

# eZCard

**USER GUIDE** 

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**Treasury Management Support | 800-844-1720** 

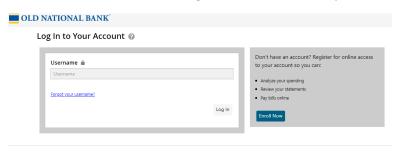
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# **Enrollment**

Cardholders can self-enroll on the eZCardInfo website, <a href="https://www.ezcardinfo.com">https://www.ezcardinfo.com</a>, or the Company's Card Program Administrators can enroll cardholders at the time of ordering the cardholder's credit card.

1. Select Enroll Now to begin the self-enrollment process.



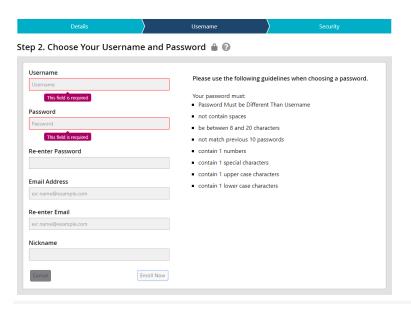
2. Enter credit card information, then select Begin Enrollment



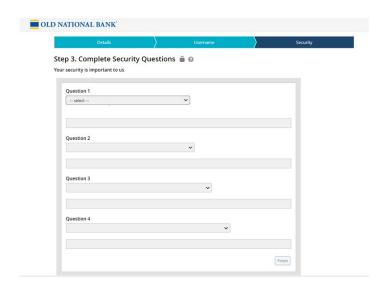
3. Enter name as it appears on the card, card expiration date and select Next.



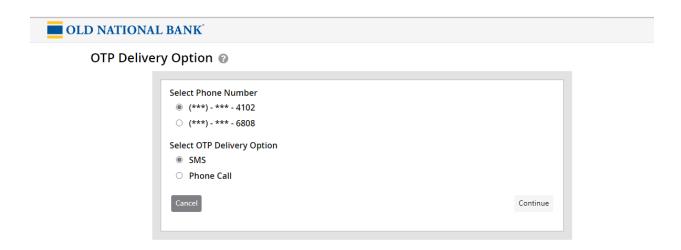
4. Enter username, password and complete the rest of the form as instructed, then select Enroll Now.



5. Complete Security questions and answers and select Finish. You will receive an email with your user credentials.



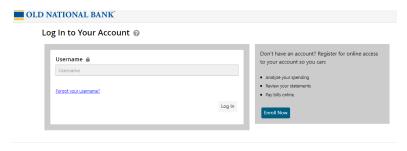
6. Select your preferred contact number and OTP delivery method. Select Continue to complete the process.



7. You will be sent an email with a confirmation code to verify your email address.

# Login

1. Enter your username, select Login.



2. Another screen appears, enter your password, and select Login.

Upon Logging in, a One Time Phone Delivery Option via SMS or Phone Call will be required.

3. Select your preferred contact number and OTP delivery method. Select Continue to complete the process.

NOTE: Existing users can use the Forgot Username or Forgot Password links on the website to reset their credentials. Cardholders will be prompted to enter their card information. Follow the steps when prompted to retrieve username or reset password. An email with the username and/or temporary password will be sent the email previously saved on the bank's system.



OTP Delivery Option ②



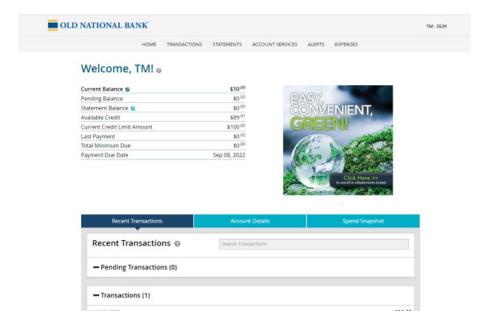
# Home Page

- 1. Upon signing in to eZCard, the top menu allows you to navigate throughout the site to:
  - View transactions.
  - View statements.
  - Make payments if enabled.
  - View and set up alerts.
  - View and change account settings.



- 2. The Homepage will also provide a quick summary of essential information including current balance, statement balance and available credit.
- 3. There are also tabs that can quickly direct you to review Recent Transactions, Account Details and Spend Snapshot.

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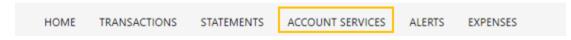


### **Account Services**

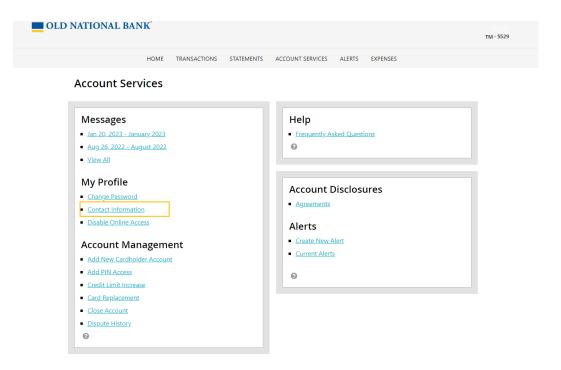
The menu item, Account Services allows you to view messages and update your account settings, including email and phone information.

