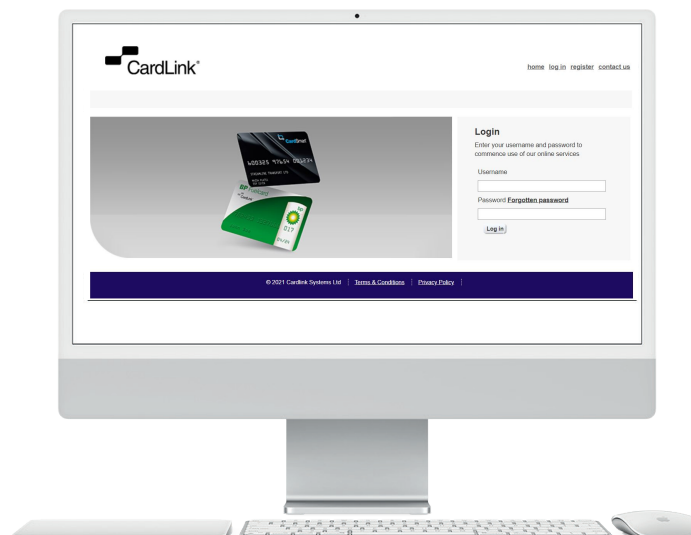


# User Guide CardLink Online



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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

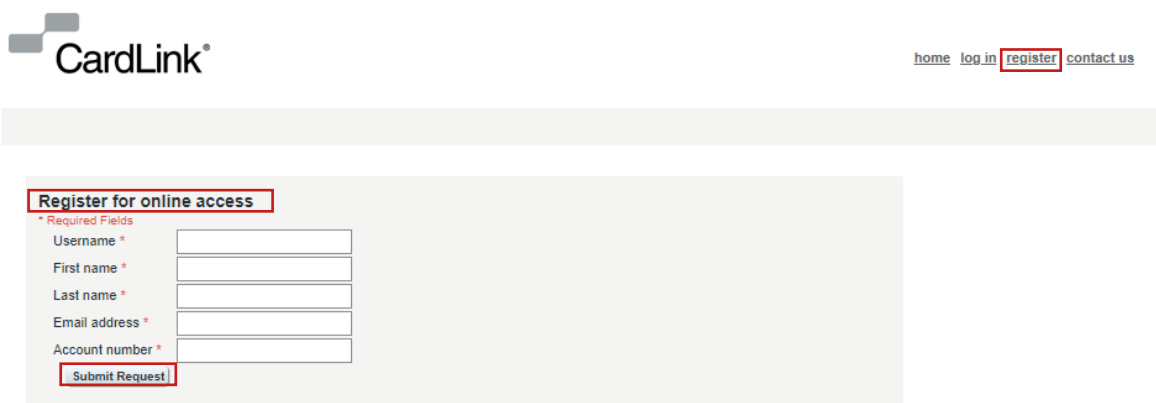
Go to <https://clo.cardlink.co.nz/>

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.

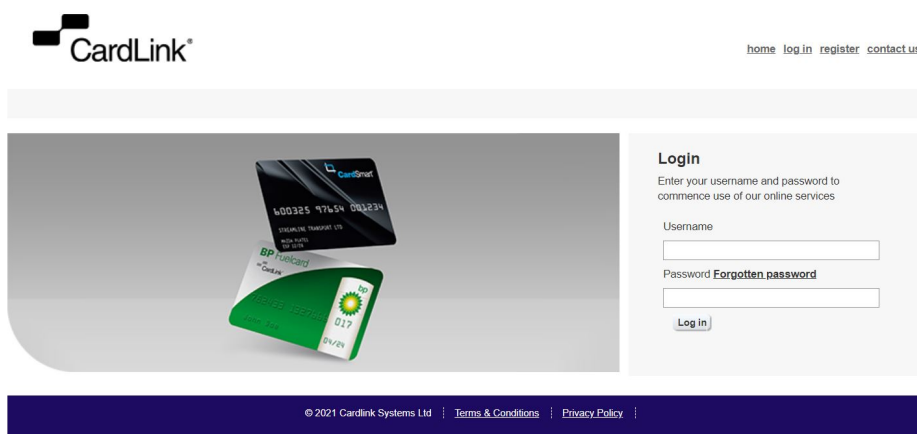
Please use Google Chrome to access CardLink Online.

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.




