



MyCardUpdate Customer User Guide

Triple E Technologies, LLC

Version 042916.02

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Introduction

MyCardUpdate is a web based portal that allows you to monitor your private cards, change card permissions, and run card activity reports, all from the convenience of your computer or mobile device.

- ✓ Manage private cards from your mobile devices
- ✓ Change card information and permissions
- ✓ Activate and deactivate private cards
- ✓ Generate card status reports
- ✓ Reload gift cards and prepaid fleet cards

Triple E Technologies, LLC (Triple E) has designed MyCardUpdate to run on any device with internet access, from desktop computers to smartphones, making MyCardUpdate a quick and convenient way to update your cards on the go or from the convenience of your home.

MyCardUpdate Browser Requirements

Desktop

- Internet Explorer 9 or higher
- Latest version of Firefox
- Latest version of Google Chrome
- Latest version of Safari running on latest version of Mac OS X

IOS

- Safari or 3rd party alternatives on IOS 9

Android

- Google Chrome for Android

Accessing MyCardUpdate

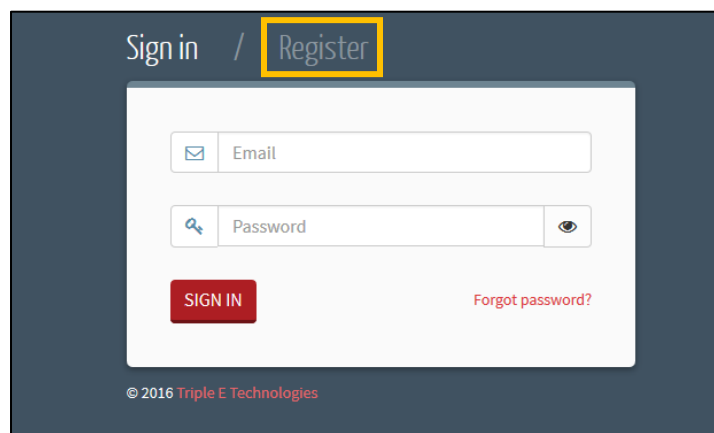
You can access MyCardUpdate by going to <https://mycardupdate.com> in your web browser, which displays the account login screen.

Creating an Account

MyCardUpdate accounts are connected to your email address and are pre-registered by merchant administrators. If you do not have an account yet, contact your merchant to ensure your email address is in their user list or to request an account.

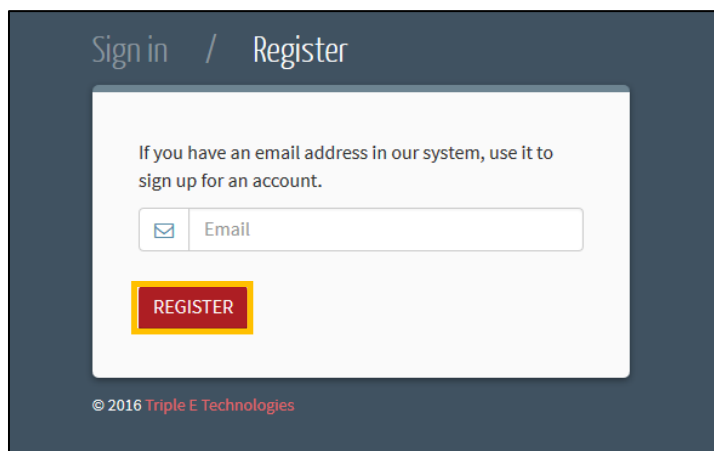
To create an account:

1. Go to <https://mycardupdate.com>. Login screen displays.



The screenshot shows the login interface with a dark blue background. At the top, there are two links: "Sign in" and "Register". The "Register" link is highlighted with a yellow rectangular box. Below the links is a white login form containing an "Email" input field with an envelope icon, a "Password" input field with a magnifying glass icon and a toggle eye icon, a red "SIGN IN" button, and a "Forgot password?" link. At the bottom of the form, there is a copyright notice: "© 2016 Triple E Technologies".

2. Click **Register**. Registration screen displays.



The screenshot shows the registration interface with a dark blue background. At the top, there are two links: "Sign in" and "Register". Below the links is a white registration form containing the text "If you have an email address in our system, use it to sign up for an account.", an "Email" input field with an envelope icon, and a red "REGISTER" button highlighted with a yellow rectangular box. At the bottom of the form, there is a copyright notice: "© 2016 Triple E Technologies".

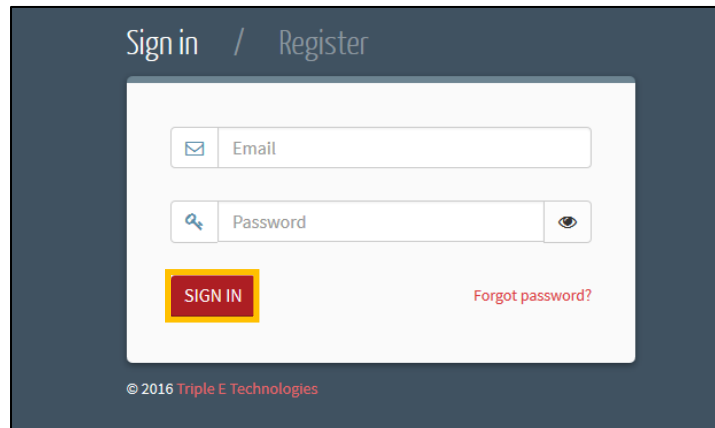
3. In the **Email** field, enter your email address, then click **Register**. This sends a password via email. If you receive an error message, contact your merchant to register your email address.
4. Log in to your email account and retrieve the password.

