



CONVENIENT CARDS

End User Training

CC Studio

Convenient Cards

CC Studio Training

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The Launch Page

www.convenientcards.com/ccstudio

Card Orders **CC Studio Login**

CONVENIENT CARDS

Home Your Products Program Management FAQ Training Contact Us

GET OUR FREE MOBILE BANKING APP

- CHECK BALANCE
- VIEW TRANSACTION HISTORY
- ADD MONEY TO YOUR CARD
- PAY BILLS
- GET BALANCE AND TRANSACTION ALERTS

FOR RELOADABLE CARDS

CC Studio News

People Choose Prepaid Because It Makes the Most Economic Sense for Them
10/26/15 2:50 pm

There are a variety of reasons for individuals to opt for an alternative financial service. Some people are simply barred from opening basic bank accounts or credit cards, either because of a poor credit score, a history of bouncing checks, or insufficient funds to maintain a minimum balance. To be sure, in the FDIC survey on the unbanked, 57.8 percent of unbanked households said they didn't "have enough money to keep in an account or meet a minimum balance."

Reloadable Cards

- Access Card
- TravelMoney Card

[Compare Access to TravelMoney](#)

Single Load Cards

- Gift Card
- Incentive Card

[Compare Gift to Incentive](#)

Selecting a Card

- Understand the Customer's Needs
- Select Matching Product

[Solution Guide](#)

Download our app

The first step in using CC Studio is going to the Convenient Cards launch page by going to www.convenientcards.com/CCstudio. It may be useful to create a shortcut on your desktop that takes you directly to this page. The launch page, as you will find, contains a large amount of useful information and material.

From the launch page, select CC studio login in the upper right corner of the screen. This will take you to the CC Studio login page. We recommend you begin at the launch page every time you log in. This link is the shortest way to get to the CC Studio log in page

Logging In

CONVENIENT CARDS

CC STUDIO

Welcome to CC studio IP: 216.19.248.46 Version: CM 4.03.03P65

Contact Us

User Name : BankEmployee

Access Code : *****|

Forgot Access Code

+ Login

To log into CC Studio, you will need your **username** and **access code** that have been provided to you. Enter your username & access code and click “login”.

IP: 216.19.248.46

Contact Us

User Name : BankEmployee

Click the “Contact Us” button above the login box if you need assistance logging in.

Introduction to CC Studio

Hide/Display Tabs

Search Quick Links

Alerts

Change Theme Color

Home

Check Card Balance

Sell Card

Manage Card

Load/Reload Card

Administration

Check Card Balance

Sell Card

Manage Card

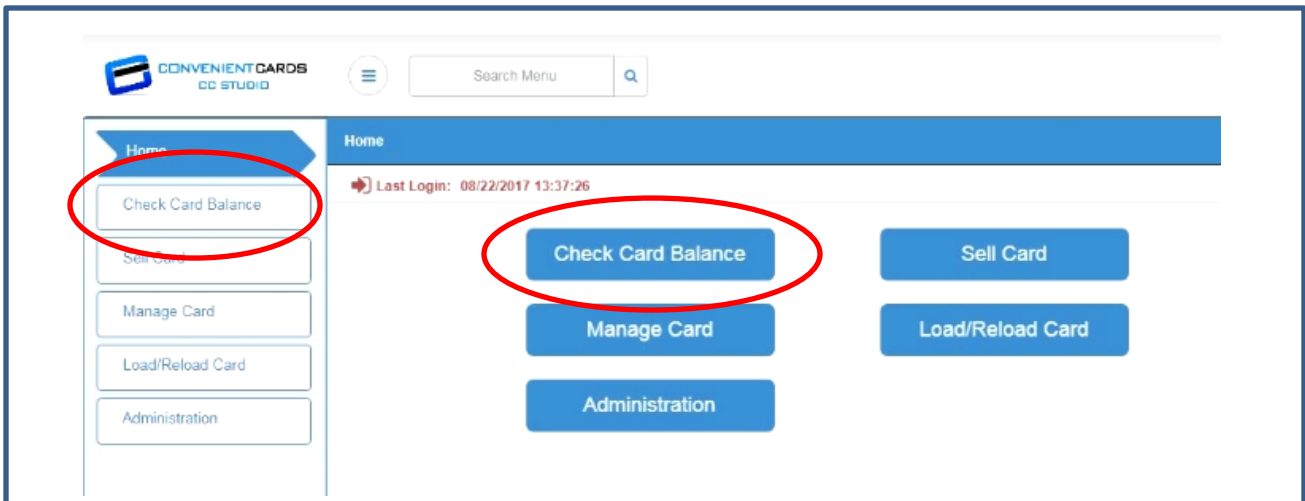
Load/Reload Card

Administration

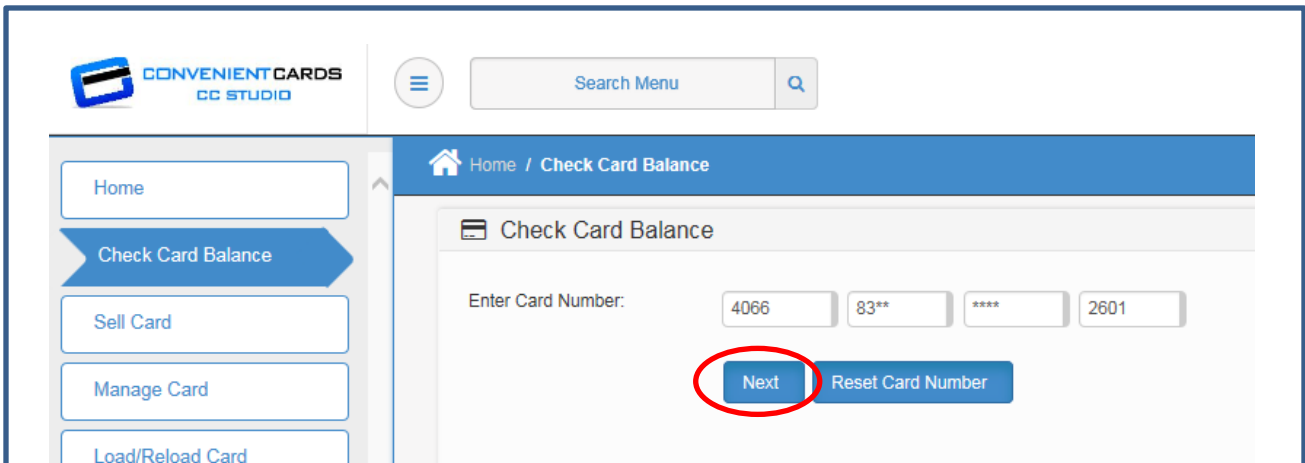
Convenient Cards, Inc.
Call: 1-800-899-5326
PREPAID CARDS

CONGRATULATIONS! You are now logged into CC Studio. This view is the "HOME" page view. You will see tabs on the left hand side of the page. These tabs are the most important part of CC studio. These tabs contain links for navigating CC Studio to perform functions like "Check Card Balance, Sell Card, Manage Card, Load/Reload Card and Administration." These links may also be found on the "HOME" tab view, shown here.

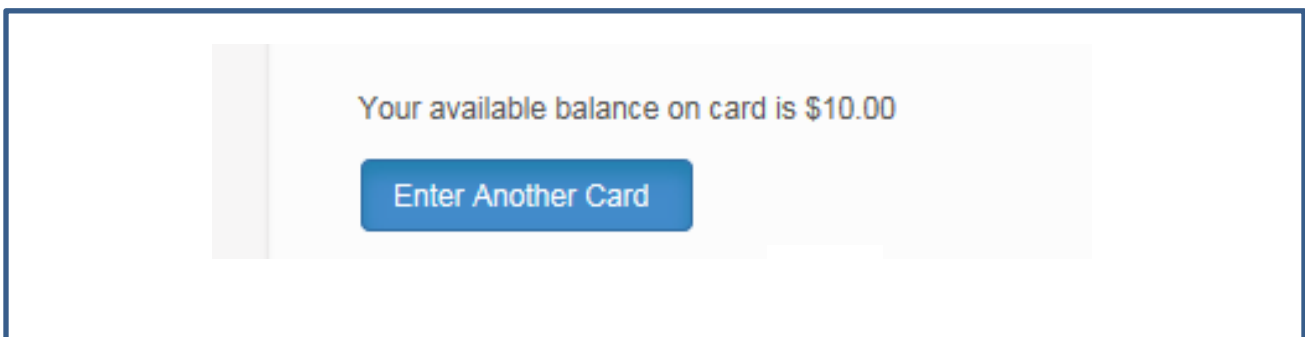
Checking Card Balance



To check a card balance, click the “Check Card Balance” tab on the sidebar on the left of the page or the “Check Card Balance” button in the middle of the “HOME” page.



You will then be prompted to enter a card number. Once you’ve entered the card number you may click “Next” to reveal the card balance.

