



CardSmith Administrative Interface Manual

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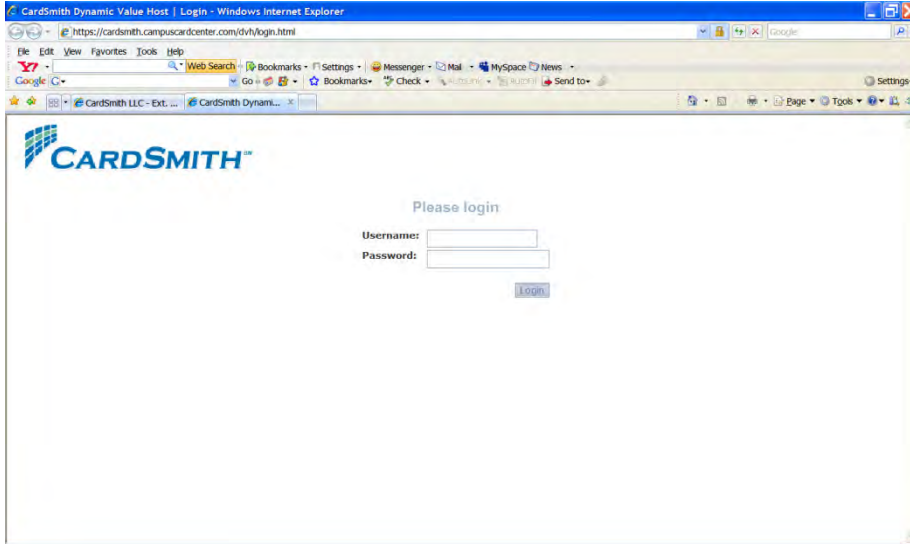
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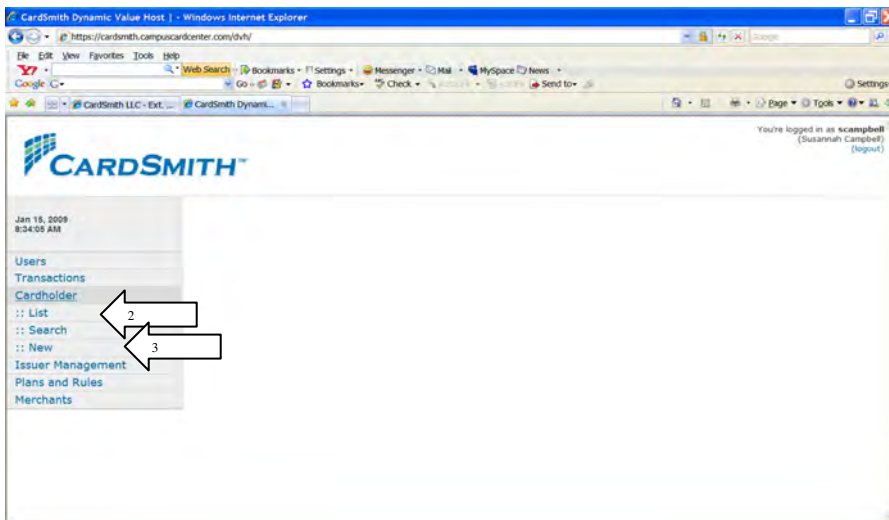
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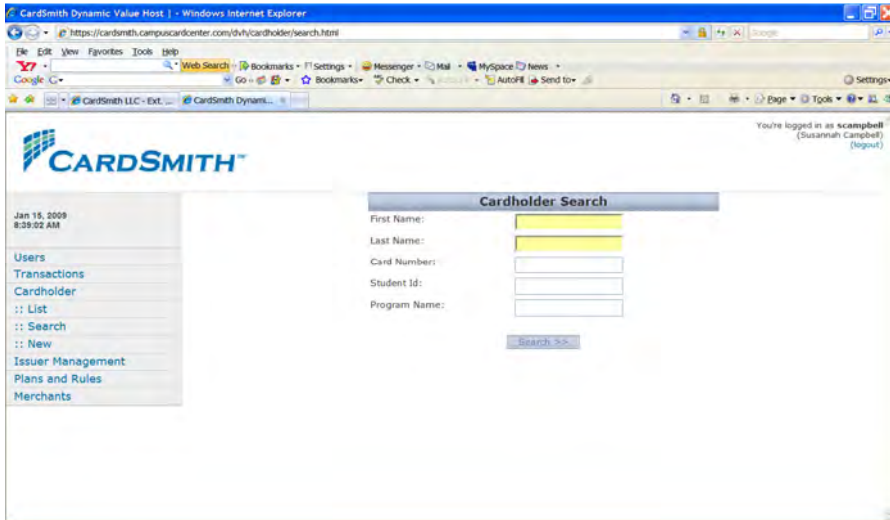
How to Query a Cardholder Record via the Administrative Interface



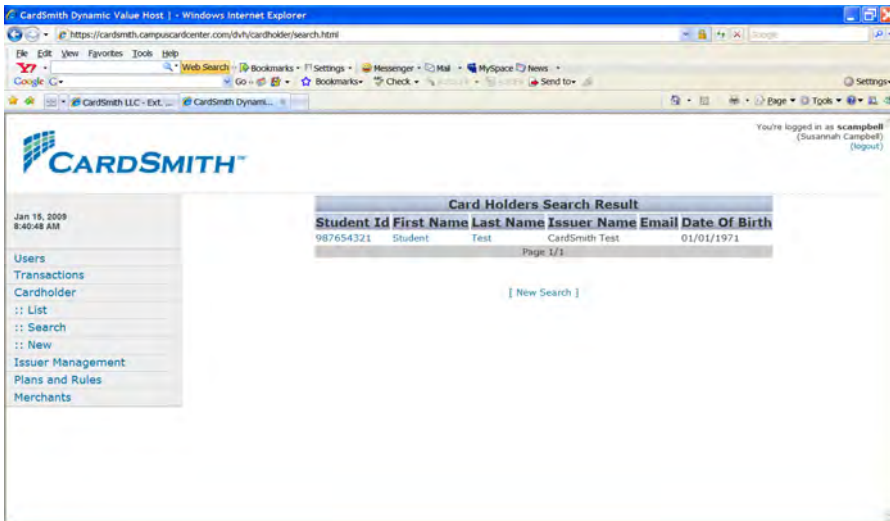
- 1. Log into the host at www.card-smith.com/dvh using your unique username and password.**



- 2. Click 'Cardholder' on the left navigation bar (LNB)**
- 3. Click 'Search' on the LNB**



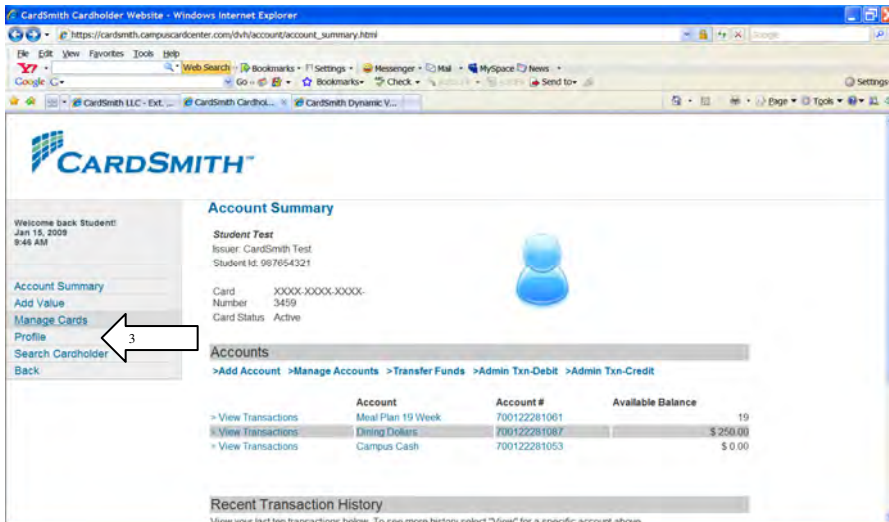
4. Enter at least one search-criteria and Click 'Search'



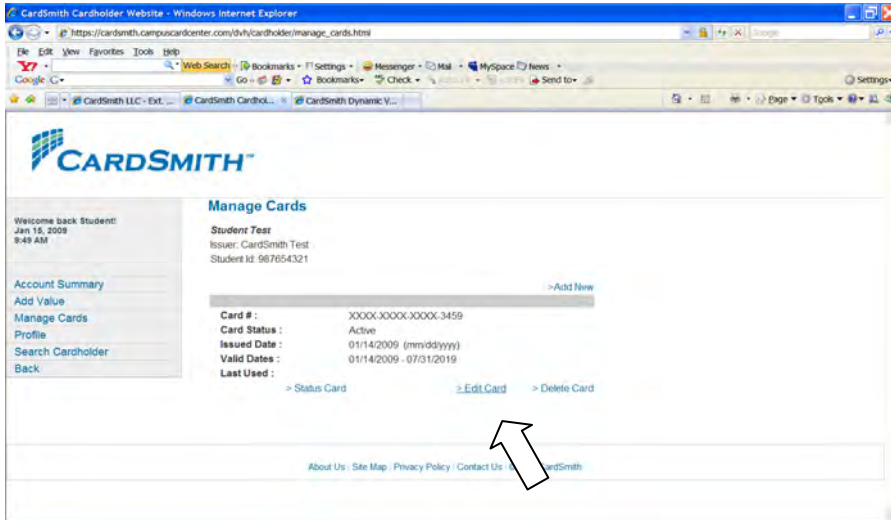
5. Click on the desired cardholder record from the Cardholder Search Result list.

