jack henry™

SECURITY BANK
OF KANSAS CITY

JHA Card Processing Solutions™

JH Credit Processing™

360Control: Cardholder

Reference Guide

June 2020

Introduction

The 360Control commercial card management system enables you to manage commercial card transactions through a web-based user interface. This tool is designed to provide greater visibility and control of expenses. 360Control was designed to empower a business to manage certain aspects of a card program, including their accounting needs.

There are two roles within the system:

- Program Administrators
- Cardholders

Program Administrators (PAs) maintain their business' user and card details via the 360Control system. They have the ability to create and maintain user and card accounts, set spending limits and strategies, and run reports and inquiries.

Cardholders can view card transactions, statements, authorizations or declines on their card accounts, and update their personal information.

This guide provides documentation about the cardholder's key features within 360Control. Available features vary between each business.

Accessibility Compliance

Screens in the 360Control application are designed in compliance with the *Web Content Accessibility Guidelines (WCAG) 2.0 AA* standards to meet the needs of end users with disabilities and to ensure compatibility with screen reader tools.

Supported screen readers include:

- VoiceOver for Apple Safari® versions 5.1.7 and 7.02
- JAWS 13 for Microsoft® Internet Explorer version 9
- JAWS 13 for Mozilla® Firefox version 27

Web Browser Compatibility

The 360Control user interface (UI) is currently compatible with the following Web browsers:

- Microsoft® Internet Explorer versions 8.0, 9.0, 10.0, and 11.0
- Mozilla® Firefox (latest version)
- Apple Safari® (latest version)
- Google Chrome™ (latest version)

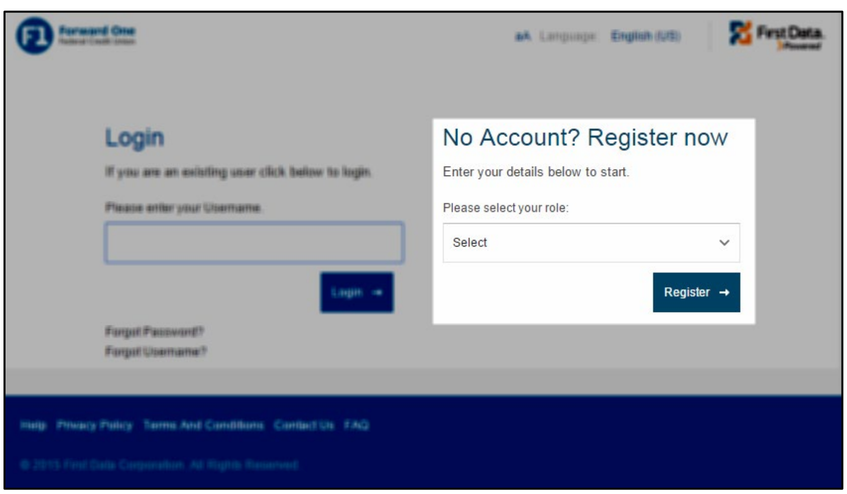
First Time Log In

Once you, the cardholder, receive your card in the mail, you can register your account in 360Control. By registering your card, you may log on to 360Control with a username and password to view your account details.

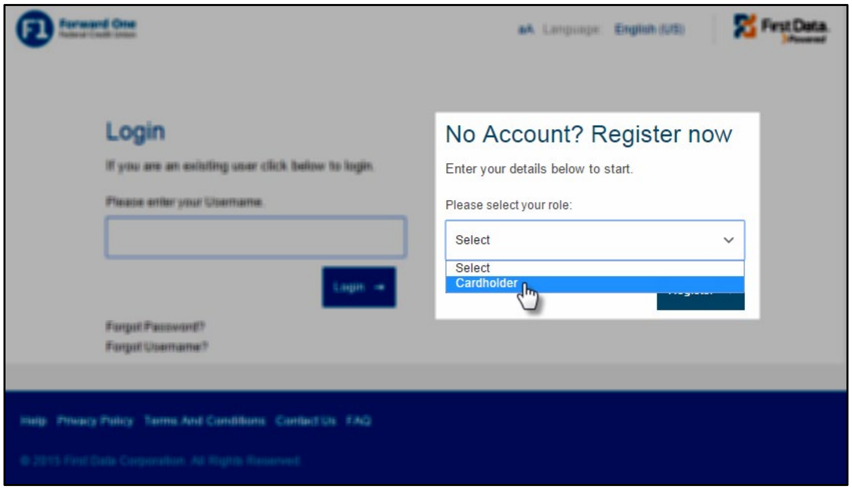
A link or email should have been provided by your Program Administrator, depending on how the back end system is set up. If you have not received a link or email, please reach out to your Program Administrator.

Follow these steps to register your card:

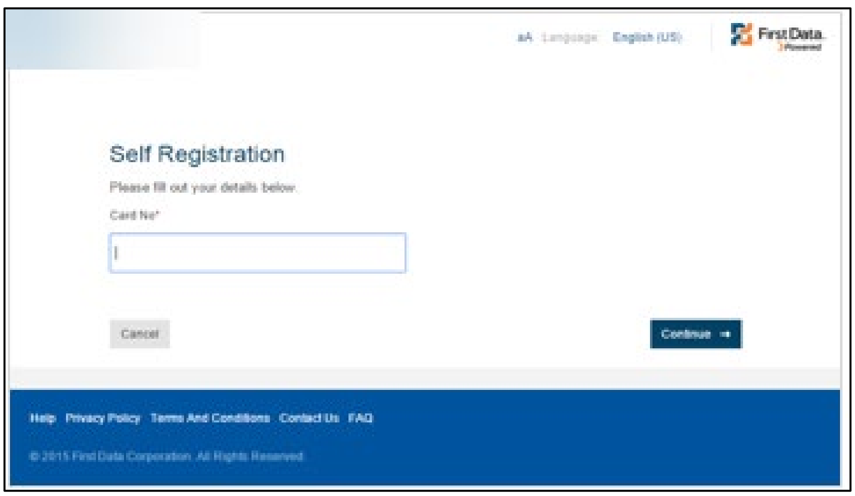
1. Navigate to the *Register Now* section in 360Control.



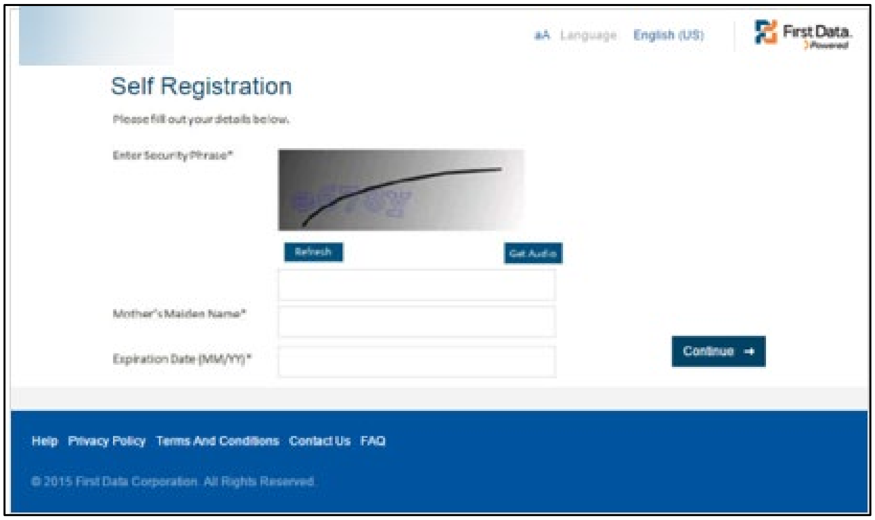
2. Select your **role** from the drop-down menu.
3. Click **Register**.



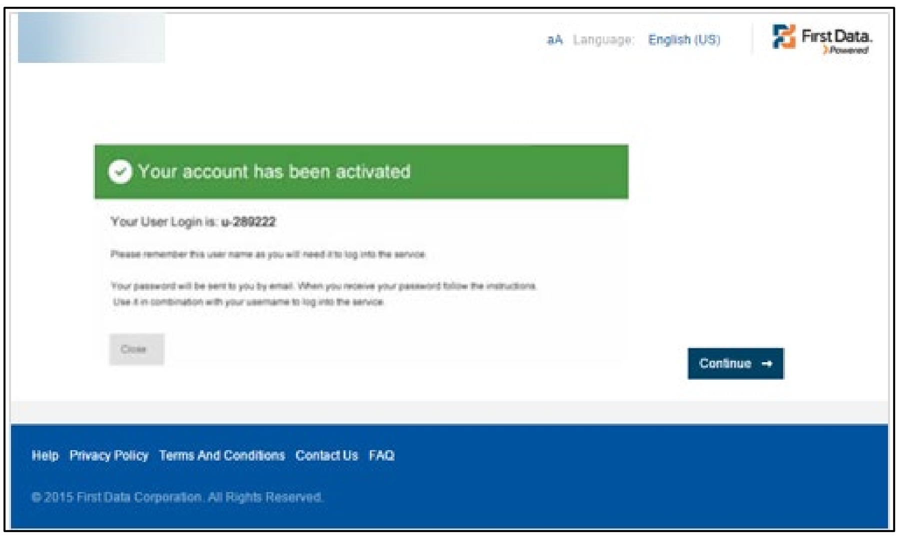
4. Enter the **Card Number** found on the front of your credit card.
5. Click **Continue**.



6. Enter your responses to the security information in the required fields.
   - Security Phrase (CAPTCHA)
   - Work Phone
   - Card Expiration Date
   - Mother's Maiden Name
   - Date of Birth (MM/DD/YYYY)
7. Click **Continue**.



The *Activation Confirmation* or *Registration Failed* screen displays.



The *Activation Confirmation* screen provides the assigned user ID. Take note of the ID for all future access to the system. An email will be sent to you with your temporary password.

