eCardlink Description and Features

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What Is It?

The eCardlink module is a website that allows your cardlock customers to access their account information and make changes to their account on-line, without needing to directly contact your customer service department. This saves your company money and time, freeing up customer service resources to better serve more complicated problems. It also makes life easier for your cardlock customers, as they can now do research on their accounts and request changes at their convenience, any time of the day or night.

There are four basic areas where your customers can see and change information: invoices, transactions, cards, and contact information. More detail on each of these categories is given in the rest of this document.

Invoices

Using the eCardlink website, your customers can view or print a copy of any invoice they have received. The reprint will be an exact image of the text and layout of the printed invoice. Even your preprinted forms, if you use them, can be reproduced on the website and overlaid onto the reprinted invoices.

In order to view reprinted invoices, your customers must have the Adobe Acrobat Reader installed on their computer. This program is freely available and in wide use, and we have provided a link to the installation page on the eCardlink website for your customers' convenience.

Transactions

All transactions, both current and history, are available on the eCardlink website. In the database, these transactions are stored in different files, so that the most common searches for current transactions can happen quickly. However, on the Internet, your customers will see no distinction. If the range of dates they choose to report on is in the current file, the report will be pulled from that faster file. If the range of dates includes history transactions, the report will pull from both files.

Transaction information can be filtered by date, card number, or vehicle number. It can be sorted on any of those fields, and also on product or site. This flexibility allows your customers to get essential information quickly. For example, they can print a report of all transactions by a particular driver, or they can track the movements of a particular vehicle. A company that uses only diesel fuel could run a report sorted by product, to quickly identify non-diesel purchases that may be fraudulent. These options are all easily accessible.

Transaction information can be viewed on the website directly, or it can be downloaded as a CSV file which can be loaded directly into Excel. For convenience, the customer can choose to receive the CSV file directly over email. The ability to load these reports into Excel allows almost endless flexibility of sorting and reporting for your customers, and is one of the most popular features of the eCardlink module.

The following information is available for each transaction:

Date and Time	Driver card number and driver name
Location	Vehicle card number and vehicle description
Product	Odometer and Misc entries
Quantity	Group ID
Unit Price and Total Invoice Price – *Price information is only available for invoiced transactions*	

Cards

Both driver cards and vehicle cards can be viewed and maintained on the eCardlink website. Your customers can generate a card list of either driver cards or vehicle cards, and can choose whether the list should include inactive cards or not. As with the transaction reports, they can choose to view the report on the website, or receive it as a CSV file either directly or through email.

The card reports including the following information about each card:

- Card Number
- Description
- Status (Active or Inactive)
- Card Type
- Permissions for Unleaded, Midgrade, Premium, Diesel, and Oil
- Date the card was last used
- Group ID
- Whether Odometer and Misc entry are enabled for the card
- PIN, if allowed. Each website user can be allowed to see PINs or restricted from seeing PINs.

Your customers can also request changes to their cards on the website, and those requests will be forwarded by email to your Customer Service department (or any other email address you choose) to be processed. Specifically, your customers can request new cards, request to have cards locked out, request to replace cards, and request to change a card's description.

Contact Information

Your customers can view and request changes to their address and phone contact information on the eCardlink website. When they request a change, that change will be emailed to your Customer Service department (or any other email address you choose) for processing in the same way that card changes are sent.

User Account Setup

We will initially set up as many Administrative users at your company as you desire. These Administrative users, in turn, set up accounts for your customers. If you choose, you can also give some customers (or even specific accounts at a customer) the ability to create or delete other accounts tied to that customer.

All web user accounts have access to any information that is available, with the exception of card PINs. Each website user can be set up by your company's administrators to either have access or not have access to PINs, as your customers desire. Also, all web user accounts can request changes; however, each change request email specifies who made the request, so requests from certain users could be ignored.

Some website users may need access to more than one account number in your cardlock system. For example, a central office user may need to have access to the accounts for a number of branches. This is possible using the eCardlink website. Each website user can be set up to access as many different cardlock account numbers as necessary.

When a website user that has access to more than one account logs into the eCardlink website, he will be shown a list of the account numbers he has access to and asked to choose one of them to use for that session. After using that account number, if he wants to switch to a different one, he will have to return to the selection page and choose a new account. Transaction reports (the Transaction Inquiry and Fuel Summary reports) can be run for all allowed accounts at the same time, and automatically merged into a single file for downloading.

Company Image Branding

We took great pains to make sure that, from the perspective of your customers, the eCardlink site is part of your company's web presence. This applies even if you use our ASP Hosted service.

When we set you up as an eCardlink customer, we will obtain electronic copies of your company logo. These will be loaded onto the website, so that every time one of your customers logs into the eCardlink site, every page within the site will show your logo. DM2 will not be mentioned anywhere on the site.

If you are using the ASP Hosted option, then you are sharing the website with other cardlock companies. We use two methods to make sure that another company's logo never appears when one of your customers accesses the eCardlink website.

- **Cookies**
  When one of your customers first accesses the generic www.ecardlink.com website, they will not see your company logo… they will see only a generic eCardlink logo. However, when they log in the first time, our site stores a "cookie" on their system. From that time on, every time they access the eCardlink site, it will know that they are one of your customers, and show your logo from the very first page onward.

- **URL (yourcompany.ecardlink.com)**
  As a secondary option, we will set up a separate URL, or website address, specifically for your company and your customers. For example, if your company name was "We Sell Gas", we could set up the name "wesellgas.ecardlink.com". You will be able to choose the name that best fits your company's branded image. Any customer accessing the site using that particular address will always be shown your company's logo, even if they have never logged onto the site before.

If your corporate website uses frames, the eCardlink site can be embedded directly into your corporate site so that the user experience is seamless. If you are interested in this feature, make sure to let your DM2 salesperson and installer know, as there may be some extra charges involved in setting up this option.