How to View the Full Card Number Assigned To A Cardholder

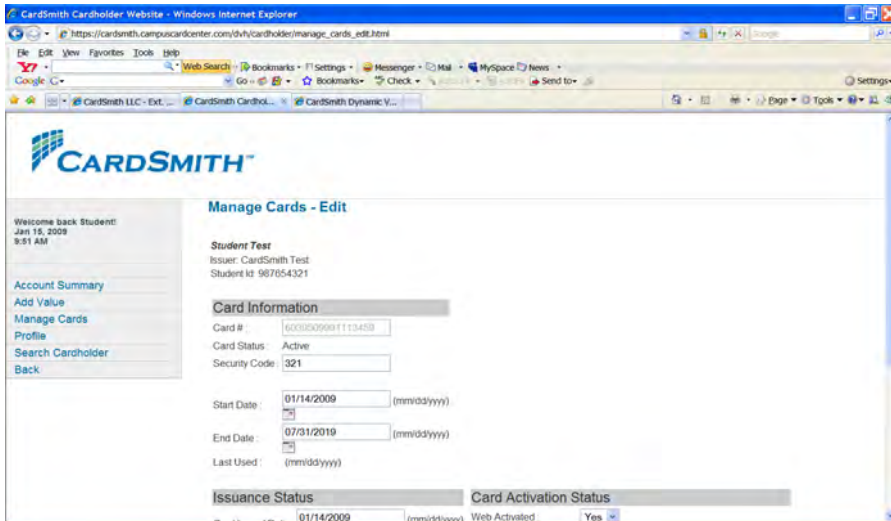
1. Log into the host at www.card-smith.com/dvh using your unique username and password.
2. Query the cardholder (see *How to Query a Cardholder Record via the Administrative Interface*)



3. Click 'Manage Cards'



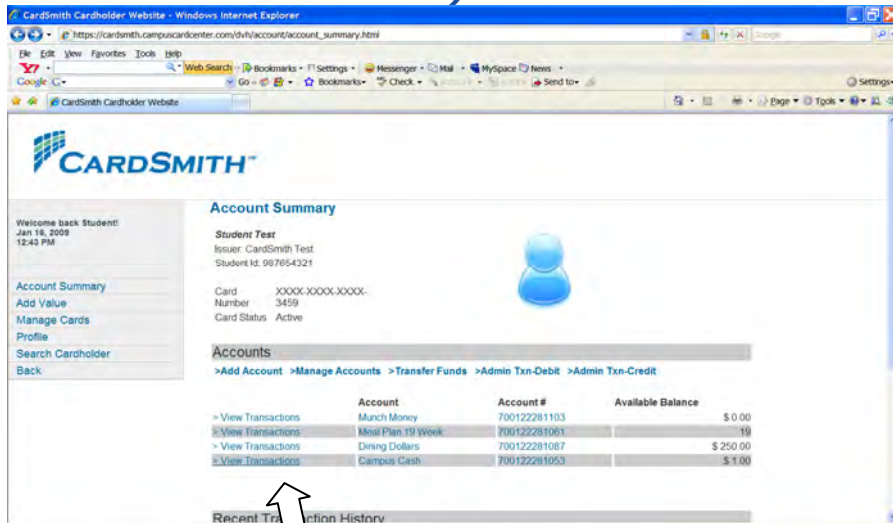
4. Click 'Edit Card'



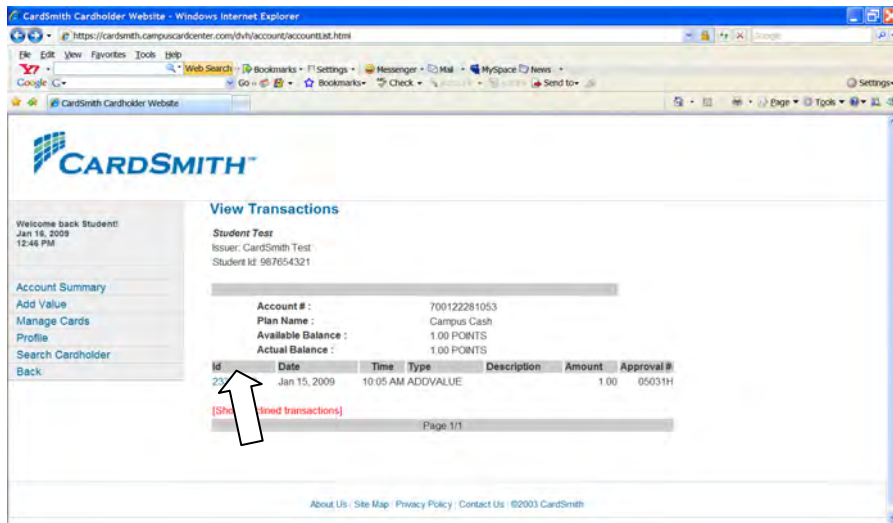
5. Full Card Number & Security Code are displayed

How to View Transactions

1. Log into the host at www.card-smith.com/dvh using your unique username and password.
2. Query the cardholder (see *How to Query a Cardholder Record via the Administrative Interface*)



3. Click View Transactions



4. Click on the Transaction Id to get detail

CardSmith Dynamic Value Host | Windows Internet Explorer

https://cardsmith.compusercenter.com/dv/txn/show.html?d=23355100&cl_vl_txn=391123

Web Search | Bookmarks | Settings | Messenger | Mail | MySpace | News

Google

CardSmith Dynamic Value Host

You're logged in as **scampbell** (Susannah Campbell) (logout)

CARDSMITH

Jan 16, 2009 11:48:30 AM

Users

Transactions

- :: List by Issuer
- :: Debit
- :: Credit
- :: Transfer
- :: Audit Report

Cardholder

- :: List
- :: Search
- :: New

Issuer Management

Plans and Rules

Merchants

Transaction Details

Program 1 CardSmith Test

EL 23355100

Date 1/15/09 10:05:58 AM

Type ADDVALUE

Detail Admn

User scampbell

RetCode 03 Settled

Approval Code 09031H

Points 1.00

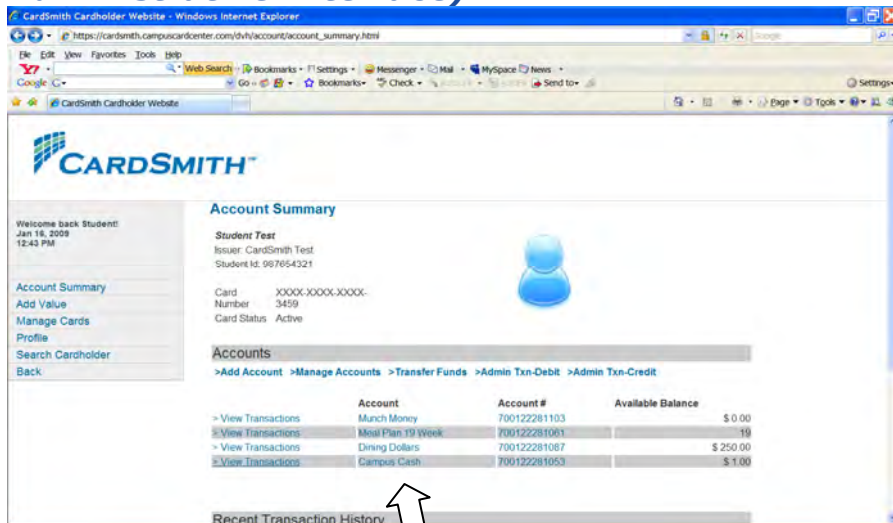
Plan	Account	Type	Debit	Credit	Add.Amnt	OTB	Avail Bal
Campus Cash	709122281053	Points		1.00		N/A	N/A

< Go Back to Account Summary

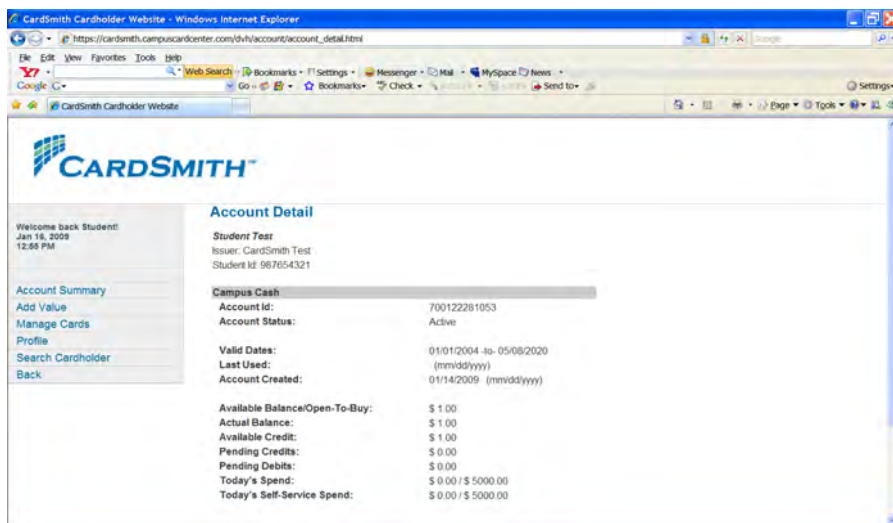
5. Detail will display, click *Go back to Account Summary* when finished reviewing.

