



# Self Service User Guide

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## Perx Self-Service Ordering

- Perx offers physical, digital and virtual cards through our self-service user portal. Before an order can be placed, a company account needs to be created. It is critical your company registration number is accurately entered so that we can best serve you.
- Why is your company registration number important? We confirm your business information via Lexis Nexis.

## Important Information to know before placing an order

1. You cannot order more than one product at a time. If you need multiple card form factors (digital, physical or virtual) orders will need to be entered separately.
2. We offer cards in EUR and GBP. Make sure to select the product type and currency needed for your employees.
3. All cards must be registered to an intended recipient. Perx is no longer able to offer anonymous cards.
4. All orders require a spreadsheet upload with cardholder details.
5. The shipping address defaults to your business address for bulk order delivery.
6. Perx no longer accepts credit card payments. All payments to be paid via EFT.

## Creating an Online Account

There is no cost to create an online account. Once an account is created for your organisation, you'll be able to create orders, download invoices and view your order status.

1. Enter information into all required fields and select continue

1. Plan Selection > 2. Details > Payment > Confirm > Complete

### Setting Up Your Account

Create your account by entering your details or log in if you already have an account. [Existing User? Log In](#)

Email \*  
example@mail.com

First Name \*  
Example

Last Name \*  
User

Mobile \*  
Ireland (+353) 5555555

Date Of Birth \*  
dd Month Year

Enter a password so we can save your account into our system.

Password \*  
.....

Confirm password  
Confirm Password

Password strength: Very Strong

[Clear Info](#)

### Company Information

Enter your company details below to register your company.  Use as shipping address?

Please ensure that the Company Registration Number provided is correct. Failure to provide the correct value will limit the ability for your organisation to place orders

Company Name \*  
Example Company

Company Reg. No. \*  
123456

Company Type \*  
▼

Business Description \*  
\_\_\_\_\_

Address1 \*  
\_\_\_\_\_

Address2  
\_\_\_\_\_

Town \*  
\_\_\_\_\_

County \*  
Antrim ▼

Country \*  
Ireland ▼

Post Code \*  
\_\_\_\_\_

I agree to the [Terms & Conditions of use.](#)

## 2. Verify the information entered

**perx**

1 Plan Selection → 2 **Details** → 3 Payments → 4 Confirm → 5 Complete

### Confirm Your Subscription

Here's a break down of your plan going forward.

Account Details	
Name	Tracy Wicker
Email	Perx0912@mailinator.com
Date of Birth	12 Sep 1995
Mobile	United States of America (+1) 8166785866

Company Details	
Name	Perx0912
Company Reg. No	138974
Address	21612 w 100th Terr, Lenexa, Antrim, Ireland, 66220
Free	

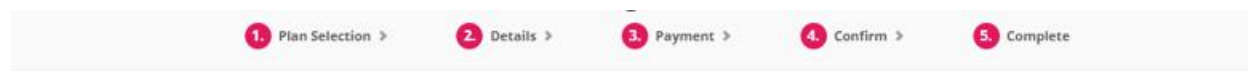
Perx Business

Total Cost: **Free**

Back Complete

## Verifying Online Account

Before you're allowed to place an order, we'll send you an email to verify your email address. The email will contain a link to confirm your email address and complete your account setup.

