CMS New - Bulk Card Order

Training Guide

First Data
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Bulk Card Orders

Introduction

Card Management System (CMS) is a browser-based application used for the Open Loop Prepaid platform access. CMS is accessible from Internet-connected locations, using standard browser software; Internet Explorer 8.0 and above, Firefox, Safari and Chrome. Navigation and data entry in CMS is through familiar web links, form fields and controls.

Clients are granted access by supplying their Implementations Manager with secure terminal IP addresses, which allows us to recognize your terminal behind the firewall for Multi Factor Authentication.

This Guide describes one component of the CMS environment, the Bulk Card Order application.

Target Audience

Payroll and HR personnel

Course Objectives

This course will prepare you to:

- Order New Instant Issue Welcome Packets in CMS Bulk
- Order New Personalized Cards using Layout in CMS Bulk
Accessing CMS

1. Open your browser. First Data requires the use of Microsoft® Internet Explorer 8.0 or above. Some versions of Firefox, Chrome and Safari are also compatible.

2. Use the CMS URL https://www.cms.fdps.com/cms-new/ link that you have been given for CMS access.

3. You will see the CMS login screen:

4. Enter your assigned user name, Click **Continue**.

5. On the second screen enter the password that you established.

6. Click the **LOGIN** button, or just press the **Enter** key.
**CMS Home Screen**

When you have successfully logged in to CMS, you will see the **CMS Home** screen:

To place Card Orders, you will access the Bulk Module.

- Click on **Bulk**

**Instant Issue Welcome Packet orders**

Using the Navigation Tree on the Left hand side, select the plus buttons to expand screen options.

- Click on 'Bulk>New Order>Temp Generic'
- Select the Program you wish to order Cards from your drop down list.
- Enter an **Order Description**. This is for your reference purposes.
- The name information displayed is tied to the User ID placing the order.
- Click **Continue**
Enter **Client Company Name** - This is usually the Client’s Program name.

Enter the **Quantity** of cards needed for the location.

Always select **NO LOAD**

Always select **Create Customized Greeting on all Cards** and enter up to 19 characters. Example: Payroll card or Valued Employee

Always select Carrier **YES**

Always select Begin Charging Fees **NO**

Ignore the Service Fee or Mailing fee fields
Fill in the Mailing address where the cards should be shipped. Card Orders should be shipped to the client business location for employer distribution of cards.

- Click **Continue**

Select the **Card Design Kit type**—**Standard, FL/GA, CA, or UT**, based on the state where employees are located. This ensures the correct materials to meet state compliance laws are included. The State specific kit types are in the description below the box.

- Click **Continue**
Review the data on the Order Confirmation Screen

Confirm Number of cards, Load Value amount, and Shipping address.

- Click **Submit Order**

The File is now processing and will appear in Pending, and then Complete Status.

- Click on the **View** link or **View order**
• Click on the **Line Item** Number link

The Line item Detail screen will show the number of Accepted and Rejected Records in the Order. Temp Generic Orders will either ALL accept, or ALL reject.

• Click on the **Download Accepted Account Details** Link
The Account Details file is in .txt format. This is an example of the downloaded records from a Bulk Card Order. The only data fields that will appear are the Account Number and the Masked Card Number, along with the Return Code R00, which indicates the detail record processed correctly.

Details on the fields and layout for the Accepted and Rejected Download file, as well as all return codes and their definition, can be found in Chapter 7 of the CMS Bulk User Guide.
Personalized Card Order

Placing a Personalized Bulk Order combines Card order with Enrollment. It will generate cards and accounts with Employee names and addresses.

Before placing a New Personalized Card order in CMS, complete the Bulk Personalized and Update Layout spreadsheet to identify the number of records that will be submitted.

Follow the directions on the form. Complete all highlighted columns, including DOB and SSN for Payroll programs. The Activate Card field in column K should be N. The Amount field in column X should be entered as 00.00. Column O and P are available for Employee ID/Member ID and Employer ID/Location or Department Code.

Here is a short list of the allowed characters. Two special characters cannot appear together, this includes a space. Please request the full Enrollment Validation Criteria from Client Service. Or reference the Bulk App User Guide Chapters 8 and 9

A-Z Letters both upper and lowercase
  . Period
  / Slash
  , Comma
  Space

0-9 Numbers
  ' Apostrophe
  & Ampersand
  - Hyphen

Save the file as .txt and name it with NO SPACES.
Ex: Cardorderdate.txt
- Click **New Order** tab
- Click **Personalized** Link

![Image of New Order tab and Personalized Link]

- Select **Program Name** from the drop down menu
- Enter **Order Description** - this is used for your reference only
- The name information displayed is tied to the User ID placing the order
- Click **Continue**

![Image of Personalized New Order form]

- [Program Name]: Money Network AM Demo 18011 3208
- [Order Description]: Test Demo
- [Company Name]: Money Network AM Demo 1101
- [First Name of Harquator]: Training
- [Last Name of Harquator]: Demo
- [Company Address]: 7000 Goodflett Farms Parkway
- [Street 1]: Third Floor
- [City]: Cordova
- [State]: TN
- [Zip]: 38016
- [Email Address]:

![Image of Cancel and Continue buttons]
- Enter the **Client Company Name**—this is usually the Clients program name.
- Always select Begin Charging Fees **NO**
- Select **No Greeting for all Cards**
- Ignore the Service Fee or Mailing fee fields

Select **Alternate Address** and enter the client business location where cards should be delivered for employer distribution of cards.
- Enter the red asterisk required fields
- Click **Continue**
- Select the **Card kit type** - Standard, FL/GA, CA or UT. The state specific names are identified in the description below the boxes.
- Click **Continue**

- Enter **Total Number of Records** included in your upload file.
- Enter **Total Amount** 0.00
- Click **Browse** to
- Click the **Shipping Address Data is NOT included in this file**.
- Click **Upload**
• **Click Continue with Order**

Preview Order screen, Review the Number of cards ordered, Load Value amount and Shipping Address for the Card Order.

• **Click Submit Order**
Order Confirmation screen indicates the Status of the file processing. Will initially show Pending and change to Complete.

- Click View Order to see the ‘Status’ file results

- If ‘Order Status’ and ‘Line Item Status’ is ‘Complete, then all records on file were successfully processed
- Click Line Item Number to view summary of record and retrieve return file if there were errors
- If errors are found in the file, return to the ‘Tab Delimited’ file saved on your computer/desktop, to correct the errors and resubmit the file
• Click the **Download Accepted Account Details** Link

![Download Accepted Account Details](image)

The Account Details file is in .txt format. This is an example of the downloaded records from a Bulk Card Order. This file will include more fields, as personal information was included during the file upload. On the far left hand side of the file, you will find the Account Number, the Masked Card Number, along with the Return Code R00, which indicates the detail record processed correctly.

Details on the fields and layout for the Accepted and Rejected Download file, as well as all return codes and their definition, can be found in Chapter 7 of the CMS Bulk User Guide.

![Accepted Download File](image)

If you have any questions or concerns with performing any of the tasks involved in this manual, please contact Money Network Client Services at 1-866-711-4609 or send email to [mnclientservices@firstdata.com](mailto:mnclientservices@firstdata.com) for assistance.