Logging In

Before you can access any of MyCardUpdate's features, you must first log in. If you are logging in for the first time, a temporary password will be sent to your email account and you will be prompted to change your password upon logging in.

To log in to MyCardUpdate:

1. Go to <https://mycardupdate.com>. Login screen displays.



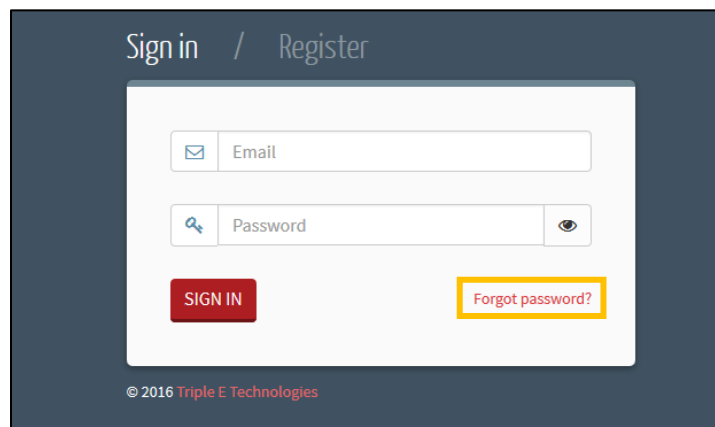
2. Enter your account email address and password, then click **Sign In**.

Retrieving Login Information

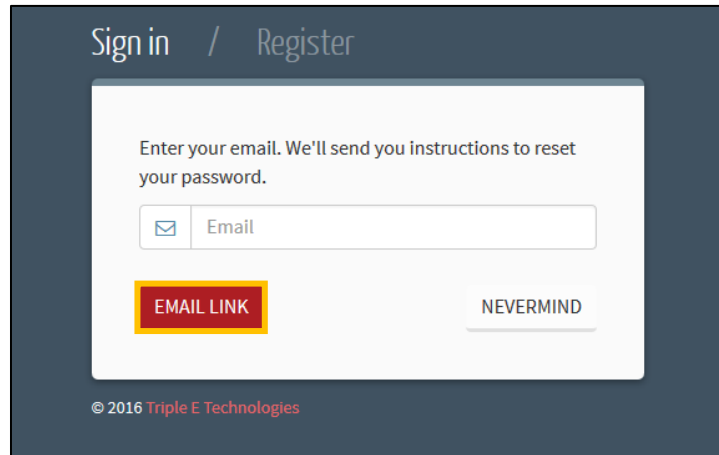
You can use MyCardUpdate's '**Forgot Password?**' feature to retrieve and/or reset your password. If you cannot remember your account email address, contact Triple E Support to retrieve it.

To retrieve password:

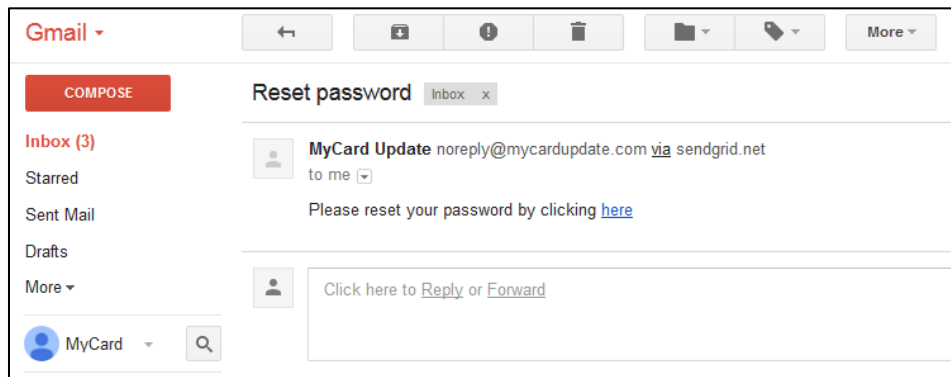
1. From the **Login** screen, click '**Forgot Password?**'. **Password Reset** screen displays.



2. In the **Email** field, enter your account email address, then click **Email Link**.



3. Log in to your email account and open the MyCardUpdate **Reset Password** email.



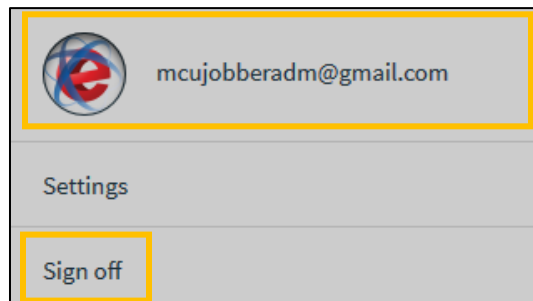
4. Follow the email instructions to reset your password.

Logging Out

When you are finished using MyCardUpdate, it is recommended to log out to protect your account information.

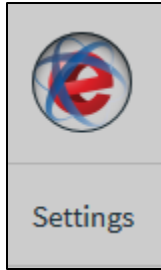
To log out:

1. Click your email address, located on the bottom-left side. Additional options display.



2. Click **Sign Off**.

Settings



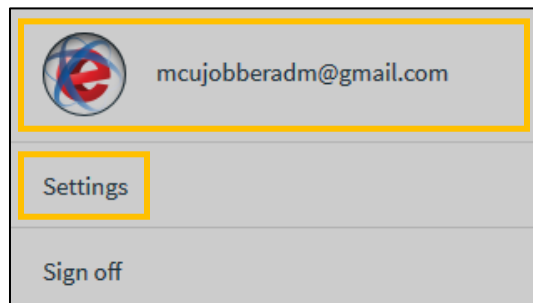
You can change your account settings, including your password, email address, and authentication configurations, at any time. You can access the **Settings** page by clicking the **Settings** tab located beneath your email address in the lower left corner of the MyCardUpdate screen.

