



*Business MyCardInfo*  
Consolidated Account Setup:  
Company User



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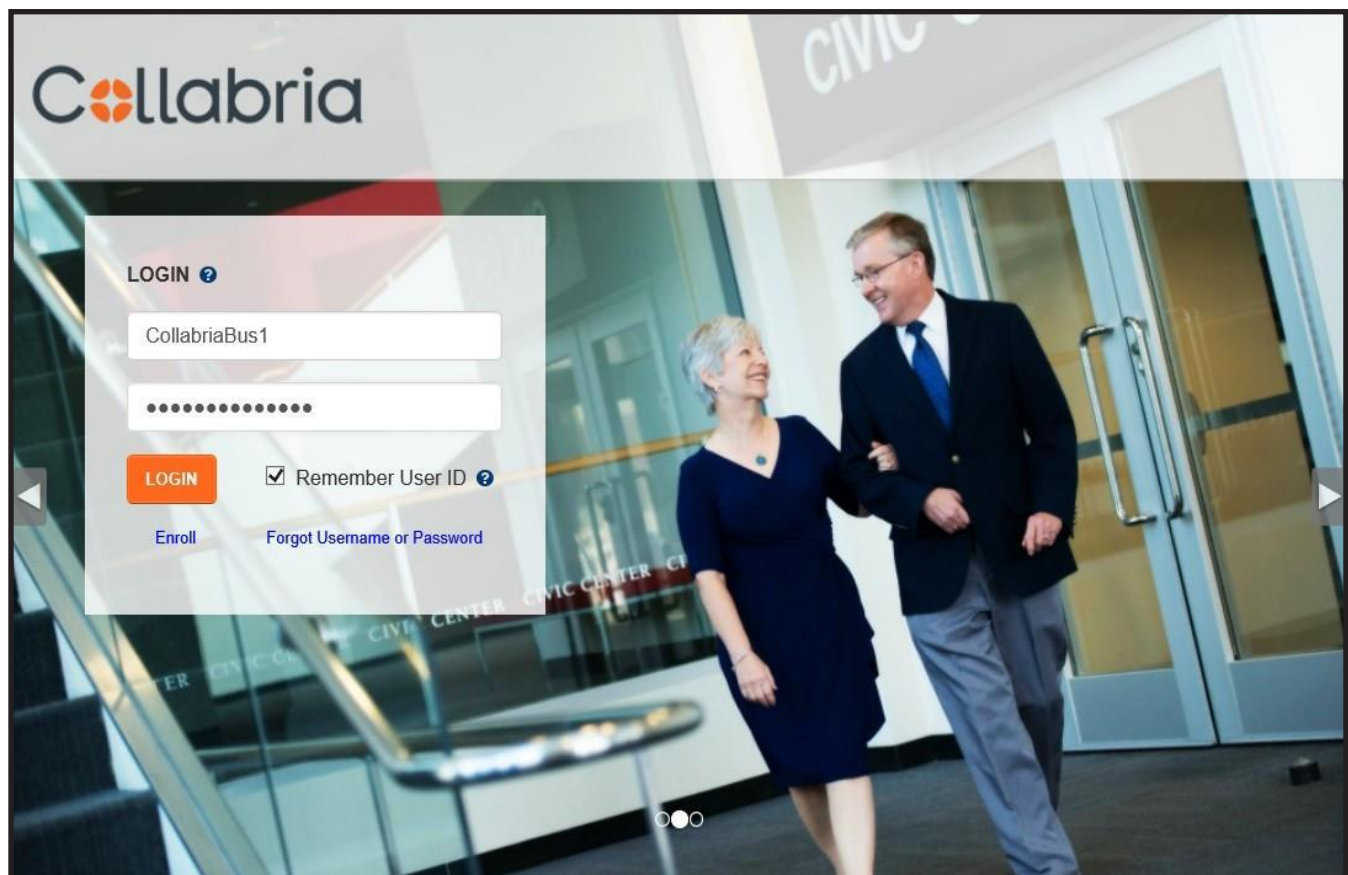
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## OVERVIEW

The MyCardInfo site allows the Authorized Business Representative (Company User) to manage company credit card accounts at their convenience.

A Company User can:

- View account information at a company level
- View subaccount information
- View real-time balance and statement information for each card on the company account
- Elect and view eStatements
- Make payments
- Adjust subaccount credit line
- Download account change forms
- Submit transaction disputes
- Place a travel status



## BUSINESS ACCOUNT SETUP AND USERTYPES

There are two types of account configuration available upon business account creation. These two options are Consolidated and Individual. The business account setup will determine which entitlements are available to the end user. Each account setup option allows two user types within MyCardInfo: Company User or Regular User.

### Consolidated Account Setup

Business accounts with a consolidated account setup have an overall Company Master/Holding Account and multiple subaccounts. Each subaccount consists of one cardholder within the company. A company may have multiple subaccounts. The Company Master Account is controlled by an Authorized Business Representative, designated during account creation. Consolidated Business Accounts are characterized by:

- One overall company statement with subaccount memo statements available
- Rewards earned will roll up to the Company Master Account
- The company will have one aggregate company credit limit
- Subaccount credit limits within the aggregate company credit line can be managed by the Authorized Business Representative through MyCardInfo
- Transactions made by each subaccount can be viewed through the Company User login issued to the Authorized Business Representative at the business

### Individual Account Setup

Business accounts with an Individual Account Setup do not have an overall Company Master/Holding Account. Each individual account functions independently. Individual Accounts are characterized by:

- Payments are applied to each individual account
- Rewards are retained at a card level on the business account
- Individual cardholders will receive billing statements
- Individual cardholder accounts have set credit limits within the aggregate company credit line

### MyCardInfo User Types

**Company User** - This MyCardInfo access is reserved for the Authorized Business Representative (ABR) designated by the company at the time of application. As the Company User, an ABR will have visibility and administrative permission over all cardholders on the business account.

**Regular User** - A Regular User will be able to view information pertaining to their card only. This user type is automatically assigned to employees who enroll their cards in MyCardInfo.

Business MyCardInfo  
Consolidated Account Setup: Company User

The following is a chart showing the different Business MyCardInfo user types and features. Each setup has a separate manual. This manual is for **Consolidated Company User**.

	<b>Consolidated Company User</b>	<b>Consolidated Regular User</b>	<b>Individual Company User</b>	<b>Individual Regular User</b>
<b>Account Info Tab</b>	x	x	x	x
Account Overview	x	x	x	x
Dashboard	x	x		x
Account Activity	x	x	x	x
Account Profile	x	x	x	x
Security Alerts	x		x	x
eStatements	x	x	x	x
<b>Payments Tab</b>	x		x	x
Make a Payment	x		x	x
View/Edit Payments	x		x	x
Payment Account	x		x	x
<b>Account Services Tab</b>	x	x	x	x
Fraud Alerts		x		x
Change Credit Line	x			
Dispute Transactions	x	x	x	x
Update My Account	x		x	
Travel Center		x		x
Rewards	x			x
Mastercard SecureCode Or Verified by Visa		x		x
<b>Help &amp; Info Tab</b>	x	x	x	x
Contact Us	x	x	x	x
Privacy Policy	x	x	x	x
Terms and Conditions	x	x	x	x
FAQ	x	x	x	x

## RESET LOGIN CREDENTIALS

To reset a Company User's login credentials, please contact Collabria Cardholder Services at 855.341.4643.

## Business MyCardInfo Consolidated Account Setup: Company User

### ENROLL

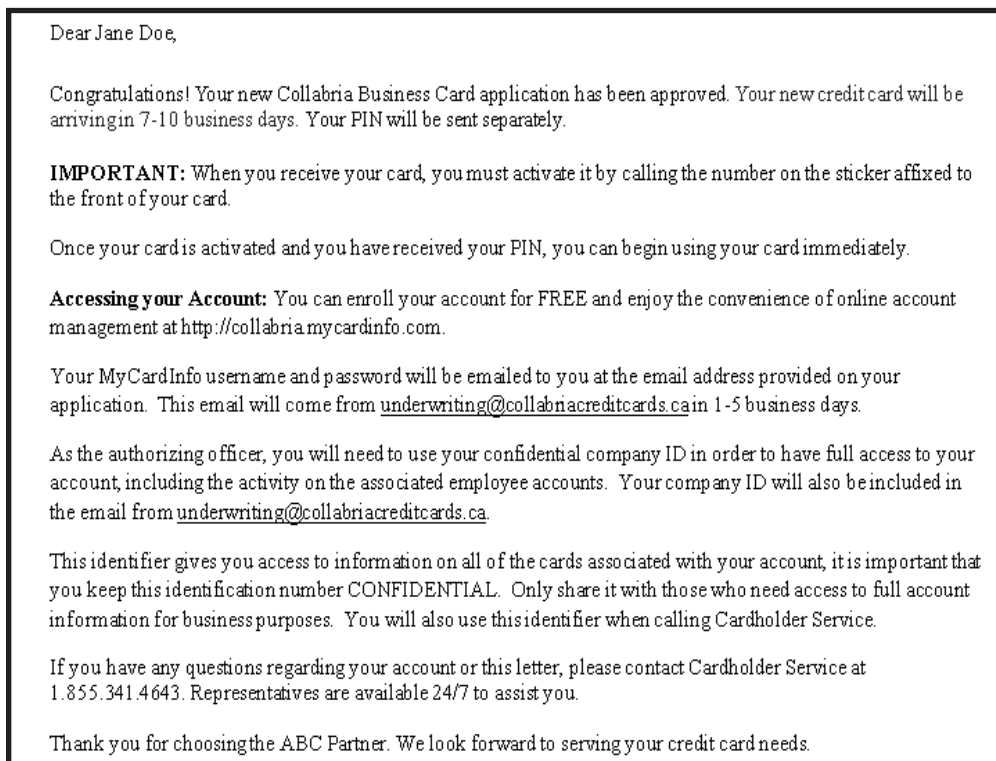
First time MyCardInfo users will need to enroll their Company User account.



