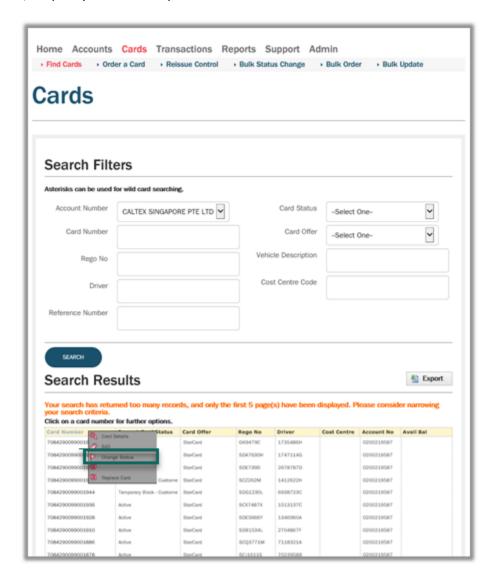


Card Management

Cancel card, Change Card Status, Pin Reset, and Replace Card

Cards > Find Cards > Change Card Status

To cancel a card, temporary block or reset pin





Change Card Status - effective immediately

- 1. Go to Cards > Find the Card then search for the Card to be updated
- 2. Click the card and select "Change Status"
- 3. A new window will appear, go to "**New Card Status**" field and choose the new card status from the dropdown options
- 4. Click "Save" to finalize the changes
- 5. A prompt at the screen stating, "The card status for card 70****** has been successfully changed to {New Card status selected}"

Change Card Status – Future dated (30 days from processing date)

- 1. Go to Cards > Find the Card then search for the Card to be updated
- 2. Click the card and select "Change Status"
- A new window will appear, go to "New Card Status" field and choose the new card status from the dropdown options. **For Replacement cards: Set the card to Cancelled or Temporary Block - Customer Request.
- 4. Enter the effective date of the change on the "New Status Begin Date" field if the change should not take effect immediately. Click "Save" to finalize the changes
- 5. Observe that there is a box containing the future dated action that appeared at the screen

Pin Reset - Setting the card to Ready for Use

- 1. Go to Cards > Find the Card then search for the Card to be updated
- 2. Click the card and select "Change Status"
- 3. Depending on card sub status (i.e. *Normal service/No Transactions*: (a) A new window will appear, go to "New Card Status" field and choose "Ready for Use"
- 4. Or if "Ready for Use" is not available select "Temporary Block Customer Request" from the dropdown options then Click "Save"
- 5. *Then change selection should display: Ready for Use. Set the card status to "Ready for Use"
- 6. Click "Save" to finalize the changes
- 7. A prompt at the screen stating "The card status for card 70****** has been successfully changed to PIN Reset



Card Replacement

To tag the card as Stolen, Damaged, and Lost

Cards > Find Cards > Change Card Status





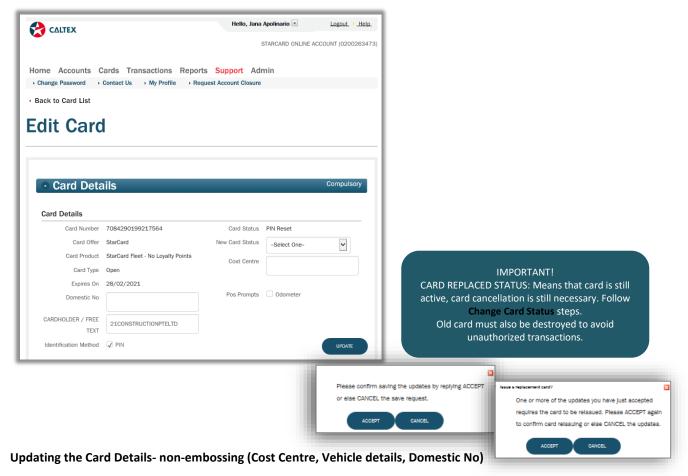
- 1. Go to Cards > Find the Card then search for the Card to be updated/replaced
- 2. Click the card and select "Change Status". A new window will appear, go to "New Card Status" field and choose "Damaged or Lost or Stolen". Then Click "Save"
- 3. If applicable, enter a **Temporary Card Delivery Address**
- 4. Click "Save" to finalize the changes
- 5. A prompt at the screen stating "Would you like a Replacement for your Damaged Card? Note: The Card Number will change"
- 6. Clicked "Replace", a confirmation will appear that "Success! Card 70****** ordered"



