

**eZCard
Manual**

**PAYMENT
SOLUTIONS**

eZCard Manual



For all support-related inquiries, contact our support team:
Phone: 877.346.1412
Monday – Friday, 8:00 a.m. – 6:00 p.m. Central Time, except Federal holidays
Email: CommercialCards@htlf.com

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ENROLLMENT

SET UP

Step 1: Go to ezcardinfo.com to enroll.

Log In to Your Account

Username 

[Forgot your username?](#)

Don't have an account? Register for online access to your account so you can:

- Analyze your spending
- Review your statements
- Pay bills online

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

Step 3: Enter Account Details

Name on Card

Card Expiration Date



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

Email Address

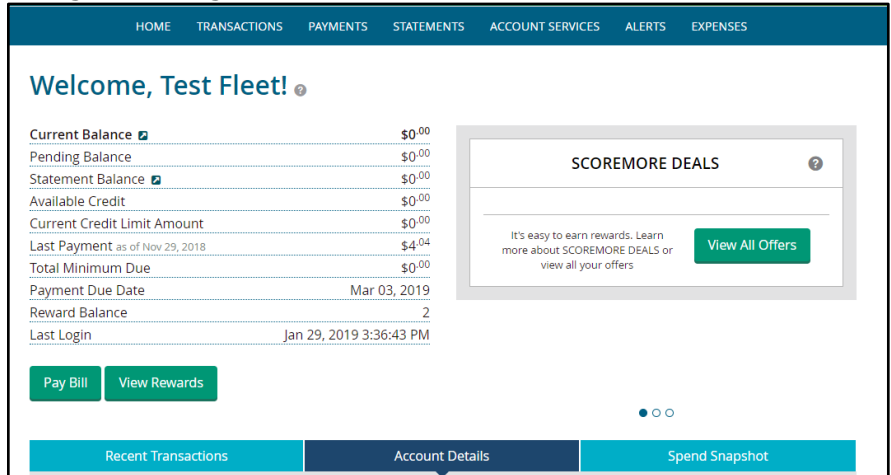
Validation Requested

ACCESSING ACCOUNT DETAILS

VIEW CURRENT BALANCE, AVAILABLE CREDIT AND STATEMENT INFORMATION

Step 1:

Navigate through Home > Account Details



TRANSACTIONS

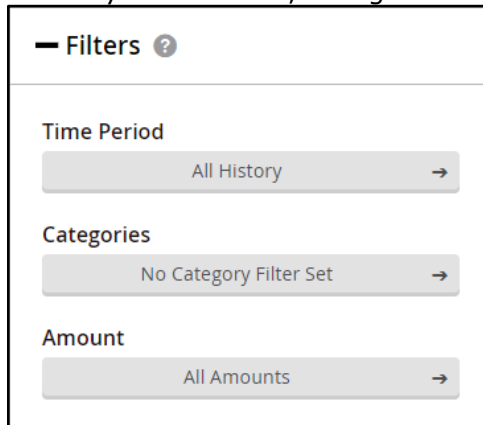
SEARCH AND EXPORT

Step 1:

Navigate through Transactions > Search Transactions

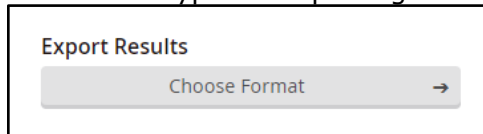
Step 2:

Filter By Time Period, Categories or Amount.



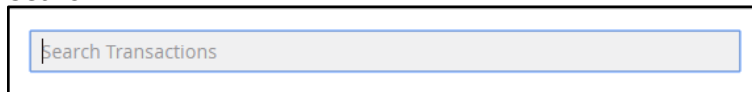
Step 3:

Choose file type for exporting.



Step 4:

You may input text into the Search Transactions box to refine your search.



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:
Step 2:

Navigate through Transaction > Transactions Search
Select transaction, then click "Dispute This Charge," and follow the prompts.