The icon beside your email address is served from a third-party service called Gravatar. Gravatar allows you to associate an image with your email address, which can then be used on other sites. If you would like to create a Gravatar account for your email address, visit [Gravatar's website](#) for more information.

Access Settings

To access your settings:

1. Click your email address, located on the bottom-left side. Additional tabs display.

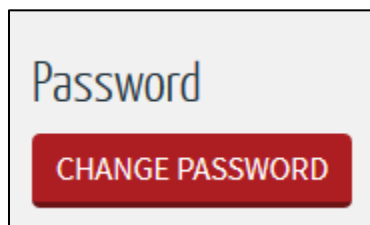



2. Click **Settings**.

Change Password

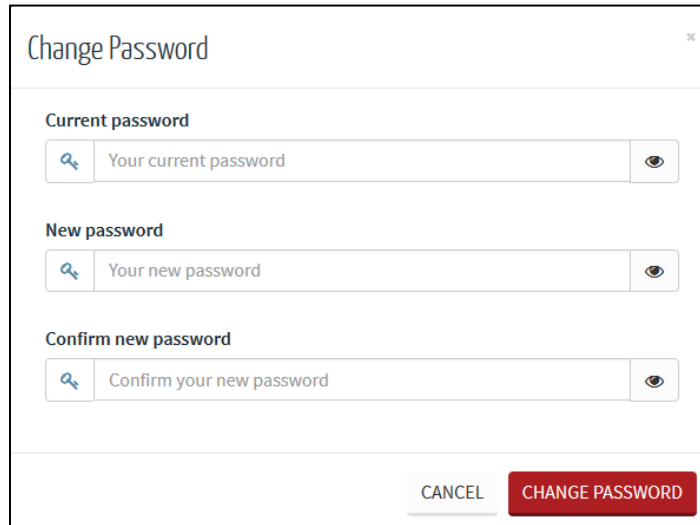
To change your password:

1. From the **Settings** page, in the **Password** section, click **Change Password**. **Change Password** screen displays.



2. If desired, click the eye icons  to display characters.
3. In the **Current Password** field, enter current password.
4. In the **New Password** and **Confirm New Password** fields, enter new password in accordance with the following password requirements:

- At least 8 characters
- Include at least one of each of the following:
 - Uppercase letter (A, B, C...)
 - Lowercase letter (a, b, c...)
 - Number (0, 1, 2, 3, 4, 5, 6, 7, 8, 9)
 - Special character (` ~ ! @ # \$ % ^ & * () _ + - = { } [] \ : " ; ' < > ? , . /)

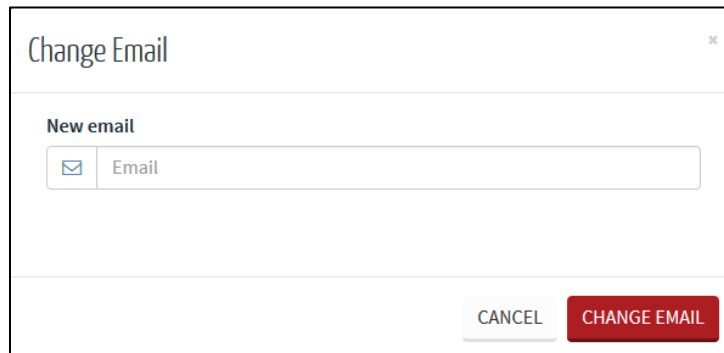


5. Click **Change Password**.

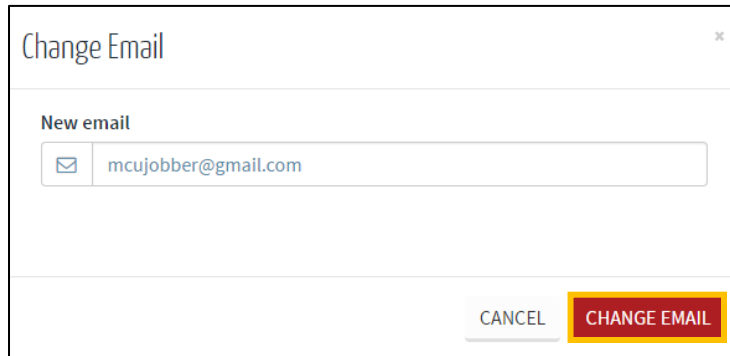
Change Email

To change your account email address:

1. From the **Settings** page, in the **Email Address** section, click **Change Email**. **Change Email** screen displays.



2. In the **New Email** field, enter new email address, then click **Change Email**.



Change Email

New email

mcujobber@gmail.com

CANCEL CHANGE EMAIL

Two-Factor Authentication

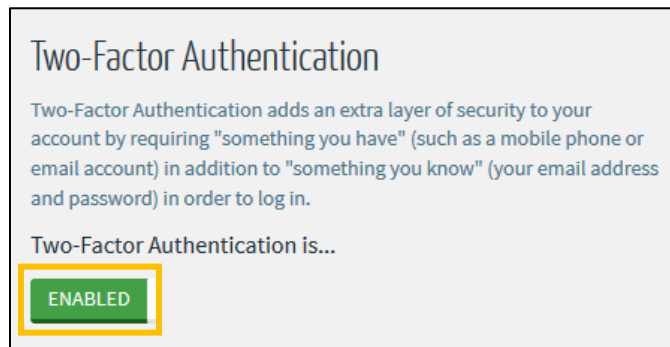
Two-factor authentication adds an extra layer of security to your account by requiring “something you have” (such as a mobile phone or email account) in addition to “something you know” (such as your email address and password) in order to log in. If you enable two-factor authentication, you will be prompted to provide a security code after logging in.