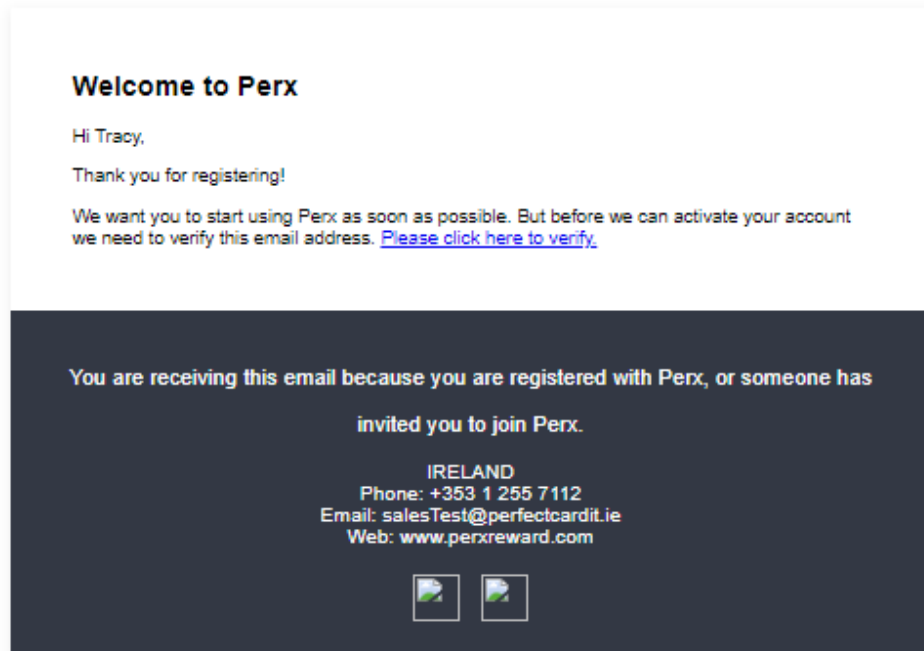


### Welcome Aboard

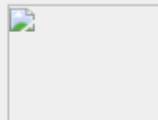
We've sent you an email to confirm your free account.  
Please check your inbox now and click on the link before logging in.



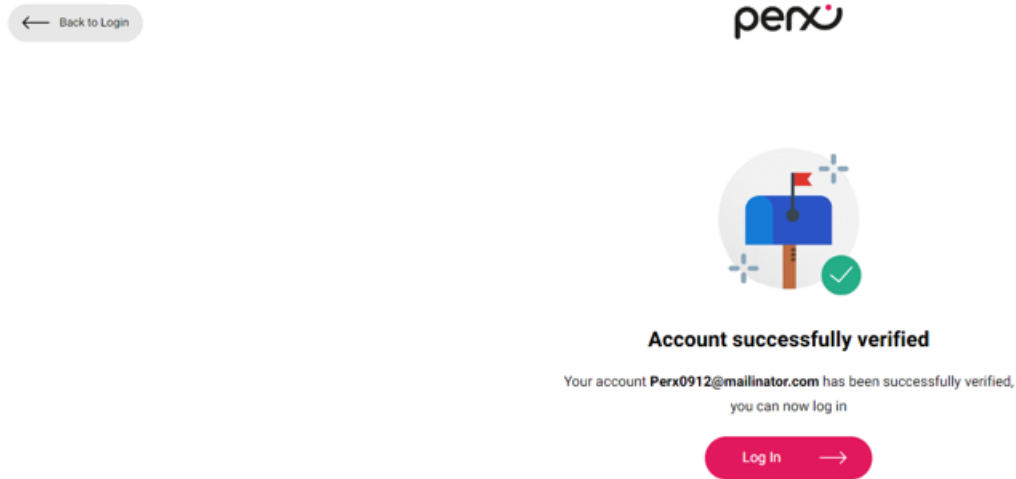
1. Click link included in verification email



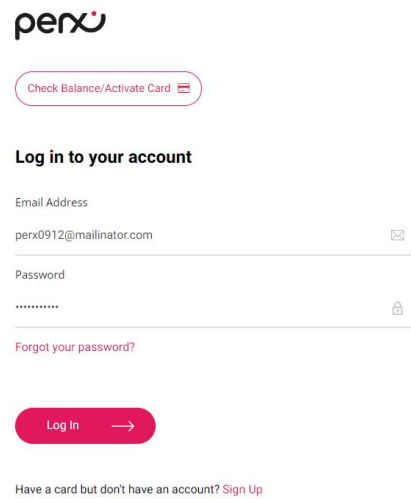
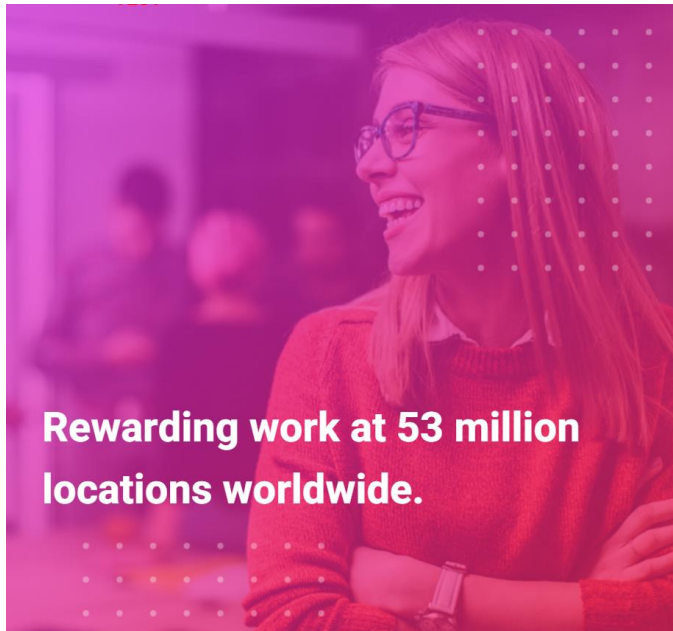
Powered By EML Connect