How to View Account Details

1. Log into the host at www.card-smith.com/dvh using your unique username and password.
2. Query the cardholder (see *How to Query a Cardholder Record via the Administrative Interface*)



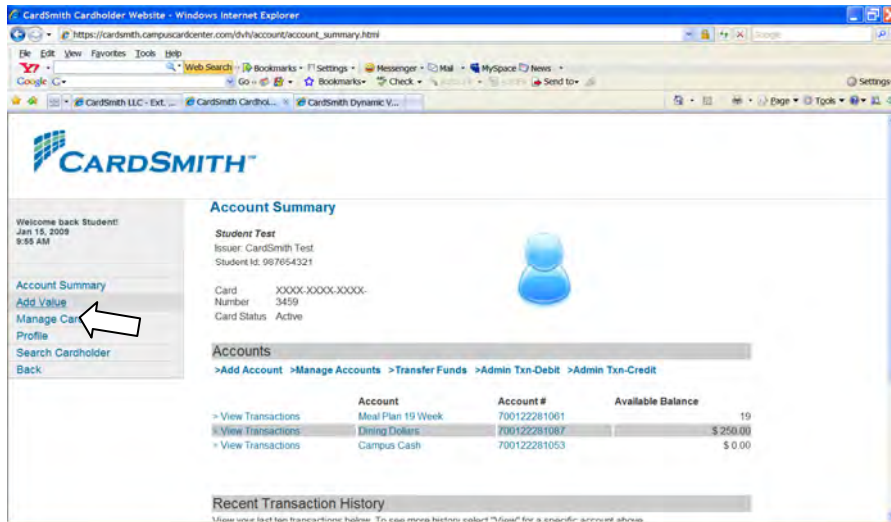
3. Click Account you wish to see detail on



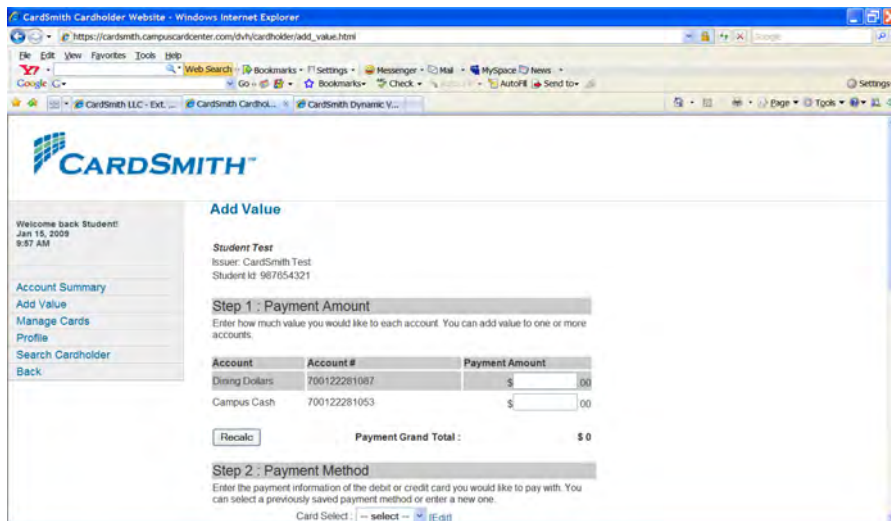
4. Detail will display, click Go back when finished reviewing.

How to Post a Credit Card Payment

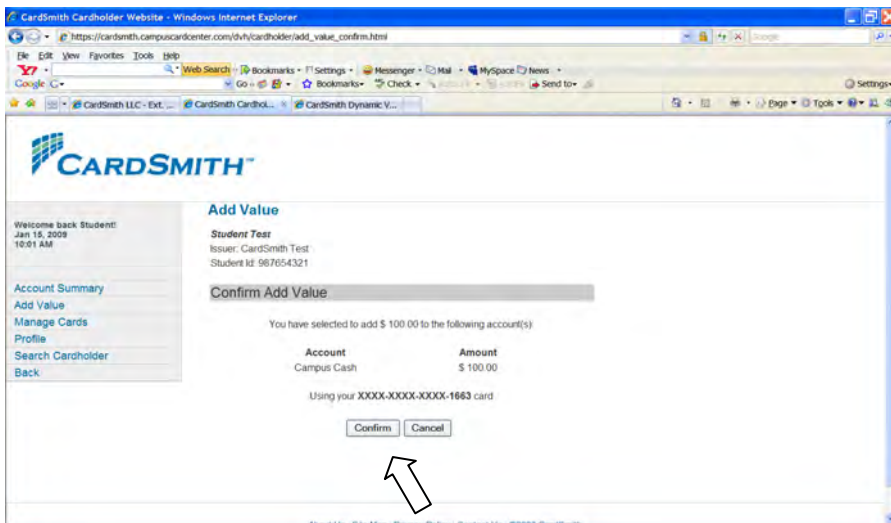
- 1. Log into the host at www.card-smith.com/dvh using your unique username and password.**
- 2. Query the cardholder (see [How to Query a Cardholder Record via the Administrative Interface](#))**



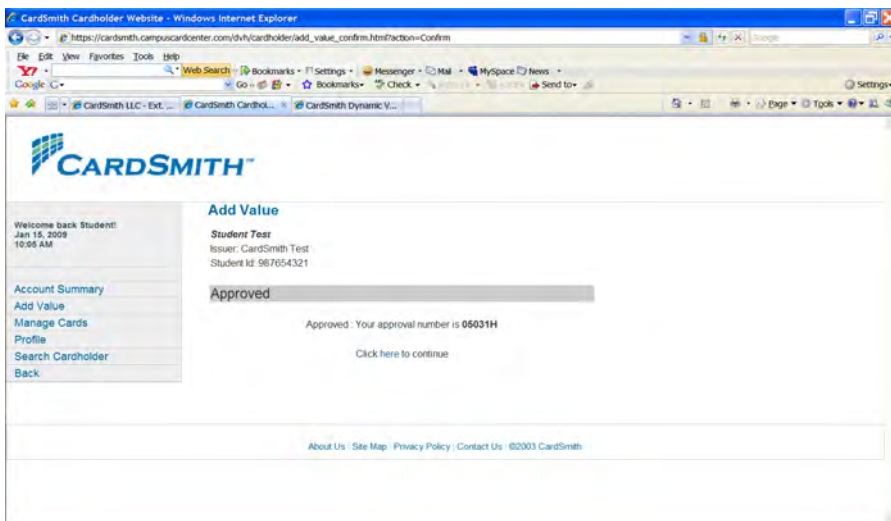
- 3. Click 'Add Value'**



- 4. Enter the dollar amount in the Cash account entry field (must be whole dollars)**
- 5. Scroll down and Complete the Payment Method form (do not select "Save Payment Method")**
- 6. Scroll down and Click 'Submit' at bottom**



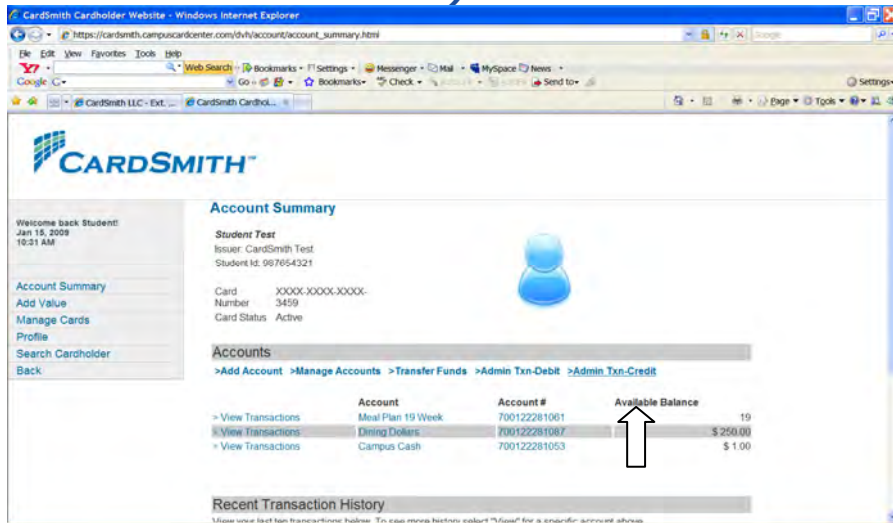
7. Review amount and Click 'Confirm'