You can allow MyCardUpdate to remember your browser, enabling you to bypass the security code for all subsequent login attempts. Only use this option on trusted devices to help protect your account.

Two-factor authentication is disabled by default, meaning you will only need your email address and password to log in. You can enable and disable it at any time from the **Settings** page.

To set up two-factor authentication:

- From the **Settings** page, in the **Two-Factor Authentication** section, click the button to switch from **Disabled** to **Enabled**.



Two-Factor Authentication

Two-Factor Authentication adds an extra layer of security to your account by requiring "something you have" (such as a mobile phone or email account) in addition to "something you know" (your email address and password) in order to log in.

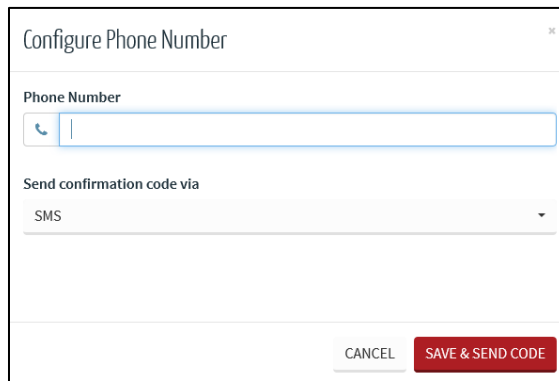
Two-Factor Authentication is...

ENABLED

Phone Authentication

To configure phone authentication:

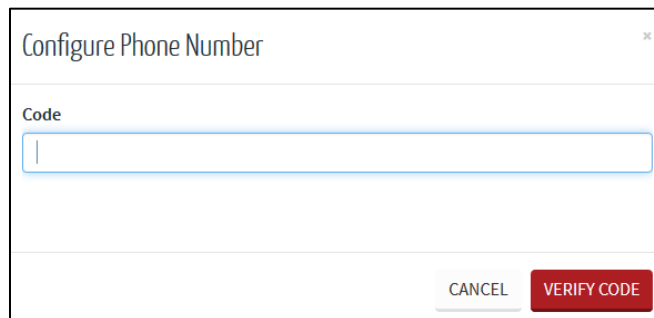
- Click **Add Phone Number**.



2. In the **Phone Number** field, enter phone number.
3. In the **Send Confirmation Code Via** dropdown menu, select one of the following:

SMS	Receive code via automated text message. Charges may apply, depending on your carrier and plan.
Voice	Receive code via automated text to speech phone call.

4. Click **Save & Send Code** to send confirmation code to entered phone number. **Configure Phone Number** screen displays.



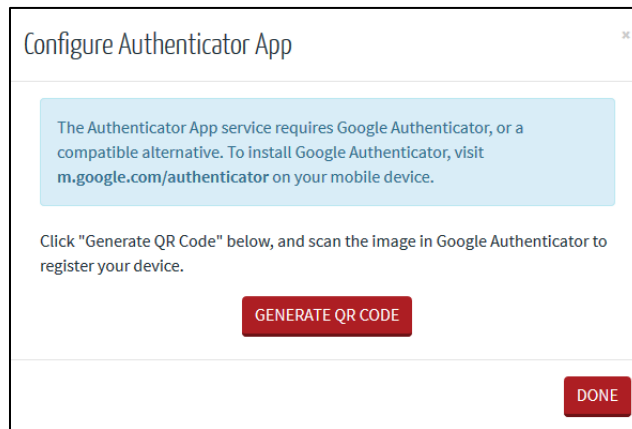
5. In the **Code** field, enter the confirmation code, then click **Verify Code**.
6. In the **Send codes to my...** dropdown menu, select **Phone**.

Authenticator App

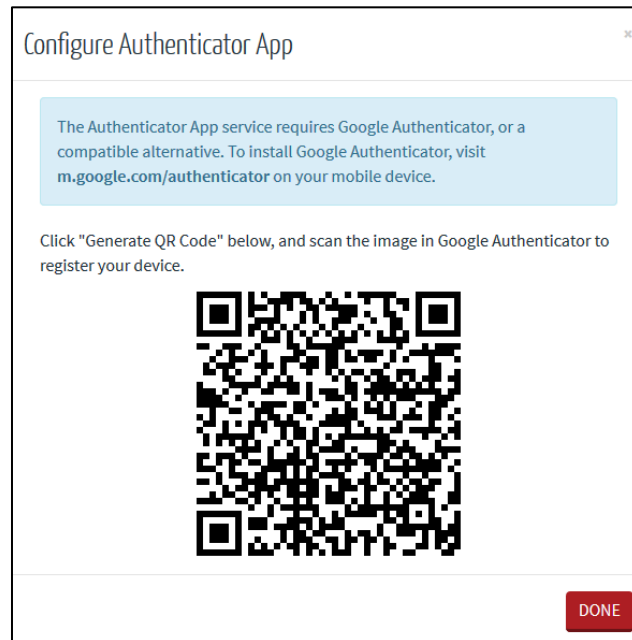
Using the Authenticator App requires you to download Google Authenticator or other authentication application to your mobile device.