2. Click login after successful verification

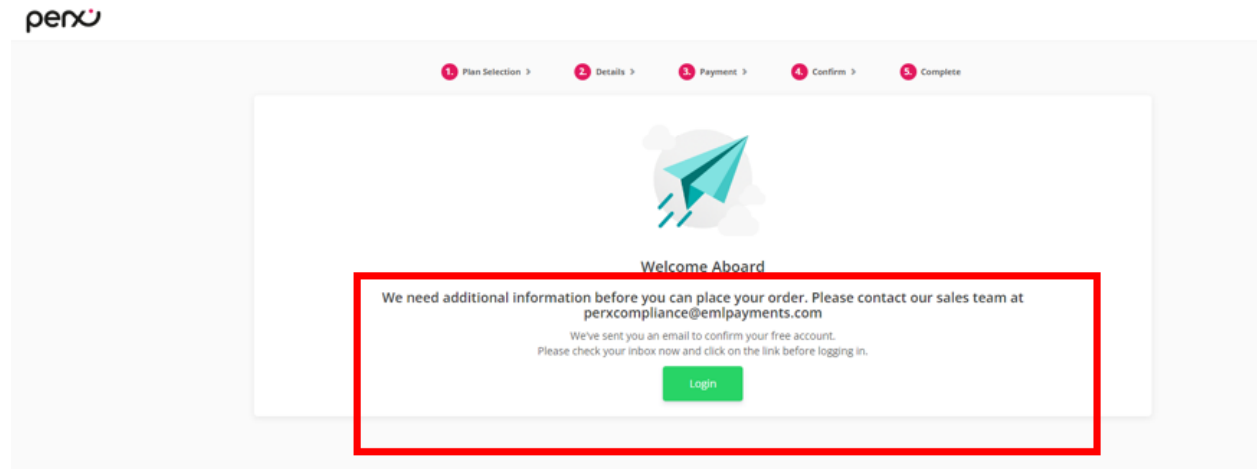


3. You're all set to place your order! Login using your email and the password set during account creation

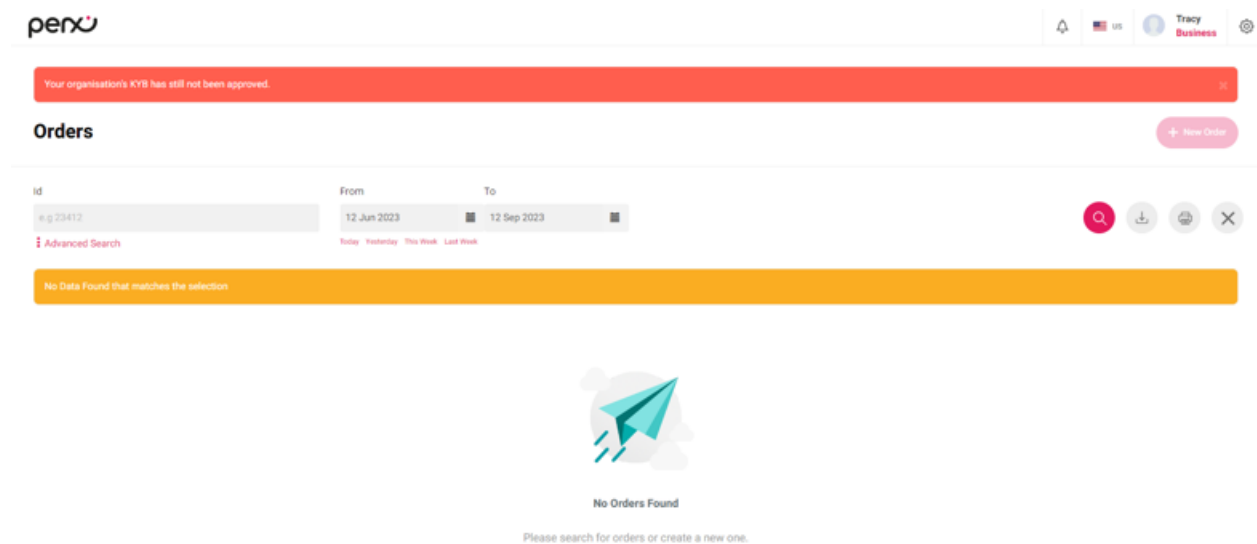


## Compliance message after completing account creation

Perx uses your company registration information to verify your business. If you've received the message displayed, we need to confirm your company details. It shouldn't take too long! Your account is created and you can still verify your email address. We'll be in touch to confirm your company information.