To login:

1. The Authorized Business Representative will receive a Welcome Communication after the business account is approved. This Welcome Communication informs the recipient the MyCardInfo Company User password and username will be emailed to the Authorized Business Representative's email address provided on the business application.

#### Example Welcome Communication:



2. Enter the "Username" and "Password" provided in the follow up email delivered to the Authorized Business Representative of the business account.
3. Click "Continue."

Your password and security code have been reset by the system administrator and needs to be changed.

### Change Password

Enter new Password

Username: **CompanyUser1!**

Password:  ⓘ

Confirm Password:

### Select Your Security Code

Security Code:  ⓘ

Confirm Security Code:

4. Establish a new password. It must meet the following requirements:
  - a. Length must be a minimum of 7 characters
  - b. Must contain at least one letter
  - c. Must contain at least one number (0-9)
  - d. Must contain at least one symbol
5. Establish a Security Code. This is different than the CVV/CVC code on the back of the business card. It should be a personal code known only to the Company User and a minimum of 4 characters. The Security Code is a feature which helps protect online access to the account by requiring a second step of user verification.

### Screen Response:

Password has been changed.  
Personal Security code has been changed.

6. Click  .

**User logged in successfully**

Is this computer a trusted computer that you would like to authorize for future use with this account?

**AUTHORIZE** DO NOT AUTHORIZE

- By selecting “Authorize,” the next login to the MyCardInfo account on the current computer will not prompt the user to input their Security Code after entering their username and password.

Screen Response:

**Email Address**

Welcome back to MyCardInfo! To help us more efficiently service your account in the future, please provide a current email address below.

Email Address:

Confirm Email Address:

I agree to the Privacy Policy.


<  >

Submit Remind Me Later

- Confirm Email Address.
- Check the box to agree to the Collabria Privacy Policy.
- The homepage will appear once the account is enabled.



Screen Response:



🏠
ACCOUNT INFO ▾
PAYMENTS ▾
ACCOUNT SERVICES ▾
HELP & INFO ▾

## Consolidated, Company User

Account # XXXX-0021

[Account Overview](#) ?

- \* Click on Account to display Current Transaction History
- \* Click on the "+" sign to view Sub-accounts under each Control Account
- \* Click on Make Payment to Pay Amount Due

LAST LOG IN

**Control Accounts:**

ACCOUNT NUMBER	NAME ON ACCOUNT	CREDIT LIMIT	CURRENT BALANCE		E-STMTS?
⊕ XXXX-0021		\$250.00	\$109.31	<a href="#">Make Payment</a>	No

**Quick Links**

- [Account Overview](#)
- [Account Activity](#)
- [Account Profile](#)

## ACCOUNT OVERVIEW

Account Overview provides an at-a-glance summary of the account. Cardholders may view the Current Balance, Company Credit Limit or Make a Payment.

Along with these options, users can print or view all pending authorizations and posted transactions.

### Consolidated, Company User

Account Number ending in 0161

[Account Overview](#) ⓘ

**Current Payment Due:**

**\$31.00**

Payment Due:  
09/28

**MAKE PAYMENT**

**Current Balance:**

**\$31.00**

Available Credit:  
\$969.00 of \$1,000.00

**RECENT ACTIVITY**

**Last Statement Balance:**

**\$31.00**

Last Statement Date  
09/07

**VIEW STATEMENT**

⚠ Payment is past due

\* Click on Account to display Current Transaction History  
\* Click on the "+" sign to view Sub-accounts under each Control Account

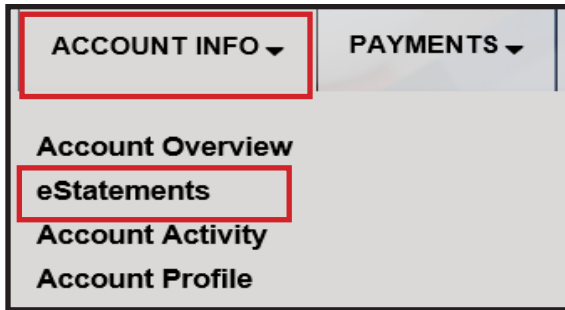
1. Click on "Account Number" to display the current transaction history.
2. To view subaccount information, click the "+" located next to the Control Accounts header to view the subaccounts under the Control Account.

### Screen Response:

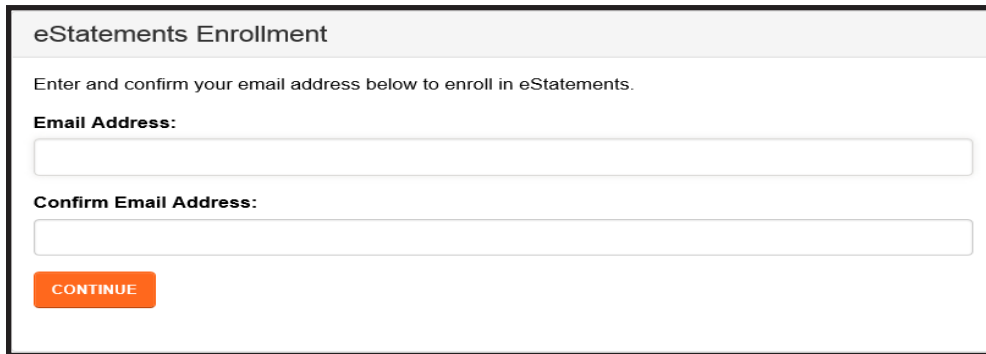
Control Accounts:				
ACCOUNT NUMBER	NAME ON ACCOUNT	CREDIT LIMIT	CURRENT BALANCE	E-STMTS?
<input type="checkbox"/> <a href="#">Ending in 0161</a>	WORLD,PUPPY	\$1,000.00	\$31.00	No
ACCOUNT NUMBER	NAME ON ACCOUNT	CREDIT LIMIT	CURRENT BALANCE	E-STMTS?
<a href="#">Ending in 0179</a>	EUGENE,MURPHY	\$100.00	\$0.00	No

## eSTATEMENT ENROLLMENT

Company Users may access the eStatements enrollment screen in MyCardInfo. Hover over the Account Info tab and select eStatements from the drop-down menu.

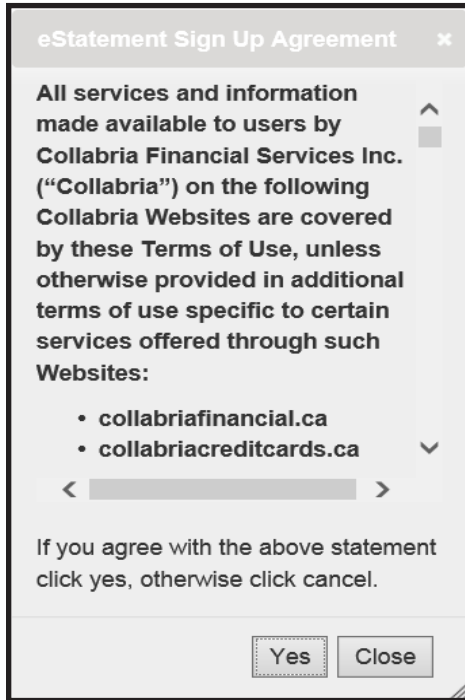


### Screen Response:

A screenshot of a web form titled 'eStatements Enrollment'. The form contains the following elements: a header with the title 'eStatements Enrollment'; a sub-header with the text 'Enter and confirm your email address below to enroll in eStatements.'; a label 'Email Address:' followed by a text input field; a label 'Confirm Email Address:' followed by a text input field; and an orange button labeled 'CONTINUE' at the bottom left.

1. Enter and confirm a valid email address to enroll in company eStatements.
2. Then select the "Continue" button.

Screen Response:



3. Click on **Yes** to agree to the eStatement Disclosure Terms and Conditions.

**Note:** A confirmation email will be automatically sent to the enrolled email address.

## Add an Additional eStatement Email

1. Select the "Add Additional Email Add for eStatement Alerts" button.

Screen Response:

A screenshot of a form titled "Add additional email address for eStatement alerts". The form has two input fields: "Email Address:" and "Confirm Email Address:". At the bottom of the form, there are two buttons: "+ ADD EMAIL" and "CANCEL".

2. Enter the additional email and click "+ Add Email".

## Sample Email





---

Account Number: XXXX-XXXX-XXXX-0021

---

This is your confirmation email for enrollment in eStatements.

---

PLEASE DO NOT REPLY TO THIS EMAIL, emails sent back to this address will not be received.

If you have difficulty connecting to mycardinfo using the link above, cut and paste the following URL into your browser.

<https://collabria.mycardinfo.com>

This email and any files transmitted with it are confidential and intended solely for the designated recipient. Any other use of this email is prohibited. If you have received this email in error please notify the sender. Please note that any views or opinions presented in this email are solely those of the author and do not necessarily represent those of the company. Finally, the recipient should check this email and any attachments for the presence of viruses. The company accepts no liability for any damage caused by any virus transmitted by this email.

**Note:** Once enrolled, the user will receive an email alert notifying them when their eStatement is available for download in MyCardInfo.

## Resume Paper Statements

1. Select "Resume Paper Statements" from the eStatements Screen.

### eStatement User Profile

**Note:** If your email notification is returned to us undelivered, we may discontinue online statements and send you paper statements.

[Terms and Conditions](#)

Email Address	Type	
training@collabriafinancial.ca	e-Statements	<a href="#">Edit</a>

+ ADD ADDITIONAL EMAIL ADDRESS FOR ESTATEMENT ALERTS

RESUME PAPER STATEMENTS

## COMPANY eSTATEMENTS

eStatements are electronic copies of the account statement. Users can sign up for these statements to receive them electronically instead of in the mail. The eStatement section of MyCardInfo contains the eStatements Terms and Conditions and the ability to resume paper statements. Downloadable eStatements are available for up to 12 previous months.