To configure Authenticator App:

1. Download and install **Google Authenticator** on your mobile device.
2. In the MyCardUpdate **Settings** page, click **Configure Authenticator App**. **Configure Authenticator App** screen displays.



3. Click **Generate QR code**. QR code displays.

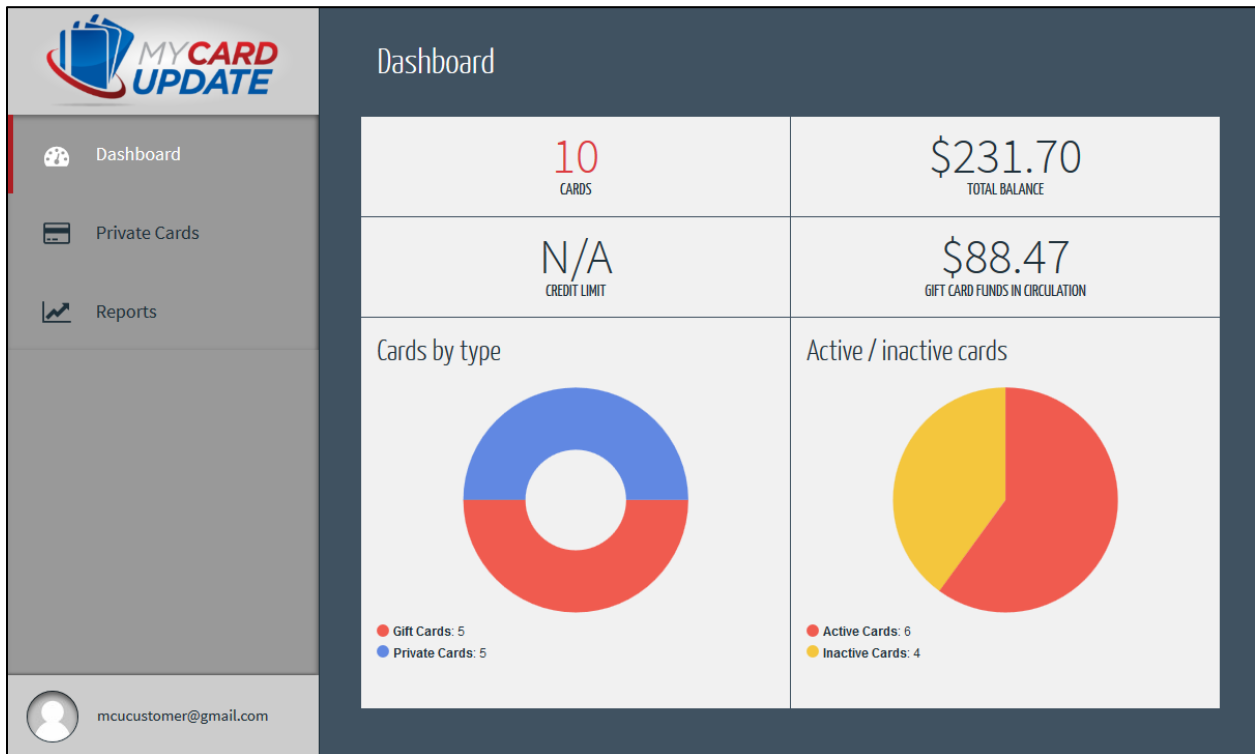


4. Using **Google Authenticator**, scan the QR code, then click **Done** on MyCardUpdate screen.
5. In the **Send codes to my...** dropdown menu, select **Authenticator App**.

Dashboard

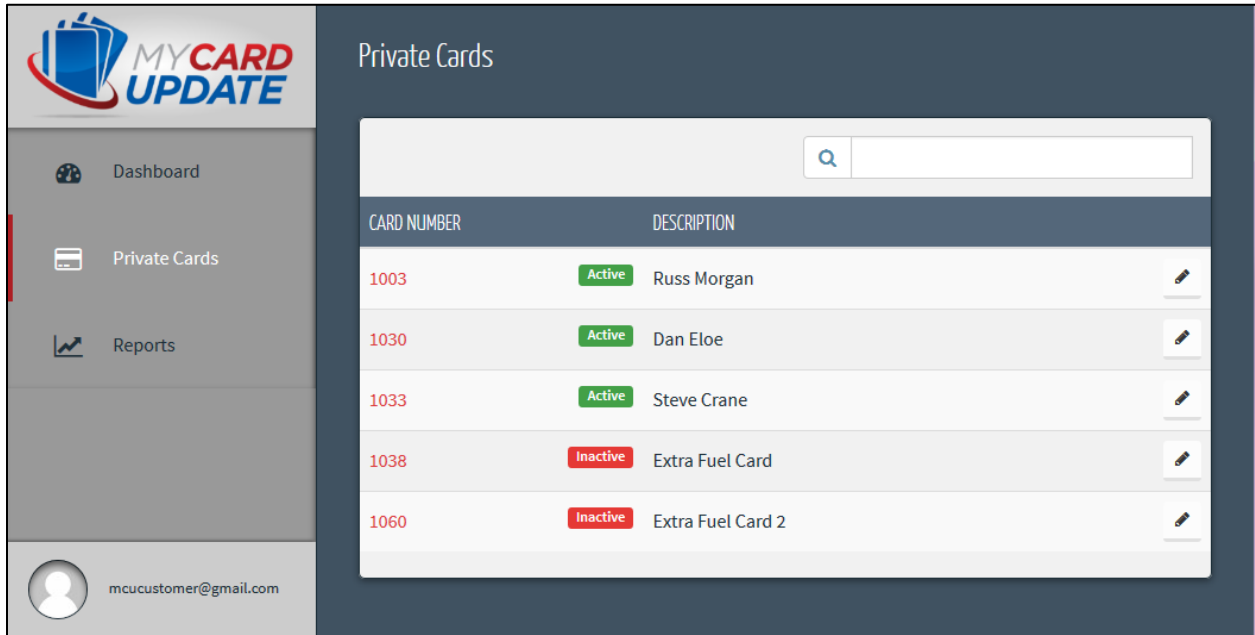
The first screen you will see upon logging in to MyCardUpdate is the **Dashboard**, which shows you the total number of active and inactive cards you have in circulation as well as your total outstanding balance.

