



CSI Go Application User Guide

Contents

- Overview** 1
- Requirements 1
- Getting Started** 1
- Download the Application 1
- Log In 2
- General Navigation 6
- Travelers** 7
- Trip Details 8
- My Trips** 13
- Weather** 14
- Quick Card** 14
- Unsecure Sending Method 16
- Secure Sending Method 17
- Cards** 18
- Create Virtual Card 19
- Requests** 20
- Approve or Deny Requests 21
- Menu** 22
- Profile Settings 23
- Appendix: FAQ** 24

Overview

The CSI Go mobile application allows CSI Travel users to see and manage trip details when paid using a single-purpose virtual card, get directions to and from locations, access hotel payment authorization details, and even book an Uber.

With this app, you get:

- clean, easy-to-use user interface
- enhanced trip management
- quick access to hotel payment details
- weather checker
- single-purpose virtual card creation capability

Whether you have booked a flight, car rental, or hotel reservation, this mobile app enables you to view important information about the corporate trips you take. This guide explains how to use the CSI Go app.

Note: Depending on your account configuration, you may not have access to some of the features described in this guide.

Requirements

The CSI Go app can be accessed on smartphones and tablets that use the following operating systems:

- iOS (version 8.0 or higher)
- Android (version 4.0 or higher)

Getting Started

Download the Application

To download the application, search for “CSI Go” in the iTunes Store or the Google Play Store. Once you have downloaded the app, it will appear on the screen of your mobile device.

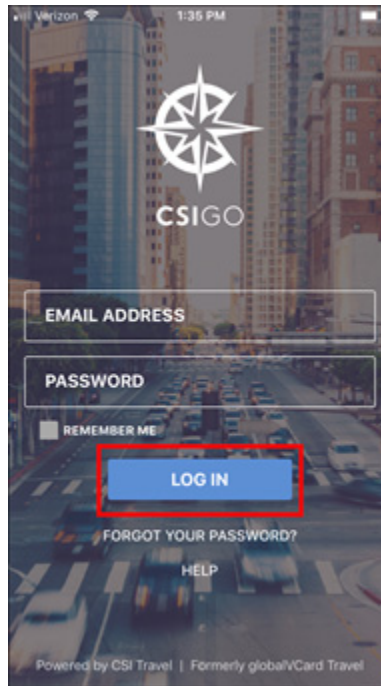


Note: For more information on downloading apps, go to the [iTunes Store FAQ](#) or the [Google Play FAQ](#).

Log In

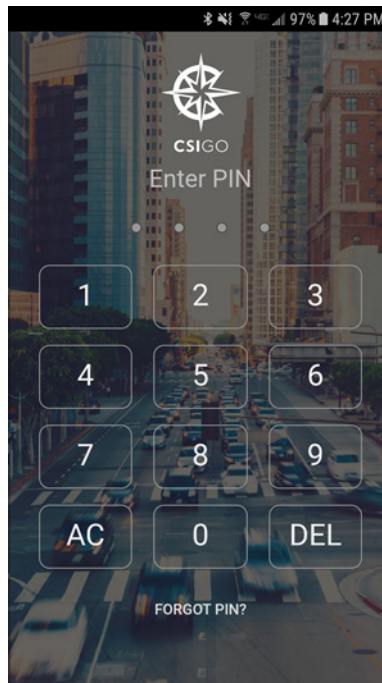
When your first trip is created, you will receive an email from noreply@csipaysystems.com with your username and a temporary password for the app. Follow these steps to log in:

1. Open the app and enter your **Email Address** and **Password**. Then, tap the **Log In** button.

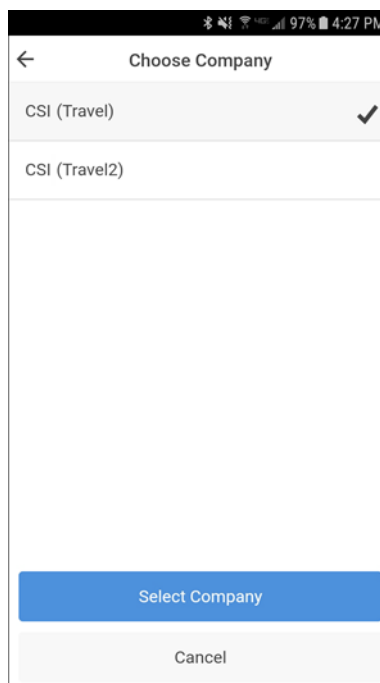


- If you have a CSI Paysystems account, you will use the email and password associated with that account.
- Tap the **Remember Me** checkbox to have the app remember your login credentials.
- If you forget your password, tap the **Forgot Your Password?** link on the **Log In** screen. On the screen that appears, enter your **Email Address** in the field and tap **Recover It**. You will receive an email with a new password.
- Tap the **Help** link to be directed to the CSI Go online help site in your mobile browser. From here, you can view troubleshooting tips and answers to frequently asked questions.

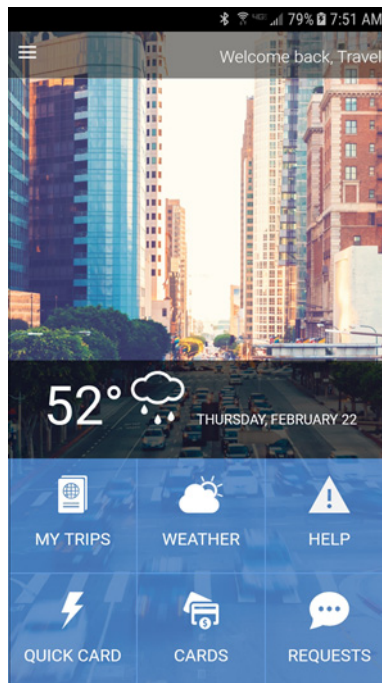
2. The **Enter PIN** screen opens.
 - a. If this is your first time logging into the app, you will be asked to **Enter a new PIN**. Enter a four-digit number that you will remember.
 - b. The **Confirm PIN** screen opens. Enter the four-digit PIN again. (Returning users will only have to enter the appropriate PIN once upon logging in to the app.)



