360Control Business Credit Card Management System

Overview

Washington Trust Bank

Member FDIC

Privately Owned. **Locally Invested.**

Updates:

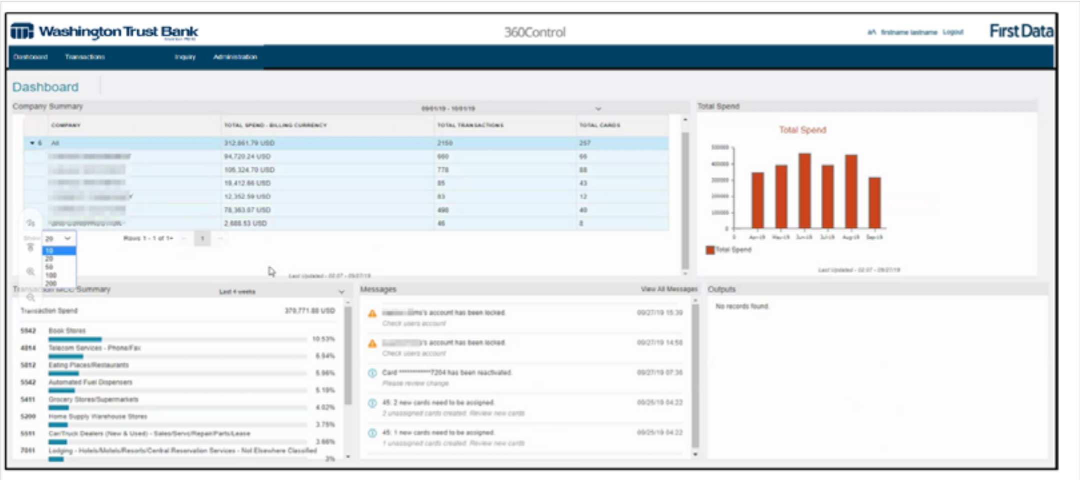
August 11, 2023

- Guide created.

The 360Control Business Management System enables you to manage your business credit card program in real time for better control of business expenses.

Dashboard

When logging in to 360Control, you will be directed to the company **Dashboard**. The information displayed here provides a personalized company overview.



Company Summary displays the company spend in the current statement cycle, the amount of credit available, the total company credit limit and the number of cards issued to the company.

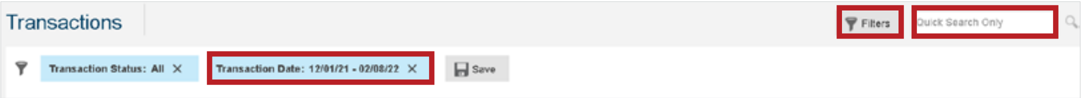
Total Spend displays total card spend by month in a bar graph format.

The Transaction Merchant Category Code Summary displays a bar graph reporting transaction volume as a percentage of total spend by merchant category. Click in the top right corner to change the reporting time frame.

Transactions Tab

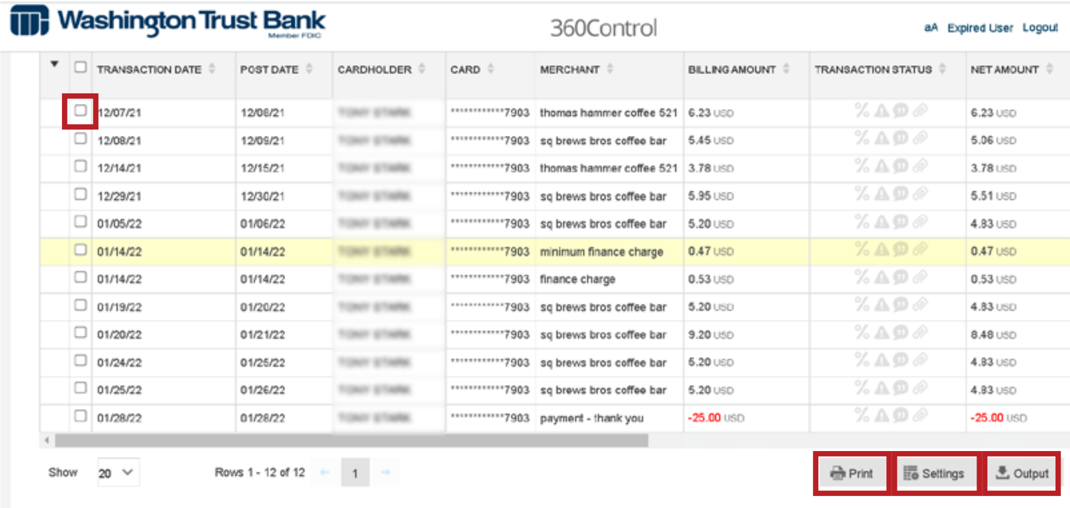
The Transaction tab displays all cardholder transactions that have posted to company card accounts.

The most important thing to remember here is to check the **Transaction Date Range**. You may need to click on the **Filters** button to adjust your dates. You can also use the **Quick Search Only** box to locate transactions by cardholder name, merchant name and more.



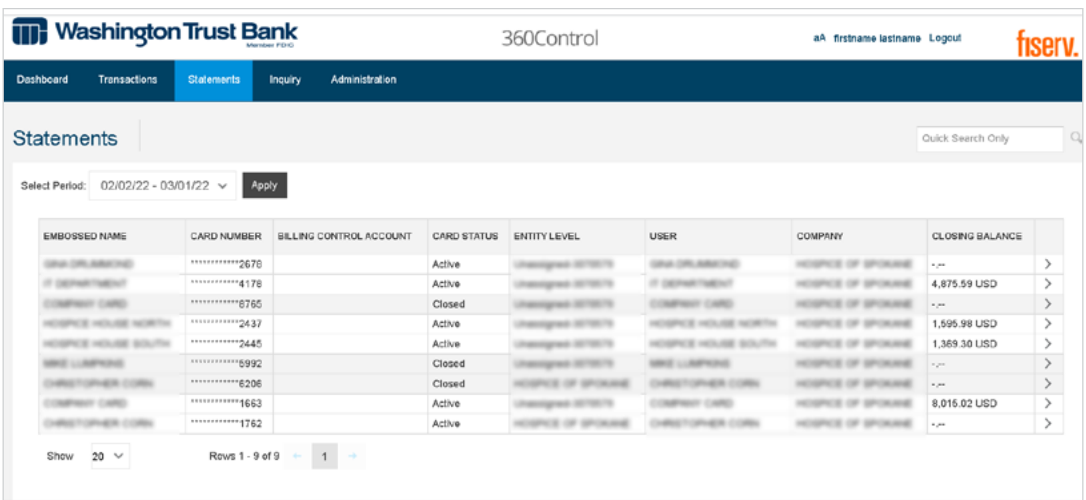
Clicking on the box to the left of the transaction date will provide additional information about the transaction and provide the opportunity to attach a receipt or add a comment.

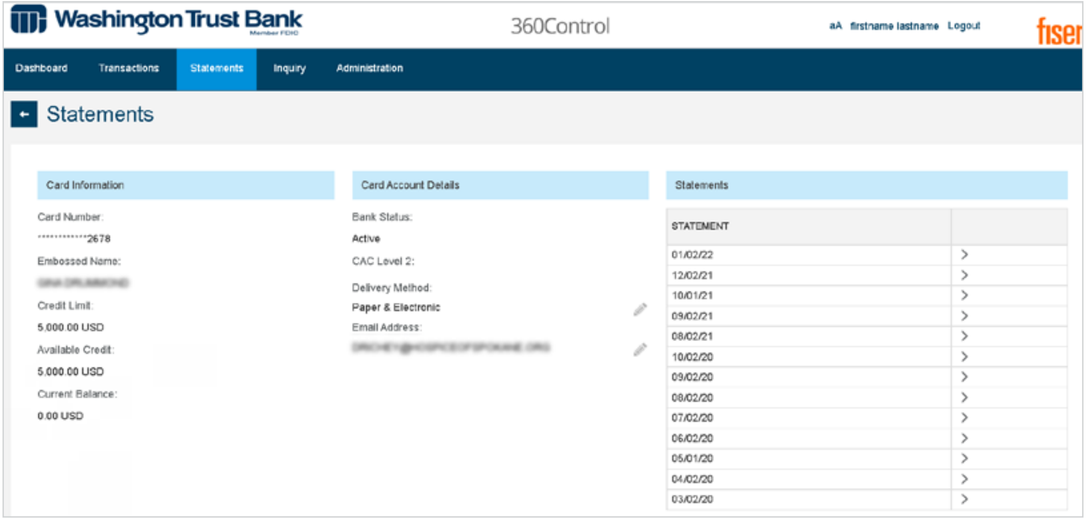
By clicking on the **Settings** button you can add or delete columns and adjust the order of your columns. The **Output** button enables you to download your transaction report into an Excel, OFX or QBO format.



