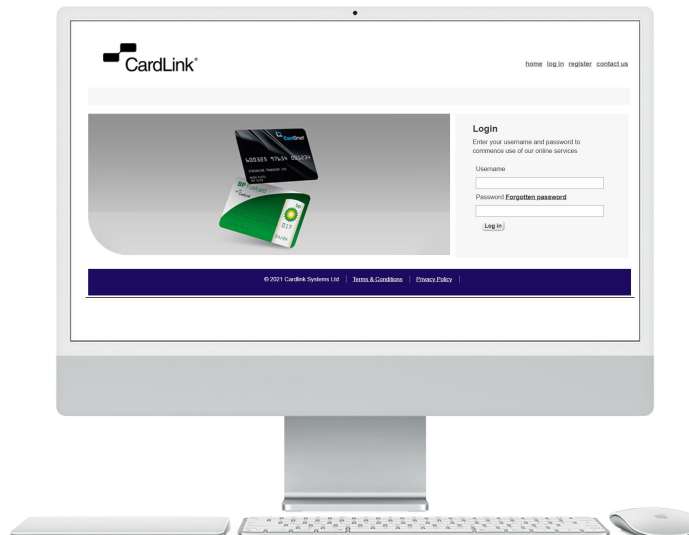


User Guide CardLink Online



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1 Getting Started

1.1 Introduction to CardLink Online

CardLink Online is a 24 hour, 7 day a week tool that allows CardLink account holders to manage their accounts and cards online. CardLink Online can be used to administer your account and card details, order new cards and report on overall account activity.

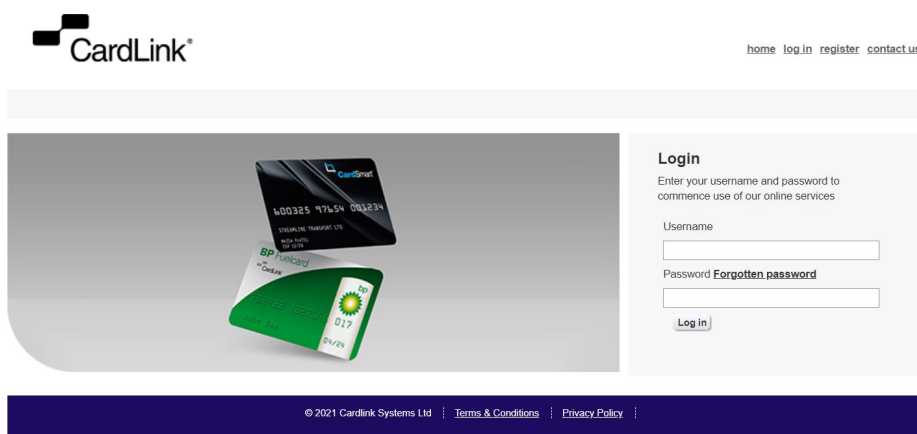
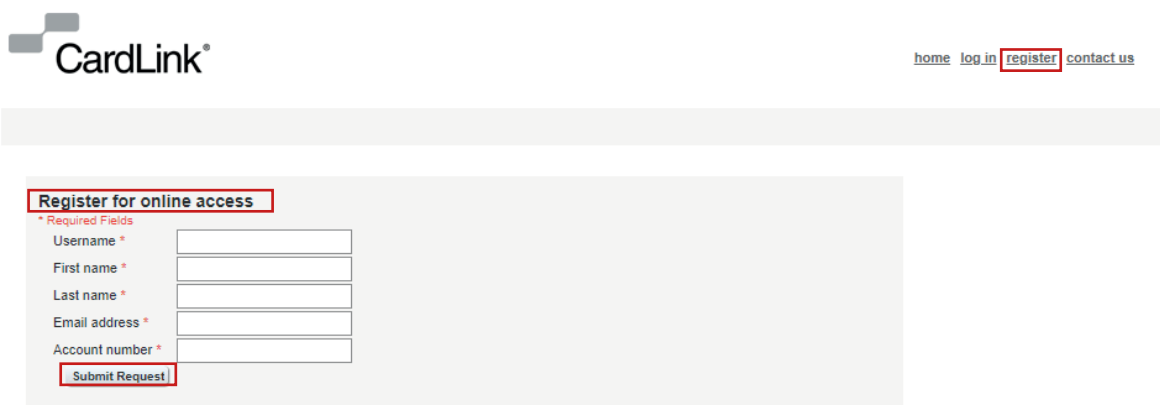
1.2 Logging On to CardLink Online for the first time