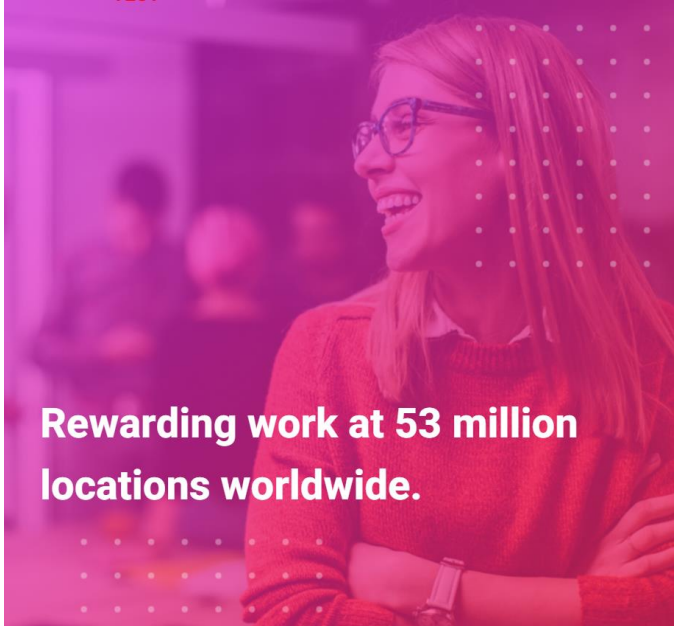


When you login to your account, you'll see this message.



## Placing an Order

1. Login to your account using your email address and password set during account creation



**perx**

Check Balance/Activate Card

**Log in to your account**

Email Address  
perx0912@mailinator.com

Password  
.....

Forgot your password?

Log In →

Have a card but don't have an account? Sign Up

2. Submit for two-factor authentication to ensure security of your account.

← Back to Login


**perx**

**This Is Not A Trusted Browser/Device**

To keep your account secure, we require you to enter a security code when logging in.

Send the Two-Factor Authentication Code to my

**How Two-Factor Authentication works**



**We are SCA live!**

In an effort to better protect consumers and reduce online fraud, regulations came into force on 31st Dec 2020 requiring Strong Customer Authentication (SCA).

**How does SCA work?**

SCA requires that authentication take place through at least 2 out of the following 3 factors:

- Knowledge – Something only you know (passcode or pin)
- Possession – Something only the user possesses (e.g. mobile phone or token)
- Inherence – Something you are (e.g. fingerprint, facial iris or eye vein)



### 3. Retrieve verification code sent via email

<b>To</b>	perx0912
<b>From</b>	prodsupport-eu@perfectcardit.ie
<b>Sending IP</b>	208.117.55.133
<b>Received</b>	2023-09-12 14:25:09

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HTML    JSON    RAW    LINKS    SMTP\_LOG    ATTACHMENTS

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Your security code is: 739112

### 4. Enter Verification Code



#### Enter Verification Code

You have been sent your two step verification code via email/mobile, enter below to access your account

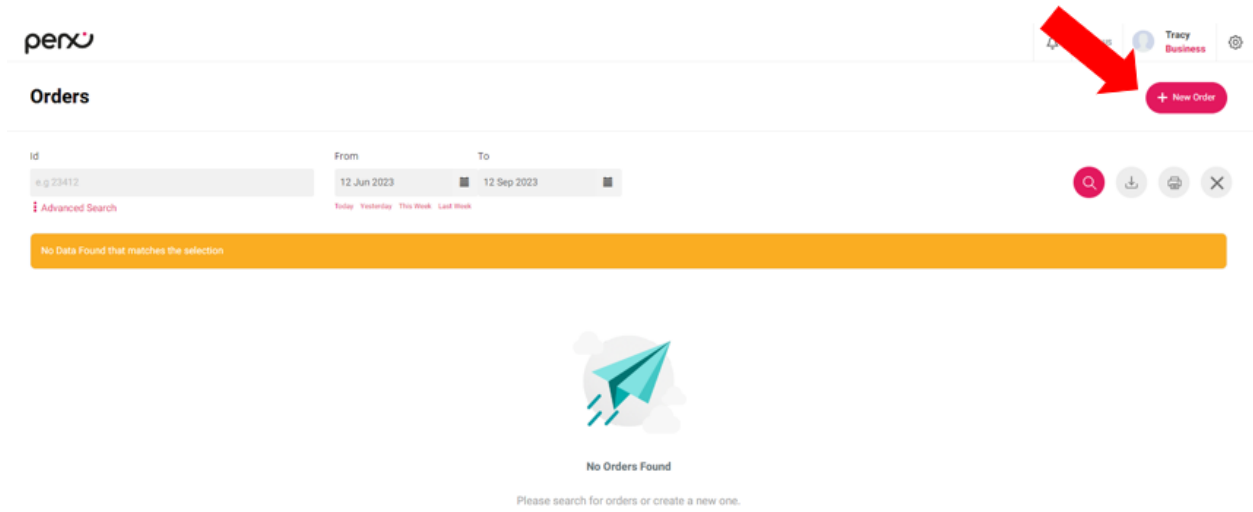
Enter 6-Digit Verification Code

Submit

If you trust this browser you can select the "Remember This Browser" checkbox after submitting your code, this will add it as a trusted device, next time you log in you will not need to verify your account.

