



# Process

# Documentation

*Department:*

Customer Support

*Last Updated:*

9/19/2025 5:31 AM

***NAME OF PROCESS***

## Adding a Card on File to a Customer Account

***Use Case / Objectives***

This guide will walk you through viewing and adding a credit card to a customer's account. This applies when using Curbstone credit card system.

***Configuration, Training, and Reporting***

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

**Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.**

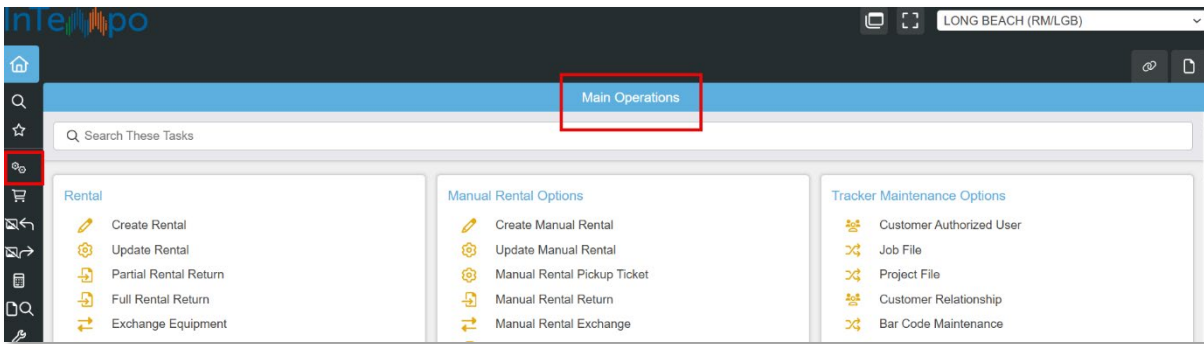
Menu options to access:

Main Operations => Cash Control Operations => Cards on File Maintenance

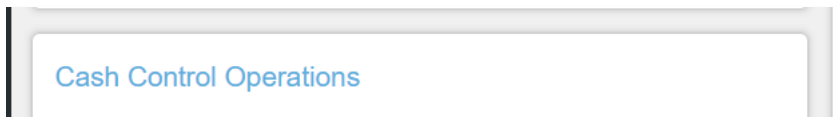
# Adding a Card on File to a Customer Account

## Process Steps

1. Log into the [RolePlay environment](#) using your credentials.
2. Click on the **Main Operations** menu option.



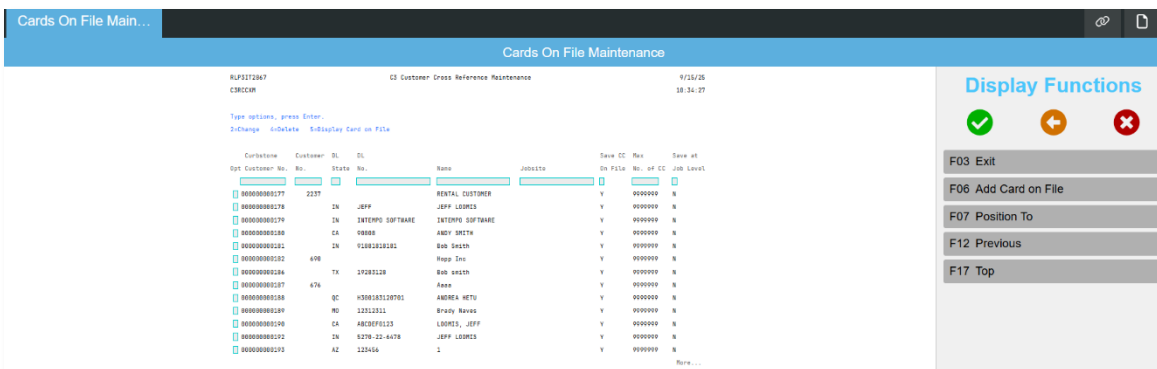
3. Scroll to the **Cash Control Operations** section.



