CONVENIENT CARDS

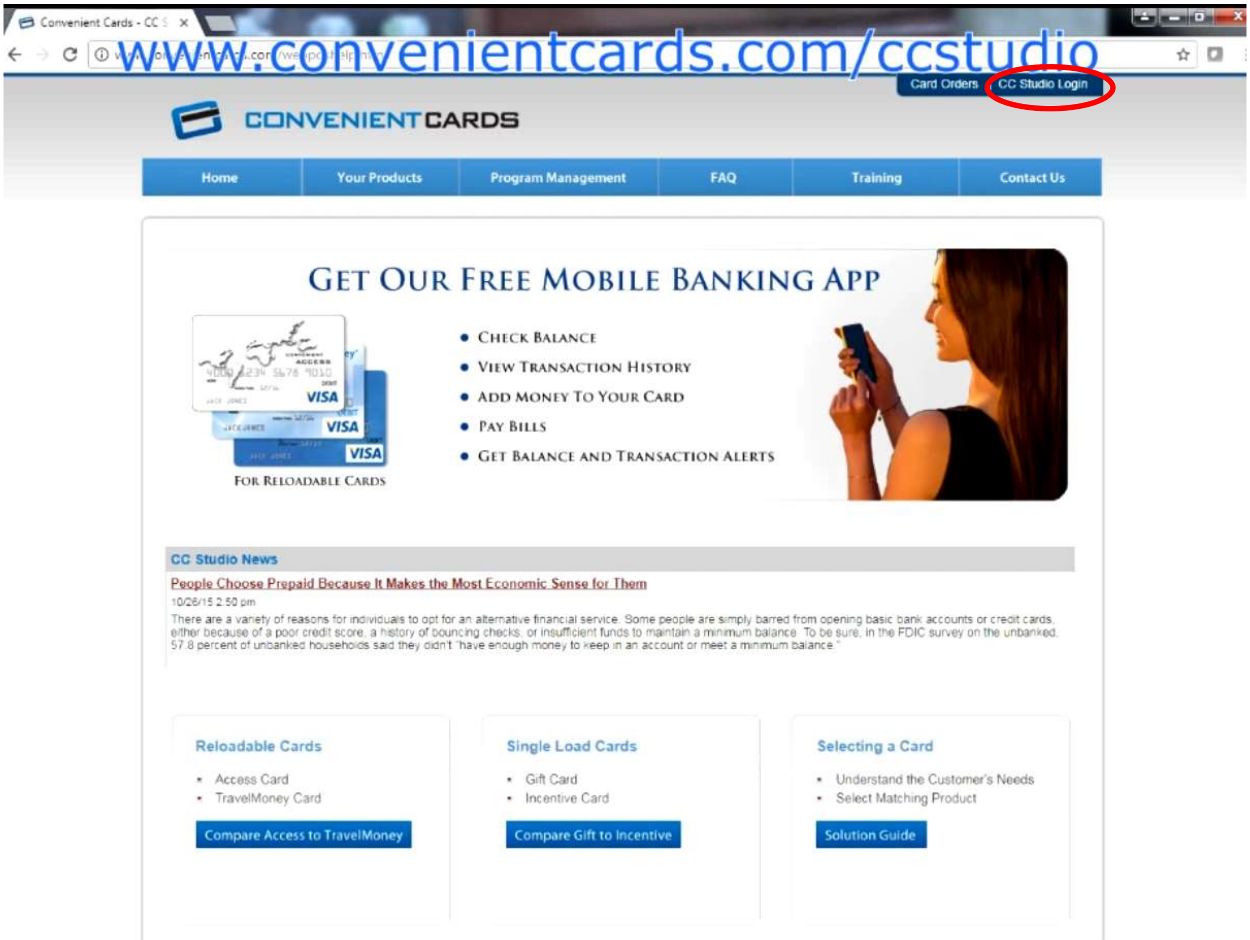
End User Training

CC Studio

Convenient Cards
CC Studio Training

Table of Contents

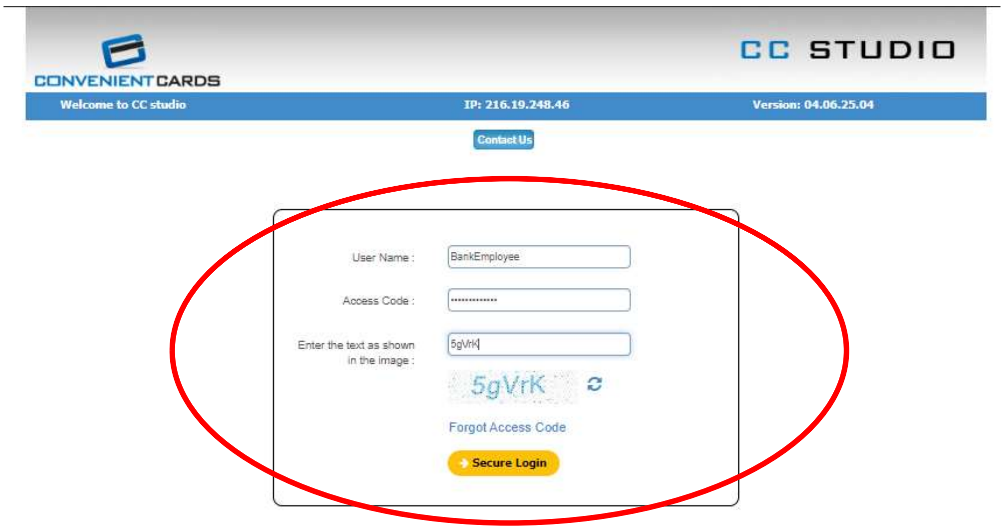
The Launch Page



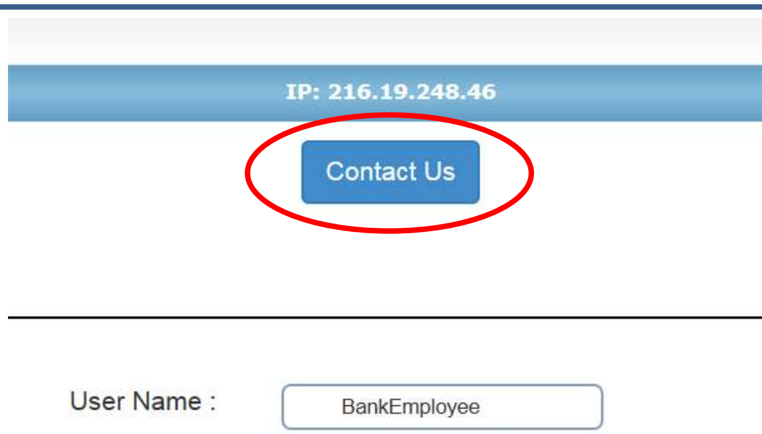
The first step in using CC Studio is going to the Convenient Cards launch page by going to www.convenientcards.com/CCstudio. It may be useful to create a shortcut on your desktop that takes you directly to this page. The launch page, as you will find, contains a large amount of useful information and material.

From the launch page, select CC studio login in the upper right corner of the screen. This will take you to the CC Studio login page. We recommend you begin at the launch page every time you log in. This link is the shortest way to get to the CC Studio log in page

Logging In

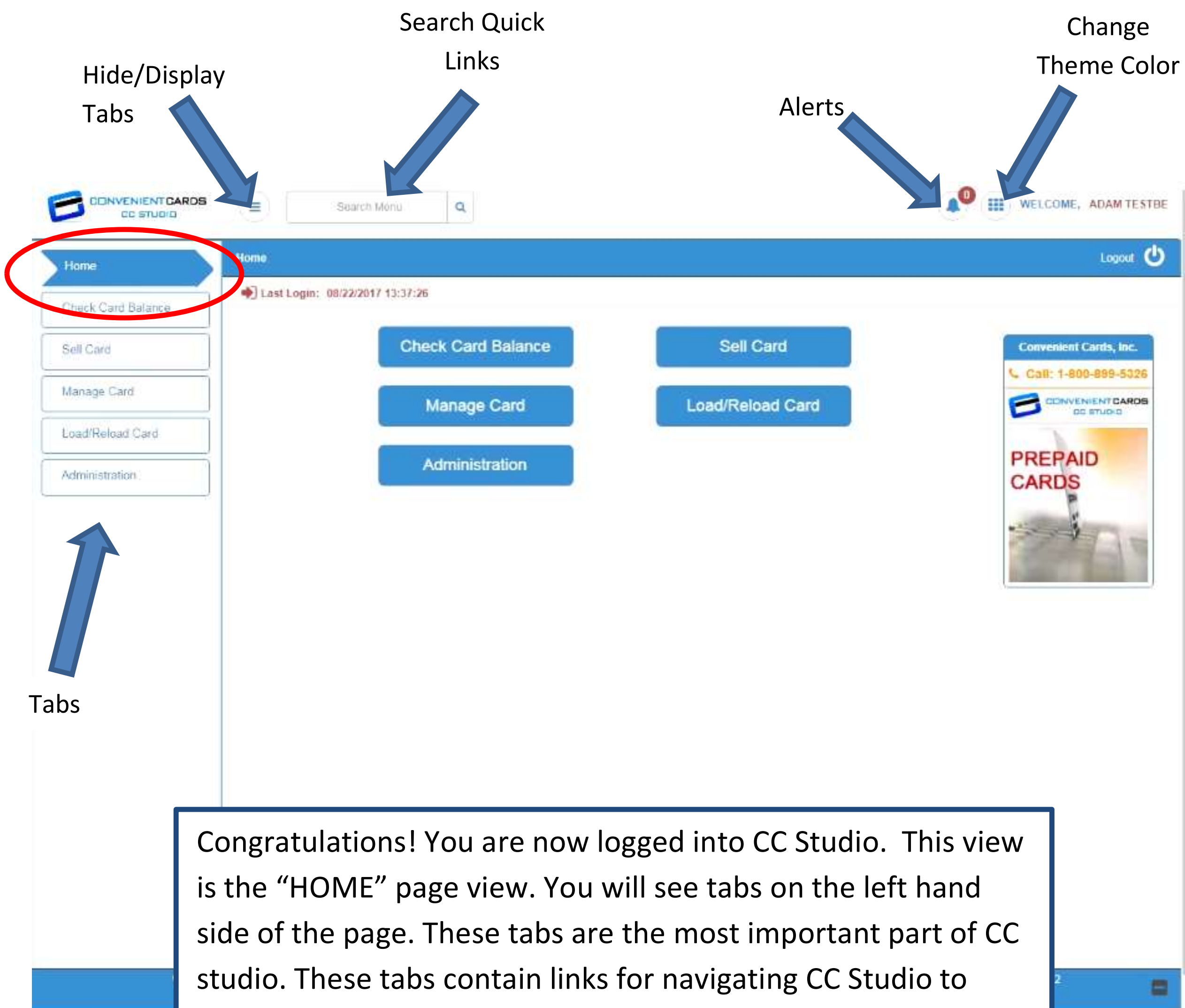


To log into CC Studio, you will need your ***username*** and ***access code*** that have been provided to you. Enter your username & access code and fill in the provided captcha, then click "Secure Login".



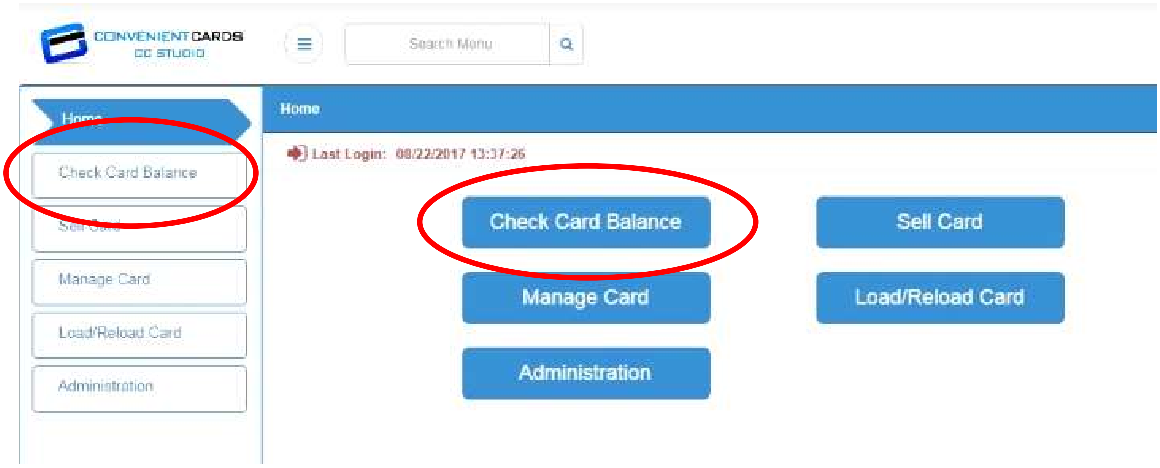
Click the "Contact Us" button above the login box if you need assistance logging in.