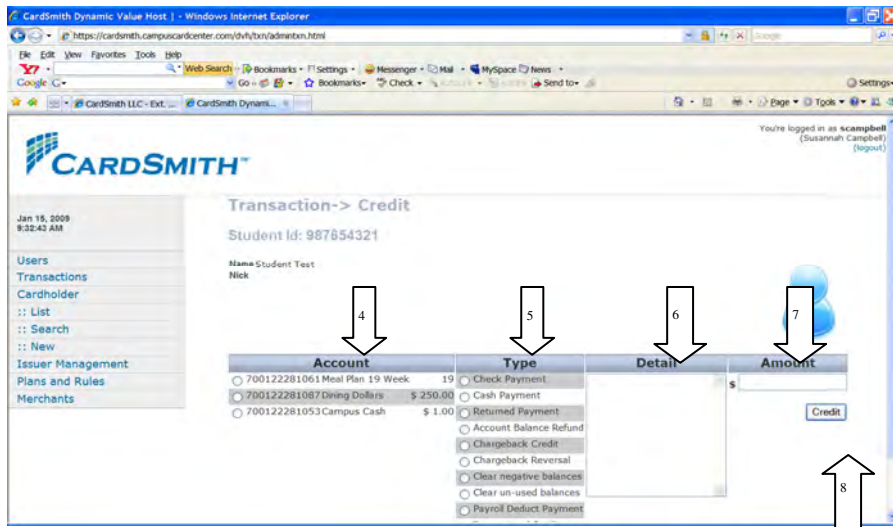
8. Approval Number will display confirming transaction is complete

How to Post a Check or Cash Payment One at a Time

1. Log into the host at www.card-smith.com/dvh using your unique username and password.
2. Query the cardholder (see *How to Query a Cardholder Record via the Administrative Interface*)



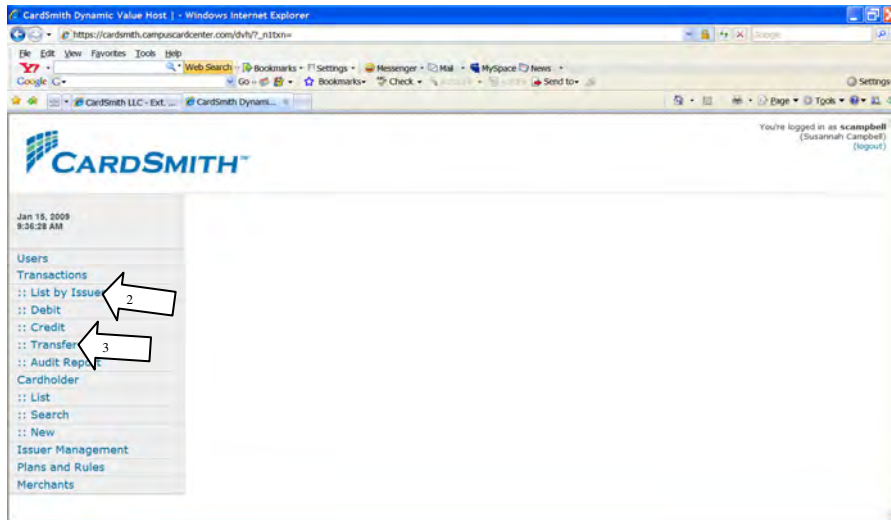
3. Click 'Admin Txn-Credit' under the 'Accounts' gray bar



4. Select the Cash Account
5. Select 'Check Payment' or 'Cash Payment' under Type
6. (Optional) enter the check number in Detail
7. Enter the dollar amount
8. Click 'Credit'

