Client portal guide: dashPay

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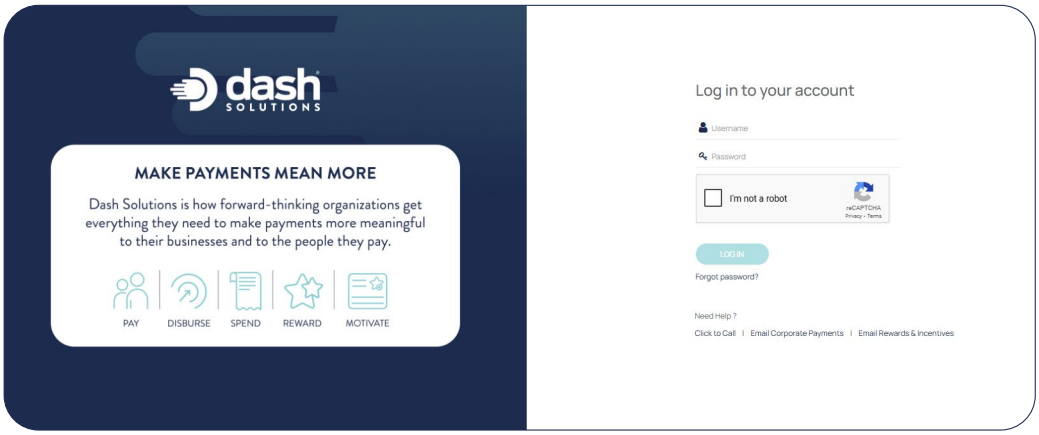
Visit the Video Guide Library

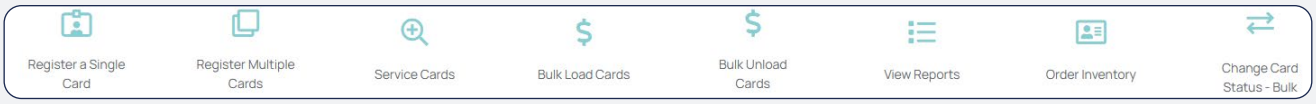
Login:

Upon completion of onboarding, you will receive an email from admin@dashsolutions.com with the subject “Client Portal Access”.

Note: If the link has expired, please reach out to your Implementations Manager.



Dashboard:

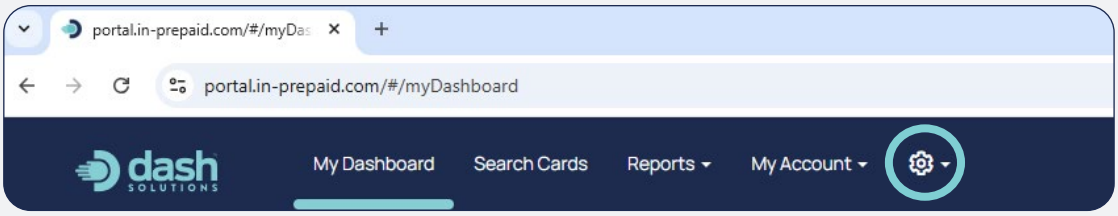


Once logged in, you will see your Dashboard. From here you can:

- Register cards
  - For instant-issue cards, you will choose “Register a Single Card”
  - For personalized cards, you will choose “Order a Single Card”
  - For bulk upload, you will choose “Register/Order Multiple cards”
- Service cards
  - Look up cardholder accounts
- Bulk load/unload
  - Loading and unloading of funds on our spend product
- View Reports
  - Pull specific reporting related to your product
- Order Inventory

- Order instant issue inventory when you are running low

- Change card status
  - Move one or more cards to a different status, if needed



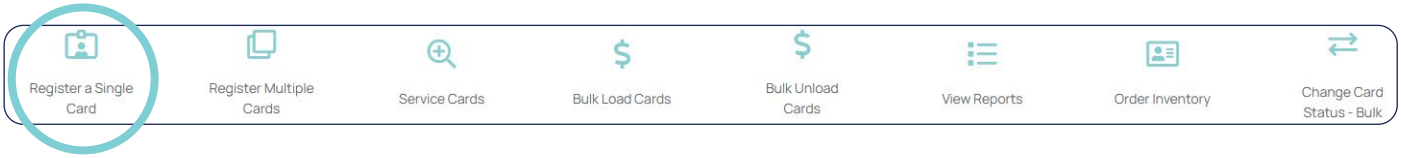
The header across the top allows you to:

- Search Cards
- Pull Reports
- Find your Virtual Funding Account details, if applicable
- Click the gear icon to add users to the portal, access API documentation and Portal FAQ guides

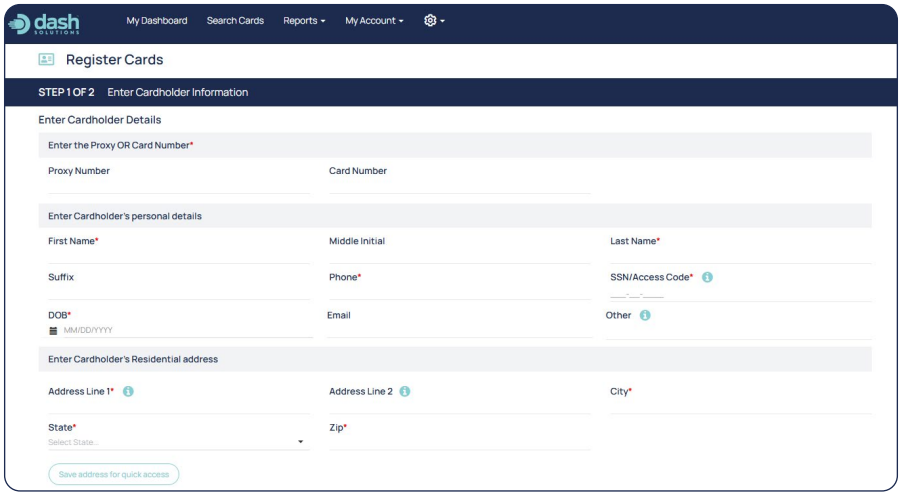
Register a single card:

Upon receipt of your instant issue cards, you are now ready to register cards to employees.

- From the My Dashboard screen click REGISTER A SINGLE CARD



- Enter all cardholder details. Required fields are marked with a red asterisk (*)
  - You have the option to register a single card either by PROXY or CARD number. The proxy number can be found on the front of the card envelope labeled PID.



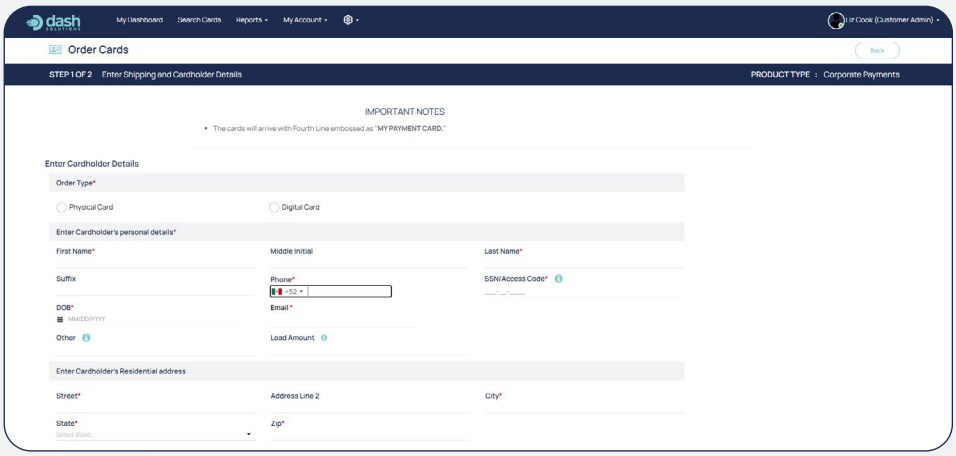
- Important notes:
  - Do not use a company address or a P.O. Box. Use a residential address only.

- Do not type dashes when entering phone number.
- For DOB, select the date or type it in MM/DD/YYYY format (including slashes)
- If the shipping address is different, select this option and enter shipping address. If you don't, the card will be mailed to the residential address listed above.