NOTE: Balance and credit limit balance information may not be visible depending on your merchant's configuration.



Private Cards


The **Private Cards** tab shows you all of the active and inactive cards linked to your account. You can use this tab to view and edit your card information, including status, description, PIN and vehicle numbers, and prompts. You can also add funds to your gift cards and prepaid fleet cards.



Editing Cards

You can edit basic information and verification requirements for each of your cards.

To edit cards:

- From the **Private Cards** tab, click on the pencil icon  for a card number. **Editing Private Card #** screen displays.
- In the **Basic information** section, change the following, as desired:

Card Status	Active to enable card, or Inactive to disable card.
Description	Unique card description, such as cardholder name.

Basic information

Card Status
 ACTIVE

Description

3. In the **Verification Requirements** section, change the following, as desired:

PIN	Cardholder P ersonal Identification N umber
Prompt for PIN	Cardholder must enter PIN to use card.
Vehicle Identifier	Unique number identifying vehicle.
Prompt for Vehicle ID	Cardholder must enter Vehicle ID to use card.
Prompt for Driver ID	Cardholder must enter Driver ID to use card.
Prompt for Odometer	Cardholder must enter odometer reading to use card.

Verification requirements

PIN **Prompt for PIN** YES

Vehicle Identifier **Prompt for Vehicle ID** NO

Prompt for Driver ID NO **Prompt for Odometer** YES

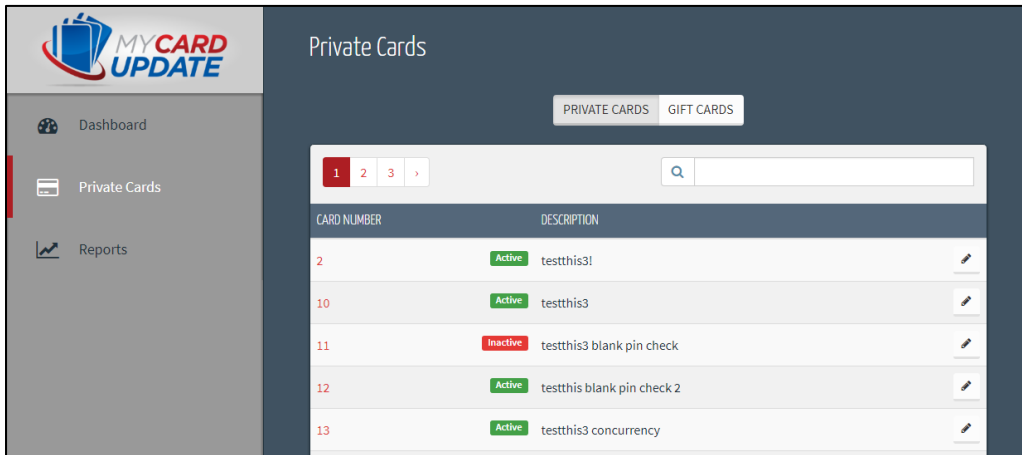
4. Click **Save**.

Recharging Cards

If your merchant has enabled payment processing, you will be able to add funds to your rechargeable gift cards and prepaid fleet cards.

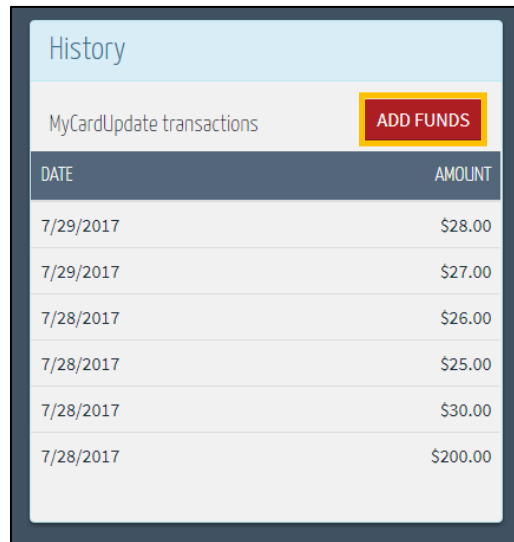
To recharge cards:

1. From the **Private Cards** tab, select an applicable card.



- On the **Private Card** details page, under the **History** section, click the **Add Funds** button.

Note: If the *Add Funds* button is not available, payments have not been enabled. Contact your merchant to discuss your payment options.



- On the **Reload Private Card** page, enter values for the following:

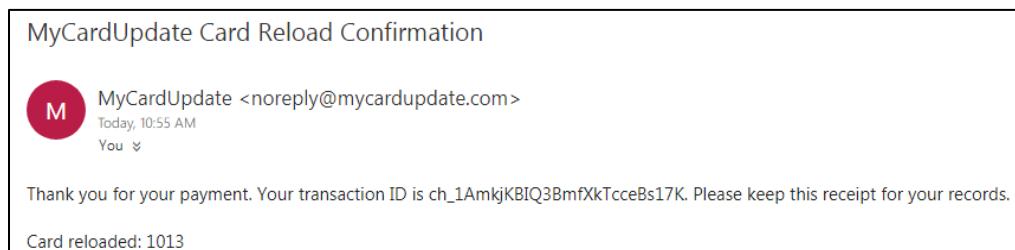
Amount	Dollar amount to be added to your private card.
Credit or debit card	16-digit card number, expiration date (in MM/YY format), and 3-digit CVC.
Save payment information?	Set to Yes to save your card information for future transactions.
Convenience Fee	Additional transaction fee. Note: This fee is set by your merchant and is subject to change.
Total	Total dollar amount (Amount + Convenience Fee) to be charged to the credit or debit card.