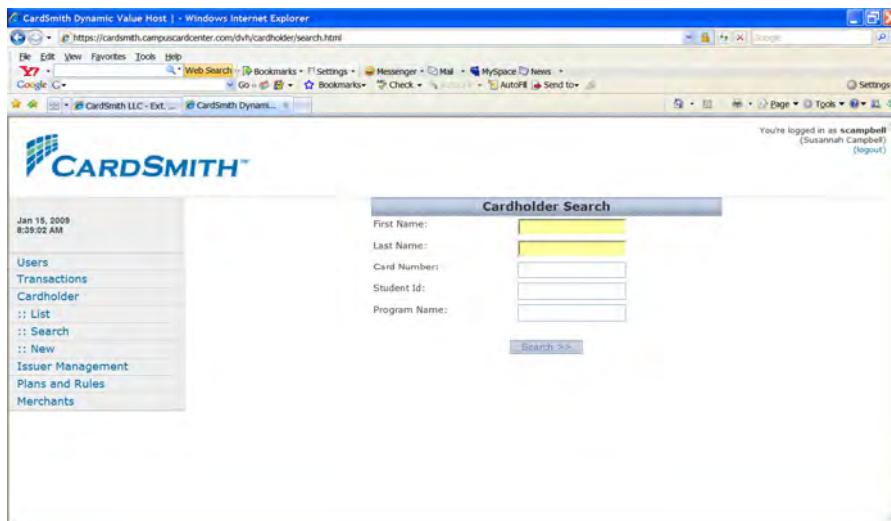
How to Post a Batch of Check Payments

1. Log into the host at www.card-smith.com/dvh using your unique username and password.

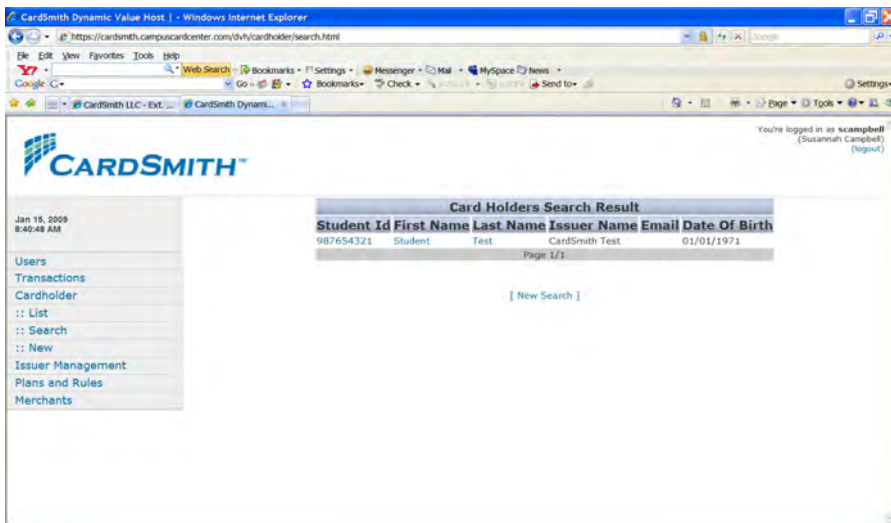


2. Click 'Transactions' on the LNB

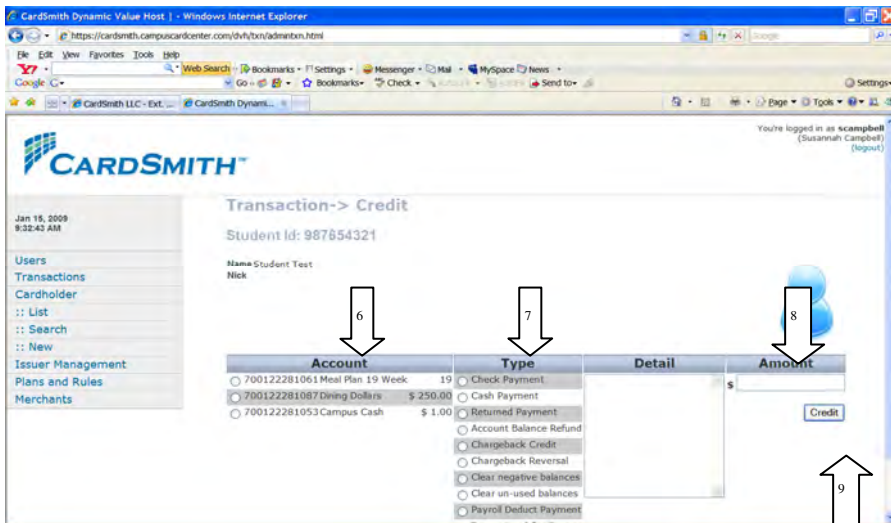
3. Click 'Credit' on the LNB



4. Enter at least one search-criteria and Click 'Search'



5. Click on the desired cardholder record from the Cardholder Search Result list.



6. Select the Cash Account

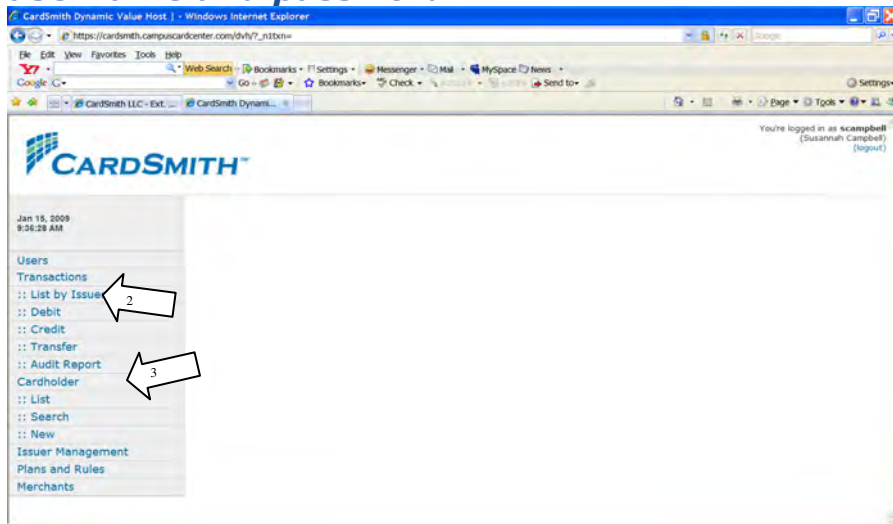
7. Select 'Check Payment' under Type

8. Enter the dollar amount

9. Click 'Credit'

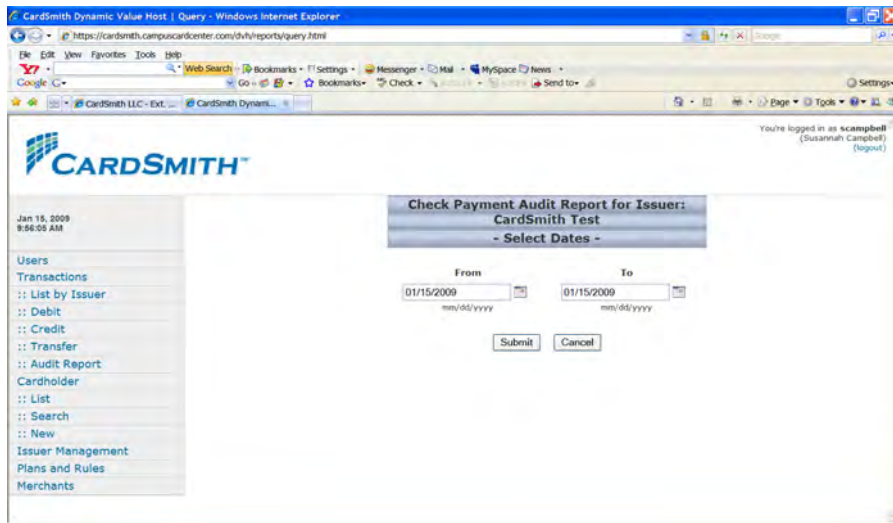
How to Run the Check Audit Report

1. Log into the host at www.card-smith.com/dvh using your unique username and password.



2. Click 'Transactions' on the LNB

3. Click 'Audit Report' on the LNB

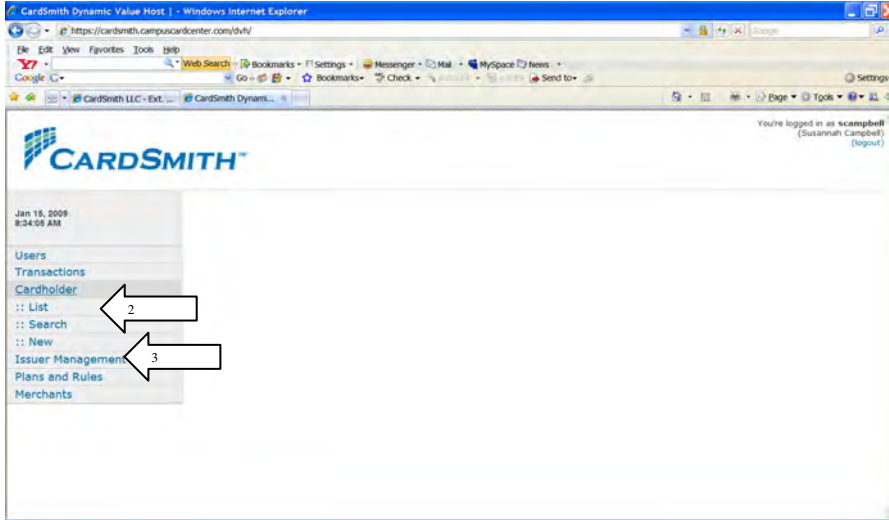


4. Enter the 'From' and 'To' Dates

5. Click 'Submit'

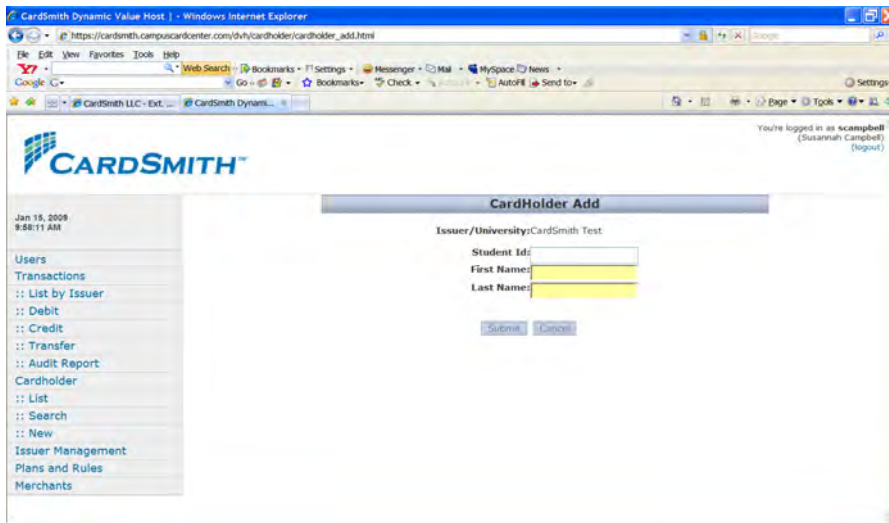
How to Add a New Cardholder Record in the Host

- 1. Log into the host at www.card-smith.com/dvh using your unique username and password.**



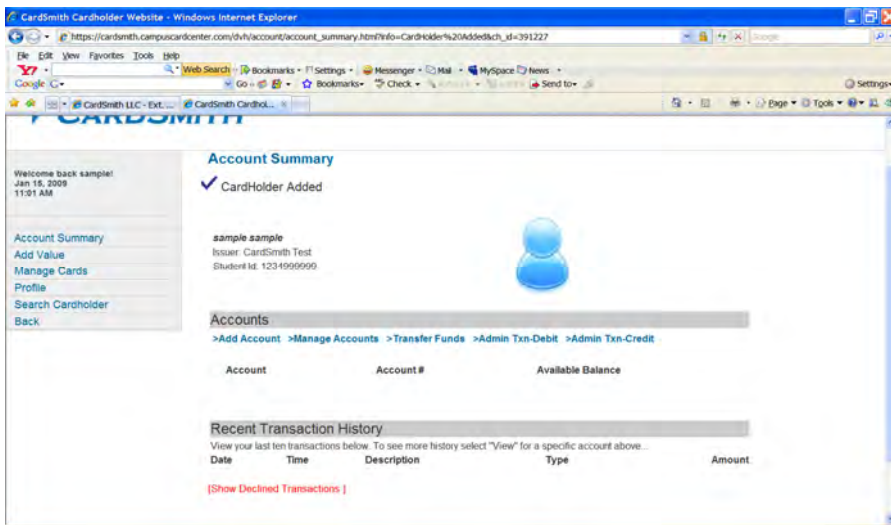
- 2. Click 'Cardholder' on the left navigation bar (LNB)**

- 3. Click 'New' on the LNB**



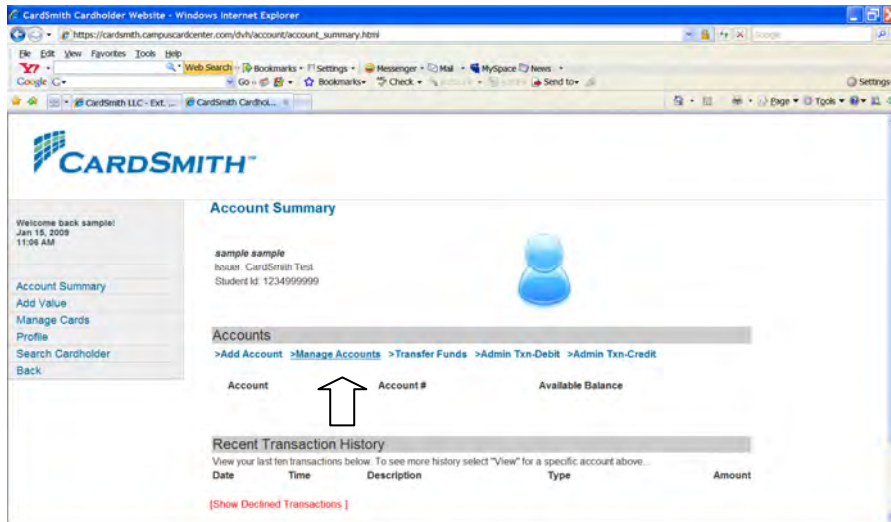
- 4. Input:**
Student ID = ID
First Name = as it appears on the card
Last Name = as it appears on the card

