



USER MANUAL
Brightwell Payments
CardWizard

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1. INTRODUCTION

1.1. About This Document

The purpose of this document is to provide a detailed description of the User screens and key processes associated with the CardWizard® Software. This document will explain for the User how the CardWizard Software works.

1.2. About CardWizard

CardWizard has been designed and implemented as an easy to use solution for the issuance of plastic cards. CardWizard allows users to provide employees with embossed and/or encoded plastic financial cards on the spot. The component can be used from any PC within the CardWizard network; provided the user has the proper permissions.

CardWizard Production Queue provides an easy to use interface for the instant issuance of financial cards associated to a card format. Each of these card formats are stored within CardWizard for each card type to be issued. Users may produce the card using a card printing machine; the cardholder name, expiration date and card account number will be printed on the front of card and the CVV2 number, web site address and issuing bank name will be printed on the back of the card.



2. *GETTING STARTED*

- A. Log in to the CardWizard workstation attached to the card machine using your Windows log in credentials.
- B. When card stock is delivered via Brinks, follow steps 3.1.A. through 3.1.E. to log card stock into the vault.

3. *CARDWIZARD ADMINISTRATOR*

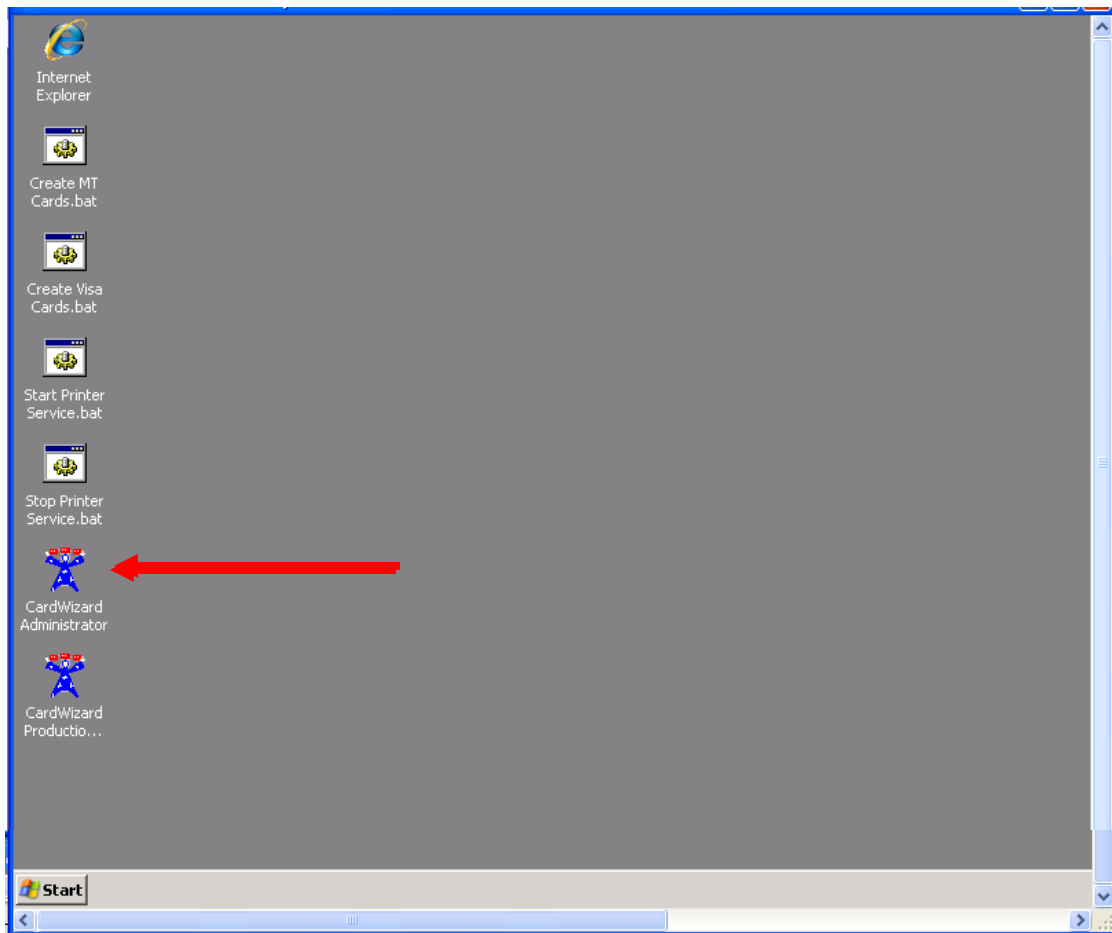


Figure 1 – CardWizard Desktop Icon

- A. Click on the CardWizard Administrator icon to access the Inventory, Production Queues, and Reports.
- B. Log in.

3.1. *Inventory*

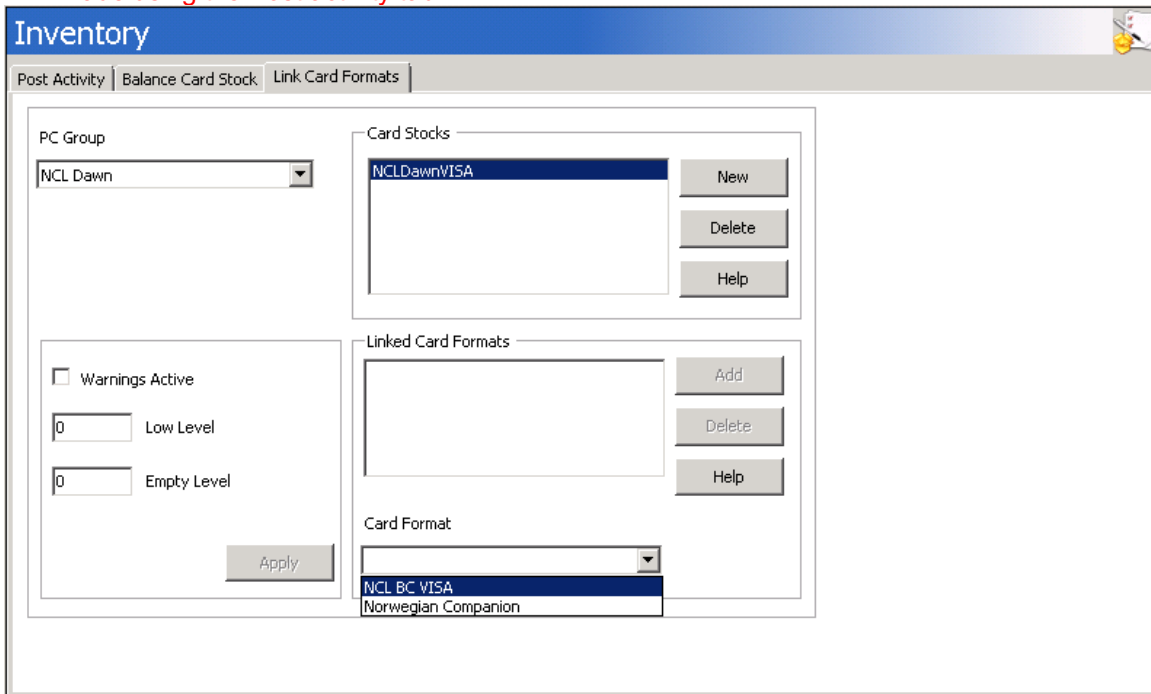
How to set up Card Stock Inventory:

Card Stock has to be set up in the Cardwizard Administrator before you are able to enter any received cards into your inventory.

Follow the below instructions and set up the Brightwell Visa Cards for your ship.

- Log on to Cardwizard Administrator
- Select "Inventory".
- Select "Link Card Formats".
 - New
 - Card Stock Name = PCLshipnameVISA (eg. "PCLRUBYVISA")

- OK
- After creating the card stock, link appropriate card formats to the card stock. **If card formats are not linked, the inventory will not record the cards that are printed automatically.**
 - With the card stock highlighted, select the card format drop down menu.
 - Select the card format to be linked and click the Add button.
 - Continue linking all appropriate card formats for that card stock.
- **If cards have been printed prior to linking card formats a manual inventory adjustment will have to be made using the Post activity tab.**



The screenshot shows the 'Inventory' application window with the 'Link Card Formats' tab selected. The window has a blue header bar with the title 'Inventory'. Below the header is a tab bar with three tabs: 'Post Activity', 'Balance Card Stock', and 'Link Card Formats'. The main content area is divided into several sections:

- PC Group:** A dropdown menu showing 'NCL Dawn'.
- Card Stocks:** A list box containing 'NCLDawnVISA'. To the right of the list are three buttons: 'New', 'Delete', and 'Help'.
- Warnings Active:** A checkbox that is currently unchecked.
- Low Level:** A text input field containing '0'.
- Empty Level:** A text input field containing '0'.
- Apply:** A button located below the level fields.
- Linked Card Formats:** An empty list box. To its right are three buttons: 'Add', 'Delete', and 'Help'.
- Card Format:** A dropdown menu showing 'NCL BC VISA' and 'Norwegian Companion' as options.