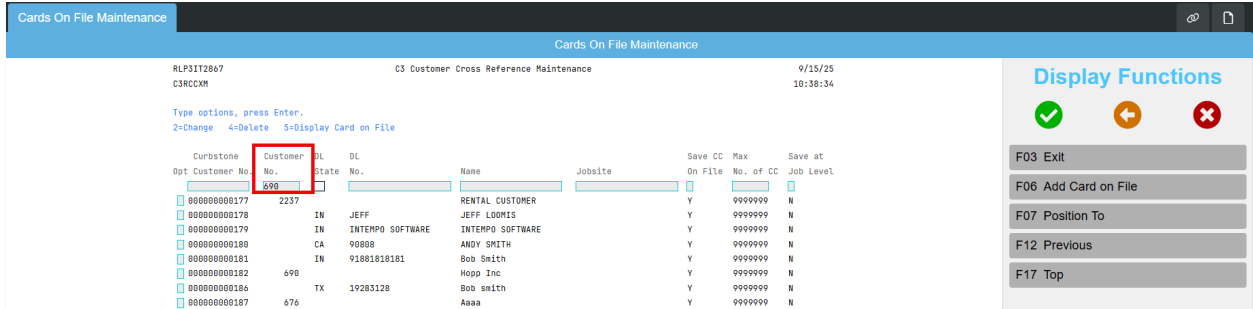
4. Select the option **Cards On File Maintenance**.



5. The **Cards on File Maintenance - CS Customer Cross Reference Maintenance** screen will open.

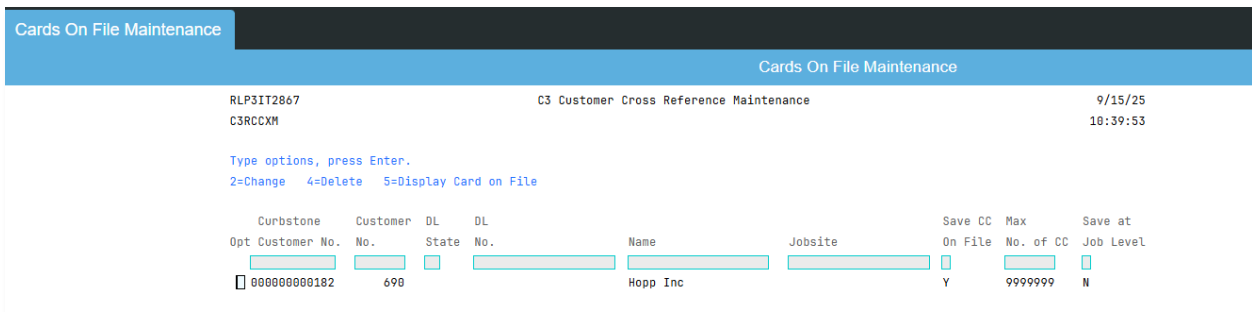


- a. You can filter the list by all of the columns by typing in the filter fields above them. The most commonly used ones are *Customer No.*, *DL State*, *DL No.*, and *Name*. **NOTE:** In this example *Customer No* was used.

