



Business Account User Guide

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TABLE OF CONTENTS

- I. [Basic Navigation](#) (Page 3)
 - [Login](#)
 - [Reset / Change Password](#)
 - [Change Basic Account Information](#)
 - [Forgotten Business Account ID](#) (Username)

- II. [Card and Product Ordering](#) (Pages 4-11)
 - [Order Cards](#)
 - [Order Products Only](#)
 - [Create / Copy / Import / Export Product Order](#)
 - [Update Pending Orders](#)
 - [Correcting an Order Validation Error](#)
 - [Pay for Your Order](#)
 - [Autoload](#)

- III. [Card Management](#) (Pages 11-25)
 - [Branches](#)
 - [Create / Update / Remove Branch](#)
 - [Groups](#)
 - [Create / Update / Remove / Rename Groups](#)
 - [Block / Unblock Card Groups](#)
 - [Export / Import a Card Group](#)
 - [Move Cards between Groups](#)
 - [Associate / Re-Associate / Disassociate Card](#)
 - [Cards](#)
 - [Look Up Card Details](#)
 - [Block / Unblock a Card](#)
 - [Block / Unblock a Product](#)
 - [Replace Card](#)
 - [Cardholder Registration](#)
 - [E-vouchers](#)

- IV. [Generate Reports](#) (Pages 25-27)
 - [Report Descriptions](#)
 - [Report Login](#)
 - [Report Basics](#)
 - [Schedule a Report](#)

- V. [Appendices](#) (Pages 28-32)
 - [Appendix A](#): Actionlist: Action Needed to Complete Card Changes
 - [Appendix B](#): .XML and .CSV File Structure
 - [Appendix C](#): E-vouchers

I. BASIC NAVIGATION

LOGIN

To log in, go to orcacard.biz, enter your 4-digit business account ID number in the “Username” field, and then enter your password. Your business account ID is system-generated and cannot be changed.

Each business account has a single login. All authorized users will use the same login credentials and have the same level of access. Account login information should be distributed only to those needing access to your account for order processing or account management purposes.

RESET FORGOTTEN PASSWORD

If you forget your password, click **Login help?** on the login page, then click **Forgot your password?** on the next screen. This will take you to a “Reset password” screen.

To reset your password you will need your business account ID number and either:

- Your business name exactly as it appears on the website
- or-
- Your tax ID number (typically formatted as XX-XXXXXXX).

Your temporary password will be emailed only to the individual listed on your account under “Business Account Contact 1.”

If the system indicates that a new password was sent and you did not receive it in your email inbox, check your spam folder. If necessary, check with your IT staff to see if the email address contactus@orcacard.com has been filtered.

CHANGE PASSWORD

You may change the password for your business account by clicking **Update password** on your Welcome page. Click **Welcome** on the left navigation bar to navigate to the Welcome page.

CHANGE BASIC ACCOUNT INFORMATION

To review or change basic information about your agreement, such as contact names or phone numbers, click **Account details** on the left navigation bar after you have logged in.

There are two tabs at the top of this page:

- **Business account information** – may be used to review company name, tax ID and addresses. [Contact your lead agency](#) if any of this information needs to be updated.
- **Contact information** – may be used to edit contact information, add contacts (a maximum of four contacts may be listed), or view lead agency contact information.

Be sure to click **Save** on the bottom of this page to save any changes made.

FORGOTTEN BUSINESS ACCOUNT ID (USERNAME)

For help with a forgotten 4-digit business account ID number (username), [contact your lead agency](#)

and provide your business name and contact information. Your lead agency representative will then provide your business account ID. Lead agency representatives do not have access to your account password.

II. ORDERING CARDS AND PRODUCTS

Once your account is activated, you may order and refill cards using the business account website, orcacard.biz. Your payment method is configured in advance based on your selection. If you are paying by credit card (Visa or MasterCard only), orders are approved after the credit card transaction completes. If you are paying by check, orders are approved by the lead agency upon receipt of your check payment.

Initially, cards may be purchased with or without products (E-purse and/or pass) loaded onto them. Once cards have been received, you may load and reload them as needed.

ORDER CARDS

Follow these steps to order a supply of empty cards or cards preloaded with product(s). If you need to order a replacement card for a lost, stolen, damaged or defective card that has a valid product on it, please see [page 23](#) for instructions.

After you log into your account, your Welcome page will appear. The "My orders" box displays all current orders and their status (pending, approved, completed). If there are no orders, the list will be empty.

1. Select **Orders** from the left navigation bar.
2. Click **Get new cards**.
3. On the "Create New Card Order" screen, fill in the order details.
 - a. Select a branch name (in most cases, there will be one branch, the "Default Branch")
 - b. Select a group name
 - c. Enter the quantity of cards to be ordered
 - d. Enter an order description (optional)
 - e. Leave the card type as the default "Standard" (the only type available at this time)
 - f. If applicable, select "Card Printing Template and Personalization File." This feature is available at an additional cost and involves some pre-setup; contact your lead agency if you are interested in this option.
 - g. Identify passenger type:
 - i. Adult is the default passenger type.
 - ii. Youth cards require an expiration month and year (mm/yyyy). Please check with your lead agency to verify eligibility criteria and expiration limitations.
 - iii. Low income cards (ORCA LIFT) are available in limited service areas and require pre-approval. When ordering, you must provide an expiration date (mm/dd/yyyy). Please check with your lead agency for availability and eligibility criteria.
 - iv. Regional Reduced Fare Permit (RRFP) ORCA cards are not available for purchase through a business account. These cards are for seniors and people with disabilities, who must qualify for their own RRFP cards. If you wish to add value to an individual's RRFP, the card must be associated with your account first. Please refer to [page 18](#) for instructions on how to associate a card.

- h. Enter special handling instructions, such as shipping instructions, for fulfillment (optional)
 - i. Enter any notes into the "Notes Log" (optional – notes are not viewed by fulfillment staff).
 - j. Any card fee will be displayed.
4. Click **Next**. You will now be at the Create New Order – Add Products page. *If you are ordering empty cards, skip to step 7. If you are ordering cards preloaded with a specific product, proceed to step 5.*
5. Check the box next to the program type: **Business Passport Program** or **Business Choice**. If you have questions about your program type, [contact your lead agency](#).
6. Select the product(s) you want to have preloaded onto the cards. Selecting a product here will apply that product to all cards in the order. If you are loading a monthly pass, you must also select the pass month (e.g., October 2017). The cards will arrive with the product(s) loaded for use.
- Monthly passes can be loaded for the current month from the first day of the previous month through the 14th of the current month. Beginning on the 15th of the month, only passes for the following month may be loaded. The pass will pay fare during the month selected.
7. Click **Next**. You will now be at the Order Summary page. You will be given an order number, quantity of cards ordered and the total cost of the order.
8. Confirm the order by selecting **Shopping cart** from the left navigation bar. Check the box next to your order number and click **Confirm orders**. To cancel your order, click the box next to your order number and select **Remove from shopping cart**.
9. At the Confirm Current Orders page, select **Confirm** again:
- a. If paying by credit card: Your order will remain in your shopping cart and the order status will change to "Ready for payment." You may proceed with payment. See [page 10](#) for detailed payment information.
 - b. If paying by check: Your order will move to the Orders page and the order status will change to "Confirmed." Please submit payment as instructed by your lead agency. See [page 10](#) for detailed payment information.

