eZCard
Manual

COMMERCIAL CARD PAYMENT
SOLUTIONS

eZCard Manual

For all support related inquiries, contact our support team at:
Phone: 866.572.1637

CONTENTS

SET UP

Step 1: Go to ezcardinfo.com to enroll.

Step 2: Begin Your Enrollment
The portal will first prompt you to enter your full credit card number, and then the name as it appears on your card, followed by expiration date, setup of your security questions and finally, verification of a designated email address.

Step 3: Enter Account Details

VERIFY EMAIL ADDRESS

Step 1: Navigate through Alerts **>** Notification Preferences **>** Resend verification

Step 2: Input verification code sent to the email address, and click "Verify."
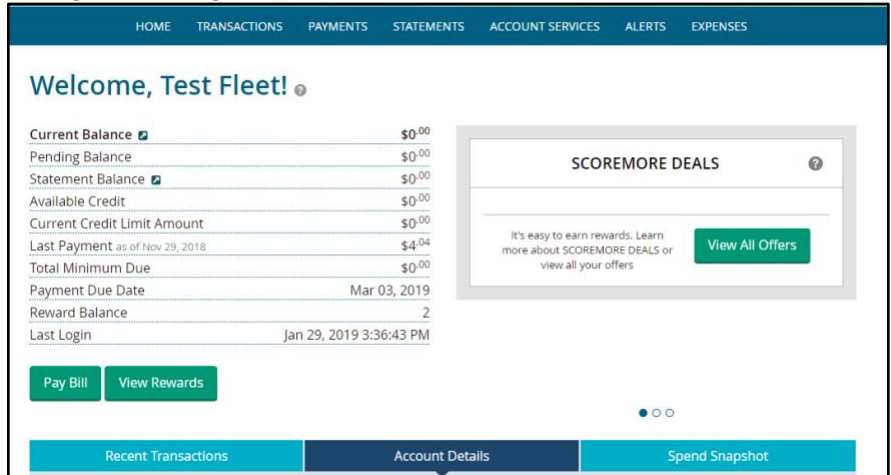**Note:** Email address must be verified upon first login for the portal to work effectively.

ACCESSING ACCOUNT DETAILS

VIEW CURRENT BALANCE, AVAILABLE CREDIT AND STATEMENT INFORMATION

Step 1:   Navigate through Home **>** Account Details

TRANSACTIONS

SEARCH AND EXPORT

Step 1:   Navigate through Transactions **>** Search Transactions
Step 2:   Filter By Time Period, Categories or Amount.
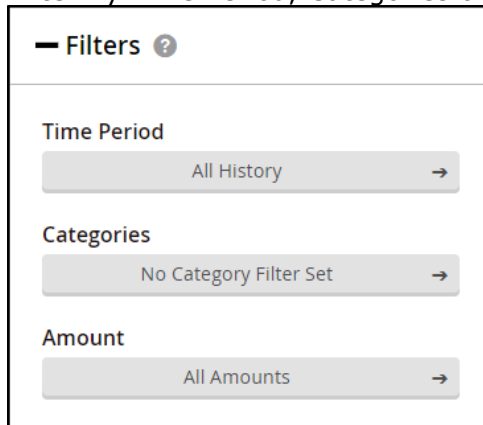
Step 3:   Choose file type for exporting.
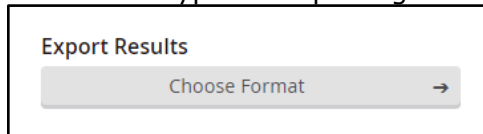
Step 4:   You may input text into the Search Transactions box to refine your search.

TRANSACTION DISPUTES

Please note the difference between a dispute versus fraud

<u>Dispute</u> – A transaction by a vendor/supplier that should not have been charged. It should be disputed if you are unable to remedy the situation directly with the vendor. Documented

dates and information related to the attempts to rectify the transaction in dispute needs to be provided. The card remains open.

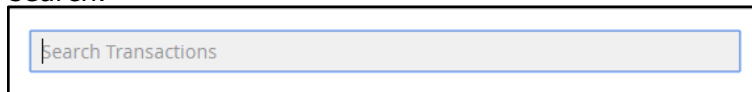Fraud – An unauthorized and unrecognized charge. The card will be closed immediately, and a new card account will be created.