Statements Tab

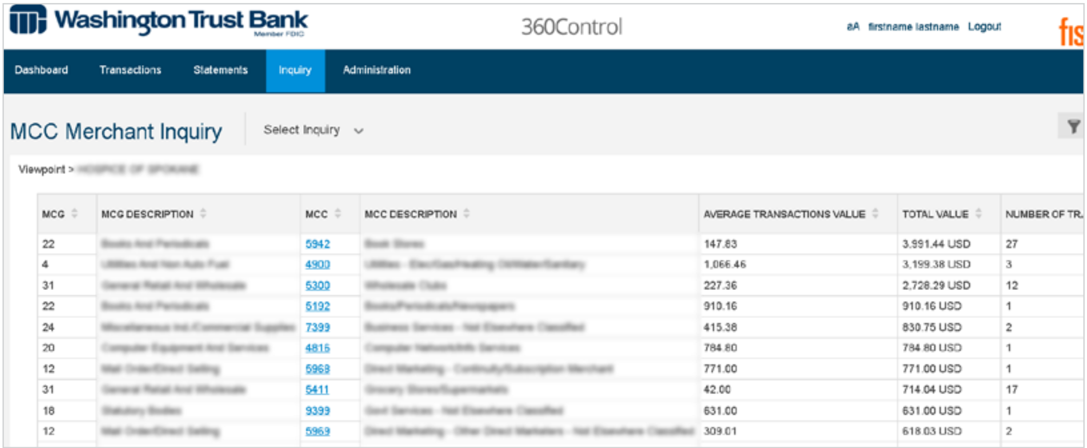
The **Statements** tab shows a repository of your statements. Select the cardholder whose statement or statements you wish to view. Click on the statement date and a statement image document will display in a PDF format for viewing, printing or downloading. You can also use this page to turn off paper statements.





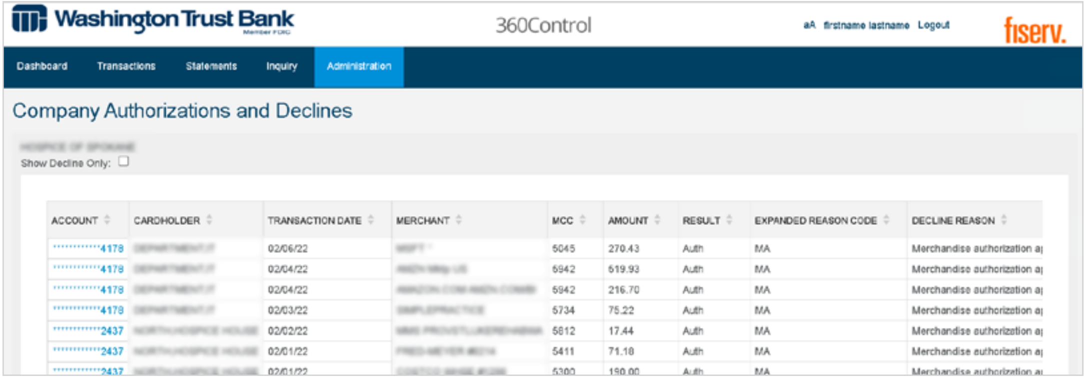
Inquiry Tab

Use the **Inquiry** tab to view reports such as the Merchant Inquiry Report to see where your cardholders are spending by merchant category. Use the links to drill down for even more information.

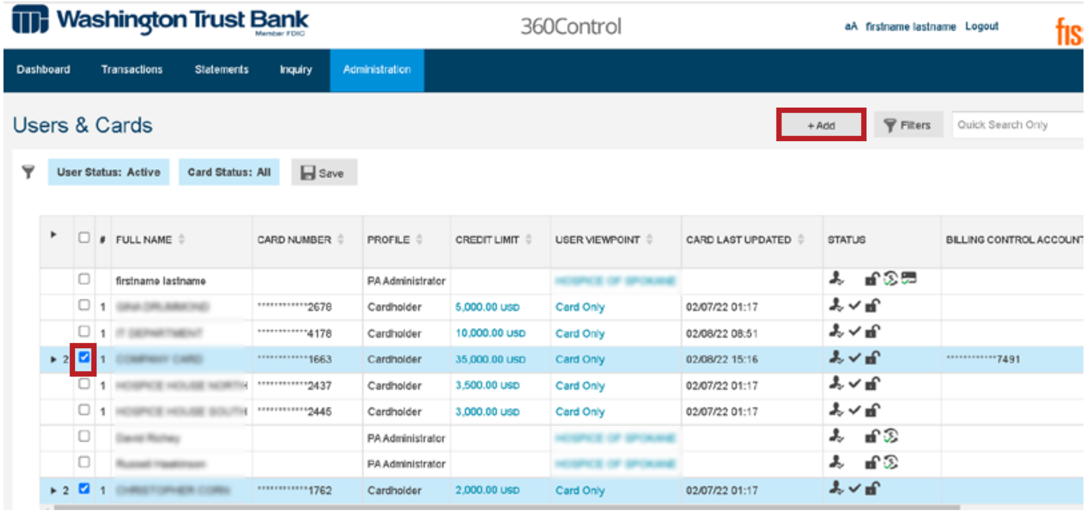


Administration Tab

Click on the **Administration** tab and select **Company Authorizations and Declines** to view your cardholder activity in real time and be able to quickly resolve card declines.

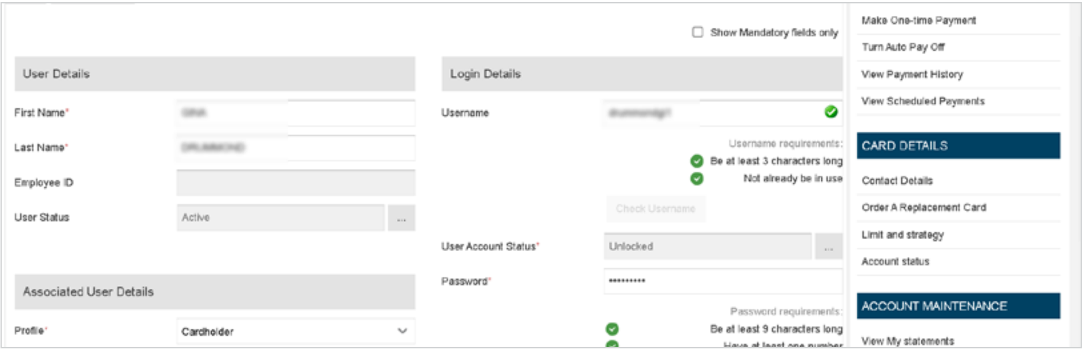


Selecting **Users & Cards** will provide a snapshot of all cardholders and company 360Control Admin users.



Click the **+Add** button to create new cards or **Admin users**.

Clicking on the box to the left of the cardholder name will provide additional cardholder information as well as the ability to conduct cardholder maintenance including activating new cards, making a payment (individually billed accounts only), ordering a replacement card, adjusting the credit limits, closing a card and adding travel notifications.



Finally, if your account set-up includes corporate billing where all transactions roll up to a central account for billing, click on **Billing Control Accounts** from the **Administration** tab to make your business credit card payment.