### eStatement User Profile

**Note:** If your email notification is returned to us undelivered, we may discontinue online statements and send you paper statements.

[Terms and Conditions](#)

Email Address	Type	
training@collabriafinancial.ca	e-Statements	<a href="#">Edit</a>

[+ ADD ADDITIONAL EMAIL ADDRESS FOR ESTATEMENT ALERTS](#)

[RESUME PAPER STATEMENTS](#)

### eStatements

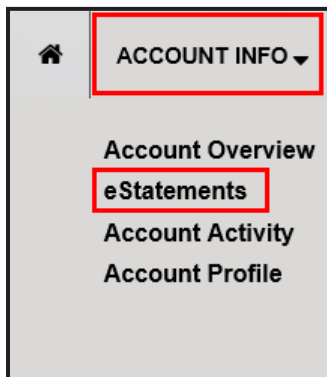
The following is a list of your online statements that are currently available. To view the statement, click on the respective date link.

[1/19](#)   [12/19](#)   [11/18](#)   [10/19](#)

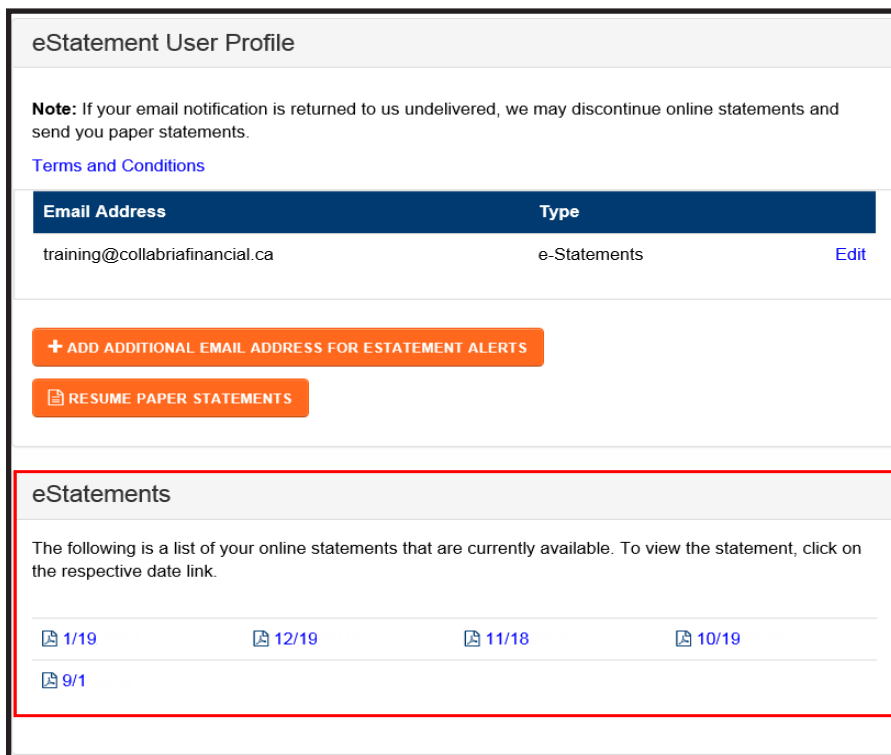
[9/1](#)

## VIEWING eSTATEMENTS

To access the eStatements screen, hover over the Account Info tab and select the “eStatements” option from the drop down menu.



### Screen Response:



- I. Click on the  icon to view the statement.

**Note:** A screen will appear, allowing a PDF of the statement to download.

MyCardInfo  
 Consolidated Account Setup: Company User

**Sample eStatement**

Collabria eStatements contain information that can be used to assist cardholders in-branch with their questions concerning their business account. Transactions will display which subaccount user made the purchase.

Refer to the eStatement for any of the following:

1. Credit limit
2. Available credit
3. New balance
4. Payment due date
5. Amount past due
6. Minimum balance

due Example eStatement:

		<b>Collabria</b> ACCOUNT NUMBER:	
<b>SUMMARY OF ACCOUNT ACTIVITY</b> Previous Balance \$31.20 -Payments \$0.00 -Other Credits \$31.20 <b>Total Credits \$31.20</b> +Purchases \$0.00 +Other Debits \$0.00 +Cash Advances \$0.00 +Past Due Amount \$0.00 +Fees Charged \$0.00 +Interest Charged \$0.00 <b>Total Debits \$0.00</b> <b>New Balance \$0.00</b>  Account Number Ending In Credit Limit Available Credit Annual Interest Rate - Purchases & Fees Annual Interest Rate - Cash Advances Statement Period 03/06 - 03/07 Days this Billing Cycle 30		<b>PAYMENT INFORMATION</b> New Balance \$0.00 <b>Minimum Payment Due \$0.00</b> <b>Payment Due Date 28/07</b>  <b>CONTACT US</b> For Cardholder Service, including reporting a lost or stolen card, please call: Canada and U.S.: 1.855.341.4643 International Collect: 1.515.343.8995  Send notice of billing errors to: Collabria PO Box 82029 RPO Connaught Calgary, AB T2R 0X1  Email: info@collabriacreditcards.ca Website: https://collabria.mycardinfo.com	
<b>New Balance</b>	<b>Payment Due Date</b>	<b>Amount Past Due</b>	<b>Minimum Payment Due</b>
\$0.00	28/07	\$0.00	\$0.00
An amount preceded by a minus sign (-) is a credit or credit balance.			
See reverse side for important information.			
<small>1058 MDH 002 7 2 150703 0 C PAGE 1 of 3 1 0 3393 0000 V002 01AB1058          Please detach this portion and return with your payment to ensure proper credit. Retain upper portion for your records.</small>			
Collabria PO Box 82029 RPO Connaught Calgary, AB T2R 0X1		New Balance \$0.00 Payment Due Date 28/07 Minimum Payment Due \$0.00 Amount Enclosed \$ <input type="text"/>	
<small>COLLABRIA          PAYMENT PROCESSING          CP 8417 SUCC CENTRE VILLE          MONTREAL QC H3C 3L4</small>			
443894000200018100000000000000000000			



## ACCOUNT ACTIVITY

Account Activity gives a detailed list of the most recent transactions on the account at a company level. All subaccount transactions can be filtered under Account Activity.

1. Select from the following options in the Account Activity drop down menu:

- a. Current Activity
- b. Most Recent Statement
- c. Previous Statements
- d. Search for account activity within a certain date range

After selecting one of these options from the drop down menu, click GO.

The screenshot shows the Account Activity interface. At the top, there is a date range selector set to "Jan 20, 2017 - Present", a search bar, and buttons for "FILTER", "Download", and "Print". A dropdown menu is open, showing the following options:

- Current Activity**
  - Jan 20, 2017 - Present
- Most Recent Statement**
  - Dec 20, 2016 - Jan 19, 2017
- Previous Statements**
  - Nov 20, 2016 - Dec 19, 2016
  - Oct 20, 2016 - Nov 19, 2016
- Date Range**
  - From MM/DD/YYYY
  - To MM/DD/YYYY
  - GO** (highlighted in a red box)

Below the dropdown, there is a "Cardholder Service" section with contact information for "Canada and U.S.:" and "Collabria".

2. To download or print account activity, click on the icons to the right.



3. Users may also search for specific transactions by entering keywords into the search bar.

A search bar with the text "Search" and a magnifying glass icon.

## ACCOUNT PROFILE

The user can change various account settings by navigating to the Account Profile. Click on the Account Info tab. Select Account Profile.

A navigation menu with two tabs: 'ACCOUNT INFO' and 'PAYMENTS'. Below the tabs is a list of menu items: 'Account Overview', 'eStatements', 'Account Activity', and 'Account Profile'. The 'ACCOUNT INFO' tab and the 'Account Profile' item are highlighted with red boxes.

Click on Enrolled Accounts to view and edit the account “nickname” tied to credit card account enrolled within MyCardInfo.

Enrolled Accounts		
ACCOUNT NUMBER	ACCOUNT NICKNAME	DEFAULT
xxxxxxxxxxxxxxxx	Default	<input checked="" type="checkbox"/>

Email Addresses		
EMAIL ADDRESS	TYPE	
training@collabriafinancial.ca	e-Statements	<a href="#">Edit</a>

Click on Email Addresses to view and edit which email address receives eStatement alerts. Users may also edit which email address is associated with their MyCardInfo account.

Change Password form with fields for Username (User1), Password, and Confirm Password. An UPDATE button is at the bottom.

Click on Change Password to update the password from within MyCardInfo.

Select Your Security Code form with fields for Security Code and Confirm Security Code. An UPDATE button is at the bottom.

Click on Select Your Security Code to update the Security Code from within MyCardInfo. The Security Code is a four-digit number the user must provide when signing into MyCardInfo on an unauthorized computer.

Authorize computer form with the question: 'Is this computer a trusted computer that you would like to authorize for future use with this account?'. Two buttons: AUTHORIZE and DO NOT AUTHORIZE.