3. If you have access to multiple accounts, the **Choose Company** screen opens. Select the appropriate option and tap **Select Company**.




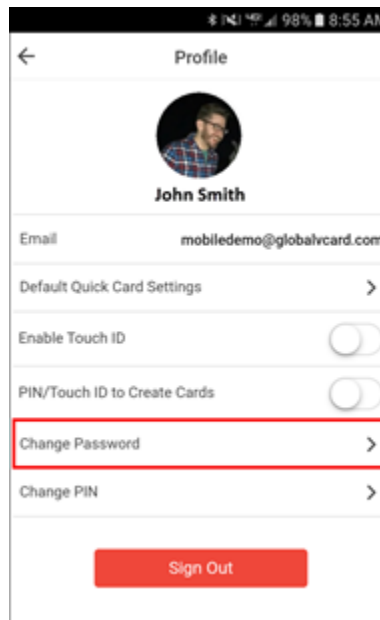
4. The main dashboard screen opens.



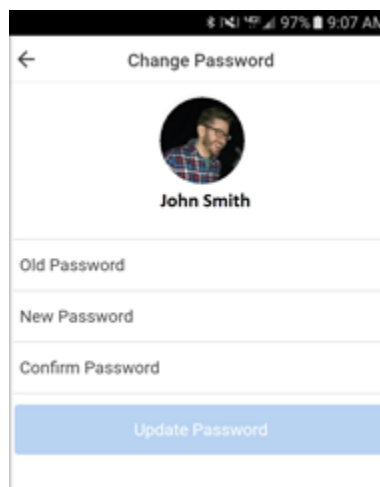
Change Password

If you are a first-time user, you will log in to the app using the username and temporary password you receive via email from noreply@csipaysystems.com. Upon logging in for the first time, you will be prompted to change your password. At any time, you can also change your password within your profile settings. Follow these steps to change your password:

1. On the main dashboard screen, tap the menu button  in the top-left corner, and then select **Profile** from the list of options.
2. The **Profile** screen opens. Tap on the **Change Password** option.



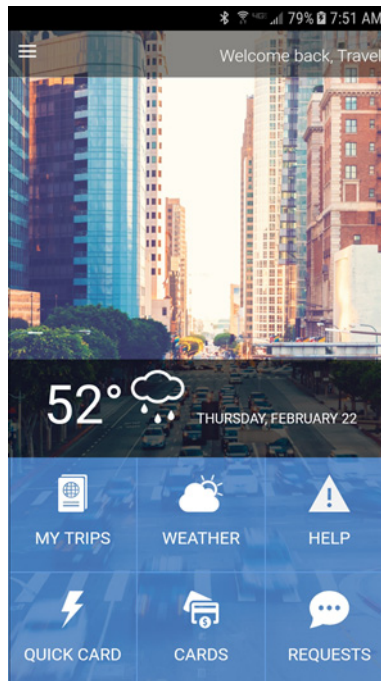
3. The **Change Password** screen opens. Enter your **Old Password** and your **New Password**. Then, re-enter the new password in the **Confirm Password** field. Passwords must meet the following criteria:
 - at least 14 characters with a maximum length of 64 characters
 - must contain upper and lowercase letters
 - must contain at least one number
 - must contain at least one of the following special characters: !@#\$%^_
 - cannot be the same as the username used to access the application




4. After entering the appropriate information, tap the **Update Password** button.

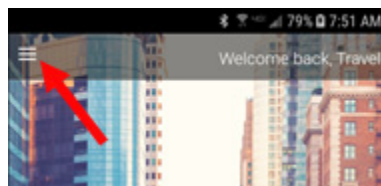
General Navigation

After logging in to the CSI Go app, the main dashboard screen opens.

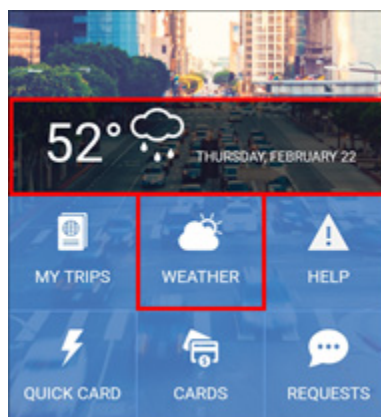


Depending on your permissions, you can perform the following actions:

- Select one of the options listed along the bottom of the screen (**Travelers**, **My Trips**, **Weather**, **Quick Card**, **Cards**, or **Requests**) to view or manage travel information.
- Tap the menu button  in the top-left corner to select an option from the list. Alternatively, you can slide right within the app to access the menu. (For more information, see “Menu” on page 22 of the guide.)

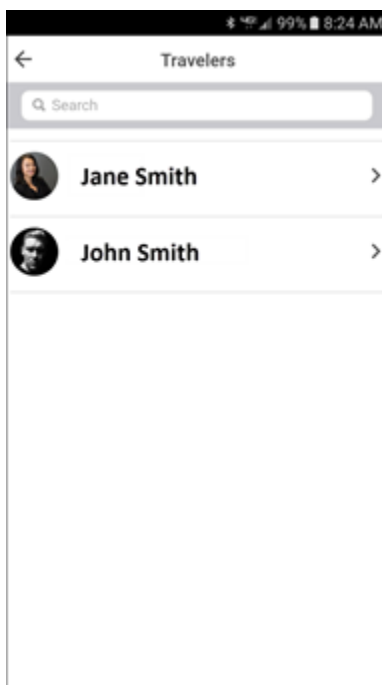


- Tap on the weather/date along the middle of the main dashboard screen to view weather information for the next 10 days. (Alternatively, you can tap the **Weather** option along the bottom of the screen.)

