

**Bypass TIDs:** 2-3 business days

**Payeezy:** Customer receives credentials via email within 48 hours after request submission

**WEX/Voyager Full Acquiring (existing accounts):** 2-3 business days

**WEX Pass-thru:** 15 business days

**VAR Sheets (excluding Bypass):** 1 business day

*We are however experiencing some extended SLAs in these areas.*

**Bank changes:** 5-7 business days

**Research request:** 5-10 business days

**Deposit transaction:** 3-4 business days

## **Gateway Support**

**Same Day/1 Business Day Turnround** (ticket requests submitted by 3:00pm EST):

- CardPointe Gateway only setup
- CardPointe password/registration request
- Production credentials

**1-3 Business Days Turnaround:**

- CardPointe Terminal/Gateway support
- CardPointe Gateway activation/setup
- Device troubleshooting
- CoPilot/CardPointe linking
- ACH Powered by ProfitStars
- CardPointe HPP
- Hosted Payment Page Inquiry
- Gateway API Welcome Email
- InStore POS
- Magento
- WooCommerce
- Enable NFC (internal use only)

**3+ Business Days Turnaround:**

- Tickets involving complex research with processor or Tier 2 team

## **Underwriting:**

### **Application Submissions**

Applications submitted before 4:00 PM EST (excluding weekends):

- **If auto-decided**, account status will be updated within 24 hours from after application submission.
- **If account falls into Manual Underwriting**, account status will be updated in 7+ business days.

Underwriting will review the application for completeness as well and perform their due diligence on the account in order to make the decision to Approve, Pend, or Decline.

## ***Pended Applications***

If an account is pended due to credit/fraud risk or incompleteness, Underwriting will create a Copilot ticket for the Pended account. The ticket will include an explanation and request for missing/necessary information or documentation to allow for a decision on the account.

### **Top Reasons Applications Are Pended:**

- Federal Tax ID does not match the IRSdatabase
- Business does not verify at the physical location
- Poor/weak personal credit (banking/financial request)
- High risk/high volume merchants (processing history request)
- Missing Voided Check
- Missing Equipment type

## ***Underwriting Tickets***

You may choose to utilize a Clover Connect Sales Operations Coordinator (SOC) to reach out to merchants for supplemental information needed for Pended Accounts. For ticket responses submitted before 4:00PM EST, the ticket will be acknowledged within 24 hours (excluding Saturday and Sunday.) Once the recipient of the ticket has responded with the needed information or documentation, the underwriter will comment and close the ticket provided there is nothing left outstanding in the ticket request and they have no additional requests. The underwriter will provide the decision to Approve or Decline within 24 hours.

## **Boarding:**

### ***Account Boarding***

Applications will be boarded within 24 hours of approval. Please be advised that in times of high application volume, boarding time may exceed 24 hours.

### ***Boarding Tickets***

General Boarding tickets are updated within 24 hours of submission. Tickets relating to new applications are reviewed by a Boarding Representative when the account is worked.

### ***CardPointe Equipment Orders***

General Boarding tickets are updated within 24 hours of submission. Tickets relating to new applications are reviewed by a Boarding Representative when the account is worked.

- Equipment Orders placed in Copilot before 4PM EST will be placed with our vendor within 1 business day
- Ingenico will provision terminal orders within 2-3 business days
- Ingenico will ship terminal orders on day provisioned as an overnight delivery
- CardPointe Mobile and Virtual terminal card readers ship from the corporate office within 2-3 business days from when the order is received
- Approved rush orders for merchants that are currently in need of an overnight delivery will ship same day from the corporate office if received by 4 PM EST. Overnight shipping charges may apply.