Card orders are processed and shipped in 7 to 10 business days. If you are paying by check, once you confirm the order and remit payment, your lead agency must approve the order before it is processed and shipped. Approval will be complete once payment is received and processed. Once approved, an order cannot be changed.

Note: We recommend a lead time of two weeks when you order new cards preloaded with monthly pass products, to allow for processing and shipping.

ORDER PRODUCTS ONLY

Once you have your cards, you can add value as needed. If you are buying monthly passes, you will need to place an order each month. E-purse or e-vouchers may be ordered monthly or as needed.

All cards received must be tapped on an ORCA card reader within 60 days of the order to complete the product load.

To order products after you already have your ORCA cards:

1. Log into your account and then, from the Welcome page, click **Order products** at the bottom of the **My orders** box, or select **Orders** from the left navigation bar and then click **Order products**.
2. Check the box(es) for when you would like the system to send you an email notification:
 - a. **No email**
 - b. **Order fails validation**
 - c. **Order is ready for payment** (prepay only)
 - d. **Order is approved**

Emails will be sent to the default email address of the primary contact on the account. Enter the email address you would like the notification sent to, if different.

3. Enter a description (optional). This will show on the list of orders and can be helpful in distinguishing one order from another, such as "February passes" or "Feb. E-purse."
4. You have three choices to create your order:
 - a. Create a new order
 - b. Copy last order
 - c. Import an order from an internal spreadsheet. See "Import a Product Order" on [page 8](#).

CREATE A NEW PRODUCT ORDER

1. Click **Create** and you will be redirected to the Order Management – Select Cards page.
2. Select **Branch** name.
3. To load the same product(s) onto all cards in a group, select appropriate **Group Name** - *or*-
4. To load specific cards by serial number with the same product(s):

For a single card or a number of cards whose serial numbers are not sequential, enter the serial number(s) of the card(s) in the "From" field(s) only.

For multiple cards with sequential serial numbers, enter the serial number of the first card in the "From" field and enter the serial number of the last card in the "To" field. More than one range may be entered.

You can either select a group or enter card serial numbers on this page—not both.

If you have multiple cards that require different products, you may create an order for the first product(s) and then update the order, adding additional cards and products. Please review instructions on [page 9](#) – "Update Pending Orders."

5. Click **Next**. This will take you to the Create New Order – Add Products page, where all the products currently available for purchase on your account are displayed.
6. Check the box next to the program type: **Business Passport Program** or **Business Choice**. If you have questions about your program type, [contact your lead agency](#).

7. Select the products you want to load on card(s). If you are loading a monthly pass, you must also select the pass month (e.g., October 2017).

NOTE: Monthly passes can be loaded for the current month from the first day of the previous month through the 14th of the current month. Beginning on the 15th of the month, only passes for the following month may be loaded.

To ensure that the order can be processed in time, payment for monthly product orders should be made by credit card or received by check no later than the 25th day of the month for passes valid next month.

8. Click **Next** and the Order Summary page will display your order number, the order amount, and a message to “follow the instructions in the shopping cart.”
9. Click **Shopping cart** on the left navigation bar.
10. To confirm your order, check the box next to your order number and then click **Confirm orders**. If paying by check, print this page before proceeding to the next step. (To cancel your order, check the box next to your order number and then select **Remove from shopping cart**.)
11. On the Confirm Current Orders page, select **Confirm** again to begin the order validation process. Validation ensures that the product being ordered can be loaded to each card. The validation process may take up to six hours to complete.
12. After validation completes:
 - a. If paying by credit card: Your order will remain in your shopping cart and the order status will change to “Ready for payment.” You may proceed with payment. See [page 10](#) for detailed payment information.
 - b. If paying by check: Your order will move to the Orders page and the order status will change to “Confirmed.” Please submit payment as instructed by your lead agency. See [page 10](#) for detailed payment information.
 - c. Pending-ERRORS status: See [page 9](#) for detailed information on correcting errors.

Note: Once your order is complete, please allow 24 to 48 hours for the order data to reach ORCA card readers. The cards you receive must be tapped at an ORCA card reader within 60 days to load products.

COPY A PRODUCT ORDER

Another method of creating product orders is to copy the last approved or completed product order. This is particularly useful if you wish to duplicate an order to add E-purse funds to the same cards or to duplicate an e-voucher order. We do not recommend copying a pass product order as this would duplicate the pass month.

1. On your Welcome page, click **Order Products** in the “My Orders” box or select **Orders** from the left navigation bar, then click **Order products**.
2. Select **Copy**. This step will take you to the Order Summary page where you can verify or, if necessary, cancel the new order.

3. If you wish to proceed with the order, you must confirm and pay for it. Click **Shopping cart** from the left navigation bar, select the pending order and click **Confirm orders** to confirm.

If you are paying by credit card, your order is automatically approved after you confirm and successfully process payment; it does not require lead agency approval.

If you are paying by check, once you confirm the order and remit payment, your lead agency must approve it before it is processed. Once approved by the lead agency, the order cannot be changed. To get detailed payment information before placing your order, see [page 10](#).

IMPORT PRODUCT ORDER

An order that was previously exported and modified may subsequently be imported. This process duplicates a previous order (the same products, for the same cards).

You must have a completed product order on your account in order to use the export function. Once an order is completed (paid for), you may export it to your computer in your preferred format, and use it to develop your next month's order. You will need an .XML or .CSV editor to make changes to the file.

1. Review your file and update the exported .CSV or XML file format before importing. Verify card numbers, delete cards that have been blocked or replaced, and add new cards as needed. Update products, if necessary, and the pass month if you are ordering monthly passes. See additional information and sample file formats in [Appendix B](#).
2. On your Welcome page, click **Order products** in the "My orders" box or select **Orders** from the left navigation bar, then click **Order products**.
3. On the Order Products page, select **Browse...** and select the **exported product** order file from your saved files.
4. After selecting the file, click **Import**. This step will take you to the Order Summary page where you can verify or, if necessary, cancel the new order.
5. To proceed with the order, you must confirm and pay for it. Click **Shopping cart** from the left navigation bar, select the pending order, and click **Confirm orders** to confirm.

EXPORT PRODUCT ORDER

If you wish to duplicate an order in the future (the same products, for the same cards) you can easily export the order to create a file for import.

To export and save pending, confirmed, approved or completed orders for later:

1. Select the order that you wish to export:
 - a. **Select Pending orders** from the Shopping cart
 - b. **Select Confirmed, Approved or Completed orders** from the Orders page
 - c. Click the underlined order number.
2. Selecting the order takes you to the Order Summary page. From there, select a file type from the drop-down list next to the **Export Order** button. The file can be saved as either .XML or .CSV. See sample file formats in [Appendix B](#).

3. Select **Export Order**, then save the file on your computer.

See "Import a Product Order" on [page 8](#) for information on changing an exported order, before re-importing.