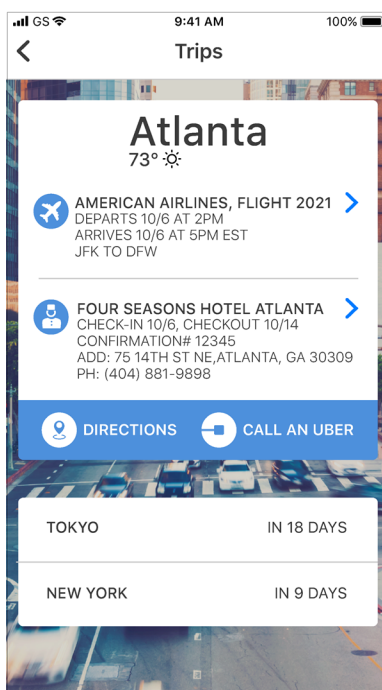


Travelers

Tap on the **Travelers** option on the main dashboard to open the **Travelers** screen. The **Travelers** screen allows Company Administrators to view a list of all CSI Go users on the company account.



Select a traveler from the list and the **Trips** screen opens, displaying details about upcoming and previous trips associated with that traveler. Details for the user's next trip are displayed at the top of the screen.



From here, you can:

- Tap on the arrow associated with the user's next trip to view trip details. For more information, see "Trip Details" on page 8 of this guide.
- Tap on the **Directions** link to view directions to open the default map application on your mobile device.
- Tap on the **Call an Uber** link to open the Uber application on your mobile device.
- Tap on a trip listed along the bottom of the screen to view trip details, or swipe left to delete the trip.

Trip Details

The **Trips** screen allows you to tap on the arrow associated with one of the user's next trips (i.e., the trips listed at the top of the screen) to view trip details.

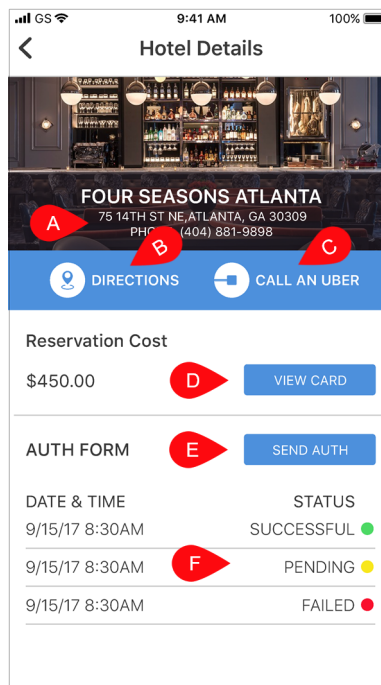
There are three types of trips:

- Hotels
- Flights
- Car Rentals

Hotel Details

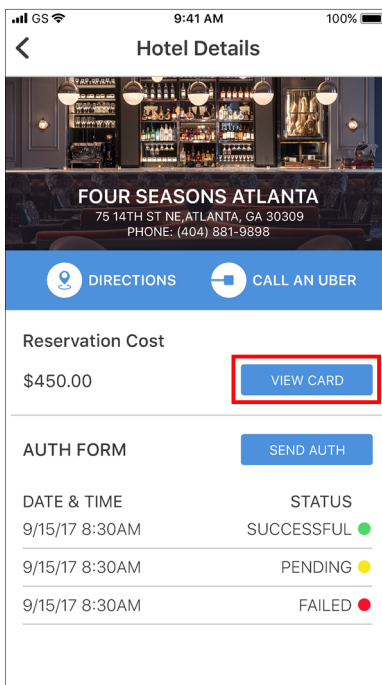
On the **Hotel Details** screen, you can:

- View the name, address, and phone number for the trip. If your mobile device has the ability to place calls, tap on the phone number to initiate a call.
- Tap on the **Directions** link to open the default map application on your mobile device.
- Tap on the **Call an Uber** link to open the Uber application on your mobile device.
- Tap the **View Card** button to view virtual card details. For more information, see "View Card" on page 9 of this guide.
- Tap the **Send Auth Form** button to resend the credit card authorization form to the hotel. For more information, see "Send Authorization Form" on page 11 of this guide.
- View the **Date/Time** the credit card authorization form was last sent to the hotel and the **Status** of the submission (Successful, Pending, or Failed).



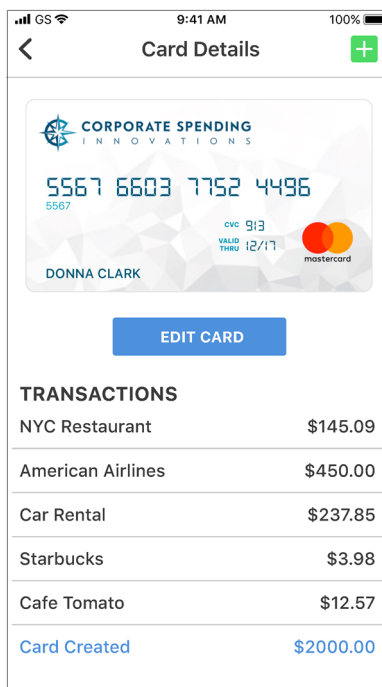
View Card

While viewing details for a trip, you can tap on the **View Card** button to view virtual card details.



