

# Quick Reference Guide Web Portal

## Log-In

1. Go to [www.ernex.com](http://www.ernex.com). On the top left corner of the page, select 'Merchant Log-In'.
2. Enter your User Name (usually your email address).
3. Enter your password or your default password (if this is your first log-in).

On your first log-in, you will be prompted to change your password.

## Change Password

1. Select the 'My Profile' section from the Top Menu.
2. Select 'Change Password' from the Left Menu.
3. In the appropriate fields enter:
  - a) Your old password
  - b) A new password
  - c) Re-enter the new password
  - d) Click 'Submit'

**Note:** The new password must be 7 alpha-numeric characters.

## Add/Update Security Questions

To update your security questions and answers:

1. Select the 'My Profile' section from the Top Menu.
2. Select the 'Add/Update Security Questions' from the Left Menu.
3. Enter your current password in the 'Old Password' field.
4. Select "Security Question #1" from the drop down menu.
5. Enter your answer #1 in the subsequent field.
6. Select "Security Question #2" from the drop down menu.
7. Enter your answer #2 in the subsequent field.
8. Click 'Submit'.

## Forgot Password

If you forget your password:

1. From the sign-on screen select the 'Forgot your password?' Link.
2. Fill in the answers to your selected security questions.
3. Then create a new password and click 'Submit'.
4. If you do not remember answers to your questions, call your program support center to reset your password.

## View/Update Profile

To update your personal profile or Portal options:

1. Select the 'My Profile' section from the Top Menu.
2. Select the 'Update Profile' section from the Left Menu to update your First Name, Last Name or preferred Language and 'Click' Update.
3. Select 'Update Password' to change your password.
4. Select 'Update Log-in Id' to change your user name (email address).
5. Select 'Update Security Information' to change your security questions and answers.

## Email Ernex Support

1. Select the 'Home' section from the Top Menu.
2. Enter your subject in the appropriate field.
3. Enter your message.
4. Enter your phone number if you prefer a call back for support
5. Click 'Submit'. Messages will receive replies within 24 hours.

## Log-Off and System Time-Out

1. To Log-off at any time while using the Web Portal click on the 'Sign-out' button on the top right hand corner.

**Note:** For security reasons, the Web Portal automatically signs you out after 30 minutes of inactivity. To continue using the Portal, simply log-in again.

## Cardholder Lookup

To search for a cardholder, access card information:

1. Select the 'Cardholders' section from the Top Menu.

2. Key the card number in the search field or Search by entering a cardholder's Full Last name, Phone Number or Postal / Zip Code and click 'Go!'
3. Click 'View' to access the card information for a selected card.

## Card Information

This is the default section for a selected card, and it allows you to view: Card Status, Card Expiry Date, Last Transaction Date, Card Balance, Card Transaction History, Cardholder Profile and Card Portal Account.

## View Card Transaction History

1. Select 'Transaction History' from the Left Menu.
2. Select last 30 days, last 60 days, last 90 days or All from the dropdown menu and click 'Go!'
3. Click on 'Detail' for any transaction view details.

## Manage Cardholder Profile and Update Portal Account

To view or manage cardholder profile:

1. Select 'Update Profile' from the Left Menu.
2. View or update profile details as required and click 'Update' to save changes.
3. Select 'Update Account' for a Card and then 'Update Password' from the left menu.
4. Reset the card password to a default and click 'Submit'.

## Deactivate Card

To deactivate a card from the Portal:

1. Select 'Deactivate Card' from the Left Menu.
2. Select Enterprise, Business or Location as required.
3. Click 'Deactivate'.

**Note:** Once a card has been deactivated, it is permanently disabled. Members will have to re-enroll to use the program again.

## Loyalty Points Adjustment

To adjust points on a Loyalty card:

1. Select 'Loyalty Points Adjustment' from the Left Menu.
2. Enter the number of Points to be adjusted.
3. Click on 'Add' or 'Remove' to complete the adjustment.

## Mass Activation Request for Gift Cards

To submit a Mass Activation Request for Gift Cards:

1. Select the 'Cardholders' section from the Top Menu.
2. Select 'Mass Card Activation' from the Left Menu.
3. Include the start and end ranges for the card numbers, quantity of cards, and a single Dollar (\$) value to load on the cards.
4. Click 'Submit'.

**Note:** Activations will be completed within 24 to 48 business hours.

## Manage Existing User / Create New Users

1. Select the 'User Management' section from the Top Menu.
2. Select 'Create New User' from the Left Menu.
3. Select a location name to add a user to a specific location.
4. Choose the roles for this user.
5. Enter User Name, Email (log-in ID) and Default password for the user.
6. Click 'Add' to create a new user.
7. To manage a user, select 'Manage Existing Users' from the Left Menu.
8. Search for the user by User Name or Role or Actor Domain.
9. Click 'View Details' to see user details.

## Update User Account

To update a user's Portal account:

1. Select 'Update Password' to reset password to a default password.
2. Select 'Update Account' to disable or re-enable Portal access.
3. Select 'Update User Role' to modify the user's Portal actions.
4. Select 'Update Authority Level' to update user's authority level.

Consult Your Manager to determine what additional Information you need to know about your Program and Portal Access

**If you have questions, please contact Ernex at 1-888-376-3999, or at [support@ernex.com](mailto:support@ernex.com)**