UPDATE PENDING ORDERS

Pending product orders may be modified, either to place a single product order for multiple cards that require different products, or to remove cards from the order.

1. Click **Shopping cart** in the left navigation bar and click the underlined order number.
2. On the Order Management page, click the **Order Management** tab near the top of the page (second tab) and you'll be redirected to the Order Management – Select Cards page. From here you may add or remove cards and/or products from the original order

To add one or more cards and products to the original order:

- a. Enter the card number(s) or groups you wish to place an order for. You can add more ranges by clicking **Add card range**.
- b. Click **Add Products** and add as you would for any other order.
- c. The order will go back to your Shopping Cart page.

To delete cards or product(s) from an order:

For example, if you placed an order for a large group of cards, but want to remove one of those cards from the order:

- a. Enter the card number(s)
- b. Select **Remove Cards** or **Remove Products**

You may repeat this process as often as necessary to complete the order.

Finishing the order

When you are done updating the order, go back to the Shopping Cart and **Confirm** the order. (Note: You may view complete details of the updated order by clicking the order number first.)

You may also completely cancel orders. Check the box next to the appropriate order and click on **Remove from shopping cart**.

CORRECTING AN ORDER VALIDATION ERROR

If your order fails to confirm following the validation process, the **Order Status** will show "PENDING WITH ERRORS."

To view the error message and correct the order:

1. Click the underlined order number in your Shopping Cart.
2. Click the **Errors** tab at the top of the Order Management page (fourth tab).
3. All errors on the order will be listed.
4. These are the most common error messages:

- a. "(Product) is not available for card XXXXXXXX because no validity periods are available." This occurs when a similar product for the same month has already been ordered for the card.
 - b. "Products cannot be ordered for blocked card XXXXXXXX." Card is blocked and should be removed from order.
 - c. "The minimum E-purse value allowed is \$0 and the maximum E-purse value allowed is \$300 for card XXXXXXXX." This occurs when the amount of E-purse being added to the card's existing balance and any recent unredeemed E-purse results in an E-purse balance that exceeds the maximum limit of \$300.
5. Click the **Order Management** tab at the top of the page (second tab) to correct the errors, e.g., remove a card with a duplicate product order or remove a blocked card, then re-save the order and the total cost will be recalculated
 6. If all errors have been corrected, **Confirm** the order in your Shopping Cart.

PAY FOR YOUR ORDER

Paying for your order may differ depending upon the type of account you have.

BUSINESS CHOICE ORDERS – MAKING PAYMENT

All Business Choice orders require prepayment, and the primary forms of payment are credit/debit card (Visa or MasterCard accepted only) or company check. You select your preferred payment method when you sign up for your business account, and it may be updated by [contacting your lead agency](#). Your current payment method is displayed in the "My company's details" box on your home page.

If paying by credit or debit card (Visa or MasterCard only), you will process your payment after your order has been confirmed via the website. Debit cards will be treated as credit cards; no PIN number will be entered.

1. Go to your **Shopping Cart**. Select the confirmed order (order status will be "Ready for payment") and click **Process Payment**.
2. A credit card payment screen will appear; complete all requested information. The name on the credit card and the billing address must match what the issuing bank has on file.
3. Click **Make Payment** (click one time only).
4. A credit card authorization receipt will display if the transaction is successful. Print if you need a copy. The system will not retain this document for future printing.

Once payment is successful, your order will be approved. Each time you place an order you'll need to enter the card information. The ORCA system does not retain credit card information after an order is processed. If at a later time you wish to use another form of payment, [contact your lead agency](#).

APPROVING A CHECK OR MONEY ORDER PAYMENT

If you are paying with a check or money order, print your Shopping Cart page before confirming the order(s), and mail the printed information with a check or money order to the payment address designated by your lead agency. Once your order summary and payment are received, your order will be approved. Your check payment must be received by your lead agency no later than the 25th of the

month (for February, we recommend the 23rd) to ensure that products are usable by card readers by the first day of the pass month.

After card orders are approved, you can expect to receive them in 7 to 10 business days. Product orders may take up to 48 hours to load.

PASSPORT ACCOUNTS

Your lead agency determines payment requirements for Passport Agreements. Typically, once your agreement is approved, an invoice will be generated according to the terms of your agreement and mailed for payment. Timely payment is required to maintain an active agreement.

AUTOLOAD

Autoload is not available on the business accounts website, and any ORCA card associated with a business account is not eligible for Autoload on the Cardholder website except to set e-voucher settings. See [Appendix C](#) for information on e-voucher settings. The business account representative should provide this information to each individual as the card is issued.

III. CARD MANAGEMENT

Card management functions allow you to organize cards for easier product ordering and reporting, to replace lost cards, and to block and unblock cards as needed.

Branches are the first level of grouping cards. We recommend using the default branch and group created for you in the system unless you have a strong business need to create a more complex structure. Your account must have at least one branch and one group. Most business accounts use a single branch for all of their cards.

The second level of grouping is to organize cards into smaller card groups. Possible uses for card groups include:

- Groups based on product type (when the same product is needed for multiple cards), which can simplify product ordering.
- A “blocked” or “inactive” group that you can move blocked cards into, to keep them separate from your active cards.

A card can be in only one branch and one group at a time, though you can move cards between branches and groups as needed. Thinking through how best to use the branch and group structure before setting them up may simplify ongoing administrative tasks associated with your account.

Some specific actions are needed to manage branches and groups. For example, a card must be tapped on an ORCA card reader within 60 days to complete a card group update. See [Appendix A](#) for more details on actionlists.

BRANCHES

CREATE A BRANCH

1. Select **Branches** from the left navigation bar.
2. Click **Create branch** on the Branches page.

3. Enter the branch name (the default address is the existing delivery address on your account. Contact your lead agency if your delivery address needs to be updated). Leave "Special Instructions" blank.
4. Click **Create branch** at the bottom of the page when you are finished.

The screen will refresh with a green "Success" message indicating the branch was added. The system will also automatically create a new group based on the branch name. Use the "Back" button or the left navigation bar to move to a different page.

Note: Wait 24 to 48 hours before ordering cards for, or moving cards to, any newly created branch and group. If you move cards before this time period, any products on the cards will be unavailable until the move is complete.

After moving cards to a branch and group, wait another 24 to 48 hours, then tap the cards at an ORCA card reader within 60 days to associate to this branch (tapping is not necessary when new cards are ordered for the branch). Once the cards have been tapped, you may order products (E-purse or pass) for those cards. Any products on the cards at the time you move them should remain unaffected.

UPDATE BRANCH DETAILS

1. Select **Branches** from the left navigation bar.
2. Select the branch you wish to update by **clicking the box** next to that branch on the Branches screen.
3. Click **Update branch**.
4. Make any necessary changes.
5. Click **Update branch** at the bottom of the screen when you are finished.

The screen will refresh with a green "Success" message indicating the branch was updated. Use the Back button or the left navigation bar to move to a different page. There is no waiting period or tapping requirement to update a branch.