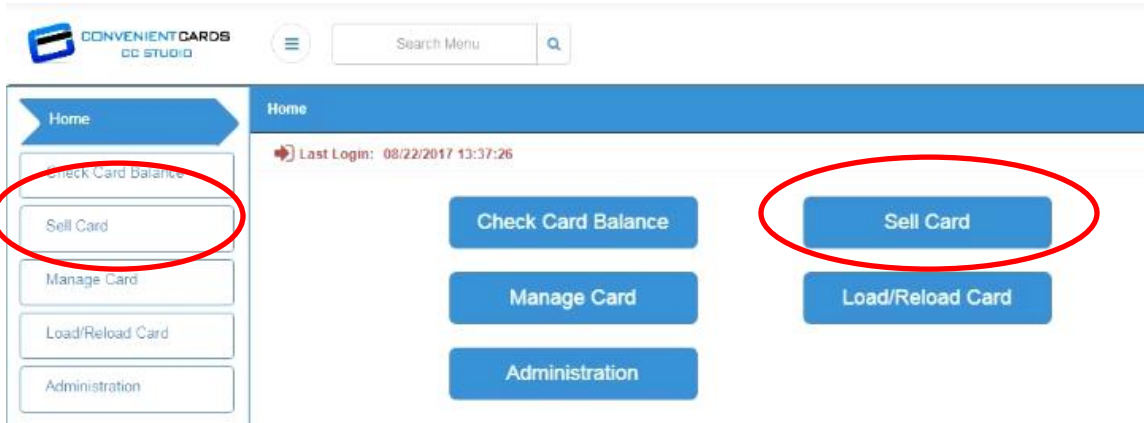


Your available balance on card is \$10.00

Enter Another Card

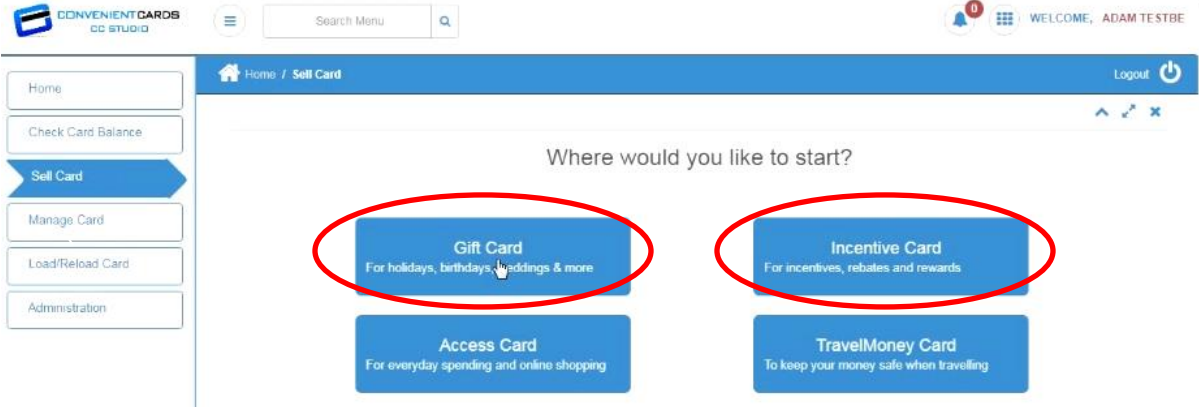
Selling Gift & Incentive

Activating and Loading a Single Gift/Incentive Card



The screenshot shows the 'Home' page of the Convenient Cards CC Studio. The left sidebar contains a menu with 'Sell Card' highlighted in red. The main content area features a 'Last Login' timestamp and four buttons: 'Check Card Balance', 'Sell Card' (highlighted in red), 'Manage Card', and 'Load/Reload Card'. Below these is an 'Administration' button.

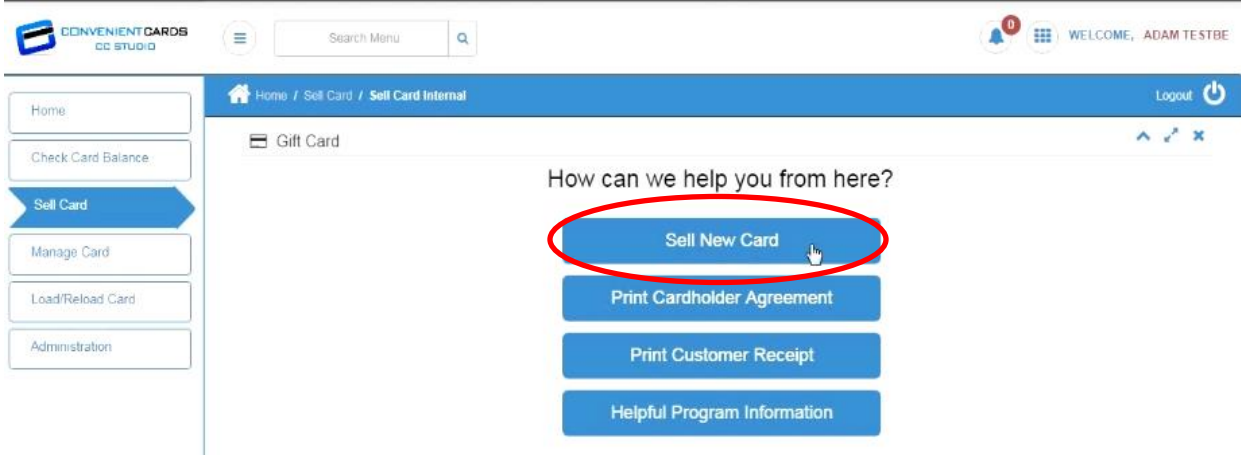
To sell a Gift Card or Incentive Card, click the “Sell Card” tab on the sidebar on the left of the page or the “Sell Card” button on the right of the “HOME” page.



The screenshot shows the 'Sell Card' page. The left sidebar has 'Sell Card' highlighted in blue. The main content area displays the heading 'Where would you like to start?' and four buttons: 'Gift Card' (highlighted in red, with subtext 'For holidays, birthdays, weddings & more'), 'Incentive Card' (highlighted in red, with subtext 'For incentives, rebates and rewards'), 'Access Card' (with subtext 'For everyday spending and online shopping'), and 'TravelMoney Card' (with subtext 'To keep your money safe when travelling').

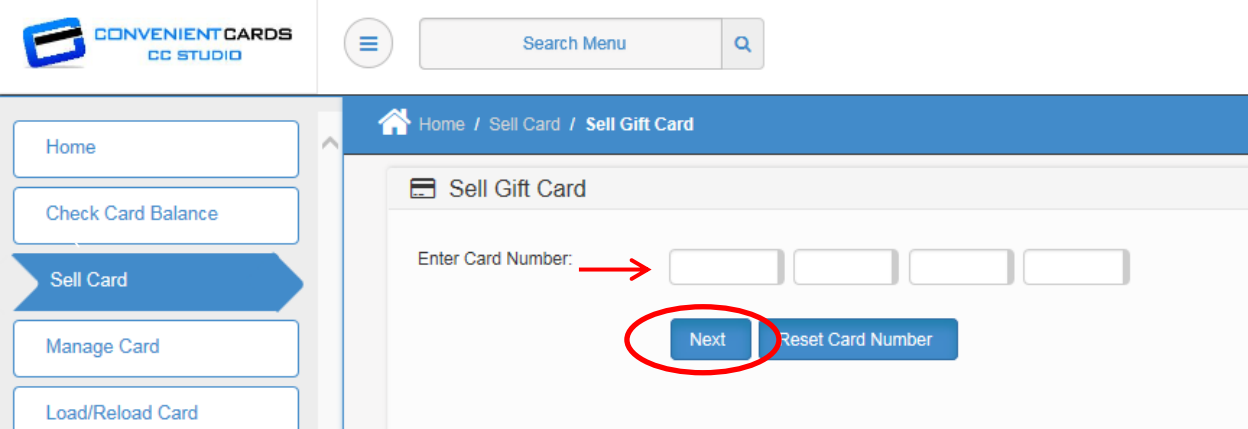
Here you may select “Gift Card” or “Incentive Card.”

Selling Gift & Incentive



The screenshot shows the 'Gift Card' page in the Convenient Cards CC Studio. The breadcrumb trail is 'Home / Sell Card / Sell Card Internal'. The page title is 'Gift Card'. Below the title, the text 'How can we help you from here?' is followed by four blue buttons: 'Sell New Card', 'Print Cardholder Agreement', 'Print Customer Receipt', and 'Helpful Program Information'. The 'Sell New Card' button is circled in red. The left sidebar contains links for Home, Check Card Balance, Sell Card (highlighted), Manage Card, Load/Reload Card, and Administration. The top navigation bar includes the logo, a search menu, and a user profile for 'WELCOME, ADAM TESTBE' with a 'Logout' button.

After selecting Gift Card or Incentive Card, we see links to Sell New Card, Print Cardholder Agreement, Print Customer Receipt, and Helpful Program Information. Click “Sell New Card” to sell a card.