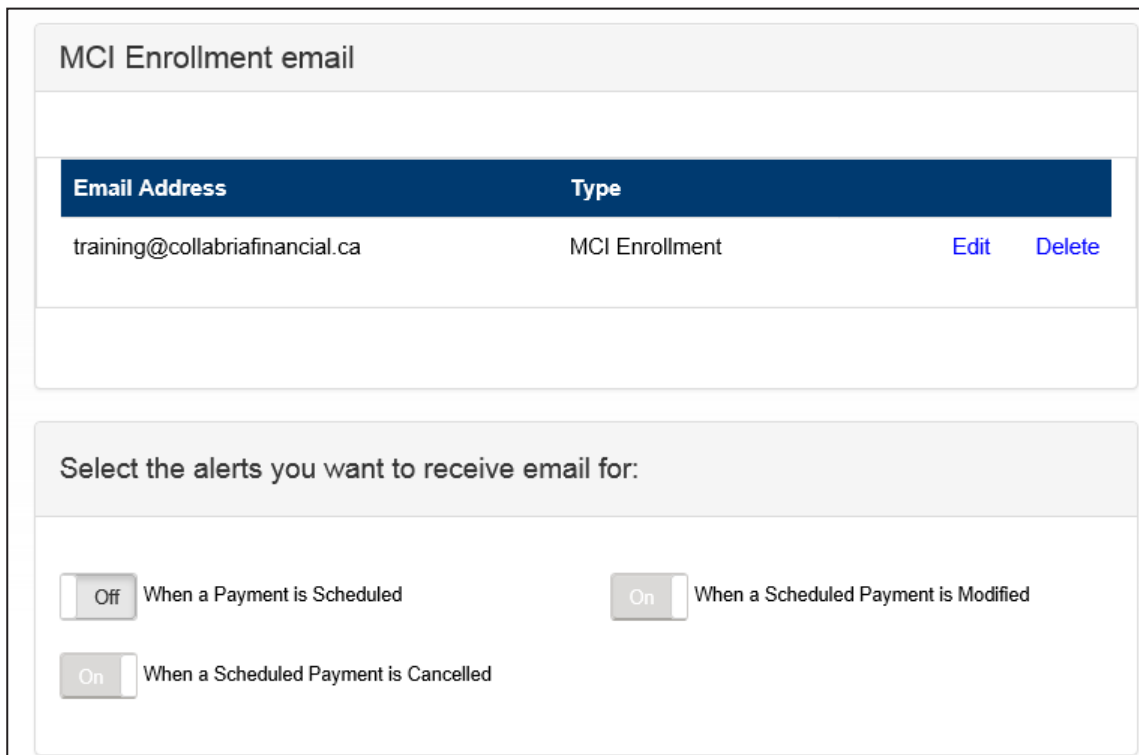
Click on Authorize computer to designate the current computer on which the user is signed into MyCardInfo as a trusted computer.

## SECURITY ALERTS

The Company User may opt in/opt out to receive various security alerts via email. Select “Security Alerts” from the “Account Info” tab at the top of the screen.



### Screen Response:



1. Activated SecurityAlerts will be sent to same email address to which the Company User account is enrolled.
2. Select “Edit” to update Company User email address.
3. Select the alerts the Company user wants to receive via email

#### Options:

- a. When Payment is Scheduled
- b. When a Scheduled Payment is Cancelled
- c. When a Scheduled Payment is Modified

## MAKE A PAYMENT

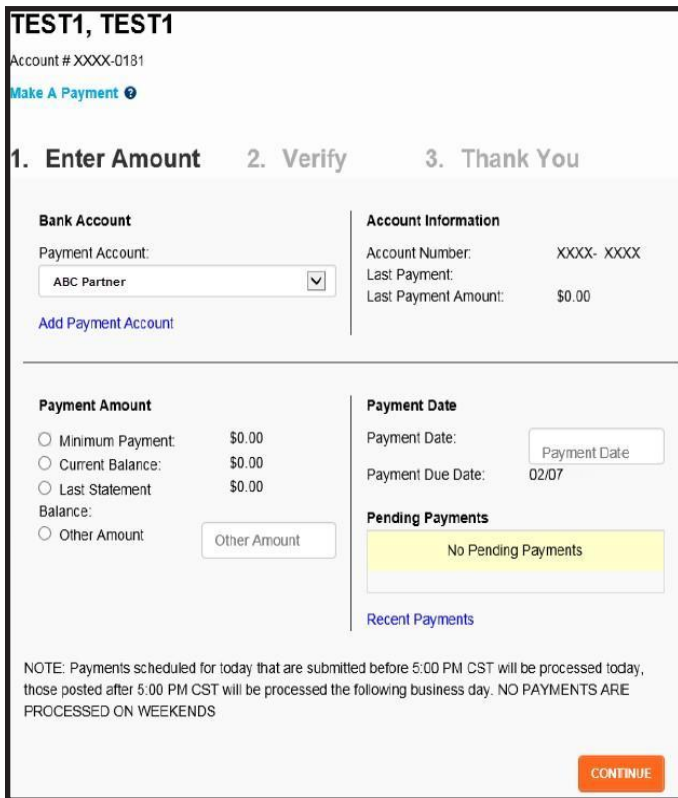
Make a Payment allows a cardholder to make a credit card payment online with a one time payment. Benefits to the cardholder include being able to make a payment from any financial institution.

1. To access the Make a Payment screen, hover over the Payments tab.



2. Select the “Make a Payment” option from the drop down menu.

### Screen Response:



**Note:** An account previously entered for payment will display if a payment has been made using an online payment method.

## Add/Edit Payment Account

**Note:** To make a payment, the user must first establish a Payment Account to be used for payment withdrawal. There is no limit to the number of accounts the user can enter. To add a new payment account, select the “Add Payment Account” hyperlink.

### Screen Example:

The user may choose to add a payment account or edit an existing one.

- I. To edit an existing payment account, click on “Edit”.

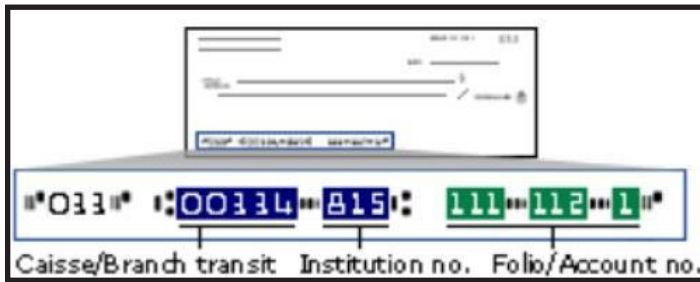
**Available Payment Accounts**

Below are the Payment accounts you have made available to make payments from. If you need to make changes to an account, click **Edit** on the account line. If you would like to delete an account, click on **Delete**. To add additional accounts click **Add Payment Account**.

ACCOUNT NICKNAME	INSTITUTION NAME	ACCOUNT TYPE	ACCOUNT NUMBER	ROUTING NUMBER	STATUS	
ABC	ABC Credit	Chequing	xxxxx6789	xxxxx809	Default	<a href="#">Edit</a> <a href="#">Delete</a>

[Add Payment Account](#)

## MyCardInfo Consolidated Account Setup: Company User



To set up a payment account:

1. Enter an Account Nickname.
2. Select Chequing or Savings from the drop down menu.
3. Enter the account number.

**Note:** The appropriate Account Number is located at the bottom of a cheque or routing slip for the desired account. The account number is highlighted green in the image above. When entering the Account Number, enter all the digits. Example: 111121. Account Numbers must be at least 7 digits long. Do not include any spaces/dashes or letters. If the check sample has a 45 on the right, do not include it.

4. Enter the routing number.

**Note:** The appropriate Routing Transit Number is at the bottom of a cheque or routing slip for the desired account. The Routing Transit Number is highlighted blue in the image above. When entering the Routing Transit Number, please enter only the Caisse/Branch transit followed by the Institution number. The Caisse/Branch number is 5 digits, the Institution number is 3 digits. Example: 00334815.

5. Click "Submit".


## MyCardInfo Consolidated Account Setup: Company User

### Screen Response:

**Enter Payment Account Information**

Account Nickname:

Account Type:



**Note: When entering Branch and Financial Institution number, please enter only the Caisse/Branch transit followed by the Institution number. Ex: 00334815**

**When entering the Account Number, enter all the digits. Ex: 11111121**

Routing Number:

Account Number:

Make Default:

**Note:** If Make Default is checked, that account will be the first to appear in the payment drop down menu.

## Make a Payment

The Make a Payment screen will display.

Screen Response:

Default - XXXX-0012 - Default ▾
[Add Another Account](#)

[Make A Payment](#)

**1. Enter Amount**
2. Verify
3. Thank You

---

**Bank Account**

Payment Account:

ABC Partner ▾

[Add Payment Account](#)

**Account Information**

Account Number: XXXX- XXXX

Last Payment: 1/28

Last Payment Amount: \$200.00

---

**Payment Amount**

Minimum Payment: \$99.00

Current Balance: \$2,477.09

Last Statement Balance: \$2,477.09

Other Amount

**Payment Date**

Payment Date:

Payment Due Date: 04/12

**Pending Payments**

No Pending Payments

[Recent Payments](#)

NOTE: Payments scheduled for today that are submitted before 5:00 PM CST will be processed today, those posted after 5:00 PM CST will be processed the following business day. NO PAYMENTS ARE PROCESSED ON WEEKENDS

CONTINUE

To make a one time payment:

1. Using the drop down menu, select the account from which the payment will be taken.
2. Input the payment amount.
3. Enter the effective date of the payment.
4. Click "Continue."