- 5. Click Submit**

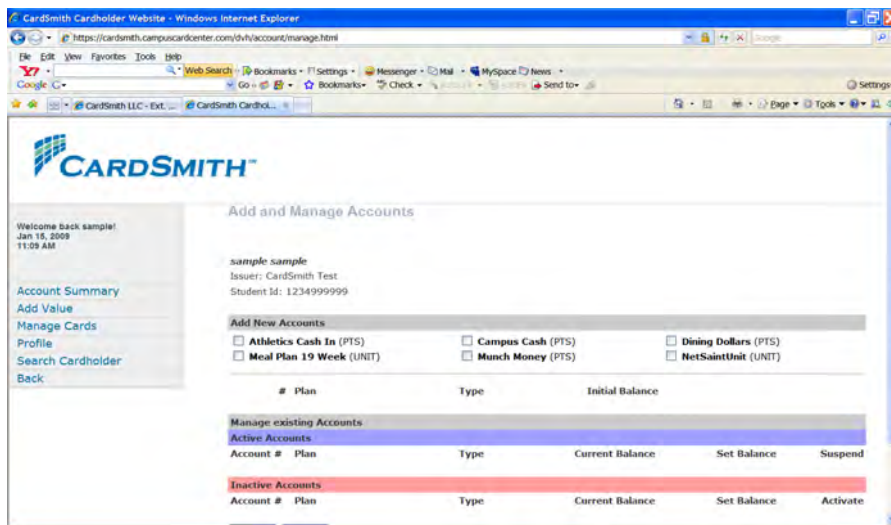


6. Cardholder will be added and you'll be at the Account Summary screen.

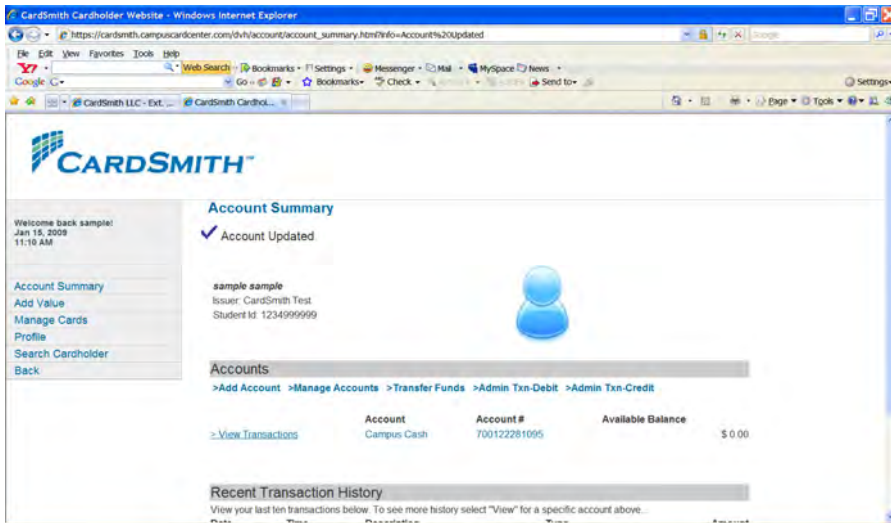
Assign Account(s)



7. From The 'Accounts Summary' page click 'Manage Accounts' (in blue text under the gray bar titled Accounts)

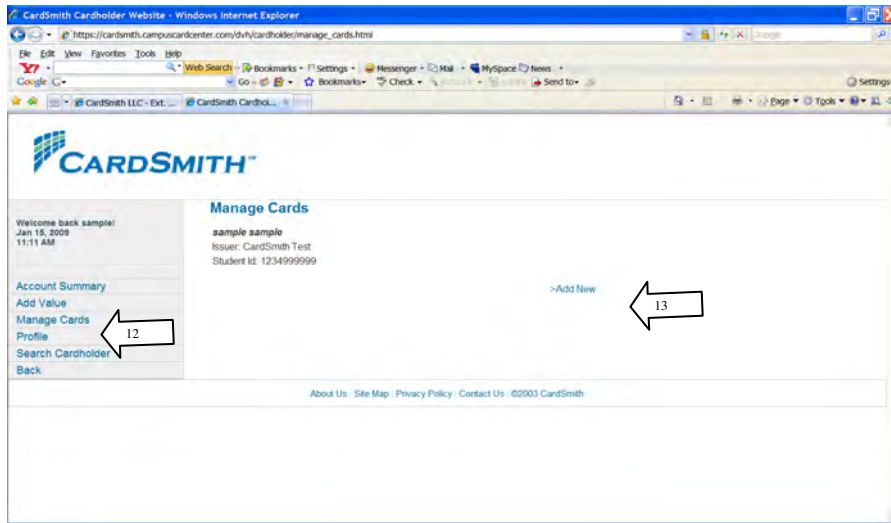


8. In the 'Add New Accounts' section click the radio-button to the left of the Account Name(s) to be assigned
9. Initial Balance Value Is Pre-Configured and Set to \$0.00
10. Scroll to Bottom Of Page and Click 'Update'



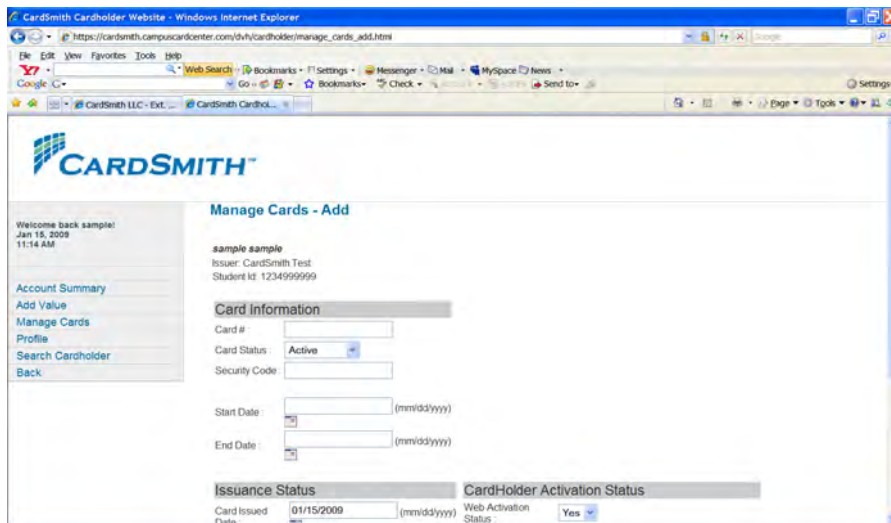
11. You will be returned to the account summary screen and receive the message account updated.

Add Card Number



12. From the 'Accounts Summary' page click 'Manage Cards' on the LNB

13. Click 'Add New'



14. Enter the new Card Number in the 'Card #' field. (all 16 digits no spaces)

15. Enter the new Security Code in the 'Security Code' field. (3 digits)

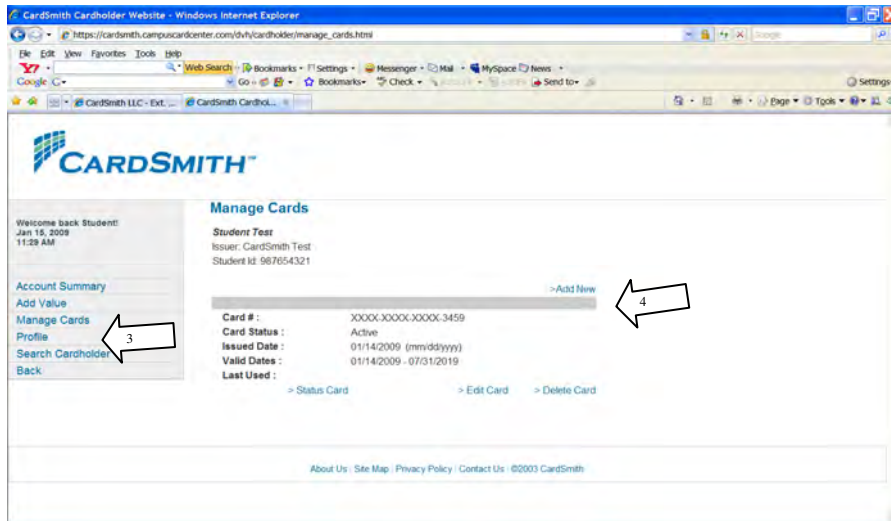
16. Set the Start Date to current date

17. Set the End Date to 12/31/2025

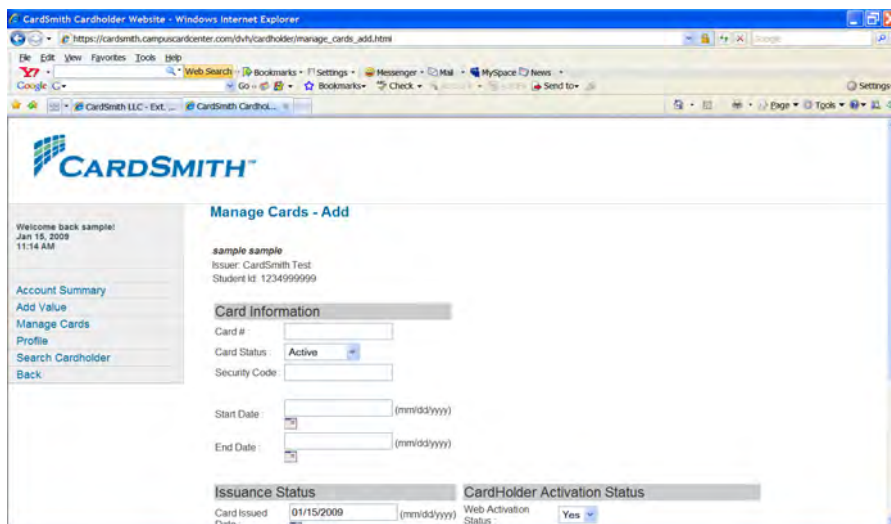
18. Click 'Submit'