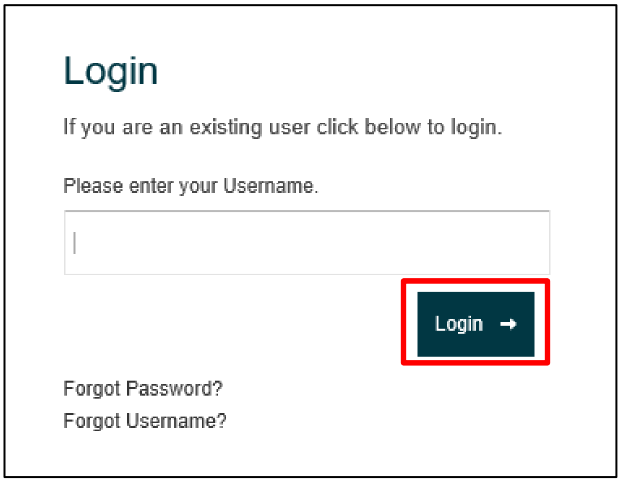
The *Registration Failed* screen prompts you to check your details or click the **Contact Us** link to contact your Program Administrator.

System Login

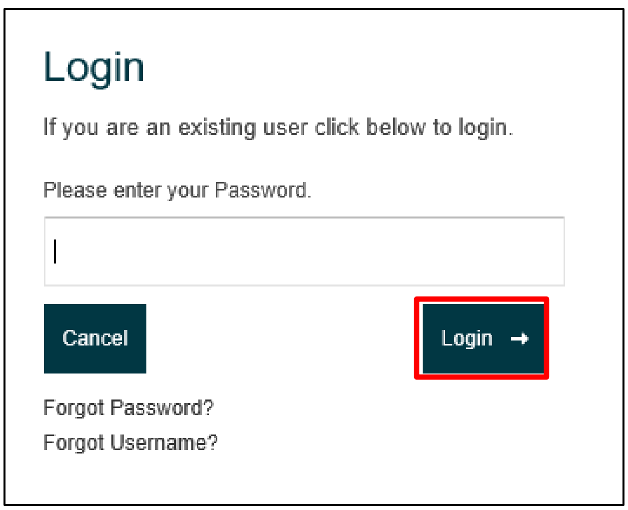
If you have not received a 360Control URL or a user name, please contact your Program Administrator to gain access. Be sure to follow the *First Time Login* instructions.

Follow the steps below to log in to 360Control:

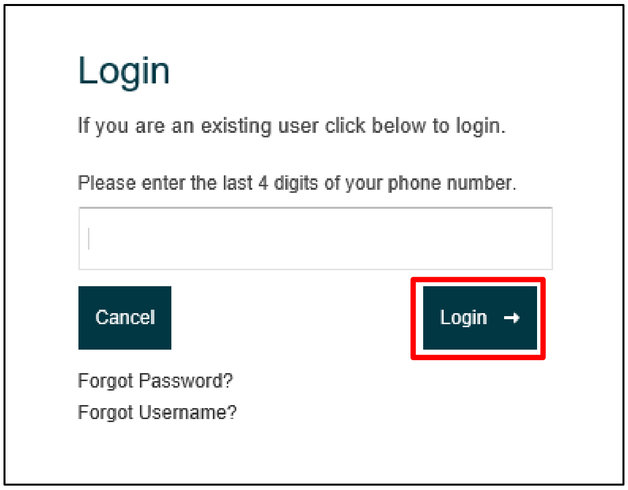
1. Type the **Username** assigned to you by 360Control.
2. Click **Login**.



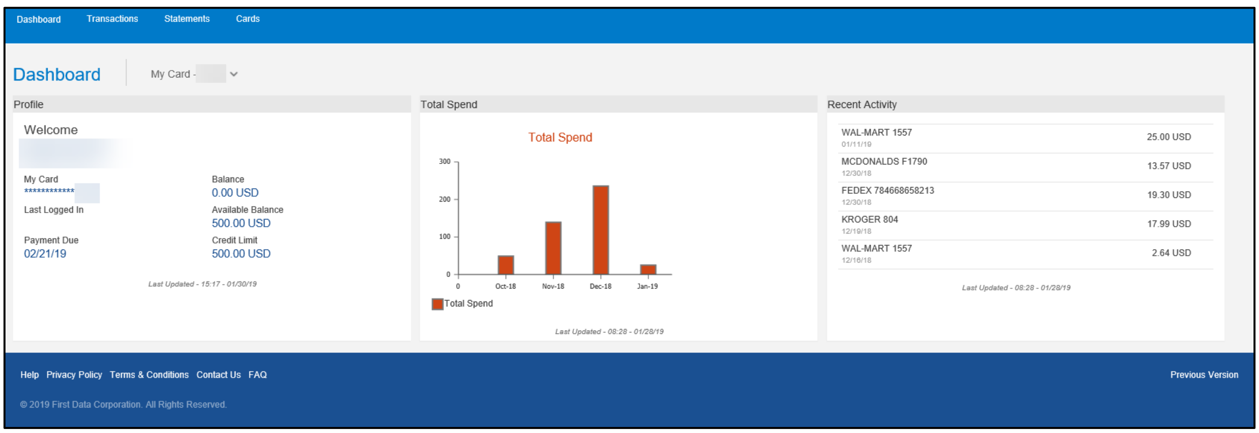
3. Type your **Password**.
4. Click **Login**.



5. Type the **answer** to your security question.
6. Click **Login**.



Your dashboard displays.



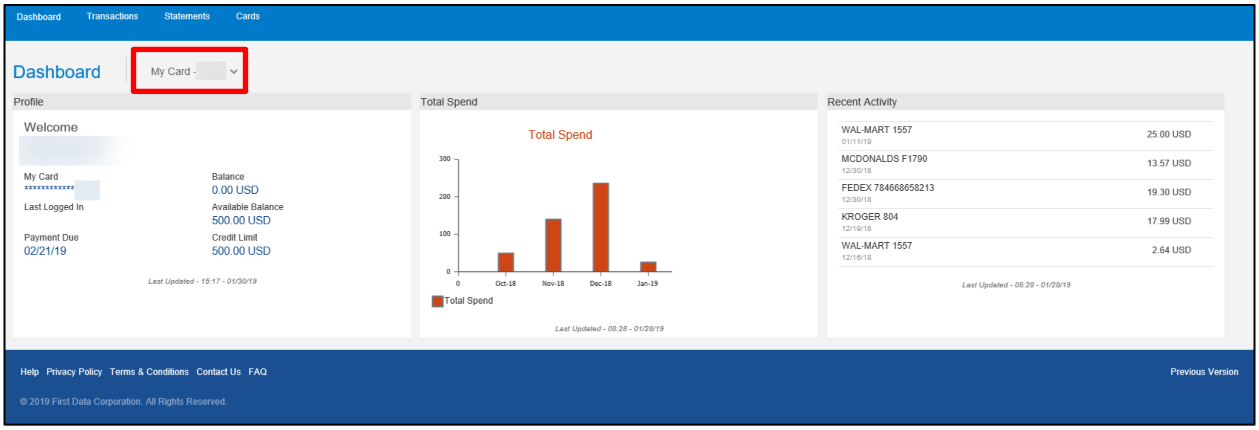
NOTE

If your login information is entered incorrect three consecutive times, your account will be locked out. Contact your 360Control Program Administrator to unlock your account.

Dashboard

The dashboard serves as the homepage. This view provides a high-level view of your spending, quick links to items that may require action, and a review of the card's most recent activity. The dashboard panes that appear depend on the account you are looking at.

If you have multiple accounts, you'll see a dropdown icon next to the last four digits of your card. Click the **drop-down** to reveal the additional cards.



The dashboard contains three widgets:

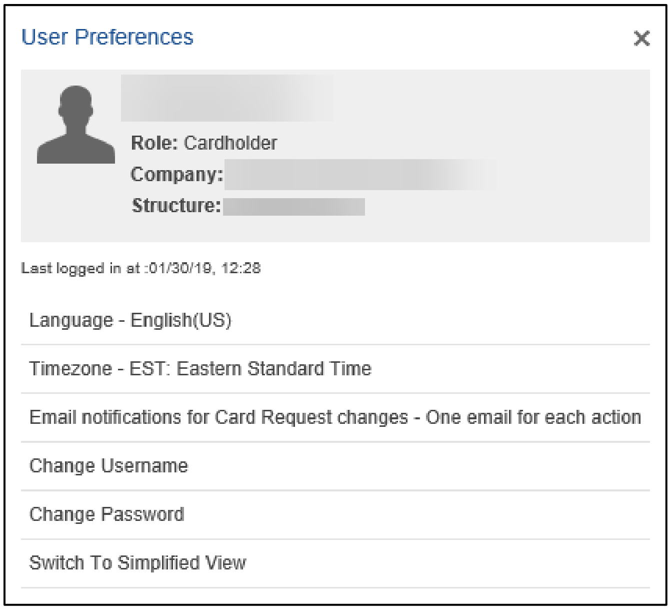
- Profile: Holds information specific to the cardholder.
- Total Spend: Bar graph displaying the total dollar spent each month
- Recent Activity: Recent transactions on the account.

User Preferences

360Control allows you to change language, time zone, email notifications, username and password. Access your user preferences by navigating to the top right corner of the screen and clicking your name.

The *User Preferences* screen provides the ability to change:

- Language
- Time zone
- Email Notifications for Card Request Changes
- Username
- Password
- Switch to Simplified View/Full View



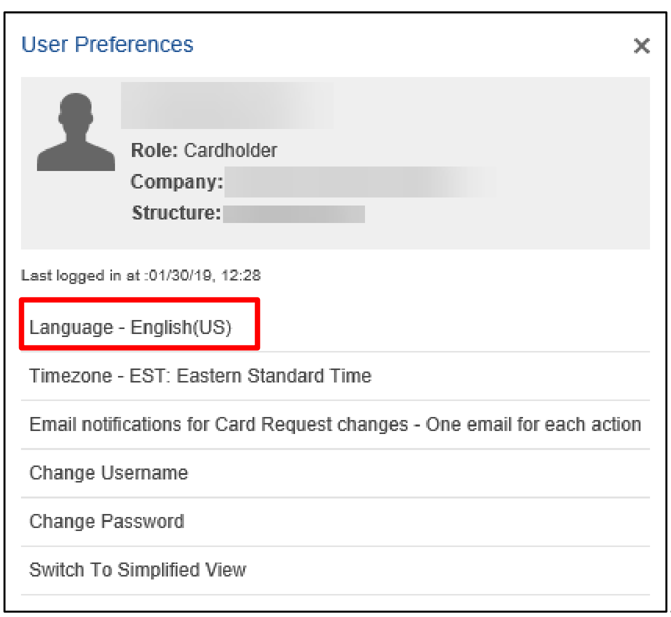
The screen displays your current settings for language, time zone and email notifications for card request changes.