- Click **Check Out**.

- On the **Confirm payment information** screen, review the payment details, then click **Add Funds** to complete the transaction. **Note:** *If payment was successfully processed, the Payment Successful screen will display, and you will receive an email confirmation to the account linked with your MyCardUpdate account.*

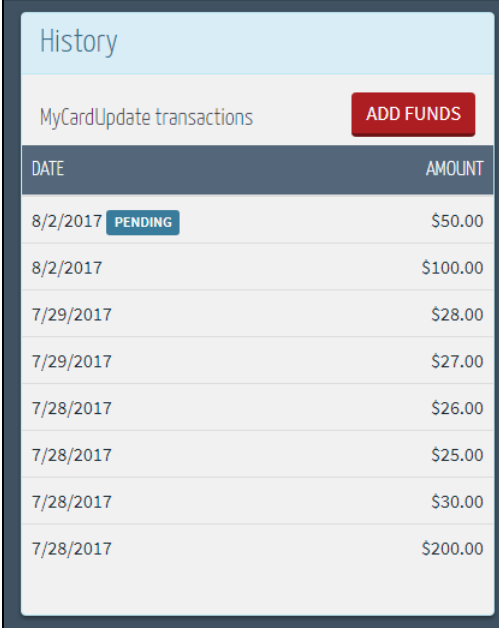
Confirm payment information	
Private Card #1013 reload	\$100.00
Convenience fee	\$5.00
Total	\$105.00

- If desired, click **Print Page** to print a copy of confirmation for your records.
- Click **Done**.



Transaction History

You can check the status of your previous payments by reviewing the **History** section under the **Private Cards** tab. Payments that haven't been processed yet will be flagged as **Pending**.



History

MyCardUpdate transactions [ADD FUNDS](#)

DATE	AMOUNT
8/2/2017 PENDING	\$50.00
8/2/2017	\$100.00
7/29/2017	\$28.00
7/29/2017	\$27.00
7/28/2017	\$26.00
7/28/2017	\$25.00
7/28/2017	\$30.00
7/28/2017	\$200.00

Reports

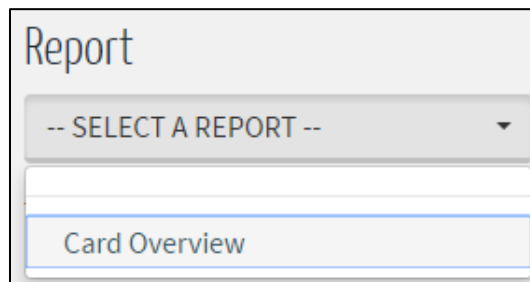
You can use MyCardUpdate to run a few different reports.

Card Overview

The Card Overview generates a list of all your private cards. When running this report, you can choose which information you'd like to display and can choose to include all your cards or just active ones.

To run **Card Overview** report:

1. In the **Reports** tab, select **Card Overview** from the **Report** dropdown menu. Additional sections display.



2. In the **Columns to display** section, check or uncheck the following checkboxes:

Customer Code	Unique code identifying customer.
Card Number	Unique number identifying payment card.
Card Description	Unique name or brief text identifying card.
Card Status	Card Active or Inactive status indicator.
Gift Card Indicator	Card type indicator (e.g., Private Card, Gift Card).
Balance	Outstanding account or card balance.
Credit Limit	Customer account credit limit dollar amount.
Vehicle Identifier	Unique number and/or name identifying driver vehicle.
Vehicle ID Required Indicator	Indicates whether card requires Vehicle ID entry for use.
PIN Number	Cardholder Personal Identification Number.
PIN Required Indicator	Indicates whether card requires PIN entry for use.
Odometer Required Indicator	Indicates whether card requires odometer entry for use.
Driver ID Required Indicator	Indicates whether card requires driver ID entry for use.

Columns to display

- Customer Code
- Card Number
- Card Description
- Card Status
- Gift Card Indicator
- Balance
- Credit Limit
- Vehicle Identifier
- Vehicle ID Required Indicator
- PIN Number
- PIN Required Indicator
- Odometer Required Indicator
- Driver ID Required Indicator

3. In the **Report parameters** section, check or uncheck the following checkboxes:

Only include active cards	Only include cards with Active status.
Only include gift cards	Only include cards marked as gift cards.
Only show customers with credit lines	Only include customers with credit charges allowed.

- Only include active cards
- Only include gift cards
- Only show customers with credit lines

VIEW REPORT

4. Click **View Report**. Report displays in a separate tab.

Card Overview		DOWNLOAD AS CSV				
CUSTOMER	CARD NUMBER	DESCRIPTION	STATUS	CARD TYPE	BALANCE	CREDIT LIMIT
ABC Markets - 85228						
	1003	Russ Morgan	Active	Private Card		
	1013		Active	Gift Card	\$22.47	
	1027	Pre Paid Fuel	Active	Gift Card	\$36.00	
	1028		Active	Gift Card	\$30.00	
	1030	Dan Eloe	Active	Private Card		
	1033	Steve Crane	Active	Private Card		
					Balance	Credit Limit
Master Total:					\$88.47	\$0.00

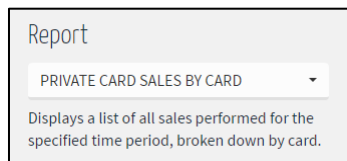
5. If desired, click **Download as CSV** to save the report as a CSV file.