Remember this browser? \*

5. Select "+New Order" button




The screenshot displays the 'perx' interface for the 'Orders' section. At the top right, the user profile 'Tracy Business' is visible. A red arrow points to a pink '+ New Order' button. Below the header, there are search filters for 'id' (with an example 'e.g. 23412'), 'From' (12 Jun 2023), and 'To' (12 Sep 2023). A message bar states 'No Data Found that matches the selection'. The main content area features a paper plane icon and the text 'No Orders Found' with the instruction 'Please search for orders or create a new one.'

6. Select Card Type
  - a. Card Type Options
    - i. Digital EUR – digital card compatible with mobile wallet for contactless payments. Issued in Euro
    - ii. Digital GBP – digital card compatible with mobile wallet for contactless payments. Issued in GBP
    - iii. Virtual EUR – virtual online only card. Issued in EUR
    - iv. Virtual GBP – virtual online only card. Issued in GBP
    - v. Physical EUR – physical card for use online and in-store purchases. Issued in EUR
    - vi. Physical GBP– physical card for use online and in-store purchases. Issued in GBP
7. Enter description or purchase order. Both fields are optional.
8. Select “Yes” for employee orders
9. Select “Upload Cardholder Details”

**Pending - New Order** ✕

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Organization

Card Type  

Billing Address

Shipping Address


Description

Purchase Order

For My Employees  Yes  No

---

**Order Details** Upload Cardholder Details

	CARD TYPE	QUANTITY	PRICE	LOAD VALUE	LOAD FEE	TOTAL	
	Perx Physical EUR	1	€0.00	-	€0.00	€0.00	✕

€0.00

---

CloseArrange Payment

## Spreadsheet upload

All Perx orders require a spreadsheet to identify the name of the intended card recipient. Perx is no longer able to offer anonymous cards.

**Pending - New Order** ✕

Organization

Card Type

Billing Address

Shipping Address


Description

Purchase Order

For My Employees  Yes  No

---

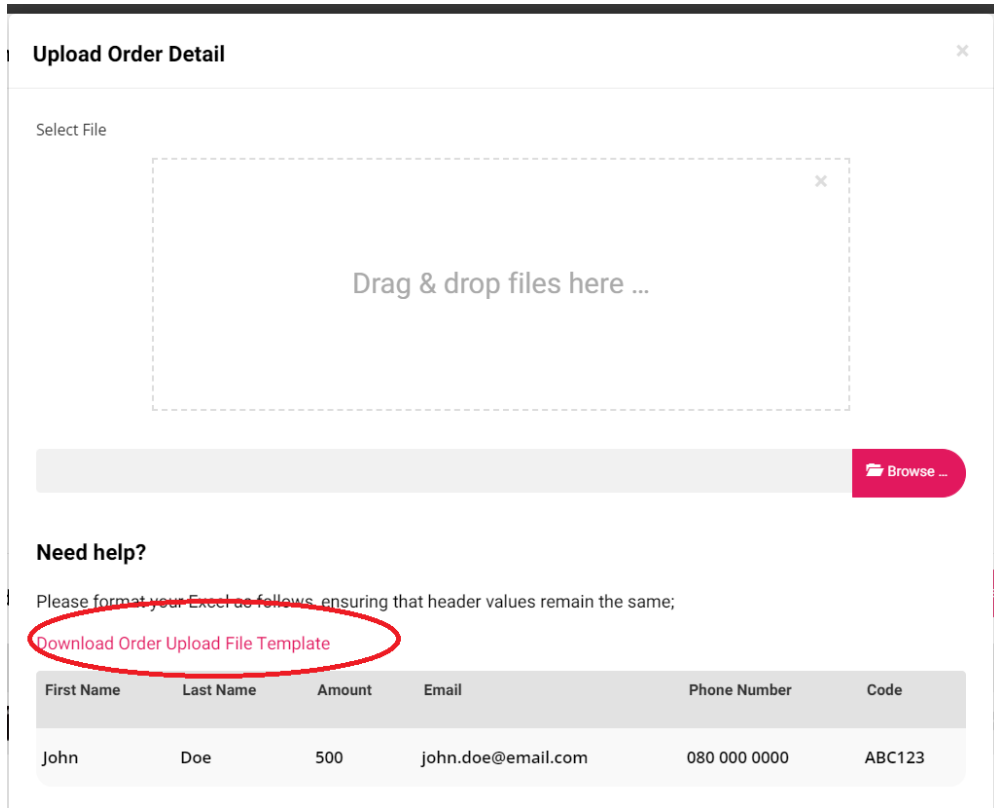
**Order Details** ➔ [Upload Cardholder Details](#)