The screenshot shows the 'Sell Gift Card' form in the Convenient Cards CC Studio. The breadcrumb trail is 'Home / Sell Card / Sell Gift Card'. The page title is 'Sell Gift Card'. Below the title, there is a form with the label 'Enter Card Number:' followed by four input fields. A red arrow points to the first input field. Below the input fields are two blue buttons: 'Next' and 'Reset Card Number'. The 'Next' button is circled in red. The left sidebar contains links for Home, Check Card Balance, Sell Card (highlighted), Manage Card, and Load/Reload Card. The top navigation bar includes the logo, a search menu, and a user profile for 'WELCOME, ADAM TESTBE' with a 'Logout' button.

You will then enter the card number that you would like to activate and load and click “Next.”

Selling Gift & Incentive

Home / Sell Card / Sell Gift Card Detail Logout

Sell Gift Card Detail

Card Detail

Branch / Store Name: Bank of Convenient Product Name: Convenient Visa Gift Card - NC

Card Number: 4066 83** **** 2643 Transaction Receipt Fee: \$ 3.95

Load Amount: \$ 50 Same Load Amount on all Cards

Add Reset Card Number

Edit	Delete	Card Number	Load Amount	Transaction Receipt Fee
Total Load Amount:			Total Transaction Receipt Fee Amount:	Total Due Amount:

Validate Reset

Enter Purchaser Information +

Submit Reset

You will then see the “Sell Gift Card/Incentive Card Detail” Page. You will notice that the required fields are noted with a highlighted right edge in red. The Branch/Store Name is already filled out with your bank information, as well as the card number (you just entered). Enter the amount you would like to load the card in the “Load Amount” field. The “Transaction Receipt Fee” field is strictly used to show your bank’s activate and load fee on your customer receipt. This is the amount you charge your customers for the purchase and activation of a Gift/Incentive Card. You will type in this determined fee amount set by your bank here. This amount is not deducted from the load amount nor is it debited from your bank’s funding account. Once you’ve entered in all the information, click “Add.”

Selling Gift & Incentive

The screenshot shows a web interface for adding a card. At the top, there are 'Add' and 'Reset Card Number' buttons. Below is a table with columns: Edit, Delete, Card Number, Load Amount, and Transaction Receipt Fee. A single row is visible with a green checkmark in the Edit column, a card number '406683*****2643', a load amount of '\$50.00', and a transaction receipt fee of '\$3.95'. Below the table is a summary bar with 'Total Load Amount: \$50.00', 'Total Transaction Receipt Fee Amount: \$3.95', and 'Total Due Amount: \$53.95'. There are 'Validate' and 'Reset' buttons below the summary bar. Below the summary bar is a section titled 'Enter Purchaser Information' with a plus icon. At the bottom, there are 'Submit' and 'Reset' buttons, with the 'Submit' button circled in red.

Review:

After you have clicked “Add” the card will be added to the table below the “Add” Button. For your convenience, you may **review** the Total Load Amount, Total Transaction Receipt Fee and Total Due Amount on the bottom of this section. The next step is to capture purchaser information. As this step is optional, you may choose to continue without adding purchaser information by selecting “Submit” once you have reviewed the transaction totals.

This is a close-up of the 'Enter Purchaser Information' section. It shows a light gray bar with the text 'Enter Purchaser Information' and a plus icon on the right. The plus icon is circled in red. Below the bar are 'Submit' and 'Reset' buttons.

OPTIONAL - For BSA tracking, you may capture Gift/Incentive Card Purchaser information. Expand the “Enter Purchaser Information” section to enter in Card purchaser information to retain for your records.

Selling Gift & Incentive

Home / Sell Card / Sell Gift Card Detail Logout

Enter Purchaser Information Search

Personal Information

Purchaser Member ID:

Date of Sell:

First Name:

Middle Name:

Last Name:

Date of Birth:

Address Line 1:

Address Line 2:

Country:

State:

City:

Zip Code:

ID's Information

Social Security Number:

Driving License Number:

Driving License Issue Date:

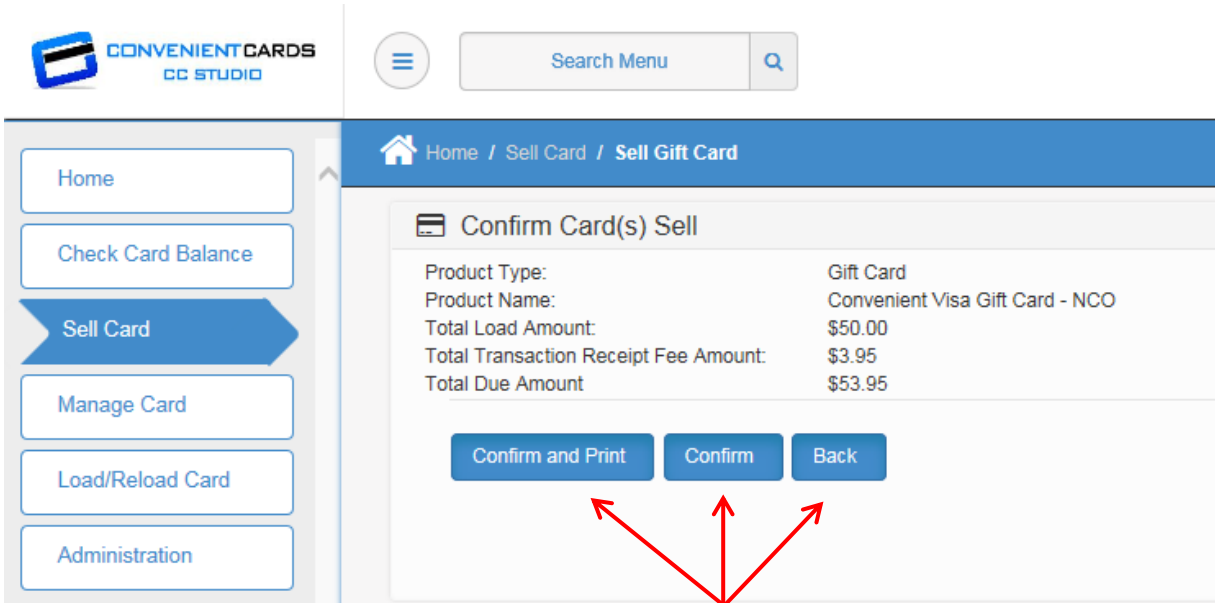
Driving License Expiration Date:

Driving License Issued Country:

Driving License Issue State:

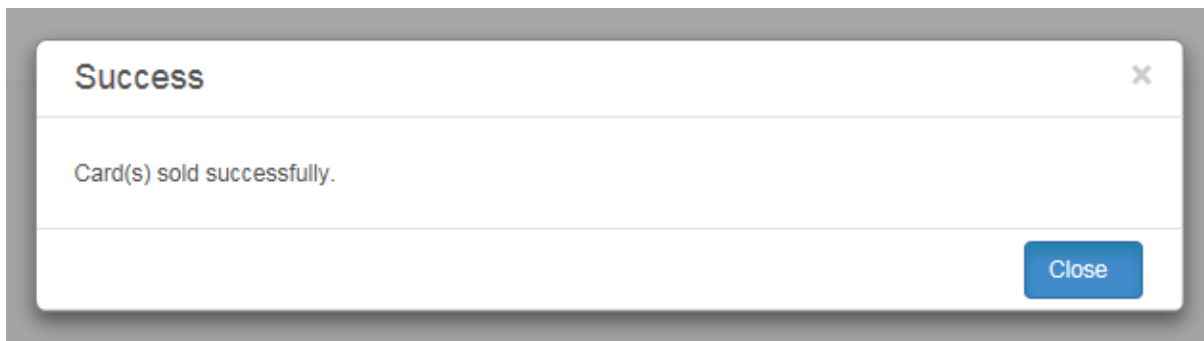
Here you may enter in “Purchaser Member ID, Date of Sale, Purchaser Name, Purchaser Date of Birth,” and “Purchaser Address” including “State, City” and “Zip Code.” For more specific record retention, you also have the ability to capture the purchaser “Social Security Number, Driving License Number, Driving License Issue Date, Driving License Expiration Date, Driving License Country,” and “Driving License State”. This information is purely optional and to be used by your bank for internal tracking of gift card purchasers. The information captured here, is only used for your bank and does not personalize the card at the time of purchase. Once you are finished, select “Submit.”

Selling Gift & Incentive



You now see a screen in which you may select “Confirm and Print” or “Confirm” to finalize the transaction. If you would like a receipt, be sure to select “Confirm and Print.” Selecting the “Back” button available here, allows you to make any corrections to your card transaction.

Once “Confirm and Print” or “Confirm” is selected, the card will be activated and loaded.



