AccountNet

ACCESS REQUEST FORM

To	IT Department	**From**	
Fax	**312.564.3201**	**Phone**	
Date		**Requestor Email**	

Step 1: Fill out the user/company information

User IDs will be assigned by PayLink. Please write legibly.

User's First Name ____________________ **User's Last Name** ____________________

Company Name ____________________ **User's Email** ____________________

Type of Business **DEALERSHIP** ☐ ***Add User*** ☐ ***Existing User***** ☐ ***De-Activate User***

***By selecting Existing User, we will ADD the items marked in Step 2 and/or Step 3 to the existing Users access. If you wish to remove a report or permission from the User's access, write REMOVE next to the item.*

****Through submission of this form to PayLink, by signing below the manager hereby seeks security access rights to PayLink's AccountNet application for the individual named above ("User"). As such, the manager accepts responsibility for all on-going access needs of User including, but not limited to, modification or termination of User access where applicable. Communications for such requests should be promptly directed to PayLink's Client Services Department at 312-261-4801.****

Step 2: Specify account adjustment permissions

Check the yes or no box

Allow to make **Credit Card** & **Check-by-Web** Payments on **Active** accounts	☐ **YES**	☐ **NO**	Allow to submit a **Company Cancel Date** to include Uploading Cancels in a Batch	☐ **YES**	☐ **NO**
Allow to submit a **Change to the Payment Due Date**	☐ **YES**	☐ **NO**	Allow access to Seller/Admin **Funding Information Tab**	☐ **YES**	☐ **NO**

Step 3: Specify reporting access

Check the box to allow report access

☐ **Agency Bookings Report**	*Shows all bookings by month for the past six months broken down by Business & Agent*
☐ **Cancel Analysis Matrix**	*Shows total contract bookings, non-pay cancellations & company cancels by quarter*
☐ **Cancel Pie Charts**	*Shows a graphical snapshot of contracts booked inception to date by account status*
☐ **Cancelled/Reinstated Report**	*Shows all contracts non-pay cancelled, company cancelled or reinstated within a specified date range*
☐ **Company Cancelled Report**	*Shows all Company Cancels by month for the past 6 months broken down by Business & Agent*
☐ **Contract Revision Report**	*Shows all contract revisions submitted within a specified date range*
☐ **Credit Card Decline Report**	*Shows all declined credit card transactions within a specified date range*
☐ **Credit Card Expiration Report**	*Shows all accounts where the Credit Card Expiration Date is within a specified date range*
☐ **Customer Request Cancel Pending**	*Shows all accounts where the consumer is in the process of cancelling coverage; the billing account has been flagged*
☐ **Customer Undeliverable Address**	*Shows all bad address accounts with history of letters or bills attempted by date range.*
☐ **Delinquency Report**	*Shows all accounts that are 1 - 30 days delinquent - based on the next due date*
☐ **Disbursement Report**	*Shows a detail of Disbursements on all accounts within a specified date range*
☐ **First Pay Cancels Report**	*Shows all accounts with Cancel Dates by month for the past 6 months broken down by Business & Agent*
☐ **Letter History Report**	*Shows all accounts with history of letters or bills sent to consumer by date range*
☐ **New Business Details Report**	*Shows all accounts created within a specified date range*
☐ **New Business Summary Report**	*Shows total counts & averages based on accounts that were booked within a specified date range*
☐ **NSF Report**	*Shows all ACH transactions and checks that NSF'd within a specified date range*
☐ **Payment History Report**	*Shows all payments made within a specified date range (1 month range maximum)*
☐ **Payments By Web Report**	*Shows all accounts that made a web payment within a specified data range*
☐ **Pending Cancellations Report**	*Shows all accounts with no Company Cancel Date that have a Non-Pay Cancel Date in the next 1 - 30 days*
☐ **Prenote Declines Report**	*Shows all accounts where a pre-note was returned due to invalid ACH information*
☐ **Receivable Outstanding Report**	*Shows all outstanding receivables, includes current (pending funding) & company cancelled accounts*

Step 4: Sign & Fax to PayLink @ 312.564.3201 or email: ANRequest@paylinkdirect.com

Manager's Signature ***	**Manager's Name *****	**Date**

If you have any questions, please contact our Client Services Department at 312.261.4801

FOR INTERNAL USE ONLY: ☐ ____________ ☐ ____________ ☐ ____________ *DDC:______ Initials______*

Last updated: 10/12