CARD TYPE	QUANTITY	PRICE	LOAD VALUE	LOAD FEE	TOTAL
 Perx Physical EUR		€0.00	-	€0.00	€0.00 ✕

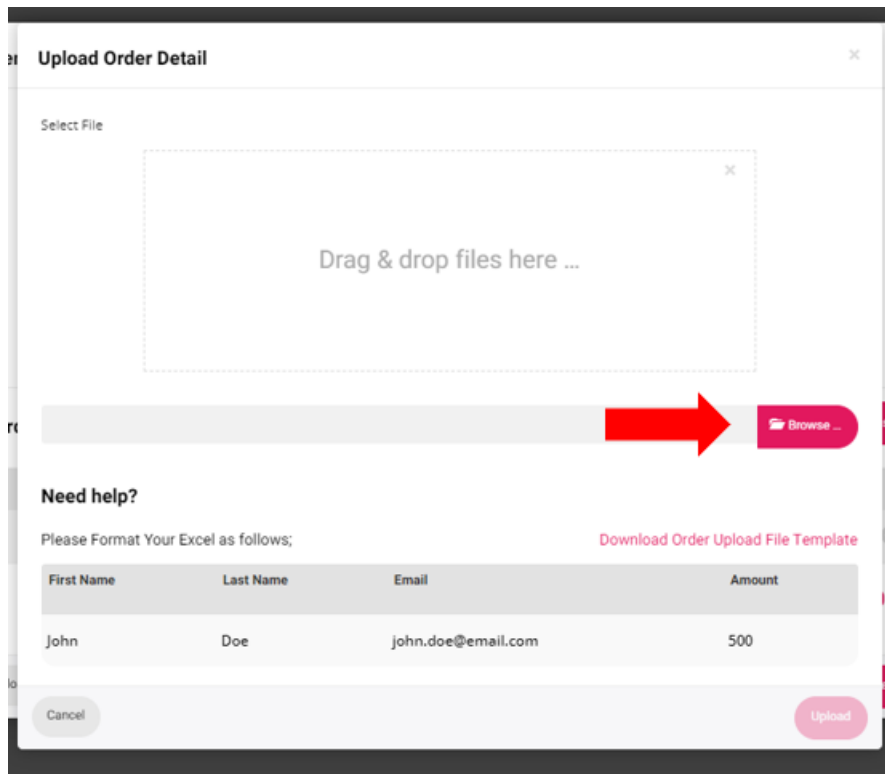
**€0.00**

[Close](#) [Arrange Payment](#)

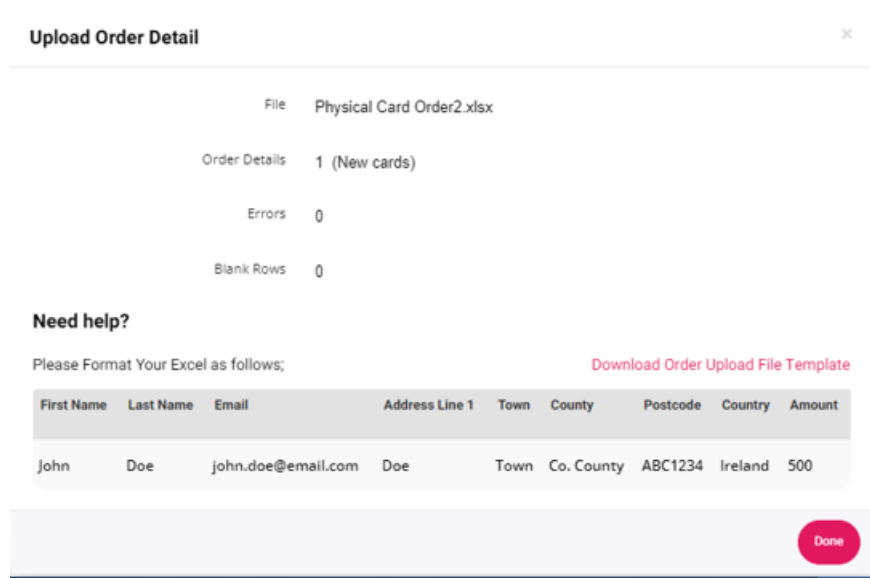
10. Download file template and save to computer to select for uploading.
  - a. Physical card input fields:
    - i. Cardholder First Name (required)
    - ii. Cardholder Last Name (required)
    - iii. Amount (required)
    - iv. At least one of the three following fields must be provided as this is the value the recipient will enter along with the Cardholder Last Name in order to verify and unlock their card. (Please note: you will need to ensure that you have a mechanism in place to communicate to your recipients that they will need this information to unlock their card, particularly if you utilize the Code field)
      1. Email
        - a. must be unique per cardholder in an order
      2. Phone Number
        - a. format = (0191) 1234567
      3. Code (this can be something like an employee ID or as simple as HOLIDAY23 or THANKS2023, etc.)
        - a. alpha numeric field
  - b. Digital/Virtual Card input fields:
    - i. First Name (required)
    - ii. Last Name (required)
    - iii. Email Address (required)
    - iv. Amount (required)
    - v. Personal Message (optional)