From here, you can:

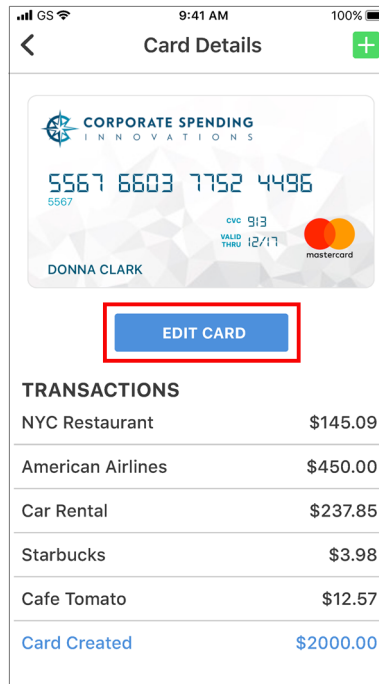
- View an image of the virtual card, including the full card number, CVC, and expiration date.
- Tap the green plus sign button to create a new virtual card.
- Tap the **Edit Card** button to edit the virtual card. For more information, see “Edit a Virtual Card” on page 10 of this guide.
- View the transaction history for the card.



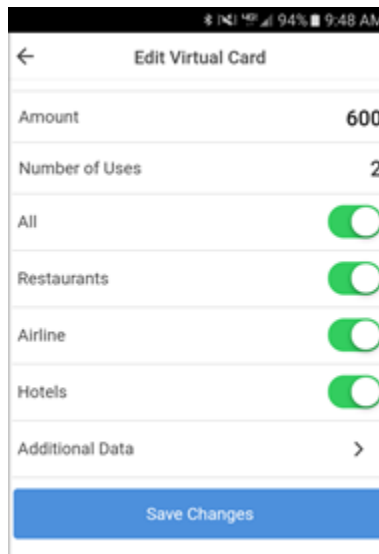
Edit a Virtual Card

To edit a virtual card, follow these steps:

1. On the **Card Details** screen, tap the **Edit Card** button.



2. The **Edit Virtual Card** screen opens, displaying the total **Amount** of the card, the **Number of Uses**, and where the card can be used.



From here, you can:

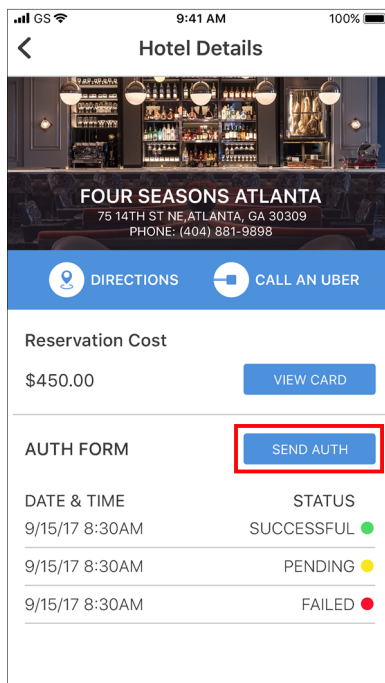
- Tap in the **Amount** field to edit the value.
- Tap in the **Number of Uses** field to select an option from the list.
- Toggle the options on/off to select where the virtual card can be used.
- Tap on the **Additional Data** option to edit additional card details (e.g., **Name**, **Expiration Period**, **Notes**, and additional **Usage Types**).

3. After making the necessary changes, tap **Save Changes**.

Send Authorization Form

By default, CSI Paysystems sends the credit card authorization form to hotels on the day of booking the reservation and then again on the day of check-in. To manually send a copy of the authorization form, follow these steps:

1. While viewing details for a trip, tap on the **Send Auth** button.

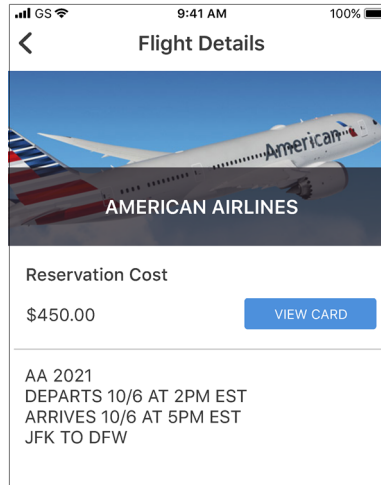


2. The **Select a method** window opens, allowing you to select how to send the credit card authorization form (Fax or Email). Select an option, and then enter the appropriate information.
3. Tap the **Send** button to send the form.

Flight Details

On the **Flight Details** screen, you can:

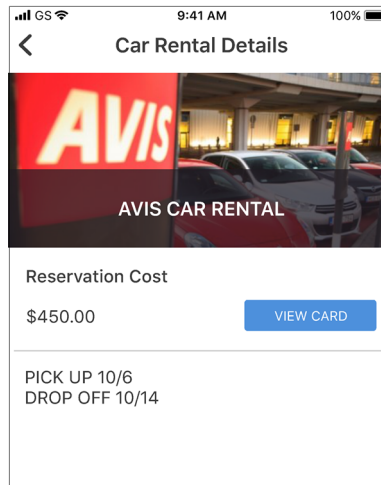
- View details about the flight (e.g., departure and arrival time).
- Tap the **View Card** button to view virtual card details. For more information, see “View Card” on page 9 of this guide.