Go to <https://clo.cardlink.co.nz/>

You need to register first. Please select register and fill the required fields. Once you have been verified as an authorised contact for the account, you will then receive an email with your temporary password.

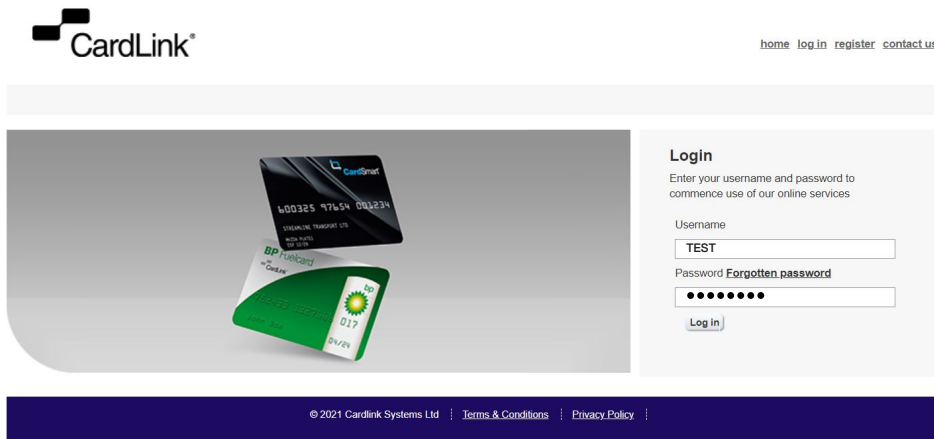
Please use Google Chrome to access CardLink Online.

Enter your user name and temporary password under Login. You will then be prompted to activate your account and change your password to a password of your choice.



If you have any questions please call our customer service team 0800 663 866 or email us on customer@cardsmart.co.nz

1.3 Login to: <https://clo.cardlink.co.nz/>



Once you have successfully logged in, the below page will be displayed:

2 Card and Account Administration

2.1 Account Page Layout



Manage Account Manage Merchants Manage Users Update My Profile

Search for accounts

Account number
Account name
Trading name
Contact name

Search for cardholder

Card number
Registration

Recent Accounts

Quick Links

- [Request new card](#)
- [Manage card \(products, limits ...\)](#)
- [View an invoice](#)
- [Run a transaction report](#)
- [Update contact details](#)
- [Find merchant](#)

Account -

Summary Contact Details Statements/Invoices Transactions Cost Centres Cards Reports

Account summary

Total due as of 30/04/2021 \$0.00 Overdue amount \$0.00

Credit limit
Today's balance
Available credit




Account status

Credit Card Payment

Amount Payable: \$

I have read and accept the [Card Smart Terms & Conditions](#): Yes

Please select a Payment Card Type

 3.00%  3.00%  3.60%

(By selecting a Card Type, I accept the Credit/Debit Card Fee excl. of GST that will apply)

The default tab is the Account Summary page which contains:

- Amount due for payment
- Overdue amounts (where applicable)
- Current Credit Limit
- Current balance
- Available credit
- Option to pay by credit card

From this page there are tabs so you can:

- Update profile and contact details
- View and Download statements and Invoices
- View and export transactions
- Create and edit cost centres
- View and edit card details
- Run reports

2.2 Update Profile and Account Contact Details

To update your profile or change your password, select Update My Profile and then click on Update details. Update your details and save changes.