- Click NEXT PAGE to continue and then CONFIRM REGISTRATION when complete.
- Upon completion, the system will provide you with cardholder detail reports. This includes: Proxy number, Routing number, and Account Number. Make note of this information for funding purposes. You can either copy/paste or download the information to text or excel format.

Order a single card:

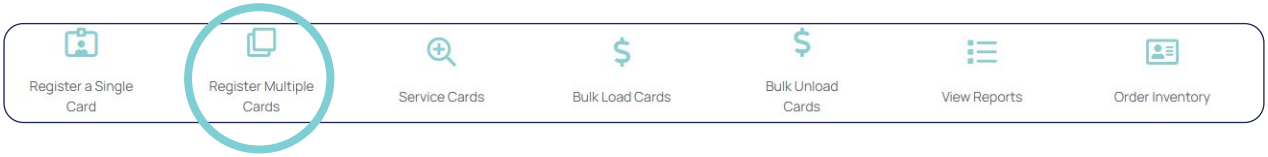
- From the My Dashboard screen click ORDER A SINGLE CARD
- Enter all cardholder details. Required fields are marked with a red asterisk (*)

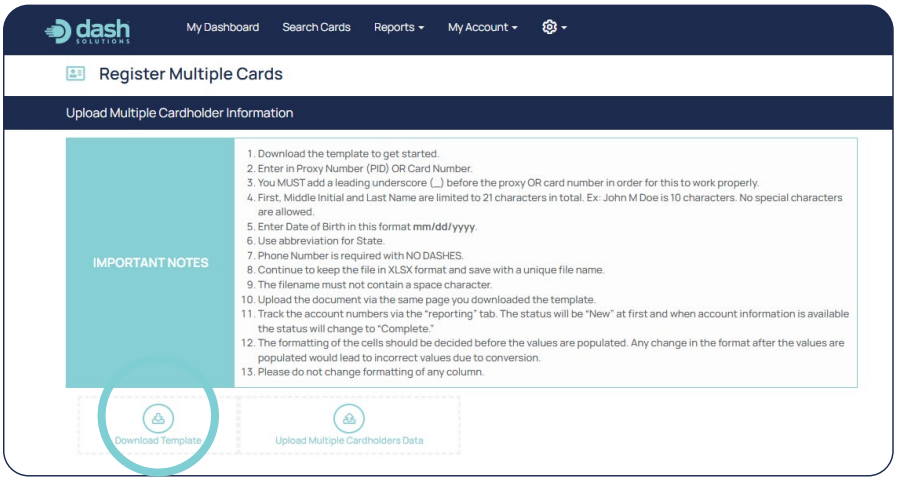


- **Important notes:**
  - Do not use a company address or a P.O. Box. Use a residential address only.
  - Do not type dashes when entering phone number.
  - For DOB, select the date or type it in MM/DD/YYYY format (including slashes).
  - If the shipping address is different, select this option and enter shipping address. If you don't, the card will be mailed to the residential address listed above.
- Click NEXT PAGE to continue and then CONFIRM CARD ORDER
- Cards ship UPS and should arrive in 7-10 business days

Register multiple cards:

- From the My Dashboard screen, click REGISTER MULTIPLE CARDS

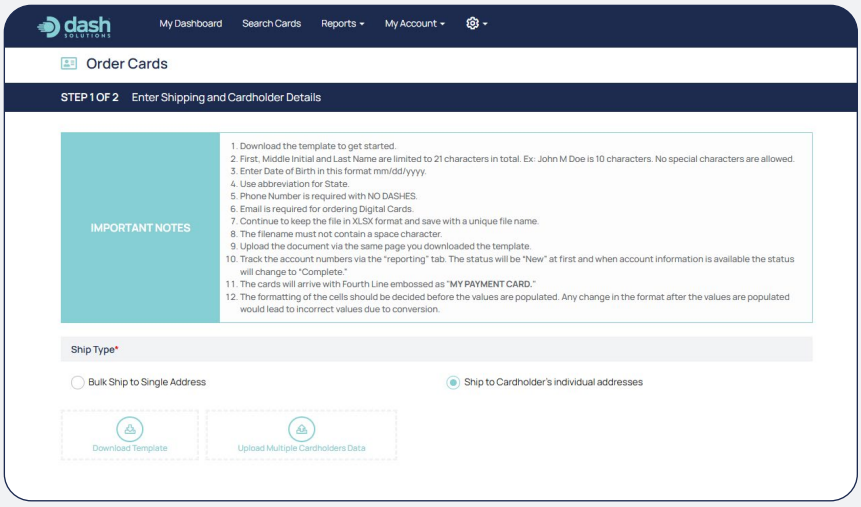




- Click DOWNLOAD TEMPLATE and the system will open the template file in Excel
- Highlight all columns with column headers (A through R) and double click between columns A and B. Each column will now be expanded so that you can view all column headers.
- Complete the template by entering the following information:
  - PROXY or CARD number
    - » Tip: when you enter the proxy, excel truncates the number and displays something like "9.53279E+12". Right-click the cell and select "Format Cells". Scroll to "Custom" and select "0". Click OK to save the changes and the proxy number should now be fully displayed.
    - » To mirror this change for all proxies, click the cell with the full number and click "Format Painter". Then, highlight all the cells below. The proxies should display correctly after the formatting.
  - Cardholder Information
    - » Type the cardholder information in the appropriate fields
    - » Enter social and phone number with NO dashes or spaces
    - » Enter DOB in "MM/DD/YYYY" format, including the slashes
    - » Residential address can NOT be a P.O. Box
    - » Enter a shipping address if applicable for the cardholder
    - » Use the "Other" field to capture other information such as employee ID or branch location
  - Continue to enter information for each card you need to register
  - Save file in .csv format
  - Click UPLOAD MULTIPLE CARDHOLDERS DATA. The upload file box will appear. Click CHOOSE FILE and select file for uploading. The system displays your information for verification. You have the option to edit or delete cardholder information if necessary.
  - Once you have reviewed all information, click CONFIRM REGISTRATION. You should see a confirmation message pop up that your registration is complete.

Order multiple cards:

- From the My Dashboard screen, click ORDER MULTIPLE CARDS. Be sure and read the important reminders regarding the batch upload process.

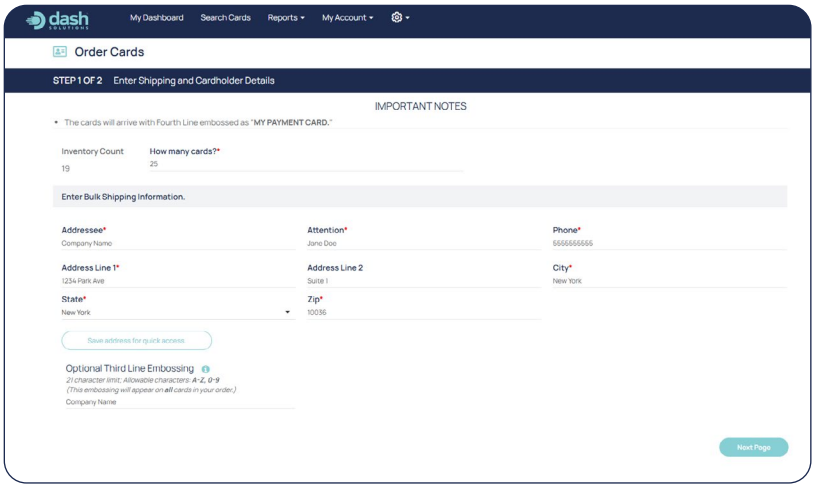


- Choose ship type.
  - If you want all cards delivered to your company address, select Bulk Ship to Single Address.
  - If you prefer cards ship directly to the cardholder, select Ship to Cardholder's individual address.
  - Click DOWNLOAD TEMPLATE
  - Complete the template by entering the following CARDHOLDER INFORMATION:
    - » First/Last Name
    - » Social Security Number (no dashes or spaces)
    - » Phone Number (no dashes or spaces)
    - » DOB in MM/DD/YYYY format, including the slashes
    - » Shipping address, if applicable, for the cardholder

      * Note that this cannot be a P.O. Box
    - » Use the OTHER field to capture information such as employee ID or branch location
  - Continue to enter information for each card you need to order
  - Save your file in .csv format so that you can update and register multiple cards
  - Click UPLOAD MULTIPLE CARDHOLDERS DATA. The upload file box will appear. Click CHOOSE FILE and select file for uploading. The system displays your information for verification. You have the option to edit or delete cardholder information if necessary.
  - Once you have reviewed all information, click CONFIRM ORDER. You should see a confirmation message pop up that your order is complete.

