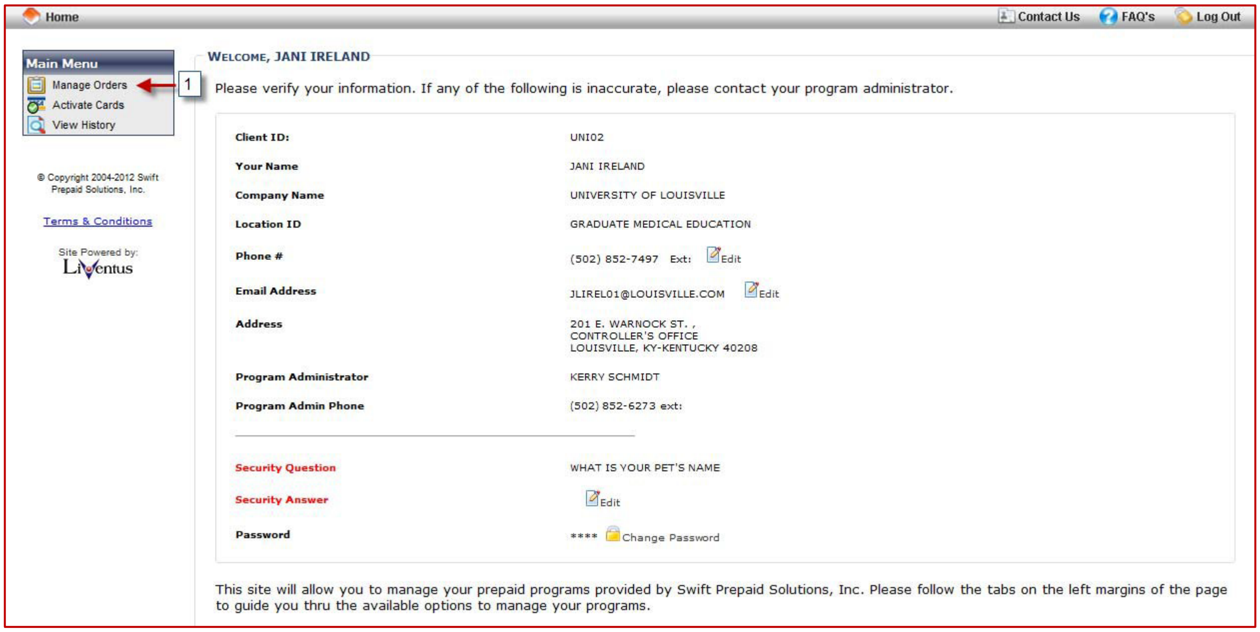
Swift Prepaid Card Manual

Quick Reference Guide

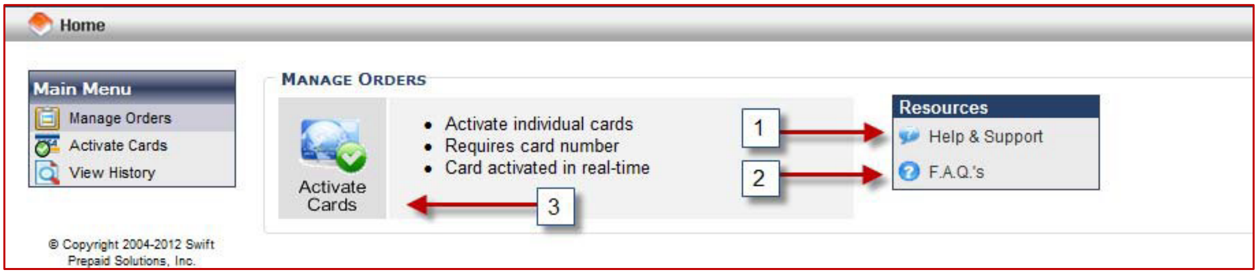
Card Activation, Card Balance Inquiry, System Support and FAQs

1. Once the user logs in they will be presented with the landing page and three options:
    - Manage Orders
    - Activate Cards
    - View History

2. Select Manage Orders (1)

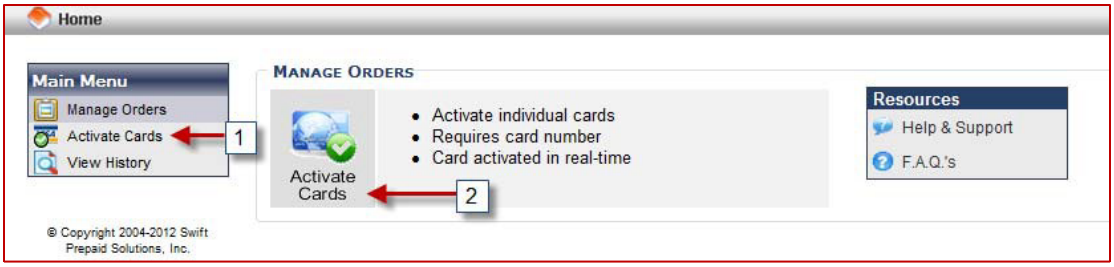


3. Once on the *Manage Orders* module, the user will have 3 options:
    - Help & Support (1)
    - F.A.Q's (2)
    - Activate Cards (3)

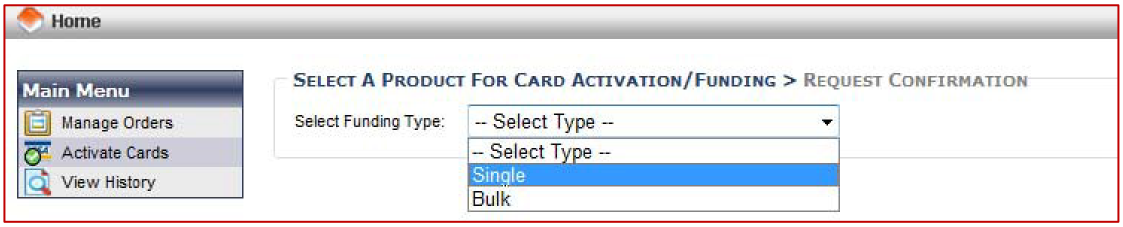


Card Activation and Funding

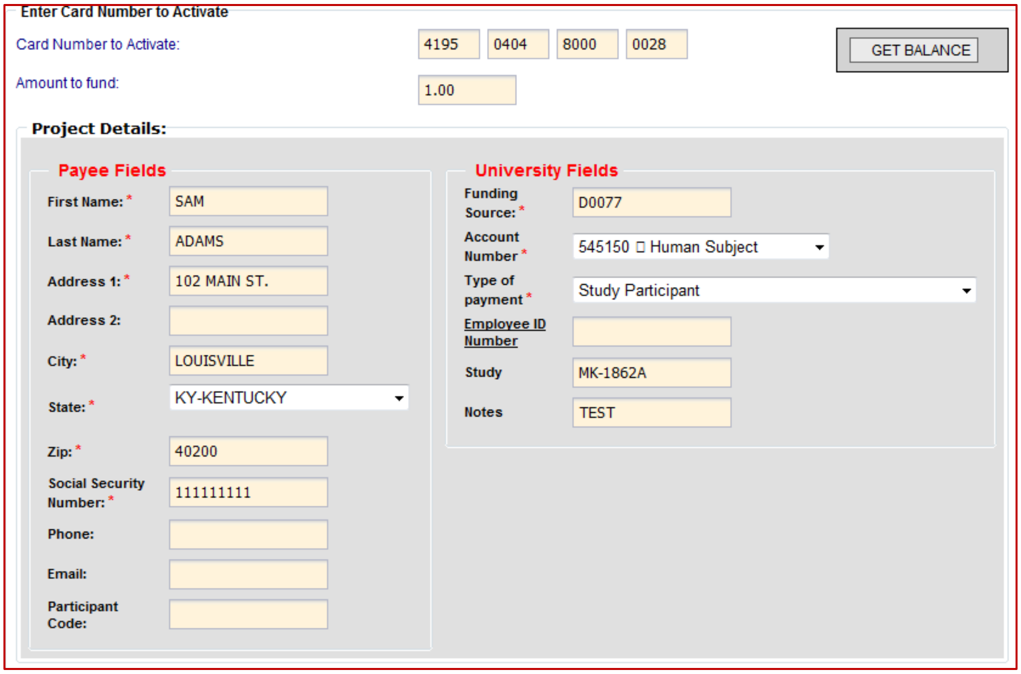
1. To Activate cards, the user can select either *Activate Cards* via the *Main Menu* table (1) or via the *Activate Cards* icon (2)



2. The User will be presented with a drop down offering two options, please select ***Single*** as we are not using the Bulk functionality.



