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ENROLLMENT

SET UP

**Step 1:** Go to ezcardinfo.com to enroll.

![Log In to Your Account](image)

**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.

![Enter Your Credit Card Number](image)

**Step 3:** Enter Account Details

![Name on Card](image)

![Card Expiration Date](image)

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.

![Notification Preferences](image)
ACCESSING ACCOUNT DETAILS

VIEW CURRENT BALANCE, AVAILABLE CREDIT AND STATEMENT INFORMATION

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

![Payment Solution Example Image]

TRANSACTIONS

SEARCH AND EXPORT

**Step 1:** Navigate through Transactions > Search Transactions

**Step 2:** Filter By Time Period, Categories or Amount.

![Transaction Search Example Image]

**Step 3:** Choose file type for exporting.

![Export Results Example Image]

**Step 4:** You may input text into the Search Transactions box to refine your search.

![Search Transactions Box Example Image]

TRANSACTION DISPUTES

*Please note the difference between a dispute versus fraud*

**Dispute** – 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.

**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.

**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.
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).

STATEMENT PREFERENCES

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

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.”
ACCOUNT SERVICES

SETTING ALERTS

**Step 1:** Navigate through Account Services > Alerts

**Step 2:** To create alerts, select Create New Alert.

- Create New Alert
- Current Alerts

The following options are available:

**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.
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.”

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.”