Ordering Instant Issue Inventory:

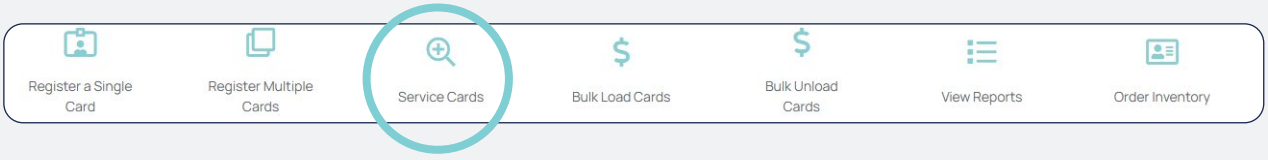
- In the Dashboard, click on the icon that says “Order Inventory”



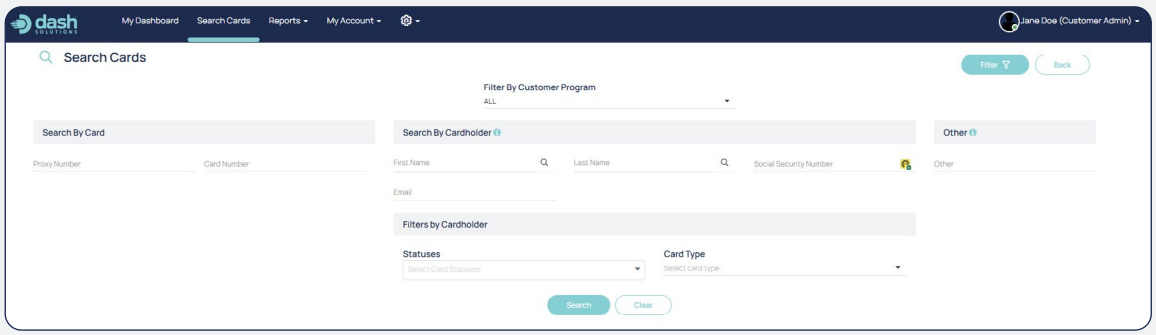
- If you have previously ordered cards, you will see your inventory count
- Next, provide card order details. Required fields are marked with a red asterisk (*)
- Provide the number of cards needed and your company shipping information
- **Important notes:**
  - Use a physical address for shipping. P.O. Box is not allowed.
  - Any order over 500 will send an approval alert to our Account Management team to approve.
  - Cards ship UPS and should arrive in 7-10 business days.
- Once complete, click on the “Next Page” icon at the bottom. This will take you to a Summary and Confirmation page. Review your order and click “Confirm Order” icon.

Service Cards: Instant-Issue and Personalized

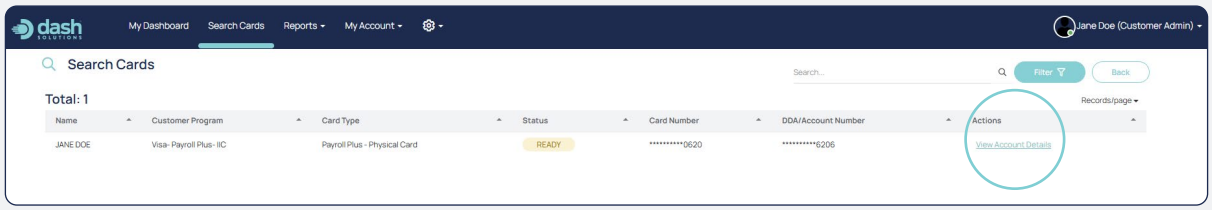
From the My Dashboard screen, click SERVICE CARDS under the appropriate Customer Program.



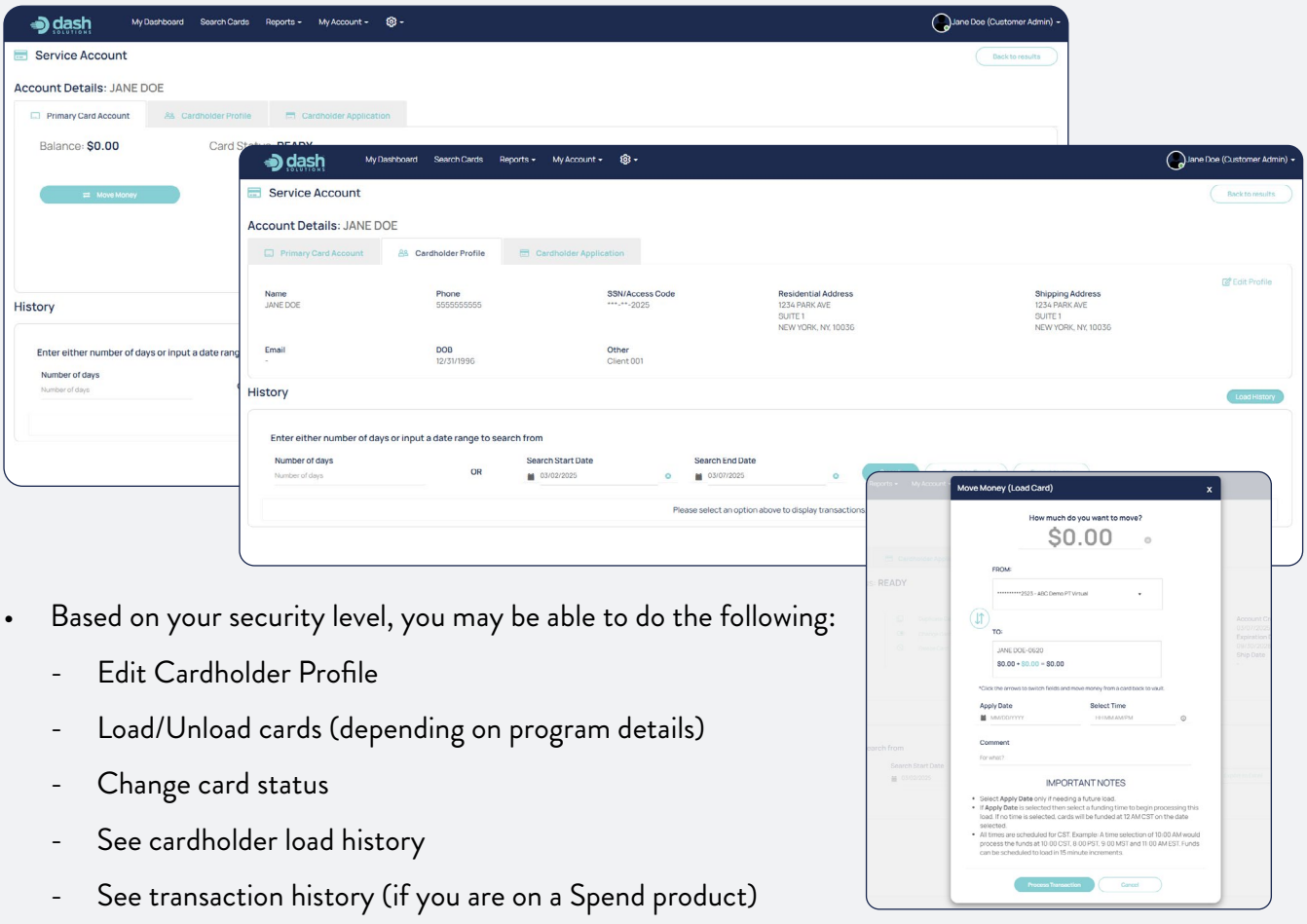
- If needed, use the options in the “Filter by” dropdown to limit your search results by program.
- Type at least one value in the search options field and then click SEARCH. The Card Accounts screen will appear with records that match your search criteria.