Now the Card Stock Name has been set up, you can now go back to Post Activity and enter in the cards received from the Courier and add them to the vault.

NOTE: You must set up the “Card Stock Name” and enter cards into Inventory before printing any cards, otherwise your card balance will be incorrect.

CardWizard provides complete inventory and balancing functions for blank card stock use and card machine use.

A. Click the Inventory icon on the left side of the screen.

NOTE: Skip to step F if card stock has already been logged in to the vault.

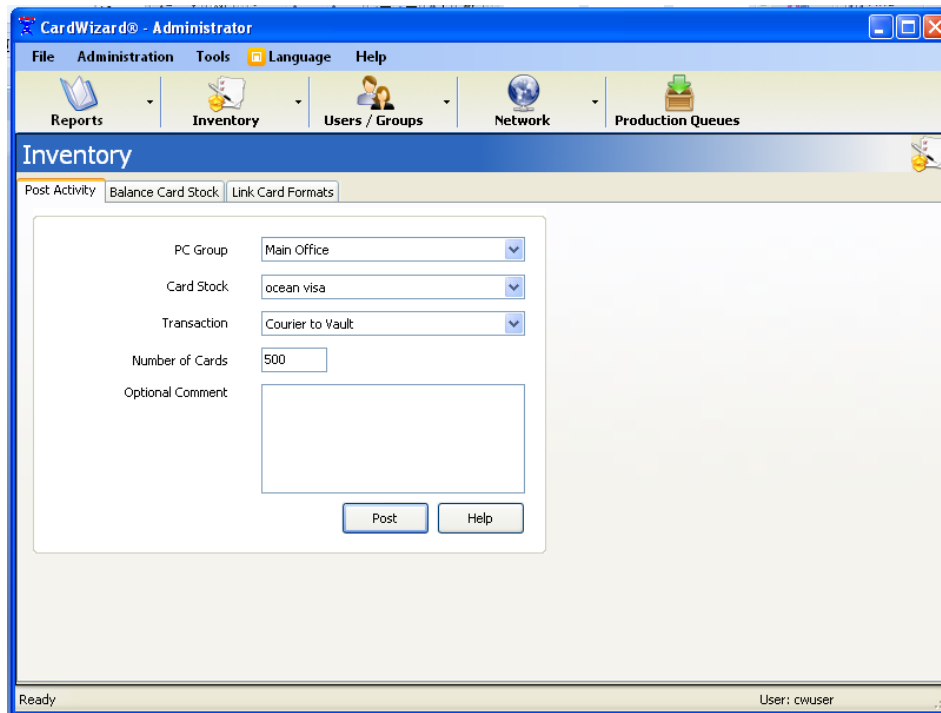


Figure 2 – CardWizard Administrator Inventory Screen: Post Activity

- B.** When the initial inventory is received, choose the Post Activity tab in Inventory.

Post Activity

This tab is used to manually post activity transactions against the card stock inventory. The PC Group, Card Stock, Transaction Type, Number of Cards, and Optional Comments may be designated.

- C.** Choose the correct card stock from the first drop-down box. Choose Courier to Vault in the Transaction drop-down box.
- D.** Enter the number of cards that you are logging in.

a. Note:

- Verification of the card stock received: When you receive the blank card it is extremely important that the cards are physically counted one at a time.
- Do not assume that the count is correct.
- Do not perform the count by stacking the bundles.
- The count needs to be performed by counting each one of the cards. The cards are not always cut the same; this is why we do not recommend that you stack the cards when counting.
- When handling the cards try not to touch the body of the cards, handle them by the sides or count with the tip or the eraser.

- E.** Click **Post**. Otherwise, click **Help** for additional information.

NOTE: If the wrong amount of card stock is posted, use the Vault to Courier option and enter the amount that exceeds the actual count. For example, if 500 cards should have been posted, but 5000 were actually posted, post 4500 as Vault to Courier.

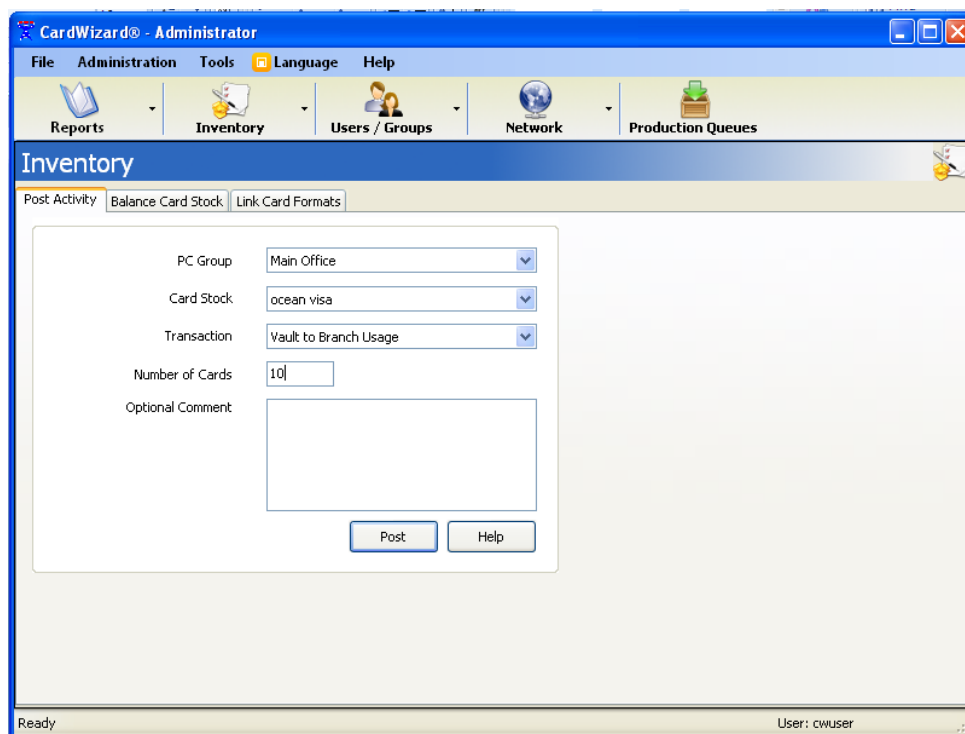


Figure 3 – CardWizard Administrator Inventory Screen: Post Activity

- F. Before printing cards, use the Vault to Branch Usage option to post the amount of cards that you are taking out of the vault.
- G. Click **Post**. Otherwise, click **Help** for more information.

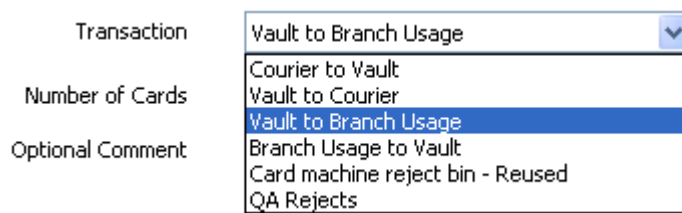
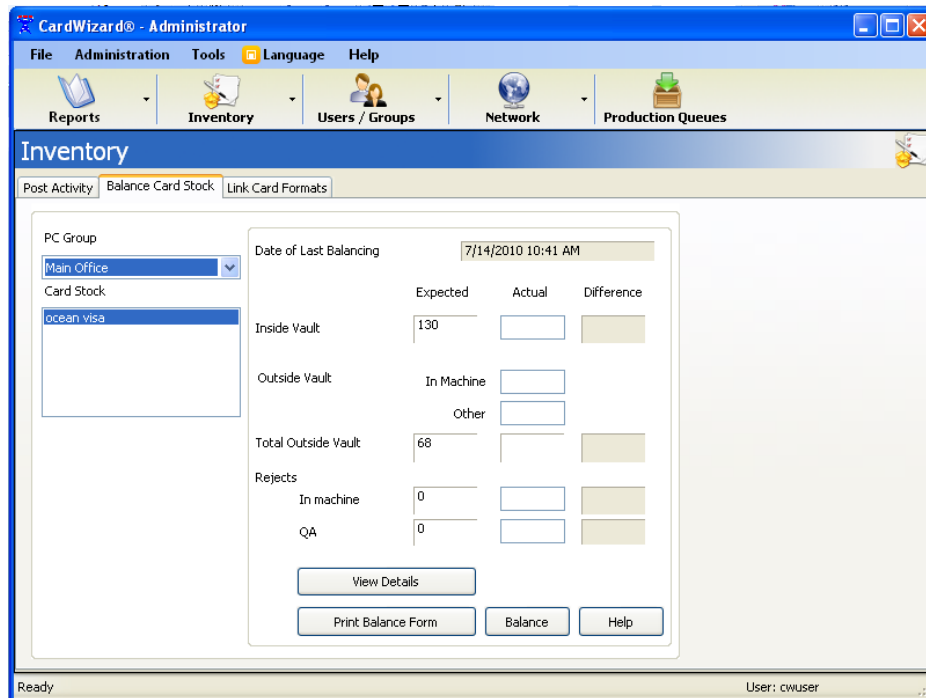


Figure 4 – Transaction Options

Transaction options:

1. **Courier To Vault** - Used when card stock is received.
2. **Vault To Courier** - Used when card stock is taken off the vessel.
3. **Vault To Branch Usage** - Used when card stock is removed from the vault to be used for printing.
4. **Branch Usage To Vault** - Used when printing is complete and excess card stock is being returned to the vault.
5. **Card machine reject bin - reused** - Used when cards that were rejected by the machine are able to be reused.
6. **QA Rejects** - Used when the user rejects a printed card due to cosmetic issues.