Language

Cardholders can change their language setting to their preferred language.

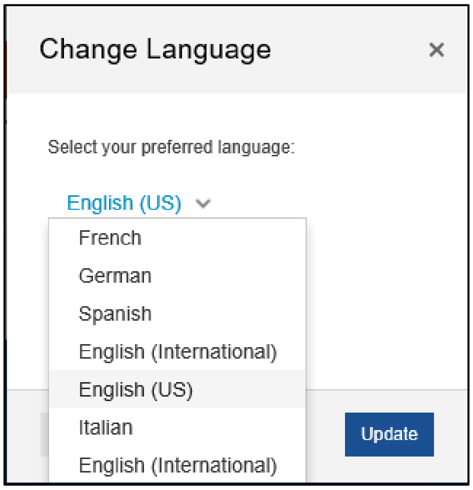
Follow these steps to change your language:

1. Open your *User Preferences*.
2. Click **Language**.



.

The *Change Language* box displays.



3. Select your preferred language.
4. Click **Update**.

A confirmation dialog box appears.

5. Click **OK**.

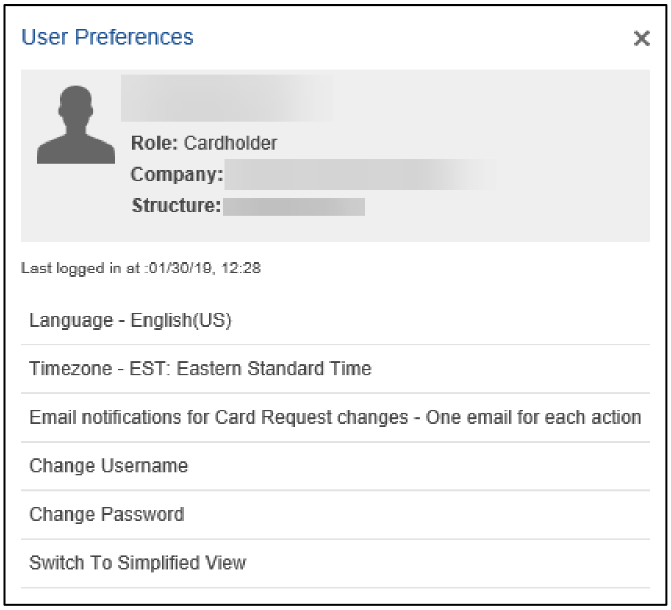
The change takes effect on your next login.

Time Zone

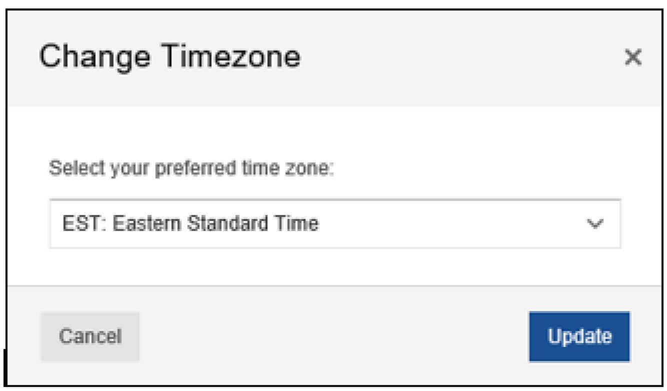
Cardholders can change their time zone settings to a preferred time zone.

Follow these steps to change your time zone:

1. Open *User Preferences*.
2. Click **Timezone**.



The *Change Timezone* box appears.



3. Select your preferred time zone.
4. Click **Update**.

A confirmation dialog box appears.

5. Click **OK**.

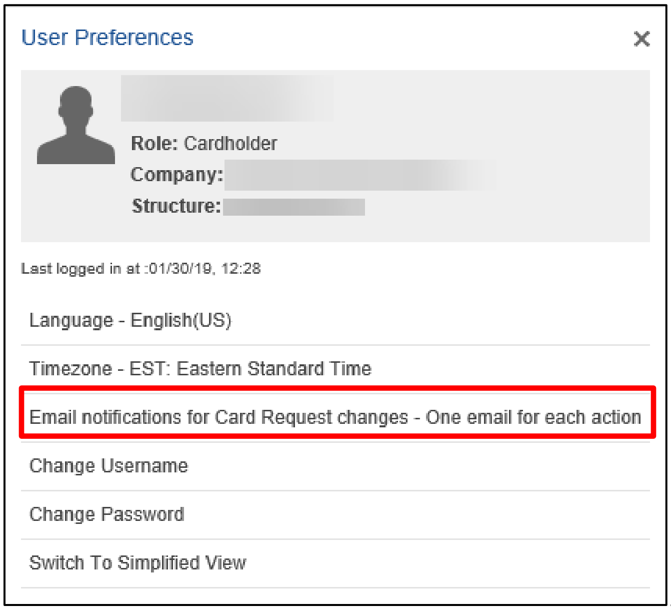
The change takes effect on your next login.

Email Notifications for Card Request Changes

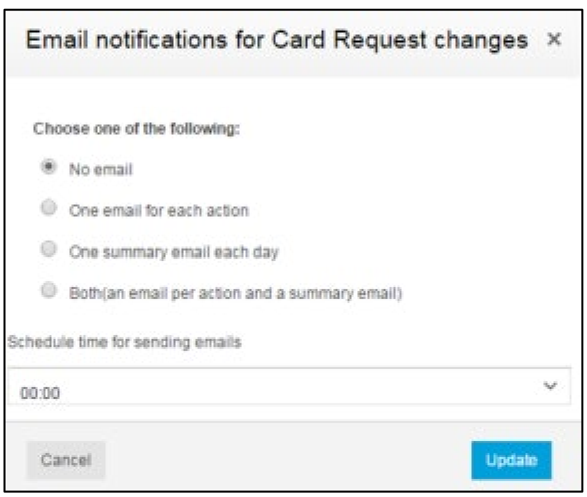
Cardholders can change the frequency of email notification for card request changes.

Follow these steps to change your email preferences:

1. Open your *User Preferences*.
2. Click **Email Notifications for Card Request Changes**.



The *Email Notifications for Card Request Changes* box appears.



3. Select your preferred email notification options.
4. Select the time you'd like to receive emails from the *Schedule time for sending emails* drop-down menu.
5. Click **Update**.

A confirmation dialog box displays.

6. Click **OK**.

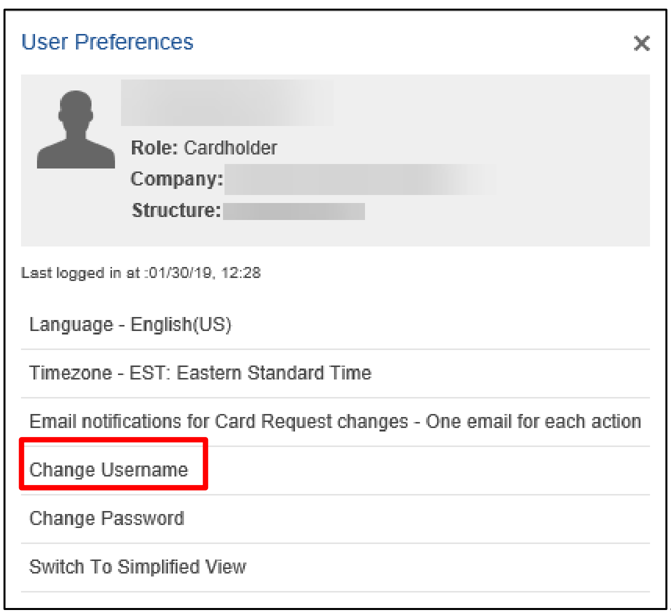
The change takes effect on your next login.

Change Username

A cardholder can change their username at any time. A default username is provided when the cardholder registers their card for the first time. The username can be customized. Usernames must be unique. Users with more commonly found names may find their first choice already in use, such as if Mary Smith attempts to change her username to MSMITH. In this case, she would create a different username.

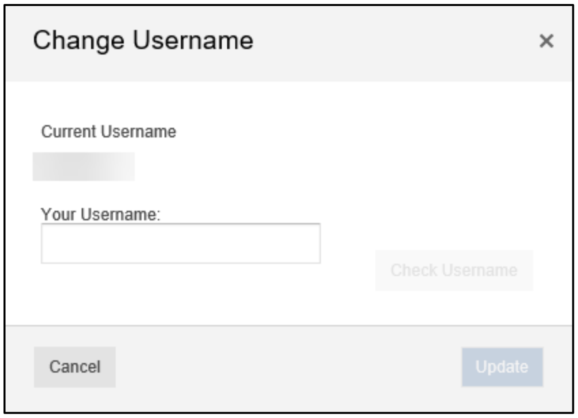
Follow these steps to change your username:

1. Open your *User Preferences*.
2. Click **Change Username**.



.

The *Change Username* box appears.



3. Type a new username in the *Your Username* field.
    - The new username must be at least three characters long and cannot be in use by another system user.
4. Click **Check Username** to make sure the username is available.
5. Click **Update**.

A confirmation box appears.

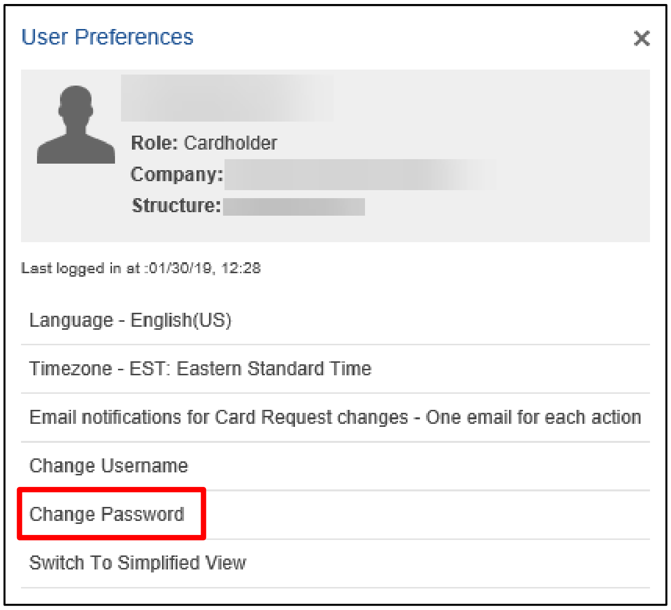
6. Click **OK**.

