

# User Setup & Token Request

Logo: \_\_\_\_\_

Date: \_\_\_\_\_

## Requestor Information:

Client Name: \_\_\_\_\_

Requestor Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

## Token Shipping Address: (no PO Box)

Attention: \_\_\_\_\_

Address 1: \_\_\_\_\_

Address 2: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

Request Type (required)	User Type	Name: Last, First (required)	Email Address (required)	User ID	Token S/N	Replacement Reason

### Notes:

1. Each user must have a token to access Client-Central applications. Application access must be defined for each set of users.
2. Each FI can only have one Primary Security Administrator (PSA).
3. There is a charge to replace lost, stolen, or damaged tokens. Please contact a client services representative for further details.
4. Monthly per user fee will apply as defined on your service request.

Application, Permissions & Special Roles	Add Role / Application	Read	Access Rights		Delete	Remove Access
			Add	Update		
ATM Cardholder Preferences	NA		NA		NA	
ATM Cardholder Preferences—Create Reports	NA		NA	NA	NA	
ATM Load Self-Service	NA		NA		NA	
ATM Manager	NA		NA	NA	NA	
ATM Marketer Admin		NA	NA	NA	NA	
ATM Marketer Builder		NA	NA	NA	NA	
ATM Marketer Builder—Self Approving Builder		NA	NA	NA	NA	
Special Role						
ATM Marketer Inquiry		NA	NA	NA	NA	

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Application, Permissions & Special Roles	Add Role /	Read	Access Rights		Delete	Remove Access
	Application		Add	Update		
Card Management (CM2)	<input type="checkbox"/> Select to grant all Access Rights					
CM2—Add Cardholder	NA	NA		NA	NA	
CM2—Cardholder Information	NA		NA	NA	NA	
CM2—Cardholder Details	NA	NA	NA		NA	
CM2—Cardholder Accounts	NA	NA				
CM2—Cardholder Names	NA	NA				
CM2—Cardholder Replacement Orders	NA	NA	NA		NA	
CM2—Cardholder Risk	NA		NA		NA	
CM2—Cardholder Limits	NA		NA		NA	
CM2—Cardholder Usage	NA		NA		NA	
CM2—Cardholder Activation	NA		NA		NA	
CM2—Cardholder Holds	NA		NA		NA	
CM2—Balances Information	NA					
CM2—Maintain Order History	NA		NA		NA	
CM2—Card Parameter Information	NA		NA		NA	
CM2—Issuer’s Clearing House	NA			NA	NA	
CM2—Network Reporting	NA		NA		NA	
CM2—Cardholder Preferences	NA		NA			
CM2—Change Card Status Special Role		NA	NA	NA	NA	
CM2—Force Activate Special Role		NA	NA	NA	NA	
CardMetrics		NA	NA	NA	NA	
CardValet mConsole		NA	NA	NA	NA	
CardValet mConsole – FI Administrator 1 Special Role		NA	NA	NA	NA	
CardValet mConsole – FI Cust Svc Rep 1 Special Role		NA	NA	NA	NA	
CardValet mConsole – FI Cust Svc Rep 2 Special Role		NA	NA	NA	NA	
CardValet mConsole – FI Risk Analyst Special Role		NA	NA	NA	NA	
CaseTracker Debit	NA		NA		NA	
CaseTracker Credit Gateway	NA		NA		NA	
CVi Reports		NA	NA	NA	NA	
Compromised Cards (CardTracker)	NA		NA	NA	NA	
Enhanced ATM Preferences – View Preferences	NA		NA	NA	NA	
Files Refresh—File Refresh Process	NA		NA	NA	NA	
Files Refresh—Institution Refresh File	NA		NA	NA	NA	
Files Refresh—Refresh Error/Exception File	NA		NA	NA	NA	
InFact Credit		NA	NA	NA	NA	
InFact Credit—Analyst Special Role		NA	NA	NA	NA	
InFact Credit—Supervisor Special Role		NA	NA	NA	NA	
InFact Debit		NA	NA	NA	NA	
InFact Debit—Analyst Special Role		NA	NA	NA	NA	

