SWIFT PREPAID CARD MANUAL

Quick Reference Guide

Card Activation, Card Balance Inquiry, System Support and FAQs
1. Once the user logs in they will be presented with the landing page and three options:
   - Manage Orders
   - Activate Cards
   - View History
2. Select Manage Orders (1)

3. Once on the Manage Orders module, the user will have 3 options:
   - Help & Support (1)
   - F.A.Q’s (2)
   - Activate Cards (3)
Card Activation and Funding

1. To Activate cards, the user can select either Activate Cards via the Main Menu table (1) or via the Activate Cards icon (2)

2. The User will be presented with a drop down offering two options, please select Single as we are not using the Bulk functionality.

3. Below is a sample card activation completed template:
   - Required fields are indicated by an *
4. Free Form Fields
   - **Social Security Number**: It is extremely important that the SSN is entered correctly as this impacts many backend reports and will be verified with the IRS (and will subsequently impact future payments to the payee).
   - **Funding Source**: It is extremely important that the speed type/program is entered correctly
     - If you are unsure of your Funding Source, please check with your Unit Business Manager/LFO.

5. If the payee is an employee and the payment is not study related, the user **MUST** enter an Employee ID Number.

6. Successful activation will generate the following message:

   ![Activation Confirmation](image)

   **Card Balance Inquiry**
   1. A user can quickly look up the current value on a card by clicking on Activate Cards (on the landing page).

   ![Activate Cards](image)

   2. The user will then select Single as the Funding type and be presented with the Activation module.
3. The user will then enter the 16-digit card number and select **GET BALANCE**.

![GET BALANCE](image)

4. The user will receive the prompt below. Simply select **SHOW BALANCE** to display the current value on the card.

![SHOW BALANCE](image)

**View History**

1. From the Landing Page, the user can navigate to the View History module by clicking View History

![View History](image)

2. After selecting **View History**, the user will have three ways to filter for results:
   - Location ID – This will be limited to the location you are assigned to
   - Filter Criteria (Date, Transaction Type, User)
     - Date: The date of the transaction
     - Transaction Type: Provides additional filtering options
       1. Individual Card Activations
       2. Individual Card Funding
       3. Returned Card Credit
       4. Bulk Order Placed
       5. Bulk Order Shipment Confirmed
     - User: The user that initiated the transaction
3. Results will be displayed similar to the screen shot below:
   - The user can click on the headers to sort each column

   ![View History](image)

   **Search Card Funding Transactions**

   1. From the View History Module, the user may also select the Search Card Funding Transactions to view more details on a specific card(s)

   ![Search Card Funding Transactions](image)

   2. The User can filter by any of the following options:
      - Funding Source
      - First Name
      - Last Name
      - Employee ID
      - Program – UoL *(will always be UoL)*
      - Location
      - Study
      - Funded
      - Transaction Initiated By
      - Card Number
3. If no filter criteria is entered, the system will default to activity for the current day.

4. Search Results will be displayed similar to the screen below:
   - Results can be exported to Microsoft Excel and Microsoft Word.

5. The user can “Restore Card”:
   - This removes and de-activates the card and returns it to available inventory.
   - This should be used if a card is funded in error.

Help & Support
1. From the Manage Orders page, click on Help & Support.
2. The Help & Support module will require the user to enter the information below and a request will be submitted to Swift for resolution. It is usually a good idea to contact your Program Administrator before submitting an issue to Swift, as they may already be aware of issue and the resolution.
FAQs

1. The FAQs module will walk the user through these 10 common technical issues. If you are still experiencing application issues, please submit a ticket through the Help and Support module documented above.