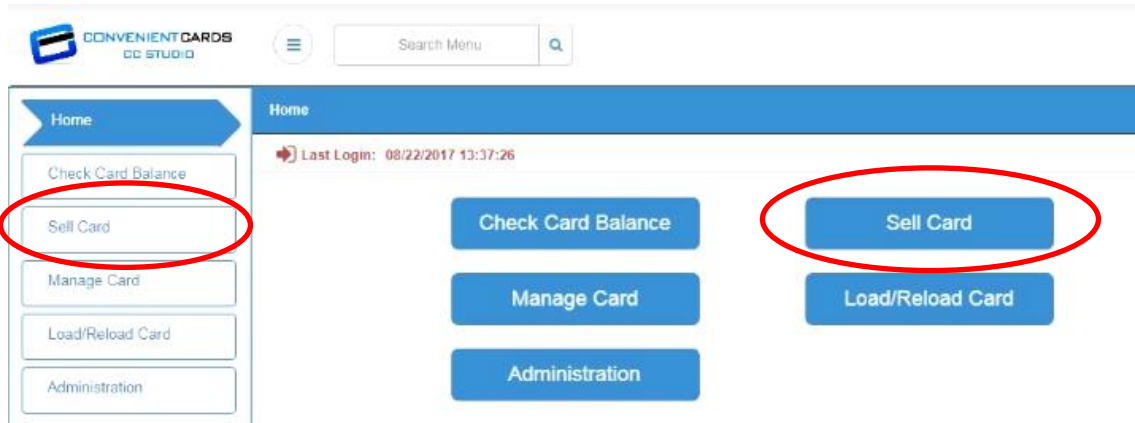
Selling Gift & Incentive

Activating and Loading Multiple Gift/Incentive Cards in Same Transaction

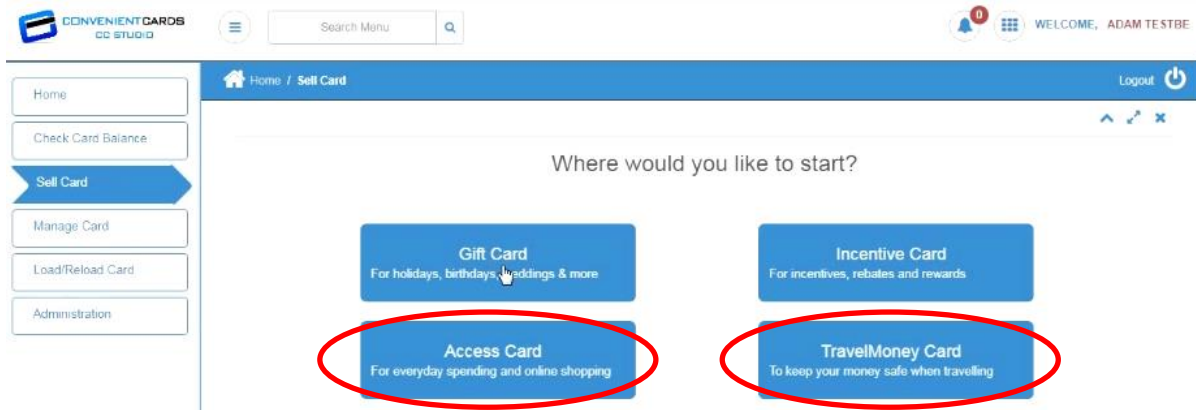
Once you have entered in your first card and selected “Add” you will see it displayed in the table below the “Add” button. To add another card in the same transaction, simply enter in a new card number and enter in your load amount. Once you have done this click “Add”.

Your additional card will be added to the table. You may repeat this step to add however many additional cards you would like to activate and load. Next, you will click “Validate”. Validation is used as a double check for you to review the card loads and fees, as well for our system to confirm that the cards are valid and ready to be sold. If they are valid, you will see a green check in the edit column. Once you have validated the transaction you may now click “Submit”. Again, you will have the option to “Confirm” or “Confirm and Print” to finalize the transaction, or “Back” to review transaction details.

Selling Access & TravelMoney

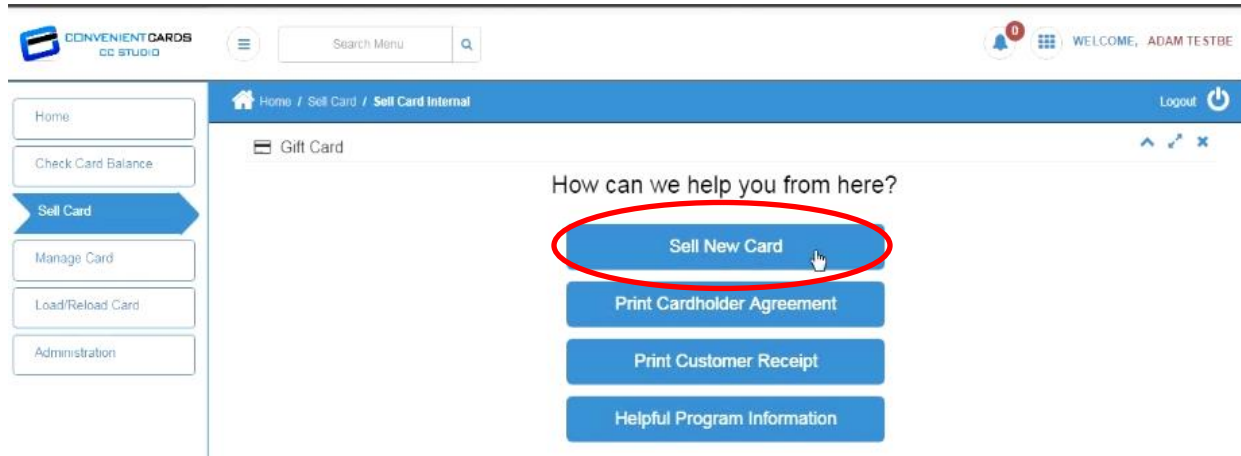


To sell an Access or TravelMoney Card, click the “Sell Card” tab on the sidebar on the left of the page or the “Sell Card” button on the right of the “HOME” page.

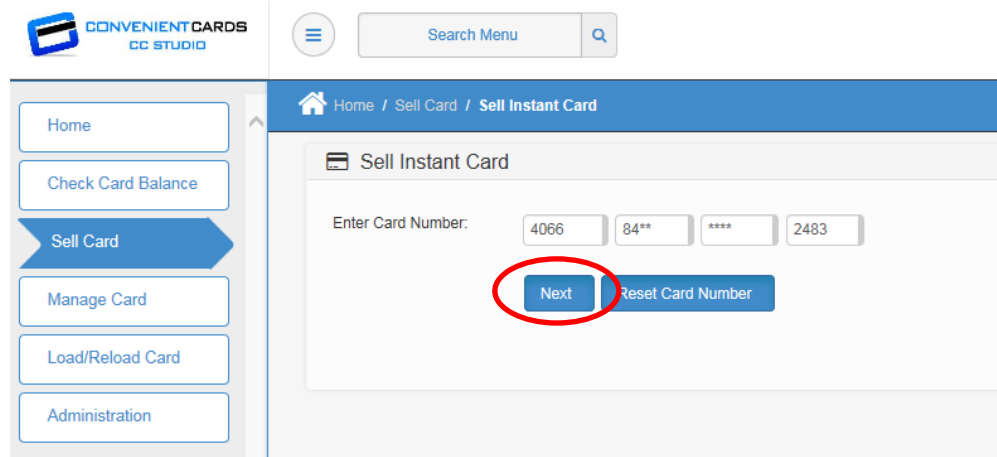


Here you may select “Access Card” or “TravelMoney Card”.

Selling Access & TravelMoney



After selecting Access Card or TravelMoney Card, we see links to Sell New Card, Print Cardholder Agreement, Print Customer Receipt, and Helpful Program Information. Click “Sell New Card” to sell a card.



You will then enter the card number that you would like to activate and load and click “Next”.

Selling Access & TravelMoney

The screenshot shows a web form titled "Sell Instant Card" with a blue header bar containing "Home / Sell Card / Sell Instant Card" and a "Logout" button. The form is divided into several sections:

- Program Information:** Client Name: Bank Programs; Product Name: Convenient Access Visa Prepaid Card - NCO; Card Number: 406684****2483; Branch / Store Name: Bank of Convenient; Branch Code / Store ID: 031708; Card Manual Status: New Card Pending Activation.
- Cardholder Information:** Load Amount: \$ 50; Total Due Amount: \$ 53.95; Transaction Receipt Fee: \$ 3.95.
- Personal Information:** First Name: John; Last Name: Smith; Name On Card: John Smith; Date of Birth: 01/01/1901.
- Address Information:** Address Line 1: One Monarch Place Ste 240; Address Line 2: (empty); Country: United States; State: Massachusetts; City: Springfield; Zip Code: 01144.
- Shipping Address Information:** Shipping Address: Ship to Cardholder Address (checked); First Name: John; Middle Name: (empty); Last Name: Smith; Address Line 1: One Monarch Place Ste 240; Address Line 2: (empty); City: Springfield; Zip Code: 01144.

Red arrows point to the Load Amount, Transaction Receipt Fee, First Name, Last Name, Date of Birth, Social Security Number, Address Line 1, Country, State, City, and Zip Code fields.

Enter in the desired "Load Amount" under Cardholder Information. The "Transaction Receipt Fee" field is strictly used to show your bank's activate and load fee on your customer receipt. This is the amount you charge your customers for the purchase and activation of a Access/TravelMoney Card. You will type in this determined fee amount set by your bank here. This amount is not deducted from the load amount nor is it debited from your bank's funding account. Under Personal Information, enter in the required information which is highlighted on the right of the field in red. This information is "First Name, Last Name, Date of Birth, and Social Security Number". Note that the "Name on Card" field automatically populates with the cardholders name you have entered. Next, the Address Information requires a physical "Address, Country, State, City, and Zip Code".

Selling Access & TravelMoney

Home / Sell Card / Sell Instant Card Logout

Name On Card:

Date of Birth:

Address Information

Address Line 1:

Address Line 2:

Country:

State:

City:

Zip Code:

Shipping Address Information

Shipping Address:

First Name:

Middle Name:

Last Name:

Address Line 1:

Address Line 2:

City:

Zip Code:

Country:

State:

Contact Information

Home Phone Number:

Work Phone Number:

Mobile Number:

Note: Home Phone Number Or Work Phone Number Or Mobile Number is mandatory

Primary Email Address:

Buttons:

Annotations: Red arrows point to the 'Ship to Other Address' dropdown, the 'Home Phone Number' field, the 'Primary Email Address' field (labeled 'For Customer Service'), and the 'Submit' button.

If the cardholder has a different Shipping Address than their physical address, you may fill out additional shipping information in the “Shipping Address Information” section by selecting “Ship to Other Address” in the drop down. After you have entered this information you will then be required to enter in at least one phone number below. Any additional information including email address will be used only for customer service purposes. Once you’ve entered all the information, and confirmed that you have filled out all required fields, you will hit “Submit” to finalize the transaction.

Selling Access & TravelMoney

Home / Sell Card / Sell Instant Card

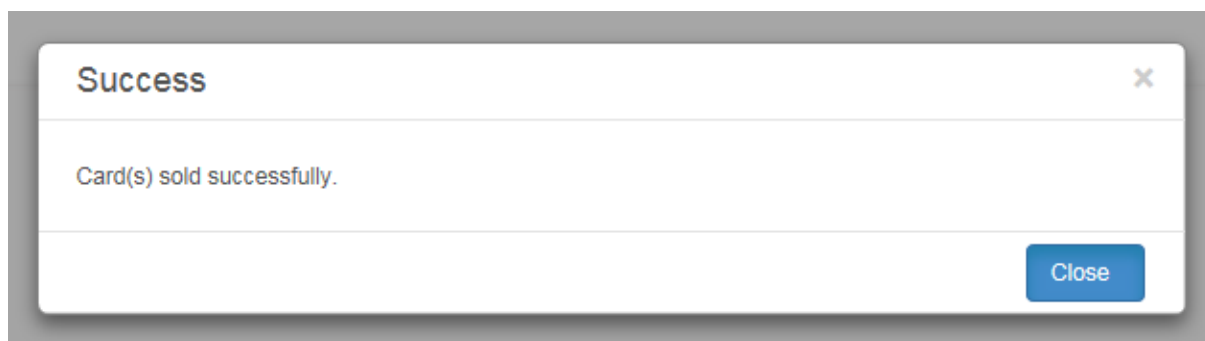
Confirm Card Sell

Card Number:	406684*****2483
Product Type:	Access Card
Product Name:	Convenient Access Visa Prepaid Card - NCO
Transaction Receipt Fee:	\$3.95
Deposit Amount:	\$50
Total Due Amount:	\$53.95

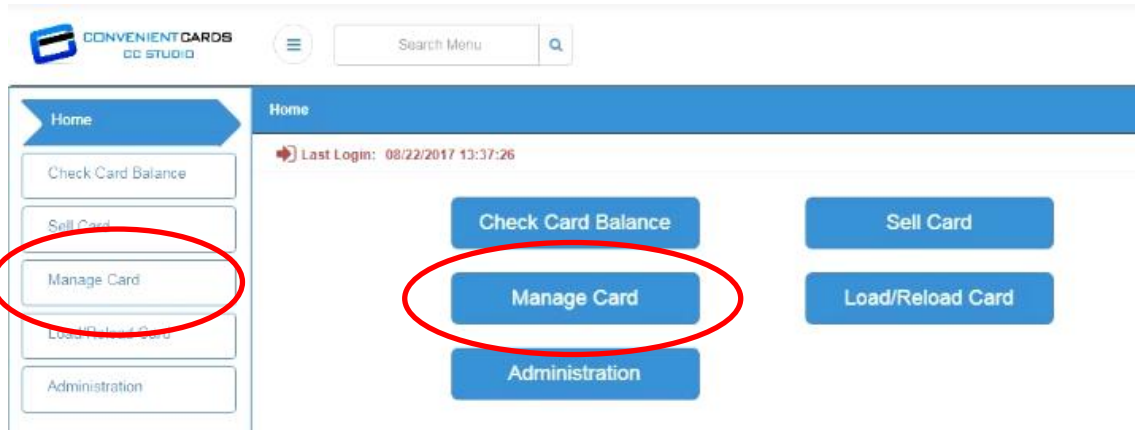
[Confirm And Print](#) [Confirm](#) [Enter Another Card](#) [Back](#)

On this page, press “Confirm and Print” to complete the transaction and print receipt. If a receipt is not needed you may simply press “Confirm”. If you click “Enter Another Card” you will cancel your current transaction and the system will let you activate and load a new card. If you need to make any revisions to the information displayed here before you confirm, you may hit the “Back” button to make those corrections.

Once “Confirm and Print” or “Confirm” is selected, the card will be activated and loaded.



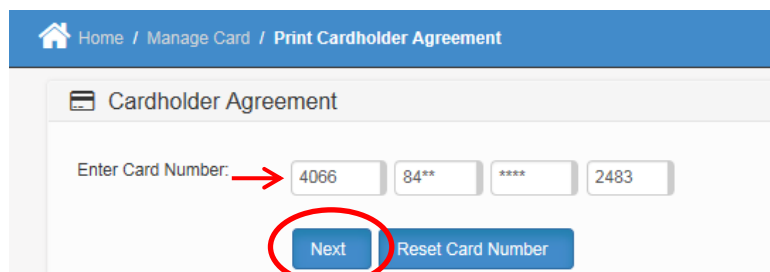
Manage Card



The “Manage Card” tab pulls up a menu of card options for the program. Select the “Manage Card” tab on the left or the “Manage Card” button in the middle of the “HOME” page.



You will find two options under Manage Card, “Print Cardholder Agreement” and “Print Customer Receipt”. To print a Cardholder Agreement for any card within the program, select “Print Cardholder Agreement.”



You will see the “Enter Card Number” field. Enter in the card number you would like to receive the cardholder agreement for, and click “Next.”

Manage Card

Home / Manage Card / Print Cardholder Agreement Logout

Cardholder Agreement

Cardholder Information

Card Number:	406684*****2483	Client Name:	Bank Programs
Card Expiration Date:		Branch / Store Name:	Bank of Convenient
Card Type:	Primary	Branch Code / Store ID:	031708
Account Number:	70000000103205	Product Name:	Convenient Access Visa Prepaid Card - NCO
Card Manual Status:	Active	First Name:	
Card Derived Status:	Pending Activation	Last Name:	
Card Generated Status:	Active		
Account Manual Status:	Active		
Account Generated Status:	Active		

[Print Cardholder Agreement](#)

You will then see the Cardholder Information screen showing the card information on the card you are looking up the Cardholder Agreement. To download a printable PDF of the cardholder agreement you will click “Print Cardholder Agreement”.

A confirmation should pop up asking if you would like to print the agreement. Select “Yes” to start the download.

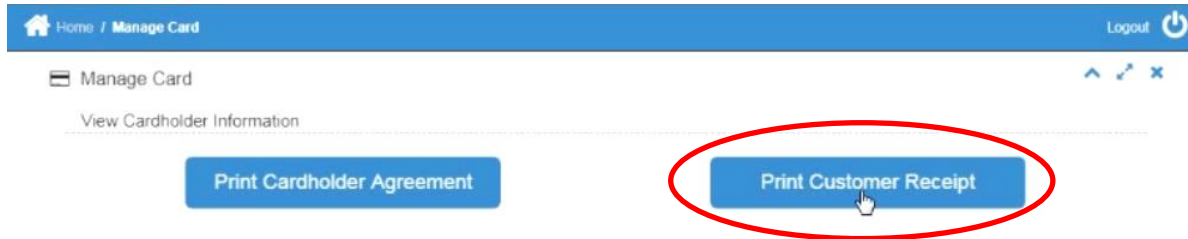
Confirm

Would you like to print cardholder agreement?

[Yes](#) [No](#)

Once your PDF has downloaded, you may open it for printing.

Manage Card



Back under your Manage Card option we will now select “Print Customer Receipt”.

The screenshot shows the 'Print Customer Receipt' search screen. The header includes 'Home / Manage Card / Customer Receipt' and a 'Logout' button. The main section is titled 'Print Customer Receipt' and contains a 'Search Transaction' section. The search criteria include: 'Sell From Date' (MM/DD/YYYY), 'Sell To Date' (MM/DD/YYYY), 'Receipt Id', 'Transaction Type' (Both), 'Purchaser Member ID', 'Purchaser First Name', 'Purchaser Last Name', 'Account Number' (70000000103205), and 'Card Number' (4066, 84**, ****, 2483). There are also fields for 'Cardholder First Name' and 'Cardholder Last Name'. At the bottom, there are two buttons: 'Next' (circled in red) and 'Reset Card Number'.

In the Search Transaction screen you will see that you may search for a previous transaction receipt by selecting from the search criteria available. These include: “Date, Receipt ID, Transaction Type, Purchaser Member ID, Purchaser First Name, Purchaser Last Name, Account Number, Card Number, Cardholder First Name, and Cardholder Last Name”. Once you have filled out the criteria you are looking for, click “Next” to start your search.

Manage Card

Home / Manage Card / Customer Receipt Logout

Print Customer Receipt


Date	Time	Product Name	Transaction Type	User Name	Amount Loaded	Transaction Receipt Fee	Receipt ID	Detail
08/30/2017	10:41:51 AM	Convenient Visa Gift Card - GC155	Load	Dorina.CC Admin	\$150.00	\$0.00	3684	Detail
08/30/2017	10:40:16 AM	Convenient Visa Gift Card - GC155	Load	Dorina.CC Admin	\$10.00	\$0.00	3683	Detail
08/30/2017	10:05:04 AM	Convenient Visa Gift Card - NCO	Sell	Adam TestBE	\$50.00	\$3.95	3680	Detail
08/30/2017	09:57:29 AM	Convenient Access Visa Prepaid Card - NCO	Load	Rishabh BankAdmin	\$9.90	\$4.95	3669	Detail
08/30/2017	09:47:16 AM	Convenient Visa Gift Card - NCO	Load	Dorina.CC Admin	\$10.00	\$1.00	3668	Detail
08/30/2017	09:44:17 AM	Convenient Visa Gift Card - GC155	Sell	Dorina.CC Admin	\$350.00	\$0.00	3673	Detail
08/30/2017	07:59:14 AM	Convenient Visa Gift Card - NCO	Load	Dorina.CC Admin	\$222.00	\$1.00	3666	Detail
08/30/2017	07:41:26 AM	Convenient Visa Gift Card - NCO	Sell	Dorina.CC Admin	\$222.00	\$2.00	3664	Detail
08/30/2017	06:16:15 AM	Convenient Access Visa Prepaid Card - NCO	Load	Dorina.CC Admin	\$21.21	\$0.00	3670	Detail
08/30/2017	06:13:38 AM	Convenient Visa Gift Card - NCO	Sell	Dorina.CC Admin	\$10.00	\$0.00	3661	Detail

1 2 3 4 5 6 7 8 9 10 ...

Now you have a screen that shows a summary of transactions that fit your selected search criteria. When you find the transaction receipt that you would like to print, click “Detail” for a customer receipt. The receipt will open in a window with an option to “Print” or “Export to PDF”.

CoreMoney

Customer Transaction Receipt


August 23, 2017 10:53 AM

Transaction Information
 Order ID: 9126
 Location: Springfield, MA
 Processed By: Adam David

Type of Card: Convenient Corporate World Visa Prepaid Card - CC InHouse

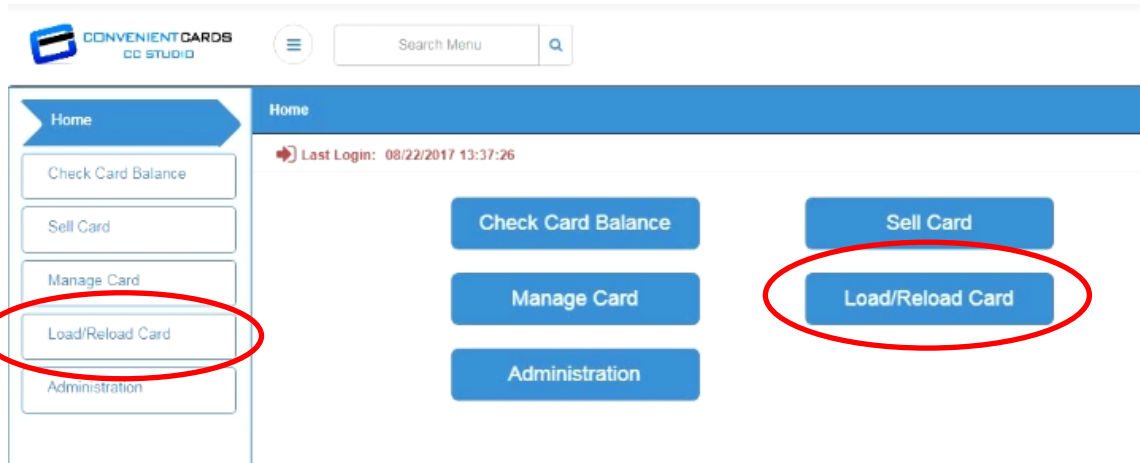
Account Number	Card Number	Transaction ID	Load Amount	Transaction Receipt Fee	Total Due Amount
700000000008651	406685****0082	1467380568	\$10.00	\$0.00	\$10.00

Connect with us:
[@ConvenientCards](#) [Convenient Cards, Inc](#)

Print Export To PDF

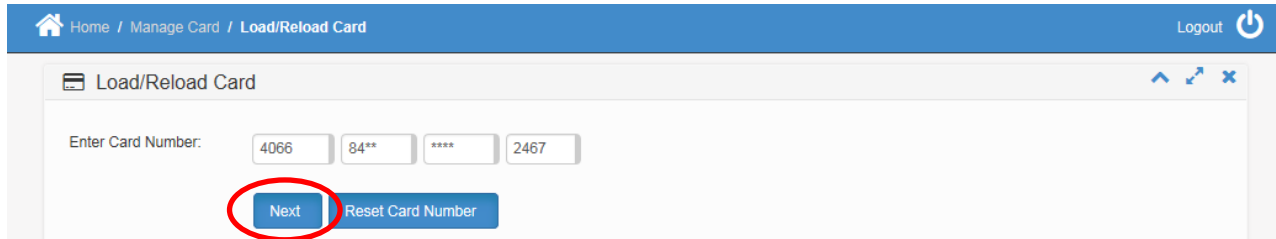
The receipt will open in a window with an option to “Print” or “Export to PDF”.

Load & Reload Card



*****DO NOT USE THIS OPTION TO ACTIVATE AND LOAD (SELL) GIFT AND INCENTIVE CARDS*****

To Load/Reload, click the “Load/Reload Card” tab on the sidebar on the left of the page or the “Load/Reload Card” button in the right of the “HOME” page. This screen should only be used for reloadable products.



You are now taken to the “Enter Card Number” screen. Here, you may enter in the card number of the Access or TravelMoney card you would like to reload and click “Next”.

Load & Reload Card

Home / Manage Card / Load/Reload Card Logout

Load/Reload Card Detail

Cardholder Information

Card Number:	406684****2467	Client Name:	Bank Programs
Card Expiration Date:	6/30/2021 12:00:00 AM	Branch / Store Name:	Bank of Convenient
Card Type:	Primary	Branch Code / Store ID:	031708
Account Number:	70000000103189	Product Name:	Convenient Access Visa Prepaid Card - NCO
Card Derived Status:	Lost	First Name:	John
Available Balance:	\$104.10	Last Name:	Smith

Enter Load Detail

Enter Load Amount: Transaction Receipt Fee:

Last Five Loads

Select	Transaction Date/Time	Transaction Description	Transaction Amount	Transaction Receipt Fee	Total Due Amount	Current Balance	Transaction Source	UserID	Partner Store Name	Receipt
<input type="radio"/>	08/22/2017 17:30:26	1379 - Sell Card Load	\$100.00	\$4.95	\$104.95	\$107.05	CoreMoney	iBankEmployee	Bank of Convenient (Springfield, MA)	3532

On this page, you will see the “Load/Reload Card Detail”. Displayed here is a summary of cardholder information on the card you have entered to reload. Double check you are reloading the correct card.

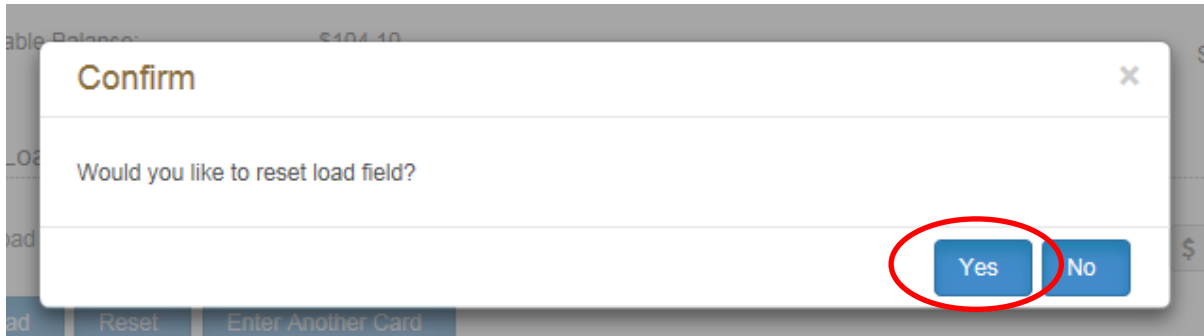
Under the “Enter Load Detail” section, you will enter the amount to be reloaded on the card in the “Enter Load Amount” field. CC Studio will automatically debit this reload amount, plus \$3.95 for each reload transaction.