Step 1:	Navigate through Transaction **>** Transactions Search
Step 2:	Select transaction, then click "Dispute This Charge," and follow the prompts.

SEP 23, 2018 $2.00
CONOCO - SEI 29063   AUTO RELATED

Post Date: Sep 23, 2018   Transaction Type: Purchase
Transaction Date: Sep 21, 2018   Original Amount: $2.00
City/St: MERRIAM , KS   Original Currency: USD
Zip: 66204   MCC: 5542
Country Code: US   MCC Description: Automated Gasoline
Category: Auto Related   Dispensers
Transaction Code: 05   Merchant ID: 650000009124747
Reason Code: 00   Originating Account #: -
                                                       Edit |Dispute This Charge

PAYMENTS

ADD A PAYMENT, VIEW PAYMENT SUMMARY AND MANAGE RECURRING PAYMENTS

Step 1:	Navigate through Payments **>** Add a Payment Account to setup an account. **Note:** This must be completed before a payment can be made.

Payment Accounts (0) ?

Add a Payment Account

OPTION 1:	Navigate through Payments **>** Make A Payment to process a payment.
OPTION 2:	Navigate through Payments **>** Payment Summary to view pending payments .
OPTION 3:	Navigate through Payments **>** Manage Recurring Payments to setup auto-pay.

PAYMENTS   STATEMENT

PA Payments UMMARY

MANAGE PAYMENT
ACCOUNTS

MAKE A PAYMENT

MANAGE RECURRING
PAYMENTS

STATEMENTS

VIEW STATEMENTS

Step 1:	Navigate through Statements **>** View Statements
Step 2:	Click "View Transaction Detail" to view detailed transactional history.
Step 3:	Click "Make a Payment" to route the payment with the pertinent information.
Step 4:	Click "View Statement PDFs" for downloadable file(s).

Statements (7)

View Statement PDFs

February 18 2019 Statement Period

Previous Balance: $0.00	Payments: $0.00
Purchases: $0.00	Other Charges: $0.00
Cash: $0.00	Finance Charges: $0.00
Special: $0.00	New Balance:: $0.00
Credits: $0.00	Total Minimum Due: $0.00
	Payment Due Date: Mar 03, 2019

View Transaction Detail | Make A Payment

February 04 2019 Statement Period

STATEMENT PREFERENCES

Step 1:	Navigate through Statements **>** Statement Preferences
Step 2:	Select your preference to receive your statement by mail or electronically via email.

Statement Delivery Options
○ Electronic
◉ Mail

Step 2:	**Note:** If you choose to receive statements electronically, you must verify your ability to download and view PDF files. Once verified, click "Agree and Verify.

In order to continue, your ability to download and view PDF files must be verified.

Start Verification

Agree and Verify | Cancel

ACCOUNT SERVICES

SETTING ALERTS

Step 1:	Navigate through Account Services **>** Alerts
Step 2:	To create alerts, select Create New Alert.

Alerts

- Create New Alert
- Current Alerts

The following options are available:

Add New Alert ✕

Alert me when:

New statement is available ▼

A single transaction exceeds
Account Past Due
Current balance exceeds $
Current balance within $ of credit limit
New statement is available
Number of transactions exceeds
Payment Due in X Days
Personal

Note: If selecting to be alerted when "Current balance exceeds $," "Current balance within $ of credit limit," "Number of transactions exceeds," or "Payment Due in X Days," you'll be prompted to indicate the amount or number of days.

Alerts can be modified by selecting Edit within Alert Settings.

Alert Settings	Alert History
Mandatory Alerts 🔒	
🔒 A single transaction exceeds	Test Fleet Edit
🔒 New statement is available	Test Fleet Edit

REPLACEMENT CARD

Step 1:   Navigate through Account Services **>** Request Replacement Card

Step 2:   Select reason for replacement card and provide any other important information, and click "Send Request."

Reason For Replacement of Card
○ Damaged
○ Name Change
○ Other

Please give us any other important information.

Please give us any other important information.

Send Request

?

CLOSE ACCOUNT

Step 1: Navigate through Account Services **>** Close Account
Step 2: Select reason for closing the account, provide any comments, and click "Send Request."

Please help us understand the reason for closing your account.
○ Service/Support
○ Rate
○ Card Features
○ Other

Comments:

Send Request