- Locate the correct record and click VIEW ACCOUNT DETAILS in the Actions column.



- The Service Account screen will now be displayed. Basic Cardholder Information is shown at the top and servicing options at the bottom. You will be able to see cardholder balance and status of their account, as well as cardholder profile.

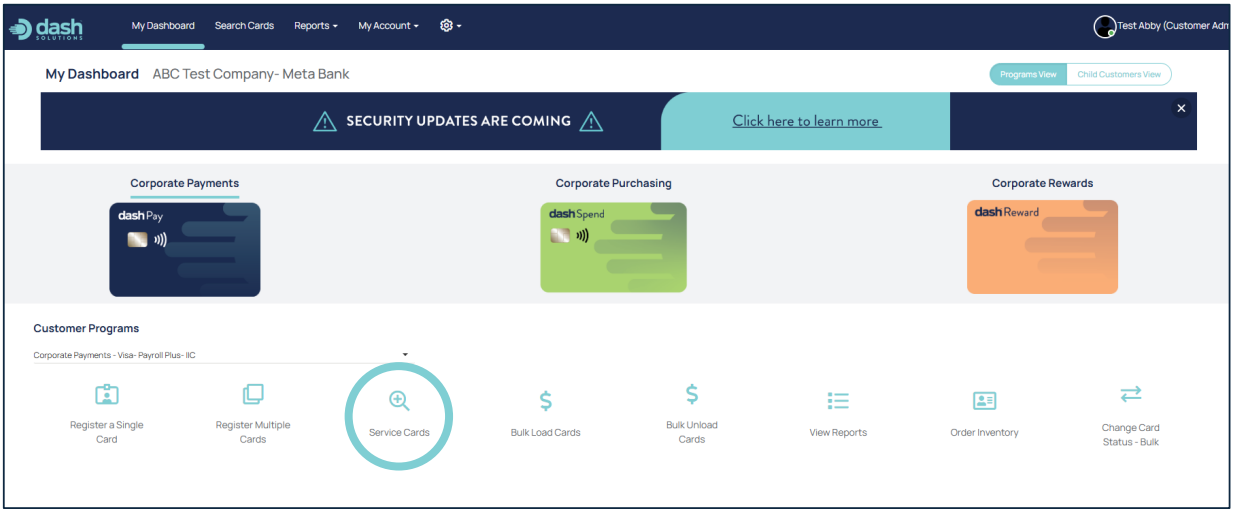


- Based on your security level, you may be able to do the following:
  - Edit Cardholder Profile
  - Load/Unload cards (depending on program details)
  - Change card status
  - See cardholder load history
  - See transaction history (if you are on a Spend product)

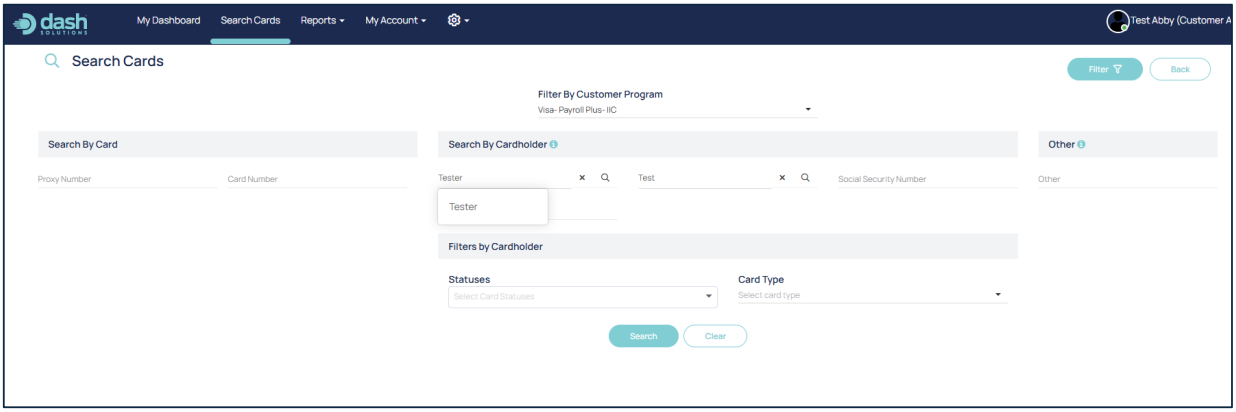
Replacing Physical Cards (using Instant Issue Inventory)

The Dash Client Portal allows a Customer Admin to mark cards lost/stolen and replace with blank, unregistered cards (instant issue inventory). Once the card is replaced, the existing balance transfers to the new card. The new card must then be activated to begin using.

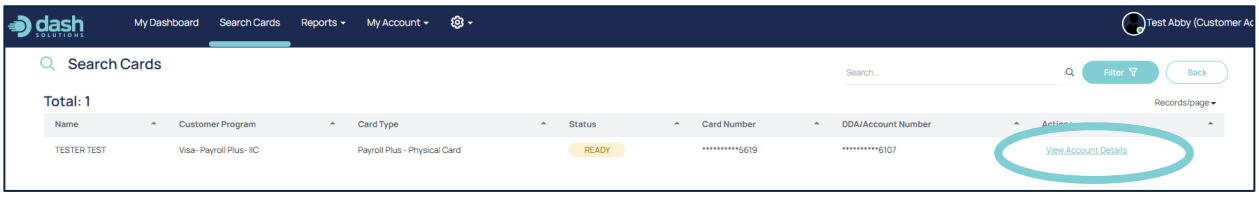
- Navigate to the Service Cards function



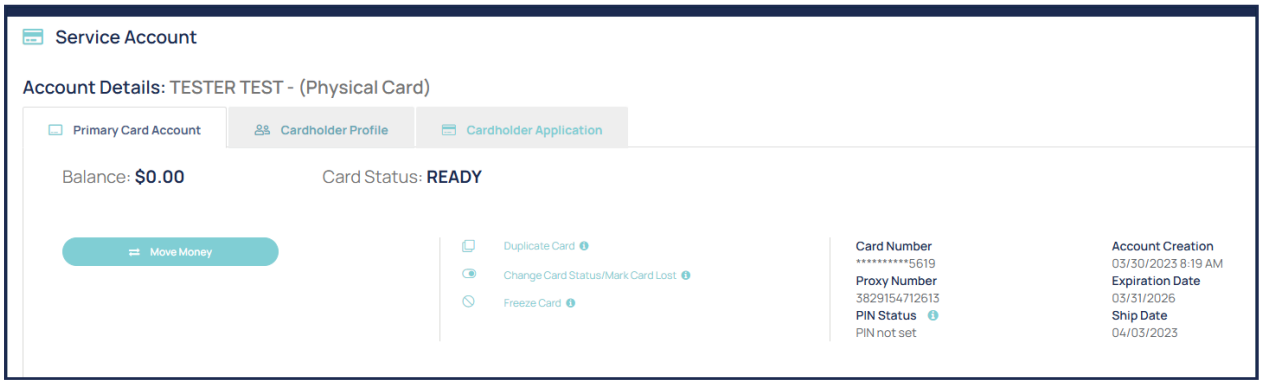
- Search for a cardholder by any of the available search parameters:
  - Proxy Number
  - Card Number
  - First Name
  - Last Name
  - SSN
  - Other (Employee ID)



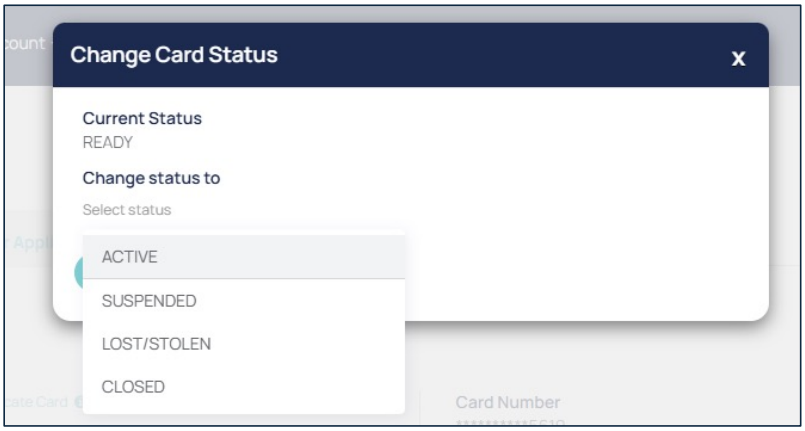
- Any card associated with the data entered will populate on the next page after selecting Search.
- Select View Account Details for the card you wish to replace.