[log off](#) [profile](#)

Manage Account

Update My Profile

Search for accounts

Account number

Account name

Trading name

Contact name

Search for cardholder

Card number

Registration

Search results

| Account number | Account name | Account trading name | Contact name | Tag as favourite |
|----------------|--------------|----------------------|--------------|------------------------|
| | | | | Select |
| | | | | Select |
| | | | | Select |

|< < Page 1 of 1 > >| Goto page Rows per page



Manage Account

Update My Profile

Profile

Username

First name

Last name

Email address

User group

Update Profile

Username

First name

Last name

Email address

User group

[Reset password](#)

To amend current contact details, click Contact Details, then select Edit



Manage Account Update My Profile

Search for accounts
Account number
Account name
Trading name
Contact name

Search for cardholder
Card number
Registration

Recent Accounts

Quick Links

- [Request new card](#)
- [Manage card \(products, limits ...\)](#)
- [View an invoice](#)
- [Run a transaction report](#)
- [Update contact details](#)
- [Find merchant](#)

Summary **Contact Details** Statements/Invoices Transactions Cost Centres Cards Reports

Account contact details

Contact

Contact details

Phone number
Mobile
Work number
Alternative number
Fax
Email
Website:

Physical address

Postal address

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Update the account details in the next screen and click 'save changes'

Search for accounts
Account number
Account name
Trading name
Contact name

Search for cardholder
Card number
Registration

Recent Accounts

Quick Links

- [Request new card](#)
- [Manage card \(products, limits ...\)](#)
- [View an invoice](#)
- [Run a transaction report](#)
- [Update contact details](#)
- [Find merchant](#)

Summary **Contact Details** Statements/Invoices Transactions Cost Centres Cards Reports

Edit account contact details

* Required Fields

Contact *

Contact details

At least one contact number is required

Phone number *
Mobile
Fax
Email
Website:

Physical address

Address *
Suburb
Postcode * [Find Postcode](#)

Postal address

Same as physical address

Address *
Suburb
Postcode * [Find Postcode](#)

2.3 View Statements and Invoices

Clicking the Statements/ Invoices tab gives you the choice to view and download your invoices and statements.

Search for accounts

Account number

Account name

Trading name

Contact name

Search for cardholder

Card number

Registration

Recent Accounts

Quick Links

- [Request new card](#)
- [Manage card \(products, limits ...\)](#)
- [View an invoice](#)
- [Run a transaction report](#)
- [Update contact details](#)
- [Find merchant](#)

Account

Summary | Contact Details | **Statements/Invoices** | Transactions | Cost Centres | Cards | Reports

Account statements

Find statements/invoices

Invoice number

Statement date range From To

Statement search results

| Statement Date | Opening Balance | Closing Balance | Statement Amount | Payments | Actions |
|----------------|-----------------|-----------------|------------------|-----------|---|
| 30/04/2021 | \$181.48 | \$38.38 | \$38.38 | -\$181.48 | - Select Action - - Select Action - Download Statement PDF View Transactions |
| 31/03/2021 | \$0.00 | \$181.48 | \$181.48 | \$0.00 | |

|< < Page 1 of 1 >> | Goto page Rows per page

2.4 View Transactions

To view transactions click the 'Transactions Tab' select your search criteria and click search. To view transaction detail click 'details'



Manage Account | Update My Profile

Account - [Redacted]

Summary | Contact Details | Statements/Invoices | **Transactions** | Cost Centres | Cards | Reports

Account transactions

Search, view and download processed transactions

Find transaction

Invoice number: [] Voucher number: []

Card number: []

Transaction date From: [dd/mm/yyyy] To: [dd/mm/yyyy]

Processed date From: [dd/mm/yyyy] To: [dd/mm/yyyy]

Advanced search

[Clear search filters](#) [Search](#)

Transaction search results

[Export](#)

| Docket voucher | Date | Card | Invoice | Merchant Site | Amount | |
|----------------|------------------|------|---------|---------------|---------|-------------------------|
| | 14/05/2021 19:50 | | | | \$70.49 | Details |

|< < Page 1 of 1 > >| Goto page: [] Rows per page: 10

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Docket/Voucher number

Invoice status: Not Invoiced
 Cost centre: 19800
 ODO reading: 19800
 Cardholder type: Personal card holder

| Product | Quantity | Unit Price | Net Amount |
|--------------------|----------|------------|------------|
| Unleaded | 32.23 | \$1.90 | \$61.30 |
| GST total type | | | 9.19 |
| Total gross amount | | | 70.49 |

To see a listing of all transactions relating to a specific invoice, complete the Invoice Number field

To export a transaction listing click 'export' - your transactions will be returned in a CSV file.