The screenshot shows the CardLink website header with the logo and navigation links: [home](#), [log in](#), [register](#) (highlighted with a red box), and [contact us](#). Below the header is a registration form titled "Register for online access" (also highlighted with a red box). The form includes a section for "\* Required Fields" with input boxes for Username \*, First name \*, Last name \*, Email address \*, and Account number \*. At the bottom of the form is a "Submit Request" button, also highlighted with a red box.




The screenshot shows the CardLink website header with the logo and navigation links: [home](#), [log in](#), [register](#), and [contact us](#). Below the header is a login section. On the left is an image of two cards: a black CardSmart card and a green BP Fuelcard. On the right is the "Login" form, which includes the text "Enter your username and password to commence use of our online services". The form has input boxes for Username and Password, with a "Forgotten password" link next to the password box. A "Log in" button is at the bottom of the form. The footer of the page contains copyright information: © 2021 Cardlink Systems Ltd, and links to Terms & Conditions and Privacy Policy.

If you have any questions please call our customer service team 0800 663 866 or email us on [customer@cardsmart.co.nz](mailto:customer@cardsmart.co.nz)

## 1.3 Login to: <https://clo.cardlink.co.nz/>

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



### Login

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


Username

Password [Forgotten password](#)

[Log in](#)

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Once you have successfully logged in, the below page will be displayed:



[Manage Account](#) | [Manage Merchants](#) | [Manage Users](#) | [Update My Profile](#)

### Search for accounts

Account number

Account name

Trading name

Contact name

[Search](#)

### Search for cardholder

Card number

Registration

[Search](#)

### 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)*

## 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](#)

**Search for cardholder**  
Card number   
Registration   
[Search](#)

**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 [CardSmart Terms & Conditions](#): ☐ Yes

Please select a Payment Card Type

VISA 3.00%

MasterCard 3.00%

AMERICAN EXPRESS 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
				<a href="#">Select</a>
				<a href="#">Select</a>
				<a href="#">Select</a>

|< < 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

**CardLink®**

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](#)

**Search for cardholder**  
Card number   
Registration   
[Search](#)

**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   
[Clear search filters](#) [Search](#)

**Statement search results**

Statement Date	Opening Balance	Closing Balance	Statement Amount	Payments	Actions
30/04/2021	\$181.48	\$38.38	\$38.38	-\$181.48	<div>- Select Action - - Select Action - <a href="#">Download Statement PDF</a> <a href="#">View Transactions</a></div>
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](#)

**Search for accounts**  
Account number   
Account name   
Trading name   
Contact name   
[Search](#)

**Search for cardholder**  
Card number   
Registration   
[Search](#)

**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 transactions**  
Search, view and download processed transactions  
  
Find transaction  
Invoice number  Voucher number   
Card number   
Transaction date From  To   
Processed date From  To   
  
[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	<a href="#">Details</a>

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

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Docket/Voucher number			
Invoice status	Not Invoiced		
Cost centre			
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	<a href="#">Details</a>

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

## 2.5 Cost Centres

To view, edit and create cost centres click the 'Cost Centre' tab.

### Account -

Summary

Contact Details

Statements/Invoices

Transactions

**Cost Centres**

Cards

Reports

**Cost centres**

Find cost centre

Cost centre name

Add new cost centre

Advanced search

Clear search filters

Search

**Cost centre results**

Cost centre name	Number	Status	Contact name		
<a href="#">Admin</a>	20	Issued	Kim Dean	<a href="#">View</a>	<a href="#">Edit</a>
<a href="#">Farm</a>	150025	Issued	Kim Dean	<a href="#">View</a>	<a href="#">Edit</a>

|< < Page 1 of 1 > >|

Goto page

Rows per page

10

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



Manage Account

Update My Profile

**Search for accounts**

Account number

Account name

Trading name

Contact name

Search

**Search for cardholder**

Card number

Registration

Search

**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

**Cost centres > Add Cost centre**

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](#)

Add Cost Center

Cancel

CardLink Online User Guide

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## 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

[Edit](#)

## 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](#)

[Save changes](#) [Cancel](#)

## 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](#)

**Search for cardholder**  
Card number   
Registration   
[Search](#)

**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** [Request new card](#)

Card number

[Advanced search](#)

[Clear search filters](#) [Search](#)

**Cardholder search results**

[Export](#)

Card	Registration Number	Issue Date	Expiry Date	Status	Cost centre	Actions
		12/03/2021	31/03/2024	Active		<div>- Select Action - - Select Action - View Details Edit Card Details Terminate Card Replace Card Change Cost Centre</div>