CardWizard tracks each card stock item. The “current card” count is based upon the cards both in the vault and outside of the vault. These counts are adjusted when the cards are physically moved into and out of the system, and when cards are produced by the card machine.



	Expected	Actual	Difference
Inside Vault	130		
Outside Vault			
In Machine			
Other			
Total Outside Vault	68		
Rejects			
In machine	0		
QA	0		

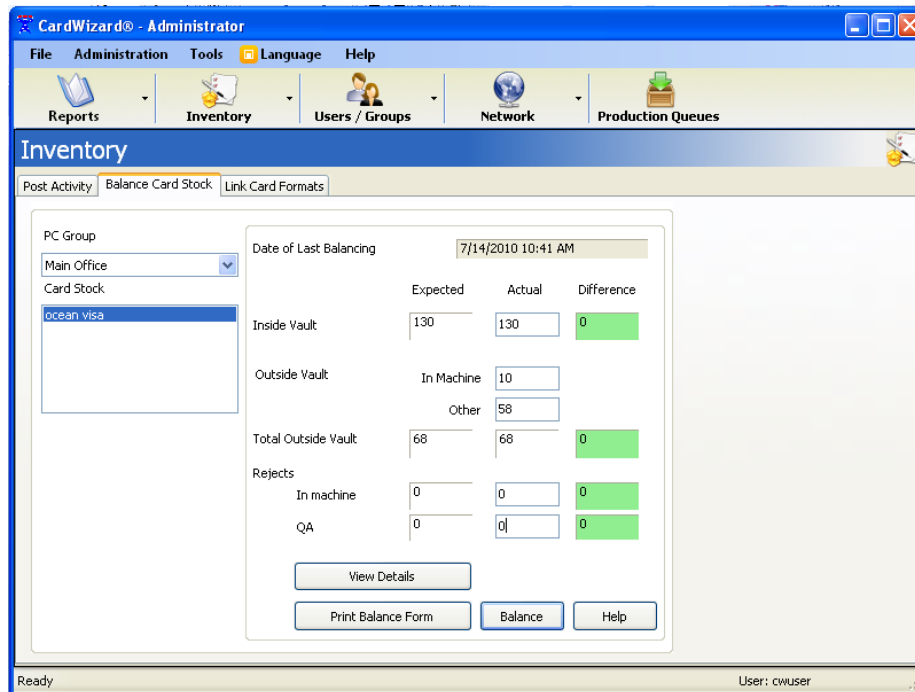
Figure 5 – CardWizard Administrator Inventory Screen: Balance Card Stock

On the Balance Card Stock tab, highlight the card stock that is to be balanced.

Balance Card Stock

This tab is used to track each card stock item. Card Stock is affected by the transactions performed in the Post Activity Tab as well as cards that are produced by the card machine (this includes any cards that are rejected by the machine or by the user). Card Stock can be selected using the drop down arrows within this tab.

Note: The card stock must be balanced every day cards are produced once all the cards in the queue have been printed.



	Expected	Actual	Difference
Inside Vault	130	130	0
Outside Vault			
In Machine		10	
Other		58	
Total Outside Vault	68	68	0
Rejects			
In machine	0	0	0
QA	0	0	0

Figure 6 – CardWizard Administrator Inventory Screen: Balance Card Stock

Expected: calculated CardWizard system numbers based upon card production activity and manual transactions that have been posted for the selected card stock since the last balancing.

Actual: numbers provided by the user. These are obtained by physically counting the blank card stock in the vault and outside of the vault.

Difference: numbers calculated by CardWizard. These indicate difference between the expected and the actual numbers. If “in balance” the value will be zero and the background color will be green. If “out of balance” the value is non-zero and the background is red.

Inside Vault: number of cards inside the vault.

Outside Vault: number of cards outside of the vault that have not yet been produced.

Rejects-In Machine: total number of cards that were rejected by the card machine and placed in the reject bin inside the machine since this card stock was last balanced. Cards can be rejected due to a problem with the magnetic stripe, or if a mechanical error occurred with the card machine.

Please Note: The Inventory system assumes that rejected cards will be destroyed. If you wish to re-use a card that was rejected, you will need to post an inventory transaction to add the card back to the vault.

Rejects-QA: total number of cards that were rejected by the user due to some visual problem such as poor topping, misspelled name, etc.

CARDWIZARD®

Inventory Balancing History Report

CONFIDENTIAL
INFORMATION

Report Criteria: Dates: 3/3/2010 - 4/9/2011
 PC Group: Main Office
 Card Stock Name: [All Card Stocks]

	Inside Vault	Outside Vault In Machine	Outside Vault Other	Outside Vault Total	Rejects In Machine	Rejects QA
ocean visa						
Balanced on: 7/8/2010 10:56:13AM						
Date: 7/22/2009 2:58:00PM	0	0	0	0	0	0
Activity: Starting Balance						
User:						
Date: 7/22/2009 2:59:00PM	+200	0	0	0	0	0
Activity: Courier to vault						
User: cwuser						

Figure 7 - CardWizard Administrator Inventory Screen: View Details Screen

View Details: provides a spreadsheet of how CardWizard arrived at the expected numbers for the selected card stock. The spreadsheet will provide the following standard information:

- **Starting Balance:** date and time of either the last time this card stock was balanced or when the card stock was defined in the CardWizard system.
- **Transactions:** all manually posted transactions will appear since the date of the last balancing. Each transaction will be appropriately noted on the inside vault and outside vault totals.
- **Cards Made:** displays the total number of cards produced successfully by the card machine using this card stock.
- **Machine Rejects:** displays the total number of cards produced unsuccessfully by the card machine using this card stock.

CardWizard® - Administrator

File Administration Tools Language Help

Reports Inventory Users / Groups Network Production Queues

Inventory

Post Activity Balance Card Stock Link Card Formats

PC Group

Main Office

Card Stock

ocean visa

Date of Last Balancing

7/14/2010 10:41 AM

	Expected	Actual	Difference
Inside Vault	130	130	0
Outside Vault	In Machine	10	
	Other	58	
Total Outside Vault	68	68	0
Rejects			
In machine	0	0	0
QA	0	0	0

View Details

Print Balance Form

Balance

Help

Ready
User: cwuser

Figure 8 – CardWizard Administrator Inventory Screen: Balance Card Stock

- H. After manually counting inventory, enter the totals in the Actual column. The numbers in the Difference column should be zero and the background will be green.
- I. Click **Balance**. Otherwise, click **Help** for additional information.

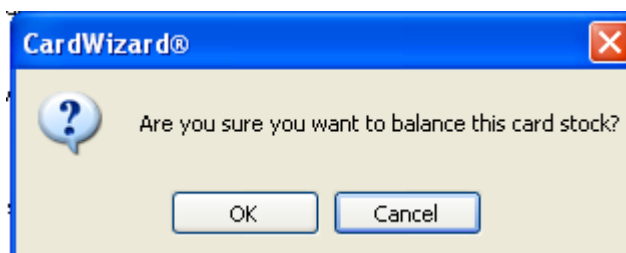
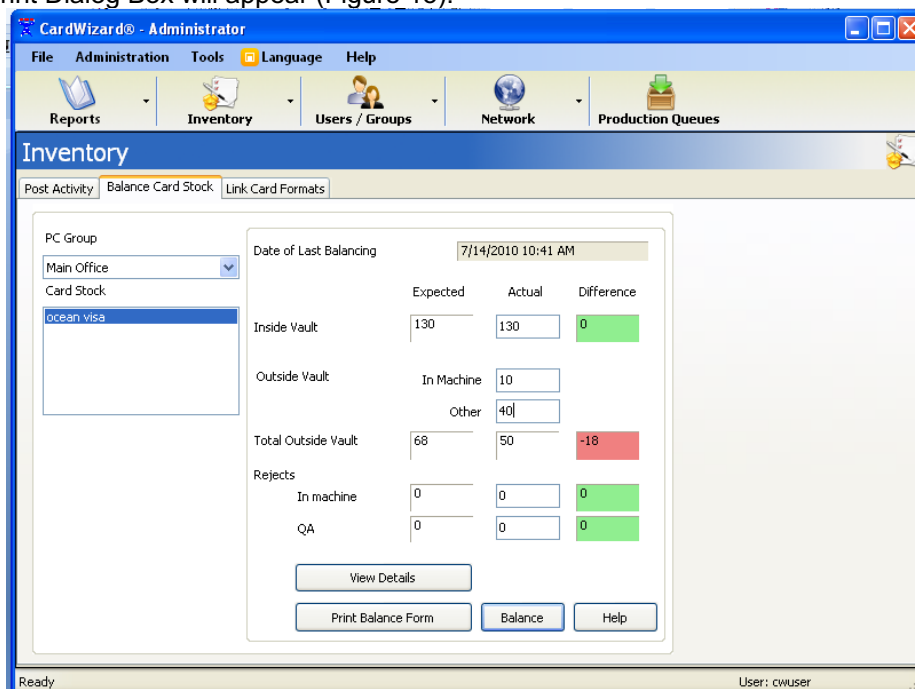


Figure 9 – Balance Alert Box

- J. Click **OK** to proceed. Otherwise, click **Cancel**.