As the bank may retain up to an additional \$1.00 per reload, you have the option of entering an amount between \$3.95 - \$4.95 in the “Transaction Receipt Fee” field. The “Transaction Receipt Fee” field is strictly used to **display** the Reload Fee on your customer receipt printout. This will allow you to show the correct fee amount assessed for the transaction on your customer receipt.

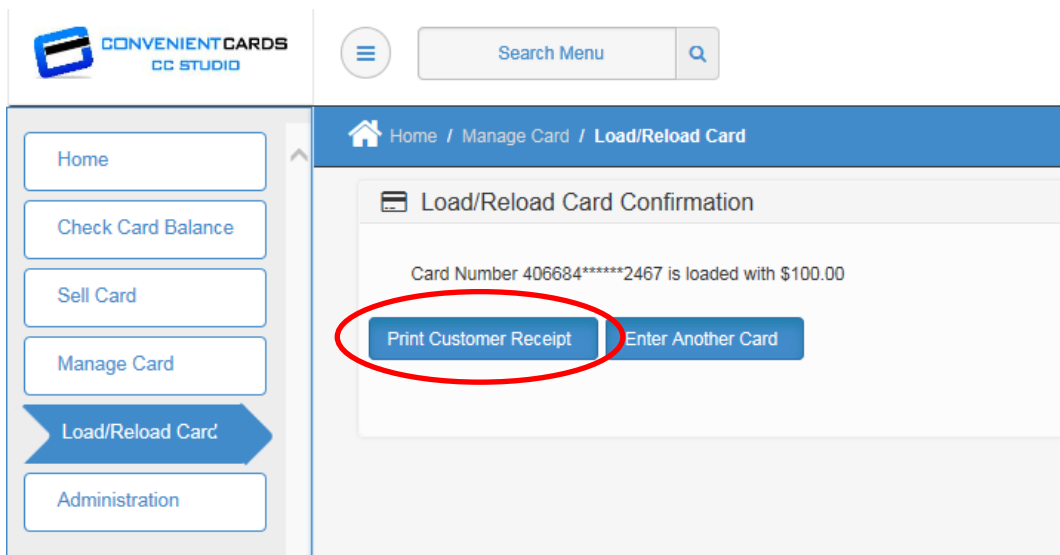
IMPORTANT The amount entered in the “Transaction Receipt Fee” will **not** be deducted from the load amount, nor is it used to determine the total debit from your bank’s funding account for the transaction.

Once you have entered in the information in the two fields, you may press “Load”.

Load & Reload Card

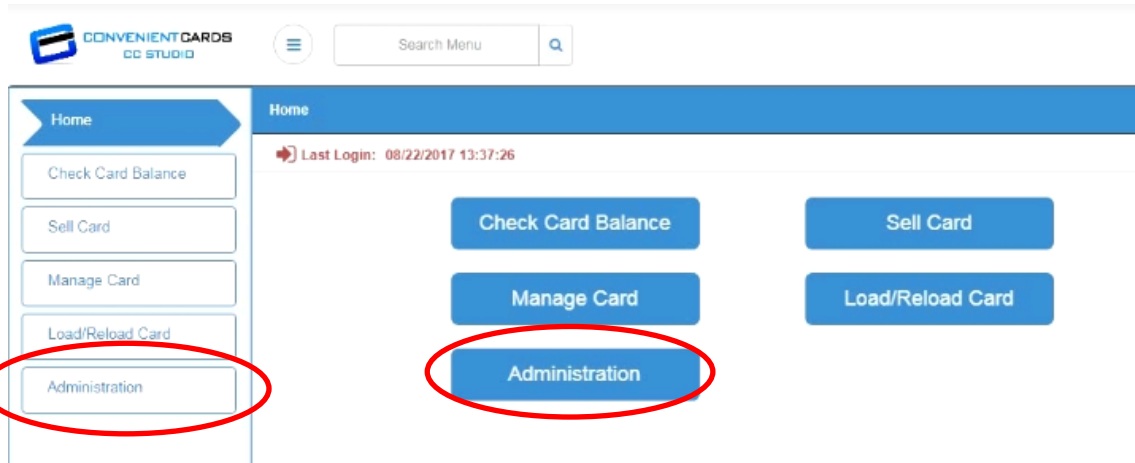


Now, you may confirm that you would like to complete the reload transaction by pressing “Yes” on the window that pops up.

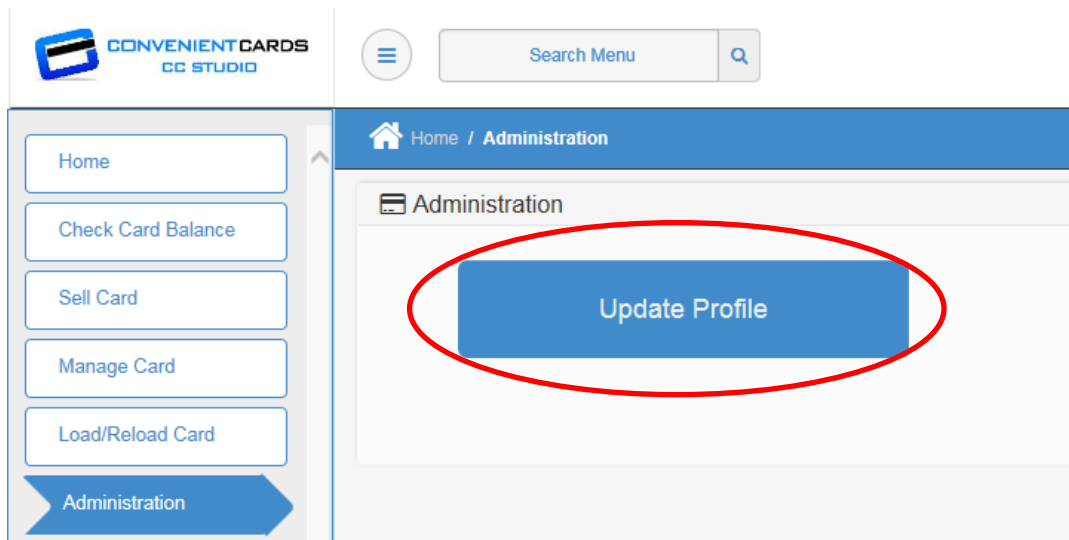


Once you have confirmed the transaction, you will receive a “Load/Reload Card Confirmation” displaying the masked card number and the reload amount. You may select “Print Customer Receipt” to print a receipt of the transaction, or “Enter Another Card” to complete a reload to a different customer card.

Updating Profile

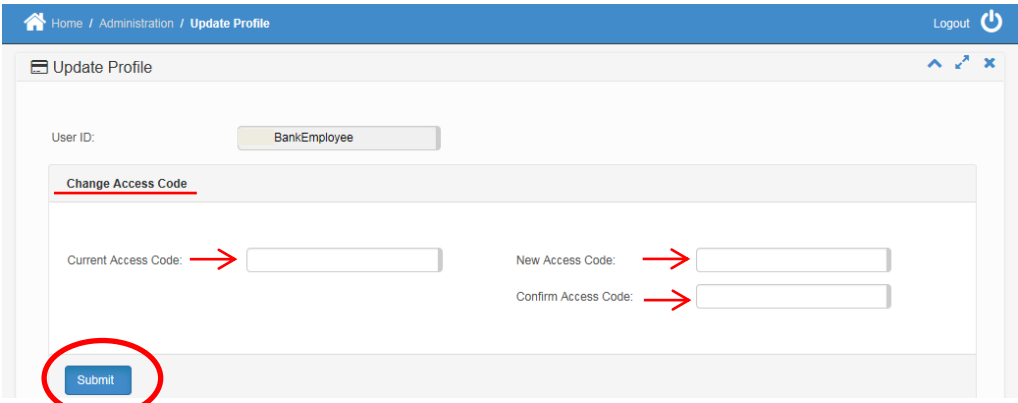


Let us check out the “Administration” tab. Click the “Administration” tab on the sidebar on the left of the page or the “Administration” button in the middle of the “HOME” page.



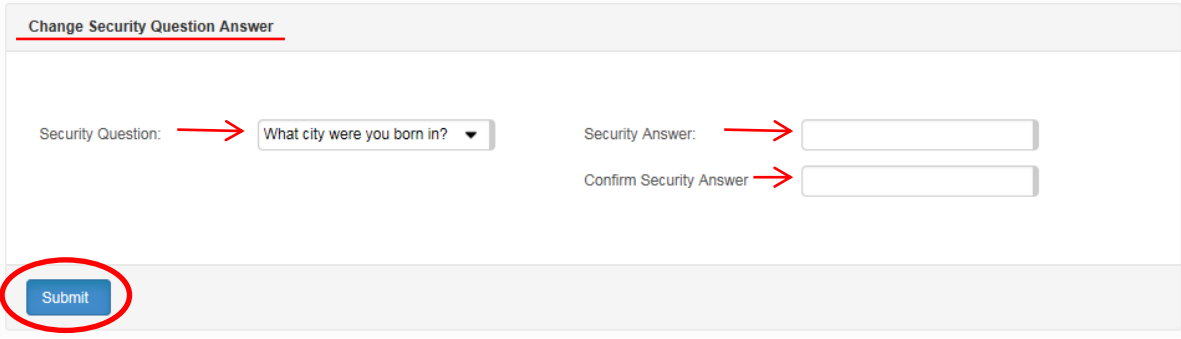
Under the Administration tab there is one option: “Update Profile”. Select “Update Profile” to change your Access Code (Password), Security Answer, and Date of Birth/E-mail.