[< < 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

### Search for cardholder

Card number

Registration

Search

### 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

Edit card details

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

Card number

Issue date

Expiry date

Cost centre

Card Sent for Creation

In progress

Card Dispatched

Status

Active

Product allowed

Fuel and Oil - Current

Cardholder Details

Cardholder

Card type

Reference number

Contact details

Contact \*

Phone number \*

Work number

Mobile

Work phone

Email

ContactNotes

Contact Address

Physical address

Address \*

Suburb

Postcode \*

Find Postcode

Postal address

☐ Same as physical address

Address \*

Suburb

Postcode \*

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

Transaction limit

Daily limit

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

Search for cardholder

Card number

Registration

Search

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

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)

Phone number(postal address)

Work

Mobile

Alternate

Email

Address

Suburb

Postcode

Continue

Select a replacement reason and click continue

For changes to vehicle descriptions and registrations, you are required to order new cards.

CardLink Online User Guide

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# Change Cost Centre

Selecting 'Change cost centre' allows you to change the cost centres allocated to your cards

SummaryContact DetailsStatements/InvoicesTransactionsCost CentresCardsReports

Cards

Request new card

Card number

Advanced search

Clear search filters

Search

Cardholder search results

Export

Card	Registration Number	Issue Date	Expiry Date	Status	Cost centre	Actions
		12/03/2021	31/03/2024	Active		Change Cost Centre

< >

Page 1 of 1

Goto page

Rows per page

10

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		
<div>TransferCancel</div>		

# 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

DriveCard Ex All Vehicle Svcs

Cardholder details

Cardholder

Internal reference

As per how it should be embossed on CardSmart card

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

Daily limit

Monthly limit

Product allowed

Leave blank for no limit

Leave blank for no limit

Leave blank for no limit

Vehicle All Services - Current

Displayed on card

Card number

Company name

Cardholder

Expiry date

Description

31/05/2024

Vehicle All Services - Current

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)

Phone number(postal address)

Work

Mobile

Alternate

Email

Address

Suburb

Postcode

Sam Steel

095747723

accounts@fleetcor.co.nz

Private bag 99918

Newmarket

1149

Continue

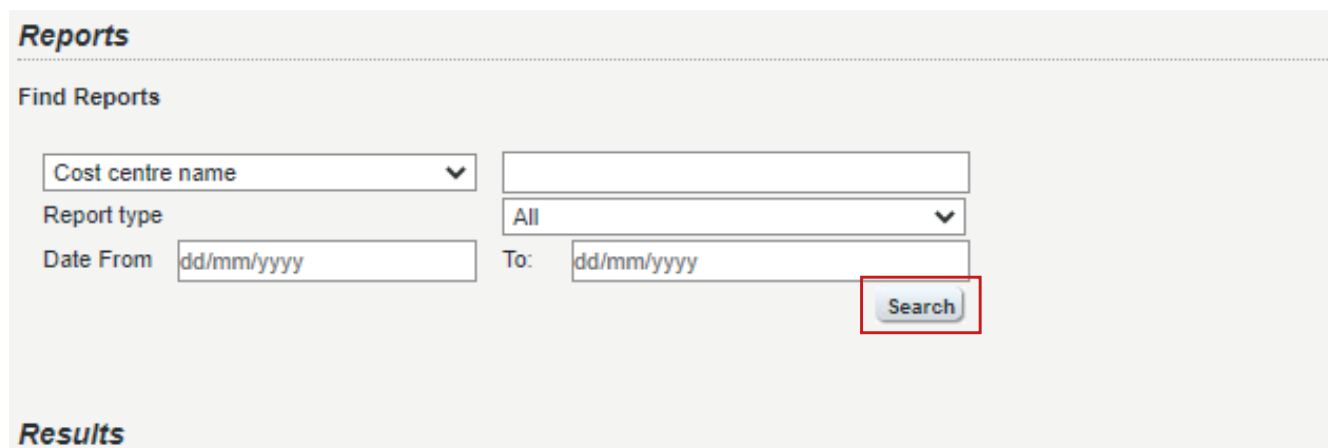
Confirm details are correct and click submit request and your card will be ordered.

## 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 has a header section titled "Reports" with a dotted line separator. Below this 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, and two date input fields labeled "Date From" and "To" with a placeholder "dd/mm/yyyy". A "Search" button is located at the bottom right of the search criteria, highlighted with a red rectangle. Below the search section is a "Results" section.

Select your criteria and click search.

Your reports will be displayed in a list – click 'download' to view your report.