How to Add a New Card Number to a Cardholder in the Host

- 1. Log into the host at www.card-smith.com/dvh using your unique username and password.**
- 2. Query the cardholder (see [How to Query a Cardholder Record via the Administrative Interface](#))**



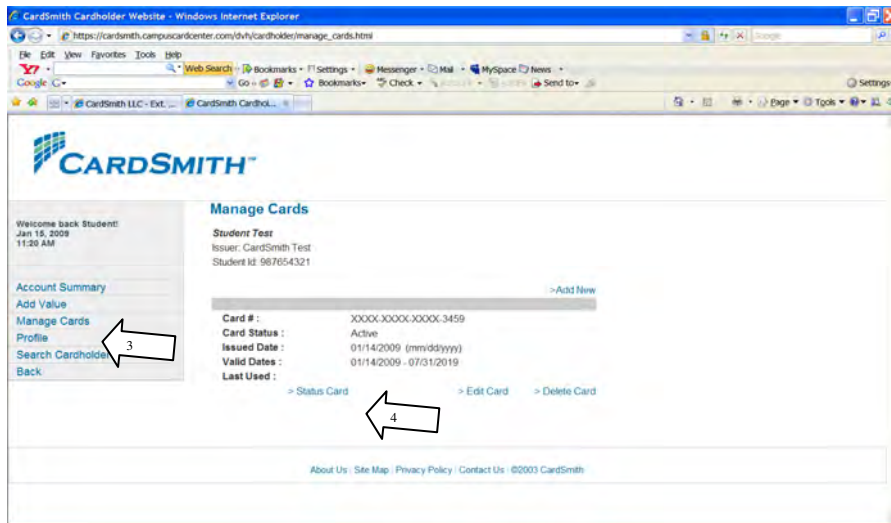
- 3. From the 'Accounts Summary' page click 'Manage Cards' on the LNB**
- 4. Click 'Add New'**



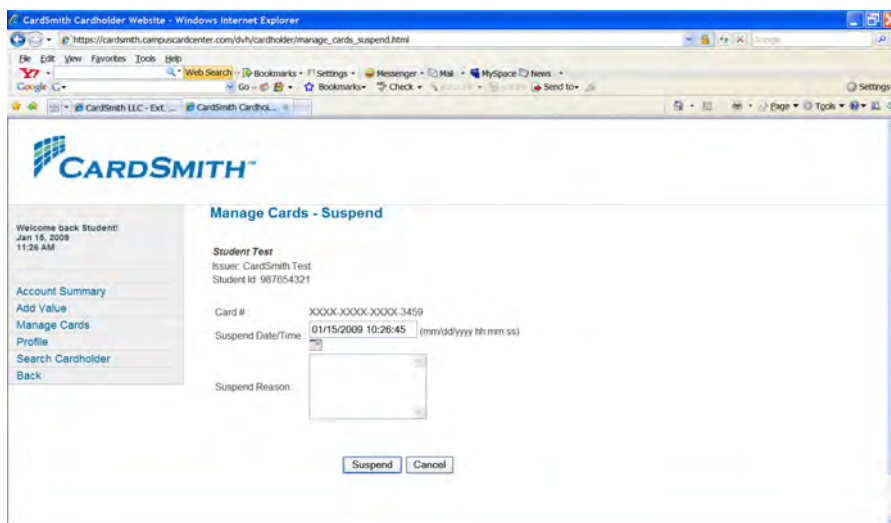
- 5. Enter the new Card Number in the 'Card #' field. (all 16 digits no spaces)**
- 6. Enter the new Security Code in the 'Security Code' field. (3 digits)**
- 7. Set the Start Date to current date**
- 8. Set the End Date to 12/31/2025**
- 9. Click 'Submit'**

How to Suspend a Card Number Assigned To A Cardholder

- 1. Log into the host at www.card-smith.com/dvh using your unique username and password.**
- 2. Query the cardholder (see [How to Query a Cardholder Record via the Administrative Interface](#))**



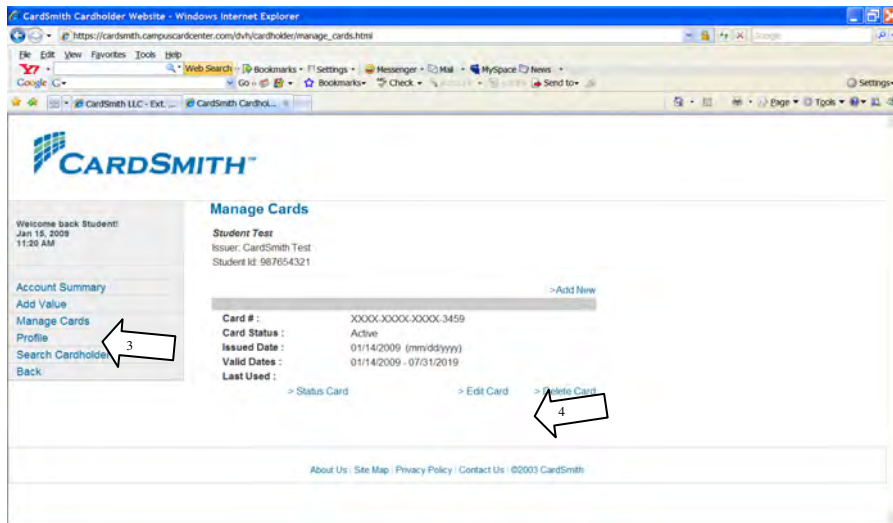
- 3. Click 'Manage Cards' on the LNB**
- 4. Click 'Status Card' for the card number you'd like to suspend**



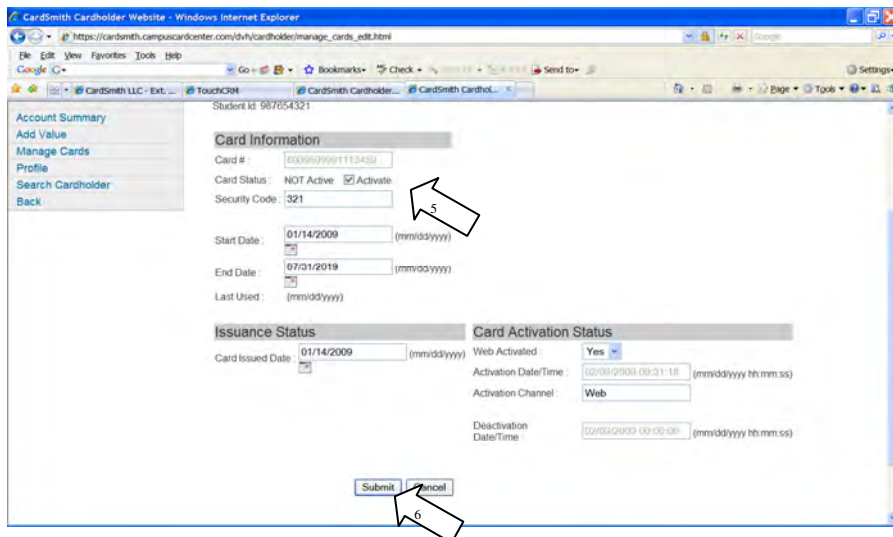
- 5. Enter Suspend Reason (e.g Lost Card, etc)**
- 6. Click 'Suspend'**

How to Reactivate a Suspended Card

1. Log into the host at www.card-smith.com/dvh using your unique username and password.
2. Query the cardholder (see [How to Query a Cardholder Record via the Administrative Interface](#))



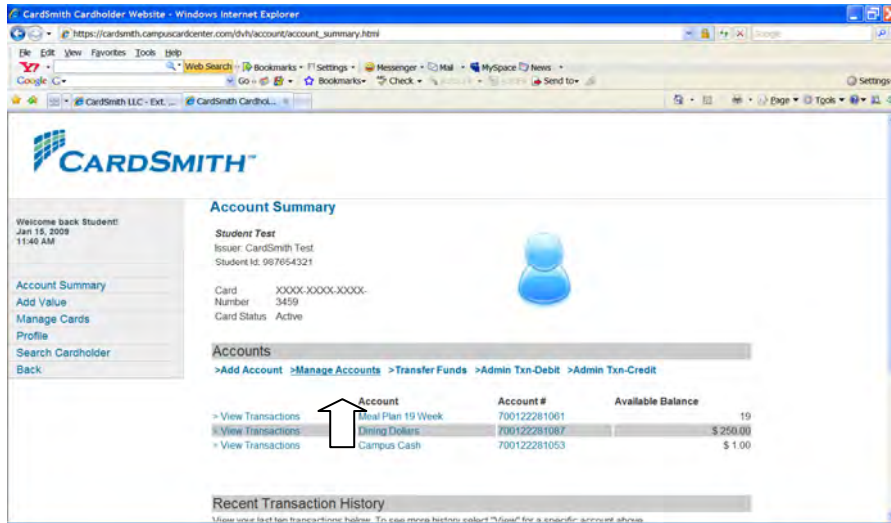
3. Click 'Manage Cards' on the LNB
4. Click 'Edit Card' for the card number you'd like to reactivate