Introduction to CC Studio

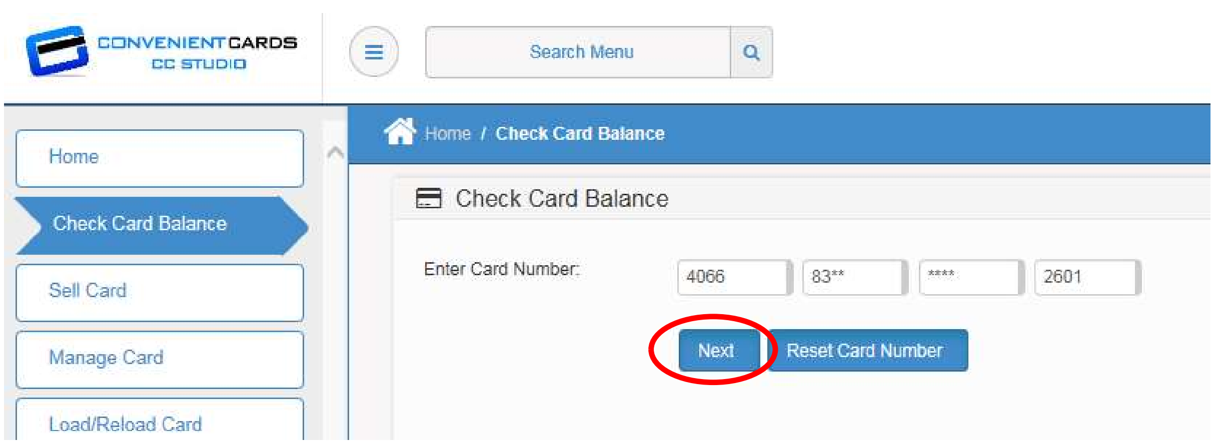


Congratulations! You are now logged into CC Studio. This view is the "HOME" page view. You will see tabs on the left hand side of the page. These tabs are the most important part of CC studio. These tabs contain links for navigating CC Studio to perform functions like "Check Card Balance, Sell Card, Manage Card, Load/Reload Card and Administration." These links may also be found on the "HOME" tab view, shown here.

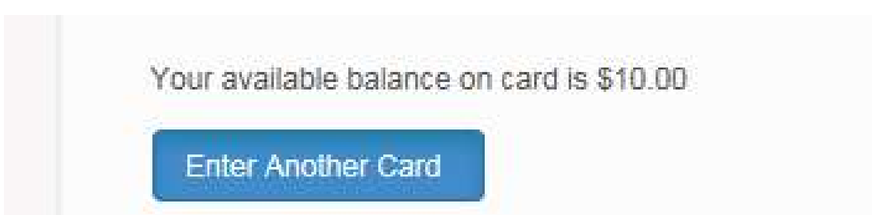
Checking Card Balance



To check a card balance, click the “Check Card Balance” tab on the sidebar on the left of the page or the “Check Card Balance” button in the middle of the “HOME” page.

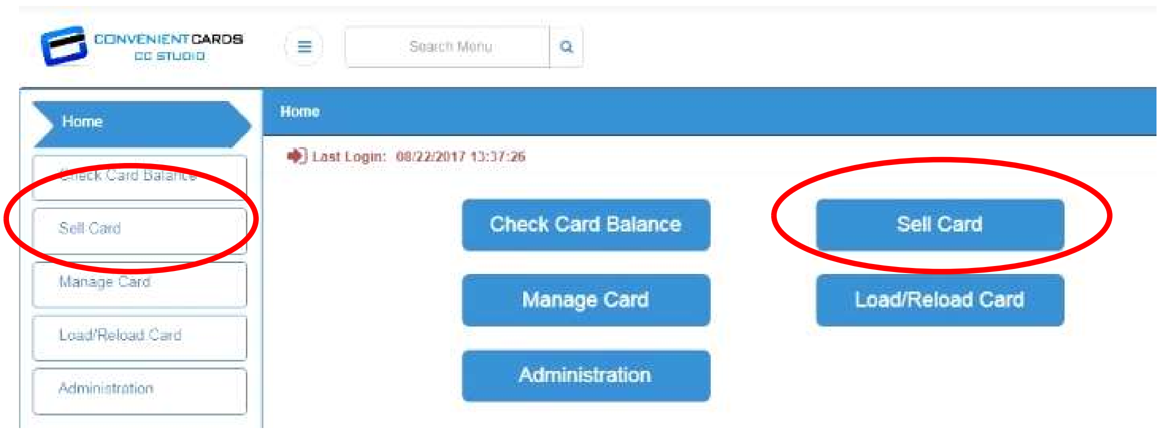


You will then be prompted to enter a card number. Once you’ve entered the card number you may click “Next” to reveal the card balance.

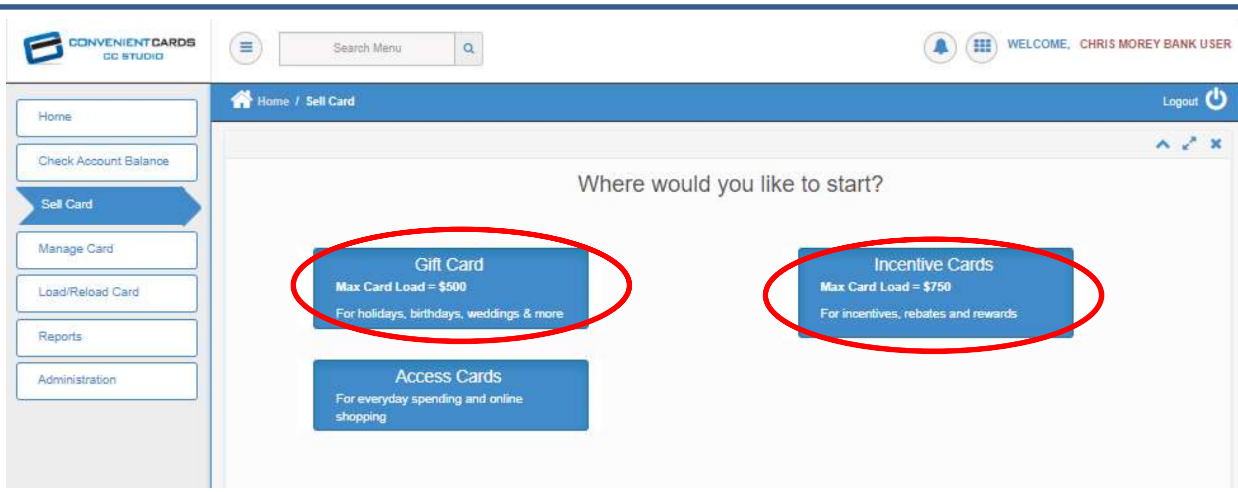


Selling Gift & Incentive Cards

Activating and Loading a Single Gift/Incentive Card

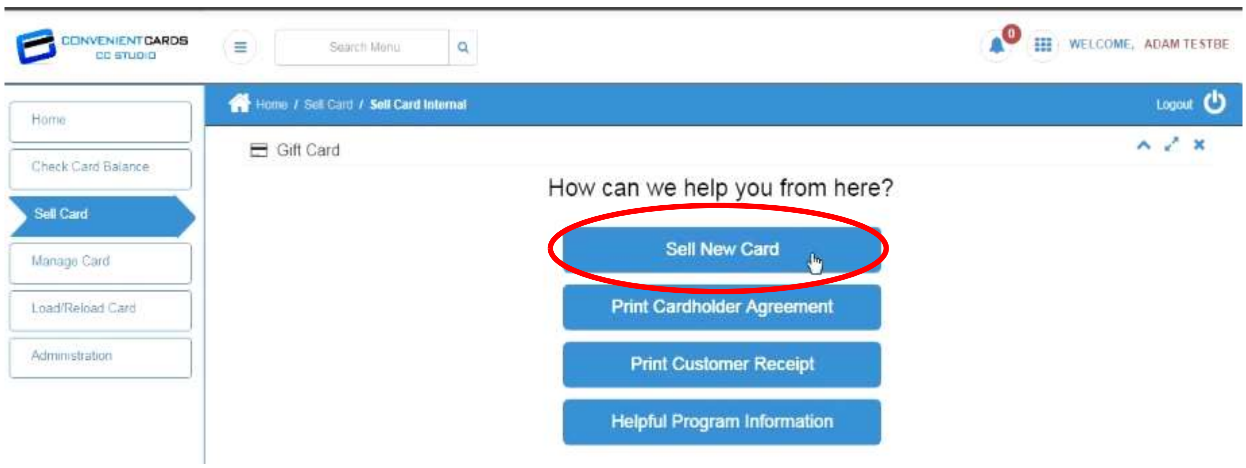


To sell a Gift Card or Incentive Card, click the "Sell Card" tab on the sidebar on the left of the page or the "Sell Card" button on the right of the "HOME" page.

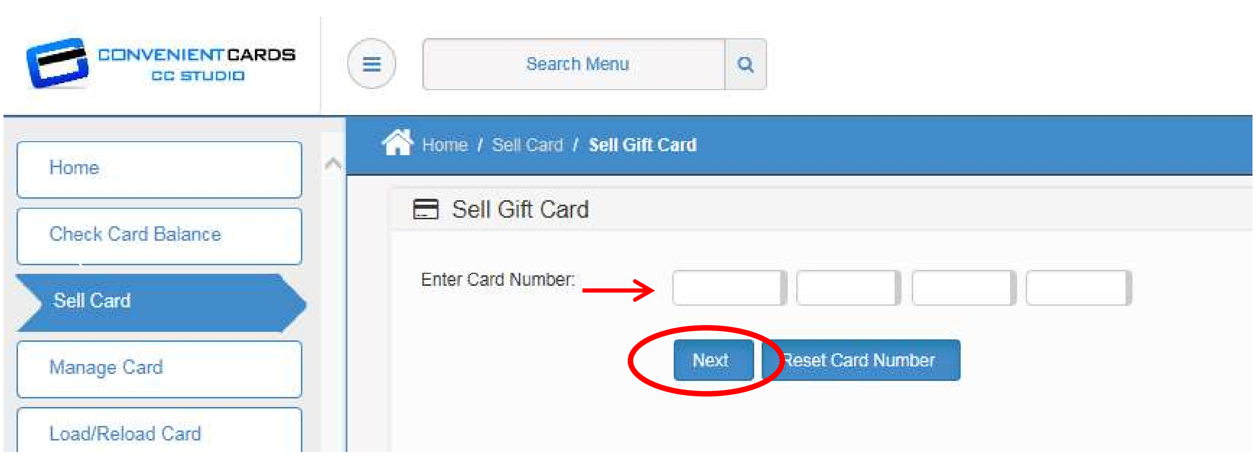


Here you may select "Gift Card" or "Incentive Card."