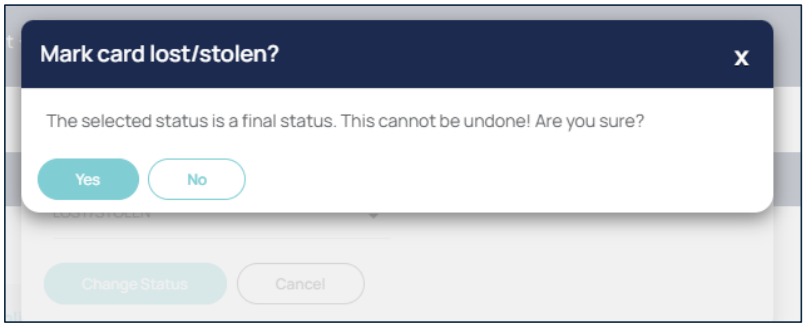
- You will either see “Change Card Status/Mark Card Lost” is the card is marked Ready or Active or you will see “Replace Card” if the card has already been marked Lost/Stolen.
- If Active/Ready, select Change Card Status.
- If Lost/Stolen, select Replace Card.



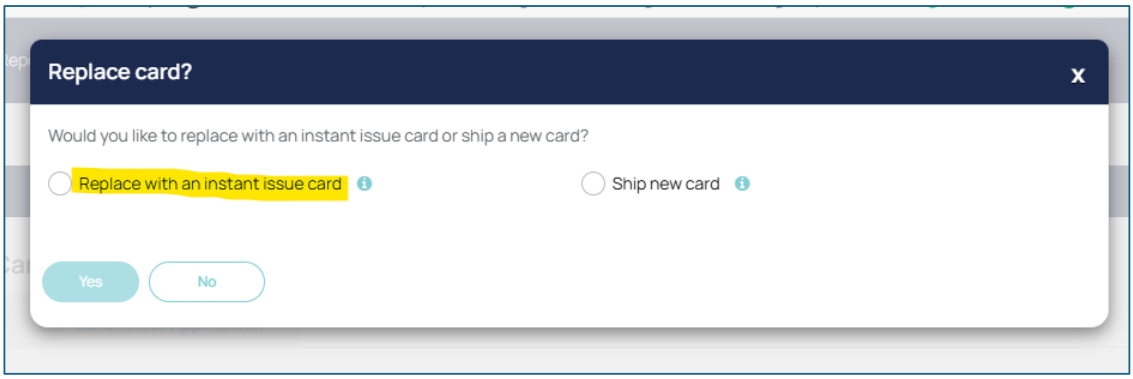
- If Active/Ready, Use the dropdown menu to change the status to Lost/Stolen.
- If Lost/Stolen, proceed to next steps.



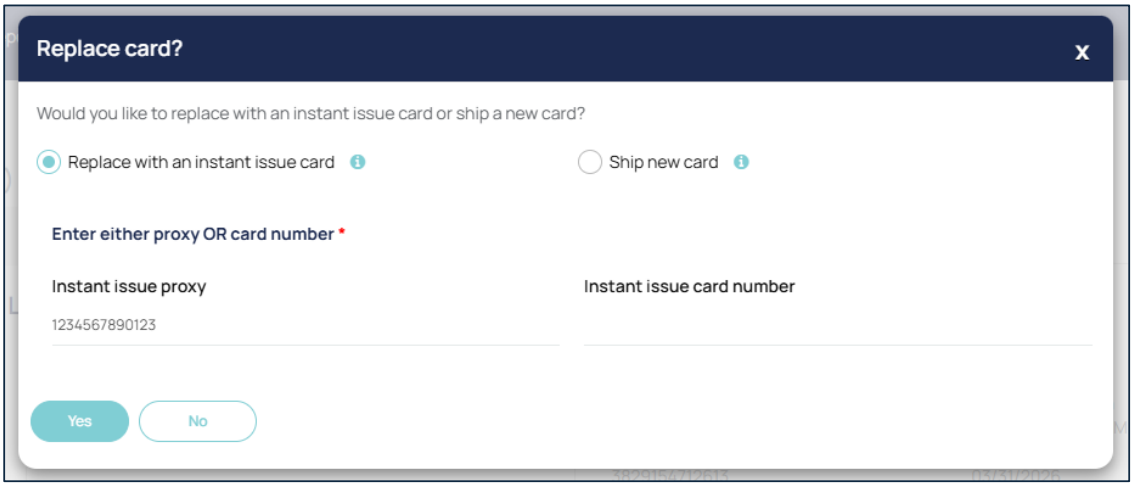
- The system will then ask if you are sure because this action cannot be undone. Select YES



- The system will then ask how you would like to replace the card. Select Replace with an instant issue card and grab a blank card from your box of inventory.



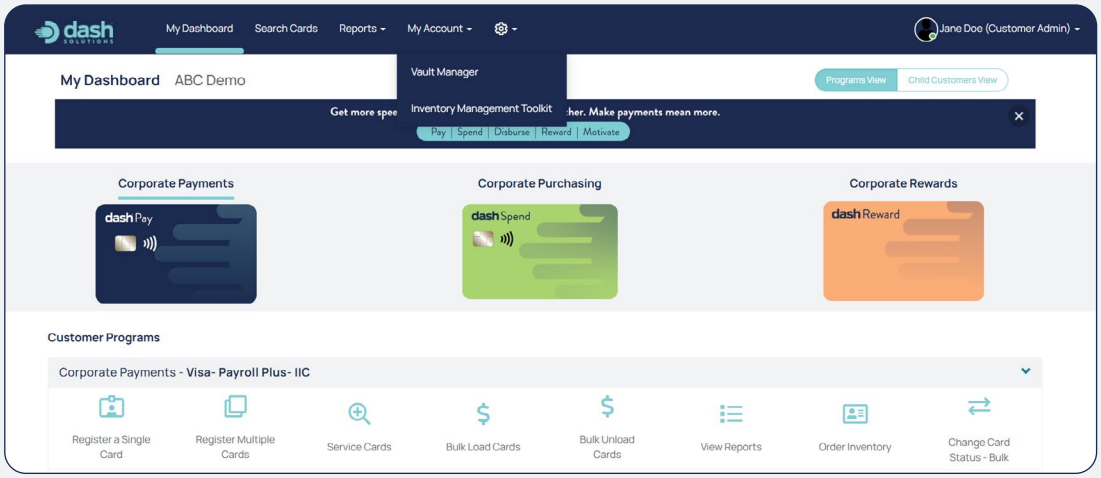
- Input the proxy number into the Instant Issue proxy field and select Yes.



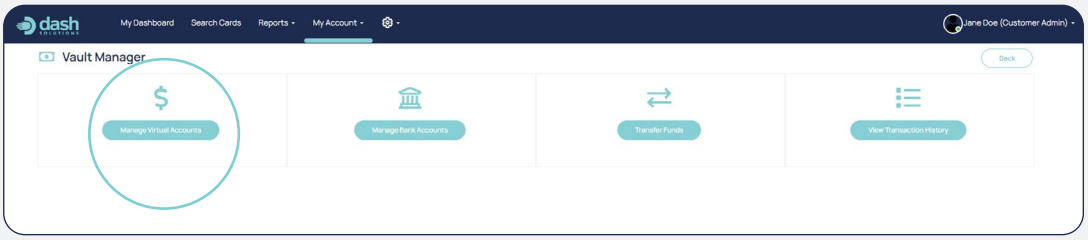
- The system will then say Successful in the upper, right-hand corner of the page.
- You can navigate back to Search/Service Cards and confirm that there are now multiple cards for the individual with the same Direct Deposit Account number – the old card will be marked as Replaced; the new card will be marked as Ready. The balance will be reflected on both cards.
- The cardholder just needs to call the IVR or use the MyDashCard app to activate and begin using.