Change Password

Cardholders can change their password at any time.

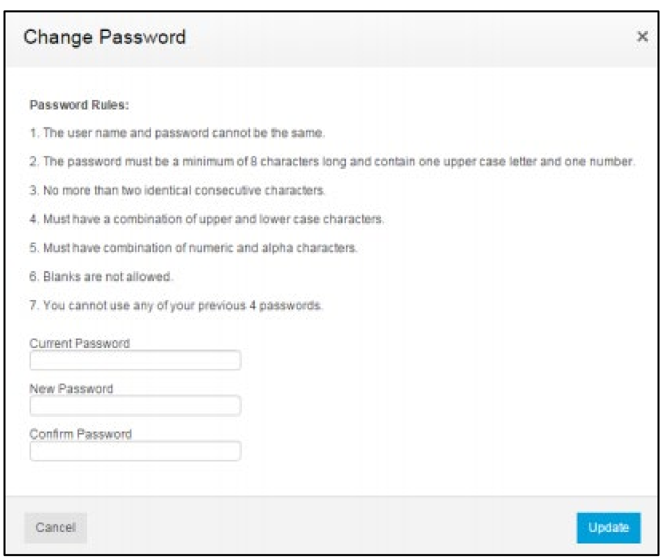
Follow these steps to change your password:

1. Open your *User Preferences*.
2. Click **Change Password**.



The *Change Password* box appears.

3. Review the password requirements.
4. Type your **Current Password**, **New Password** and confirm the new password.
5. Click **Update**.



A confirmation dialog box appears.

6. Click **OK**.

Simplified View or Full View

The simplified view displays a list of transactions for a selected time period. Each transaction listing includes the transaction date, the name of the merchant originating the transaction, and the billing amount.

The full view displays a larger number of transaction details. In this view, you can customize the fields displayed on screen. A filter function enables you to display only transactions meeting specific criteria.

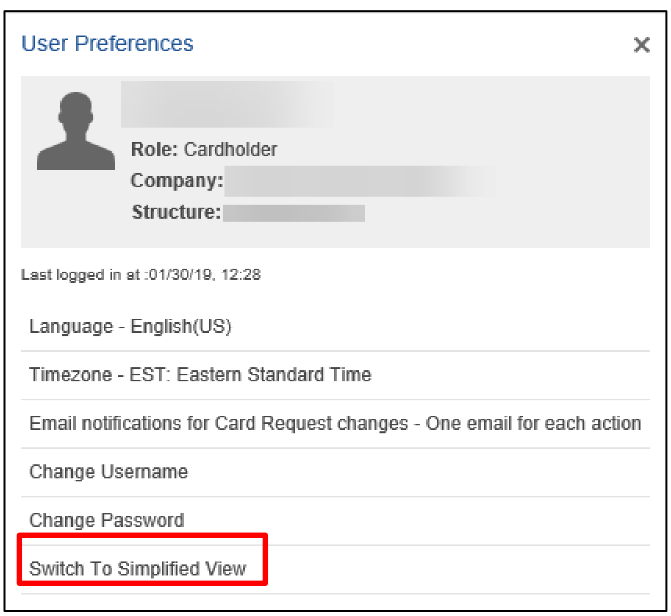
In addition, you can:

- Allocate cost codes to transactions (provided this feature is enabled for your company)
- Split transaction amounts
- Add comments to transactions
- Mark a transaction as disputed

This guide explains the full view first. The explanation for the Simplified View begins on page 45.

Follow these steps to switch between each view:

1. Open your *User Preferences*.
2. Click **Switch to Simplified View**.



The Transactions screen on the Simplified View appears.

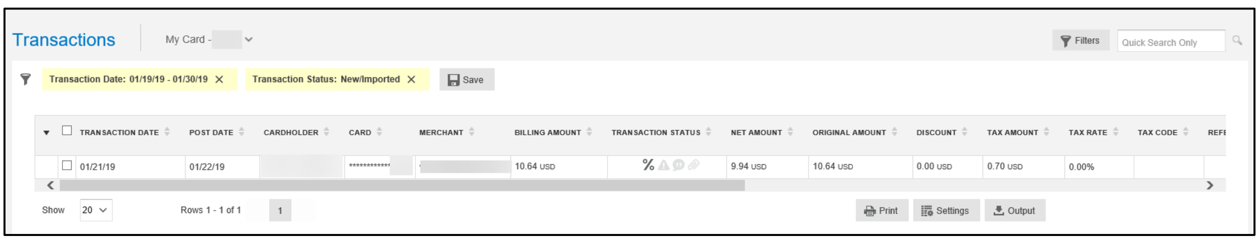
> **NOTE**
> When you switch from the simplified view to the full view, the dashboard displays.

Transactions

The full view displays transactional details found in the simplified view and more. A default filter is set to your current statement to cycle date plus all transaction status types. These default filters cannot be removed but can be changed.

Use this view to:

- Filter transactions
- Customize filters
- Allocate cost codes to transactions (if applicable)



Below are the columns which are available in the transactions screen:

- Transaction Date: Date the transaction took place.
- Post Date: Date the transaction posted to the account.
- Cardholder: The cardholder's name
- Card: The last four digits of the card that was used for that transaction.
- Merchant: Place the transaction took place.
- Billing Amount: The amount of the transaction that has been billed to the account.
- Transaction Status: Icon descriptions of the transactions.

	Indicates when a transaction includes air or train travel.
	Indicates hotel-related transactions
	Indicates car rental transactions
	When highlighted, indicates a receipt is attached.

	When highlighted, indicates a comment has been added to the line item
	When highlighted, indicates that the line item is being disputed
	When highlighted, indicates tax has been applied to the line item

- Net Amount: Dollar and cent amount of the transaction, excluding any assessed tax amount or merchant discount.
- Original Amount: Total dollar and cent amount of the transaction in the original currency.
- Discount: Merchant-provided amount displaying sale.
- Tax Amount: Dollar and cent cost amount
- Tax Rate: Percentage rate of sales tax.
- Reference: Merchant-defined reference number identifying the customer.
- Card Currency: Currency for transaction to the card.
- Transaction Currency: Currency in which the transaction occurred.
- Currency Rate: Currency exchange rate applied to the transaction if occurred in a foreign country.

Each column includes an up and down arrow. The arrow allows you to change the view of the organization of what displays.

> **NOTE**
> There may be additional columns added if the business has defined any Cost Allocation Levels and Codes.

Quick Search

Cardholders have the ability to search for specific transactions within the *Transactions* screen.

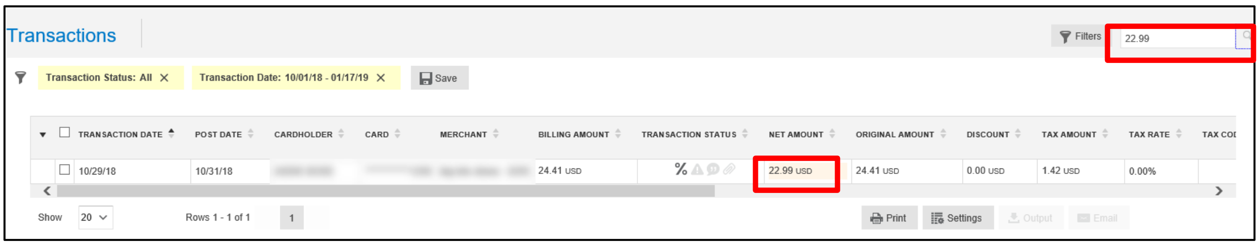
Follow these steps to conduct a Quick Search:

1. Type your search criteria in the **Quick Search Only** box in the top right corner of your screen.

2. Click the **magnifying glass** or press **Enter**.

Your search results display.

In the example below, *22.99* was entered in the Quick Search field. One result populated.



NOTE

The search criteria which can be entered in the Quick Search field can be anything, including the cardholder's name, merchant name and transaction amount. The Quick Search field only displays exact matches to the search criteria entered.

Filters

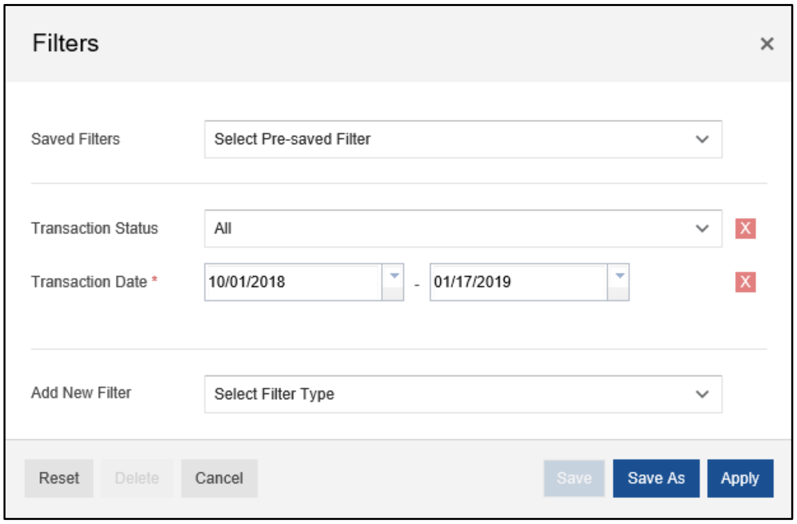
Cardholders can use filters on their transaction search or access previously pre-saved filters through the *Filters* screen.

The default filter is your current statement to cycle date plus all transaction status types.

Follow these steps to add a filter to your transaction search:

1. Click the **Filters** button on the top right corner of your screen.

The *Filters* popup box appears.