Transaction search results

[Export](#)

| Docket voucher | Date | Card | Invoice | Merchant Site | Amount | |
|----------------|------------------|------|---------|---------------|---------|-------------------------|
| | 14/05/2021 19:50 | | | | \$70.49 | Details |

|< < Page 1 of 1 > >| Goto page: [] Rows per page: 10

2.5 Cost Centres

To view, edit and create cost centres click the 'Cost Centre' tab.

Account -

The screenshot shows the 'Cost Centres' tab selected in the account navigation menu. The page title is 'Cost centres'. There is a search bar labeled 'Find cost centre' and a button 'Add new cost centre'. Below the search bar is a dropdown menu for 'Cost centre name' and an input field. An 'Advanced search' section contains a 'Clear search filters' link and a 'Search' button. The 'Cost centre results' section displays a table with the following data:

| Cost centre name | Number | Status | Contact name | | |
|------------------|--------|--------|--------------|------|------|
| Admin | 20 | Issued | Kim Dean | View | Edit |
| Farm | 150025 | Issued | Kim Dean | View | Edit |

At the bottom of the table, there is a pagination control: '|< < Page 1 of 1 >>| Goto page Rows per page 10 ▾'.

Clicking "View" (under cost centre results) will bring up all the current cost centre details.

Click Add New Cost Centre to create a new cost centre as per the image below. After adding the new cost centre, click on Add Cost Centre



The screenshot shows the 'Add Cost centre' form in the CardLink account interface. The page title is 'Account -' and the 'Cost Centres' tab is selected. The form is titled 'Cost centres > Add Cost centre'. It contains the following fields and sections:

- Cost centre number *** (input field)
- Cost centre name *** (input field)
- Contact details**
 - Contact *** (input field)
 - Phone number *** (input field)
 - Mobile** (input field)
 - Alternative number** (input field)
 - Fax** (input field)
 - Email** (input field)
- Physical address**
 - Address *** (input field)
 - Suburb** (input field)
 - Postcode *** (input field) with a 'Find Postcode' link
- Postal address**
 - Same as physical address
 - Address *** (input field)
 - Suburb** (input field)
 - Postcode *** (input field) with a 'Find Postcode' link
- Add Cost Center** (button) and **Cancel** (button)

Account -

| Summary | Contact Details | Statements/Invoices | Transactions | Cost Centres | Cards | Reports |
|---------|-----------------|---------------------|--------------|--------------|-------|---------|
|---------|-----------------|---------------------|--------------|--------------|-------|---------|

[Cost centres](#) > **Admin - 20**

Cost centre number 20
Cost centre name Admin

Contact details

Contact
Phone number
Mobile
Alternative number
Fax
Email

Physical address

857 Rotongaro Road
3772

Postal address

857 Rotongaro Road
3772

Account -

| Summary | Contact Details | Statements/Invoices | Transactions | Cost Centres | Cards | Reports |
|---------|-----------------|---------------------|--------------|--------------|-------|---------|
|---------|-----------------|---------------------|--------------|--------------|-------|---------|

[Cost centres](#) > **Admin - 20**

*** Required Fields**

Cost centre number 20
Cost centre name *

Contact details

Contact *
Phone number *
Mobile
Alternative number
Fax
Email

Physical address

Address *
Suburb
Postcode * [Find Postcode](#)

Postal address

Same as physical address
Address *
Suburb
Postcode * [Find Postcode](#)

2.6 Manage Cards

In Manage Cards you can:

- Export a card listing to CSV file
- View Card details
- Edit Card details
- Terminate a Card
- Replace a Card
- Transfer Cost Centres

Export a Card Listing



Welcome . [log off](#) [profile](#)

Manage Account Update My Profile

Search for accounts

Account number

Account name

Trading name

Contact name

Search for cardholder

Card number

Registration

Recent Accounts

Quick Links

- [Request new card](#)
- [Manage card \(products, limits ...\)](#)
- [View an invoice](#)
- [Run a transaction report](#)
- [Update contact details](#)
- [Find merchant](#)

Account -

Summary | Contact Details | Statements/Invoices | Transactions | Cost Centres | **Cards** | Reports

Cards

Card number

Advanced search

Cardholder search results

| Card | Registration Number | Issue Date | Expiry Date | Status | Cost centre | Actions |
|------|---------------------|------------|-------------|--------|-------------|--|
| | | 12/03/2021 | 31/03/2024 | Active | | <ul style="list-style-type: none">- Select Action -- Select Action -View DetailsEdit Card DetailsTerminate CardReplace CardChange Cost Centre |

[< Page 1 of 1 >] Goto page

View Details

Clicking view details will display the cardholder details

Search for accounts

Account number

Account name

Trading name

Contact name

Search for cardholder

Card number

Registration

Recent Accounts

- [Kiwi Fuel Cards Limited](#)

Quick Links

- [Request new card](#)
- [Manage card \(products, limits ...\)](#)
- [View an invoice](#)
- [Run a transaction report](#)
- [Update contact details](#)
- [Find merchant](#)

Summary | **Contact Details** | Statements/Invoices | Transactions | Cost Centres | **Cards** | Reports

Plastic Type
Card number
Expiry date
Cost centre
Card type
Product allowed
Card Sent for Creation
In progress
Card Dispatched

Status Active

CardHolder details

Cardholder
Reference number

Contact details

Contact
Phone number
Work number
ContactNotes
Contact Address Physical Postal

Financial

| | |
|-------------------|----------|
| Available balance | \$157.31 |
| Monthly limit | \$500 |
| Transaction limit | \$150 |
| Daily limit | \$300 |

[Replace card](#) [Terminate](#) [Change Cost Centre](#)

Edit Card Details

Clicking Edit Card Details allows you to update card and cardholder details. When you have finished updating click 'update details' at the bottom left of the page.

| | | | | | | |
|----------------|------------------------|----------------------------|---------------------|---------------------|--------------|----------------|
| Summary | Contact Details | Statements/Invoices | Transactions | Cost Centres | Cards | Reports |
|----------------|------------------------|----------------------------|---------------------|---------------------|--------------|----------------|

[Cards](#) > > **Edit Details**

Plastic Type [Redacted]
Card number [Redacted] Status Active
Issue date 12/03/2021
Expiry date 31/03/2024
Cost centre Product allowed Fuel and Oil - Current
Card Sent for Creation Monday, 15/03/2021 05:30
In progress Monday, 15/03/2021 05:33
Card Dispatched Monday, 15/03/2021 18:04

Cardholder Details

Cardholder [Redacted]
Card type [Redacted]
Reference number [Text Input]

Contact details

Contact * [Text Input]
Phone number * [Text Input]
Work number [Text Input]
Mobile [Text Input]
Work phone [Text Input]
Email [Text Input]
ContactNotes [Text Input]

Contact Address

Physical address

Address * [Text Input]
[Text Input]
Suburb [Text Input]
Postcode * [Text Input] [Find Postcode](#)

Postal address

Same as physical address
Address * [Text Input]
[Text Input]
Suburb [Text Input]
Postcode * [Text Input] [Find Postcode](#)

Financial

Our control features allow you to assign monthly, daily and transaction spend limits to each card. Once the lowest limit is reached the card holder will not be able to make any purchases until the new period commences. These are optional fields, if no value is specified, no limit will be applied.

