

# 360Control Business Credit Card Management System Overview



## Updates:

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August 11, 2023

- Guide created.

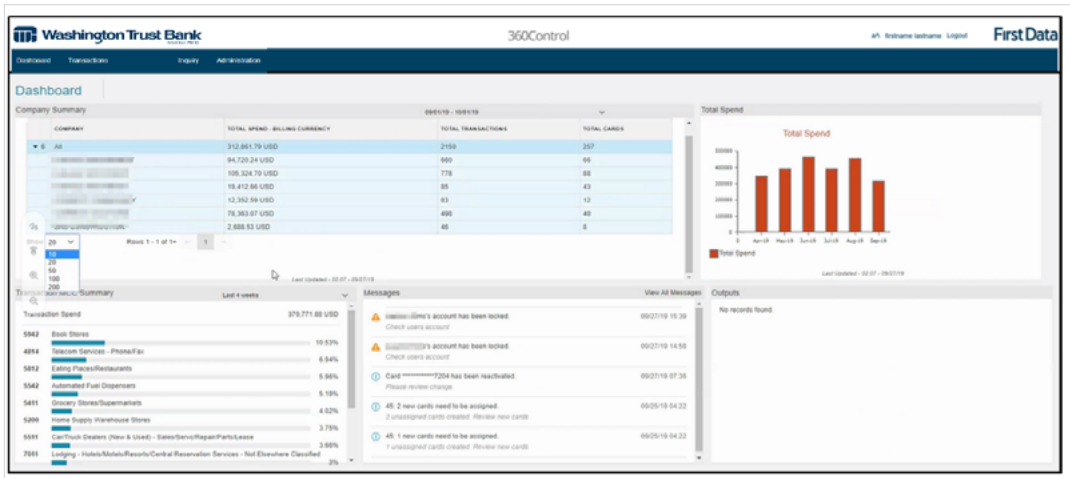
# Overview

## 360Control Reference Guide

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.

TRANSACTION DATE	POST DATE	CARDHOLDER	CARD	MERCHANT	BILLING AMOUNT	TRANSACTION STATUS	NET AMOUNT
<input type="checkbox"/> 12/07/21	12/06/21	*****7903	*****7903	thomas hammer coffee 521	6.23 USD	% ⚠️ 📄	6.23 USD
<input type="checkbox"/> 12/08/21	12/06/21	*****7903	*****7903	sq brews bros coffee bar	5.45 USD	% ⚠️ 📄	5.06 USD
<input type="checkbox"/> 12/14/21	12/15/21	*****7903	*****7903	thomas hammer coffee 521	3.78 USD	% ⚠️ 📄	3.78 USD
<input type="checkbox"/> 12/29/21	12/30/21	*****7903	*****7903	sq brews bros coffee bar	5.95 USD	% ⚠️ 📄	5.51 USD
<input type="checkbox"/> 01/05/22	01/06/22	*****7903	*****7903	sq brews bros coffee bar	5.20 USD	% ⚠️ 📄	4.83 USD
<input type="checkbox"/> 01/14/22	01/14/22	*****7903	*****7903	minimum finance charge	0.47 USD	% ⚠️ 📄	0.47 USD
<input type="checkbox"/> 01/14/22	01/14/22	*****7903	*****7903	finance charge	0.53 USD	% ⚠️ 📄	0.53 USD
<input type="checkbox"/> 01/19/22	01/20/22	*****7903	*****7903	sq brews bros coffee bar	5.20 USD	% ⚠️ 📄	4.83 USD
<input type="checkbox"/> 01/20/22	01/21/22	*****7903	*****7903	sq brews bros coffee bar	9.20 USD	% ⚠️ 📄	8.48 USD
<input type="checkbox"/> 01/24/22	01/25/22	*****7903	*****7903	sq brews bros coffee bar	5.20 USD	% ⚠️ 📄	4.83 USD
<input type="checkbox"/> 01/25/22	01/26/22	*****7903	*****7903	sq brews bros coffee bar	5.20 USD	% ⚠️ 📄	4.83 USD
<input type="checkbox"/> 01/28/22	01/28/22	*****7903	*****7903	payment - thank you	-25.00 USD	% ⚠️ 📄	-25.00 USD

Show 20 Rows 1 - 12 of 12 1

Print Settings Output

## 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.

Washington Trust Bank 360Control aa first name lastname Logout fiserv.