#### **Update Email Address**

1. Select Account Services from menu,

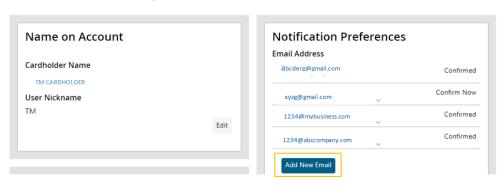


2. Under My Profile, Select Contact Information

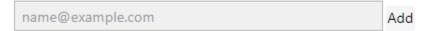


3. To add new email address, Select Add New Email.

#### Account Services > My Profile @

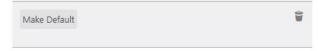


4. Enter preferred email address in the space provided, then Select Add.



5. Select the email address to verify the email address. You will receive a one-time code via the selected email address to enter in the space provided. The status beside the email that has been verified will change to "Confirmed."

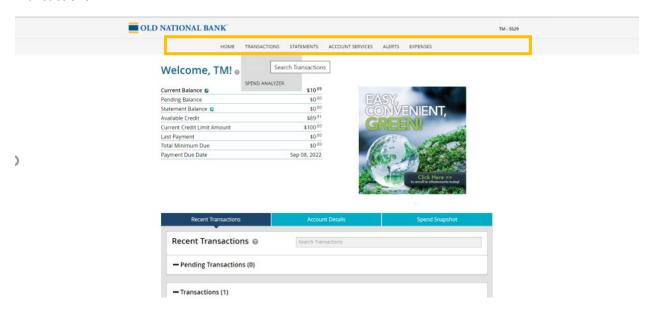
6. Select the email that has been added. Select Default to move it to the top of the list.



You have successfully updated your password.

#### Search and View Transactions

To search and view transactions, hover over transactions from the top menu and select, Search Transactions.

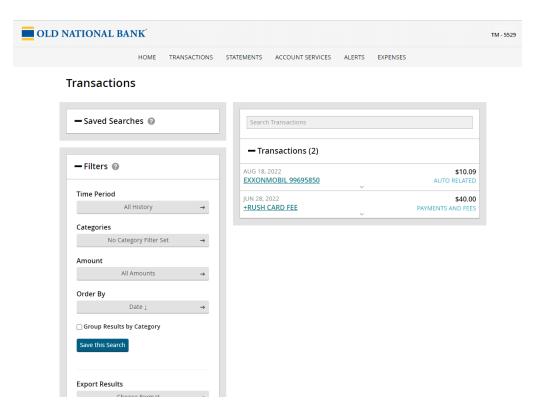


A new page appears. To the right of the screen a list of transactions will be seen. Details of transactions can be viewed by selecting the respective transactions from the list.

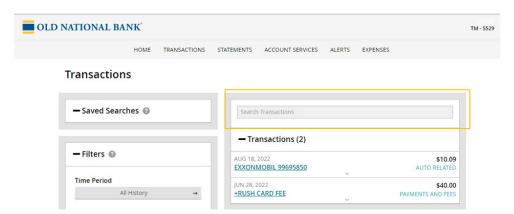
- 1. To the left of the screen, you can search for older transactions by selecting the Filter options:
  - a. Time Period,
  - b. Categories, or
  - c. Amount.

You can also order the filter. Searches can be saved for use at a later date.

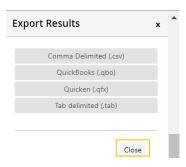
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2. You can also use the Search Transactions field using a key word. If you have forgotten the date or amount of the transaction, search using the name of the merchant.



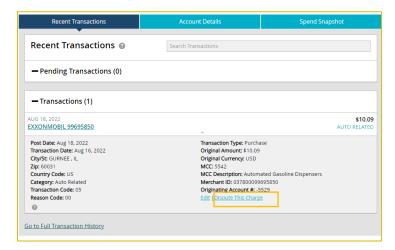
3. Transaction results can be exported into any of the formats available. Select the preferred format from Export Results and Select the Close button.



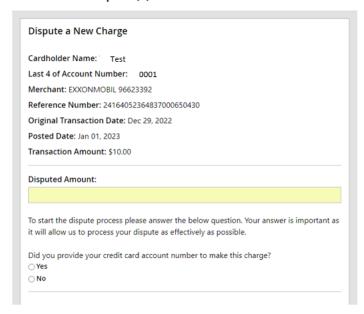
# Dispute a Charge

To initiate a dispute for transactions that are not recognized, or for a transaction with the wrong amount or for items not received,

- 1. Select the respective transaction from the list of Recent Transactions or select Search Transactions from the Transaction option.
- 2. Select "Dispute This Charge." A new form opens for you to answer questions. Complete the questions and select submit.



#### Transaction Dispute(s)



# Manage Alerts

The Alerts menu option allows you to set up and edit account alerts.

- 1. Select the Alerts option in the top menu. The Alerts page will display any alerts that have been set up for the accounts on the left.
- 2. The Add New Alert button allows you to register for Alerts. The Alerts menu is displayed from the drop-down box. Alerts will be sent to the default email address set up for alerts.