REMOVE A BRANCH

While it is possible to remove a branch, we advise you not to do so. If you do need to remove a branch, please note the following:

- You cannot remove a branch if groups in that branch have cards assigned to it. If you try to remove a branch that has cards in groups within the branch, you will receive an error message.
- Removing a branch will automatically delete groups within that branch.
- Make sure that all cards assigned to a branch and group that you wish to remove have been moved to another branch and group, and have been tapped at a card reader (within 60 days).

See **Note** under **CREATE A BRANCH** about moving cards between branches.

After all cards have been moved out of the branch and group you are trying to remove, and have been tapped at an ORCA card reader, you can remove the branch using the instructions below:

1. Select **Branches** from the left navigation bar.
2. **Select** the branch to be removed.
3. Click **Remove branch**. Review the confirmation page carefully.
4. Click **Confirm** to permanently delete the selected branch.

The screen will refresh with a green "Success" message indicating that the branch has been removed and listing the remaining branches. Use the left navigation bar to move to a different page.

GROUPS

You can use card groups to simplify product ordering or card management functions, such as organizing blocked cards. A group is a subset of a branch. A single default group is created within the default branch when your account is activated. Group names can be reused in different branches, but a card can be in only one group and one branch at a time.

This section covers how to create, rename and remove groups; block and unblock groups; importing and exporting; and moving cards between groups.

CREATE GROUPS

1. Select **Groups** from the left navigation bar. All groups on the account will display.
2. Select a **Branch** from the drop down menu. The new group will only appear under that Branch.
3. Click **Create group**.
4. Enter a **Group Name** and **Description**. The group name must be alphanumeric. The field will not accept special characters.
5. Click **Create group**.

The screen will refresh with a green "Success" message indicating that the group was added. If you get an error, change the group name or description to alphanumeric characters. Use the "Back" button or click in the left navigation bar to move to a different page.

Note: Wait 24 to 48 hours before ordering cards or moving cards into a new group. If you move cards earlier, products on the cards will be temporarily unavailable.

After moving cards to a group, wait another 24 to 48 hours, then tap the cards at an ORCA card reader within 60 days to associate to this group. (Tapping is not necessary when you order new cards into the group). Once the cards have been tapped, you may order products for those cards. Any products on the cards at the time you move them should remain unaffected.

REMOVE GROUPS

While it is possible to remove a group, we advise you not to do so. If you do need to remove a group, please note the following:

- You cannot remove a group if cards have been assigned to it. If you try to remove a group that contains cards, you will receive an error message.
- Make sure that all cards assigned to the group that you wish to remove have been moved to another group, and have been tapped at a card reader within 60 days. **See Note under CREATE GROUP about moving cards between groups.**
- Cards previously disassociated cannot be re-associated if you delete the group. [Please contact your lead agency](#) if you have questions before removing a group.

After all cards have been moved out of the group you are trying to remove, and have been tapped at an ORCA card reader, you can remove the group using the instructions below:

1. Select **Groups** from the left navigation bar. All groups on the account will display.
2. **Select** the group to be removed.
3. Click **Remove group**. You will be taken to a confirmation page, where groups designated for removal will be listed. Review this page carefully.
4. Click **Confirm** to delete designated groups. After you click confirm, the group will be permanently deleted.

The screen will refresh with a green "Success" message indicating the group was removed. Use the left navigation bar to move to a different page.

RENAME GROUPS

1. Click **Groups** from the left navigation bar. All groups on the account will display.
2. **Select** the group to be renamed.
3. Click **Rename group**.
4. Type the new group name and description. The group name must be alphanumeric. The field will not accept special characters.
5. Click **Update**.

The **Groups** page will refresh; all groups will be in alphabetical order. Use the left navigation bar to move to a different page. There is no waiting period or tapping requirement to rename a group.

BLOCK CARD GROUPS

Cards in a group may be blocked individually (recommended) or you may block the entire group. For example, when employees leave the company, the business may move a card to a group for former employees and block that entire group of cards. If you do need to block a group, please note the following:

- Blocking a group has the same effect as blocking cards individually—it prevents those cards from being valid for fare payment. However, the card status for each of the cards in the group will display on the **Card Account Details** page as “Active.”
- Cards will remain invalid until they are no longer in a blocked group.
- We advise you to block and unblock individual cards from the Card Account Details page instead of blocking groups, because individual card blocks generate an actionlist. See [Appendix A](#) for details on the actionlist process.

Please [contact your lead agency](#) with your questions before blocking card groups.

1. Select **Groups** from the left navigation bar. All groups on the account will display.
2. Select the group to be blocked.
3. Click **Block group** (at the bottom of the page).
4. Select a reason for blocking the group using the drop down menu. The recommended blocking reason is “Other.” Groups blocked with a reason of “Permanent” cannot be unblocked.
5. Click **Confirm**.

The screen will refresh with a green “Success” message indicating that the group was blocked.

UNBLOCK CARD GROUPS

If a group was blocked temporarily, it can be unblocked on the business account website. Groups blocked with a reason of “Permanent” cannot be unblocked.

1. Select **Groups** from the left navigation bar. All groups on the account will display.
2. **Select** the group to be unblocked.
3. Click **Unblock group** (link at the bottom of the page).
4. Click **Confirm**.

The screen will refresh with a green “Success” message indicating the group was unblocked. Cards in the unblocked group will be valid if the card status is “Active.” The group status and card status must remain “Active” for a card to be valid.

EXPORT A CARD GROUP

1. Select **Groups** from the left navigation bar. All groups on the account will display.
2. **Select** the group to be exported.
3. Click **Export group** (link at the bottom of the page).
4. A pop-up for an .xml file will ask if you want to **Open** the file on the screen or **Save** the file.
5. Click **Save** to save the file on your computer.

IMPORT A CARD GROUP

If you are moving large numbers of cards between groups, regularly blocking or unblocking batches of cards, or assigning cards to groups from an internal system for tracking benefits, you may want to use the import/export function.

1. Select **Groups** from the left navigation bar. All groups on the account will display.
2. Click **Import Group** at the bottom of the page and the Upload Card Group File page will display.
3. Click **Browse...** and locate the .XML file to be imported.
4. Provide a file name.
5. Click **Upload File**.

The screen will refresh with a green "Success" message indicating that the file was uploaded.

MOVE CARDS BETWEEN GROUPS

Cards can be moved between groups, either within the same branch or within other branches. A single card may be moved on the Card Account Details page by selecting **Move Card**, or on the page under Manage ORCA on the left navigation bar. Please note the following when moving cards between groups:

- When creating a new card group, wait 24 to 48 hours before moving cards to the new group. Cards will become temporarily disabled if moved to the new group earlier.
- After cards are moved to a group, they must be tapped at a card reader after 24 to 48 hours, but within 60 days. If they are not tapped, the move will not be completed and any product ordered for that group will not load.
- Moving a card from an active group into a blocked group will stop that card from being valid. Move the card to an active group if you want it to be valid. Moving a card from a blocked group to an active group will make the card valid only if the card status and group status both say "Active" on the Card Account Details page, and only after the card is tapped at a reader to update the active group.