Car Rental Details

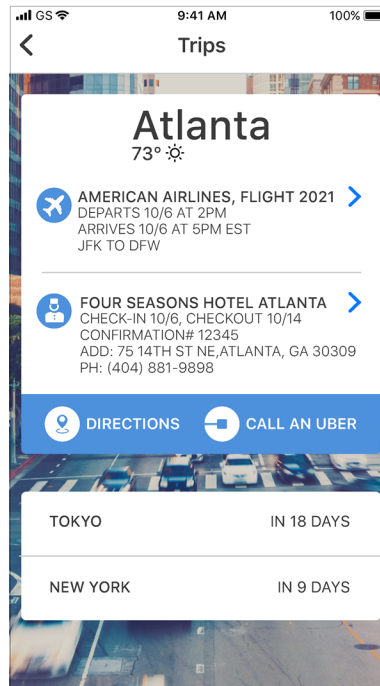
On the **Car Rental Details** screen, you can:

- View details about the car rental (e.g., pick-up and return time).
- Tap the **View Card** button to view virtual card details. For more information, see “View Card” on page 9 of this guide.



My Trips

Tap on the **My Trips** option on the dashboard to open the **Trips** screen. This screen displays details about upcoming and previous trips associated with the current user logged in to the app. Details for your next trip are displayed at the top of the screen.

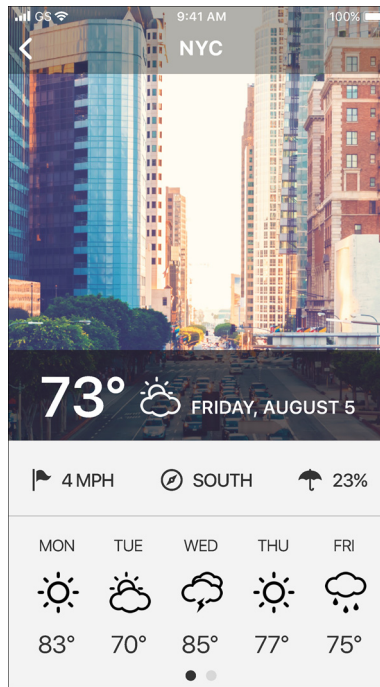


From here, you can:

- Tap on the arrow associated with the user's next trip to view trip details. For more information, see "Trip Details" on page 8 of this guide.
- Tap on the **Directions** link to open the default map application on your mobile device.
- Tap on the **Call an Uber** link to open the Uber application on your mobile device.
- Tap on a trip listed along the bottom of the screen to view trip details, or swipe left to delete a trip.

Weather

Tap on the **Weather** option on the dashboard to view a snapshot of what the weather will be like in your current area for the next 10 days. By default, this screen displays a 5-day forecast. Swipe left at the bottom of the screen to view details for the next 5 days.



Quick Card

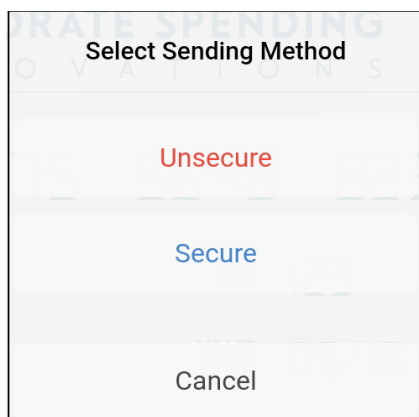
Tap on the **Quick Card** option on the dashboard to instantly create a virtual card within the application. If this is your first time using this feature, you will be prompted to **Enter a Default Quick Card Amount**. The virtual card then appears on the screen. (If you are a returning user, you will automatically be directed to the virtual card image upon tapping the **Quick Card** option on the dashboard.)


The virtual card will look similar to this:



Tap on the card image to reveal additional options along the top of the screen. From here, you can tap to select one of the following options:

- **Back** returns you to the dashboard screen
- **Copy CC#** copies the credit card number to your clipboard
- **Copy CVC** copies the CVC to your clipboard
- **Copy Exp** copies the expiration date to your clipboard
- **Send...** allows you to select a way to send the virtual card to someone. When you tap this option, the **Select Sending Method** window opens. Select one of the following options:
 - **Unsecure** allows you to send the card image to someone via email or text. For more information, see “Unsecure Sending Method” on page 16 of this guide.
 - **Secure** allows you to send a secure link to someone so they can log in and view card details. For more information, see “Secure Sending Method” on page 17 of this guide.



- The information button  opens the **Virtual Card** screen, allowing you to view virtual card details and edit the card. For more information about editing a virtual card, see “Edit a Virtual Card” on page 10 of this guide.

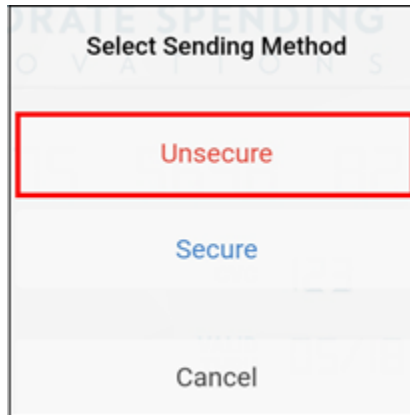
Unsecure Sending Method

The CSI Go app allows you to send virtual card details to a recipient you specify. To send virtual card information to someone via email or text, follow these steps:

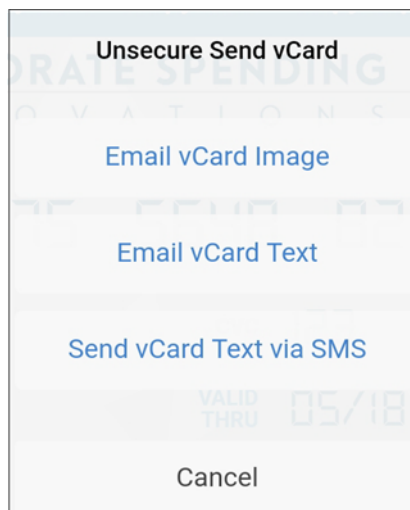
1. While viewing the virtual card image, tap to select the **Send...** option at the top of the screen.