2. If you have a previously saved filter and wish to use it, select it from the *Saved Filters* drop-down menu.
3. If you want to filter using a transaction status, select the appropriate status from the **Transaction Status** drop down menu. Options include:
   - Approved
   - Reviewed
   - Disputed
   - New/Imported
   - Exported
   - Unexported
4. If you want to change the date range of the transaction search, either type or select the drop-down menu in the **Transaction Date**.
   - If you select the drop-down menu, a calendar displays and the PA can select the date.
5. If you want to add additional filter fields, select the appropriate status from the **Add New Filter** drop-down menu. Additional options include:
   - Billing Amount
   - Billing Currency
   - Card
   - Cardholder
   - Comments
   - Cost Allocation
   - Cost Allocation Status
   - Country of Origin
   - Entity
   - First Name

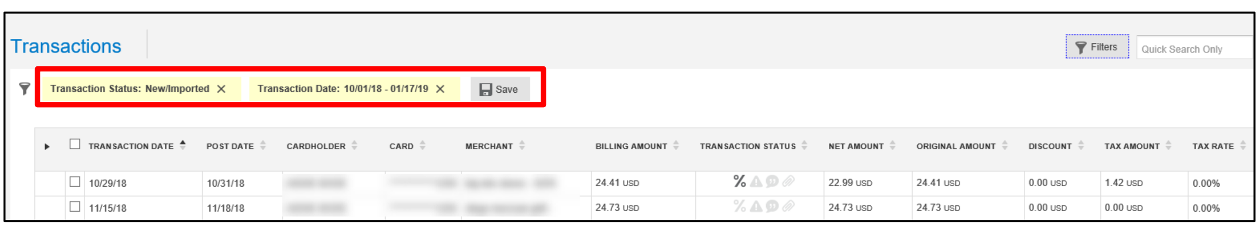
- Last Name
- Level
- MCC Code Desc
- Merchant
- Merchant Identifier
- Original Currency
- Post Date
- Receipted
- Stan Ref
- Tax Code Desc
- Tax Error No./Desc
- Tax Status
- Transaction Type

NOTE

If you want to clear any of the transaction filtering options, click the **Red X** on the corresponding line item.

6. Click **Apply**.

The search results display the transactions with the new applicable filters. The filters which have been added display on the top of the page.

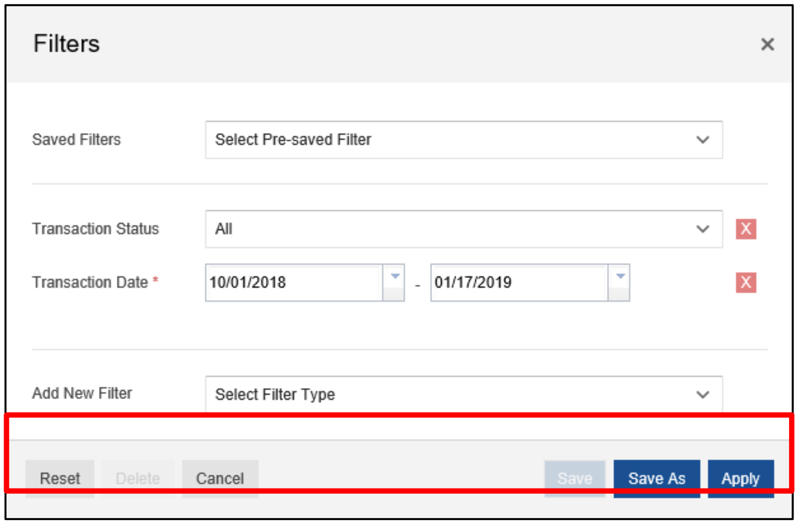


You can click the **X** next to the filter to remove it. The search automatically updates the results removing the previous filter added. You can also click the **Save** icon if you want to save the filter for future use.

There is additional functionality within the *Filters* screen.

- Reset: Removes all filter criteria which has been set.
- Delete: If a pre-saved filter has been selected, a PA can delete it.
- Cancel: Returns the user back to the transactions screen.
- Save: If a pre-saved filter has been selected, the PA can update the search criteria within it.

- Save As: Saves the search criteria to the Saved Filters drop-down menu.
- Apply: Sets the filters to the transaction screen display.



Transaction Details

Each row of the transaction table contains information about the transaction. Depending on the merchant, additional rows, also known as line items, may be passed through. These may include unit cost, quantity, and description of goods. These details require extra lines in the transaction table.

A transaction always has at least one line of information. The line displayed for all transactions is called the top line. It contains the transaction information common to most transactions, such as transaction dates, cardholder name, cardholder account identifier, merchant name, and so on.

Arrow icons in the first column identify transactions with additional lines. The number following this icon is the number of additional lines. Click the arrow icon to display the additional lines.

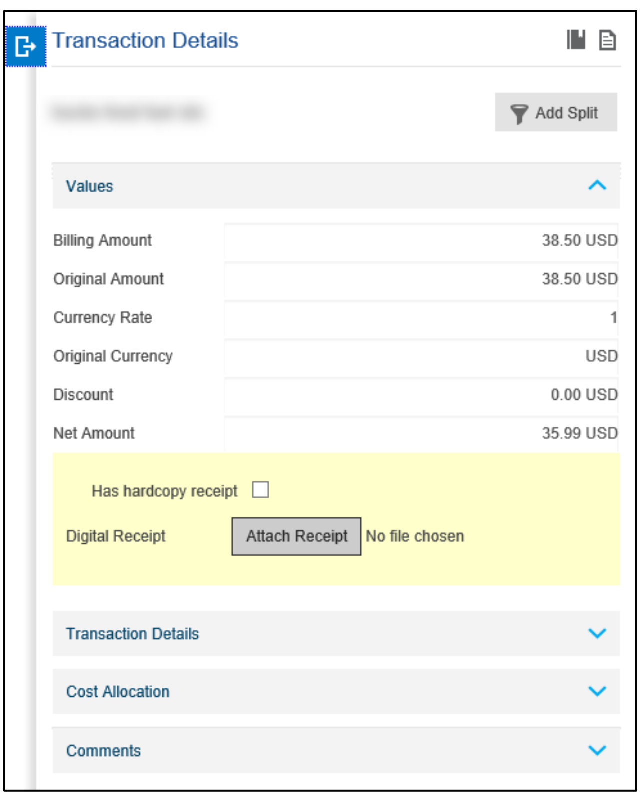
Transaction Details Sidebar

Display additional details about a specific transaction in the *Transaction Details* screen.

The *Transactions Details* sidebar also contains controls that enable you to do the following:

- Display or print all details for the transaction
- Allocate the transaction to a cost code (provided your company uses this feature)
- Split a transaction
- Dispute a transaction or remove a dispute
- Attach a digital transaction receipt
- View transaction details
- Attach a receipt image
- Select Cost Allocation codes

To open the *Transaction Details* sidebar, select the transaction from the main list. The sidebar opens on the right side of the screen.



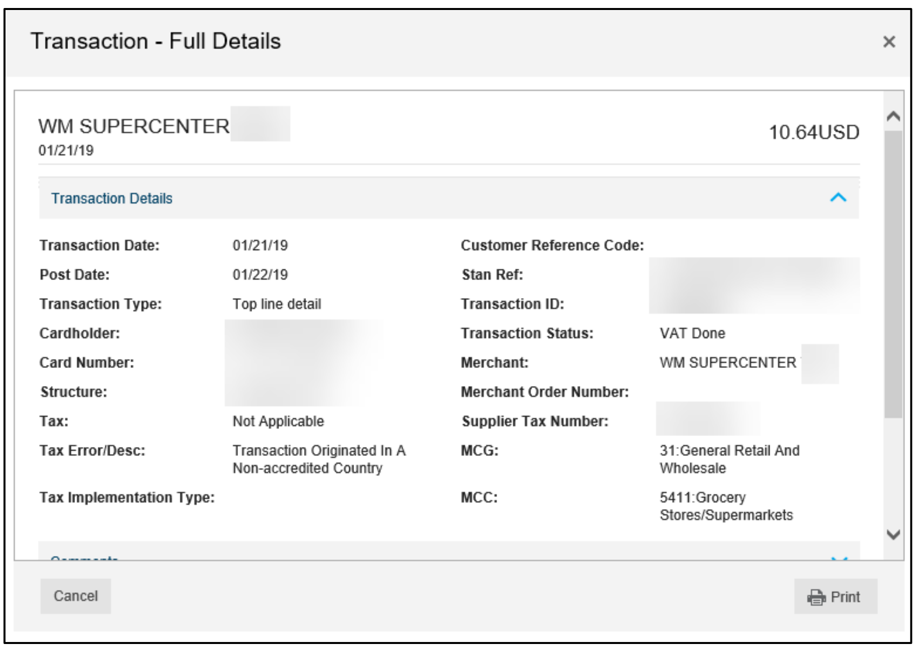
The *Transaction Details* sidebar is broken down into four drawers, which is discussed shortly:

- Values
- Transaction Details
- Cost Allocation
- Comments

Full Details

The *Full Details* icon allows the user to access the transaction's full details. PAs can use the Full Details, if preferred, to view the transaction details. The information in the *Full Details* screen is the same as using each drawer in the sidebar; the information is arranged differently but the same details are shown.

Click the icon and the *Transaction – Full Details* popup appears.



NOTE

You can also print the full details for a specific transaction. Click the **Print** button in this box.

Split Transactions

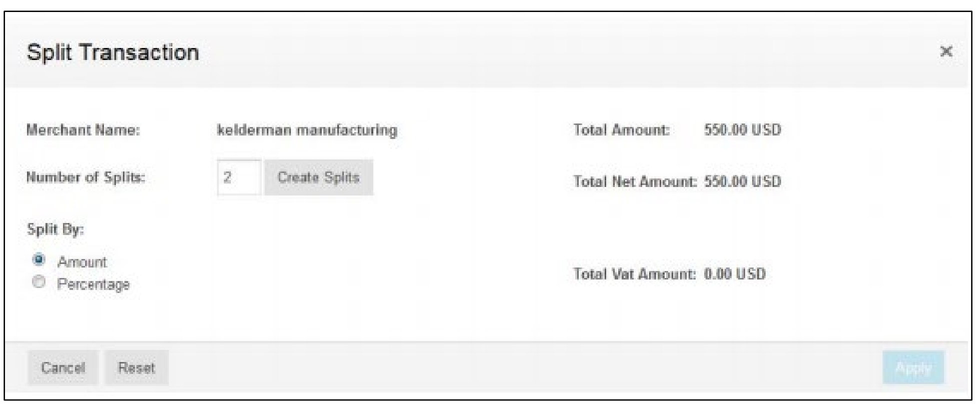
Divide a top line or line item, on the transactions main screen, into multiple line amounts for tax coding and cost coding at a more detailed level by using split transactions. Split lines are treated as additional data. Any type of transaction can be split unless the transaction has been exported or approved. Approved transactions must be unapproved before splitting them. In addition, you cannot dispute a split portion of a transaction.