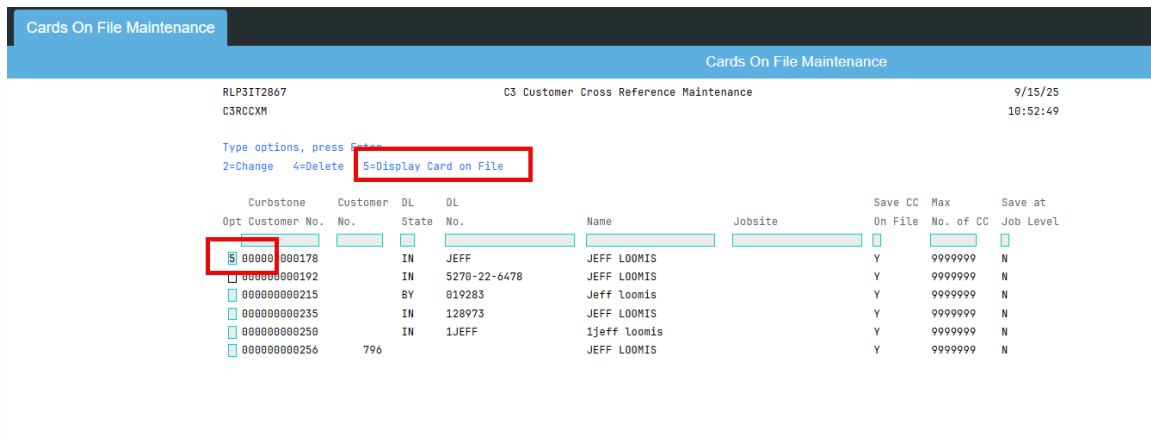


6. Press Enter.

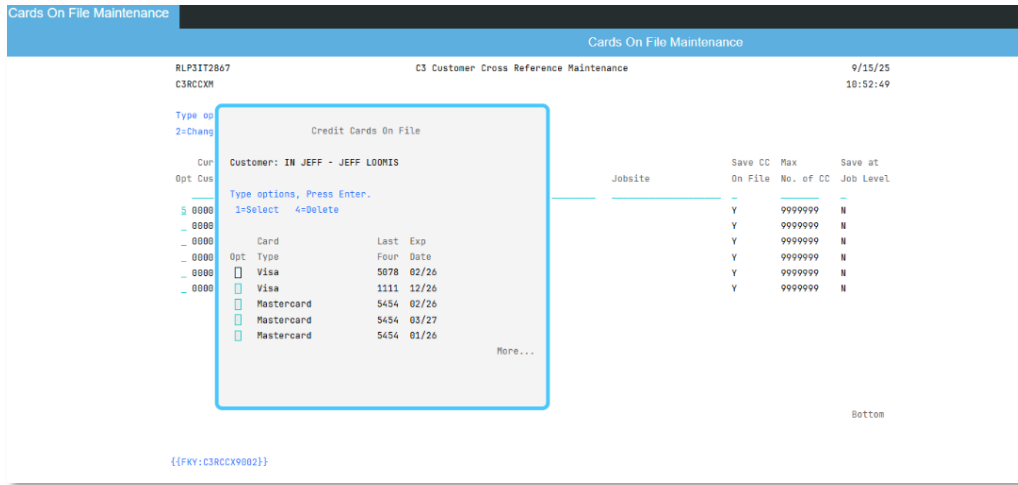
- a. The CS Customer Cross Reference Maintenance screen refreshes to display customers meeting the criteria entered.



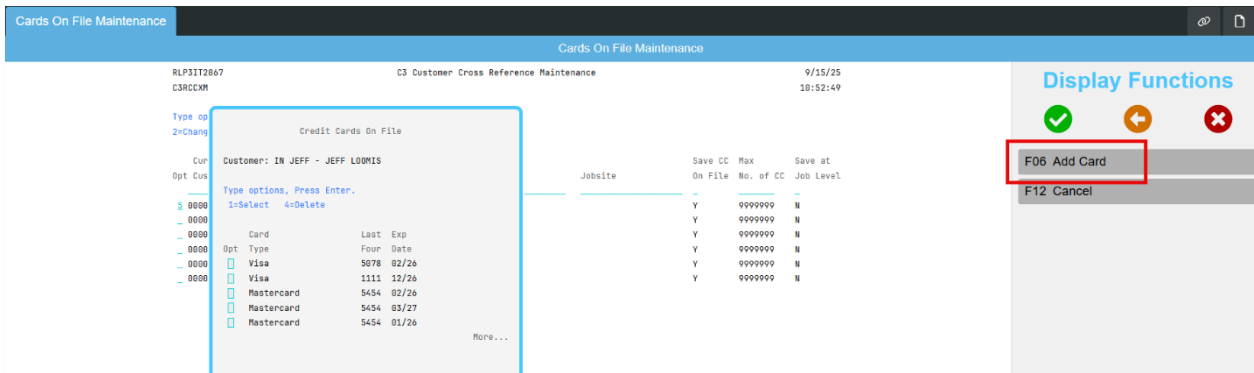
- 7. When you find the entry you are looking for type 5 in the *Opt* column next to it to see what, if any, cards are on file.