Private Card Sales Report

The **Private Card Sales Report** displays a list of all sales performed for the specified time period, broken down by card.

To run the Private Card Sales Report:

1. In the **Reports** tab, select **Private Card Sales by Card** from the **Report** dropdown menu.



2. In the **Columns to display** section, check or uncheck the following checkboxes:

Invoice Number	Unique number identifying invoice.
Card Description	Unique card description, such as cardholder name.
Stock Number	Unique number identifying item.
Driver Number	Unique number identifying driver.
Vehicle Number	Unique number identifying vehicle.
Odometer	Vehicle odometer reading in whole miles.

Columns to display

- Invoice Number
- Card Description
- Stock Number
- Driver Number
- Vehicle Number
- Odometer

3. Enter values for the following:

Start date	User activity period beginning date.
End date	User activity period end date.

Report parameters

Start date

End date

[VIEW REPORT](#)

4. Click **View Report**. The report will display in a separate tab.

Private Card Sales by Card [DOWNLOAD AS CSV](#)

04/01/2017 through 05/05/2017

Customer with card data

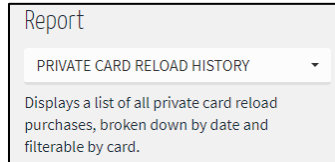
Date & Time	Card #	Invoice #	Card Desc	Stock #	Item Description	Driver #	Vehicle #	Odometer	Qty	Unit Price	Ext Amt
4/7/2017 4:10:32 PM	1080	1	testthis100	UNL	Unleaded Fuel	0	0	1347282	2.293	\$2.50	\$2.50
5/3/2017 2:22:43 PM	1080	1003	testthis100	WIPERS14	Wiper Blades	0	0	0	1.000	\$6.00	\$6.50
5/3/2017 2:22:43 PM	1080	1003	testthis100	DL1	Diesel Fuel	0	0	0	5.843	\$2.31	\$13.50
Totals for Customer with card data								2 Transactions	9.136		\$22.50
Grand Totals								2 Transactions	9.136		\$22.50

Private Card Reload History Report

The **Private Card Reload History** report displays a list of all private card reload purchases, broken down by date and filterable by card.

To run the Private Card Reload History Report:

1. In the **Reports** tab, select **Private Card Reload History** from the **Report** dropdown menu.



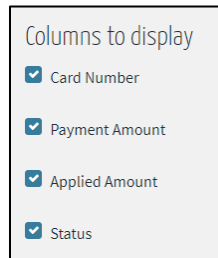
Report

PRIVATE CARD RELOAD HISTORY

Displays a list of all private card reload purchases, broken down by date and filterable by card.

2. In the **Columns to display** section, check or uncheck the following checkboxes:

Card Number	Unique number identifying private card.
Payment Amount	Amount paid on a private card.
Applied Amount	Amount applied to a private card.
Status	Payment state (i.e., pending, complete).



Columns to display

Card Number

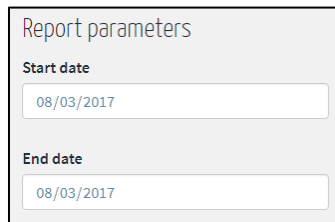
Payment Amount

Applied Amount

Status

3. Enter values for the following:

Start date	User activity period beginning date.
End date	User activity period end date.



Report parameters

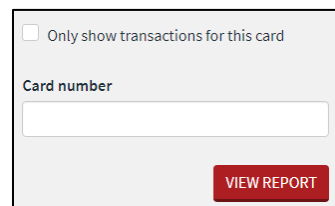
Start date

08/03/2017

End date

08/03/2017

4. If desired, click the **Only show transactions for this card** checkbox and fill out the **Card number** field to only generate data for the private card specified.



Only show transactions for this card

Card number

VIEW REPORT

5. Click **View Report**. The report will display in a separate tab.

Private Card Reload History [DOWNLOAD AS CSV](#)

07/01/2017 through 08/03/2017

TRANSACTION DATE	CARD NUMBER	APPLIED AMOUNT	PAYMENT AMOUNT	STATUS
7/28/2017				
6:09 PM	1013	\$200.00	\$204.00	Complete
11:15 PM	1013	\$30.00	\$34.00	Complete
11:31 PM	1013	\$25.00	\$29.00	Complete
11:33 PM	1013	\$26.00	\$30.00	Complete
Totals for 7/28/2017	4 Transactions	\$281.00	\$297.00	
7/29/2017				
12:05 AM	1013	\$27.00	\$31.00	Complete
12:06 AM	1013	\$28.00	\$32.00	Complete
Totals for 7/29/2017	2 Transactions	\$55.00	\$63.00	
8/2/2017				
6:20 PM	1013	\$100.00	\$105.00	Complete
6:25 PM	1013	\$50.00	\$55.00	Complete
Totals for 8/2/2017	2 Transactions	\$150.00	\$160.00	
8/3/2017				
2:42 PM	1013	\$5.00	\$10.00	Complete
2:55 PM	1013	\$10.00	\$15.00	Complete
Totals for 8/3/2017	2 Transactions	\$15.00	\$25.00	
Grand Totals	10 Transactions	\$501.00	\$545.00	