The Print Dialog Box will appear (Figure 15).



The screenshot shows the "CardWizard® - Administrator" window. The "Inventory" tab is selected, and the "Balance Card Stock" sub-tab is active. The "PC Group" is set to "Main Office" and the "Card Stock" is "ocean visa". The "Date of Last Balancing" is "7/14/2010 10:41 AM".

	Expected	Actual	Difference
Inside Vault	130	130	0
Outside Vault			
In Machine		10	
Other		40	
Total Outside Vault	68	50	-18
Rejects			
In machine	0	0	0
QA	0	0	0

Buttons at the bottom: View Details, Print Balance Form, Balance, Help.

Figure 10 – CardWizard Administrator Inventory Screen: Balance Card Stock

If the Actual count is different than the Expected count, the Difference box will have a red background. A balance can be forced if necessary.

- K. Click **Balance**. Otherwise, click **Help** for additional information.

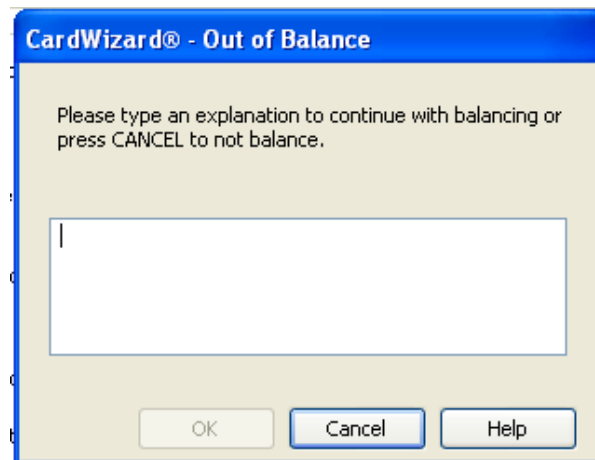


Figure 11 – Out of Balance Dialog Box

The Out of Balance dialog box will appear.

- L. Type an explanation of why the card stock is out of balance.
- M. Click **OK**. Click **Cancel** to cancel the dialog box. Otherwise, click **Help** for more information.

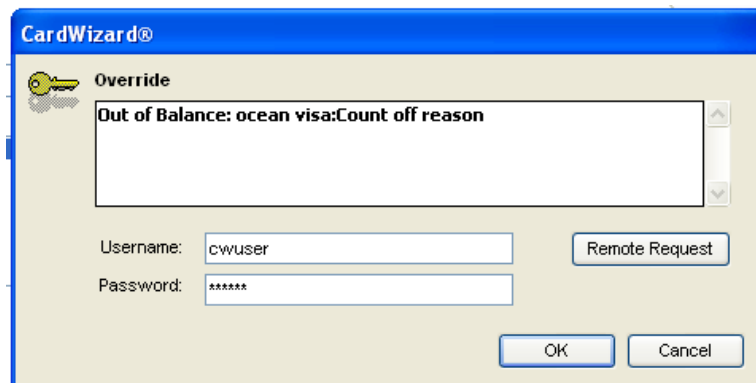


Figure 12 – Override Login

- N. A second user will have to enter their User Name and Password in order to allow the card stock to be force balanced.
- O. Click **OK**. Click **Remote Request** to make a remote request. Otherwise, click **Cancel** to cancel the dialog box.

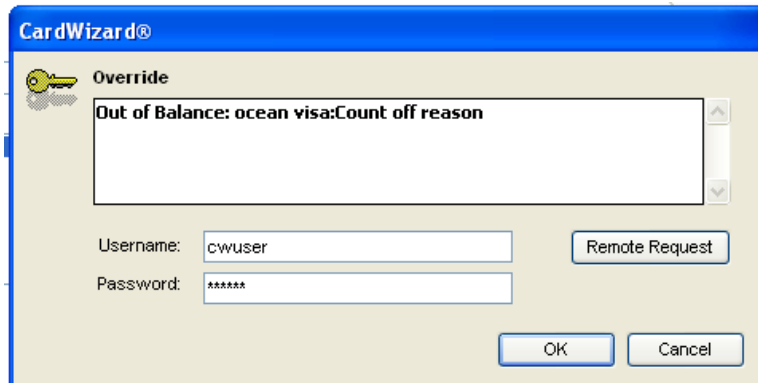


Figure 13 – Override Login

If the same user that originally balanced the card stock tries to override the inventory, the system will not allow it.



Figure 14 – Override Required Pop Up Box

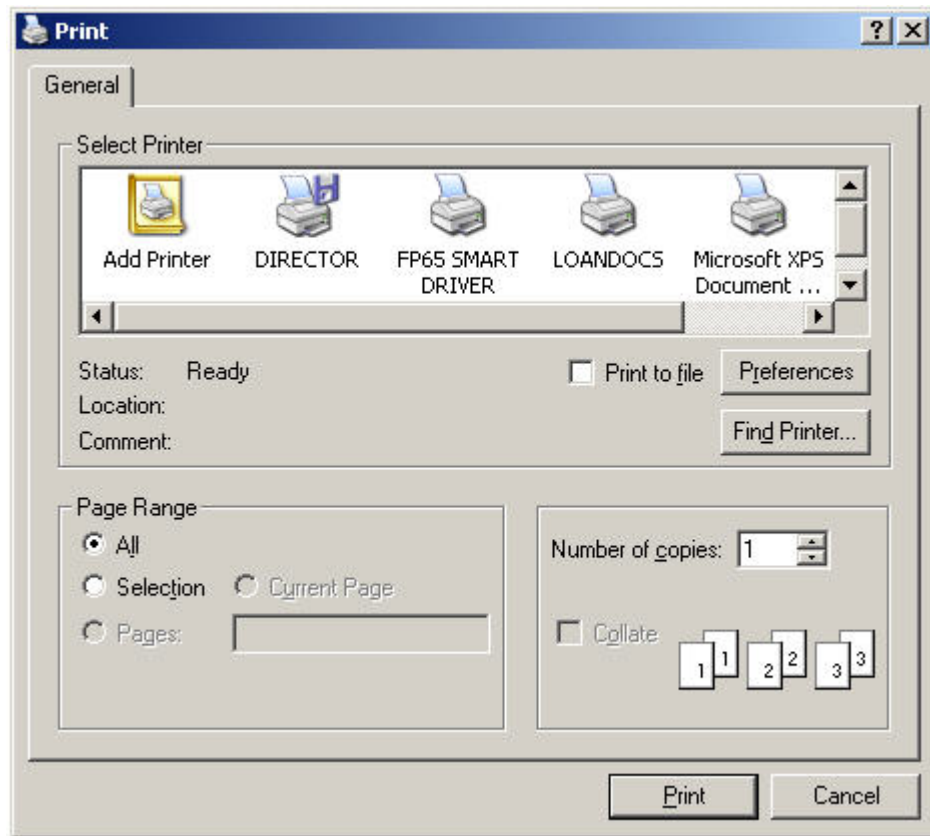
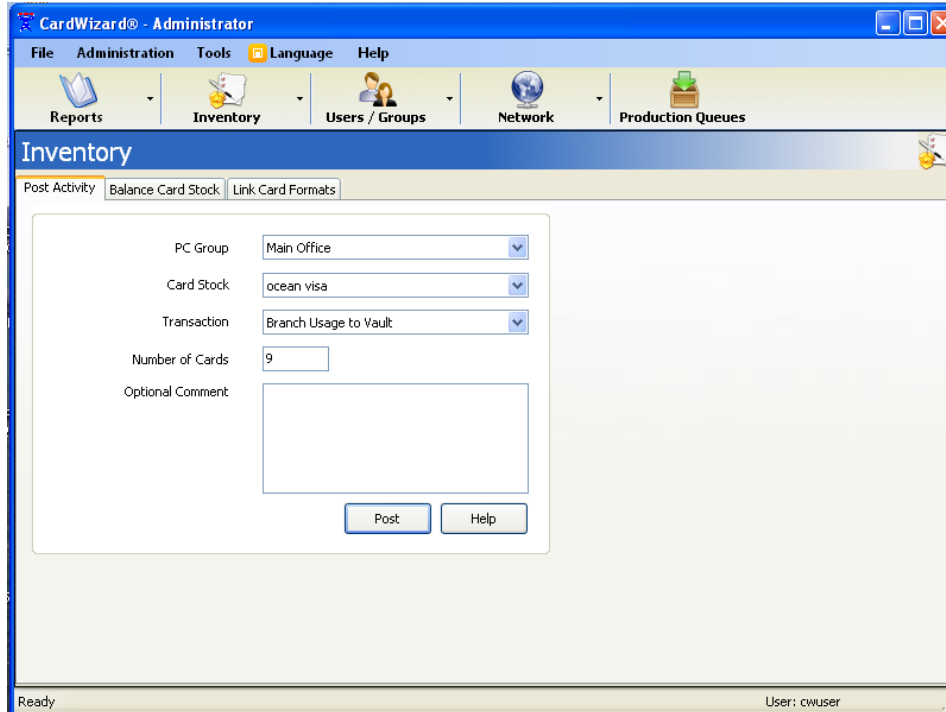


Figure 15 – Print Dialog Box

The Print dialogue box will appear.

