



CardValet® Frequently Asked Questions:

General Questions:

- Does CardValet work for ATM Cards?
 - No, CardValet only supports debit and credit cards
- Can I unsubscribe from CardValet?
 - Yes. There are multiple ways that you can unsubscribe from CardValet. You can unsubscribe through the CardValet application via Manage Portfolio. To unsubscribe, uncheck all cards and accounts and tap OK.
- How long does the app stay logged in if I do not log out?
 - The app will automatically log you out after 10 minutes of inactivity. Note, when done using the app you should click on the “log out”.
- Does CardValet reflect whether the card is turned on or off?
 - Yes, the card details section displays the card status by showing a red circle if it is turned off or a green circle if the card is turned on.
- What is included in Spent on cards this month?
 - Spent on card this month displays the total amount that is calculated from the cumulative spending on all managed cards in the month to date.
- When a card is lost, does the card new card number need to be registered manually through the app? And can I remove the old card?
 - Yes, the new card number must be registered. The replacement card is added to your profile by clicking on Menu>Manage Portfolio>Add Card. You cannot remove the old card but under the Manage Portfolio you can uncheck the card so it does not show up on the Home Page.
- Does CardValet work on all phones?
 - CardValet works with Apple and Android phones.
- Does the CardValet app show recent transaction history?
 - Yes, the app will show up to the last 50 card transactions posted within the last 30 days.

Registration Questions:

- What are the CardValet password requirements?
 - CardValet passwords must be between 8 and 12 characters long and include at least one (1) upper case letter, one (1) lower case letter, one (1) number and one (1) special character.
- Can I register multiple cards under one CardValet login?
 - Yes, you can link multiple debit and credit cards from the same financial institution under one login by clicking on Menu>Manage Portfolio>Add Card.

- If I have two different cards from different financial institutions that support CardValet, can I register both cards under one CardValet login?
 - No, you will need separate logins for each financial institution.
- When loading multiple cards under one CardValet login, do I need to enter all of the information for each card?
 - Yes, you will need to enter the same information for each card, this information includes the card number, address, zip code, card expiration date, and CVV/CVC code.
- If a parent registers a card for a child, what stops the child from changing the controls placed on the card?
 - The most recent person to register the card will have access to the controls and alerts on the card.
- You can download the card on multiple devices but are requested to indicate which device is “primary.” What is the purpose of assigning a primary device? Can you make changes to the settings from the non-primary device?
 - The primary device is used to track the GPS for the “My location” alerts and controls. All merchant and threshold alerts will be sent to the primary device. All devices that have registered a particular card can view or change the CardValet settings for that card. Controls (including the “On/Off” setting) are set at the card level, so the last update to a control will be honored regardless of which phone was used to make the change. Alerts are set at the device level, so each primary device will receive alerts that were set up from that particular device. The primary device can be re-set by accessing “Settings - Primary Device.”

Controls and Alerts

- A region has been set on the map. Does this mean the card can only be used exactly in this region?
 - The region shows the approximate area where the card can be used. CardValet can typically map the transaction down to a zip code or city. If the city or zip code of the merchant overlaps with the selected region in the map, then the transaction can still go through. There are instances where a merchant location cannot be mapped down to a zip code or city, in which case CardValet will default to a state-level match.
- What is the range of the “My Location?” controls and will this control setting impact internet transactions?
 - The “My Location” controls and alerts will check to ensure the merchant location is within a five (5) mile radius of the device within CardValet. These controls impact “Card Present” transactions only so internet transactions will not be impacted.
- What happens if My Location is set but the phone is left at home? Will transactions be denied outside the My Location area?
 - CardValet performs a proximity check at the granularity of zip code or city, so if the merchant is close to home then the transactions will still go through.

- Can I block international transactions?
 - Bank of Sun Prairie has international transactions blocked so if you are trying to make an international purchase you will need to contact Bank of Sun Prairie to unblock the foreign country you are planning to travel to or make a purchase from.
- Will the controls I previously set up within the CardValet app impact previously authorized recurring transactions?
 - No, recurring transactions will continue to process and will not be impacted even if your card is turned “off” within the CardValet app.
- How long does it take for a control or alert setting to take effect?
 - The control or alert setting will take effect as soon as you are done updating the information within the app.
- Can I turn off notifications during certain times of the day (for example while I’m asleep)?
 - You can set the “Do Not Disturb” time that will turn notifications off during the times selected by clicking Menu>Settings>Do Not Disturb and change the toggle switch so it shows that it is on and select the times you would like to not be notified.
- How are the alerts sent on your device?
 - The alerts are sent as push notifications to your phone. The alerts will also show up under “Messages” in the CardValet app.
- Can I set an alert to notify me when my balance drops below a certain dollar amount?
 - Yes, you can set the low balance alert by clicking on the account you’d like to set the alert for on the home screen, then click on Low Balance Alert and select the Low Balance Alert Threshold.
- Can I set spend limits on my card?
 - Yes, you can set dollar limits on a per transaction level, for example if I only want to be able to spend up to \$20 per transaction I can set that limit within CardValet. You do this by clicking on the card you’d like to control, then clicking spend limits, and turning on the per transaction switch and entering the amount you’d like to deny transactions at.
- Can I set merchant controls on my card?
 - Yes, you can set merchant types, such as gas, groceries, or retail stores by clicking on the card and then clicking merchant controls, then enabling the selected merchant categories you would like to allow on your card.