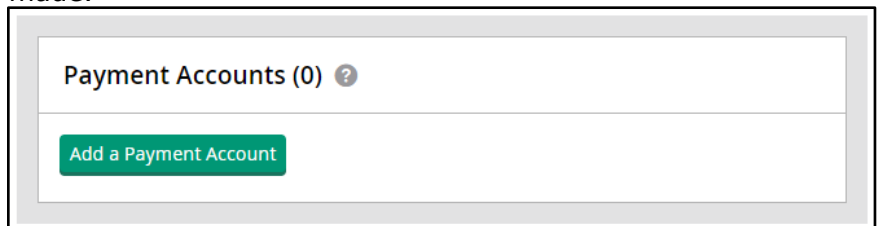
SEP 23, 2018	\$2.00
CONOCO - SEI 29063	AUTO RELATED
^	
Post Date: Sep 23, 2018	Transaction Type: Purchase
Transaction Date: Sep 21, 2018	Original Amount: \$2.00
City/St: MERRIAM , KS	Original Currency: USD
Zip: 66204	MCC: 5542
Country Code: US	MCC Description: Automated Gasoline Dispensers
Category: Auto Related	Merchant ID: 650000009124747
Transaction Code: 05	Originating Account #: -
Reason Code: 00	Edit Dispute This Charge

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:

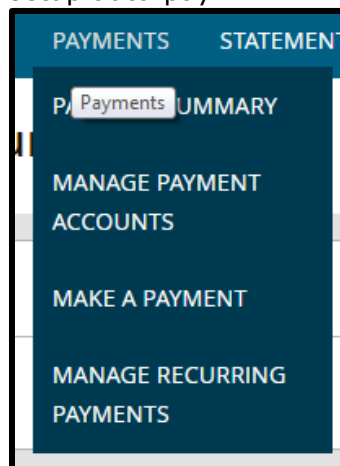
Navigate through Payments > Make A Payment to process a payment.

OPTION 2:

Navigate through Payments > Payment Summary to view pending payments.

OPTION 3:

Navigate through Payments > Manage Recurring Payments to setup auto-pay.



STATEMENTS

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).

Statements (7)

[View Statement PDFs](#)

February 18 2019 Statement Period

Previous Balance: \$0.00	Payments: \$0.00
Purchases: \$0.00	Other Charges: \$0.00
Cash: \$0.00	Finance Charges: \$0.00
Special: \$0.00	New Balance: \$0.00
Credits: \$0.00	Total Minimum Due: \$0.00
	Payment Due Date: Mar 03, 2019

[View Transaction Detail](#) [Make A Payment](#)

February 04 2019 Statement Period

STATEMENT PREFERENCES

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

Statement Delivery Options

Electronic

Mail

- 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."

In order to continue, your ability to download and view PDF files must be verified.

[Start Verification](#)

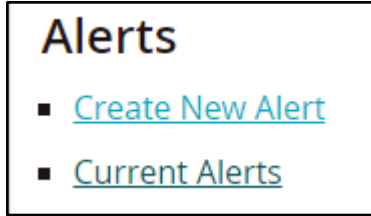
[Agree and Verify](#) [Cancel](#)

SETTING ALERTS

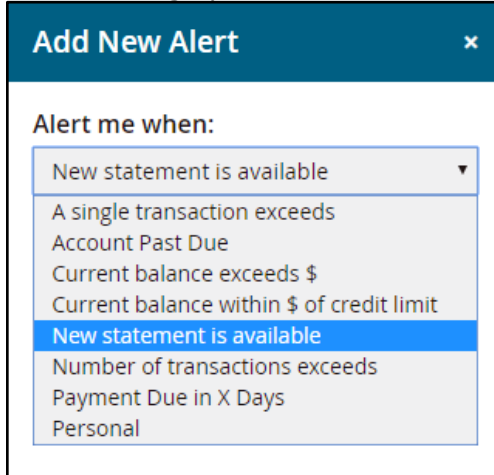
Step 1:

Step 2:

Navigate through Account Services > Alerts
To create alerts, select Create New Alert.