- P.** Click **Print**. Otherwise, click **Cancel**.
- Q.** When finished printing cards, return excess card stock to the vault.



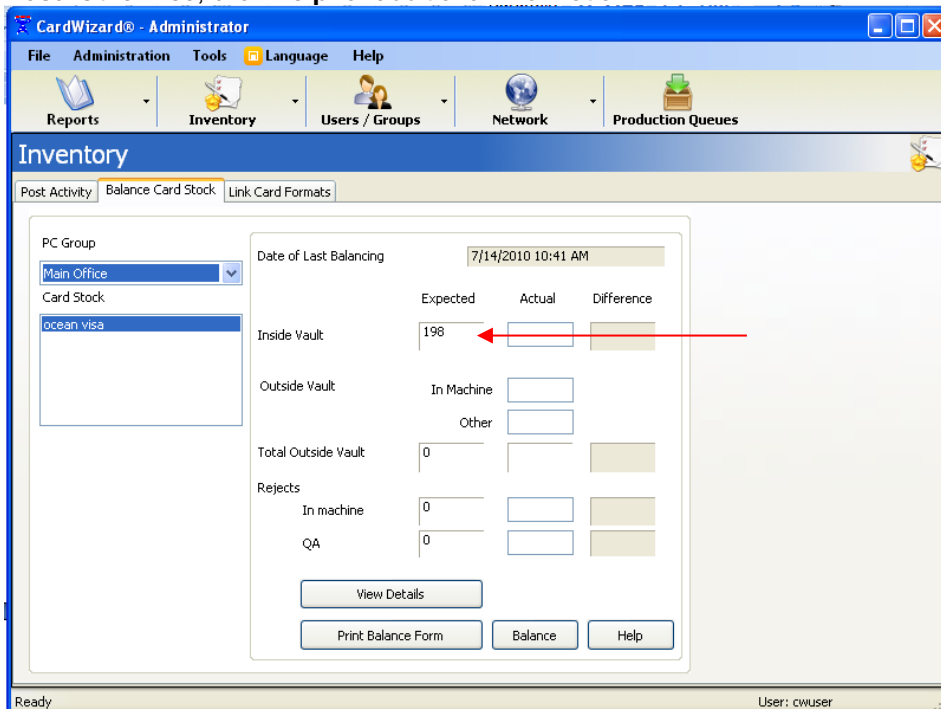
The screenshot shows the 'CardWizard® - Administrator' window with the 'Inventory' tab selected. The 'Post Activity' sub-tab is active. The form contains the following fields:

- PC Group: Main Office (dropdown)
- Card Stock: ocean visa (dropdown)
- Transaction: Branch Usage to Vault (dropdown)
- Number of Cards: 9 (text input)
- Optional Comment: (empty text area)

At the bottom of the form are two buttons: 'Post' and 'Help'.

Figure 16 – CardWizard Administrator Inventory Screen: Post Activity

- R. On the Post Activity tab in Inventory, choose Branch Usage to Vault in the Transaction drop-down box.
- S. Enter the number of blank cards you are returning to the vault.
- T. Click **Post**. Otherwise, click **Help** for additional information.



The screenshot shows the 'CardWizard® - Administrator' window with the 'Inventory' tab selected. The 'Balance Card Stock' sub-tab is active. The form contains the following fields:

- PC Group: Main Office (dropdown)
- Card Stock: ocean visa (dropdown)
- Date of Last Balancing: 7/14/2010 10:41 AM (text input)

	Expected	Actual	Difference
Inside Vault	198		
Outside Vault			
In Machine			
Other			
Total Outside Vault	0		
Rejects			
In machine	0		
QA	0		

At the bottom of the form are four buttons: 'View Details', 'Print Balance Form', 'Balance', and 'Help'.

Figure 17 – CardWizard Administrator Inventory Screen: Balance Card Stock

The Balance Card Stock tab will show that all inventory is back in the vault.

3.2. Production Queue

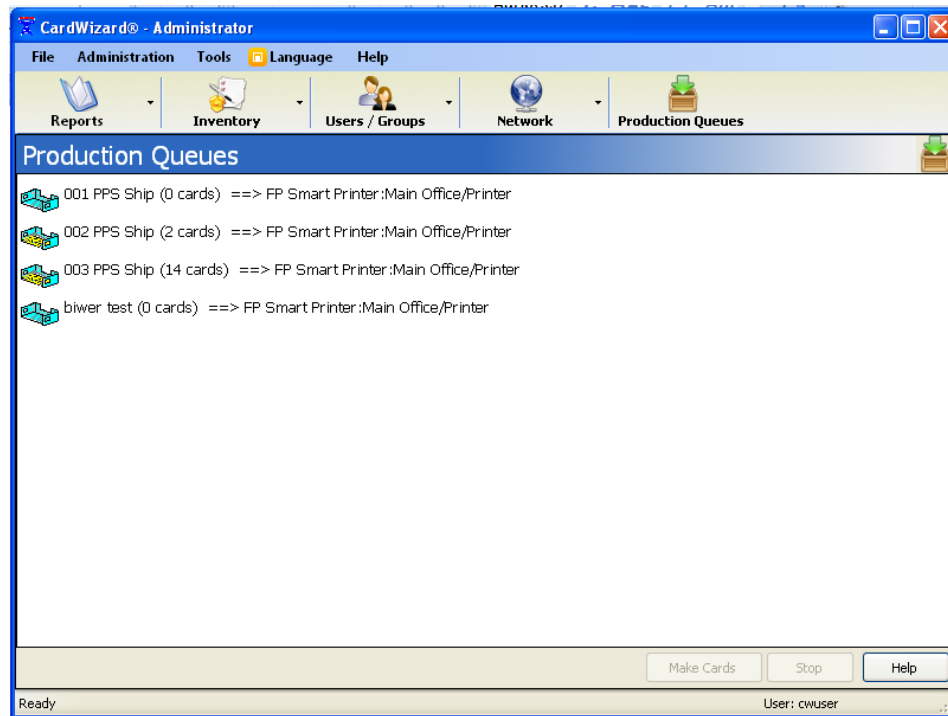


Figure 18 – CardWizard Administrator Production Queues Screen

By clicking on the Production Queue icon, all production queues for the fleet will appear with the amount of cards in each queue.

IMPORTANT: This tab should not be used.

The user will not be able to print cards from a production queue that is not their own.

3.3. Reports

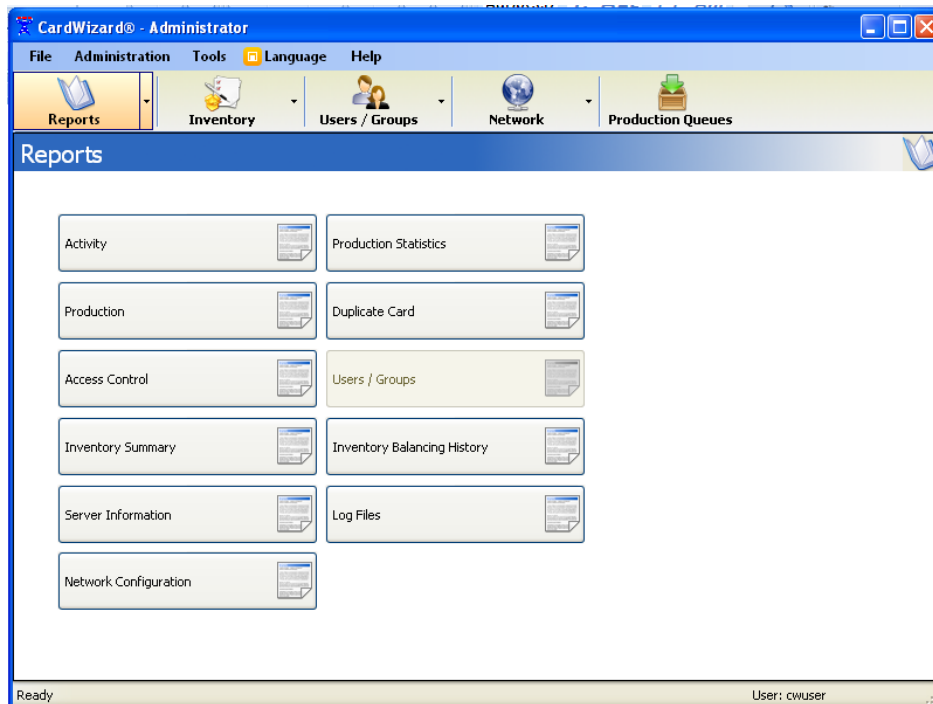


Figure 19 – CardWizard Administrator Reports Screen

- A. Click on the **Reports** icon. The reports available will appear. The User will not have or need access to the reports that are grayed out.