Monthly limit 500
Transaction limit 150
Daily limit 300

Please call us on 0800 727 863 if you require clarification or help with this feature

Update Details **Cancel**

Terminate Card

Selecting terminate card will allow you to terminate a card on your account. Select the termination reason and click 'terminate card'

Terminate Card -

| | | | | | | |
|---------|-----------------|---------------------|--------------|--------------|--------------|---------|
| Summary | Contact Details | Statements/Invoices | Transactions | Cost Centres | Cards | Reports |
|---------|-----------------|---------------------|--------------|--------------|--------------|---------|

Terminate Card

This option terminates the card with immediate effect without replacing you with a new card. The card cannot be reinstated. If you want to have a new card issued with the same settings (eg card is Lost) then we recommend you use the 'Replace' card option.

Termination date

Reason for terminating card

Terminate card

You are about to terminate this card, this means from the termination date the card can no longer be used. The card cannot be reinstated.

Do you wish to continue?

Replace Card

If you need to replace a card, select 'replace card' from the drop down. This will take you to the below screen.

Manage Account Update My Profile

Search for accounts
Account number
Account name
Trading name
Contact name

Search for cardholder
Card number
Registration

Recent Accounts

- [Kiwi Fuel Cards Limited](#)

Quick Links

- [Request new card](#)
- [Manage card \(products, limits ...\)](#)
- [View an invoice](#)
- [Run a transaction report](#)
- [Update contact details](#)
- [Find merchant](#)

Account -

Summary | Contact Details | Statements/Invoices | Transactions | Cost Centres | **Cards** | Reports

Cards > **Replace Card**

A quick and easy way to order a replacement for damaged/worn, lost or stolen cards. A new card will be issued to you, however all the existing card settings will be transferred. If you have chosen Lost or Stolen, the card cannot be used with immediate effect. If you have chosen Worn/Damaged or Other, your existing card will be terminated after 14 days. Your new cards will be in the post shortly. For assistance or clarification please call us on 0800 727 863

Cardholder **Kiwi Fuel Card STAFF**
Reason for card replacement **Destroyed**

Physical address

Contact name(physical address)
Phone number(physical address):
Work
Mobile
Alternate
Email
Address
Suburb
Postcode

Postal address

Contact name(postal address)
Phone number(postal address)
Work
Mobile
Alternate
Email
Address
Suburb
Postcode

Select a replacement reason and click continue

For changes to vehicle descriptions and registrations, you are required to order new cards.

Change Cost Centre

Selecting 'Change cost centre' allows you to change the cost centres allocated to your cards

Summary **Contact Details** **Statements/Invoices** **Transactions** **Cost Centres** **Cards** **Reports**

Cards Request new card

Card number

Advanced search

[Clear search filters](#) Search

Cardholder search results

Export

| Card | Registration Number | Issue Date | Expiry Date | Status | Cost centre | Actions |
|------|---------------------|------------|-------------|--------|-------------|--|
| | | 12/03/2021 | 31/03/2024 | Active | | Change Cost Centre <input type="text"/> |

|<< Page 1 of 1 >>| Goto page Rows per page 10

Type the cost centre into the Cost Centre name box – this will auto populate as you type. Then click 'transfer'

Transfer Cost Centre

Please enter the Cost Centre name to transfer.

| | | |
|---|----------------------|------|
| Card number | 7076 | 2286 |
| Cost centre name | <input type="text"/> | |
| Transfer Cancel | | |

Order New Fleet Card

Click Request New Card

Account -

| | | | | | | |
|---------|-----------------|---------------------|--------------|--------------|--------------|---------|
| Summary | Contact Details | Statements/Invoices | Transactions | Cost Centres | Cards | Reports |
|---------|-----------------|---------------------|--------------|--------------|--------------|---------|

Cards Request new card

Card number

[Advanced search](#)

Fill in all the new card details and click continue.

| | | | | | | |
|---------|-----------------|---------------------|--------------|--------------|--------------|---------|
| Summary | Contact Details | Statements/Invoices | Transactions | Cost Centres | Cards | Reports |
|---------|-----------------|---------------------|--------------|--------------|--------------|---------|

Request new card

Cardholder Type Details Check Details Complete

Card type
Plastic Type

Cardholder details

Cardholder As per how it should be embossed on CardSmart card

Internal reference

Financial

Our control features allow you to assign monthly, daily and transaction spend limits to each card. Once the lowest limit is reached the card holder will not be able to make any purchases until the new period commences. These are optional fields, if no value is specified, no limit will be applied.