> **NOTE**
> Some companies do not use the Export and Transaction Approval features.

Follow the steps below to split a transaction:

1. Locate the **transaction** or line item.
2. Display the *Transaction Details* sidebar.
3. Click **Add Split**.

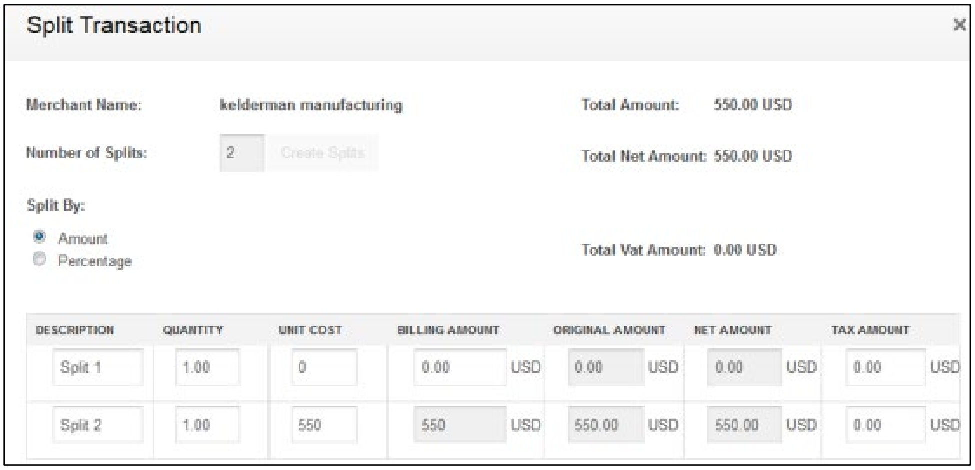
The *Split Transaction* dialog box displays.



4. In the *Number of Splits* box, enter the **number of lines** you want the selected transaction or line item divided.
5. Click one of the **Split By** options:
   - Click **Amount** to enter a specific amount in each split line.
   - Click **Percentage** to divide the transaction amount into percentages of the total amount.

6. Click **Create Splits**.

This displays the appropriate number of rows to the *Split Transaction* dialog box.



The *Description, Quantity, Unit Cost,* and *% Split* fields are filled with default values. You can override the default values by typing over them.

7. Take one of the following actions depending on your selection in the *Split By* section:
   - **Amount** selected: Complete the **Description**, **Quantity**, and **Unit Cost** fields in each row. Complete the **Billing Amount** field in the top row(s).
     - The last row automatically calculates the remaining billing amount.
   - **Percentage** selected: Enter the **percentages** of the total amount in the **% Split** field in each row. Enter percentages as whole numbers, such as 30 and 70, or as fractional percentages, such as 12.5 or 33.33.
     - The percentages adjust so that the total percentage is 100%.
8. Click **Apply** to save the information and split the transaction or line. This displays a confirmation that the split took place.
9. Click **OK** to close the dialog box.

The split transaction immediately displays on the transaction screen.

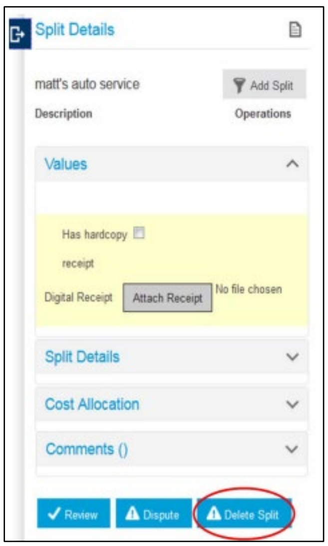
Delete a Split Transaction

Follow these steps to delete a split transaction:

1. Locate the transaction or line item.
2. Display the **Transaction Details** sidebar.

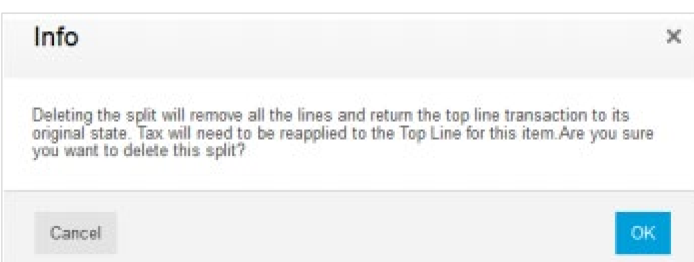
3. Click the **Arrow** icon in the left column to display the split lines.
4. In any of the transaction's split lines, select the **checkbox** to display the *Split Details* sidebar.

5. Scroll to the bottom of the *Split Details* sidebar until the **Delete Split** screen button displays.



6. Click **Delete Split**.

A confirmation dialog box appears.



7. Click **OK** to confirm the deletion.

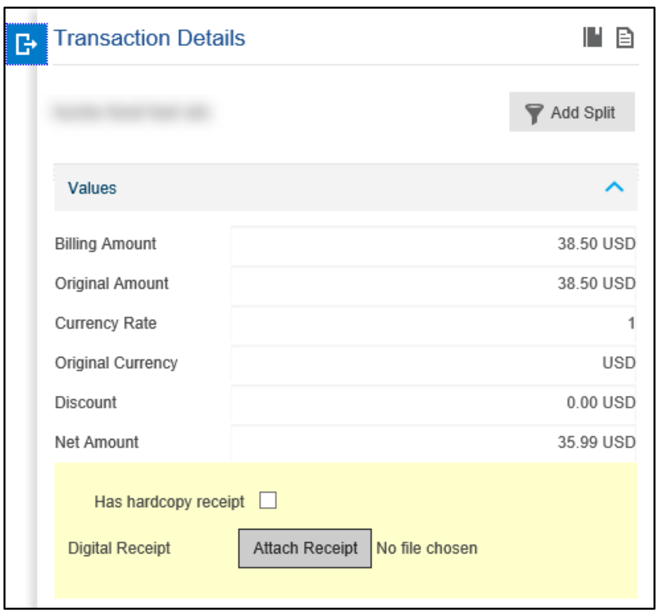
Values

The *Values* drawer provides specific information regarding the transaction amount.

The *Values* drawer holds the following information:

- Billing Amount
- Original Amount
- Currency Rate
- Original Currency
- Discount
- Net Amount
- Attach Receipt

All of the information in the *Values Drawer* is read-only except for **Attach Receipt**.



NOTE
You can click the blue carat icon to minimize each drawer for easier navigation.

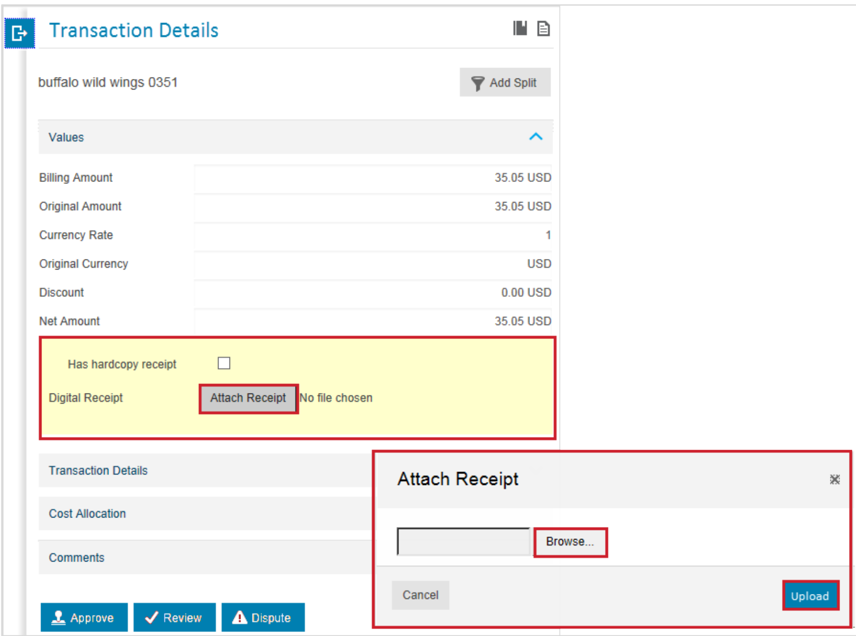
Attach Receipt

You can attach a copy of a receipt to a transaction using the attach receipt function.

Follow these steps to attach a receipt:

1. Select the transaction that you wish to attach the receipt to.
2. Scroll to the yellow section of the Values section in the *Transaction Details* sidebar.

3. Click the **Attach Receipt** button.
4. Click the **Browse** button to navigate to your receipt.
5. Click the **Open** button to attach the receipt to the transaction.
6. Click the **Upload** button to complete the attachment.



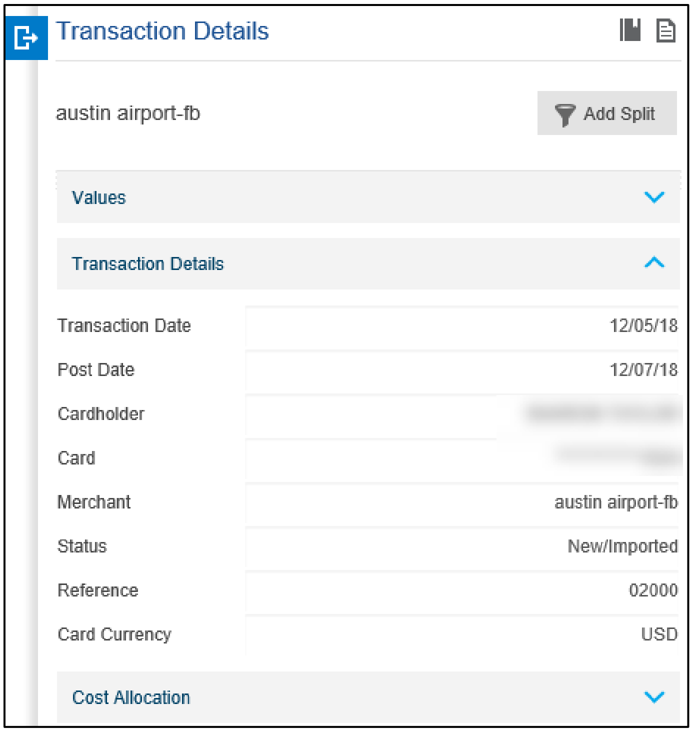
NOTE

Click the *Has hardcopy receipt checkbox* to indicate you have sent a hardcopy of the receipt for review.

