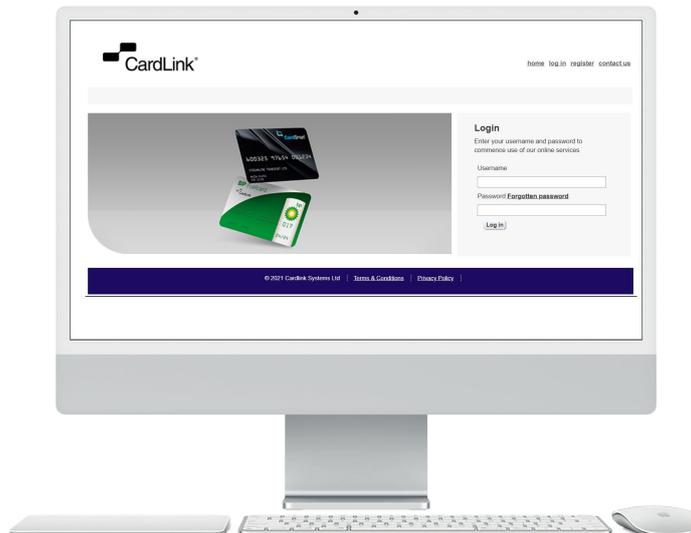


User Guide CardLink Online



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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.



[home](#) [log in](#) [register](#) [contact us](#)

Register for online access

* Required Fields

Username *	<input type="text"/>
First name *	<input type="text"/>
Last name *	<input type="text"/>
Email address *	<input type="text"/>
Account number *	<input type="text"/>



[home](#) [log in](#) [register](#) [contact us](#)



Login

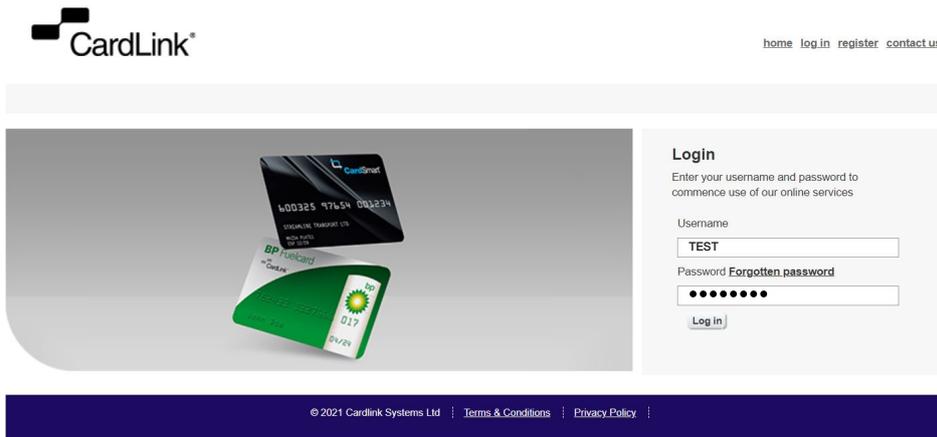
Enter your username and password to commence use of our online services

Username	<input type="text"/>
Password Forgotten password	<input type="password"/>

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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 management interface. It features a search bar with a 'Find cost centre' label and an 'Add new cost centre' button. Below the search bar is an 'Advanced search' section with 'Clear search filters' and 'Search' buttons. 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

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 management interface. The form is titled 'Account -' and has the 'Cost Centres' tab selected. The form fields are as follows:

- Cost centre number ***:
- 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](#)

At the bottom of the form, there are two buttons: [Add Cost Center](#) and [Cancel](#).

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 [Redacted] 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 [Text Input] 500
Transaction limit [Text Input] 150
Daily limit [Text Input] 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](#)

Cardholder search results

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

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

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"/>	
<input type="button" value="Transfer"/>	<input type="button" value="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

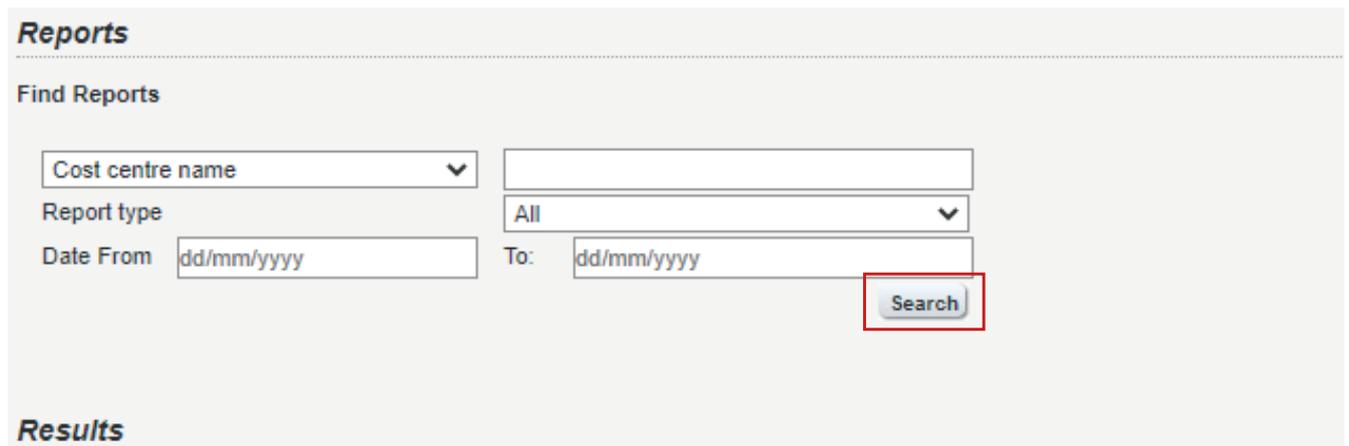
[Continue](#)

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 horizontal dashed line below it. Underneath, there 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" text input field with a placeholder "dd/mm/yyyy", and a "To:" text input field with a placeholder "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, there 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.