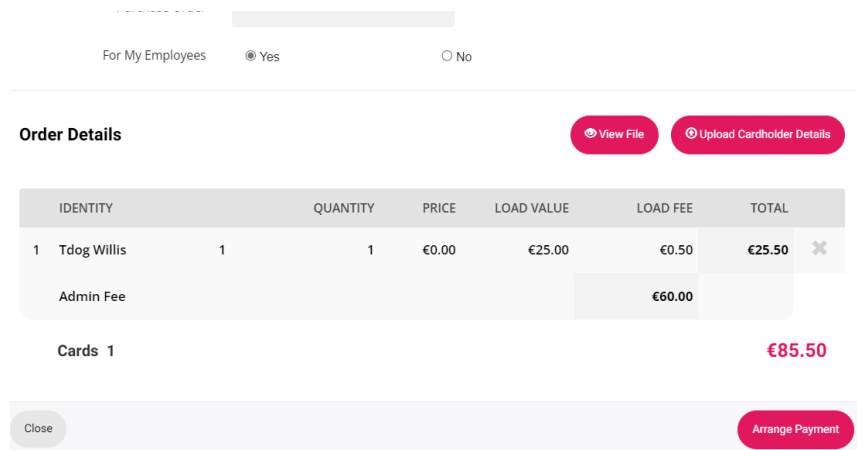
11. Select Browse to locate upload file



12. If spreadsheet is uploaded successfully, a success message with the number of records will appear.
- Select Done



13. Select arrange payment to complete order details and move to order confirmation.



### Confirming Order

14. An order confirmation screen will appear with details on the total payment due and will include details on the BIC and IBAN for payment delivery.
- Note, Perx no longer accepts payments via credit card. All payments required through EFT.

Pending Confirmation - Order 61274 Payment Details



Payment Type

An invoice will be raised for your order and emailed to you. Please arrange payment of the invoice. Your order will be processed when payment is received.

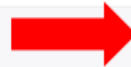
Payment Origin

Please lodge €205.00 to the following account:

BIC	SXPYDEHH
IBAN	DE8820220800090392692
Bank Name	Banking Circle
Bank Address	Chilehaus A Fischertwiete 2, Hamburg, Germany
Reference	Test-61274