Selling Gift & Incentive Cards

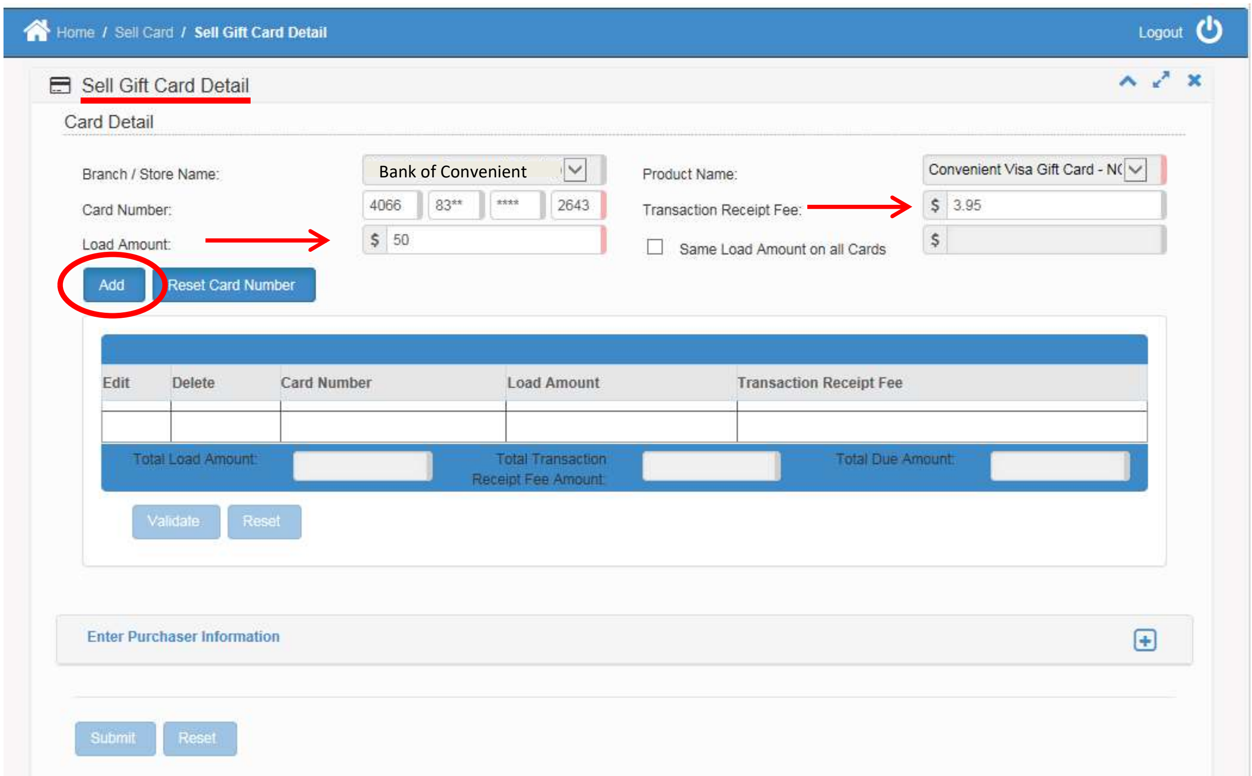


After selecting Gift Card or Incentive Card, we see links to Sell New Card, Print Cardholder Agreement, Print Customer Receipt, and Helpful Program Information. Click “Sell New Card” to sell a card.



You will then enter the card number that you would like to activate and load and click “Next.”

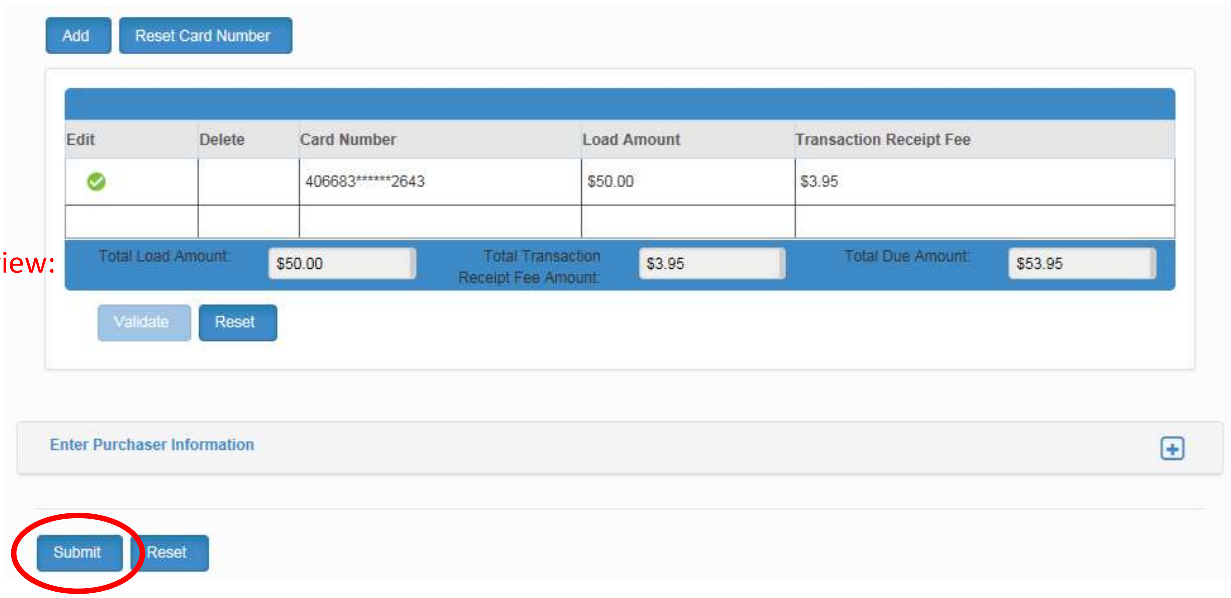
Selling Gift & Incentive Cards



You will then see the "Sell Gift Card/Incentive Card Detail" Page. You will notice that the required fields are noted with a highlighted right edge in red. The Branch/Store Name is already filled out with your bank information, as well as the card number (you just entered). Enter the amount you would like to load the card in the "Load Amount" field. The "Transaction Receipt Fee" field is strictly used to show your bank's activate and load fee on your customer receipt. This is the amount you charge your customers for the purchase and activation of a Gift/Incentive Card. You will type in this determined fee amount set by your bank here. This amount is not deducted from the load amount nor is it debited from your bank's funding account. Once you've entered in all the information, click "Add."

Selling Gift & Incentive Cards

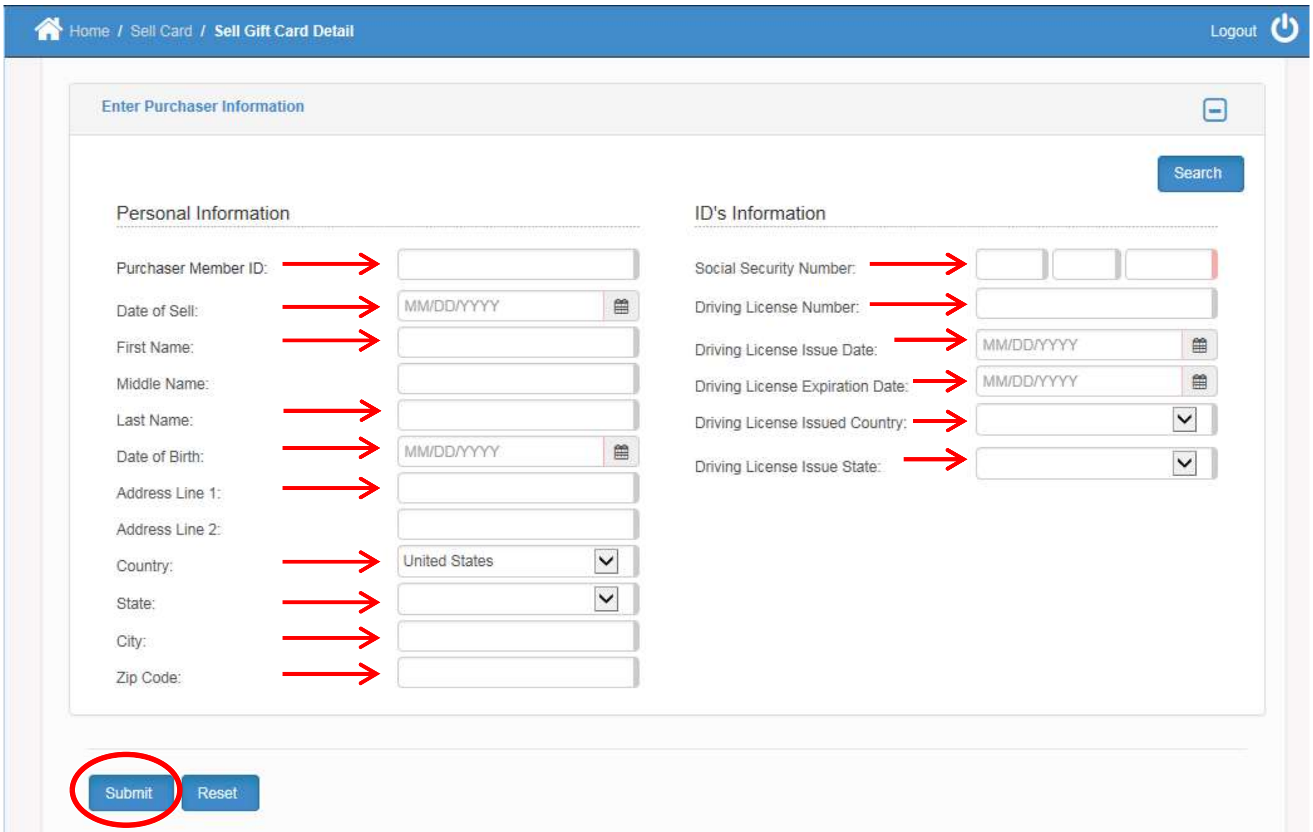
Review:



After you have clicked “Add” the card will be added to the table below the “Add” Button. For your convenience, you may ***review*** the Total Load Amount, Total Transaction Receipt Fee and Total Due Amount on the bottom of this section. The next step is to capture purchaser information. As this step is optional, you may choose to continue without adding purchaser information by selecting “Submit” once you have reviewed the transaction totals.

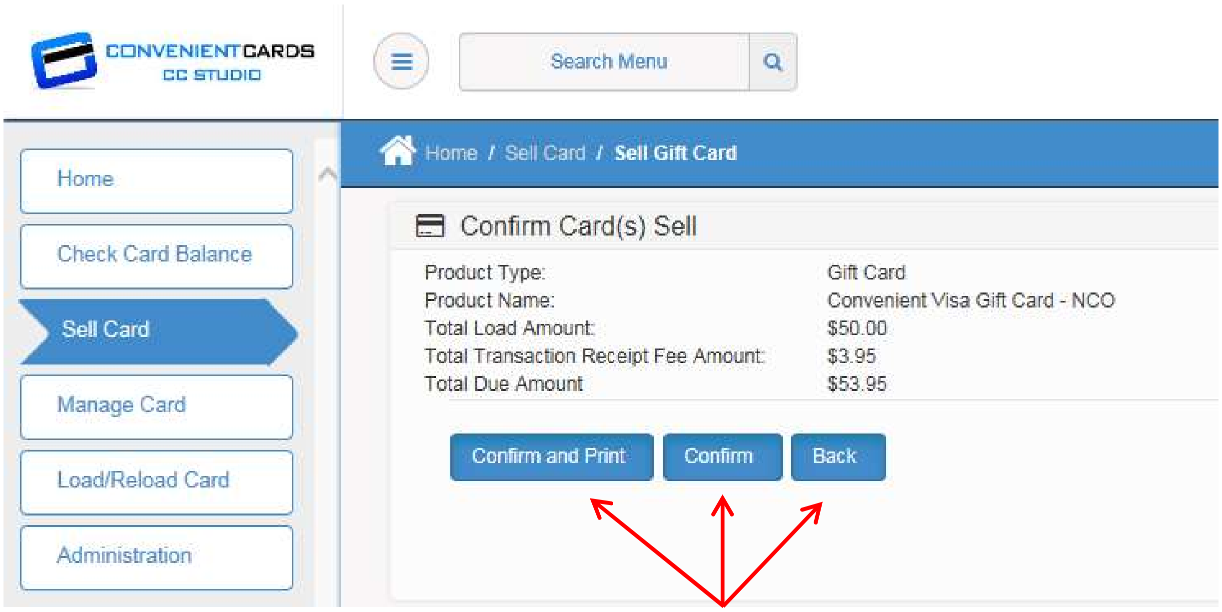
OPTIONAL - For BSA tracking, you may capture Gift/Incentive Card Purchaser information. Expand the “Enter Purchaser Information” section to enter in Card purchaser information to retain for your records.

Selling Gift & Incentive Cards



Here you may enter in "Purchaser Member ID, Date of Sale, Purchaser Name, Purchaser Date of Birth," and "Purchaser Address" including "State, City" and "Zip Code." For more specific record retention, you also have the ability to capture the purchaser "Social Security Number, Driving License Number, Driving License Issue Date, Driving License Expiration Date, Driving License Country," and "Driving License State". This information is purely optional and to be used by your bank for internal tracking of gift card purchasers. The information captured here, is only used for your bank and does not personalize the card at the time of purchase. Once you are finished, select "Submit."