Activity

The Activity Log provides an audit trail of various events within the system. These events include users starting and ending a session, card requests being submitted and processed, cards formats being changed, and status information about the card machine devices.

- Selection Criteria
 - Specific Date or Date Range
 - User(s)
 - Type of Activity

Access Control Report

CardWizard maintains information on each user that connects with the server component. This connection is referred to as a “session”. Each CardWizard component must establish a session with the server component. This process requires the user to enter their user name and password.

- Selection Criteria
 - Specific Date or Date Range
 - User(s)
 - Group by PC Group

Production Statistics

The Production Statistics Report displays the production statistics which include both cards that were produced without errors (good) and cards that ended up inside the machine as rejects due to various reasons (rejects). The rejected cards will need to be destroyed or reused.

- Selection Criteria
 - Specific Date or Date Range
 - User(s)

Production

The Production Log provides an audit trail of cards produced by the system. This is the Report that the User will use most often.

- Selection Criteria
 - Specific Date or Date Range
 - User(s)
 - Production Type (Choose New Card)
 - Optional Criteria
 - Card Number (last 4 digits)
 - Cardholder name (full or partial)
 - Include (New card is only optional criteria needed for this program)

B. Click on the **Production** icon.

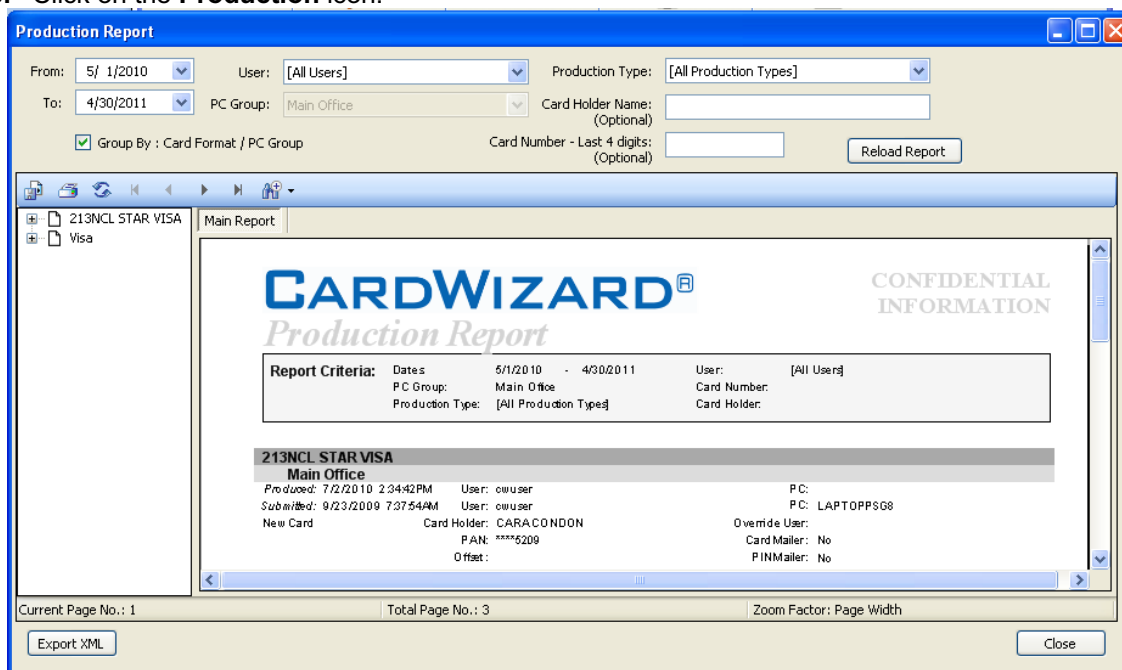


Figure 20 – CardWizard Administrator Reports Screen: Production Log

C. Choose the criteria by which the report should be run.

The user will only be able to access the PC Group that they are assigned to.

D. Click **Reload Report**. Click **Close** to cancel the dialog box. Otherwise, select **Help** for additional information.

Production Report

Report Criteria:	Dates: 5/1/2010 - 4/30/2011 PC Group: Main Office Production Type: [All Production Types]	User: [All Users] Card Number: Card Holder:
-------------------------	---	---

Visa

Main Office

Produced: 1/7/2011 2:15:48PM	User: omuser	PC:
Submitted: 1/7/2011 2:15:19PM	User: omuser	PC: LAPTOPPS08
New Card	Card Holder: BILL BIWER	Override User:
	PAN: ****4373	Card Mailer: No
	Offset:	PIN Mailer: No

Produced: 2/22/2011 10:41:27AM	User: omuser	PC:
Submitted: 2/22/2011 10:40:57AM	User: omuser	PC: LAPTOPPS08
New Card	Card Holder: BILL BIWER	Override User:
	PAN: ****2673	Card Mailer: No
	Offset:	PIN Mailer: No

Produced: 2/22/2011 10:48:44AM	User: omuser	PC:
Submitted: 2/22/2011 10:48:17AM	User: omuser	PC: LAPTOPPS08
New Card	Card Holder: BILL BIWER	Override User:
	PAN: ****2673	Card Mailer: No
	Offset:	PIN Mailer: No

Produced: 2/22/2011 11:06:54AM	User: omuser	PC:
Submitted: 2/22/2011 11:06:27AM	User: omuser	PC: LAPTOPPS08
New Card	Card Holder: SANDY GAETH	Override User:
	PAN: ****2681	Card Mailer: No
	Offset:	PIN Mailer: No

Figure 21 – Production Report

The Production Report will show; the date, time, and user that produced the card; the date and time the record was submitted; and the name of the cardholder and last four (4) digits of the card produced, sorted by card type.

- E.** Click **Print**. Click **Cancel** to cancel the process. Otherwise, select **Help** for additional information.

4. *CARDWIZARD PRODUCTION QUEUE CLIENT*

4.1. *Printing Cards*

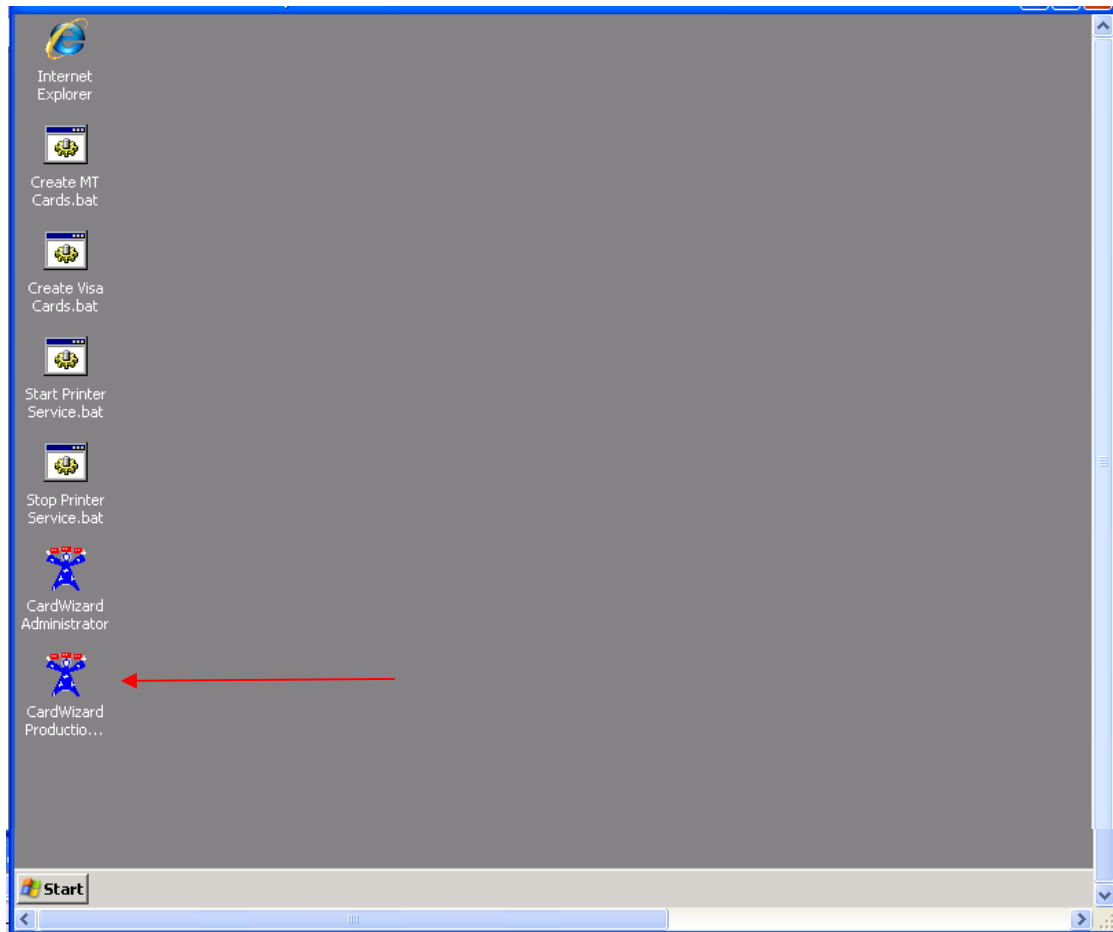


Figure 22 – Desktop Icons

- A.** Click on the **CardWizard Production Queue Client** to begin printing.