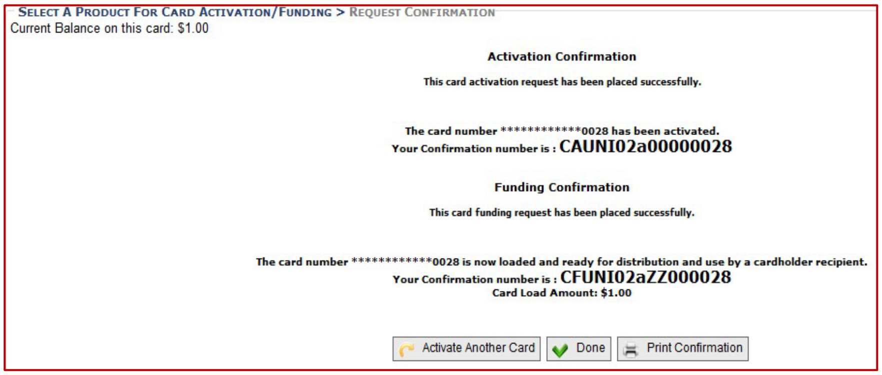
3. Below is a sample card activation completed template:
   - Required fields are indicated by an *



4. Free Form Fields
    - **Social Security Number**: It is extremely important that the SSN is entered correctly as this impacts many backend reports and will be verified with the IRS (and will subsequently impact future payments to the payee).
    - **Funding Source**: It is extremely important that the speed type/program is entered correctly
        - If you are unsure of your Funding Source, please check with your Unit Business Manager/LFO.

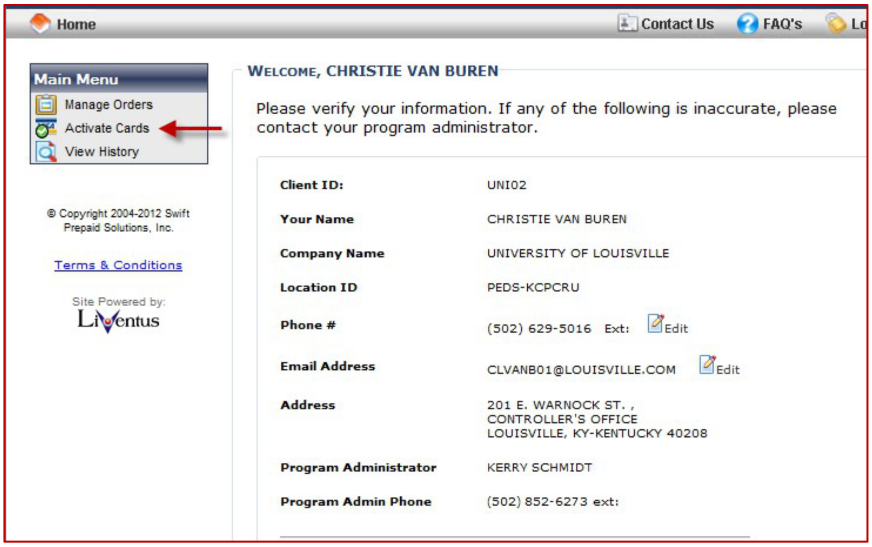
5. If the payee is an employee and the payment is not study related, the user ***<u>MUST</u>*** enter an Employee ID Number.

6. Successful activation will generate the following message:

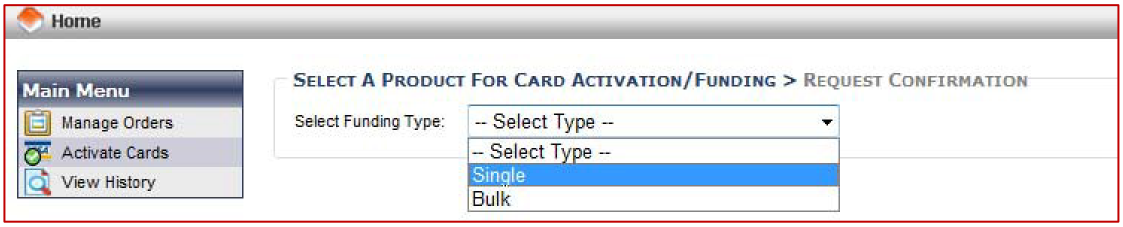


Card Balance Inquiry

1. A user can quickly look up the current value on a card by clicking on Activate Cards (on the landing page).

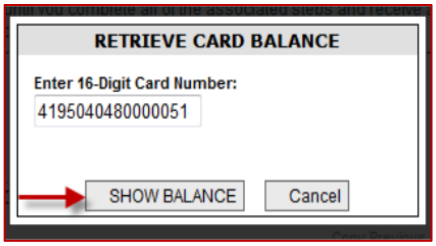


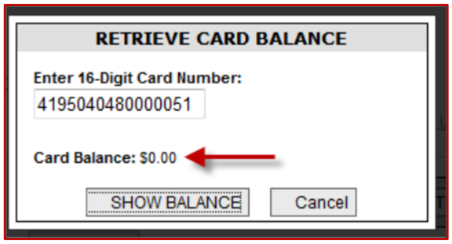
2. The user will then select Single as the Funding type and be presented with the Activation module.