Screen Response:

1. Enter Amount	2. Verify	3. Thank You
<b>Bank Account</b>		<b>Account Information</b>
Payment Account:	xxxxx	Account Number: XXXX
Payment Account Description:	Chequing	
Routing Number:	xxxxx	
Financial Institution:	ABC Partner	
<b>Payment Amount</b>		<b>Payment Date</b>
Payment Amount:	\$99.00	Payment Date: 4/8
Total Payment Amount:	\$99.00	Payment Processing Date: 4/8
		<b>CONFIRM</b> <b>CANCEL</b>

5. Verify information and click "Confirm."

Screen Response:

1. Enter Amount	2. Verify	3. Thank You
<b>Thank you! Your payment has been scheduled.</b> <span>✕</span> Confirmation Number: <u>4100313</u>		
<b>Bank Account</b>		<b>Account Information</b>
Financial Institution:	ABC Partner	Account Number: XXXX
Payment Account:	XXXXX	
Payment Routing Transit:	XXXX	
<b>Payment Amount</b>		<b>Payment Date</b>
Payment Amount:	\$99.00	Payment Date: 4/8
		Payment Processing Date: 4/8
<a href="#">Return to Payments</a>		

## Payment Guidelines

1. Only one payment per day is allowed through Springboard Make Payment and/or MyCardInfo. If a payment is scheduled in MyCardInfo, the user cannot schedule another payment until the prior payment has processed.
2. The daily payment processing deadline is 5:00 PM - CST.
3. Payments will be posted within two business days.
4. MyCardInfo will not allow a credit balance.
5. Payments may come from a chequing or savings account at a financial institution. MyCardInfo will not accept payments from another credit card.
6. The primary cardholder can add a joint cardholder. If the joint cardholder wishes to make a payment, they must setup the payment in a separate MyCardInfo account.
7. Both MyCardInfo users can schedule a payment on an account, however, only one payment may be scheduled daily.
8. Payments may be cancelled within the MyCardInfo account they were submitted until the day the payment is processed.

**Note:** *Payments scheduled before 5 PM - CST are processed same business day. This means that payment is received overnight and posted to the account the next business day, therefore releasing the equivalent amount back into the company available credit. However, the payment reflects as "paid" on the date it was scheduled.*

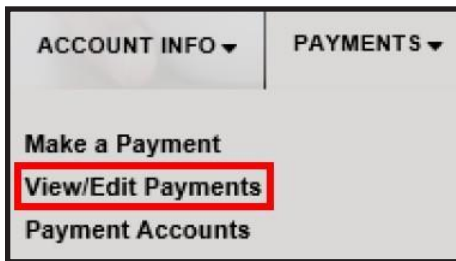
*Payments scheduled after 5 PM - CST are processed next business day. The payment reflects as "paid" on the date after it was scheduled (because it was scheduled after end of business day). The payment is received and posted to the account next business day, therefore releasing the equivalent amount back into the company available credit. This means that it could take up to two business days for the payment to post to the account in this example.*

*Payments are not processed on weekends or holidays (Canada and USA). For example, if a payment is made Friday after 5 PM - CST on a holiday weekend, the payment will be processed the following Tuesday and post to the account the following Wednesday. It is not processed on Friday, because it is scheduled after the end of the business day. Therefore, it processes the next business day which is Tuesday, since it is a three day weekend and posts to the account next business day - Wednesday.*

## VIEW AND EDIT PAYMENTS

View/Edit Payments allows the user to view, edit or cancel their payment history for all payments processed through Springboard or MyCardInfo.

To access the View/Edit Payments screen, hover over the Payments tab and select View/Edit Payments from the drop down menu.



### Screen Response:

**Payment Activity** ⓘ

**Note:** This screen will only show payments made on this site and some in-branch payments. If you would like to validate any payment, it is best to view them on the [Account Transactions](#) screen.

<b>Status</b>	<b>Definition</b>
<b>Scheduled</b>	Payment will be received on the date shown.
<b>In Process</b>	Payment is being processed and will be received on the date shown. This payment cannot be Edited or Canceled.
<b>Processed</b>	Payment was successfully processed on the date shown.
<b>Canceled</b>	This payment was Canceled. It will not be processed.

STATUS	PROCESSING DATE	PAYMENT AMOUNT	PAYMENT TYPE	PAYMENT ACCOUNT	CONFIRMATION #	
Scheduled	11/4	11/4	\$40.00	Online	xxxxxx5887	43766936 <a href="#">Edit</a> <a href="#">Delete</a>
Canceled	10/19	10/19	\$1.00	Customer Service	xxxxxxxx7715	S15101906P
Canceled	10/12	10/13	\$1.00	Customer Service	xxxxxxxx7715	S15101205J
Processed	10/9	10/9	\$30.00	Online	xxxxxxxx7715	43676882

## Edit a Scheduled Payment

1. Select the Edit link to the right of the payment.

Screen Response:

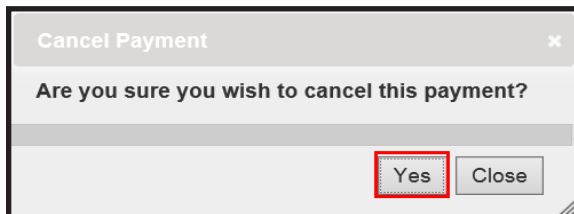
STATUS	PROCESSING DATE	PAYMENT AMOUNT	PAYMENT TYPE	PAYMENT ACCOUNT	CONFIRMATION #	
Scheduled	11/5	11/5	\$1.00	Online Service	xxxxxx5887	43770235 <a href="#">Edit</a> <a href="#">Delete</a>

2. Enter correct dollar amount.
3. Click "Update".

## Cancel a Payment

1. Select the "Delete" link to the right of the payment.

Screen Response:

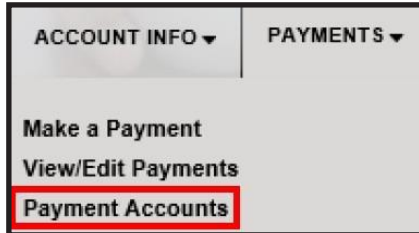


**Note:** Only scheduled payments can be cancelled/edited. If the payment status is noted as "In Progress" or "Processed" the payment may not be edited/cancelled. Financial institutions can cancel payments in Springboard.

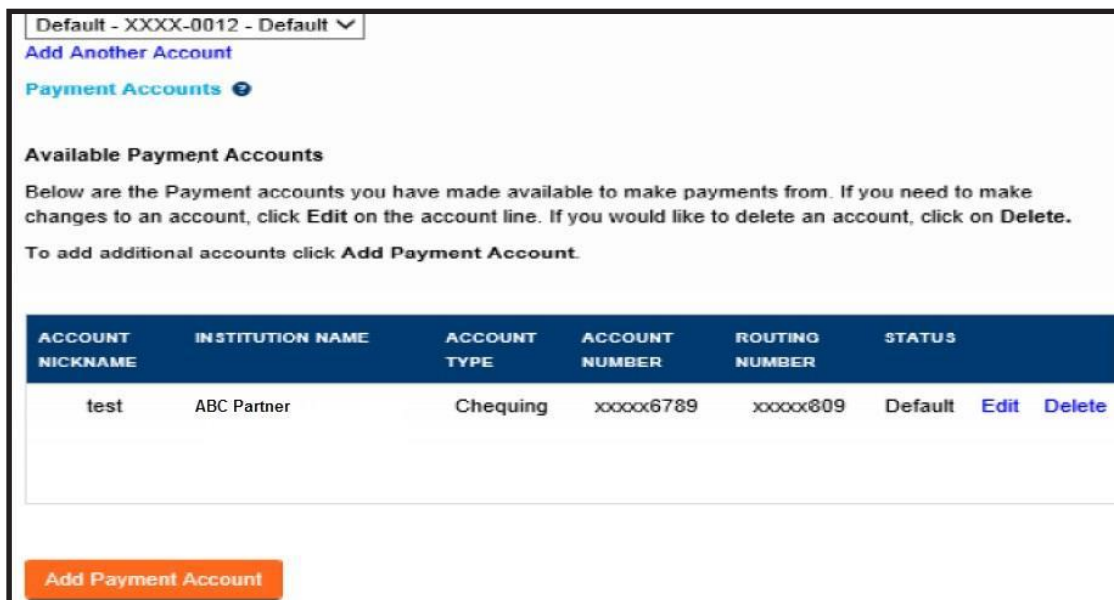
## PAYMENT ACCOUNTS

Payment Accounts allows users to add, edit or delete checking and savings accounts within MyCardInfo.

To access the Payment Accounts screen, hover over the Payments tab and select Payment Accounts from the drop down menu.



### Screen Response:



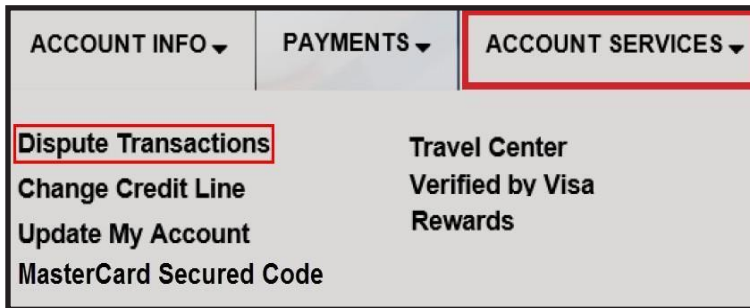
1. Select the Edit or Delete links or the **Add Payment Account** button to make changes.