Figure 23 – CardWizard Startup Screen

The program will run, and the user will be automatically taken to the login screen for the CardWizard Production Queue Client.

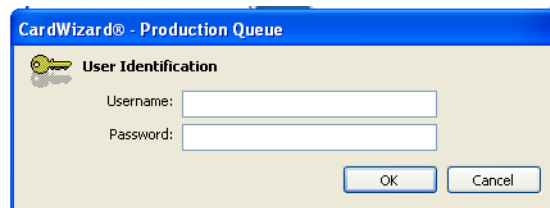


Figure 24 – Login Box

- B.** Enter User Name and Password.
- C.** Click **OK**. Otherwise, click **Cancel** to close the login box.



Figure 25 – Change Password Box

- A.** The first time a user logs in the system requires the user to change their password. Enter the current password and a new password twice. Click **OK**. Otherwise, click **Cancel** to close the login box.

The name of the production queue will contain your ship name and the type of card product.

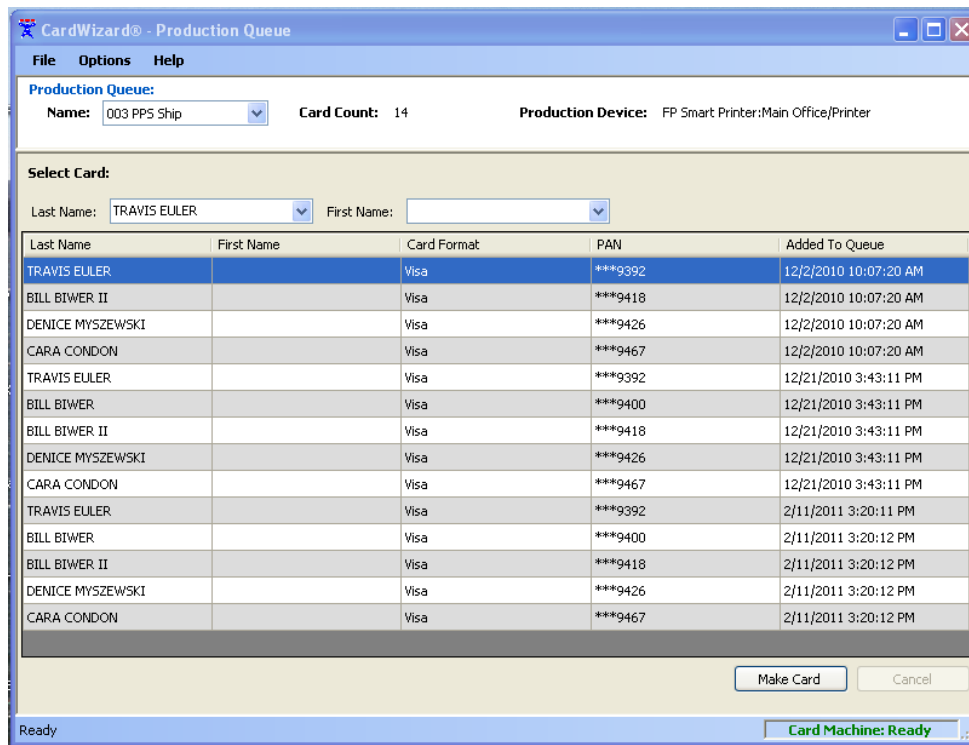


Figure 26 – Production Queue Screen

All of the cards that are in the queue will be listed. Both first and last name will be in the Last Name column.

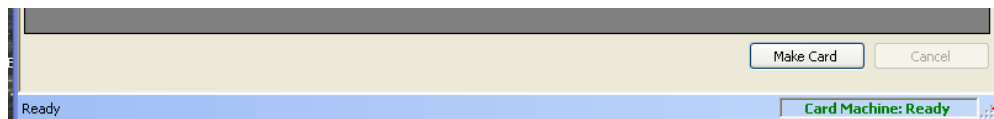


Figure 27 – Production Queue Screen

The status bar in the bottom right corner indicates the card machine's status. Figure 27 indicates that the card machine is communicating with the work station and cards can be printed.

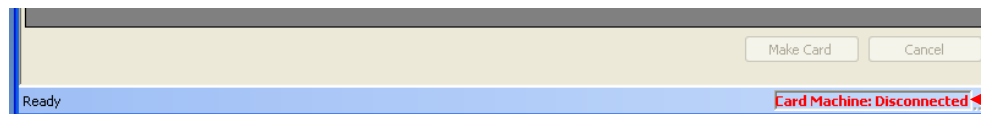


Figure 28 – Production Queue Screen Status Bar

Figure 28 indicates that the card machine is not connected to the workstation.

- B. Highlight a card by clicking on it, and then click the **Make Card** button. Otherwise, click **Cancel**. The dialogue box in Figure 29 will appear.

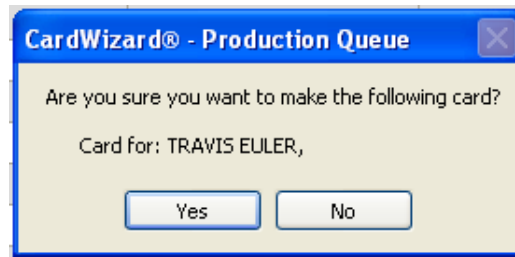


Figure 29 – Make Card Dialog Box

Click **Yes**. Otherwise, click **No** to close the dialog box.

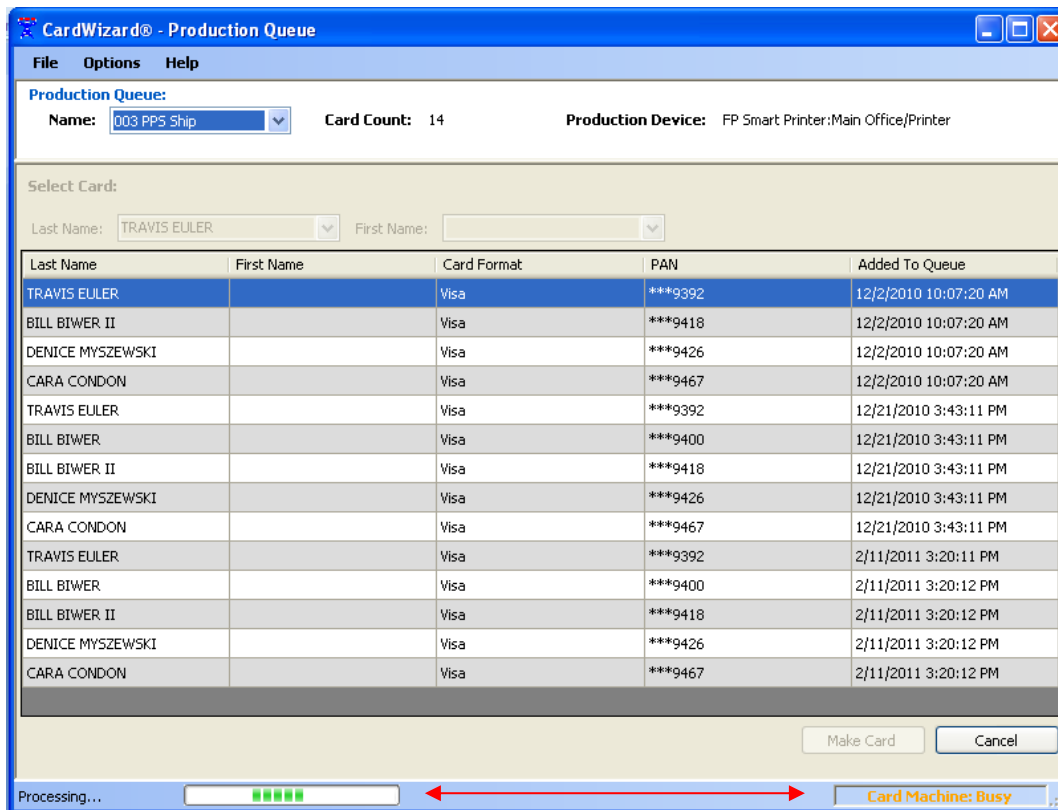


Figure 30 – Production Queue Screen Status Bars

The status bars will indicate that the card is in the process of printing.