Virtual Funding Account:

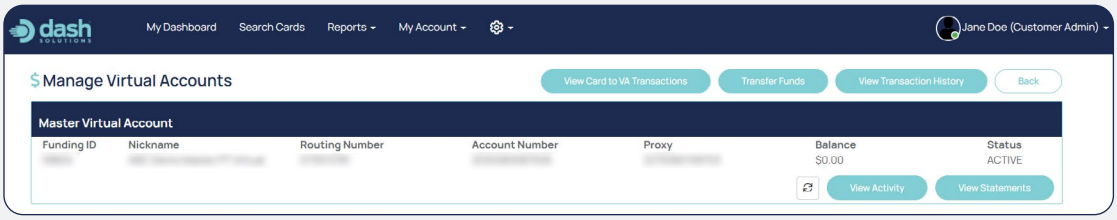
- From the My Dashboard header, click on “My Accounts”



- Click on “Vault Manager” in the dropdown, then click on “Manage Virtual Accounts”

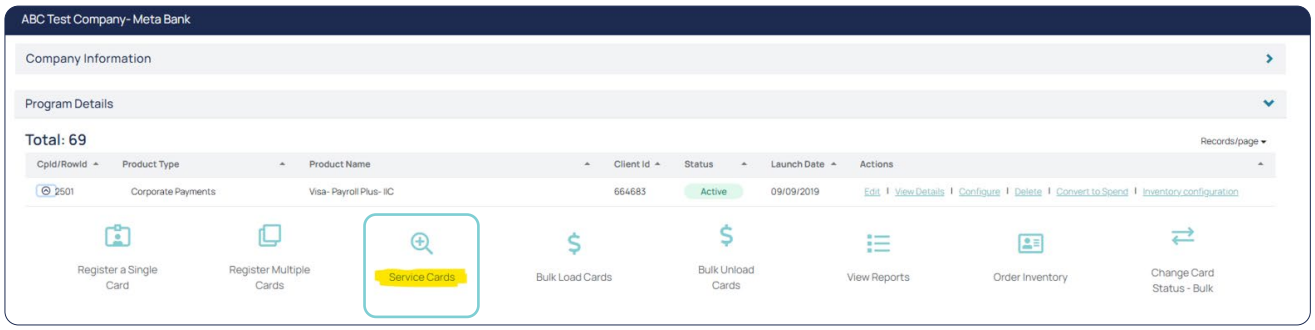


- A screen will be displayed with your Virtual Funding Account details. These details include:
  - Company Name
  - Routing and Account Information
  - Status of your account
  - Account balance
  - Activity and monthly statement

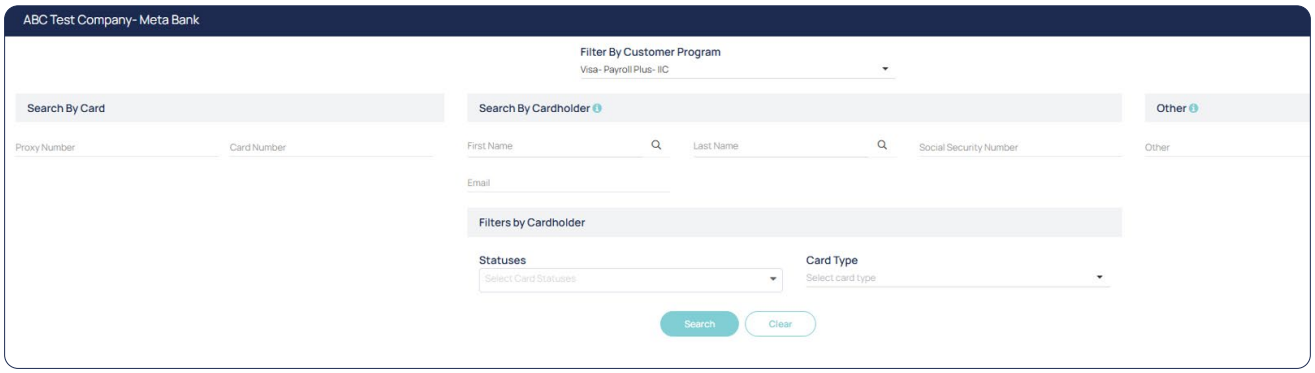


VFA - Replacements and Funds Transfer:

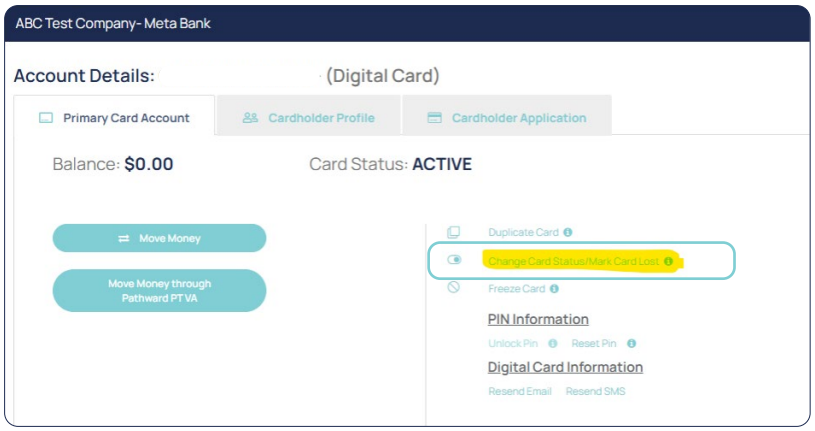
When needing to replace a card, it is ideal to replace the card in question by searching for the existing card in the portal using the Service Cards button.



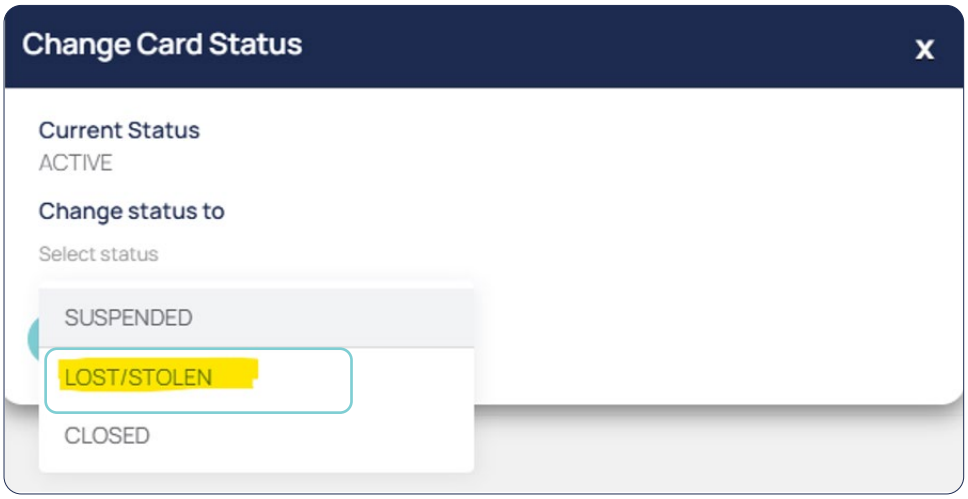
Search for the cardholder needing replacement by providing either the proxy, card number, first and last name, or social security number.



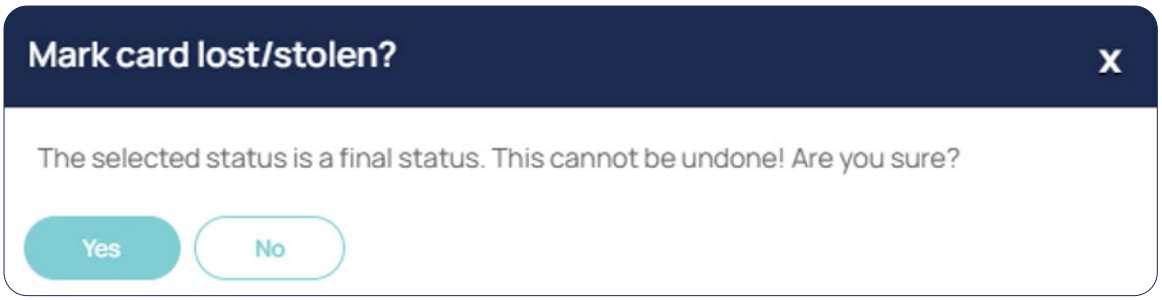
Click the “Change Card Status/Mark Card Lost” link within the Primary Card Account tab once the desired record is populating the screen.