**Note:** See Make a Payment section for more details on how to add or edit a payment account.

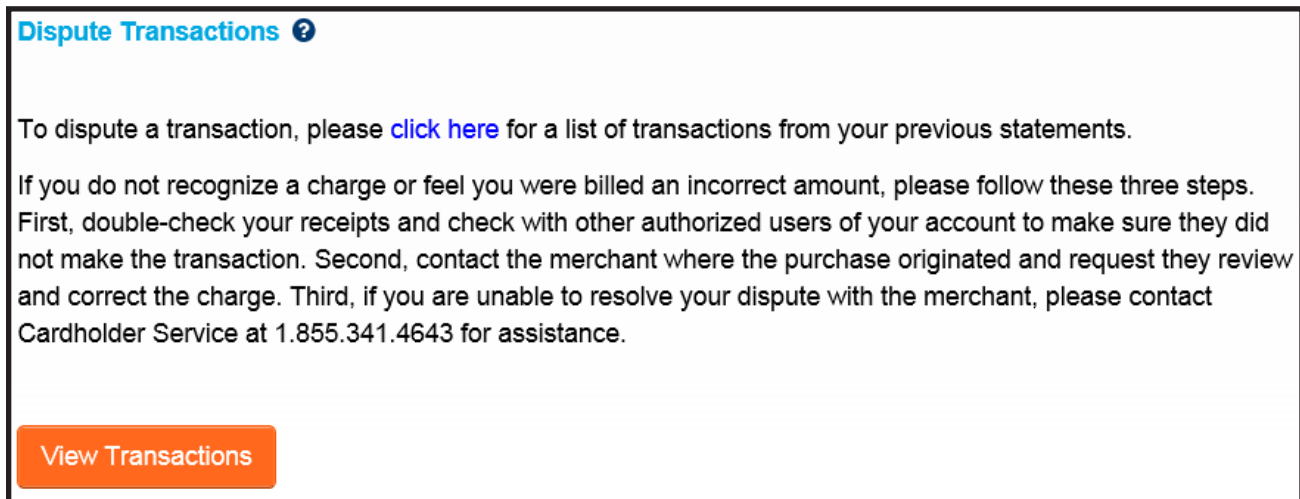
## DISPUTE TRANSACTIONS

This option allows users to dispute a transaction online. Account holders are required to attempt to resolve a dispute directly with the merchant prior to submitting the request through MyCardInfo. Users are required to call the number on the back of their card to report fraudulent transactions.

To access the Dispute Transactions hover over the Account Services tab select the “Dispute Transactions”.

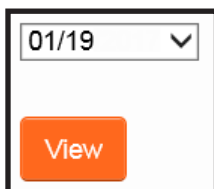


Screen Response:



1. Click on .

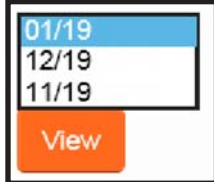
Screen Response:



## MyCardInfo Consolidated Account Setup: Company User

2. Click on the Recent Transaction drop down.

Screen Response:



3. Click on the correct statement date and click "View".

Screen Response:



A screenshot of a "Transaction Summary" table. The table has four columns: TRANSACTION DATE, POST DATE, TRANSACTION DESCRIPTION, and TRANSACTION AMOUNT. There are three rows of transactions, each with a checkbox in the first column.

TRANSACTION DATE	POST DATE	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT
<input type="checkbox"/> 8/5	8/6	SAKURA SUSHI	\$85.66
<input type="checkbox"/> 8/7	8/9	STARBUCKS	\$3.98
<input type="checkbox"/> 8/7	8/9	NOODLES & CO	\$11.43

4. Check the box next to the transaction being disputed.

5. Click  .



Screen Response:

### Dispute History

Post Date	Dispute Date	Description	Amount	Reason for Dispute	Status
8/6	11/9	SAKURA SUSHI	\$65.66	Select Reason ▼	Incomplete 

Contact Phone \*

Email Address \*

6. Access the Select Reason drop down menu.

Screen Response:

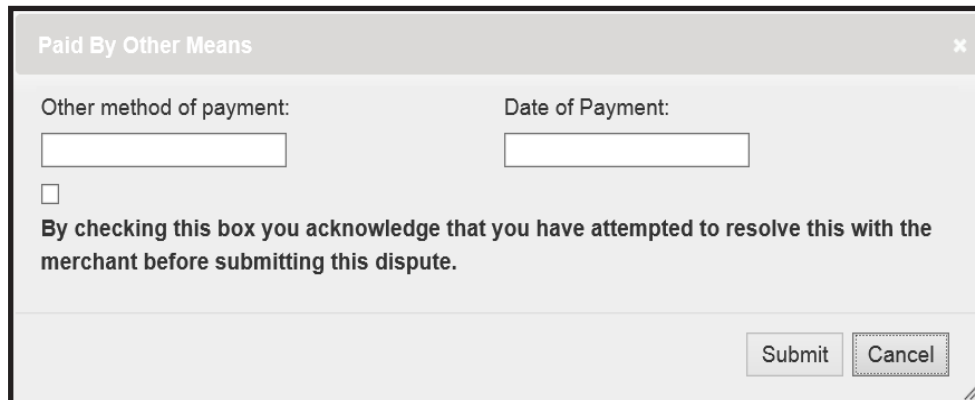
Select Reason

- Double Billing
- Credit Not Received
- Merchandise/ Service Not Received
- Damaged/Defective Merchandise
- Cancelled Reservation
- Returned Merchandise
- Cancelled Services
- Invalid Amount
- Paid by Other Means
- Fraud
- Other
- Remove from List

7. Click on the reason for the dispute.

## MyCardInfo Consolidated Account Setup: Company User

### Example Screen Response:



Paid By Other Means

Other method of payment:

Date of Payment:

**By checking this box you acknowledge that you have attempted to resolve this with the merchant before submitting this dispute.**

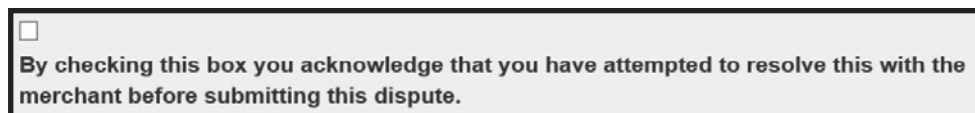
Submit Cancel

8. Complete the details page.

**Note:** *The details page will change depending on the dispute reason selected.*

9. Click the checkbox to acknowledge that attempts were previously made to resolve the dispute directly with the merchant.

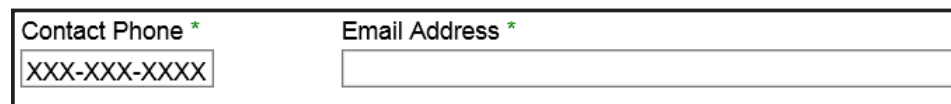
### Screen Response:



**By checking this box you acknowledge that you have attempted to resolve this with the merchant before submitting this dispute.**

10. Click .

11. Enter Contact Phone and Email Address.



Contact Phone \*

Email Address \*


12. Click "Submit Disputes".

### Screen Response:

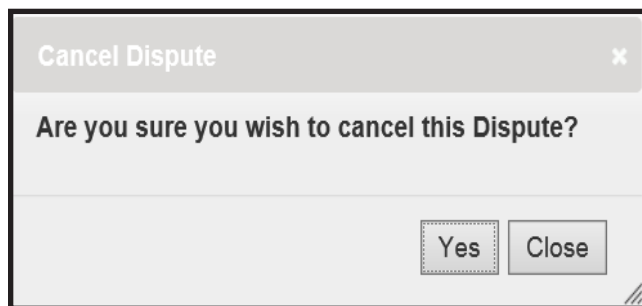
**Thank you for your response. An email has been sent to the appropriate team for your inquiry to be processed.**

## Canceling a Transaction Dispute

To cancel a transaction dispute before final submission of information:

1. Click on the  button.

Screen Response:



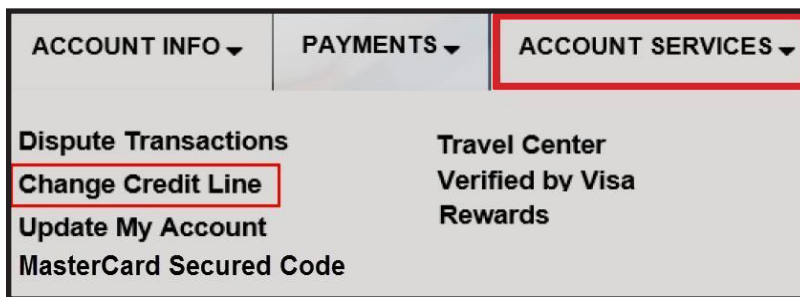
2. Click  .

**Note:** To cancel a disputed transaction after it has been submitted, contact [Risk\\_Email@tmg.global](mailto:Risk_Email@tmg.global).

## CHANGE CREDIT LINES

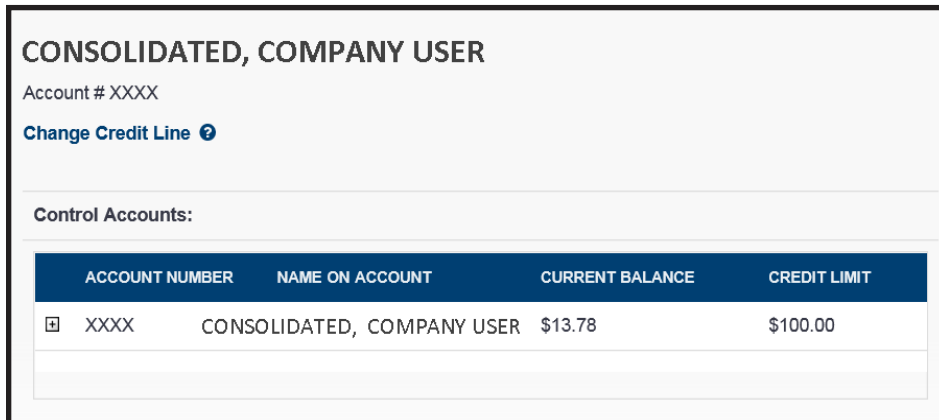
This option enables the Company User of a consolidated business account to adjust credit lines for each cardholder within the aggregate company credit line of business account. All cardholder credit lines will default to the aggregate credit line for the company as a whole. The Company User is responsible for adjusting each cardholder's credit line to distribute the aggregate company credit line across all employee cards.

To change credit lines, hover over the Account Services tab.



The screenshot shows a navigation menu with three tabs: ACCOUNT INFO, PAYMENTS, and ACCOUNT SERVICES. The ACCOUNT SERVICES tab is selected and highlighted with a red border. Below the tabs, the menu items are: Dispute Transactions, Change Credit Line (highlighted with a red box), Update My Account, MasterCard Secured Code, Travel Center, Verified by Visa, and Rewards.

