

OPERATING LOAN CARD SUITE LITE APP GUIDE

Download the app to start managing your disbursement card remotely!

Key features include:

- Remote ability to turn card on/off if lost or stolen
- Instant alerts functionality for various notifications of transactions
- Real-time view of all transactions

GETTING STARTED WITH CARD SUITE LITE APP

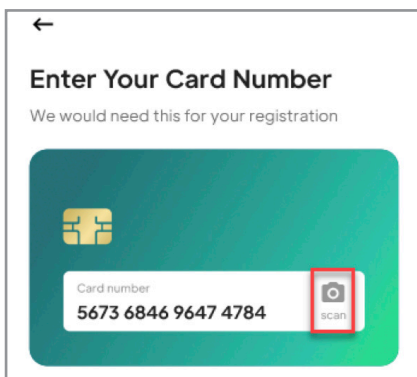
1. Download the **Card Suite Lite** app.
 - a. When prompted, allow notifications from app



2. Click **Sign Up** to get started.



3. Enter the full card number or click **Scan** to take a picture of the card. Click continue.



4. Enter the information on **Card Verification**;

click continue.

←

Add Card Details

56XX XXXX XXXX 4784

Name on card
Sarah Cooper

Expiration date (MM/YY)
07/24

Security code (CVC2/CVV2)
...

Continue

5. Enter the information on **User Verification**;
click continue.

←

Verify Your Identity

56XX XXXX XXXX 4784

Last 4 digits of SSN
6617

Continue

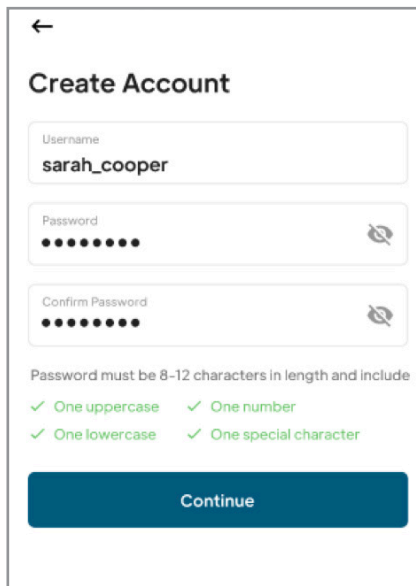


6. On **Terms & Conditions**, click Accept.

7. On **Privacy Policy**, click Accept.

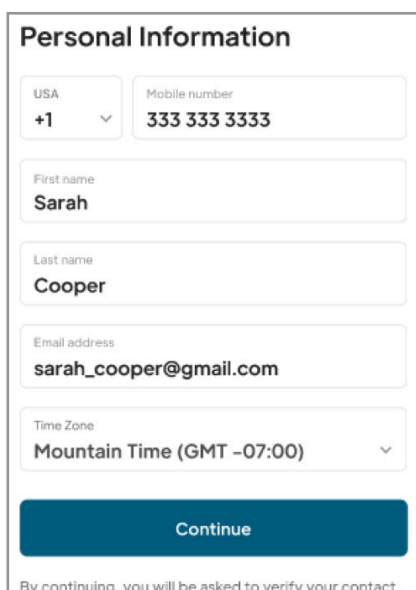
8. Complete all of the information on the **Create Account** screen.

- Username must be 6 to 16 characters in length
- Password must be 8 to 12 characters in length, with at least one uppercase, one lowercase, one number and one special character from !@#\$%^&*()_+~; cannot contain cardholder's name



The 'Create Account' screen features a back arrow at the top left. It has three input fields: 'Username' with the text 'sarah_cooper', 'Password' with masked dots and an eye icon, and 'Confirm Password' also with masked dots and an eye icon. Below these fields, a password requirement message states: 'Password must be 8-12 characters in length and include'. This is followed by four green checkmarks and labels: 'One uppercase', 'One number', 'One lowercase', and 'One special character'. At the bottom is a blue 'Continue' button.

9. Enter personal details and click Continue.



The 'Personal Information' screen has a title at the top. It contains several input fields: 'USA' with a dropdown arrow, 'Mobile number' with the text '333 333 3333', 'First name' with 'Sarah', 'Last name' with 'Cooper', 'Email address' with 'sarah_cooper@gmail.com', and 'Time Zone' with 'Mountain Time (GMT -07:00)' and a dropdown arrow. A blue 'Continue' button is at the bottom. Below the button, a small note reads: 'By continuing, you will be asked to verify your contact'.

10. Log in

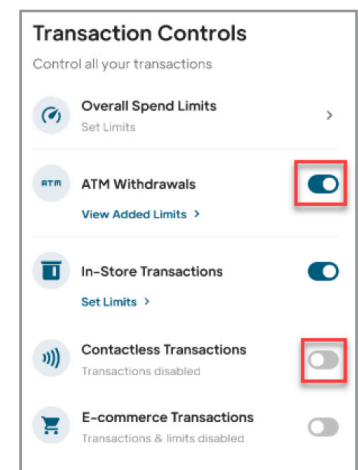
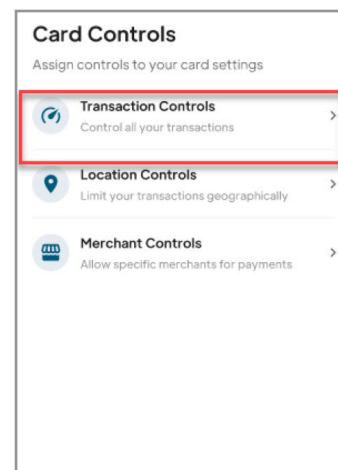
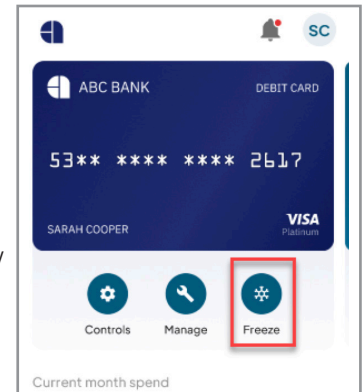
CARD SUITE LITE APP NAVIGATION

1. **Freeze** the in real time.

If the card is misplaced, you can turn the card off to avoid unauthorized transactions until found or reported lost.

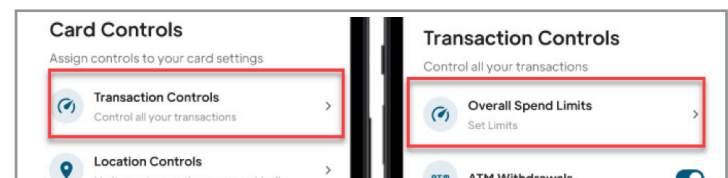
2. Transaction Controls allow you to set controls on the types of transactions that can be made as well as set overall spend limits per transaction, daily and/or monthly

a. Click on **Controls** and click the toggle button. If the toggle is gray, that item is turned off



3. Setting Transaction Spend Limits

a. Spend limits can be set per transaction, daily and/or monthly and at two different levels



4. View recent transactions.

a. The **Card Detail** page displays the transactions associated with the card for the last 12 months



Recent Transactions		
	Old Naples Club Oct 14 2021, 9:45AM	\$100.32 Declined
	7-Eleven Oct 14 2021, 9:45AM	\$29.54
	Netflix	\$82.00