Dashboard Transactions **Statements** Inquiry Administration

Statements Quick Search Only

Select Period: 02/02/22 - 03/01/22 Apply

EMBOSSED NAME	CARD NUMBER	BILLING CONTROL ACCOUNT	CARD STATUS	ENTITY LEVEL	USER	COMPANY	CLOSING BALANCE
USA DRUMMING	*****2678		Active	Washington State	USA DRUMMING	HOSPICE OF SPOKANE	-.-
IT DEPARTMENT	*****4178		Active	Washington State	IT DEPARTMENT	HOSPICE OF SPOKANE	4,875.59 USD
COMPANY CARD	*****8765		Closed	Washington State	COMPANY CARD	HOSPICE OF SPOKANE	-.-
HOSPICE HOUSE NORTH	*****2437		Active	Washington State	HOSPICE HOUSE NORTH	HOSPICE OF SPOKANE	1,595.98 USD
HOSPICE HOUSE SOUTH	*****2445		Active	Washington State	HOSPICE HOUSE SOUTH	HOSPICE OF SPOKANE	1,369.30 USD
WMC LUMBER	*****9992		Closed	Washington State	WMC LUMBER	HOSPICE OF SPOKANE	-.-
CHRISTOPHER CORN	*****2206		Closed	HOSPICE OF SPOKANE	CHRISTOPHER CORN	HOSPICE OF SPOKANE	-.-
COMPANY CARD	*****1663		Active	Washington State	COMPANY CARD	HOSPICE OF SPOKANE	8,015.02 USD
CHRISTOPHER CORN	*****1762		Active	HOSPICE OF SPOKANE	CHRISTOPHER CORN	HOSPICE OF SPOKANE	-.-

Show 20 Rows 1 - 9 of 9 1

Washington Trust Bank 360Control aa first name lastname Logout fiserv.

Dashboard Transactions **Statements** Inquiry Administration

← Statements

Card Information	Card Account Details	Statements																												
<p>Card Number: *****2678</p> <p>Embossed Name: USA DRUMMING</p> <p>Credit Limit: 5,000.00 USD</p> <p>Available Credit: 5,000.00 USD</p> <p>Current Balance: 0.00 USD</p>	<p>Bank Status: Active</p> <p>CAC Level 2:</p> <p>Delivery Method: Paper &amp; Electronic</p> <p>Email Address: *****@*****.com</p>	<table border="1"> <thead> <tr> <th>STATEMENT</th> <th></th> </tr> </thead> <tbody> <tr><td>01/02/22</td><td>&gt;</td></tr> <tr><td>12/02/21</td><td>&gt;</td></tr> <tr><td>10/01/21</td><td>&gt;</td></tr> <tr><td>09/02/21</td><td>&gt;</td></tr> <tr><td>08/02/21</td><td>&gt;</td></tr> <tr><td>10/02/20</td><td>&gt;</td></tr> <tr><td>09/02/20</td><td>&gt;</td></tr> <tr><td>08/02/20</td><td>&gt;</td></tr> <tr><td>07/02/20</td><td>&gt;</td></tr> <tr><td>06/02/20</td><td>&gt;</td></tr> <tr><td>05/01/20</td><td>&gt;</td></tr> <tr><td>04/02/20</td><td>&gt;</td></tr> <tr><td>03/02/20</td><td>&gt;</td></tr> </tbody> </table>	STATEMENT		01/02/22	>	12/02/21	>	10/01/21	>	09/02/21	>	08/02/21	>	10/02/20	>	09/02/20	>	08/02/20	>	07/02/20	>	06/02/20	>	05/01/20	>	04/02/20	>	03/02/20	>
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## 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.