Selling Gift & Incentive Cards

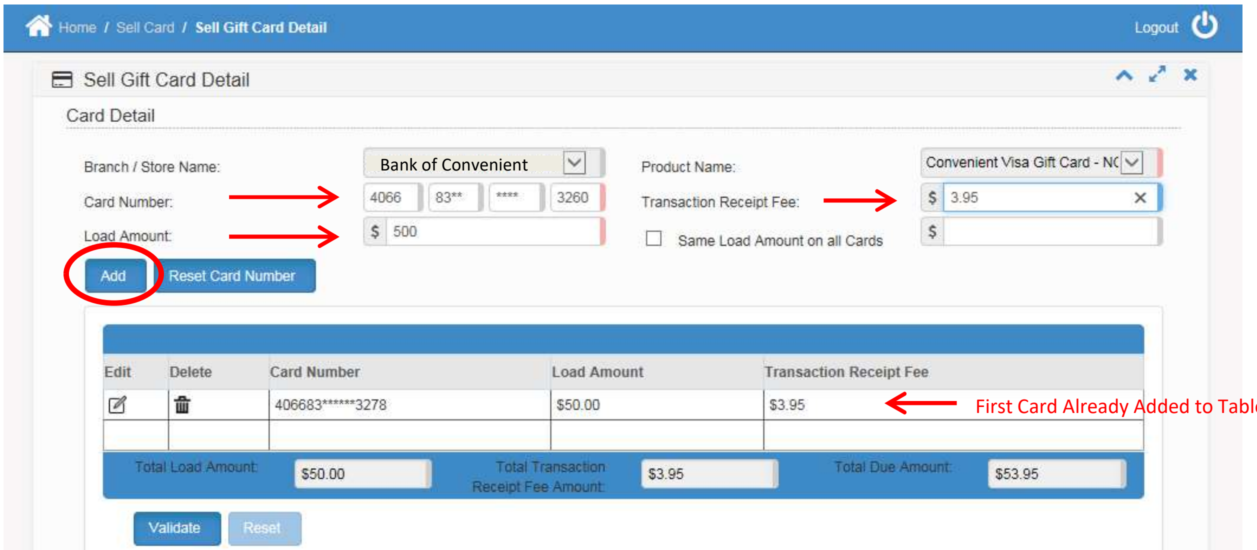


You now see a screen in which you may select "Confirm and Print" or "Confirm" to finalize the transaction. If you would like a receipt, be sure to select "Confirm and Print." Selecting the "Back" button available here, allows you to make any corrections to your card transaction.

Once "Confirm and Print" or "Confirm" is selected, the card will be activated and loaded.

Selling Gift & Incentive Cards

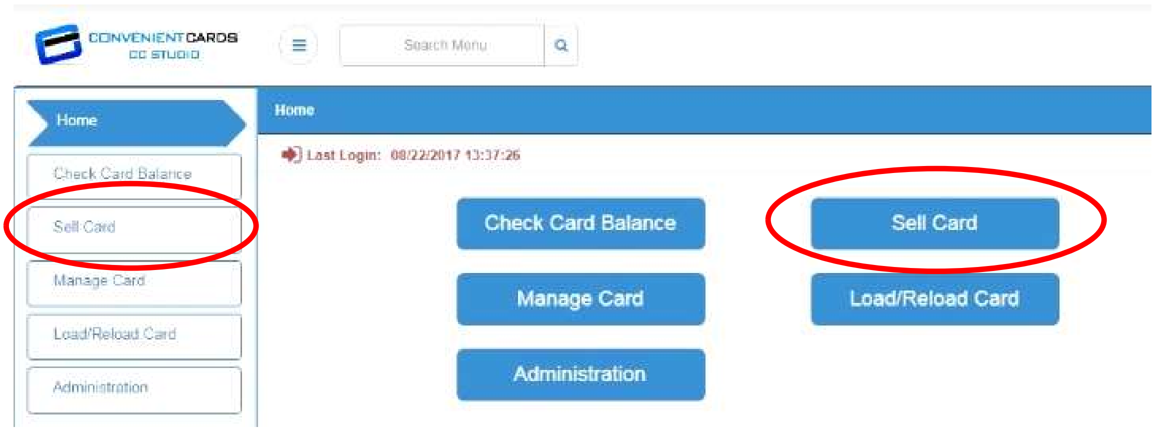
Activating and Loading Multiple Gift/Incentive Cards in Same Transaction



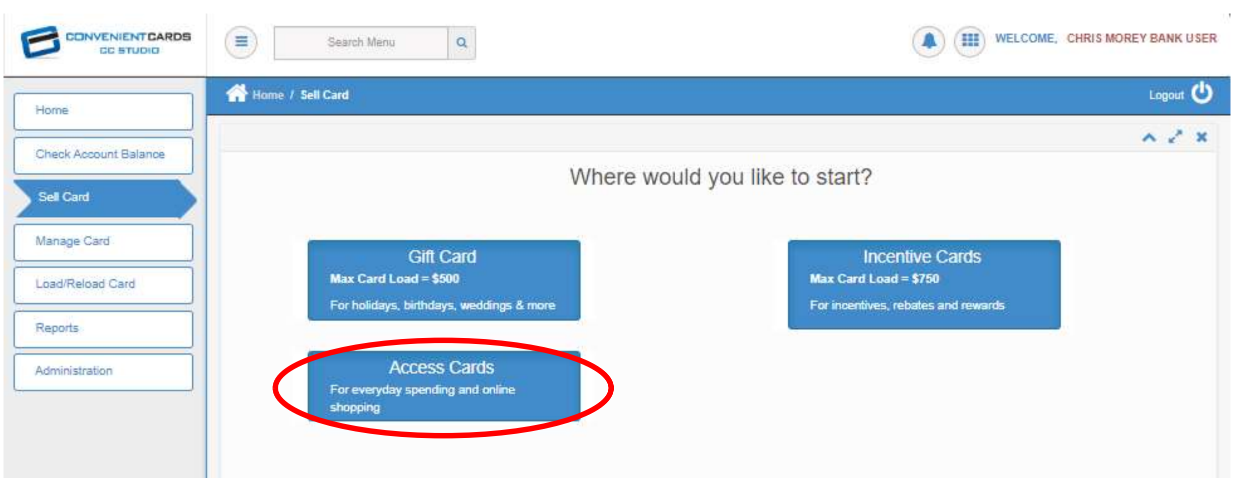
Once you have entered in your first card and selected “Add” you will see it displayed in the table below the “Add” button. To add another card in the same transaction, simply enter in a new card number and enter in your load amount. Once you have done this click “Add”.

Your additional card will be added to the table. You may repeat this step to add however many additional cards you would like to activate and load.   Next, you will click “Validate”. Validation is used as a double check for you to review the card loads and fees, as well for our system to confirm that the cards are valid and ready to be sold. If they are valid, you will see a green check in the edit column. Once you have validated the transaction you may now click “Submit”. Again, you will have the option to “Confirm” or “Confirm and Print” to finalize the transaction, or “Back” to review transaction details.

Selling Access Cards

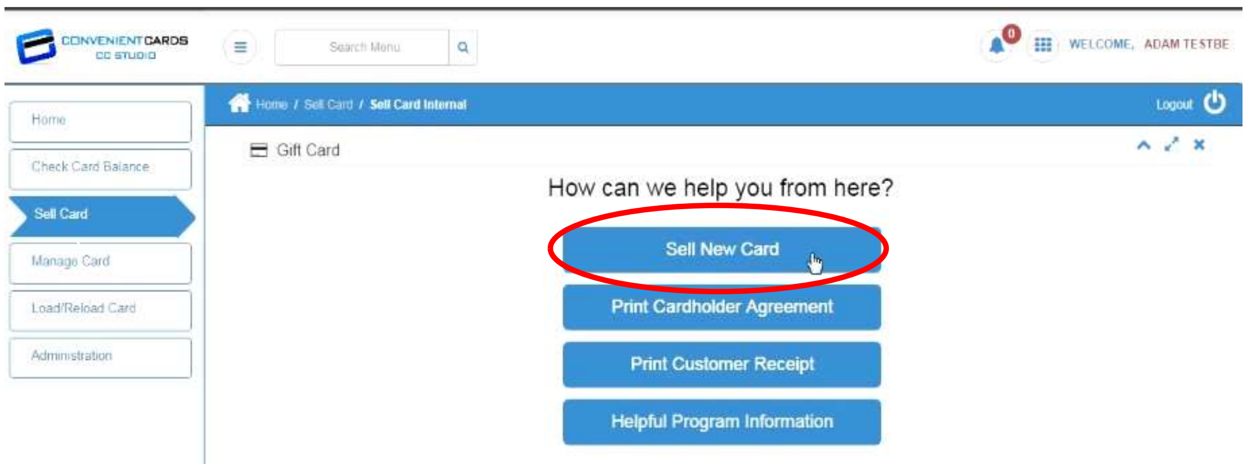


To sell an Access Card, click the “Sell Card” tab on the sidebar on the left of the page or the “Sell Card” button on the right of the “HOME” page.

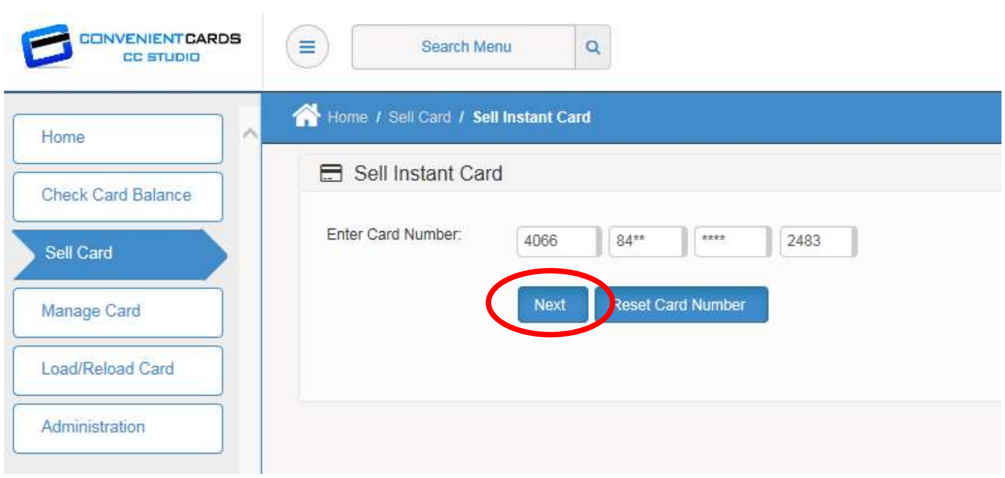


Here, select “Access Cards”.

Selling Access Cards

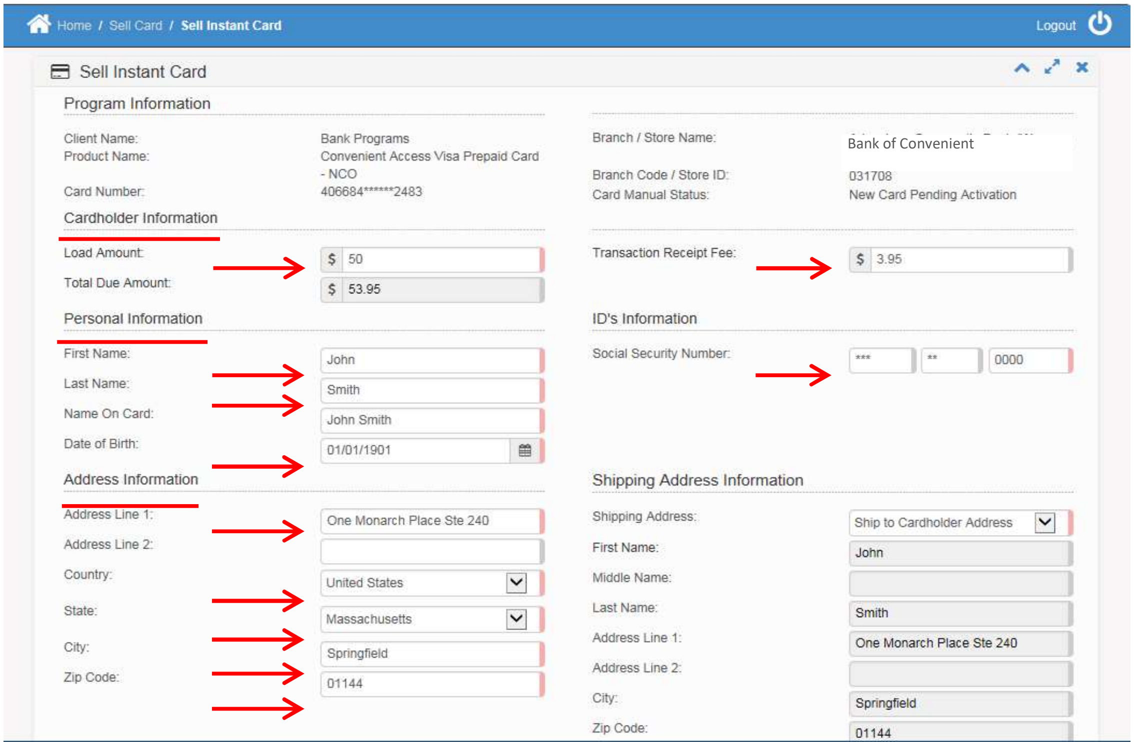


After selecting Access Cards, we see links to Sell New Card, Print Cardholder Agreement, Print Customer Receipt, and Helpful Program Information. Click “Sell New Card” to sell a card.