3. The user will then enter the 16-digit card number and select **GET BALANCE**.

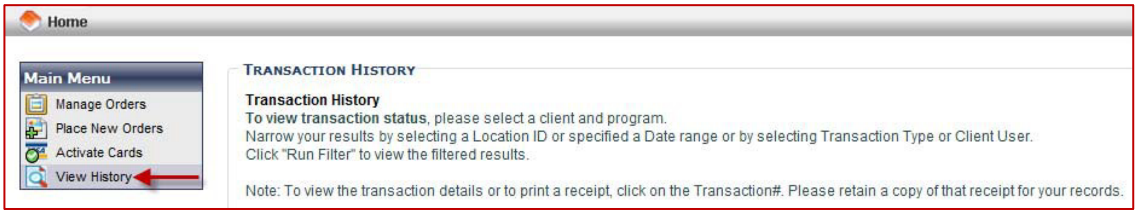
4. The user will receive the prompt below. Simply select **SHOW BALANCE** to display the current value on the card.





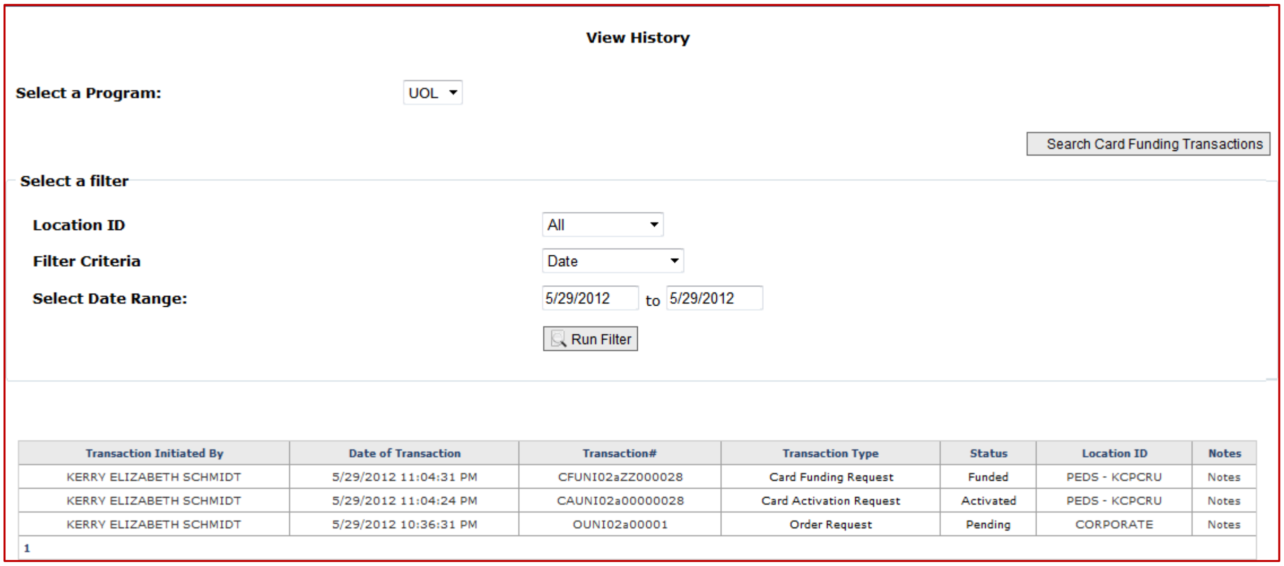
View History

1. From the Landing Page, the user can navigate to the View History module by clicking View History



2. After selecting **View History**, the user will have three ways to filter for results:
   - Location ID – This will be limited to the location you are assigned to
   - Filter Criteria (Date, Transaction Type, User)
     - ➢ Date: The date of the transaction
     - ➢ Transaction Type: Provides additional filtering options
       1. Individual Card Activations
       2. Individual Card Funding
       3. Returned Card Credit
       4. Bulk Order Placed
       5. Bulk Order Shipment Confirmed
     - ➢ User: The user that initiated the transaction