MCC	MCC DESCRIPTION	MCC	MCC DESCRIPTION	AVERAGE TRANSACTIONS VALUE	TOTAL VALUE	NUMBER OF TR.
22	Restaurants/Periodicals	5942	Book Stores	147.83	3,991.44 USD	27
4	Utilities And Non-Rate Fuel	4900	Utilities - Electric/Electricity (Utilities/Services)	1,066.46	3,199.38 USD	3
31	General Retail And Wholesale	5300	Wholesale Clubs	227.36	2,728.29 USD	12
22	Restaurants/Periodicals	5192	Restaurants/Periodicals/Managers	910.16	910.16 USD	1
24	Wholesales And Commercial Supplies	7399	Business Services - Not Elsewhere Classified	415.38	830.75 USD	2
20	Computer Equipment And Services	4815	Computer Networks/IT Services	784.80	784.80 USD	1
12	Not Elsewhere Selling	5968	Direct Marketing - Contribution/Subscriptions/Merch	771.00	771.00 USD	1
31	General Retail And Wholesale	5411	Grocery Stores/Supermarkets	42.00	714.04 USD	17
18	Stationary Stores	9399	Gift Services - Not Elsewhere Classified	631.00	631.00 USD	1
12	Not Elsewhere Selling	5969	Direct Marketing - Other Direct Marketing - Not Elsewhere Classified	309.01	618.03 USD	2

## 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.

ACCOUNT	CARDHOLDER	TRANSACTION DATE	MERCHANT	MCC	AMOUNT	RESULT	EXPANDED REASON CODE	DECLINE REASON
*****4178	*****4178	02/06/22	WPT	5045	270.43	Auth	MA	Merchandise authorization a
*****4178	*****4178	02/04/22	WPT	5942	519.93	Auth	MA	Merchandise authorization a
*****4178	*****4178	02/04/22	WPT	5942	216.70	Auth	MA	Merchandise authorization a
*****4178	*****4178	02/03/22	WPT	5734	75.22	Auth	MA	Merchandise authorization a
*****2437	*****2437	02/02/22	WPT	5812	17.44	Auth	MA	Merchandise authorization a
*****2437	*****2437	02/01/22	WPT	5411	71.18	Auth	MA	Merchandise authorization a
*****2437	*****2437	02/01/22	WPT	5300	150.00	Auth	MA	Merchandise authorization a

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

#	FULL NAME	CARD NUMBER	PROFILE	CREDIT LIMIT	USER VIEWPOINT	CARD LAST UPDATED	STATUS	BILLING CONTROL ACCOUNT
1	firstname lastname		PA Administrator		VIEWPOINT > RESIDENCE OF SPOUSE			
1	*****2678	*****2678	Cardholder	5,000.00 USD	Card Only	02/07/22 01:17		
1	*****4178	*****4178	Cardholder	10,000.00 USD	Card Only	02/08/22 08:51		
2	*****1663	*****1663	Cardholder	35,000.00 USD	Card Only	02/08/22 15:16		*****7491
1	*****2437	*****2437	Cardholder	3,500.00 USD	Card Only	02/07/22 01:17		
1	*****2445	*****2445	Cardholder	3,000.00 USD	Card Only	02/07/22 01:17		
	PA Administrator		PA Administrator		VIEWPOINT > RESIDENCE OF SPOUSE			
	PA Administrator		PA Administrator		VIEWPOINT > RESIDENCE OF SPOUSE			
2	*****1762	*****1762	Cardholder	2,000.00 USD	Card Only	02/07/22 01:17		

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.

The screenshot displays a user management interface with the following sections:

- User Details:** Includes fields for First Name (John), Last Name (Doe), Employee ID, and User Status (Active).
- Associated User Details:** Shows the profile as 'Cardholder'.
- Login Details:** Includes Username (jdoe@corp.com) with a green checkmark, Password (masked), and User Account Status (Unlocked).
- Requirements:** Username requirements: Be at least 3 characters long, Not already be in use. Password requirements: Be at least 9 characters long, Have at least one number.
- Actions:** A list of actions including 'Make One-time Payment', 'Turn Auto Pay Off', 'View Payment History', 'View Scheduled Payments', 'CARD DETAILS', 'Contact Details', 'Order A Replacement Card', 'Limit and strategy', 'Account status', 'ACCOUNT MAINTENANCE', and 'View My statements'.

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.