MOVE CARD FROM CARD ACCOUNT DETAILS PAGE

1. Select **Cards** from the left navigation bar.
2. **Enter** the card serial number in the "Search by card serial number" box.
3. Click **View**.
4. Click on the **Card Serial Number**. The group the card is in will display next to "Group."
5. Click **Move Card** on the Card Account Details screen. The Groups – move cards page will be displayed, including all cards in the card's existing group.
6. Use the drop-down list to select the branch and group where the card will be moved.
7. **Select** the card serial number. (The **Save current selection** button may be used if there are multiple pages of cards in the group. Clicking the button will save the selection of card serial

numbers that have been checked on the page and allow you to move to the next page to select other card serial numbers.)

8. Click **Move**. The Groups – move cards confirmation page will be displayed.
9. Click **Move** to complete the move.

The screen will refresh with a green “Success” message indicating that the card(s) were moved from their previous group.

NOTE: Blocked cards cannot be moved from the Card Account Details page. To move a blocked card from one group to another, please follow the instructions below.

MOVE CARD FROM GROUPS PAGE

1. Select **Groups** from the left navigation bar. All groups on the account will display.
2. **Select** the group where the cards are currently located.
3. Click **Move card between groups** (near the bottom of the page). The Groups – move cards page will be displayed. Use the drop-down list to select the branch and group where the cards will be moved.
4. **Select** the card serial number(s) *–or–* **Select all cards in the group**. (The **Save current selection** button may be used if there are multiple pages of cards in the group. Clicking the button will save the selection of card serial numbers that have been checked on the page and allow you to move to the next page to select other card serial numbers.)
5. Click **Move**. The Groups – move cards confirmation page will be displayed.
6. Click **Move** to complete the move.

The screen will refresh with a green “Success” message indicating that the card(s) were moved from their previous group.

ASSOCIATE A CARD

You can add a personal card to your business account using the “Associate a card” function. (Cards previously associated with another business account cannot be associated to your account.)

1. Select **Groups** in the left navigation bar. All groups on the account will display.
2. **Select the group** in which you want to add the card.
3. Click **Associate a card** and you’ll be taken to the Add Card to Group screen.
4. Enter the **Card Serial Number** (eight digits, located in the lower left corner of the card) and the **Card Verification Number** (three digits, located in the lower right corner of the card). You must have both sets of numbers to associate a card to your business account.
5. Click **Add Card** to complete the action.

Note: Tap the card at an ORCA card reader 24 to 48 hours after you associate the card to complete the transaction. 24 to 48 hours after you tap the card, it will appear on your account and will then be ready for you to add a product.

RE-ASSOCIATE A CARD

You can add a card you had previously disassociated from your business account. A card can only be re-associated to its original business account. You cannot re-associate a card originally issued to another business account.

The card must be re-associated to the last group it was in.

1. Select **Groups** from the left navigation bar. All groups on the account will display.
2. **Select the group** in which you want to add the card.
3. Click **Re-associate card(s)** and you'll be taken to the Re-associate Card(s) screen.
4. Enter the **Single card serial number** (eight digits, located in the lower left corner of the card) or **Range of serial numbers**.
5. Click **Re-associate** to complete the action. (Tap card as noted above to associate a card.)

DISASSOCIATE A CARD

Though not recommended, business accounts, at your discretion, may choose to disassociate cards to allow cardholders to keep cards for their personal use.

When a business account chooses to disassociate a card, it is their responsibility to:

- Collect any value belonging to the business from the cardholder.
- Remove the card from any pending or confirmed orders.

Once disassociated, the card will no longer be visible on the business account website. Even if a card (or group of cards) is not visible on the business account website, the card numbers may continue to appear on reports generated for the account. The card must be tapped within 60 days after processing to complete the disassociation. The E-purse will continue to function.

NOTE: Disassociation is not recommended for Passport accounts. [Contact your lead agency](#) with any questions.

Card disassociation will result in the following:

- Passport and any monthly passes purchased by the business account will no longer function. However, Passport will continue to display on the cardholder details page (for cardholders who sign up for a cardholder account and register their card to the account), as will PugetPass through the end of the valid month.
- E-purse will continue to function.
- Any e-voucher set up as automatic will redeem (load to the card) even after disassociation.
- Any e-voucher set up as remote on the card will not redeem (load to the card) if not done before disassociation.

- A cardholder can view what is on the card by registering their card and creating a My ORCA login at orcacard.com. As noted above, Passport and PugetPass will continue to display, as well as product(s) loaded by the cardholder and transaction history.
- If a card was registered by an individual prior to disassociation, that registration will continue to be in effect.
- Cardholders can register the card to themselves at any time, before or after disassociation (and before or after a business account termination).
- Once a card is disassociated, if it is not registered by the cardholder and is lost or damaged, it will not be eligible for replacement.

To disassociate a single card

1. Select **Cards** from the left navigation bar, enter the **Card Serial Number** and select "View." Click on the card serial number.
2. On the Card Account Details screen click **Disassociate Card**.
3. A confirmation page, "Confirm the disassociation of the following card," will display. Read carefully, then click **Confirm**. A success message will indicate that this has been completed.
4. Tap the card at an ORCA card reader after 24 to 48 hours, but within 60 days, to complete disassociation.

To disassociate a range of cards

1. Select **Cards** from the left navigation bar, but do not enter any card information.
2. Click **Disassociate Card(s)**.
3. On the next screen, **enter a consecutive range of cards** in the "From" and "To" boxes. You can enter multiple ranges. Do not select from the "Groups" drop-down menu if you do not want to disassociate the entire group.
4. Click **Disassociate**. A confirmation page, "Confirm the disassociation of the following card range(s)," will display. Click **Confirm**. A success message will indicate that this has been completed.
5. Tap cards at an ORCA card reader after 24 to 48 hours, but within 60 days, to complete disassociation.

To disassociate a group of cards

1. Select **Cards** from the left navigation bar, but do not enter any card information.
2. Click **Disassociate Card(s)**.
3. On the next screen, **select a group name** in the drop down box for "Groups."
4. Click **Disassociate**. A confirmation page, "Confirm the disassociation of the following group," will display. A success message will indicate that this has been completed.

5. Tap cards at an ORCA card reader after 24 to 48 hours, but within 60 days, to complete disassociation.

To disassociate a large group of nonconsecutive cards via an import file

You must first create and export a file of cards in .XML or .CSV format. Please see [Appendix B](#) for details.

1. Once the file is exported, using the appropriate file editor, make any changes necessary to the file, and save it.
2. **Log in** to the business account website.
3. Select **Cards** from the left navigation bar, but do not enter any card information.
4. Click **Disassociate Card(s)**.
5. On the Disassociate Card(s) screen, click **Browse** for the newly saved file where indicated, then **Upload File**.
6. You will see a message to confirm the disassociation and notes explaining the impacts of doing so. You can also enter an email address for notification that disassociation process has been completed.
7. Click **Confirm** to complete the process.
8. Tap cards at an ORCA card reader 24 to 48 hours after process completion, but within 60 days, to complete disassociation.

CARDS

A business can look up card details to see products on cards, block and unblock individual cards or individual products on cards and replace lost or damaged cards. These actions occur through the actionlist process. See [Appendix A](#) for details on the actionlist process.