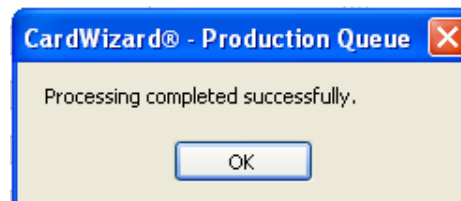
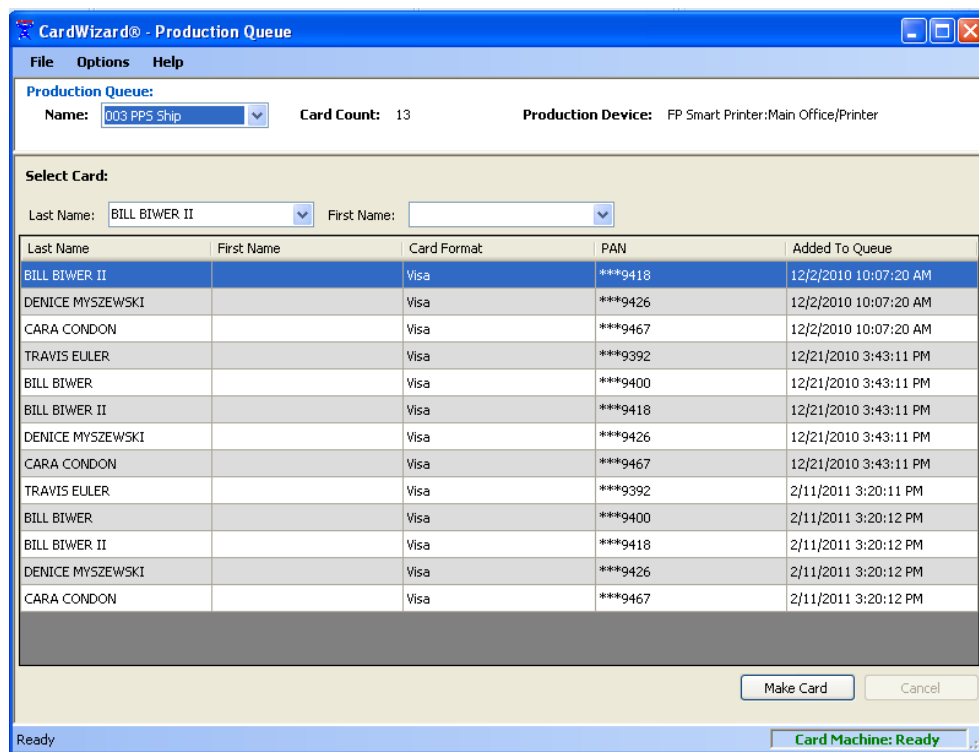


Figure 31 – Card Completion Dialog Box

Once the card printing is complete, the dialogue box in Figure 31 will appear.

C. Click **OK**.



CardWizard® - Production Queue

File Options Help

Production Queue:

Name: 003 PPS Ship Card Count: 13 Production Device: FP Smart Printer:Main Office/Printer

Select Card:

Last Name: BILL BIWER II First Name:

Last Name	First Name	Card Format	PAN	Added To Queue
BILL BIWER II		Visa	***9418	12/2/2010 10:07:20 AM
DENICE MYSEWSKI		Visa	***9426	12/2/2010 10:07:20 AM
CARA CONDON		Visa	***9467	12/2/2010 10:07:20 AM
TRAVIS EULER		Visa	***9392	12/21/2010 3:43:11 PM
BILL BIWER		Visa	***9400	12/21/2010 3:43:11 PM
BILL BIWER II		Visa	***9418	12/21/2010 3:43:11 PM
DENICE MYSEWSKI		Visa	***9426	12/21/2010 3:43:11 PM
CARA CONDON		Visa	***9467	12/21/2010 3:43:11 PM
TRAVIS EULER		Visa	***9392	2/11/2011 3:20:11 PM
BILL BIWER		Visa	***9400	2/11/2011 3:20:12 PM
BILL BIWER II		Visa	***9418	2/11/2011 3:20:12 PM
DENICE MYSEWSKI		Visa	***9426	2/11/2011 3:20:12 PM
CARA CONDON		Visa	***9467	2/11/2011 3:20:12 PM

Make Card Cancel

Ready Card Machine: Ready

Figure 32 – Production Queue Screen

The card record will be removed from the queue, and the status bar will indicate that the next card can be printed.

- D. Continue steps **B and C** until the queue is empty, and all cards have been printed.
- E. Click on the File tab in the upper left corner and exit out of the Production Queue.
- F. Remove card stock from the card machine.
- G. Complete inventory steps **3.1.F.** through **3.1.T** before and after printing cards.

4.2 Procedures for Starting and Stopping the Print Service

On the desktop of the card printing workstation, there are two icons for starting and stopping the printer service. There is a service that runs in the background and communicates with the card printing host in Chicago. We do not want to have the communications running when you are not printing cards. You will need to stop the service when done printing and restart the service when you need to print.

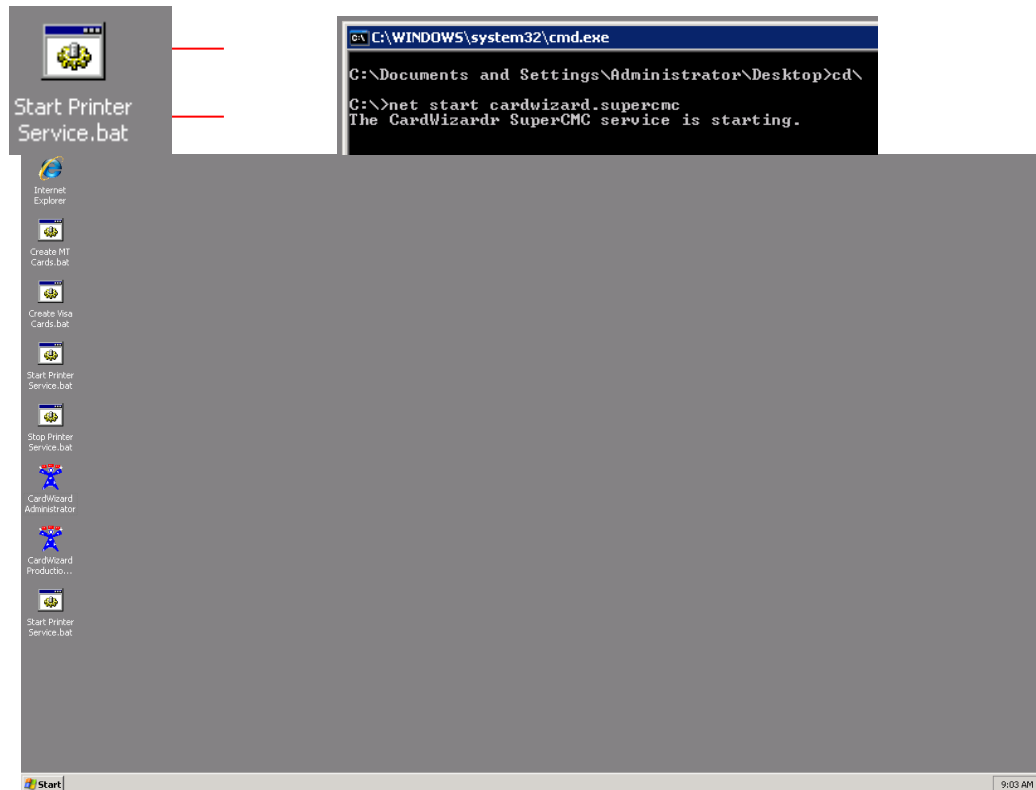
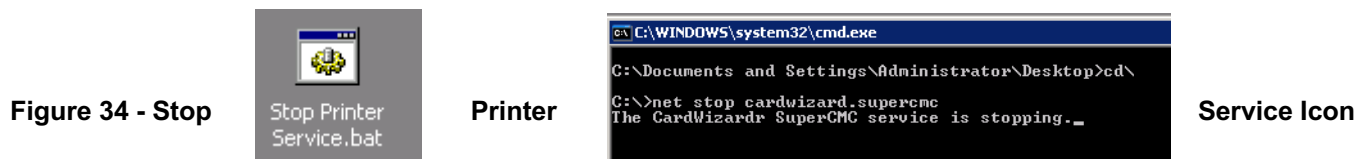


Figure 33 – Printer Service Desktop Icons

- A.** Double click on the StopPrinterService.bat icon to stop the communications to the host.



This will cause the green icon on the system tray to disappear.

- B.** When you are ready to print, double click on the StartPrinterService.bat icon.

Figure 35 – Start Printer Service Icon



Figure 36 – Printer Service Icon

online.

The green icon in Figure



36 will indicate that the card machine is back