Screen Response:

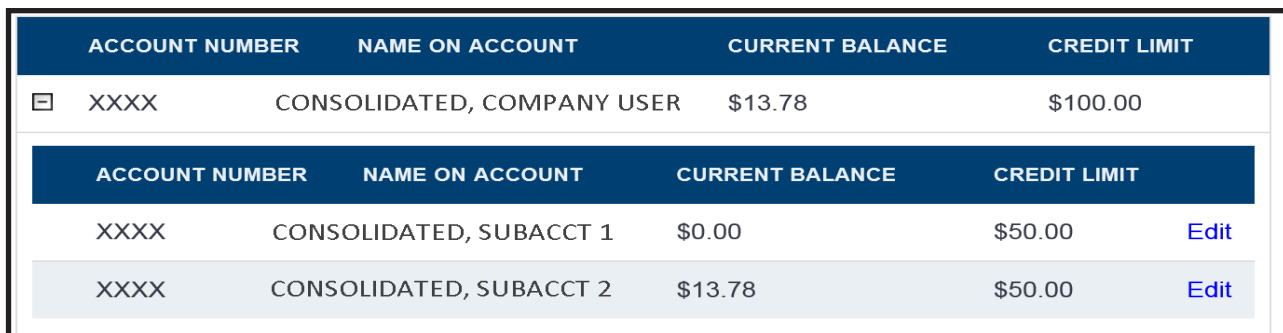


The screenshot shows the 'CONSOLIDATED, COMPANY USER' page. It includes the account number 'XXXX' and a 'Change Credit Line' link. Below this is a section for 'Control Accounts' with a table:

ACCOUNT NUMBER	NAME ON ACCOUNT	CURRENT BALANCE	CREDIT LIMIT
<input type="checkbox"/> XXXX	CONSOLIDATED, COMPANY USER	\$13.78	\$100.00

1. Click the  button to expand the subaccounts in the company.

Screen Response:



The screenshot shows the expanded 'Control Accounts' table with three rows:

ACCOUNT NUMBER	NAME ON ACCOUNT	CURRENT BALANCE	CREDIT LIMIT
<input type="checkbox"/> XXXX	CONSOLIDATED, COMPANY USER	\$13.78	\$100.00
XXXX	CONSOLIDATED, SUBACCT 1	\$0.00	\$50.00 <a href="#">Edit</a>
XXXX	CONSOLIDATED, SUBACCT 2	\$13.78	\$50.00 <a href="#">Edit</a>



MyCardInfo  
Consolidated Account Setup: Company User

1. To adjust the credit limit for a subaccount, click on [Edit](#) .

Screen Response:

ACCOUNT NUMBER	NAME ON ACCOUNT	CURRENT BALANCE	CREDIT LIMIT
<input type="checkbox"/> XXXX	CONSOLIDATED, COMPANY USER	\$13.78	\$100.00
ACCOUNT NUMBER	NAME ON ACCOUNT	CURRENT BALANCE	CREDIT LIMIT
XXXX	CONSOLIDATED, SUBACCT 1	\$0.00	<input type="text" value="50"/> <a href="#">Update</a> <a href="#">Cancel</a>
XXXX	CONSOLIDATED, SUBACCT 2	\$13.78	\$50.00 <a href="#">Edit</a>

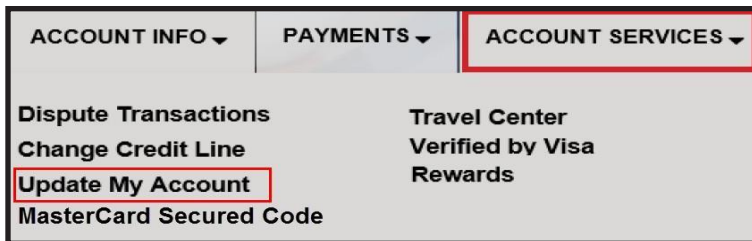
2. Enter desired credit line in the box and click “Update.”

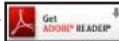
**Note:** All subaccount credit lines will default to the maximum aggregate credit line for the company, unless otherwise adjusted in MyCardInfo by the Company User.

## UPDATE MY ACCOUNT

This option allows the Company User to download the forms required to process changes to the business account. Simply, download and print the form. Updated mailing addresses can be found on the Contact Us page.

To access the Update My Account screen, hover over the Account Services tab and select the Update My Account link from the drop-down menu.



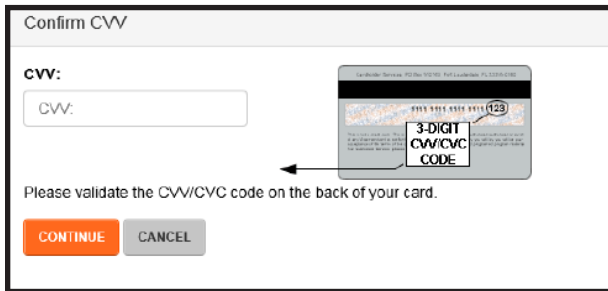
**Note:** All forms can be filled out using Adobe® Reader®. Click  at the bottom of the page to download this program.

MyCardInfo  
 Consolidated Account Setup: Company User  
**TRAVEL CENTER**

This option allows the user to place a travel status on their account. This notifies Collabria of travel plans, allowing travel purchases to be processed without interruption.

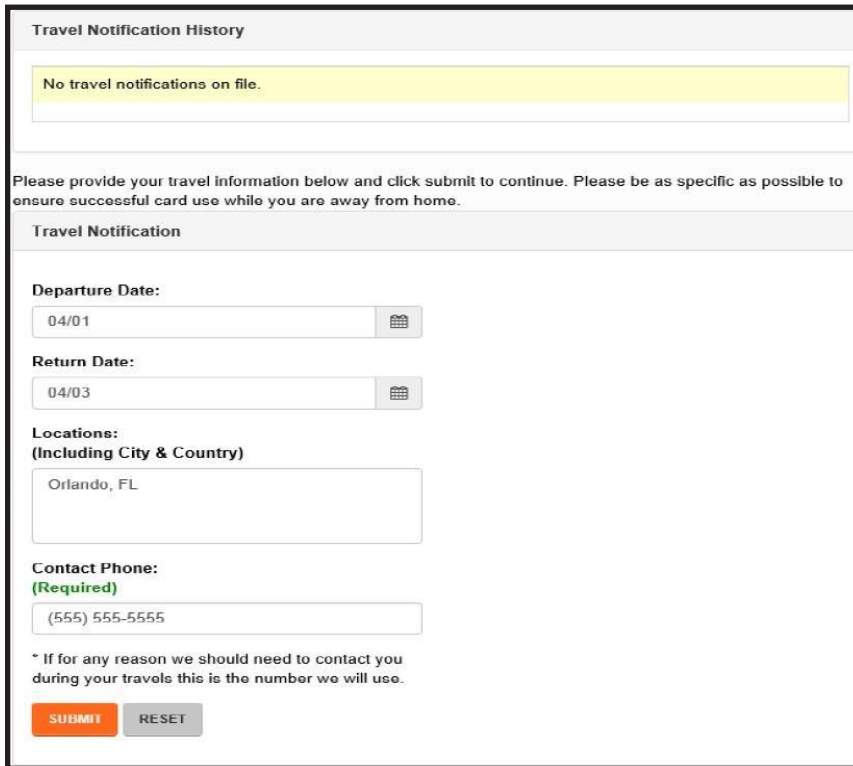
To access the Travel Center screen, hover over the Account Services tab and select the “Travel Center” link from the drop down menu.

Screen Response:



1. Enter the CVV/CVC code on the back of the credit card to gain access the TravelCenter.

Screen Response:



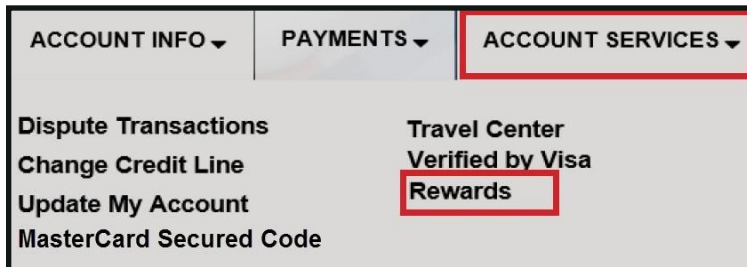
Input the following:

- a. Departure date
- b. Return date
- c. Locations (including city and country)
- d. Contact phone number

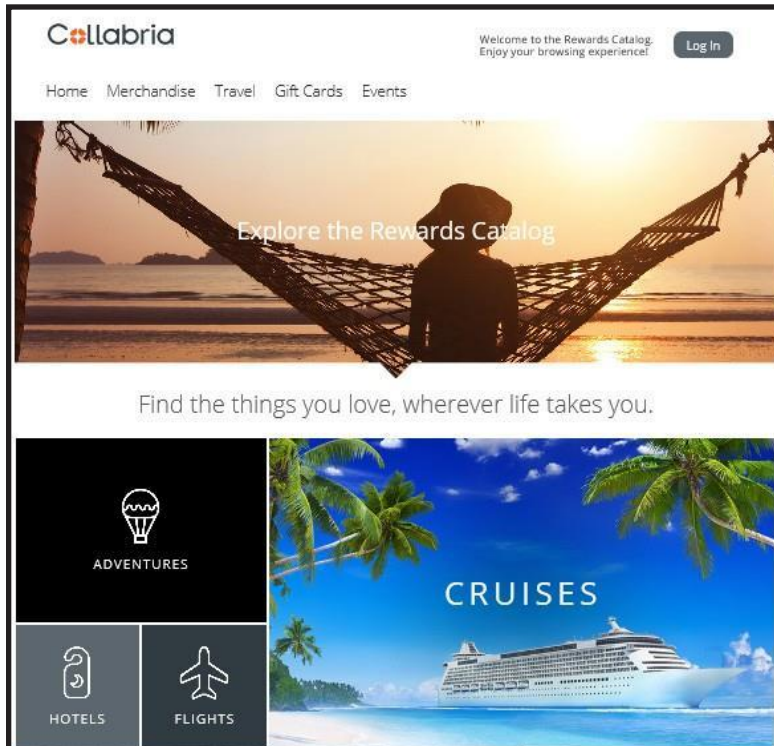
2. Click “Submit” at the bottom of the page.