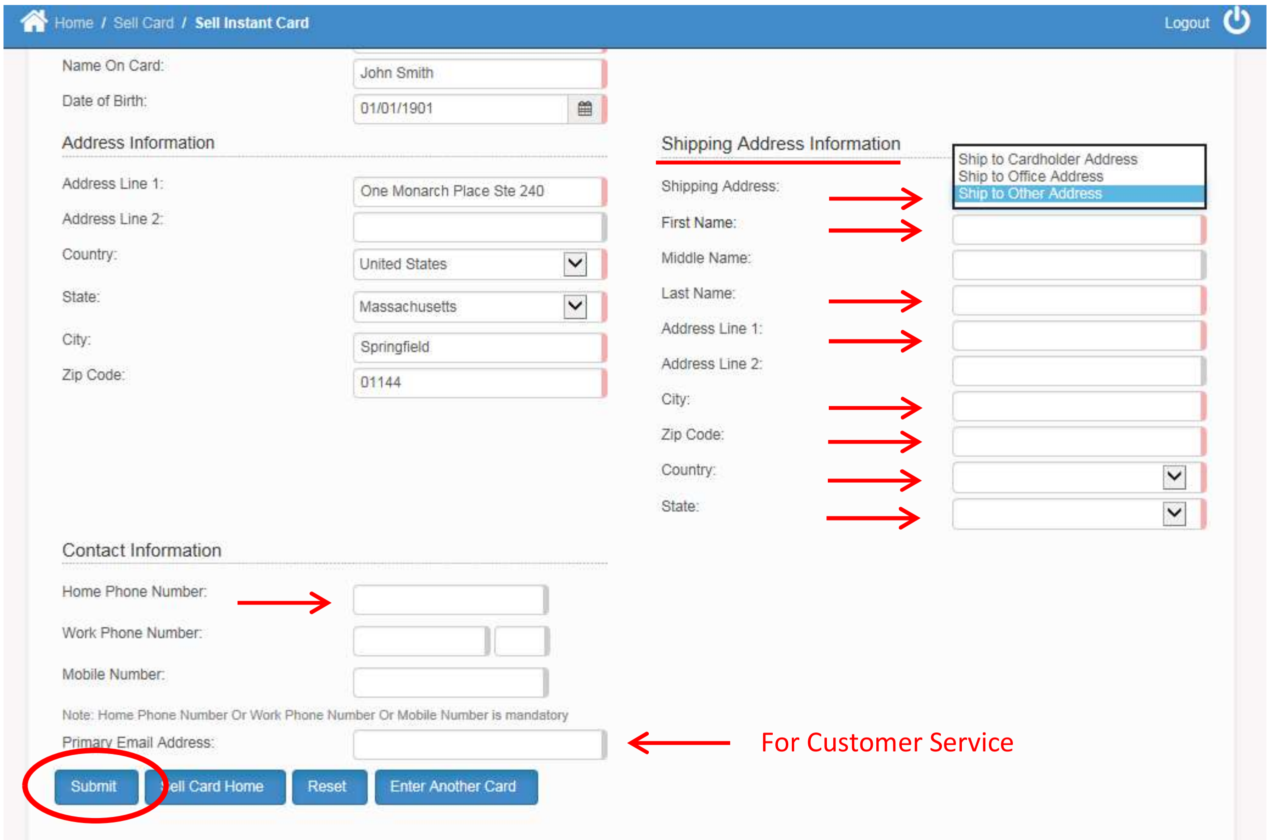
You will then enter the card number that you would like to activate and load and click “Next”.

Selling Access Cards



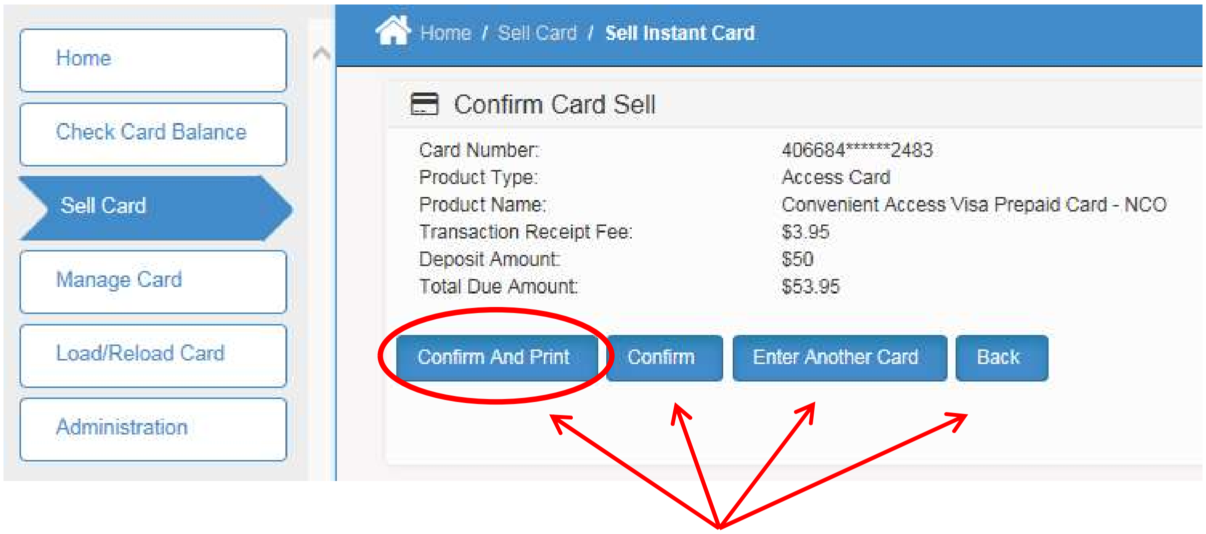
Enter in the desired "Load Amount" under Cardholder Information. The "Transaction Receipt Fee" field is strictly used to show your bank's activate and load fee on your customer receipt. This is the amount you charge your customers for the purchase and activation of a Access Card. You will type in this determined fee amount set by your bank here. This amount is not deducted from the load amount nor is it debited from your bank's funding account. Under Personal Information, enter in the required information which is highlighted on the right of the field in red. This information is "First Name, Last Name, Date of Birth, Social Security Number and phone". Note that the "Name on Card" field automatically populates with the cardholders first and last name you have entered. Next, the Address Information requires a physical "Address, Country, State, City, and Zip Code". PO Boxes will not work.

Selling Access Cards



If the cardholder has a PO Box, or different Shipping Address than their physical address, you may fill out additional shipping information in the "Shipping Address Information" section by selecting "Ship to Other Address" in the drop down. After you have entered this information you will then be required to enter in at least one phone number below. Any additional information including email address will be used only for customer service purposes. Once you've entered all the information, and confirmed that you have filled out all required fields, you will hit "Submit" to finalize the transaction.

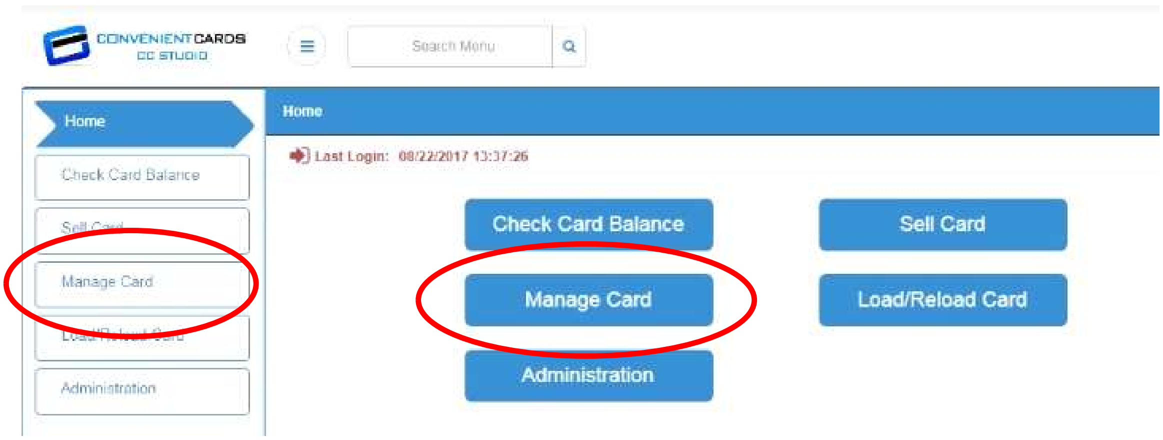
Selling Access Cards



On this page, press "Confirm and Print" to complete the transaction and print receipt. If a receipt is not needed you may simply press "Confirm". If you click "Enter Another Card" you will cancel your current transaction and the system will let you activate and load a new card. If you need to make any revisions to the information displayed here before you confirm, you may hit the "Back" button to make those corrections.

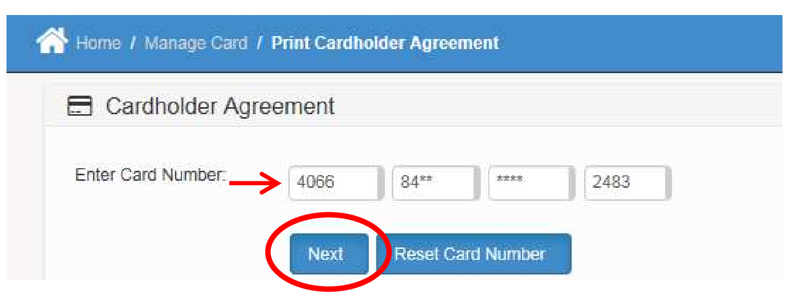
Once "Confirm and Print" or "Confirm" is selected, the card will be activated and loaded.

Manage Card



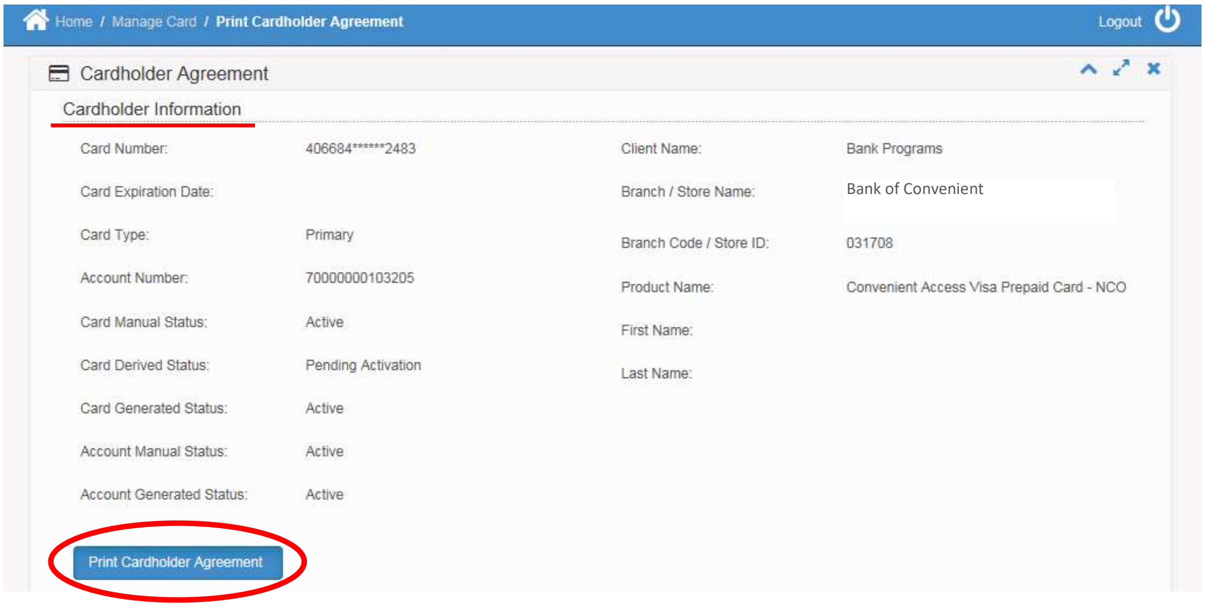
The “Manage Card” tab pulls up a menu of card options for the program. Select the “Manage Card” tab on the left or the “Manage Card” button in the middle of the “HOME” page.