8. Press Enter.
  - a. The **Credit Cards on File** pop-up window opens for the selected customer.



- b. It shows all the cards that have been entered for this customer.
  - c. If you do not see the card desired you will need to add it.
9. To add a card press F6 on your keyboard or click on F06 Add Card in the **Display Functions** menu.



10. The Terminal Selection pop-up will display, and you want to find the one that is PLP.

Terminal Selection

Location: DMO - IRVINE

Type options, press ENTER.  
1=Select

Opt	Type	Id	Description	IP Address	Port	Lane
<input type="checkbox"/>	IPT	00000001	IPT-TERMINAL			1
<input type="checkbox"/>	EMV	00000006	DEJAVOO INDY	80852088,cLgXyAb		21
<input type="checkbox"/>	EMV	00000005	DeJavoo ISS OFFICE	80852013,cLgXyAb		4
<input checked="" type="checkbox"/>	PLP	00000008	PLP Terminal			5

11. Type 1 in the *Opt* column to select the PLP.

Terminal Selection

Location: DMO - IRVINE

Type options, press ENTER.  
1=Select

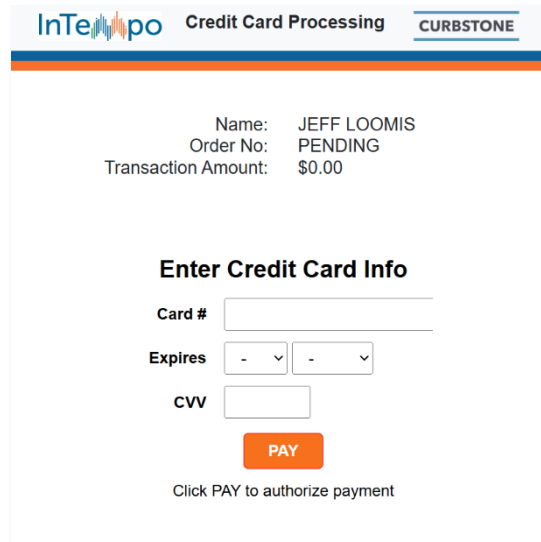
Opt	Type	Id	Description	IP Address	Port	Lane
<input type="checkbox"/>	IPT	00000001	IPT-TERMINAL			1
<input type="checkbox"/>	EMV	00000006	DEJAVOO INDY	80852088,cLgXyAb		21
<input type="checkbox"/>	EMV	00000005	DeJavoo ISS OFFICE	80852013,cLgXyAb		4
<input checked="" type="checkbox"/>	1	PLP	00000008	PLP Terminal		5

12. Press Enter to open the **Credit Card Entry - IPT** screen.

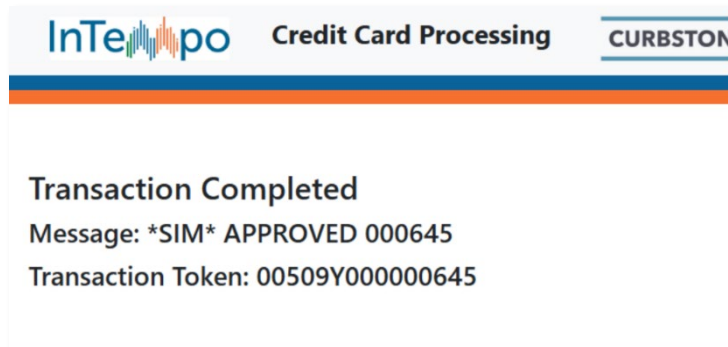


**NOTE:** There is not a place to enter in the new credit card number on this screen; therefore, you will need to press enter again.

- a. A website in a web browser opens the **Credit Card Processing** screen where the credit card information can be entered.



13. Type in the *credit card number*, *expiration date*, and *CVV* and click Pay.
  - a. The screen will refresh and display the message “Transaction Completed.”



14. You can close the website after you receive this message.
15. The credit card should be saved on file for future use.