LOOK UP CARD ACCOUNT DETAILS

1. Select **Cards** from the left navigation bar.
2. **Select the card** using any of the following search criteria:
 - a. A specific card serial number
 - b. Groups
 - c. Card status (e.g. active or blocked)
 - d. Type of product on the card
3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.
4. **Click on the serial number** of the card to see details.
5. The "Card Details" and "Card Order History" tabs will display.

Card Details Tab

This tab provides detailed information on a card: card status, passenger type, group, incomplete or in progress order, products on card. This screen also has options to block (or unblock), move, replace, add products, or disassociate the card.

Card Order History Tab

This tab provides detailed information on products ordered for card. Enter from and to dates in the "Date Created" or "Expiration Date" fields. For "Redeemed" and "Product," choose from the drop-down arrow as needed. Click "Show orders." A list of orders will display, along with the date created, order number, product, value, expiration date and if redeemed (Y = Yes, N = No). Click on the order number for details of the original order.

A product that displays as "Purse (Reactivated)" means the E-purse value from the original order was not redeemed within the 60-day window and that order has been reactivated. The "Purse (Reactivated)" entry will reference the original order number.

BLOCK A CARD

A business account can block a card for the following reasons:

- Card is lost/stolen or has not been returned by a former employee.
- Card is damaged or defective.

Blocking an individual card blocks all products loaded on that card.

The recommended blocking reason is "Other." Cards blocked with a "Permanent" reason cannot be unblocked.

Do not block a card if you intend to replace it or transfer funds. Please refer to [page 23](#) for card replacement procedures.

1. Select **Cards** from the left navigation bar.
2. **Enter the card serial number.**
3. Click **View**.
4. Card Account Details – for card "xxxxxxx" will appear.
5. Click **Block Card**.
6. Select the **reason** for blocking the card from the drop-down menu. We recommend that you not block cards with a reason of "Permanent" because they cannot be unblocked.
7. Click **Confirm** to complete the block card action. The Card Account Details screen display will indicate the card status as blocked.

UNBLOCK A CARD

You may unblock a card that has previously been blocked if the card has not been transferred or blocked with a "Permanent" reason (e.g. lost/stolen).

1. Select **Cards** from the left navigation bar.
2. **Enter the card serial number.**
3. Click **View**.
4. Card Account Details – for card “xxxxxxx” will appear.
5. Click **Unblock Card**.
6. Click **Confirm** to complete the unblock card action. The Card Account Details screen will display and indicate that the card status is active.

Note: This card must be tapped at an ORCA card reader 24-48 hours after the unblocking request is submitted, but within 60 days to complete the unblocking action.

BLOCK A PRODUCT

It is not necessary to block product(s) on a card if you have already blocked or intend to block the card. While it is possible to block a product, this function is seldom used.

Note: There are no refunds for a blocked product. We recommend that a company collect cards from employees who leave and reissue them to other employees as needed rather than blocking a product.

1. Select **Cards** from the left navigation bar.
2. **Enter the card serial number.**
3. Click **View**.
4. Card Account Details – for card “xxxxxxx” will appear.
5. Click **Block/Unblock Products** at the bottom of the page.
6. **Select the product(s)** you want to block, then click **Blocked** for those product(s).
7. Select a **Blocking Reason** from the drop-down menu.
8. Click **Update** at the bottom of the page.
9. You will receive a message asking if you are sure you want to block/unblock the product. Click the appropriate answer.
10. The screen will refresh with a green “Confirmation” message indicating that the selected product(s) have been actionlisted to be blocked. See [Appendix A](#) for details on the actionlist process.

Note: This card must be tapped at an ORCA card reader 24 to 48 hours after the blocking request is submitted, but within 60 days to complete the blocking action.

UNBLOCK A PRODUCT

A business account representative can unblock product(s) that have previously been blocked.

1. Select **Cards** from the left navigation bar.
2. **Enter the card serial number.**
3. Click **View**.
4. Card Account Details – for card “xxxxxxx” will appear.
5. Click **Block/Unblock Products** at the bottom of the page.
6. Select the product(s) you wish to unblock. Click **Unblocked** and type in a reason for unblocking (optional).
7. Click **Update**.
8. You will receive a message asking if you are sure you want to block/unblock the product(s). Click the appropriate answer.
9. The screen will refresh with a green “Confirmation” message indicating that the selected products have been action listed to be unblocked. See [Appendix A](#) for details on the actionlist process.

NOTE: This card must be tapped at an ORCA card reader 24 to 48 hours after the unblocking request is submitted, but within 60 days to complete the unblocking action.

REPLACE CARD

If a business account card is lost, stolen, damaged, or defective, it can be replaced. The replacement process will transfer all valid products (pass and/or E-purse) to an empty card. The replacement cost is the current fee for an ORCA card (\$5), unless you have a supply of empty cards. If a card is defective, and is within the 12-month warranty period, the replacement fee will be waived. Please surrender the card to your Lead Agency so they can determine if a card is defective.

The replacement steps outlined below are for adult cards that are associated with your business account. The process will automatically and permanently block the original card. Additional guidelines apply to replace a youth, ORCA Regional Reduced Fare Permit (RRFP) or ORCA LIFT card, as follows:

- **Youth card:** You may replace a youth card (for ages 6-18) with an existing empty youth card in your inventory only if the card has the same expiration date and is associated with your business account. If no appropriate card is in inventory, you must replace a youth card with a new card (see step 5, first bullet).
- **ORCA Regional Reduced Fare Permit (RRFP):** If you need to replace a Regional Reduced Fare Permit (for persons 65+ or with a disability) you must order a new replacement card (see step 5, first bullet) or [contact your lead agency](#) for assistance. All data and products from the original RRFP will transfer to the replacement RRFP. Individuals with an expired RRFP must apply for a new one through a transit sales office. Please note that for RRFPs that require a photo, if the photo is not on file in the ORCA Regional Mail Center, the replacement RRFP must be issued in person.
- **ORCA LIFT card:** You may replace a LIFT card (issued by King County Metro only) to an existing empty LIFT card in your inventory only if the card has the same expiration date and is associated with your business account. If no appropriate card is in inventory, you must replace a LIFT card with a new card (see step 5, first bullet).

Note: If you have placed an order to add product to the card being replaced and the order is in a pending or confirmed status, an error message will display if you attempt to replace the card. **You must remove the card being replaced from the order (or cancel the order) before replacing it.**

1. Select **Cards** from the left navigation bar.
2. **Enter the card serial number** to be replaced and click **View**.
3. **Click on the card serial number** (shown on the lower left of screen).
4. Click **Replace Card** (you should be on the card details tab; if the card is blocked, you must first unblock).
5. Select the option you wish for replacement:
 - If you are using a new card provided by ORCA, go to steps 6-8 (you will pay the \$5 card fee by credit card—Visa or MasterCard). If paying by check, please [contact your lead agency](#) for assistance).
 - If you are using a card from **existing inventory**, go to steps 9-12 (you must have a never-used, empty card in stock, with no product or transaction history).