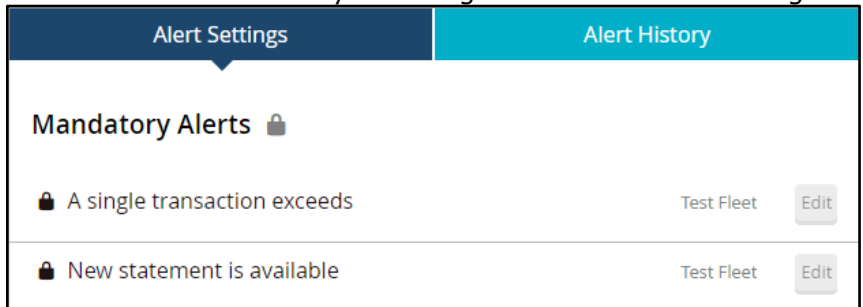


The following options are available:



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.

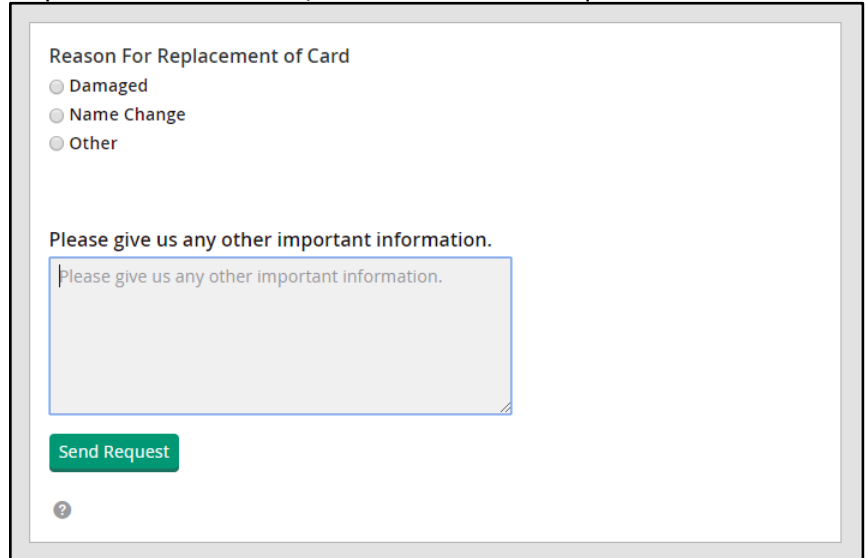


REPLACEMENT CARD

Step 1:

Step 2:

Navigate through Account Services > Request Replacement Card
Select reason for replacement card and provide any other important information, and click "Send Request."



Reason For Replacement of Card

- Damaged
- Name Change
- Other

Please give us any other important information.

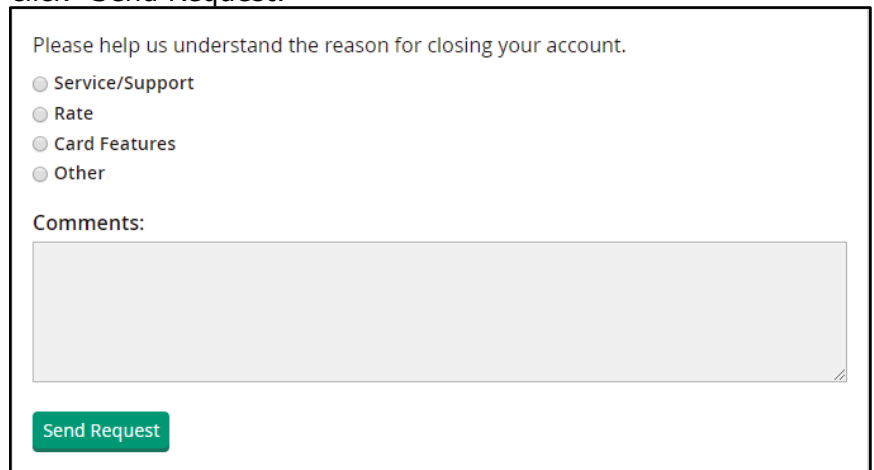
Please give us any other important information.

CLOSE ACCOUNT

Step 1:

Step 2:

Navigate through Account Services > Close Account
Select reason for closing the account, provide any comments, and click "Send Request."



Please help us understand the reason for closing your account.

- Service/Support
- Rate
- Card Features
- Other

Comments: