

## Quick Guide. Order System ODS.

### LOGIN

You will receive the user name and password for Swiss Bankers ODS from the Superuser in your company. The contact information is found in ODS either under «Contact» at the top right of the page or via the link «Forgot Your Password? Please click here».

This password is valid for 100 days. Thereafter, for safety reasons, a new password has to be set. You will automatically be prompted to change your password on login 20 days before its expiry.

If you have forgotten your password or if a problem arises during the ODS login process, you will find the contact data of the department in your company that will assist you via the «Contact» or the «Forgot Your Password» link.

### CUSTOMER IDENTIFICATION

**> ORDERING** You are here > Ordering

**> MANAGE & VIEW** Standard order

**> COUNTRY INFORMATION** Customer identification > Product selection > Delivery instructions > Verification & confirmation

Search for customer  
 Register customer

Card number

Name

First name

Data of customers who have already bought Swiss Bankers products are stored in the Customer Identification. The search strictly applies the entered search criteria. For example, a search for «Exam» will not yield the result «Example». For a fuzzy search, use the asterisk symbol «\*» as a wildcard. Thus, a search for «Exam\*» will yield the result «Example». We recommend searching for exact terms to ensure shortest response times.

### QUICK ENTRY OF CARD LOAD FOR EXISTING CUSTOMER

**> ORDERING** You are here > Ordering

**> MANAGE & VIEW** Quick entry of card load for existing customer

**> COUNTRY INFORMATION** Card load > Verification & confirmation

Card number

Load amount

in card currency or

in billing currency  CHF ▾

The quick entry mask allows card loads in only two steps.

Step 1: Entry of card number and load amount. Step 2: Verification and confirmation.

If you enter the load amount in card currency, the billing currency of the order is always automatically set to CHF.

### STARNDARD ORDER OF CARD LOAD FOR EXISTING CUSTOMER

**> ORDERING** You are here > Ordering

**> MANAGE & VIEW** Customer identification > Product choice > Delivery instructions > Verification & confirmation

**> COUNTRY INFORMATION** Beneficial owner

Exempel, Sandra Settlement currency  ▾

Kramgasse 4, 3506 Grosshöchstetten, Switzerland

Reload card

Card	Number	Cardholder	Balance	Amount in foreign currency	Exchange rate	Amount in CHF
Prepaid Card CHF	5307 7212 3456 7890	Exempel San...	900.00	1'000.00	1.0000	1'000.00

Enter the desired load amount for the card.

The checkmark icon above the balance indicates that the current online balance is being displayed. If the refresh icon is displayed, the balance is being updated. If you see the attention icon , move your mouse over it to receive the corresponding error message.

## LOAD CARD FOR NEW CUSTOMER – STEP BY STEP

**1.** Enter user name and password and click the arrow icon.

**2.** Click «Ordering».

**3.** Click «Register Customer».

**4.** Fill in mandatory fields, «Save».

**5.** Check card currency, enter load amount, «Next».

**6.** Check delivery address and type of delivery, «Next».

**7.** Check data, «Submit Order».

**8.** Print sales receipt for customer and copy for sales agency.

### > NOTE

You can still edit or cancel an order in the order system for about 10 minutes after having submitted it in ODS (MANAGE & VIEW, Orders). After this period, it will be processed by Swiss Bankers.

### > CONTACT

Questions regarding the order system: +41 31 710 12 21, systems@swissbankers.ch