3. Results will be displayed similar to the screen shot below:
    - The user can click on the headers to sort each column



View History

Select a Program: UOL

Search Card Funding Transactions

Select a filter

Location ID: All

Filter Criteria: Date

Select Date Range: 5/29/2012 to 5/29/2012

Run Filter

Transaction Initiated By	Date of Transaction	Transaction#	Transaction Type	Status	Location ID	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 11:04:31 PM	CFUNI02aZZ000028	Card Funding Request	Funded	PEDS - KCPCRU	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 11:04:24 PM	CAUNI02a00000028	Card Activation Request	Activated	PEDS - KCPCRU	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 10:36:31 PM	OUNI02a00001	Order Request	Pending	CORPORATE	Notes

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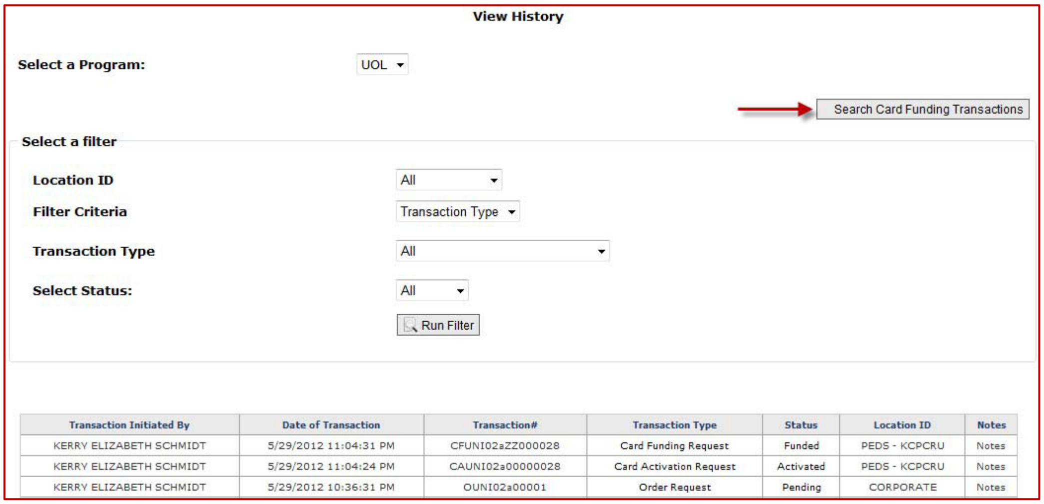
Search Card Funding Transactions

1. From the View History Module, the user may also select the Search Card Funding Transactions to view more details on a specific card(s)



View History

Select a Program: UOL

Search Card Funding Transactions

Select a filter

Location ID: All

Filter Criteria: Transaction Type

Transaction Type: All

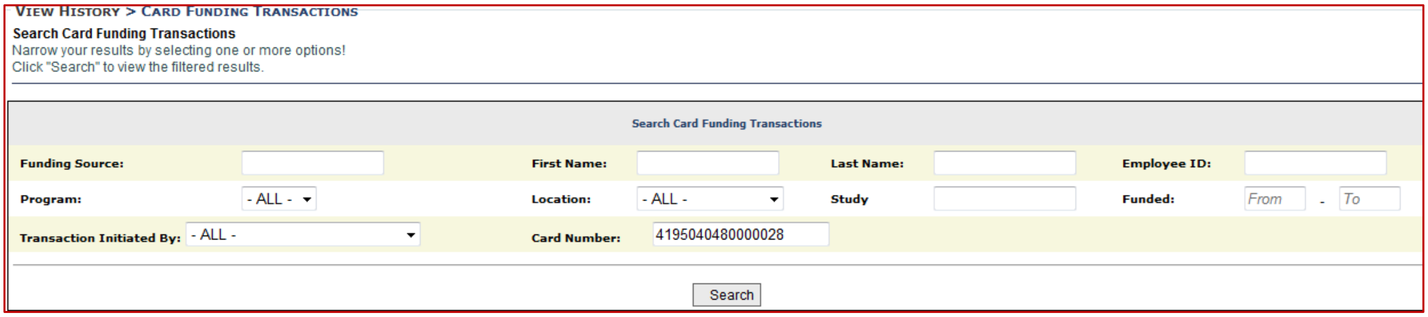
Select Status: All

Run Filter

Transaction Initiated By	Date of Transaction	Transaction#	Transaction Type	Status	Location ID	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 11:04:31 PM	CFUNI02aZZ000028	Card Funding Request	Funded	PEDS - KCPCRU	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 11:04:24 PM	CAUNI02a00000028	Card Activation Request	Activated	PEDS - KCPCRU	Notes
KERRY ELIZABETH SCHMIDT	5/29/2012 10:36:31 PM	OUNI02a00001	Order Request	Pending	CORPORATE	Notes

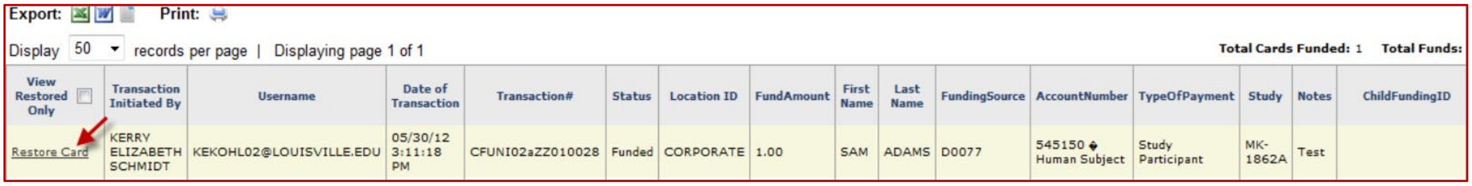
2. The User can filter by any of the following options:
    - Funding Source
    - First Name
    - Last Name
    - Employee ID
    - Program – UoL *(will always be UoL)*
    - Location
    - Study
    - Funded
    - Transaction Initiated By
    - Card Number

3. If no filter criteria is entered, the system will default to activity for the current day



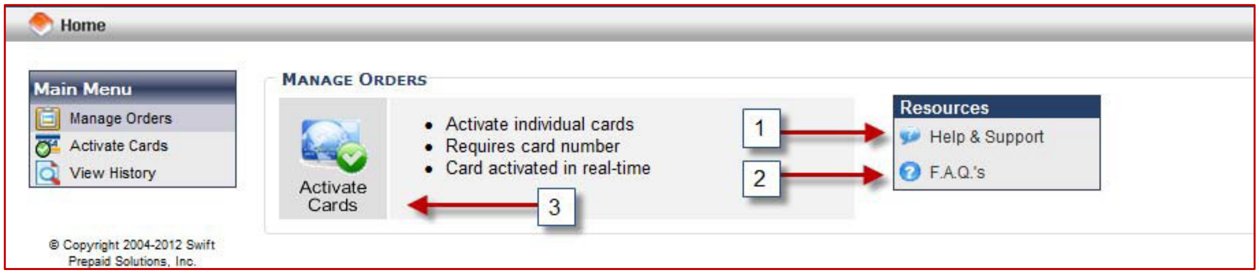
4. Search Results will be displayed similar to the screen below
   - Results can be exported to Microsoft Excel and Microsoft Word

5. The user can "Restore Card"
   - This removes and de-activates the card and returns it to available inventory
   - This should be used if a card is funded in error



Help & Support

1. From the Manage Orders page, click on Help & Support.



2. The Help & Support module will require the user to enter the information below and a request will be submitted to Swift for resolution. It is usually a good idea to contact your Program Administrator before submitting an issue to Swift, as they may already be aware of issue and the resolution.

HELP AND SUPPORT

In order that we may more promptly respond to and help you solve your problems, please fill out this support form as completely as possible. The information you provide at this time is required for us to assist you with your issue. One of our Tech Support Representatives will respond to you as soon as possible.

First Name

Last Name

Email Address

Connection Speed -Select One-

Operating System -Select One-

Web Browser -Select One-

Screen Resolution -Select One-

Nature / Topic -Select One-

Message

Send

FAQs

1. The FAQs module will walk the user through these 10 common technical issues. If you are still experiencing application issues, please submit a ticket through the Help and Support module documented above.

TECH SUPPORT FAQ'S

Top 10 Frequently Asked Questions (FAQs) *last updated March 2007*

1. Why can't I edit all of the information on the Welcome page?
2. I need to change my password.
3. Why can't I change the shipping address where the order is being shipped to?
4. When I place an order I receive an error message telling me I have exceeded my order limits.
5. I need access to additional functions and rights over additional locations.
6. When will my card order ship?
7. When will my card order be activated?
8. When will my credit post to my account?
9. I entered in a transaction but I can't find that transaction anywhere.
10. I am having problems with your site