NEW CARD:

6. If you are paying by credit card, complete all requested information when the payment screen appears. The name and billing address on the credit card must match what the issuing bank has on file.
7. Click **Make Payment** (click one time only).
8. The credit card receipt will display if the transaction is successful. Print if a copy is needed. The system will not retain the receipt for future printing.
9. The original card is permanently blocked. Your replacement card will be shipped to the delivery address on file for your account in a few days. Any pass products will be automatically transferred to the new card. E-purse will transfer in 8 to 10 days. The new card be tapped at an ORCA card reader after that period but within 60 days to load the funds.

EXISTING CARD:

10. Replace with an existing never-used, empty card with no product or transaction history.
11. **Enter destination (new/empty) card serial number.**
12. Click **Confirm**. Confirmation of your transaction will appear. Print for your records; the system will not retain this screen.
13. Tap replacement card at an ORCA card reader after 24 to 48 hours to download pass data. E-purse will transfer in 8 to 10 days. The new card must be tapped at an ORCA card reader after that period but within 60 days to download the funds.

14. The original card is now blocked permanently. The card status on the Card Account Details page will display as "Blocked: Replaced." The "Products on Card" will show a status of "N/A" and the "Remaining Value" as "Transferred."

CARDHOLDER REGISTRATION

Individual cardholders may manage their business account ORCA cards online by registering their card at orcacard.com. After their online account is set up, cardholders may review the products loaded on the card (E-purse and/or pass), load additional products and/or E-purse value, and check their transaction history. E-purse value cannot be used to pay for an ORCA product online.

Note: ORCA cards purchased by or associated with a business account are the property of that business. **Any products purchased directly by the cardholder also become the property of the business.**

Cardholders must report any issues with their cards to the business and the business should [contact their lead agency](#) for assistance. No refunds can be issued to a cardholder by the lead agency. Refund requests must be made by the business to the lead agency (for E-purse only; passes are non-refundable), and the card must be permanently surrendered for refund processing. Lost, damaged or stolen cards should be reported to the business for replacement processing, if necessary.

E-VOUCHERS

E-vouchers may be purchased only by business accounts with a pre-existing E-voucher Program. An e-voucher allows a business account to provide funds on an ORCA card that can then be redeemed automatically (to the card's E-purse) at an agency customer service center, a retail location, a ticket vending machine, or online. More information can be found in [Appendix C](#).

IV. GENERATE REPORTS

A business account can generate the following reports:

- Expired Vouchers
- Institutional Card Status
- Institutional Linked Ridership Summary
- Institutional Transaction History
- Institutional Unlinked Ridership Summary
- Unredeemed Products

These additional reports that you will see listed are either not available or are available only to particular accounts:

- Institutional Card Account Transaction History – only for WSF Commercial Accounts
- Institutional Card Group Management – only for University of Washington
- Institutional Vanpool Subsidy Status – not currently available
- Institutional Vanpool Usage – not currently available

Note: Due to privacy concerns, none of the ridership reports include card serial numbers. Be aware that if cards are disassociated from the business account and no longer appear on the list of cards, those card numbers may continue to appear on reports (below) because the history of the card(s) remains in the system.

REPORT DESCRIPTIONS

- **Expired Vouchers:** Determines the total amount of expired e-vouchers for a particular month and year.
- **Institutional Card Status:** Displays the number of cards that have products loaded but are not currently in use, the cards that are in circulation but have no activity recorded against them within the current month, the cards that have been registered to an individual, all blocked cards as of the current point in time, and all active cards.
- **Institutional Linked Ridership Summary:** Provides a summary of linked trip ridership statistics.
- **Institutional Transaction History:** Lists transaction data for business account cards (no serial numbers).
- **Institutional Unlinked Ridership Summary:** Provides detailed unlinked trip ridership statistics.
- **Unredeemed Products:** Provides details of products that were ordered, but not redeemed, during the billing period or the agreement period. These products include vouchers that are not redeemed because cardholders did not tap their cards within the required timeframes.

REPORT LOGIN

A business account can access the reports portal by logging in to the business account website (orcacard.biz) and clicking **Launch report generator** on the left navigation bar.

On the Reports login page, the user name is the 4-digit business account ID number, and the password is the same as the business account website password. Update the following entries if they are different:

System: **VIX-KC-CAS-001:6400**
Authentication: **Windows AD.**

Once you log in, select the **Documents** tab, then click **Folders**, double-click **On Demand** and, finally, double-click **Institutions** to access your list of reports.

REPORT BASICS

To get started, **right-click** on any report, or highlight the report and click **More Actions** to see a drop-down menu with options. The options are:

- **View:** Instantly run a report. For some reports, you will be prompted to enter various parameters (e.g., date range). You can view the report on screen, print it, or export it.
- **Properties:** Provides a short description of the report including the dates the report was last run or modified.
- **Categories:** Business accounts can create subcategories for storing certain reports. This feature is probably unnecessary for most users.

- **Schedule:** Use this parameter to schedule the report to run now, at some future time, or on a periodic basis. You have many options to customize the report using this option, including applying filters and having the report automatically emailed after it is run.
- **History:** Past reports will be stored and you can select one to view using this option.
- **Details:** Describes the report.
- **New, Add, Organize:** Additional options that may be displayed, but are not applicable for business accounts reports.

SCHEDULE A REPORT

Right-click on the report you would like to run, or highlight the report and click on **More Actions** and then click **Schedule**. Specify all the options for the report you'd like to run as follows:

- **Instance Title:** Edit the provided title if you would like something that is more meaningful to you.
- **Recurrence:** Specify when you would like the report to run. The most commonly chosen option is "Now," but you can also choose to have a report run automatically at certain frequencies.
- **Prompts:** Click **Edit Values** to fill in the report parameters. This step is critical because you need to fill in a value for each parameter or the report will not run.
- **Formats:** Choose the file format you would like for the report. Microsoft Excel (97-2003) (Data Only) or Separated Values (CSV) works well for data analysis. PDF works well for presentations.
- **Destinations:** Choose where you'd like the file delivered. The "Default Enterprise Location" will save the file in the history for that report. Select "Email" to have the file emailed directly to you. Enter the "from" address as anything that makes sense to you and won't get rejected by your email system (most users enter their own email address). The "to" field is for the email address where you'd like the report sent. In most cases, both the "from" and "to" email addresses will be your email address.
- **Filters, Print Settings, Events and Scheduling Server Group:** These are all options that are displayed, but are non-applicable for business account users.

Once you have specified all your options, click **Schedule** in the lower right corner. The report will begin running and will say "complete" when finished or will send an email, depending on the options you specified.

V. APPENDICES

APPENDIX A – ACTIONLIST: ACTION NEEDED TO COMPLETE CARD CHANGES

Most changes you make to your ORCA cards from the business account website require the card to be tapped at an ORCA card reader before the action can be completed.

Examples of changes include:

- Blocking or unblocking cards
- Moving cards between groups and branches
- Adding product and/or E-purse value to a card
- Disassociation of a card.


Remember, to complete/activate a change made from the business account website, the following must also happen:

- An ORCA system download (downloads happen twice daily, at approximately 2 a.m. and 2 p.m.)
- ORCA readers must receive the change message (takes 24 to 48 hours)
- Cards must be tapped (usually 48 hours after change is initiated).