Card Replacement

To update Card Details: embossing and non-embossing

Cards > Find Cards > Edit Card



- 1. Go to Cards > Find the Card then search for the Card to be updated/replaced
- 2. Click the card and select "Edit"
- 3. A new window will appear, allowing changes on the card. Edit field/s that needs update
- 4. Go to the bottom of the screen and click the "Update" button to finalize the changes
- 5. A pop-up will appear asking to confirm the changes. Click "Accept" to proceed or otherwise click "Cancel"
- 6. Clicked Accept, A confirmation of "Success! Your card details have been saved" will appear at the top of the screen.

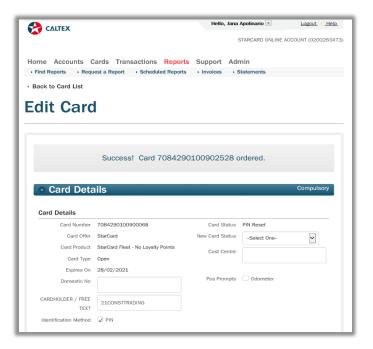


Requires Replacement card: Updating the Card Details- embossing (Product, License Plate, Cardholder Free text, POS, PIN)

- 1. Go to Cards > Find the Card then search for the Card to be updated/replaced
- 2. Click the card and select "Edit"
- 3. A new window will appear, allowing changes on the card. Edit field/s that needs update
- 4. Go to the bottom of the screen and click the "Update" button to finalize the changes

A pop-up will appear asking to confirm the changes. Click "Accept" to proceed or otherwise click "Cancel" Selecting "Cancel" will not Save the changes and reissue a card.

- 5. Clicked Accept, a prompt will appear informing the user that a new card will be created
- 6. A confirmation of "Success! Card 70******** ordered" will appear at the top of the screen



Important:

Two steps to cancel the old card.

- 1. After new card has been ordered. Recommended step: Change Card Status Future dated (30 days from processing date) Set the card to Cancelled or Temporary Block Customer Request.
- 2. Follow steps of Change Card Status change effective immediately to tag the old card as "Cancelled" once the Replacement card was received. Old card must also be destroyed to avoid unauthorized transactions.



<u>Important:</u> Available drop-down options will be dependent on the CURRENT Card's Status - following Card **Status Transition Rules.**

Card Status	Description
Card Lost	A manually triggered inactive card status used to indicate that card is lost. (Permanent deactivation of the card).
Card Replaced	A manually triggered active card status used to indicate that card is replaced. Card Replaced means that card is still active and cancellation is necessary. Set the card into an inactive status once the new card is received or schedule the future-date cancellation.
Card Stolen	A manually triggered inactive card status used to indicate that card is stolen. (Permanent deactivation of the card)
Expired	A system triggered inactive card status which indicates that the card is beyond its card life. (Permanent deactivation of the card)
Active/ Pin Reset/ Ready for Use	A system or manually triggered active card status.
Card Damaged	A manually triggered active card status used to indicate that card is damaged. Card Damaged means that card is still active and cancellation is necessary. Set the card into an inactive status once the new card is received or schedule the future-date cancellation.
Temporary Block - Customer Request	A manually triggered inactive card status used to indicate that Customer has requested for Temporary deactivation of the card. Call customer service to activate the card.
Cancelled *Do not Use for temporary cancellation*	A manually triggered inactive card status used to indicate that Customer has requested for Permanent deactivation of the card.