Transaction Details

The transaction details is a read-only drawer which provides the following information:

- Transaction Date
- Post Date
- Cardholder
- Card
- Merchant
- Status
- Reference
- Card Currency



Cost Allocation

Cost Allocation allows cardholders to assign their transactions to a specific cost centers or general ledgers.

There are three different types of levels a cardholder could view within the Cost Allocation drawer:

- Free text (Type in the cost allocation)
- Drop-down (Pre-loaded cost allocation types which a cardholder can select from)
- Automation (A code is applied to the transaction based on the merchant type)

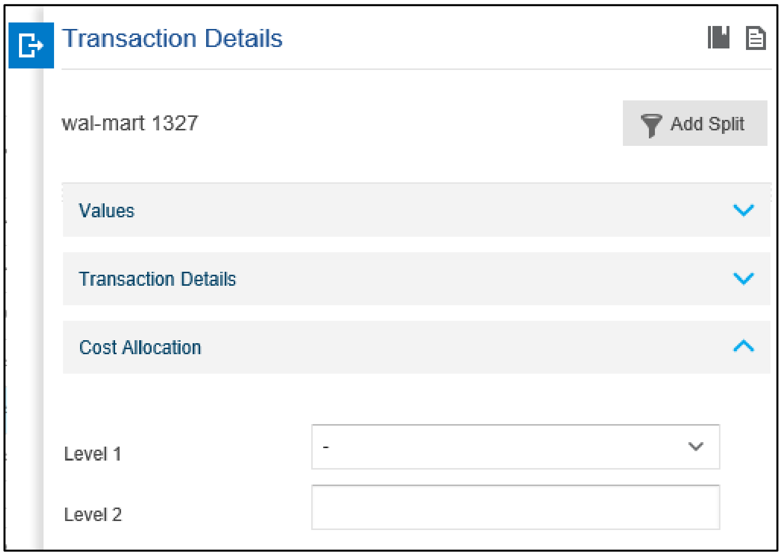
The default cost allocation codes are entered in free text fields, based on levels, which allow users to type in specific codes on the *Transaction* screen. This is useful for codes that cannot be pre-defined or stored in 360Control.

Follow the steps below to add a Cost Allocation Code to a transaction:

1. Select a transaction to open the *Transaction Details* sidebar.
2. Click the carat to open the *Cost Allocation* drawer.
3. Click in one of the text entry fields to activate.

4. Enter your text.
5. Click out of the text entry field to save.

The cost allocation code is automatically assigned.



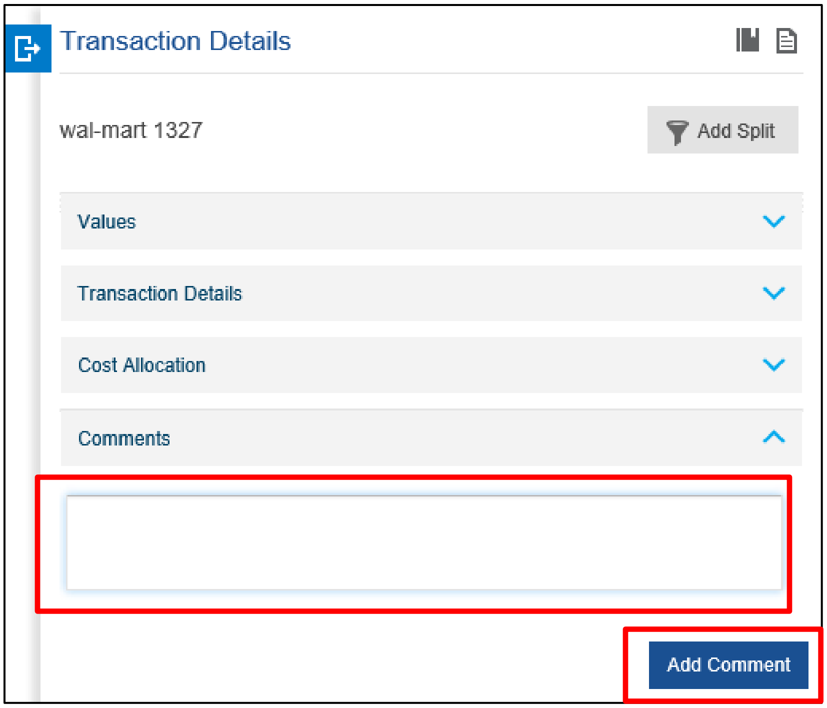
NOTE
If you are set up with the drop-down method, select the appropriate cost allocation code from the drop-down menu. If you are set up with the automated method, the cost allocation code is automatically prefilled. You cannot change the code if it was automatic.

Comments

Comments are usually left for the transaction approval process. If you have a specific request or if the approver has to decline the transaction, you can type a comment to communicate with other parties.

Follow these steps to leave a comment on a transaction:

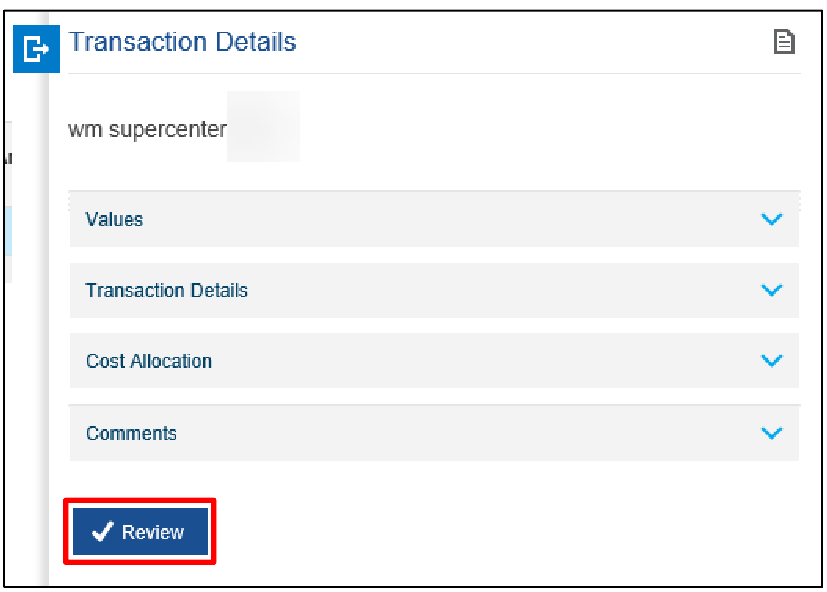
1. Select a transaction to open the *Transaction Details* sidebar.
2. Click the carat to open the *Comments* drawer.
3. Type in your text in the comments box.
4. Click **Add Comment**.



Workflows

There is additional functionality within the *Transaction Details* sidebar located at the bottom of the screen.

This functionality includes the **Review** button.



Review

The **Review** button is the next step you take when you have completed adding your transaction details, such as assigning cost allocation codes and uploading receipts. The review function allows the cardholder to indicate the transaction is ready for approval.

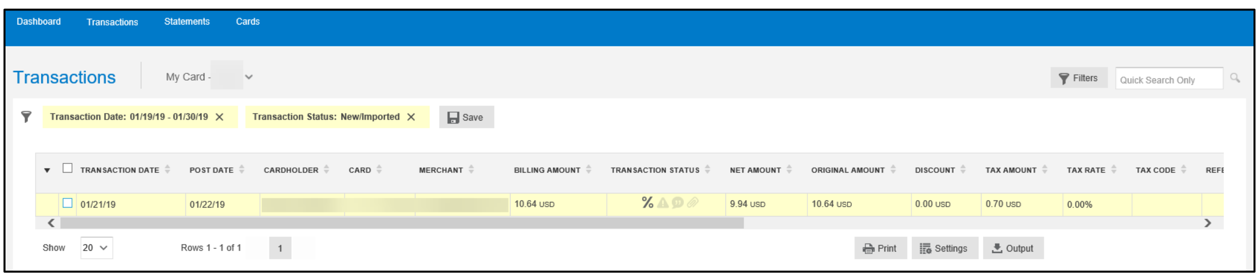
Click the **Review** button once the transaction is ready to be sent for approval.

Additional Functionality

At the bottom of the *Transactions* screen, additional features are available to the user.

These features include:

- Print
- Settings
- Output



Print

Cardholders can print the transactions screen by clicking the **Print** button located at the bottom of the screen. This is not to be used to print a statement. To print a statement, refer to the Statement section of this guide.

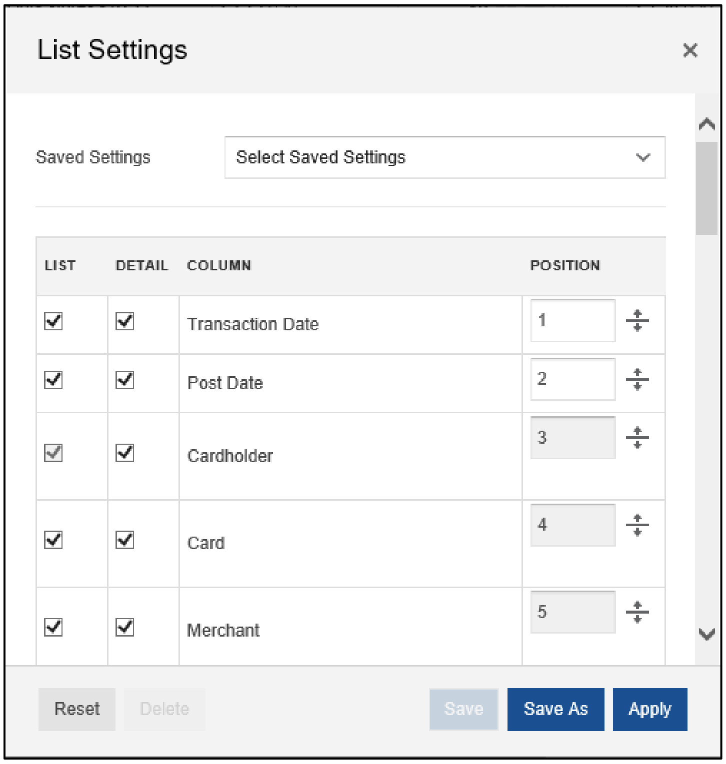
Settings

Users can change or reorganize the order of the columns available on the *Transactions* screen. There may be information that is not pertinent to the business and users may wish to not see the columns.