Cardholders may tap their ORCA cards to complete the change as shown in the following matrix. The change in this example is the addition of value. The text shows how the reader display confirms that the change has taken place

Reader Location	Reader Display Example
On a bus	<p>Pass \$X.XX* "Added Pass" \$X.XX</p> <p>*Amount listed will be the monthly pass value; the value shown for an annual Passport Pass is \$0.00</p>
WSF turnstile	Card will update, but no message will display.
Stand-alone readers (e.g., yellow devices at train, rail, SWIFT and RapidRide stations)	<p>International District (location), 01/04/2010 (date) Fare paid \$X.XX "Card Revalued"</p> <p>NOTE: If using the stand-alone simply to activate a change with no trip, tap off after reading the message to cancel your trip.</p>
TVM	Screen Display Example
ORCA and ticket vending machine (TVM)	<p>Action: Place card in card reader Action: Touch screen on button –"Show ORCA Card Details" TVM Message: E-purse value or pass is listed on card detail screen</p>

APPENDIX B – .XML AND .CSV FILE STRUCTURE

Click the “attachments”  icon to view samples of basic .XML and .CSV file structures for common actions on the business account website. Much of the coding is unique to your business account. These are just samples for format purposes. You will need an .XML or .CSV editor to make changes to these files.

Please contact your company’s Information Technology department if you need assistance.

A business account can export data by doing the following:

- Click on any order on the **Orders** page and then click **Export Order** at the bottom of the order page.
- Click **Export group** at the bottom of the **Groups** page.

Note: If the business account orders products that were not part of the original exported order (either .CSV or .XML file), a new file must be exported in order to identify the unique product code for the new product, e.g. a \$5.75 PugetPass. That unique identifier can then be included in future imported files. This is necessary because each product code is unique to each business account.

.XML File Format – Product Order:



XML File Format
Product Order.docx

.CSV File Format – Product Order:



CSV File Format
Product Order.xlsx

APPENDIX C – E-VOUCHERS

E-vouchers are available to business accounts with a pre-existing E-voucher Program. They are purchased for their business account cards on a month-to-month basis in variable amounts, up to a maximum of \$300, then “redeemed” by the cardholder to purchase a monthly pass or load to their E-purse.

E-voucher values are determined in advance and set up by the lead agency. The business account decides how they want cardholders to redeem vouchers, remotely (**remote** revalue), automatically (**automatic** revalue) or a combination of the two (**both**).

1. The **remote** setting means that the cardholder must take an action to spend the voucher. The cardholder must register his/her card on www.orcacard.com. Products must be purchased either online through a personal My ORCA login at orcacard.com or at an agency customer service center (not at an ORCA retail location). Remote vouchers expire 31 days from the date the voucher product order is approved.
2. The **automatic** setting means that the voucher value will automatically download to the cardholder’s E-purse when the card is tapped at an ORCA card reader. The cardholder can use the E-purse value to pay for individual trips or to purchase a monthly pass. The cardholder cannot change this setting. Automatic vouchers expire 60 days from the date the voucher product order is approved.

When using E-purse to purchase a product, the cardholder must do so in a “card present” environment (e.g., at a transit agency customer service center, ORCA retail location, or ticket vending machine). The cardholder cannot use E-purse value to make a purchase online or by phone.

3. The **both** setting means that the voucher value will automatically download into the cardholder’s E-purse when the card is tapped at an ORCA card reader, unless the cardholder chooses to update the revalue setting to “remote” on their personal ORCA account. If the cardholder changes the setting to remote, remote rules (see above) will apply.

The setting defaults to **automatic** for the first month on each card set up with a **both** setting to receive an e-voucher. Following that first month, the cardholder can change the setting to **remote** if they choose to do so.

CHANGE E-VOUCHER SETTINGS

Once you change the e-voucher setting to **automatic**, you, or the cardholder, cannot change it back to **remote**. It can only be changed back to **remote** by your lead agency. However, a business account representative may change its e-voucher program from **remote** to **automatic** for an individual card or for a group of cards, if the lead agency established it as a remote setting. The steps to make this change are described below.

1. Select the card or group that you want to change to **automatic** using any of the search criteria available.
 - a. Branch and group criteria
 - b. A specific card serial number
 - c. Card status (e.g. active or blocked)
 - d. Type of product on the card.

2. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.
3. Click the **serial number** of the card that you want to change to automatic revalue. Card Account Details – for card “xxxxxxx” will appear.
4. Click **Change to Automatic**.

You will be redirected to the “Card Account Details” screen, which will indicate that the voucher revalue type has been successfully changed.

As previously noted, once you change the e-voucher setting to **automatic**, you, or the cardholder, cannot change it back to **remote**.

USE OF E-VOUCHERS BY EMPLOYEES

For business accounts with an e-voucher setting of **both** or **automatic**, the e-voucher value will automatically transfer to their cards’ E-purse when cardholders tap their cards on an ORCA card reader, following the 24 to 48 hour waiting period.

NOTE: When using E-purse to purchase a product, the cardholder must do so in a card present environment (e.g., at an agency customer service center, a participating retailer location or a ticket vending machine). **The cardholder cannot use E-purse value to make a purchase online or by phone.**

The following cardholder directions will help your employees successfully change their e-voucher setting from automatic to remote.

1. Wait until after the first e-voucher has been redeemed (the first e-voucher on any individual card under a **both** or an **automatic** setting will always be **automatic and download to an E-purse**).
2. Log in to ORCA at orcacard.com.
3. Register your card if you have not already done so.
4. Log in to your My ORCA login.
5. Click Update Autoload Type (if the business account set the e-voucher as automatic).
6. Change the Autoload setting to Remote.
7. Wait 24 to 48 hours for the system to recognize the change.

The following cardholder directions will help your employees successfully use a remote e-voucher to purchase a product. The cardholder can redeem a remote e-voucher via a My ORCA login at orcacard.com or in person at an agency customer service center using these instructions.

1. Log in to your My ORCA login at orcacard.com.
2. Register your card if you have not already done so.
3. Click Have a Card.

4. Log into your My ORCA login.
5. Select Add Value from the left navigation bar. Do not use any other Add Value link.
6. Select the type of product you'd like to add to your card.
7. Choose a pass product.
8. Choose the month.
9. If there are more passes needed choose 'Continue Shopping' and repeat steps 5, 6 and 7.
10. Click Pay now.
11. If you have a valid e-voucher, the next screen will show Pay by Electronic Voucher.
12. Choose the radial button that lists your company's name and click Continue.
13. Complete the payment information. If needed, use a Visa or MasterCard debit/credit card for remaining balance.
14. Click Submit payment.
15. Your receipt will appear, click Print receipt and keep for your records.
16. It will take up to 48 hours for your PugetPass, Washington State Ferries pass or E-purse purchase to be validated. Make sure to purchase the product at least two days prior to date of use.

The following rules apply to cardholder changes to e-voucher settings:

Agreement Revalue Type	Order Revalue Type	Card Revalue Type	Cardholder Actions
Remote	Remote	Remote	Cannot change
Automatic	Automatic	Automatic	Cannot change
Both	Automatic	Automatic	Can update to remote