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Purpose

The purpose of this Guide is to provide instructions for using the CMU to:

- Maintain EDS Premier Designated Billing Account
- Enable Custom Payee Endorsements to use the Account Level Name instead of Customer Name
- Enable Auto-populate (Intelikey) functionality for Item Level Custom Fields
- Disable Smart Client Batch Ticket functionality.
Accessing the CMU

To access the CMU go to the EDS Premier Dashboard Menu, and select the CMU - Configuration Manager Utility menu item.

The following pop-up will display as the application is being launched.

Note: the pop-up box below will disappear and a few seconds may pass before the Main CMU application window is visible.
The Main Application window will be displayed.
Finding a EDS Customer

To find an EDS Customer **CLICK** on **MERCHANTS** from the menu on the left of the main application window. This will display a Merchant List box as well as all of the Merchant Profile tabs.
Scroll through the list of merchants on the left, or enter the first few characters of the customer name into the input box labeled “Click here to filter rows”. CLICK on the desired customer name to select and the page will be updated to display the Customer’s General Profile information.
Maintaining the EDS Premier Designated Billing Account

Locate the desired Merchant in the Merchant List dropdown and select.
CLICK the BILLING PROFILE TAB.
When the Customer's Billing Profile page is displayed, **ENTER/UPDATE** the **Merchant Billing Account** at the top of the page. **CLICK SAVE** at the bottom of the page to retain the changes.
Enabling a Custom Payee Endorsement

Locate the desired Merchant in the Merchant List dropdown and select.
Scroll down to the bottom of the Customer’s **GENERAL PROFILE** page to locate the section titled: **PAYEE ENDORSEMENT**.
**CLICK** on the **CUSTOM** radio button to enable the custom endorsement. The endorsement fields will be blank. Complete the fields as indicated below. Click the **SAVE** button at the bottom of the page after completing the input for each field, or after a maximum of 3 fields.

**Note:** If you wait to save until the input for all fields is complete you may receive an error message indicating the Merchant can’t be updated. If you receive this error try again, saving after each field is entered. Also, the tab key will not advance the cursor to the next field, each field will need to be clicked to select.

<table>
<thead>
<tr>
<th>Custom Payee Endorsement – Account Level Setup Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HORIZONTAL LOCATION</strong></td>
</tr>
<tr>
<td>80</td>
</tr>
<tr>
<td><strong>ENDORSEMENT LINE 1</strong></td>
</tr>
<tr>
<td>Pay to the order of Bank of the West</td>
</tr>
<tr>
<td><strong>ENDORSEMENT LINE 2</strong></td>
</tr>
<tr>
<td>For Deposit Only 121100872</td>
</tr>
<tr>
<td><strong>ENDORSEMENT LINE 3</strong></td>
</tr>
<tr>
<td>&lt;account description&gt;</td>
</tr>
<tr>
<td><strong>ENDORSEMENT LINE 4</strong></td>
</tr>
<tr>
<td>Acct#: &lt;account&gt;</td>
</tr>
<tr>
<td><strong>FONT TYPE</strong></td>
</tr>
<tr>
<td>Microsoft Sans Serif</td>
</tr>
<tr>
<td><strong>FONT SIZE</strong></td>
</tr>
<tr>
<td>20</td>
</tr>
</tbody>
</table>
CLICK on the CUSTOM radio button. Fields will be blank, complete the fields as detailed in the table on previous page as shown below. CLICK on SAVE at the bottom of the page to retain changes.

Note: If you wait to save until the input for all fields is complete you may receive an error message indicating the Merchant can’t be updated. If you receive this error try again, saving after each field is entered. Also, the tab key will not advance the cursor to the next field, each field will need to be clicked to select.
Enabling the Auto-populate (Intelikey) feature.

Locate the desired Merchant in the Merchant List dropdown and select.

**CLICK** on the CUSTOM FIELDS PROFILE TAB.

When the Custom Fields Profile page is displayed, select the desired **Item Level Custom Field** then **CLICK EDIT**.
The **EDIT CUSTOM FIELD** dialog box will be displayed. **CLICK** the checkbox for **ENABLE INTELLIGENT KEYING**, then **CLICK OK**.
After clicking OK, the Edit Custom Fields dialog box will close and the Custom Fields Profile page will update to reflect the change. CLICK on SAVE at the bottom of the page to retain the changes.
Disabling the Smart Client Virtual Batch Ticket

Locate the desired Merchant in the Merchant List dropdown and select.
Locate the **VIRTUAL BATCH TICKET** section on the Customer’s **GENERAL Profile** page. By default this option is enabled, as shown below.
To disable the Virtual Batch Ticket, **CLICK** on the **ENABLE CHECKBOX** within the section of the page. **CLICK SAVE** to retain the changes.