## REWARDS

The rewards point total can also be viewed on the right side of the Account Activity page. Rewards a consolidated business account will be applied at the company level. Company Users can access the Collabria Rewards site by clicking the “Rewards” option from the “Account Services” menu.



### Screen Response:

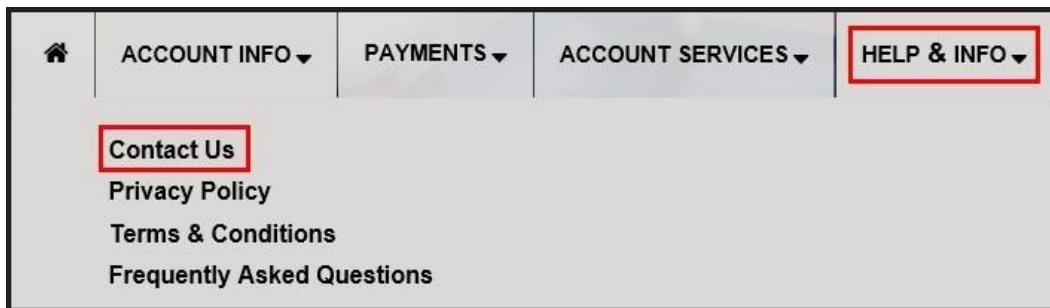




## CONTACT US

This option provides the user with the appropriate contact information for Collabria resources supporting Collabria partner card programs.

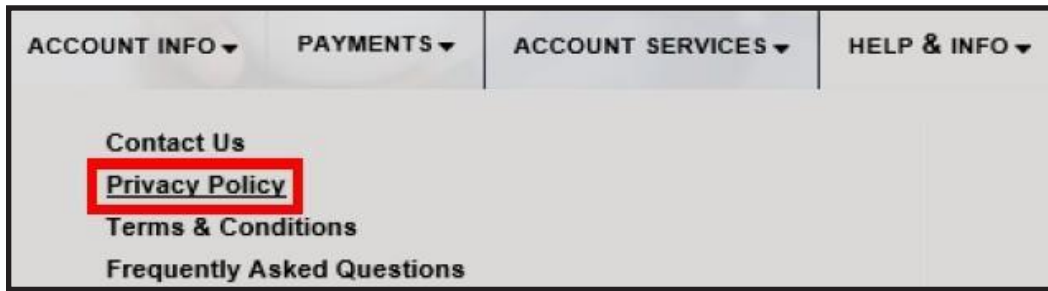
To access the Contact Us screen, hover over the Help & Info tab. Then click on “Contact Us”.



**Note:** The Contact Us page displays updated phone numbers, email addresses, Dispute a Transaction contact information and Fraud Department contact information.

## PRIVACY POLICY

To access the Privacy Policy screen, hover over the Help & Info tab and select Terms & Conditions from the drop-down menu.



Screen Response (Sample Only):

### Internet Privacy Policy for Collabria

**1. Accountability**

At Collabria, we ensure your confidentiality by protecting the personal, business and financial information entrusted to us. Committing to protect your confidential information is fundamental to the way we do business and is reflected in our privacy policies and procedures. Each and every one of our employees is responsible for respecting and protecting the personal information to which the employee or its agent has access.

A copy of the Collabria Privacy policy is available by calling 1-855-341-4643 or visiting [collabriafinancial.ca](http://collabriafinancial.ca) where a copy of the privacy policy is available for view or print.

This policy is developed in compliance with the privacy and personal information protection statute that is applicable in your province. These statutes set out rules for how organizations such as ours can collect, use and disclose your "personal information". For the purposes of this privacy policy, "personal information" means information about an identifiable individual, as further defined under applicable laws provincial and federal privacy statutes.

**2. Why We Ask For Your Information**

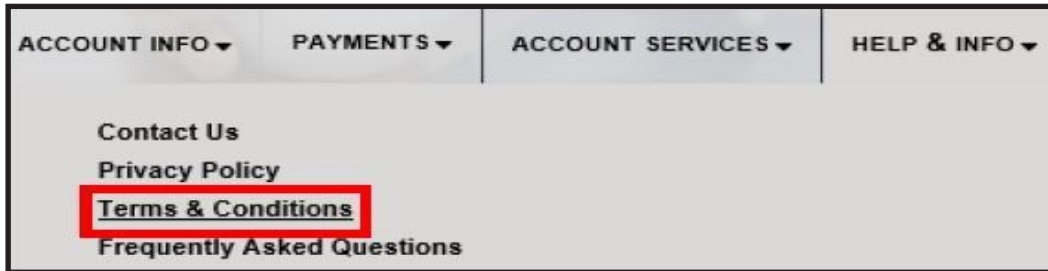
In order to provide service to you, we will collect information from you, including personal information.

We request information from you, including personal information, to complete your credit card application request and to establish and serve you as our customer. When you apply for a new product or service we will indicate in the application agreement

## TERMS OF USE

Users can access the Terms of Use for MyCardInfo.

To access the Terms of Use screen, hover over the Help & Info tab and select Terms or Use from the drop down menu.



Screen Response (Sample Only):

All services and information made available to users by Collabria Financial Services Inc. ("Collabria") on the following Collabria Websites are covered by these Terms of Use, unless otherwise provided in additional terms of use specific to certain services offered through such Websites:

- collabriefinancial.ca
- collabriefcreditcards.ca

**Terms AND Conditions**

Please read these terms and conditions carefully.

By enrolling for, accessing and using the Collabria Websites and any pages contained in the Collabria Websites, you agree to be bound by the terms and conditions below. If you do not agree with the terms and conditions below, do not enroll for, access or use the Collabria Websites, or any pages contained in the Collabria Websites.

As a user of the Collabria Websites, you have to make sure you review the terms and conditions applying specifically to certain services provided on the Collabria Websites as they may contain variations to what is provided in these Terms of Use and create additional obligations for you.

**DESCRIPTION OF SERVICES**

Collabria currently provides users with a wide selection of online services through the Collabria Websites (hereinafter collectively referred to as the "Service" or the "Services") to which these Terms of Use apply.

Unless otherwise specified, any new feature that enhances or augments one or more existing Services, or any new Service launched by Collabria, will be subject to these Terms of Use.

You alone are responsible for paying the costs associated with the use of the Service, such as Internet connection charges or fees charged for connecting to networks that provide access to Internet content. As well, you are responsible for acquiring any equipment needed for such connections.

**IDENTIFICATION AND PASSWORD**

You are not required to identify yourself when making use of the Services, except when such identifying information is required to access the Collabria Websites' transactional tools or credit card application forms.

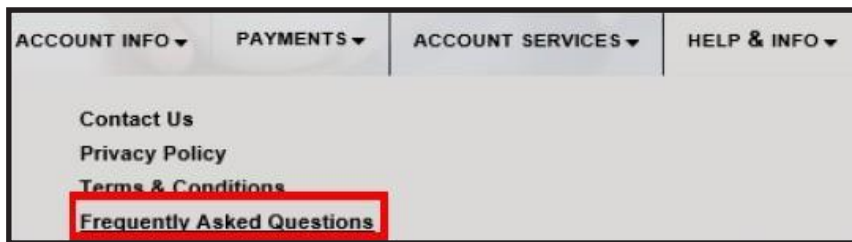
The personal information we collect from you on our online credit card application depends on the product or service you requested, and is collected by Collabria in order to make a credit decision. We are also required by law to obtain, verify and record information that identifies each person who opens an account. Because of these requirements, we may ask you to provide any of the following:

- Personal information that will be used to identify and validate your identity;
- Employment information;
- Income; and
- Any other financial information that may be required to perform the credit adjudication process.

## FREQUENTLY ASKED QUESTIONS

Frequently Asked Questions provides access to commonly asked questions about the MyCardInfo website.

To access the Frequently Asked Questions, hover over the Help & Info tab and select Frequently Asked Questions link from the drop down menu.



Screen Response (Sample Only):

**What is MyCardInfo?** MyCardInfo is Collabria's online account management tool where you can access account information 24/7. You can register for a MyCardInfo account for free as a Collabria cardholder. With MyCardInfo, you can check current balances, review recent activities, verify the last payment made, make payments, view eStatements and more.

**How do I enroll?** For personal cards, enrolling is as simple as entering your account information, assigning a username, password and personal security code and completing a few security questions. You will then have access to your online account. To enroll, click the "Home" link at the bottom of the page and you'll be redirected to our enroll/login page. Click "Enroll" to get started.

**What if my Username or Password does not work?** If you encounter any questions or concerns that are not answered by the online instructions during your enrollment or login process, call Cardholder Service at 1.855.341.4643 for assistance.

**Is MyCardInfo safe?** MyCardInfo is designed to keep your account information secure. Your session will time out after 20 minutes of inactivity and your account number is never displayed on the screen. If you have any questions please call Cardholder Service at 1.855.341.4643 for assistance.

MyCardInfo

Consolidated Account Setup: Company User

## CONTACT INFORMATION

For additional assistance, please send inquiries to one of the contact methods listed below:

### Partner Support

**Email Address:** [partnersupport@collabriafinancial.ca](mailto:partnersupport@collabriafinancial.ca)