2. The **Select Sending Method** window opens. Tap to select the **Unsecure** option.



3. The application will ask you to confirm that you wish to perform this action. Tap **Yes** to continue.
4. The **Unsecure Send vCard** window opens. From here, you can select one of the following delivery methods:
 - Email vCard Image
 - Email vCard Text
 - Send vCard Text via SMS



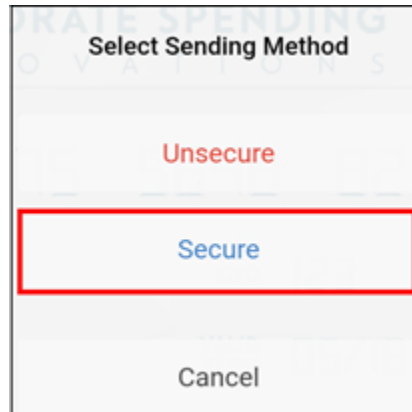
Secure Sending Method

The CSI Go app allows you to send virtual card details to a recipient you specify. To securely send this information, follow these steps:

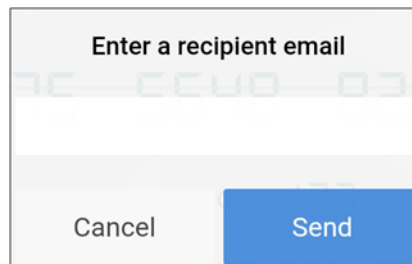
1. While viewing the virtual card image, tap to select the **Send...** option at the top of the screen.



2. The **Select Sending Method** window opens. Tap to select the **Secure** option.



3. The **Enter a recipient email** window opens. Enter an email address in the field, then tap **Send** to send the virtual card details.

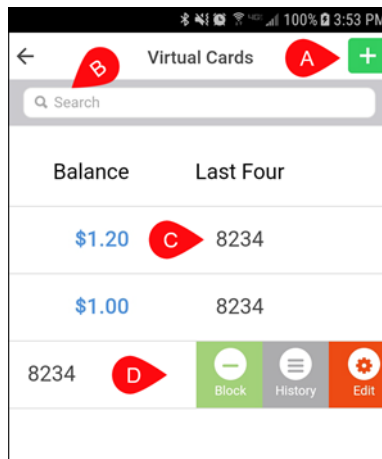


Cards

Tap on the **Cards** option on the dashboard to open the **Virtual Cards** screen. The **Virtual Cards** screen displays the **Balance** and **Last Four** digits of all the physical credit cards and virtual cards associated with your account.

From here, you can:

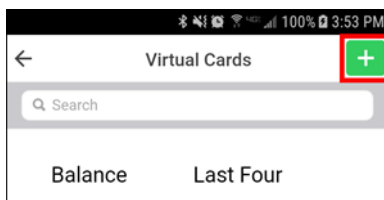
- A. Tap the green plus sign button to create a new virtual card. For more information, see “Create Virtual Card” on page 19 of this guide.
- B. Search for a specific card.
- C. Tap on a card in the list to open the **Virtual Card** page, which displays virtual card details and allows you to edit the card. For more information about editing a virtual card, see “Edit a Virtual Card” on page 10 of this guide.
- D. Swipe left on a card in the list to select one of the following options:
 - **Block/Unblock** the card (If you select this option, the app will ask you to confirm you wish to perform this action.)
 - View the card **History** (This will open the **Card Activity** screen. Tap on the activity to view **Transaction Details**.)
 - **Edit** the card (This will open the **Edit Virtual Card** screen. For more information about how to use this screen, see “Edit a Virtual Card” on page 10 of this guide.)



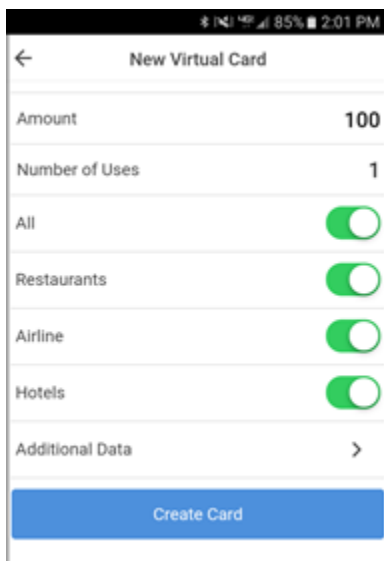
Create Virtual Card

To create a virtual card from the **Virtual Cards** page, follow these steps:

1. Tap the green plus sign button in the top-right corner of the screen.



2. The **New Virtual Card** screen opens.



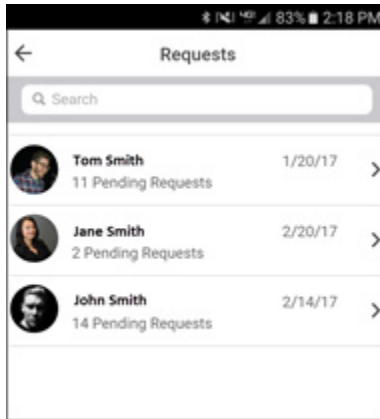
From here, you can:

- Tap in the **Amount** field to edit the value.
- Tap in the **Number of Uses** field to select an option from the list.
- Toggle the options on/off to select where the virtual card can be used.
- Tap on the **Additional Data** option to edit additional card details (e.g., **Name**, **Expiration Period**, **Notes**, and additional **Usage Types**).