You will find two options under Manage Card, “Print Cardholder Agreement” and “Print Customer Receipt”. To print a Cardholder Agreement for any card within the program, select “Print Cardholder Agreement.”



You will see the “Enter Card Number” field. Enter in the card number you would like to receive the cardholder agreement for, and click “Next.”

Manage Card

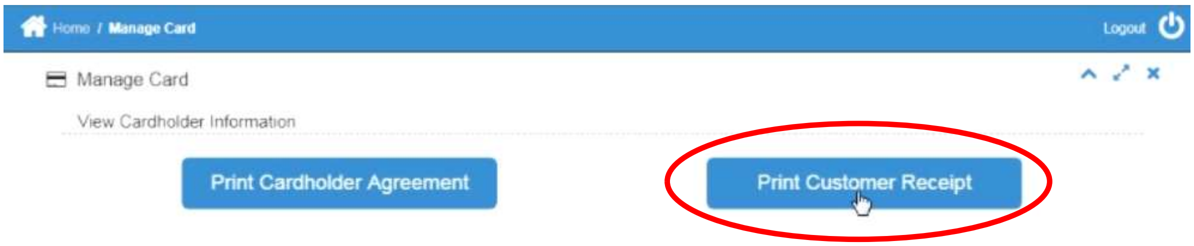


You will then see the Cardholder Information screen showing the card information on the card you are looking up the Cardholder Agreement. To download a printable PDF of the cardholder agreement you will click “Print Cardholder Agreement”.

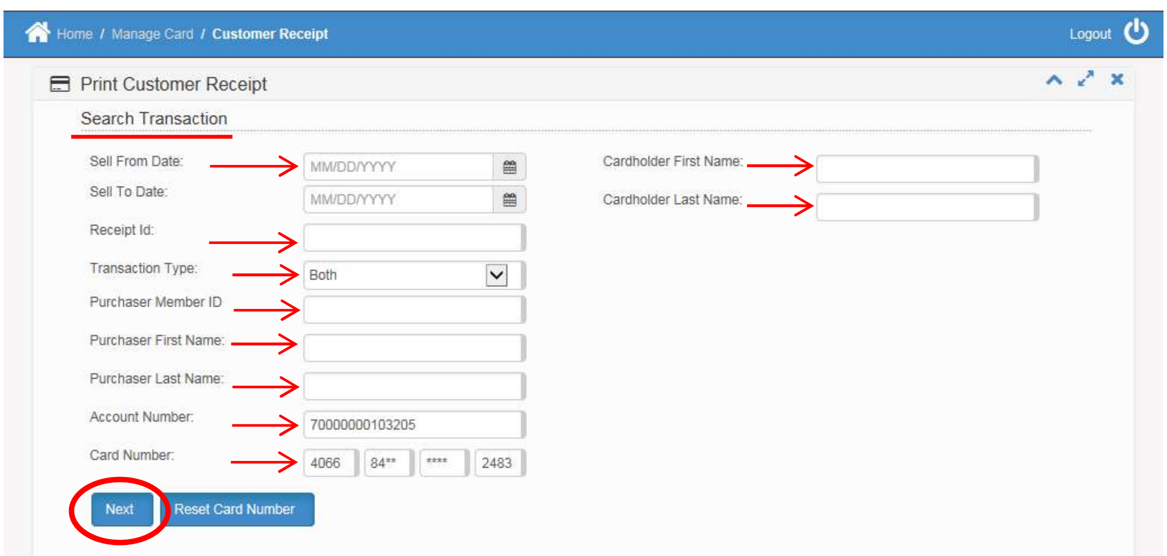
A confirmation should pop up asking if you would like to print the agreement. Select “Yes” to start the download.

Once your PDF has downloaded, you may open it for printing.

Manage Card

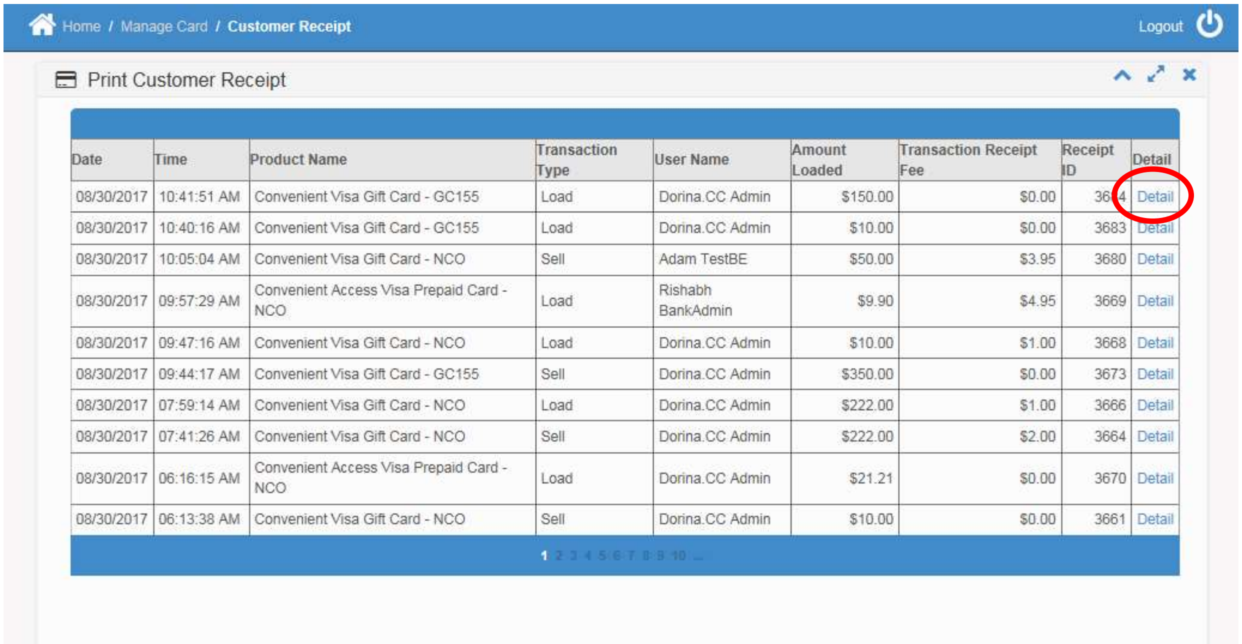


Back under your Manage Card option we will now select "Print Customer Receipt".



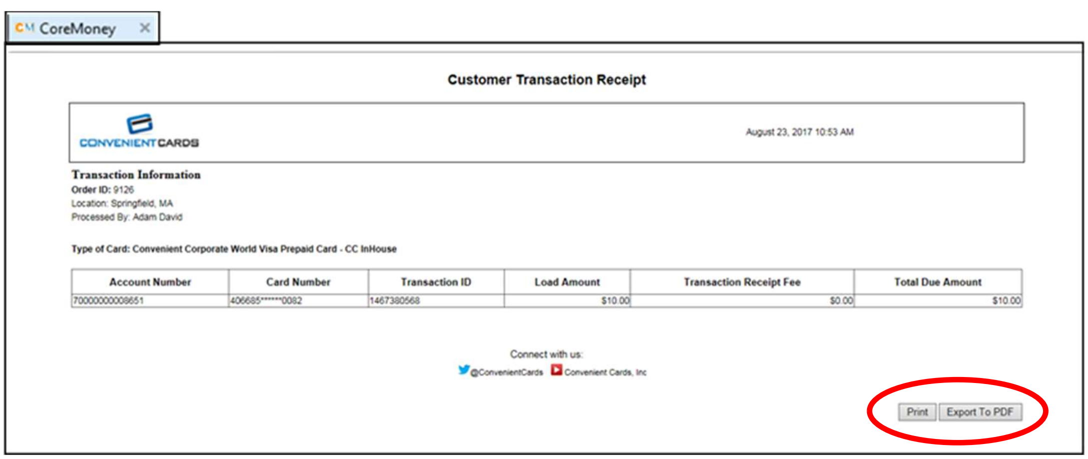
In the Search Transaction screen you will see that you may search for a previous transaction receipt by selecting from the search criteria available. These include: "Date, Receipt ID, Transaction Type, Purchaser Member ID, Purchaser First Name, Purchaser Last Name, Account Number, Card Number, Cardholder First Name, and Cardholder Last Name". Once you have filled out the criteria you are looking for, click "Next" to start your search.

Manage Card



Date	Time	Product Name	Transaction Type	User Name	Amount Loaded	Transaction Receipt Fee	Receipt ID	Detail
08/30/2017	10:41:51 AM	Convenient Visa Gift Card - GC155	Load	Dorina.CC Admin	$150.00	$0.00	36[illegible]4	Detail
08/30/2017	10:40:16 AM	Convenient Visa Gift Card - GC155	Load	Dorina.CC Admin	$10.00	$0.00	3683	Detail
08/30/2017	10:05:04 AM	Convenient Visa Gift Card - NCO	Sell	Adam TestBE	$50.00	$3.95	3680	Detail
08/30/2017	09:57:29 AM	Convenient Access Visa Prepaid Card - NCO	Load	Rishabh BankAdmin	$9.90	$4.95	3669	Detail
08/30/2017	09:47:16 AM	Convenient Visa Gift Card - NCO	Load	Dorina.CC Admin	$10.00	$1.00	3668	Detail
08/30/2017	09:44:17 AM	Convenient Visa Gift Card - GC155	Sell	Dorina.CC Admin	$350.00	$0.00	3673	Detail
08/30/2017	07:59:14 AM	Convenient Visa Gift Card - NCO	Load	Dorina.CC Admin	$222.00	$1.00	3666	Detail
08/30/2017	07:41:26 AM	Convenient Visa Gift Card - NCO	Sell	Dorina.CC Admin	$222.00	$2.00	3664	Detail
08/30/2017	06:16:15 AM	Convenient Access Visa Prepaid Card - NCO	Load	Dorina.CC Admin	$21.21	$0.00	3670	Detail
08/30/2017	06:13:38 AM	Convenient Visa Gift Card - NCO	Sell	Dorina.CC Admin	$10.00	$0.00	3661	Detail

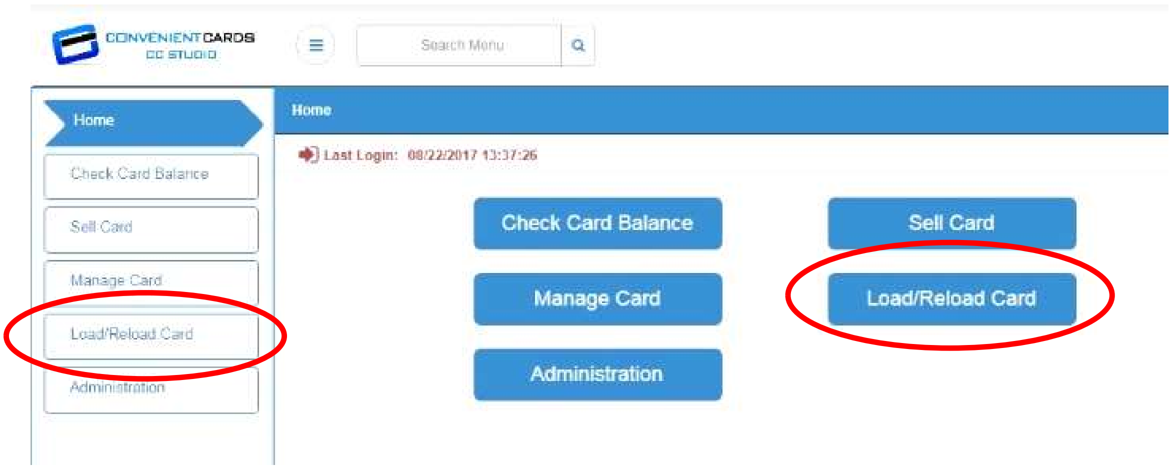
Now you have a screen that shows a summary of transactions that fit your selected search criteria. When you find the transaction receipt that you would like to print, click "Detail" for a customer receipt. The receipt will open in a window with an option to "Print" or "Export to PDF".