Transaction limit Leave blank for no limit

Daily limit Leave blank for no limit

Monthly limit Leave blank for no limit

Product allowed

Displayed on card

Card number

Company name

Cardholder

Expiry date

Description

Physical address

[Select Address](#)

| | |
|---------------------------------|--|
| Contact name(physical address) | |
| Phone number(physical address): | |
| Work | |
| Mobile | |
| Alternate | |
| Email | |
| Address | |
| Suburb | |
| Postcode | |

Postal address

[Select Address](#)

| | |
|------------------------------|--------------------------------|
| Contact name(postal address) | Sam Steel |
| Phone number(postal address) | 095747723 |
| Work | |
| Mobile | |
| Alternate | |
| Email | accounts@fleetcor.co.nz |
| Address | Private bag 99918 Newmarket |
| Suburb | |
| Postcode | 1149 |

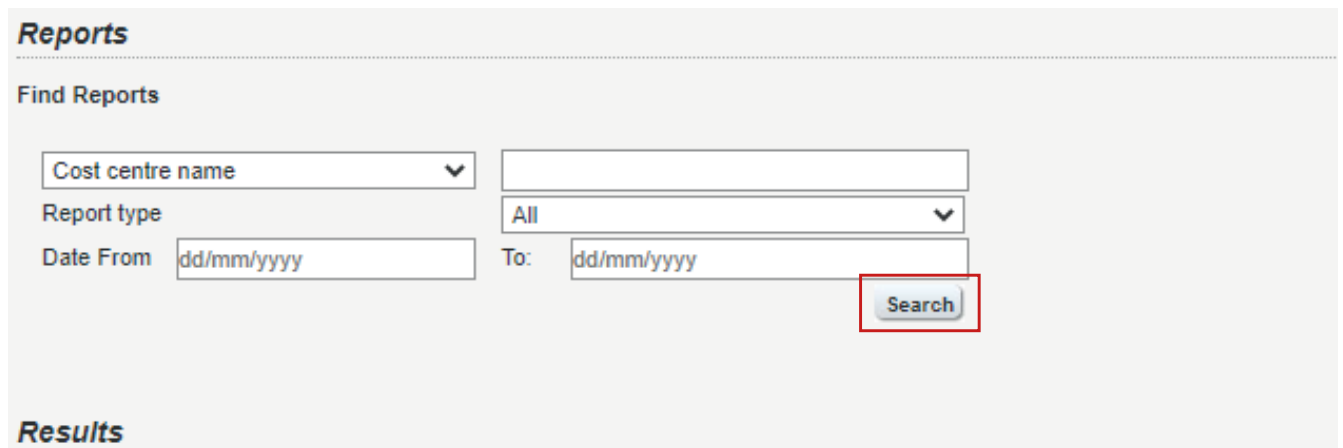
[Continue](#)

Confirm details are correct and click submit request and your card will be ordered.

2.7 Reports

There are 3 reports available

1. Vehicle Analysis
2. Vehicle Report
3. Exception Report



The screenshot shows a web interface for finding reports. It features a header section titled "Reports" with a dotted line separator. Below this is a "Find Reports" section containing several input fields: a dropdown menu for "Cost centre name", a text input field, a dropdown menu for "Report type" with "All" selected, a "Date From" field with a date mask "dd/mm/yyyy", and a "To:" field with a date mask "dd/mm/yyyy". A "Search" button is located at the bottom right of the search criteria, highlighted with a red rectangular box. Below the search fields is a section titled "Results".

Select your criteria and click search.

Your reports will be displayed in a list – click 'download' to view your report.

If you have any questions please call our customer service team 0800 663 866 or email us on customer@cardsmart.co.nz