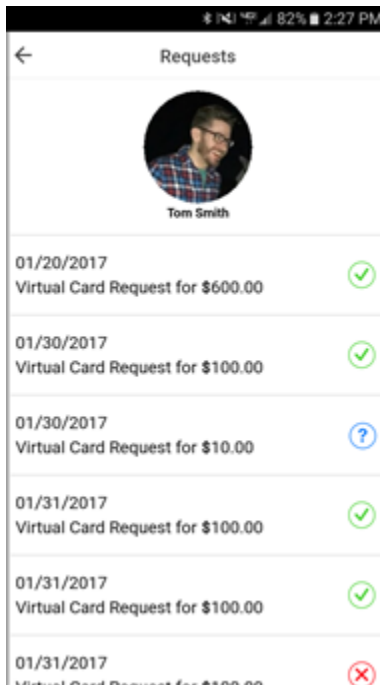
3. After making the necessary changes, tap **Create Card**.

Requests

Tap on the **Requests** option on the dashboard to open the **Requests** screen. This screen displays a list of users who have submitted card creation requests, the number of requests associated with their account, and the date of their oldest request.



Use the **Search** bar to locate a specific user, or simply scroll through the list and tap to select the appropriate user. Once you select a user, the **Requests** screen opens, displaying a list of all requests associated with this user.



In the far-right column, a symbol indicates the status of the request:

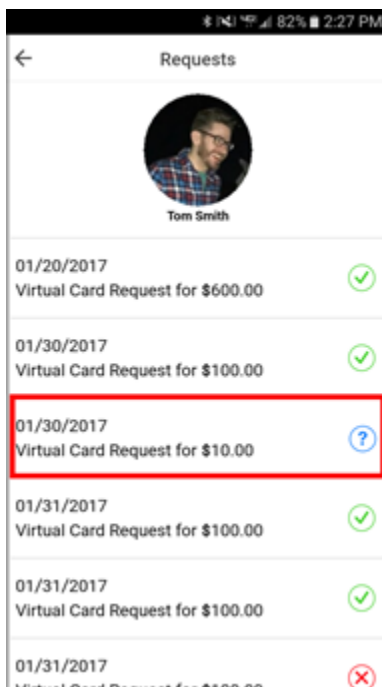
- A green checkmark indicates that the request was approved.
- A red X indicates that the request was denied.
- A blue question mark indicates that the request is pending and must still be approved or denied by an authorized user. For more information, see “Approve or Deny Requests” on page 21 of this guide.

Tap to select a request to view request details and/or approve/deny a request that is pending.

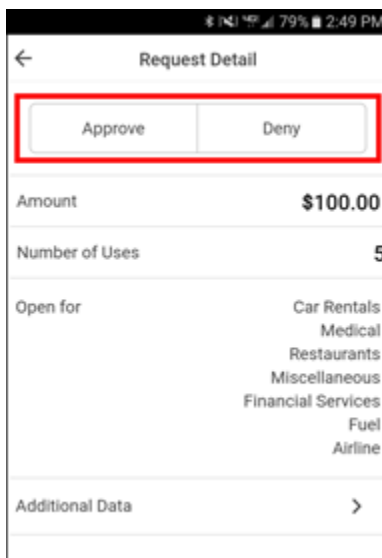
Approve or Deny Requests

The **Requests** screen displays a list of all requests associated with a user. If a request has a blue question mark associated with it, that indicates that the request is pending and calls for further action. To approve or deny a request, follow these steps:

1. Tap to select a request that has a blue question mark associated with it.




2. The **Request Detail** screen opens. View the details of the request and then tap to **Approve** or **Deny**.




3. Upon returning to the **Requests** screen, you will see that the request you just approved or denied no longer has a blue question mark associated with it.

Menu

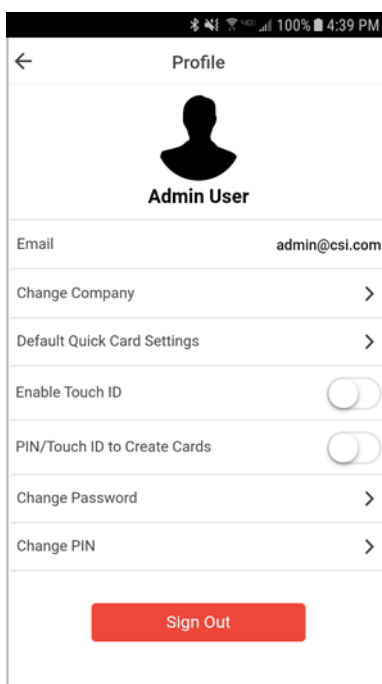
Tap the menu button  in the top-left corner of the dashboard to access the application menu. Depending on your permissions, you can select one of the following options from the list:

- **Profile** allows you to view/edit your profile settings. For more information, see “Profile Settings” on page 23 of this guide.
- **My Trips** displays details about upcoming and previous trips associated with the current user logged in to the app. For more information, see “My Trips” on page 13 of this guide.
- **Travelers** displays a list of all CSI Go users on the company account. For more information, see “Travelers” on page 7 of this guide.
- **Cards** opens the Virtual Cards screen, displaying the **Balance** and **Last Four** digits of all the physical credit cards and virtual cards associated with your account. For more information, see “Cards” on page 18 of this guide.
- **Cardholders** opens the **Cardholders** page, displaying a list of CSI Go users on the company account. Select a user to view **Virtual Cards** associated with that user. For more information about how to use this page, see “Cards” on page 18 of this guide.
- **Requests** opens the **Requests** page, displaying a list of users who have submitted card creation requests, the number of requests associated with their account, and the date of their last request. For more information, see “Requests” on page 20 of this guide.
- **Help** displays the various ways you can reach out for assistance with the application:
 - Tap on the phone number to call CSI for assistance.
 - Tap the email address to open your default email client on your mobile device and compose an email.
 - Tap the **Online - FAQs** link to open the support website for the application in your mobile browser.
- **Sign Out** allows you to sign out of the application.

