ORCA Google Pay Business Account User Guide

This user guide will help you get familiar with how to manage digital ORCA cards on your account. Below we show you how you can manage digital cards, filter by card types, and how to navigate the new reporting features. For more detailed information visit our FAQ.

Table of Contents:

myORCA.com Digital Cards on Manage Cards Page

Filtering Card Types

Bulk Actions and Reporting

How to view ORCA cards that have been added to Google Wallet on your myORCA.com Business Account

Helpful tips for getting started:

- When your organization opts-in to providing the ORCA on Google Pay feature to your card holders, you will see new information about the cards that have been added to Google Wallet to help you manage your account.
- When a card holder converts a plastic card to a digital card in Google Wallet, their plastic card will be replaced by a new digital card in Google Wallet with a new card number. Once converted to a digital card, the plastic card will no longer work and cannot be reissued. These cards can be cut up and disposed of in the trash.
- If your organization has not opted-in, you may still see the new columns and features for managing digital cards described below.
- 1. Log into your myORCA.com business account
- 2. On the Manage cards page, you will see two new columns on the screen, Card type and Replaced Card.
- 3. The card type column indicates whether the card in the list is a Physical card or a Digital card in Google Wallet, (listed as "In wallet").
- 4. The replaced card # column will show the old plastic card number that was replaced by the new digital card for your reference.

5. There will still be a line item for the old plastic card in the list. The entry will show the old card number, and its status will show that it was Replaced (by the cardholder with a new digital card in Google Wallet).

Helpful tip: We recommend retaining the line items for old plastic card numbers that have been converted to Google Wallet. They provide a reference in the myORCA system between the two card numbers. This can be helpful information for providing support to your card holders and can also help reduce errors on bulk actions.

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	9840001025000395836	4	Barbara Vance	Shipping	Active	Full access	Adult	In wallet	9830024051716351823
	9830024052015500660		Assign participant		Replaced	Full access	Adult	Physical card	
	9830024051716351823		Assign participant		Replaced	Full access	Adult	Physical card	
	9830024051716344593	8	Melvin Morley	Marketing	Active	Full access	Adult	Physical card	
	9830024051716340781	6	Kane Palmer	Sales	Active	Full access	Adult	Physical card	
	9830024051716334445	3	Ailsa Horner	Finance	Active	Full access	Adult	Physical card	
	9830024051716325015	2	Simrah Cresswell	Shipping	Active	Full access	Adult	Physical card	
	9830024051716320838	5	Lexi-Mai Choi	Finance	Active	Full access	Adult	Physical card	
	9830024051716314509	1	Darren Mathews	Human Resources	Active	Full access	Adult	Physical card	
14 F	Results Per page:	10 🔻							1 2

- I. Managing individual ORCA cards that have been added to Google Wallet
 - 1. On your Manage Cards page, check the box next to the card number you wish to manage
 - 2. Click Manage.
 - 3. The card management window will appear. In this window you will see that the card has been added to Google Wallet by the card holder. All other card management options and functionality are the same for digital cards as they are for plastic cards.

4. Note, if you open the manage window when selecting the old plastic card that was replaced, you will see a message indicating the card has been replaced with the new card number.

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Minimum of \$5.00 and maximum of \$400.00.		9830024051716340 781	6	Kane Palmer	Sales	Active	Full access	Adult	Physical card	
\$5 \$10 \$25 \$50		9830024051716334 445	3	Ailsa Horner	Finance	Active	Full access	Adult	Physical card	
\$ 0.00		9830024051716325 015	2	Simrah Cresswell	Shipping	Active	Full access	Adult	Physical card	
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		9840001025000395 836	4	Barbara Vance	Shipping	Active	Full access	Adult	In wallet	9830024051716 51823
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		9830024051716344 593	8	Melvin Morley	Marketing	Active	Full access	Adult	Physical card	
		9830024051716340 781	6	Kane Palmer	Sales	Active	Full access	Adult	Physical card	
		9830024051716334 445	3	Ailsa Horner	Finance	Active	Full access	Adult	Physical card	
		9830024051716325 015	2	Simrah Cresswell	Shipping	Active	Full access	Adult	Physical card	
		9830024051716320 838	5	Lexi-Mai Choi	Finance	Active	Full access	Adult	Physical card	
		9830024051716314		Darren	Human		Full		Physical	

Filtering the card list by Card type

- 1. To see a list of cards that have been added to Google Wallet by cardholders, select Card type from the first drop down list on the filter and search menu.
- 2. In the second drop down list, select In Wallet.
- 3. Click the magnifying glass to search.
- 4. The results will generate a list of cards that have been added to Google Wallet.
- 5. The "Card Type" column header itself can be sorted like an Excel header.

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	9830024051716340781	6	Kane Palmer	Sales	Active	Full access	Adult	Physical card	
	9830024051716334445	3	Ailsa Horner	Finance	Active	Full access	Adult	Physical card	
	9830024051716325015	2	Simrah Cresswell	Shipping	Active	Full access	Adult	Physical card	
	9830024051716320838	5	Lexi-Mai Choi	Finance	Active	Full access	Adult	Physical card	
	9830024051716314509	1	Darren Mathews	Human Resources	Active	Full access	Adult	Physical card	

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2 Results Per page: 1	0 -							

II. Searching for cards that have been added to Google Wallet with the old plastic card number.

Helpful tips for getting started:

- You can find the new card number for a card that has been added to Google Wallet using the old plastic card number from the card you issued to the cardholder.
- This is helpful when you only have the original plastic card number that you issued, and the card holder has converted it to a digital card in Google Wallet.
- If you have the new card number, simply use the Card number search in the "Filter and Search by" drop down for both plastic and in wallet cards.
- 1. In the manage card screen, select "Replaced card number" from the "Filter and Search by" by drop down menu.
- 2. Enter the plastic card number you want to search for in the search term field.
- 3. Click the magnifying glass to search.

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	9840001025000395836	Group	Barbara Vance	Shipping	Active	Full access	Adult	In wallet	983002405171635182
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	9830024051716351823	Card has	Assign participant		Replaced	Full access	Adult	Physical card	
	9830024051716344593	Replaced card number	felvin Morley	Marketing	Active	Full access	Adult	Physical card	
	9830024051716340781	6	Kane Palmer	Sales	Active	Full access	Adult	Physical card	
	9830024051716334445	3	Ailsa Horner	Finance	Active	Full access	Adult	Physical card	
	9830024051716325015	2	Simrah Cresswell	Shipping	Active	Full access	Adult	Physical card	
	9830024051716320838	5	Lexi-Mai Choi	Finance	Active	Full access	Adult	Physical card	
	9830024051716314509	1	Darren Mathews	Human Resources	Active	Full access	Adult	Physical card	

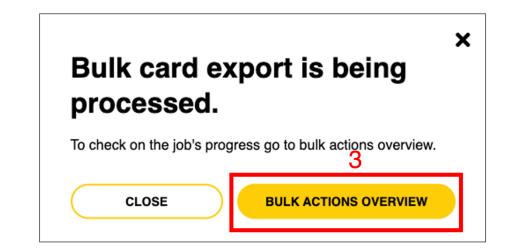
4. The results will show the card account with both the new card number shown in the Card # column and the old card number shown in the Replaced card # column.

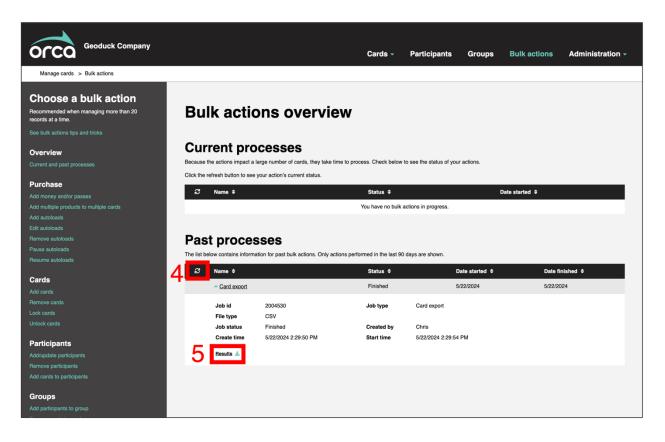
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	9840001025000939898	11	Gary Walker	Finance	Active	Full access	Adult	In wallet	9830024052015500660
	1 Results Per page: 10								

Using bulk actions to download reports with new digital card numbers and conversion date and time.

- 1. In the Manage card page, from the BULK EXPORT drop down choose "All" to download all cards (or, if you use groups, you can choose a group name to download).
- 2. Click the download button to run the report.
- A pop-up will appear to confirm the bulk card export is processing. Click "Bulk actions overview" button to go to the Bulk actions page.
- 4. If your job is present in the "Current processes" section, select the cycle button to refresh its status.
- 5. Once the job has moved to the Past processes section, find your Bulk process and click the light blue arrow next to the job name.
- 6. Within the dropdown menu, click Results to download your report in .csv format.
- 7. When you open the file, you will see three columns that provide information about cards that have been converted: ReplacedCardPrintedNumber which is the old plastic card number, PrintedNumber, and ReplacementDate

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	9840001025000395836	4	Barbara Vance	Shipping	Active	Full access	Adult	In wallet	983002405171635182
	9830024052015500660		Assign participant		Replaced	Full access	Adult	Physical card	
	9830024051716351823		Assign participant		Replaced	Full access	Adult	Physical card	
	9830024051716344593	8	Melvin Morley	Marketing	Active	Full access	Adult	Physical card	
	9830024051716340781	6	Kane Palmer	Sales	Active	Full access	Adult	Physical card	
	9830024051716334445	3	Ailsa Horner	Finance	Active	Full access	Adult	Physical card	
	9830024051716325015	2	Simrah Cresswell	Shipping	Active	Full access	Adult	Physical card	
	9830024051716320838	5	Lexi-Mai Choi	Finance	Active	Full access	Adult	Physical card	
	9830024051716314509	1	Darren Mathews	Human Resources	Active	Full access	Adult	Physical card	





III. Using bulk action files with physical card numbers that have been replaced by a new digital card number in Google Wallet. The bulk action below are to Add money and/or passes.

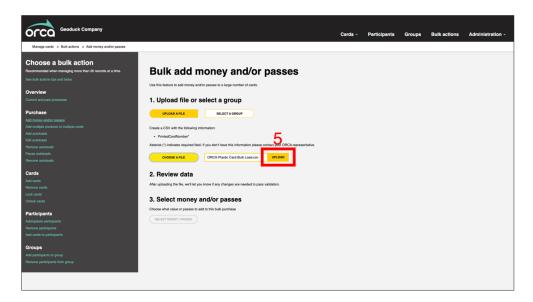
- 1. Click on the Bulk actions button on the top navigation. Choose the appropriate job.
- 2. Be sure that "Upload a file" is selected
- 3. Click "Choose a file"
- 4. Select the file to upload from your computer
- 5. Click upload
- 6. You will receive a confirmation that your file was uploaded successfully. If you encounter any issues, make sure to visit <u>Bulk actions tips and tricks | ORCA (myorca.com)</u>
- 7. Click the relevant button in the "Submit the bulk action" step.
- 8. If applicable, click Checkout
- 9. *If* applicable, in the shopping cart, select your payment method and click Place order
- 10. Return to the Bulk actions screen and click refresh on the Current processes bar
- 11. When your process is finished, it will appear in the past processes window.
- 12. Download and open the results file.
- 13. In the error message column, you will see a message indicating that the order has been processed on two cards that have been converted to digital (rows 4 and 12 in this example). The message will include the old card number, the new digital card number and the date and time of replacement.

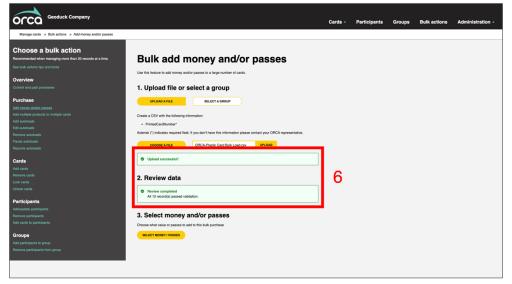
NOTE: although this field is called error message, the order has been processed successfully.

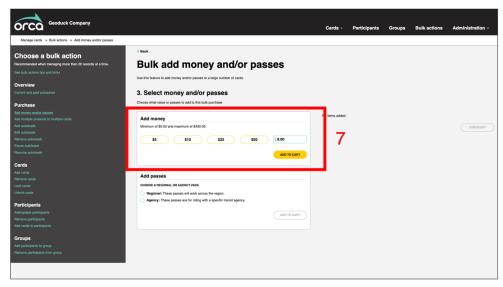
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	- Card export	Finished	5/22/2024		5/22/2024	
Participants Addupdate participants Remove participants Add cards to participants						
Groups Add participants to group Remove participants from group						

Geoduck Company		Cards -	Participants	Groups	Bulk actions	Administration -
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Add: monte: and/cc assess Add multiple products to multiple cards Add autobads Edit aucobads Bennore autobads Passe autobads Resume autobads	Create a CSU of the following information: • Pinter Vinter Asteria (*) indicates required field. If you don't have this information please contact your ORCA representative. CHOOSE AFILE No file selected UPLOAD					
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Participants Add/updale participants Remove participants Add cards to participants	Choose what value or passes to add to this bulk purchase SELECT NONEY/PASSES					
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Add cards Bernove cards	 Add money and/o 	<u>Dasses</u>		Failed		5/22/2024			
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Remove cards	Job id 2004676	Job type	Add money and/or pa	ises			
Lock cards	Job status Finished	Created by	Chris McKnight				
Unlock cards	Create time 5/31/2024 3:27:30 PM	Start time	5/31/2024 3:27:33 PM				
Participants	Data file . Results ± 12						_

	ORCA-bulkjob2004676-resultsFile								
	PrintedNumber	LineNumber	RecordStatus	ErrorMessage					
	'9830024051716334445	2	Success	13					
	'9830024051716320838	3	Success	10					
	'9830024052015500660	4	Success	Processed card 9830024052015500660 replaced by card 9840001025000939898					
	'9830024051716344593	5	Success						
	'9830024051716301300	6	Success						
'	'9830024051716340781	7	Success	-					
3	'9830022012512181403	8	Success						
)	'9830024051716311810	9	Success						
0	'9830024051716314509	10	Success						
1	'9830024051716325015	11	Success						
2	'9830024051716351823	12	Success	Processed card 9830024051716351823 replaced by card 9840001025000395836					
3	'9830024051716290110	13	Success						