Please make sure to reference your payment with the code Test-61274

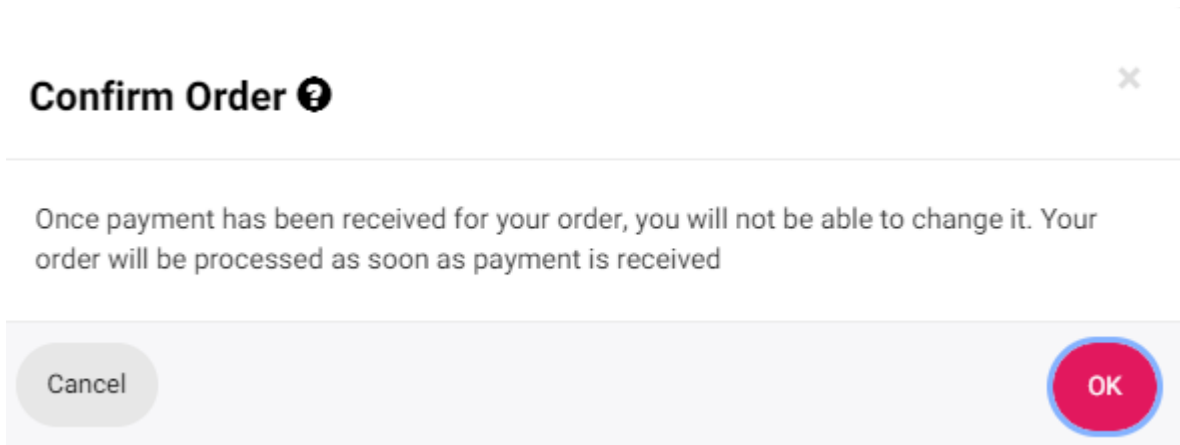
Close



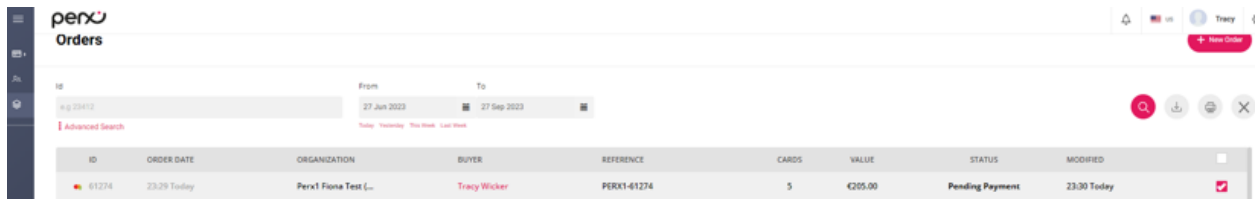
Confirm Order



15. Click "OK" to complete order.



16. When your order is complete. You will see your order and order status upon login to the portal.



## Invoice, Payment and Order Completion

17. An email is sent with an invoice and IBAN information for the order
- 



### **New Order Invoice: PERX1-61285**

**Thank you for your order.  
Your invoice is attached.**

#### **Dear Customer**

Thanks for placing an order with Perx. We have received your order and attached your invoice. Please take a moment to double check that all the information is correct.

#### **One more step...**

Your order will be processed as soon as payment is received. Details of how to pay are on the attached invoice. Upon receipt of payment, your order will be despatched in 5-7 working days for physical card orders and 1-2 working days for virtual and digital card orders.

To make payment, please refer to the attached invoice

Please make SEPA payment to the IBAN as per the attached invoice.  
We do not accept Urgent or same day transfers. Your transfer will arrive the next banking day.

**Thank you for choosing Perx.**

**Any questions?**

Talk to us online at [salesTest@perfectcardit.ie](mailto:salesTest@perfectcardit.ie) or call +353 (0)1 2557112

18. When payment is received, a notification is sent via email and the order is dispatched to fulfillment.
  - a. Physical cards are despatched within 5-7 working days
  - b. Digital or virtual cards are despatched within 1 working day



### **Thank you for your payment**

Hello Tracy Wicker,

Order number: PERX1-61285

Date Ordered: 9/28/2023

Your order is now being processed and your cards will be despatched within 5-7 working days for physical card orders and 1-2 working days for virtual and digital card orders.

Please be aware that for security reasons, we may contact you and request further information from you as part of the order process.

If you have any queries please contact us on +353 (0)1 2557111 or email our team at [prodsupport-eu@perfectcardit.ie](mailto:prodsupport-eu@perfectcardit.ie).

Thanks,  
Perxu

19. When the order has been fulfilled, a completion notification is sent via email.



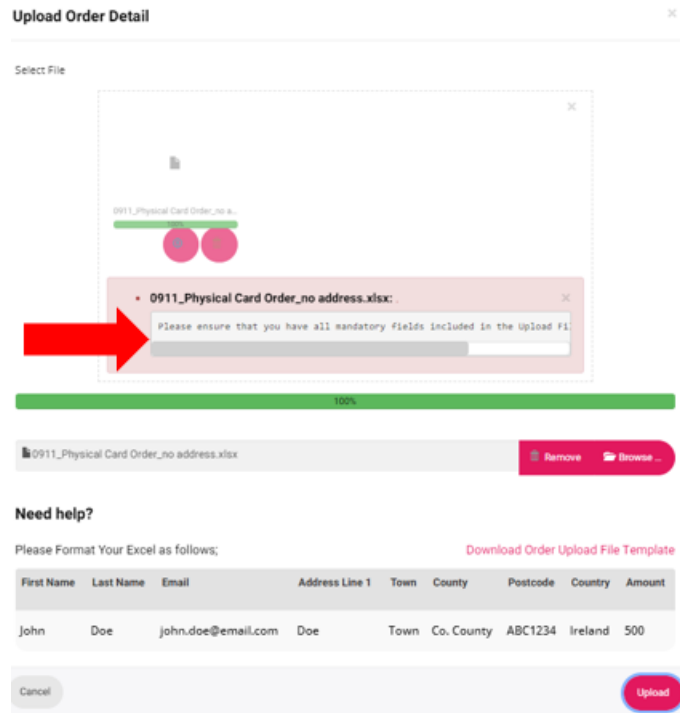
### **Order Complete**

Order number: PERX1-61287 has been processed and is ready for despatch.

You should receive your new cards within 2 business days

## Spreadsheet upload error

If the spreadsheet upload fails, an error will present with the reasons for failure. Please update errors and try again. When an upload is successful, a success message will appear.



## Add Users within your Organisation

1. Select the people icon from the left-hand menu.
2. Select Invite User
  - Users invited will have the same permissions that are available to the person that initiated the invite