Account Number	Card Number	Transaction ID	Load Amount	Transaction Receipt Fee	Total Due Amount
70000000008651	406685******0082	1467380568	$10.00	$0.00	$10.00

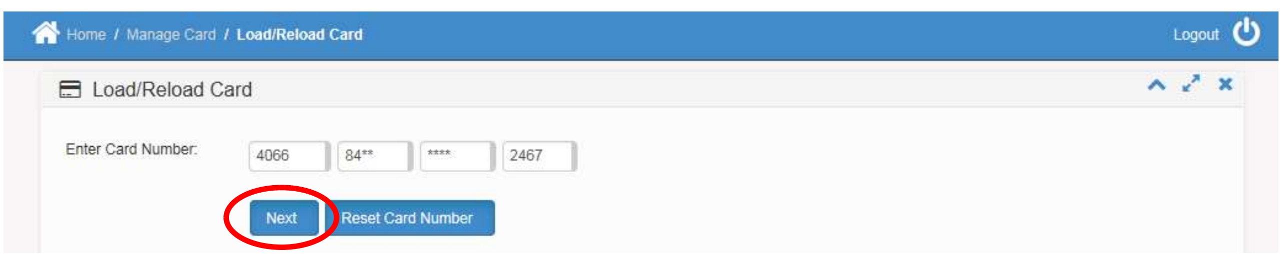
The receipt will open in a window with an option to "Print" or "Export to PDF".

Reloading Access Cards



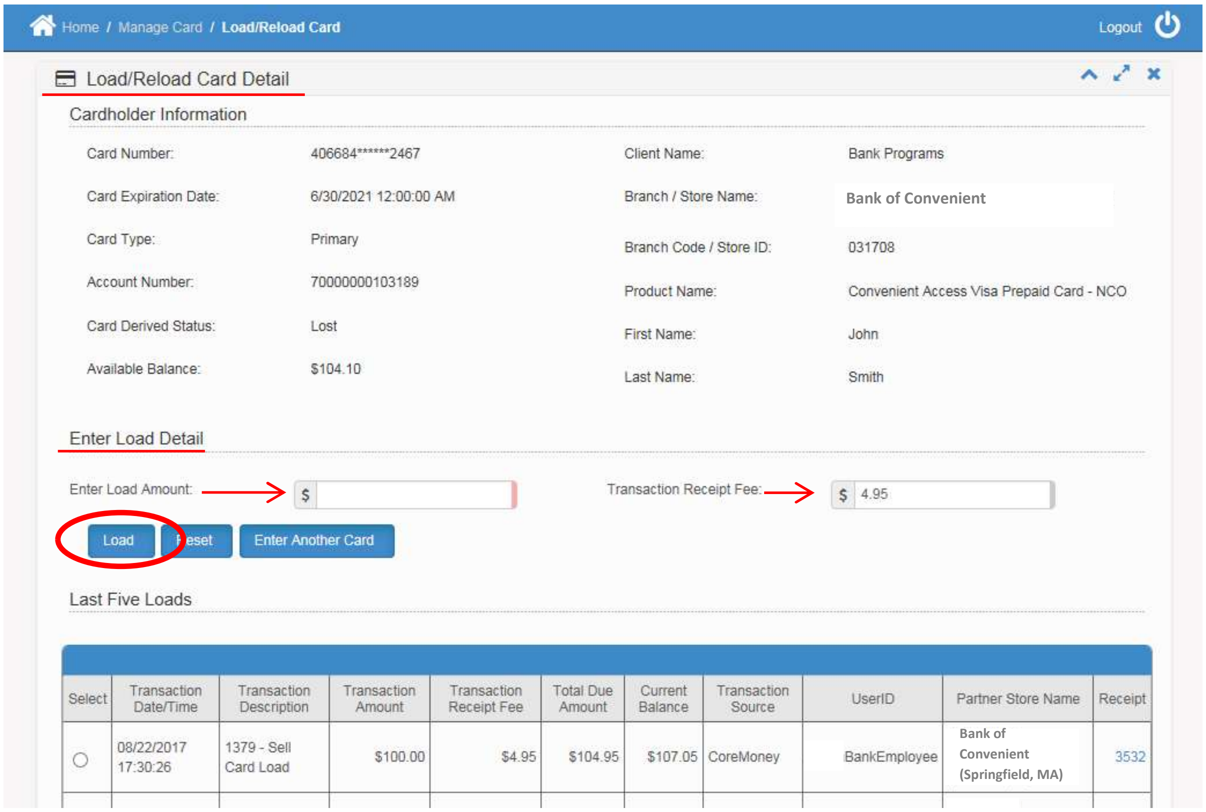
*****THIS OPTION WILL NOT ACTIVATE AND LOAD (SELL) CARDS*****

To reload a customer's Access Card, click the "Load/Reload Card" tab on the sidebar on the left of the page or the "Load/Reload Card" button in the right of the "HOME" page.



You are now taken to the "Enter Card Number" screen. Here, you may enter in the Access Card number you would like to reload and click "Next".

Reloading Access Cards



On this page, you will see the “Load/Reload Card Detail”. Displayed here is a summary of cardholder information on the card you have entered to reload. Double check that you are reloading the correct card.

Under the “Enter Load Detail” section, you will enter the amount to be reloaded on the card in the “Enter Load Amount” field. CC Studio will automatically debit this reload amount, plus $3.95 for each reload transaction.

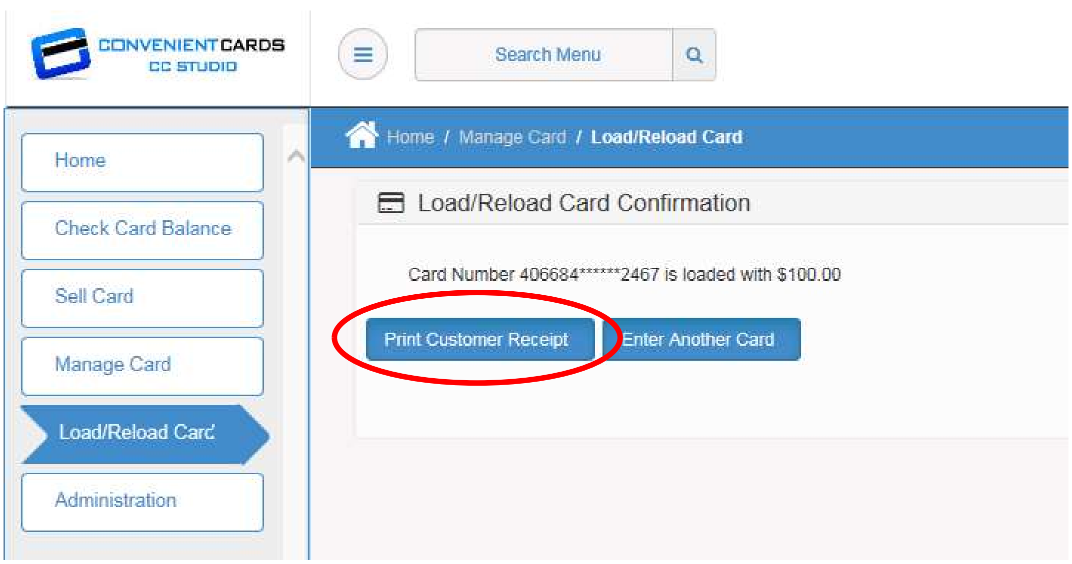
As the bank may retain an additional $1.00 per reload, you have the option of entering an amount between $3.95 - $4.95 in the “Transaction Receipt Fee” field. The “Transaction Receipt Fee” field is strictly used to ***display*** the Reload Fee on your customer receipt printout. This will allow you to show the correct fee amount assessed for the transaction on your customer receipt.

IMPORTANT The amount entered in the “Transaction Receipt Fee” will ***not*** be deducted from the load amount, nor is it used to determine the total debit from your bank’s funding account for the transaction.

Once you have entered in the information in the two fields, you may press “Load”.

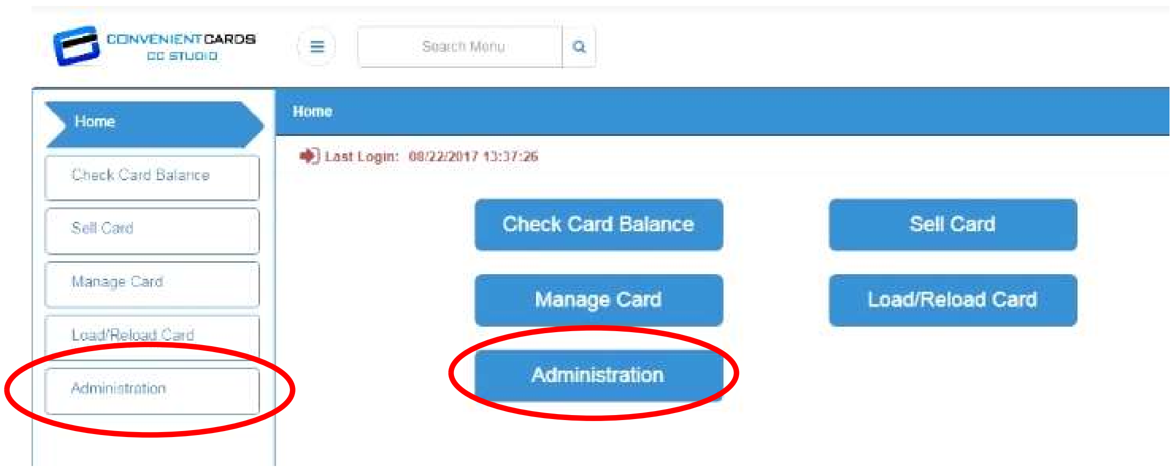
Reloading Access Cards

Now, you may confirm that you would like to complete the reload transaction by pressing "Yes" on the window that pops up.

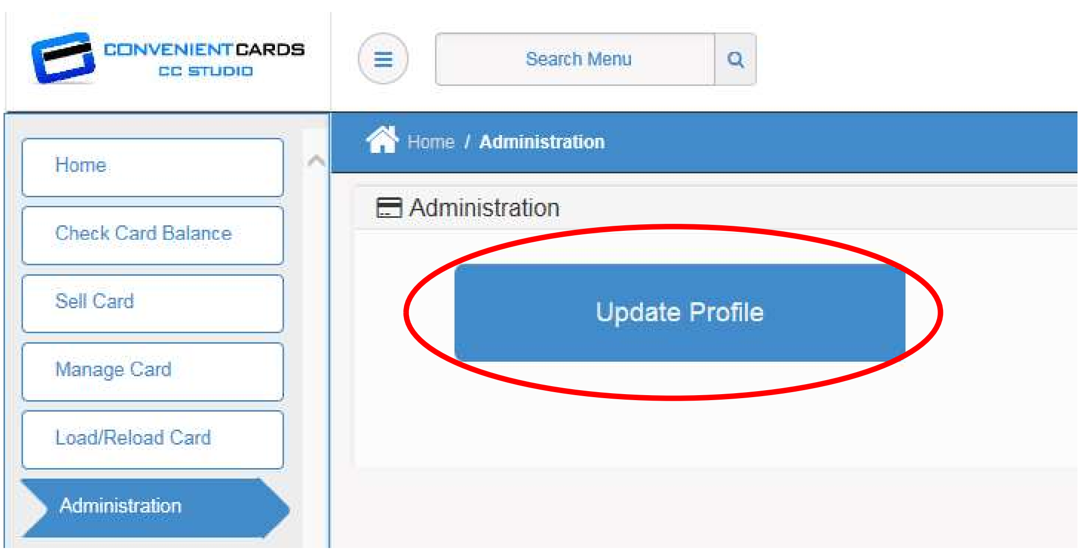


Once you have confirmed the transaction, you will receive a "Load/Reload Card Confirmation" displaying the masked card number and the reload amount. You may select "Print Customer Receipt" to print a receipt of the transaction, or "Enter Another Card" to complete a reload on a different card.