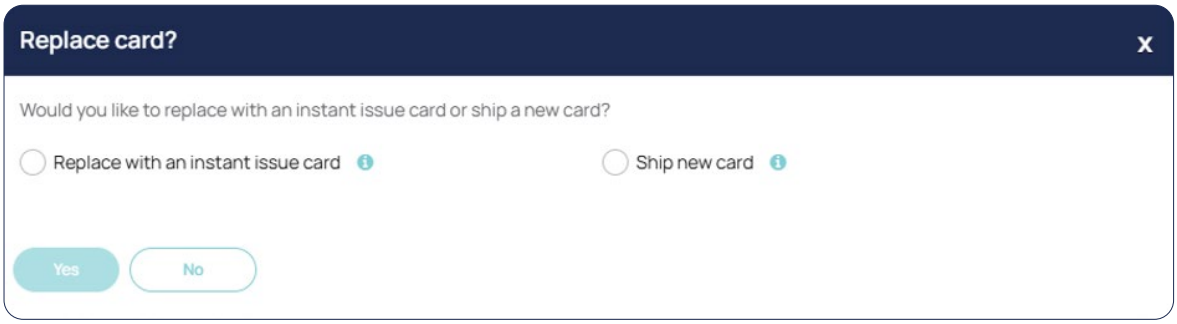
This will allow the card status to be changed from ACTIVE to LOST/STOLEN.



Confirmation will pop up that this is a final status and cannot be undone. Click YES.



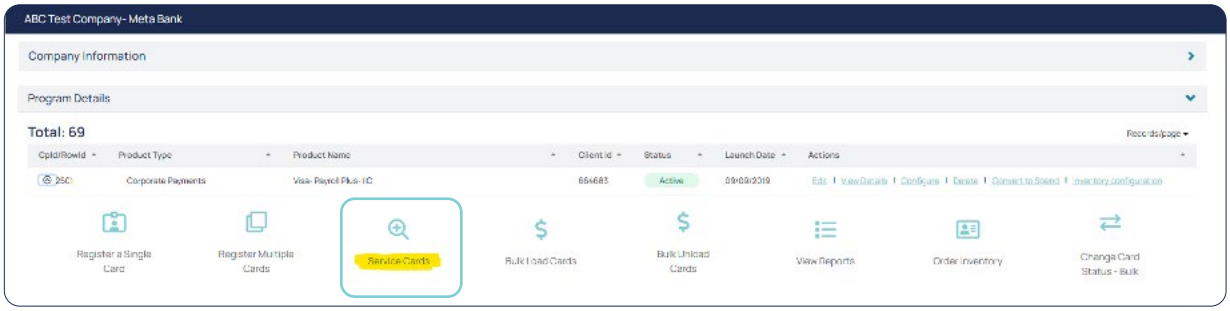
A screen will be presented with an option to replace the card with either an instant issue card (if available) or an option to ship a new card to the address on file (this takes 7-10 business days).



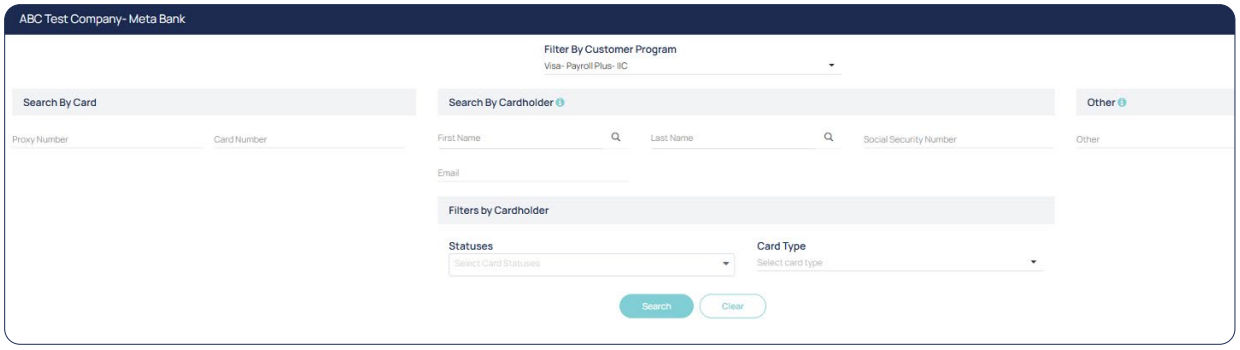
Replacing the card in this way ensures any available balance is automatically rolled to the new card and ensures any direct deposit information will stay the same and payroll will not need to be updated.

If, however, an entirely new registration and a separate profile for the cardholder has been created, and a Virtual Funding Account with Dash is being utilized, funds from the old card may still be moved to the new card in a few simple steps.

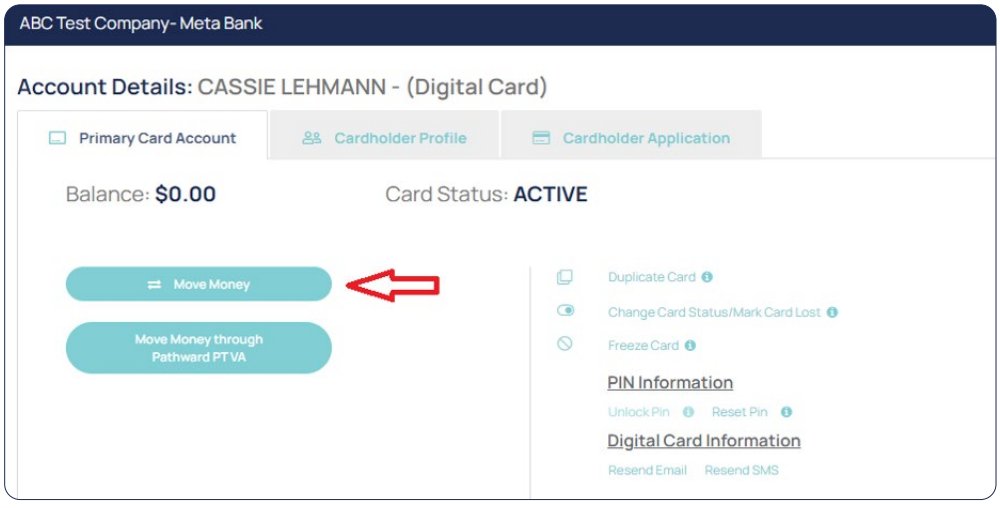
First, search for the old card in the portal by once again using the Service Cards button.



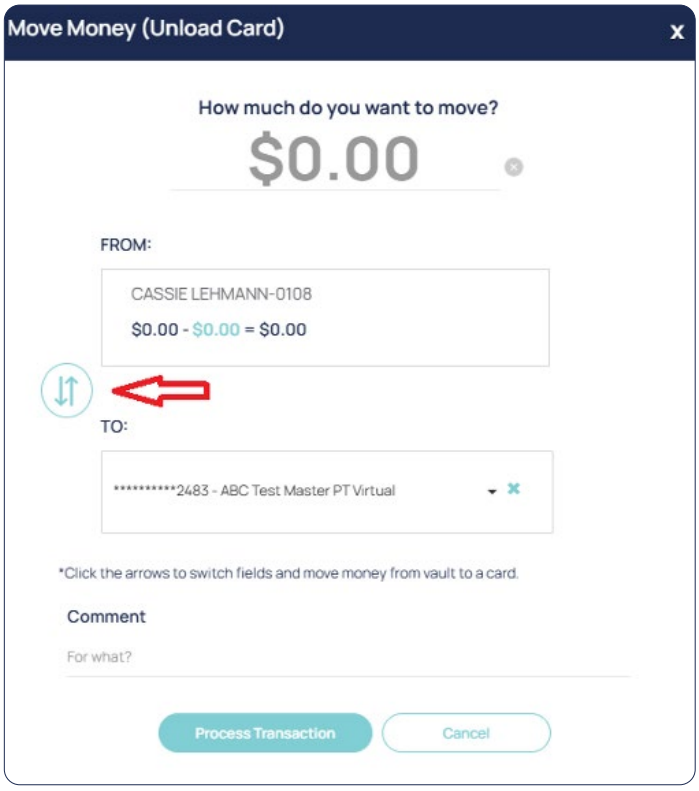
Enter the proxy, or first and last name, to locate the last four of the card from which funds need to be withdrawn.