Updating Profile



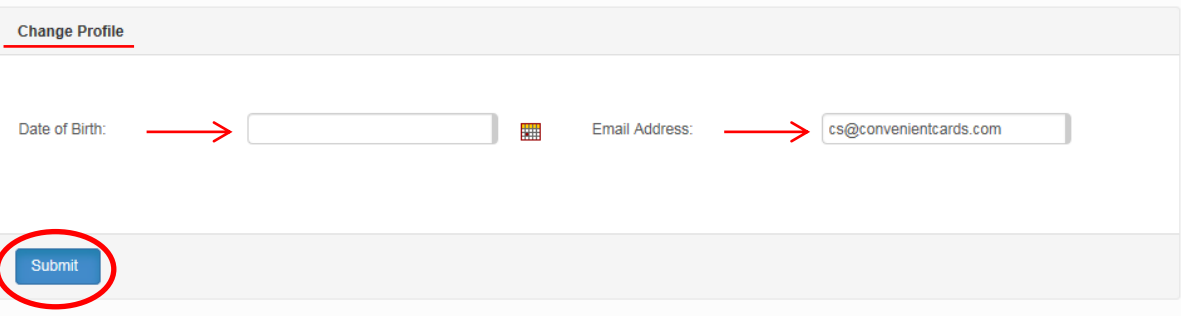
The screenshot shows the 'Update Profile' page with a blue header containing 'Home / Administration / Update Profile' and a 'Logout' button. The main content area is titled 'Update Profile' and shows a 'User ID' field with the value 'BankEmployee'. Below this is a section titled 'Change Access Code' with three input fields: 'Current Access Code', 'New Access Code', and 'Confirm Access Code'. Red arrows point to each of these fields. A blue 'Submit' button is circled in red at the bottom left of the section.

“Change Access Code” is used to change your password you use to sign in to CC Studio. Type in your current password followed by your new password, and again to confirm. Click “Submit” to save your changes.



The screenshot shows the 'Change Security Question Answer' section. It features a 'Security Question' dropdown menu with the text 'What city were you born in?' and a 'Security Answer' input field. Below these are 'Confirm Security Answer' and another 'Submit' button, both circled in red. Red arrows point to the dropdown and the answer input field.

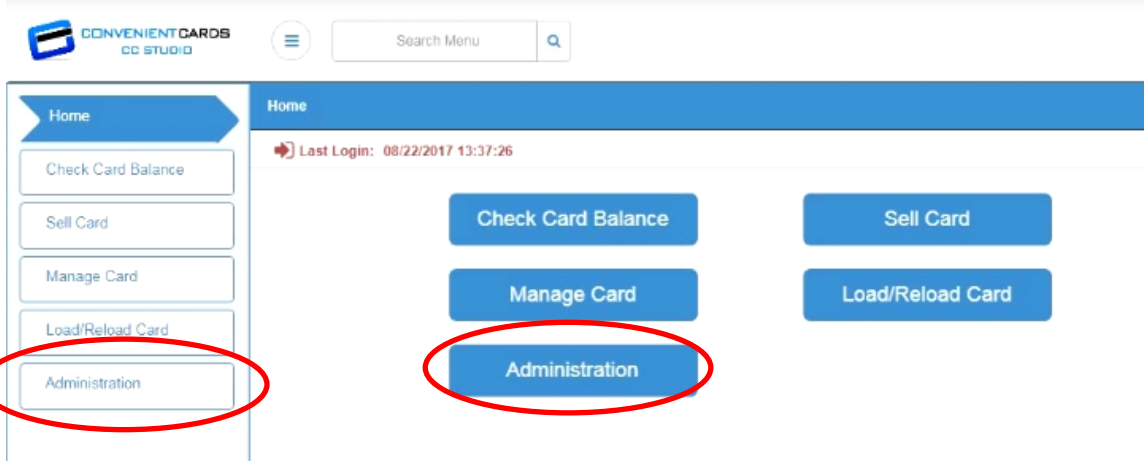
“Change Security Question Answer” will be used for password recovery. Select a security question from the drop down and enter in your answer to the question. Confirm your answer and click “Submit” to save your changes.



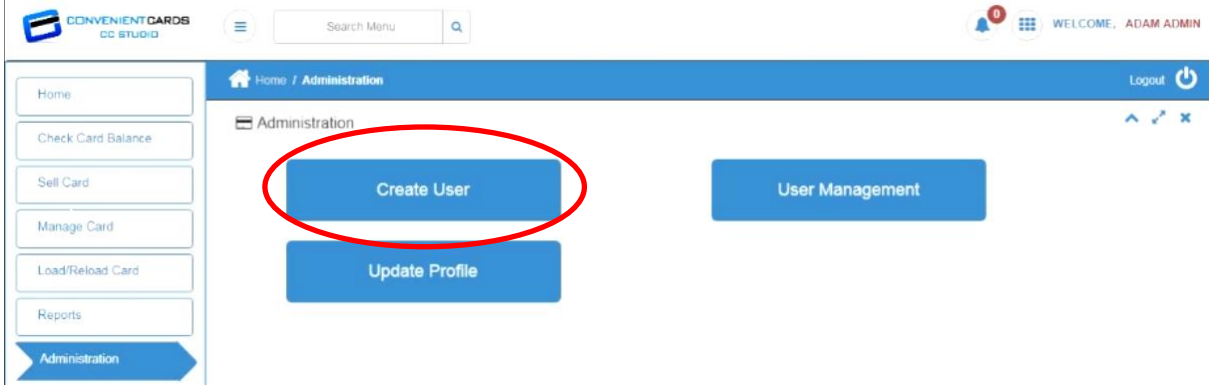
The screenshot shows the 'Change Profile' section with two input fields: 'Date of Birth' and 'Email Address'. The 'Email Address' field contains the text 'cs@convenientcards.com'. A blue 'Submit' button is circled in red at the bottom left of the section. Red arrows point to the 'Date of Birth' and 'Email Address' fields.

Last, in the Change Profile section you may enter in your “Date of Birth” and “Email Address”. Click “Submit” to save your changes. Information stored in this section will become useful for verification purposes.

Bank Admin Role



Let us check out the “Administration” tab for a Bank Admin Role user. Click the “Administration” tab on the sidebar on the left of the page or the “Administration” button in the middle of the “HOME” page.



If you are a Bank Admin, you will have two more options in the Administration tab. “Create User” and “User Management” will be available for you. Click “Create User” to add a new user.

Bank Admin Role

The screenshot shows the 'Create User' form in CC Studio. The form is titled 'Create User' and has a breadcrumb trail 'Home / Administration / Create User'. The 'User Role' dropdown is set to 'Bank Employee'. The 'Branches' section has 'Service Branch' set to 'Convenient Cards, Inc. (CC0001)' and 'User Branch' set to 'Bank of Convenient'. The 'First Name' field contains 'John' and the 'Last Name' field contains 'Smith'. The 'User ID' field contains 'jsmith2'. The 'Generated Access Code' field displays '(Access Code Appears Here)'. The 'Email Address' field is empty and labeled 'Optional'. The 'Date of Birth' field is empty and labeled 'Optional' with a calendar icon. The 'Daily Load Limit' field is empty and labeled 'Optional'. The 'Check To Bypass IP Address' checkbox is checked. The 'IP Address' field is empty and labeled 'Optional' with the note '(IP Address separated by comma(,))'. A blue 'Submit' button is circled in red.

First, select the “User Role” in the dropdown. As a Bank Admin role, you will be able to create new Bank Employees and other Bank Admins. The “Service Branch” drop down **MUST** be set to “Convenient Cards Inc (CC0001)”. The “User Branch” dropdown **MUST** be set to your bank name. **Do NOT** assign a user to an individual branch. Your users will need to be assigned to your bank name in order to perform transactions in CC Studio. Users assigned to a branch will not function correctly in CC Studio. Enter in the new user’s “First Name, Last Name” and create a unique “User ID”.

The remaining fields are optional. You may include including a user’s “Email Address”, set a user to a “Daily Load Limit” or restrict login and system access to a specific “IP Address”. The “Daily Load Limit” will restrict that user’s total card loads per day to a specific dollar amount entered in this field. The “IP Address” restricts the user’s system access to the IP address entered. When “Check To Bypass IP Address” is checked, the IP address restriction will be ignored allowing that user to access CC Studio from any IP address.

Once you press “Submit”, the user is created and their temporary access code displays in the “Generated Access Code” Field.