Profile Settings

To view/edit your profile settings, tap on the menu button  in the top-left corner of the dashboard. The Profile screen opens. From here, you can:

- View the **Email** associated with your account.
- **Change Company** (if you have access to multiple accounts)
- Edit **Default Quick Card Settings**.
- **Enable Touch ID** (If applicable, this allows the app to take advantage of your device's fingerprint scanner.)
- Select whether the app will require a PIN or Touch ID to create virtual cards.
- **Change Password**
- **Change PIN**



Appendix: FAQ

This section of the guide answers some frequently asked questions about the CSI Go application.

1. What should I do if I forget my username or password?

Your username is the email address your account was registered with. Typically, this is the same address as your work email.

If you have forgotten your password, you can tap the **Forgot Your Password?** link on the **Log In** screen of the app (or click [here](#)) and enter your username. You will be emailed a temporary password. Once you receive the email with the temporary password, log in with that password. You will be prompted to create a new password once you log in.

For more assistance, call 1-888-DIG-TRVL or email travel@corporatespending.com

2. What should I do if I forget my PIN?

To reset your PIN, follow these steps:

1. Go to the home screen on your device and tap the **Settings** icon.
2. Scroll down and select **CSI**.
3. Under the **PIN Reset** section, select **Forgot PIN**.
4. Make sure the CSI Go app is closed by double-clicking the home button, swiping left/right until you find the CSI Go preview, and then swiping up on the preview.
5. Open the CSI Go app and you will be prompted to log in and enter a new PIN.

3. How do I unlock my account?

If you enter your login information incorrectly three times, you will be locked out of your CSI Travel account. When your account is locked out, you will have to contact your Company Administrator or CSI Help (call 1-888-DIG-TRVL or email travel@corporatespending.com) to be sent an email with a new temporary password.

Once you receive the email with the temporary password, log in using that password. You will then be prompted to create a new password.

4. Why is my card declining?

Your plastic and/or virtual card could decline in the following conditions:

- **Incorrect Information** - Remember to double-check all card information, such as the card number, CVC, expiration date, etc. A quick edit is usually all that needs to be done to get the card working properly.
- **Number of Transactions Exceeded** - The card is created with a specific amount of allowed transactions (e.g., for virtual cards, this usually defaults to 2 transactions). If the card is authorized for more than the specified amount of transactions, this will cause the card to decline. Lingering authorizations sometimes occur, and original authorizations should be pushed through for processing to collect payment.
- **Blocked Card** - Check to make sure your plastic and/or virtual card is not blocked.
- **Insufficient Funds** - If your account is pre-funded, the purchase(s) you are making may exceed the available funds in your account. You will need to apply additional funds to your account before the purchase(s) will be able to be completed.
- **Restricted Usage** - Your card may not have access to make purchases of this kind (i.e., the purchase is not covered by the current merchant category codes allowed on your card). Contact your Company Administrator to see if you are authorized to make purchases in this industry.

5. Do I need an Internet connection to use the application?

The CSI Go app requires that you either have an Internet connection or that you have a cellular data source (e.g., 3G, 4G, or LTE).

6. What are some best practices for the CSI Travel service?

The following are some best practices for the CSI Travel service:

- After you book your first trip on this program, a welcome email from CSI is sent to your email. This email contains login credentials for the application.
- When checking in, mention that payment for your room and tax have already been provided via the credit card authorization form that was faxed to the hotel.
 - Verify that the last four digits on the card authorization form match the card shown in the mobile app for that specific hotel stay.
 - If the front desk has a different card on file and it is declining, explain that it is a placeholder card. Then, re-fax or email the correct card from the mobile app.
- Depending on your company's travel policy, a separate card for incidentals may be required. Clarify that the card sent by your company is for room and tax only.
- The card should be authorized at check-in and posted at check-out.
- If the virtual card declines, confirm the following information with the hotel:
 - They are not processing the card for more than the authorized amount
 - They are not attempting more than the allowed number of transactions
 - The expiration date has been entered correctly.
- If those troubleshooting steps do not resolve the decline, please have the front desk contact the CSI Travel Department to assist further at 888-dig-trvl or email travel@corporatespending.com

7. How soon will I be able to view my travel bookings in the CSI Go app?

All CSI Travel bookings reserved with and/or paid for using a virtual card will be exposed to you on the **Trips** screen of the mobile app as soon as the payment has been created in CSI Paysystems.

8. Is trip or virtual card information stored on my mobile device?

There is no information stored on your device. In the case of a loss or theft, simply reinstall the app on your new device and log in. All your virtual cards and trips will be just as you left them.

9. How long will a trip remain in the application after the trip has occurred?

Unless you delete a trip, any trip that was booked with and/or paid for using a virtual card will remain in the CSI Go app indefinitely.

10. If my travel plans change, will the application update automatically?

If travel plans change before the specified hotel check-in date, reservation details concerning virtual cards will update automatically in app.

11. If my trip was canceled, will I still be able to view it in the CSI Go application?

If your canceled trip was booked with a virtual card, it will still be visible within the app. However, if you would like to delete it from view, you can do so by swiping left on the **Trip** screen.

12. Will the application work while my device is in airplane mode?

Yes, if you are connected to a WiFi source, you will be able to use the app.

13. Can I view other travelers' trips on the application?

If you are the Company Administrator on the account, the app gives you the ability to view all travelers' trips reserved and/or paid for using a virtual card. No other users can view other travelers' trips.

14. How do I manage timezone changes in the app while traveling?

Flight, Hotel, and Car reservations are listed (and will remain) in the time zone where the reservations were made.