Updating Profile

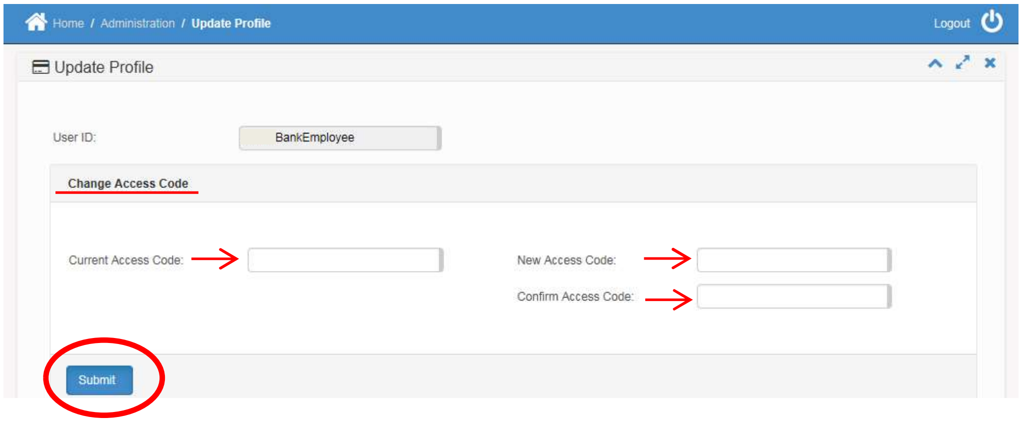


Let us check out the "Administration" tab. Click the "Administration" tab on the sidebar on the left of the page or the "Administration" button in the middle of the "HOME" page.

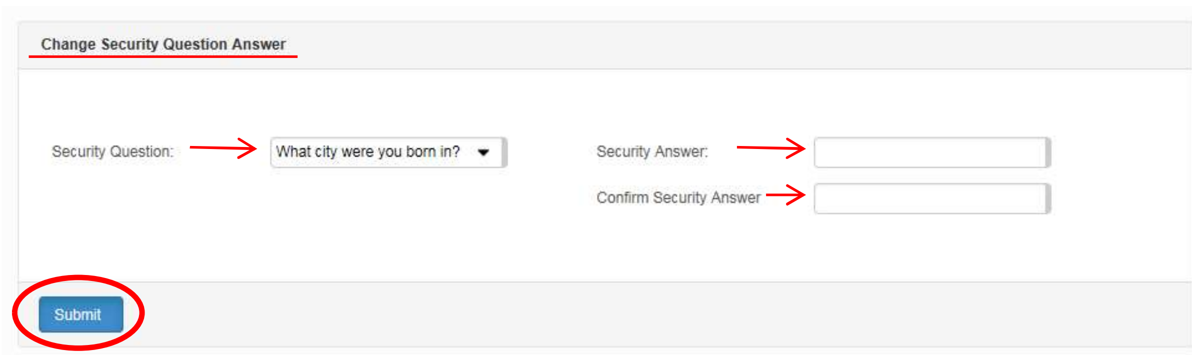


Under the Administration tab there is one option: "Update Profile". Select "Update Profile" to change your Access Code (Password), Security Answer, and Date of Birth/E-mail.

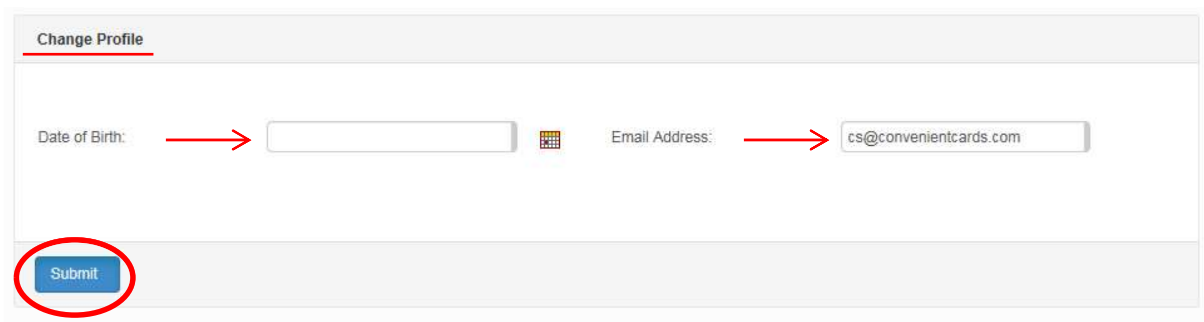
Updating Profile



"Change Access Code" is used to change your password you use to sign in to CC Studio. Type in your current password followed by your new password, and again to confirm. Click "Submit" to save your changes.

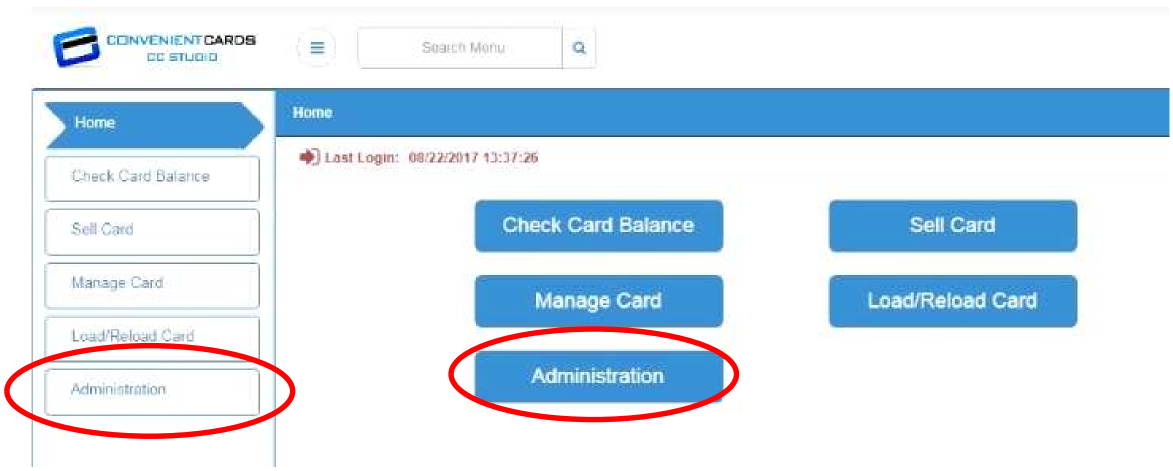


"Change Security Question Answer" will be used for password recovery. Select a security question from the drop down and enter in your answer to the question. Confirm your answer and click "Submit" to save your changes.

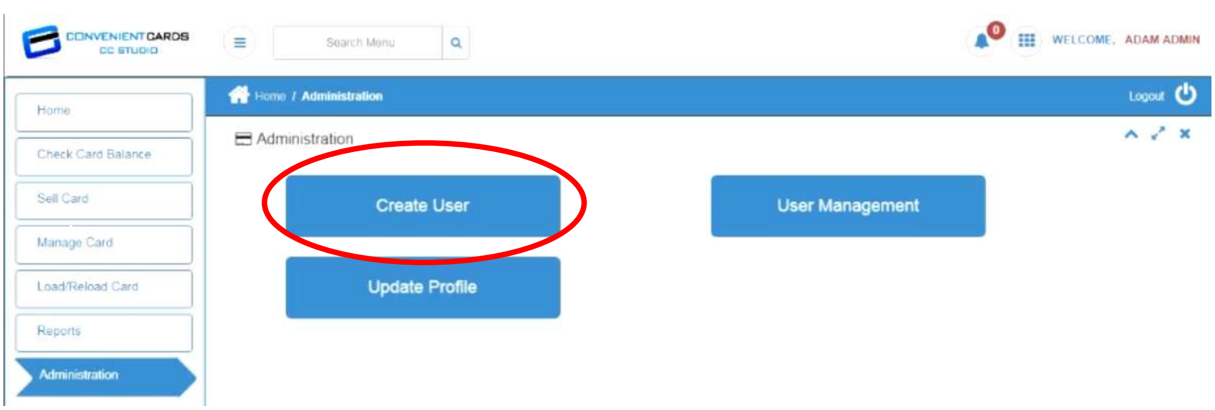


Last, in the Change Profile section you may enter in your "Date of Birth" and "Email Address". Click "Submit" to save your changes. Information stored in this section will become useful for verification purposes.

Bank Admin Role

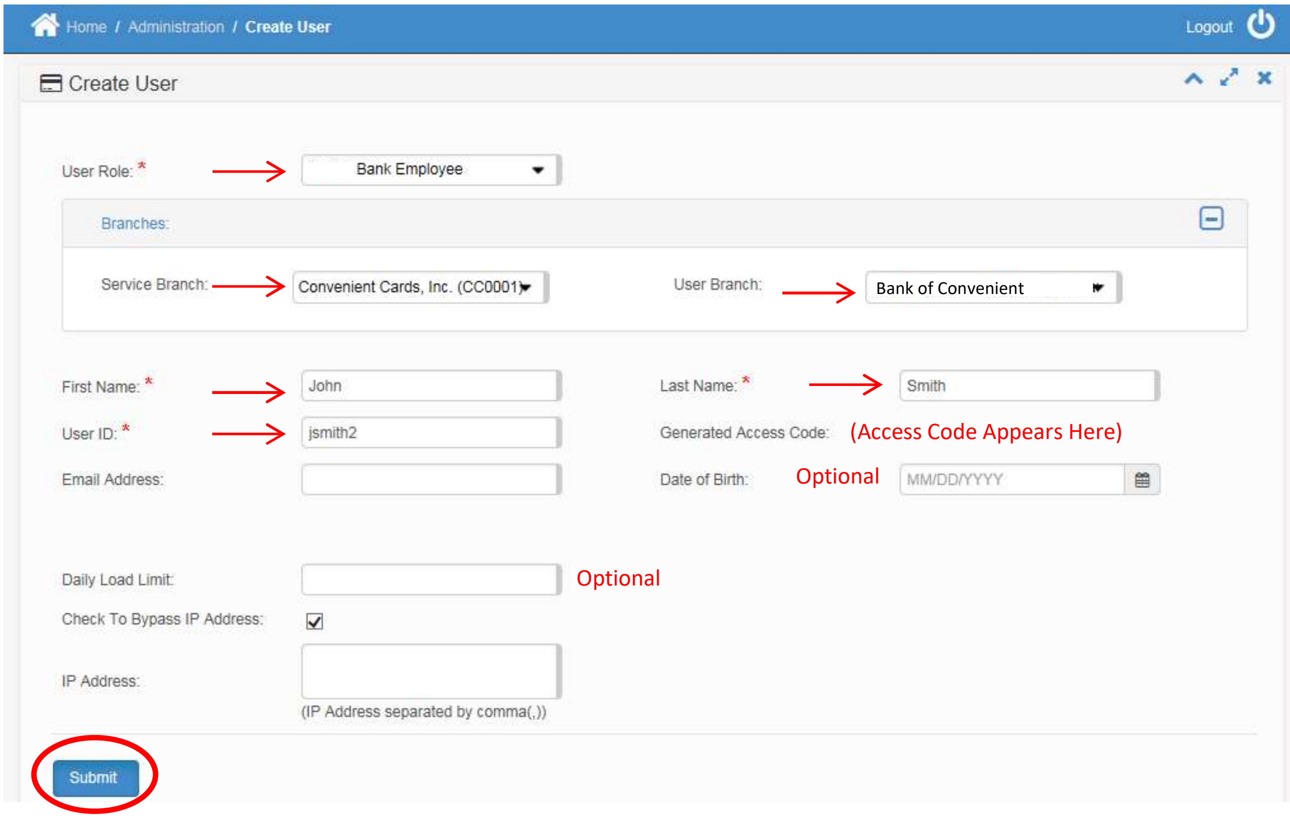


Let us check out the “Administration” tab for a Bank Admin Role user. Click the “Administration” tab on the sidebar on the left of the page or the “Administration” button in the middle of the “HOME” page.



If you are a Bank Admin, you will have two more options in the Administration tab. “Create User” and “User Management” will be available for you. Click “Create User” to add a new user.

Bank Admin Role



First, select the "User Role" in the dropdown. As a Bank Admin role, you will be able to create new Bank Employees and other Bank Admins. The "Service Branch" drop down ***MUST*** be set to "Convenient Cards Inc (CC0001)". The "User Branch" dropdown ***MUST*** be set to your bank name. ***Do NOT*** assign a user to an individual branch. Your users will need to be assigned to your bank name in order to perform transactions in CC Studio. Users assigned to a branch will not function correctly in CC Studio. Enter in the new user's "First Name, Last Name" and create a unique "User ID" and enter in their e-mail. We suggest using their bank e-mail for their user ID as well.

The remaining fields are optional. You may set a user to a "Daily Load Limit" or restrict login and system access to a specific "IP Address". The "Daily Load Limit" will restrict that user's total card loads per day to a specific dollar amount entered in this field. The "IP Address" restricts the user's system access to the IP address entered. If you do not want to lock a user down to one machine/IP address, check off the "Check To Bypass IP Address" and the restriction will be ignored allowing that user to access CC Studio from any IP address/computer.

Once you press "Submit", the user is created and their temporary access code displays in the "Generated Access Code" Field.