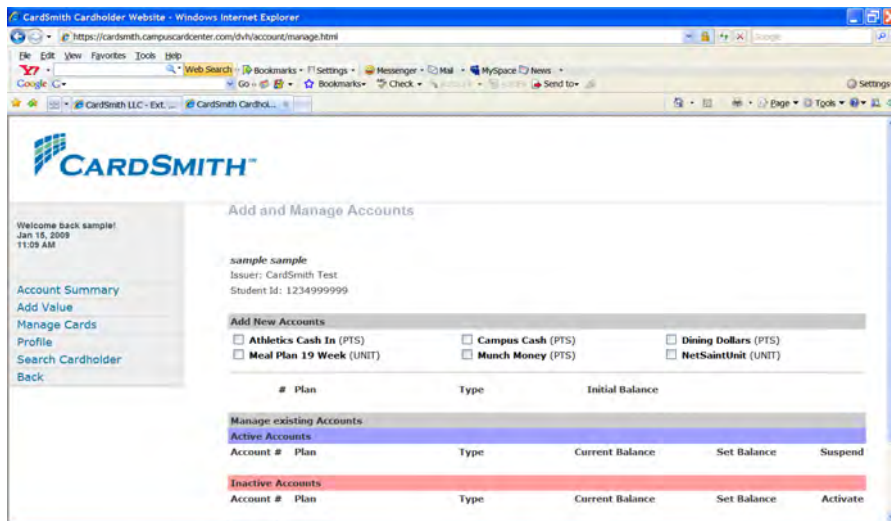
5. Click the 'Activate' box
6. Click 'Submit'

How to Manually Assign a Meal Plan

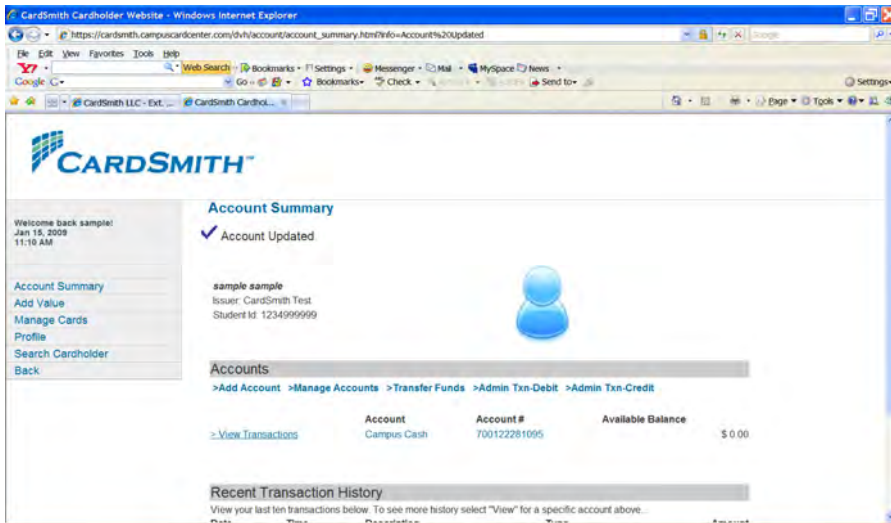
1. Log into the host at www.card-smith.com/dvh using your unique username and password.
2. Query the cardholder (see [How to Query a Cardholder Record via the Administrative Interface](#))



3. From the 'Accounts Summary' Page Click 'Manage Accounts'



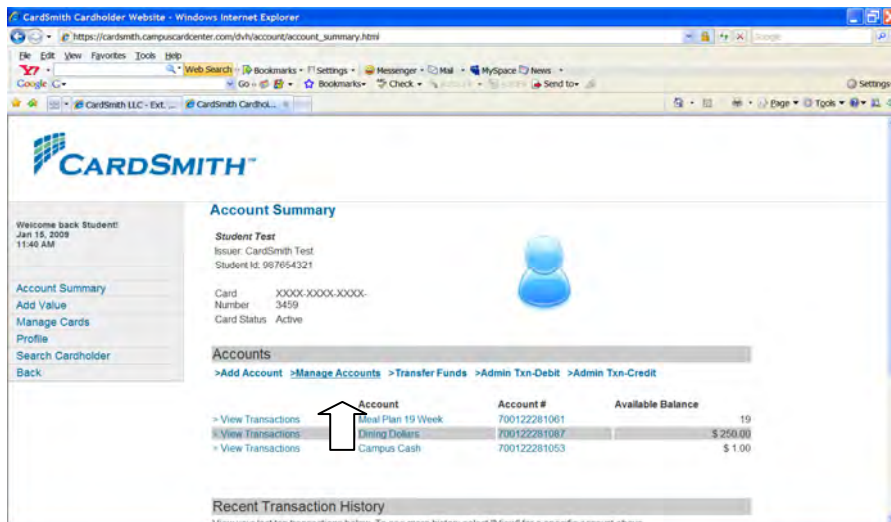
4. In the 'Add New Accounts' section click the radio-button to the left of the Account Name(s) to be assigned
5. Initial Balance Is Pre-Configured
6. Scroll to bottom of page and click 'Update'



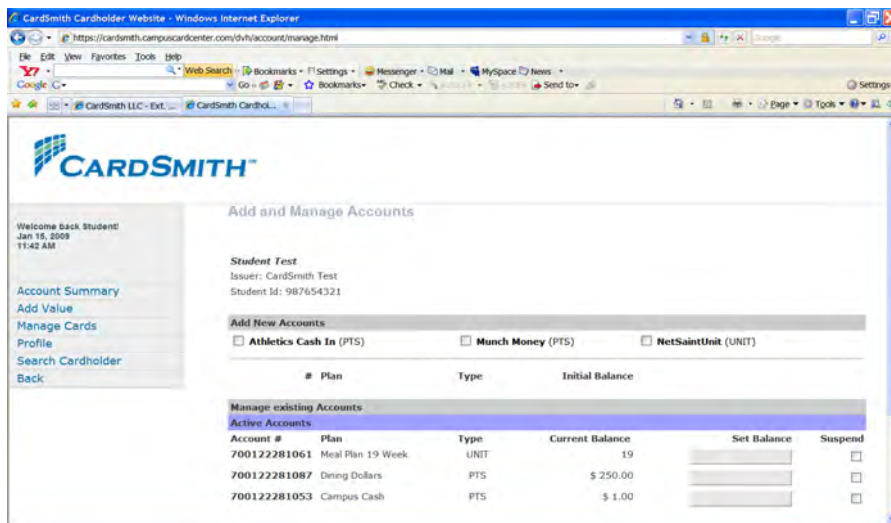
7. You will be returned to the Account Summary Screen and receive the message Account Updated.

Changing a Meal Plan Election

1. Log into the host at www.card-smith.com/dvh using your unique username and password.
2. Query the cardholder (see [How to Query a Cardholder Record via the Administrative Interface](#))



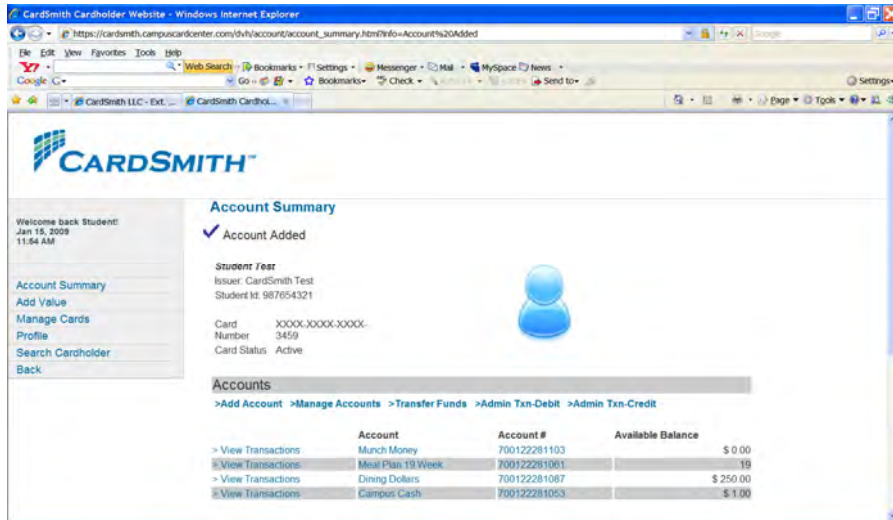
3. From the 'Accounts Summary' page click 'Manage Accounts'



4. In the 'Add New Accounts' Section and click the radio-button to the left of the New Account Name(s) to be assigned *Note: If you prorate balances based on the timing of the Meal Plan Change, update the Initial Balance Amount

5. In the Manage Existing Accounts/Active Accounts Section for the old Meal Plan Accounts to be removed, click the suspend radio-button to the far right of the Account Name then enter 0 in the set balance field for the old Meal Plan Accounts *Double check your work to avoid canceling a Cardholder's Cash Account

6. Scroll to bottom of page and click 'Update'



7. You will be returned to the Account Summary Screen and receive the message Account Updated.