



Getting Started



WELCOME CHECKLIST

Welcome to Clearent! Thank you for choosing us as your payment processing partner.

HERE'S HOW TO GET STARTED

1. Set up your equipment

A Clearent Representative will contact you to make sure your terminal or card reader is working properly and see if it needs to be reprogrammed.

2. Log in to Compass

Watch for an email with details on how to access Compass, our online reporting tool. Compass makes it fast and easy to manage your transactions, batches, and fees. Once you create your username and password, verify that we have your correct business information in order to help prevent backup withholding from the IRS. Learn more at clearent.com/IRS.

3. Take your PCI questionnaire & run any required network scans

Compliance with the Payment Card Industry Data Security Standards (PCI DSS) is one of the best ways to protect your business and your customers from a data breach and the severe financial loss that often accompanies these events.

You have until the second-to-last business day of the first full billing cycle after you become a Clearent customer to complete the mandatory questionnaire located in Compass. You must also schedule and run any required quarterly network vulnerability scans.

WANT TO LEARN MORE?

Visit clearent.com/merchantagreement

4. Read the Quick Reference Guide

The Quick Reference Guide includes step-by-step instructions for how to use your new equipment.

5. Display your decals

Display your American Express, Discover, Mastercard and Visa decals on your door or window to welcome more customers.

6. Keep our contact info handy

Attach the sticker with your account information to your terminal or computer. This will help us serve you faster if you have a question.

WANT TO LEARN MORE?

Visit clearent.com/merchantagreement

for more information about processing transactions with Clearent.



STAY PCI COMPLIANT

Did you know more than 80% of data breaches target small businesses? Compliance with the Payment Card Industry Data Security Standards (PCI DSS) can protect your business and your customers.

How to Achieve PCI Compliance

Complete
Annual
Self-Assessment
Questionnaire



Pass
Quarterly
Network Scans
(if required)



PCI
Compliance

The PCI DSS apply to any organization that stores, processes and/or transmits cardholder data. If your business accepts credit cards, then these standards apply to you.

If your business is required to complete quarterly network scans you must run and pass these scans in order to avoid the PCI Non-Compliance fee.

You have been automatically enrolled in Clearent's DataGuardian compliance and security program, which makes PCI compliance fast and easy. With the program, you get a \$100,000 Data Breach Protection Policy, access to easy-to-follow questionnaires, network scanning tools to help you regularly monitor and protect your business, and valuable educational resources.



TAKE YOUR PCI QUESTIONNAIRE & RUN ANY REQUIRED SCANS

You have until the second-to-last business day of the first full billing cycle after your account was set up to complete your mandatory questionnaire and run and pass any required network vulnerability scans.

Follow the steps below to avoid a monthly PCI Non-Compliance fee.

COMPLETE YOUR PCI QUESTIONNAIRE:

1. Log in to Compass at <https://myclearent.net/ui>.
2. Click the **Arrow** icon in the PCI section at the top of your dashboard. This will take you to the *DataGuardian* portal.
3. Click on the **Get Started** button.
4. Verify the contact information listed.
5. Use the Questionnaire Selection Wizard to complete the appropriate questionnaire. You will instantly find out your PCI compliance status.
6. Schedule and run any required quarterly scans. If your business is required to complete quarterly scans you must run and pass these scans in order to avoid being charged a PCI Non-Compliance fee.
7. Review and electronically sign your certification.

DID YOU MISS THE DEADLINE?

Don't worry! As soon as you complete your questionnaire and run and pass any required scans, the PCI Non-Compliance fee will be removed starting with the next billing cycle.

QUESTIONS ABOUT PCI COMPLIANCE?

Call the PCI Help Desk: **855.864.1732**

clearent.com/DataGuardian | clearent.com/PCI



WELCOME MORE CUSTOMERS



61% of consumers surveyed report they're more likely to make a purchase from a small merchant when they see that their payment method is accepted.¹

Display your free decals

Add your free credit card brand decals to your window, door or sales register today and you'll show Card Members they're welcome at your business! It's an easy way to attract new customers and boost your sales.



The advantage of free marketing supplies

Did you know that American Express offers free signage and supplies at americanexpress.com/signage/? From window decals and counter signs, to invoice labels and check presenters – you'll find an array of materials to offset business costs and make sure Card Members feel welcome. And the best part is that it's all free!

¹ American Express commissioned internet panel survey conducted in April 2017 based on purchases made at small merchants in the 3 months prior to the survey. "Consumers surveyed" consists of survey respondents who typically look on the front door or window to see whether or not their payment method is accepted when making purchases from small merchants and who either (1) reported that they have an American Express card and used that card to make purchases at small merchants in the prior 3 months; or (2) reported that they do not have an American Express card and used Visa, MasterCard, a debit card, or payment services to make purchases at small merchants in the prior 3 months.



CONNECT WITH US

Thanks again for choosing Clearent as your payments partner.

Follow us for payments industry insights to help you grow your business.



clearent.com/blog



facebook.com/GoClearent



twitter.com/GoClearent



linkedin.com/company/clearent



youtube.com/GoClearent



CONTACT INFORMATION

Clearent Customer Support:

866.435.0666 | customersupport@clearent.com

7 a.m. – 11 p.m. Central, 7 days a week

QUESTIONS ABOUT:

- Statements
- Billing questions
- Chargeback/dispute questions
- Batch issues
- Account changes (except pricing)

For specific questions related to the use and features of your third party software platform, please call your software provider or developer first. If you still need assistance, feel free to contact Clearent. We are here to help!

PCI Help Desk:

855.864.1732

7 a.m. – 7 p.m. Central, Monday-Friday

QUESTIONS ABOUT:

- PCI compliance
- Completing your annual self-assessment questionnaire
- Running quarterly network vulnerability scans (if required)

Place Sticker Here