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			Add	Update		
InFact Debit—Supervisor Special Role		NA	NA	NA	NA	
Institution	NA		NA		NA	
IRS Reporting—1099K Details	NA		NA	NA	NA	
Message Board		NA	NA	NA	NA	
Nautilus (Credit Only)		NA	NA	NA	NA	
Nautilus DR (Credit Only)		NA	NA	NA	NA	
Credit Management 2.0 (Credit Only)		NA	NA	NA	NA	
Credit Management 2.0—CSR Supervisor Special Role		NA	NA	NA	NA	
Credit Management 2.0—Customer Service Rep Special Role		NA	NA	NA	NA	
Credit Management 2.0—Fraud Analyst Special Role		NA	NA	NA	NA	
Credit Management 2.0—Inquiry Only Special Role		NA	NA	NA	NA	
Credit Management 2.0—Senior Customer Service Rep Special Role		NA	NA	NA	NA	
Credit Management 2.0—Transaction Entry Operator Special Role		NA	NA	NA	NA	
Credit Management 2.0 Hawaii (Credit Only)		NA	NA	NA	NA	
Credit Management 2.0 Hawaii—CSR Supervisor Special Role		NA	NA	NA	NA	
Credit Management 2.0 Hawaii—Customer Service Rep Special Role		NA	NA	NA	NA	
Credit Management 2.0 Hawaii—Fraud Analyst Special Role		NA	NA	NA	NA	
Credit Management 2.0 Hawaii—Inquiry Only Special Role		NA	NA	NA	NA	
Credit Management 2.0 Hawaii—Senior Customer Service Rep Special Role		NA	NA	NA	NA	
Credit Management 2.0 Hawaii—Transaction Entry Operator Special Role		NA	NA	NA	NA	
Credit Management 2.0 West (Credit Only)		NA	NA	NA	NA	
Credit Management 2.0 West—CSR Supervisor Special Role		NA	NA	NA	NA	
Credit Management 2.0 West—Customer Service Rep Special Role		NA	NA	NA	NA	
Credit Management 2.0 West—Fraud Analyst Special Role		NA	NA	NA	NA	
Credit Management 2.0 West—Inquiry Only Special Role		NA	NA	NA	NA	
Credit Management 2.0 West—Senior Customer Service Rep Special Role		NA	NA	NA	NA	
Credit Management 2.0 West—Transaction Entry Operator Special Role		NA	NA	NA	NA	
Credit Management 2.0 DR (Credit Only)		NA	NA	NA	NA	
Register Me—Self Registration	NA					

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Application, Permissions & Special Roles	Add Role / Application	Read	Access Rights		Delete	Remove Access
			Add	Update		
Register Me—Multi-User Registration	NA					
ResourceLink—Admin Terminal		NA	NA	NA	NA	
ResourceLink—Intranet		NA	NA	NA	NA	
ResourceLink—SIMBBA		NA	NA	NA	NA	
RuleManager		NA	NA	NA	NA	
RuleManager—RM Author Special Role		NA	NA	NA	NA	
RuleManager—RM CSR Special Role		NA	NA	NA	NA	
Scorecard—Accel™	NA		NA	NA	NA	
Single Point Corrections (SPC)	NA			NA	NA	
SPC—Adjustments	NA	NA		NA	NA	
SPC—Admin Message (Acquirer)	NA	NA		NA	NA	
SPC—Admin Message (Issuer)	NA	NA		NA	NA	
SPC—Admin Message Response	NA	NA		NA	NA	
Terminal—ATM Details/Options/Trans	NA		NA	NA	NA	
Terminal—ATM Availability	NA		NA	NA	NA	
Terminal—ATM Deposits	NA		NA	NA	NA	
Terminal—ATM Activity/Balance	NA		NA		NA	
Terminal—Self Service	NA					
Terminal—Send Load	NA	NA	NA		NA	
Terminal—Send RKT	NA	NA	NA		NA	
Terminal—Electronic Journal	NA		NA	NA	NA	
Terminal—Change Location Information Special Role		NA	NA	NA	NA	
TranBlocker—TranBlocker Rules	NA					
Transaction Journal	NA		NA	NA	NA	
User Administration	NA					
User Administration—Admin Only Special Role		NA	NA	NA	NA	
User Administration—Customize User ID Special Role		NA	NA	NA	NA	
WebFocus (Credit Only)		NA	NA	NA	NA	

Comments: \_\_\_\_\_

**Primary Security Administrator: Fax completed and signed form to 503-274-6619.**

Institution is solely responsible for use or misuse of any Security Tokens provided, and for establishing the extent and effectiveness of the Institution's security administration program for access to Client Central systems.

Security Manager's Name (Print) \_\_\_\_\_

Security Manager's Signature \_\_\_\_\_

Date \_\_\_\_\_

**Card Services Use Only:**

Client type: \_\_\_\_\_

Service Request #: \_\_\_\_\_