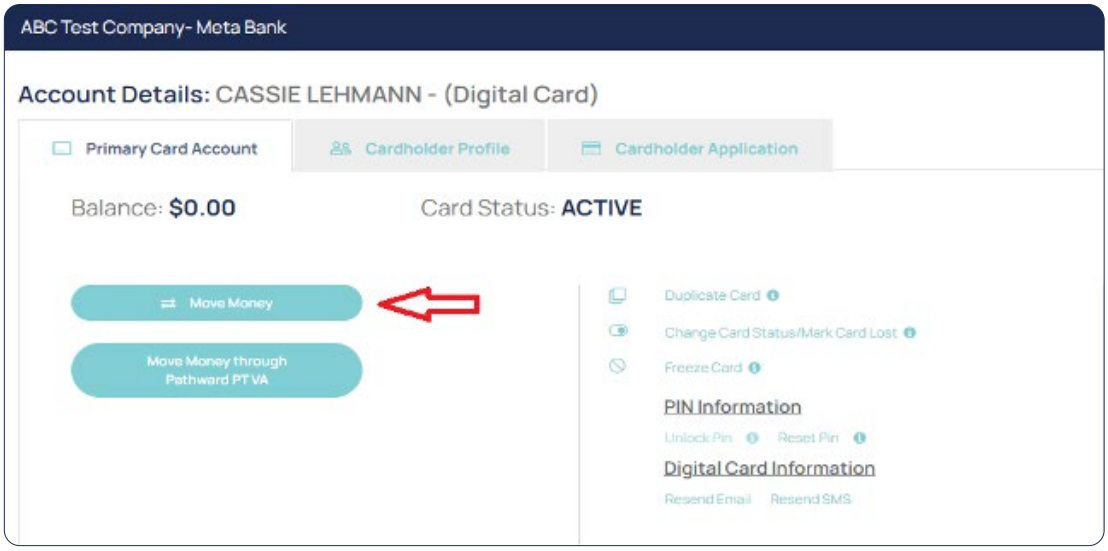
Once the OLD card is pulled up in the portal, select the Move Money button from the Primary Card Account tab.



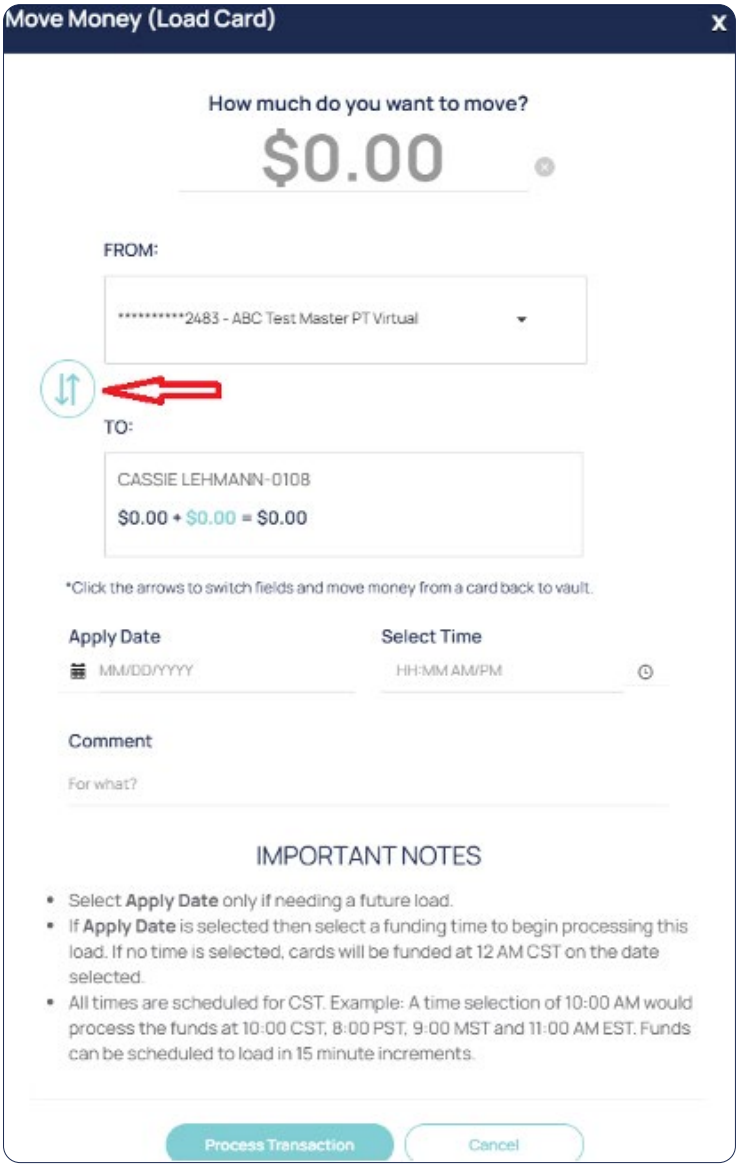
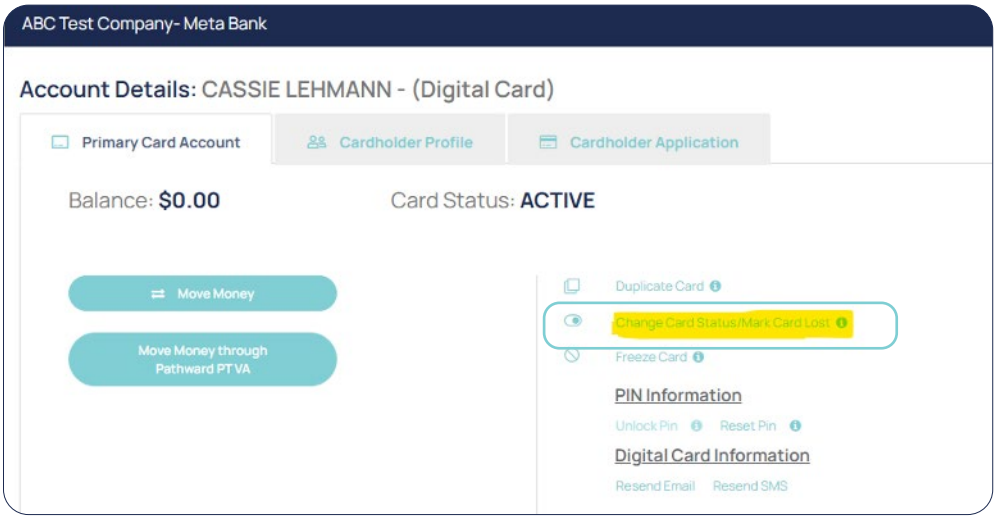
From the Move Money pop-up screen, enter the amount of money needing to be UNLOADED from the card back to the virtual funding account, and select the icon with the two arrows facing opposite directions to ensure funds are moving FROM the cardholder's account TO the virtual funding account. You may add a comment. Select Process Transaction.



Next, repeat the steps to search for the cardholder's NEW card and, when pulled up in the portal, once again select the Move Money button from the Primary Card Account tab.



This time, from the Move Money pop-up screen, enter the amount of money needing to be **LOADED** to the card from the virtual funding account to the cardholder's account. Select the icon with the two arrows in opposing directions and ensure funds are now traveling **FROM** the virtual funding account **TO** the cardholder's account. **Leave the Apply Date/Select Time fields blank.** You may add a comment. Select Process Transaction.



Once the transfer of funds is complete, the status of the old account may be updated to Closed if no longer needed by going back into that account and selecting the Change Card Status/Mark Card Lost link.