Follow these steps to change or reorganize the order:

1. Click the **Settings** button at the bottom of the screen.

The *List Settings* screen displays.



2. Click the checkbox(es) under the *List* and/or *Detail* columns to add or remove the column from the *Transaction* screen.
3. Click in the *Position* column and assign the columns in numerical order that you wish to display.
4. Click **Apply**.

The changes apply immediately to the *Transactions* screen.

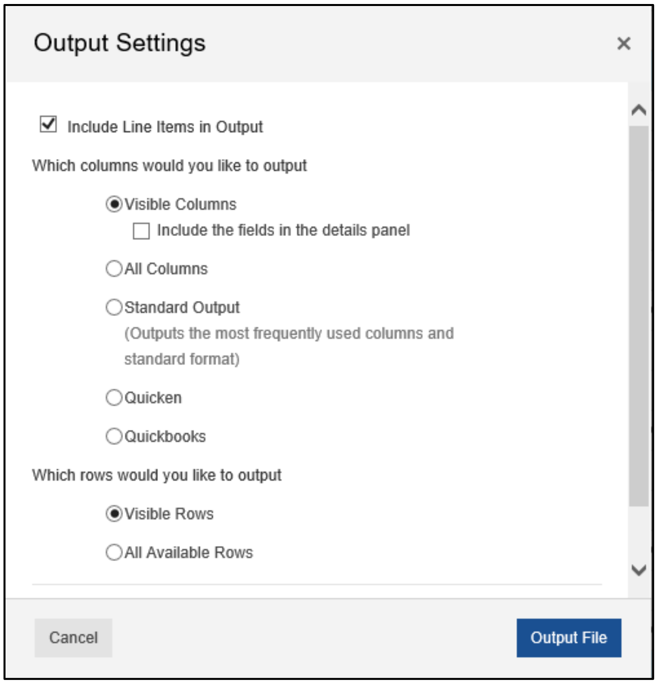
Output

Data from 360Control screens is exportable in a number of file formats.

Follow these steps to create an exportable file:

1. Click the **Output** button at the bottom of the *Transactions* screen.

The *Output Settings* dialog box displays.



There are several settings from which you can select:

- **Visible Columns (default):** Only columns in the current view are exported. If you have hidden columns from the view, they will not be exported.
- **All Columns:** All columns, including any hidden columns, are exported in either comma separated values (CSV) format or Microsoft® Excel.
- **Standard Output:** This option includes a default set of the most commonly used columns in Excel format.
- **Quicken:** This option exports columns required for use with Intuit® Quicken® software. You must have an Intuit ID and contract in place to use this output option.
- **QuickBooks:** This option exports columns required for use with Intuit QuickBooks® software. You must have an Intuit ID and contract in place to use this output option.

You can also choose the file format to export to. Available default options include:

- Excel
- CSV

The format may vary if the setting selected is Quicken or QuickBooks.

2. Click **Output File**.

A popup box displays indicating if the user wants to save the file or open the file.

Statements

The 360Control **Statement/eStatement** screen enables you to view transactions by statement cycle period. The statement view may vary based on whether your version of 360Control includes eMessenger.

eMessenger is an optional module that allows you to view the following:

- Manage eStatement preferences
- Change Delivery Method (Paper vs Electronic)
- View List of PDF statements to download

With eMessenger
The first time the user accesses the statement screen, a popup directs them to enroll in their statement delivery method: paper or electronic. Once enrolled, the regulated monthly eStatement is available for download. By default, the system retains 24 months of historical eStatements.

The default storage period is three months, but a longer amount can be chosen during implementation.

Without eMessenger
Without eMessenger, users view the standard statement page, which allows them to select a date range and view the transactions for that period. Statements cannot be downloaded.

The default storage is a 12 month rolling cycle period without eMessenger.

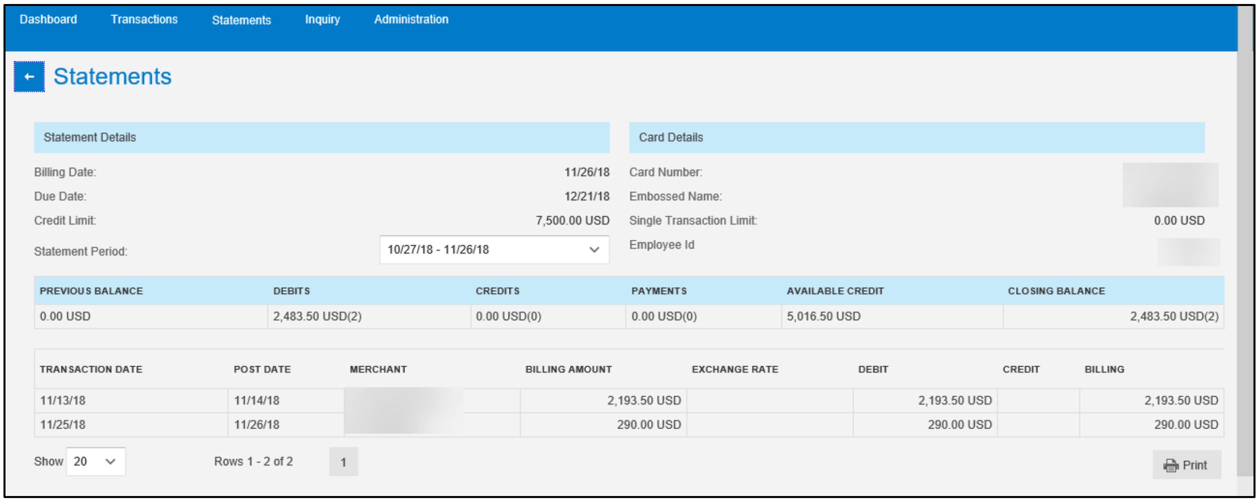
View/Print Statements

Follow these steps to access current and historical statements:

1. Click the **Statements** tab.

If you are set up with eMessenger, move to the eMessenger section within the Statement section of this guide. If not, continue below.

The *Statement* screen displays.



This *Statement* screen contains the following information:

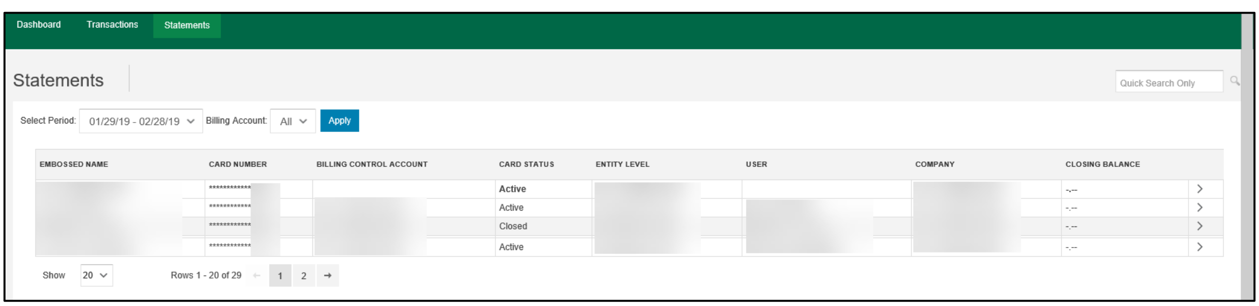
- Statement Details
- Card Details
- Transactions for that statement cycle

To download a statement, click the **Print** button to generate a PDF that you can save to your PC. When downloading a statement, this is not a regulated card statement. This is simply a PDF document of the transactions referenced on the screen.

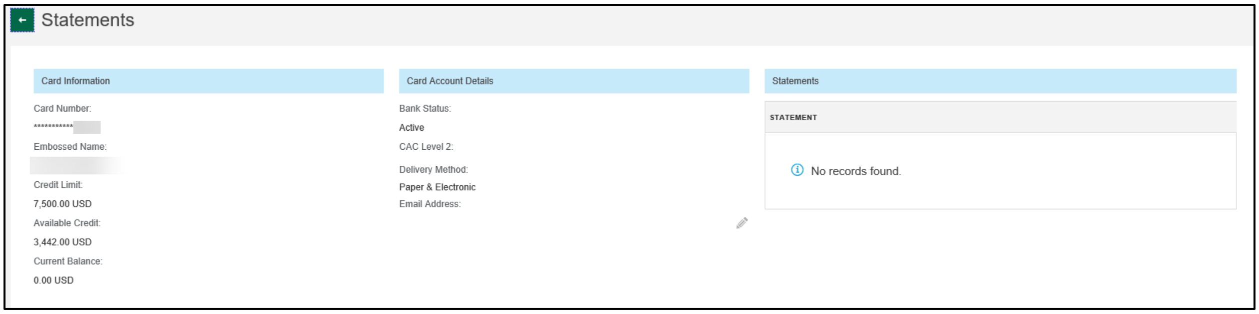
Follow these steps if you have eMessenger set up:

1. Click the **Statements** tab.

The **Statement** screen displays.



2. Select a date from the **Select Period** drop-down menu.
3. Click the carat on the right column to expand the Statement Details.

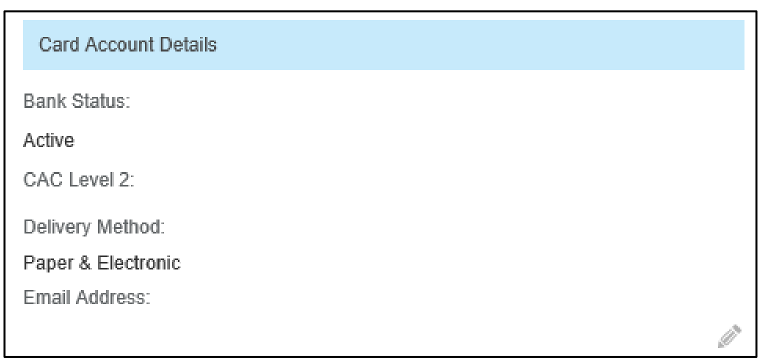


The *Statement Details* screen displays the following:

- Card Information: Read-only
  - Card Number
  - Embossed Name
  - Credit Limit
  - Available Credit
  - Current Balance
- Card Account Details
  - Bank Status
  - Cost Allocation Level
  - Delivery Method
  - Email Address
- Statements: List of eStatements (if enrolled)

Follow these steps to change the delivery method:

1. Click the **pencil** icon under the *Card Account Details* column.

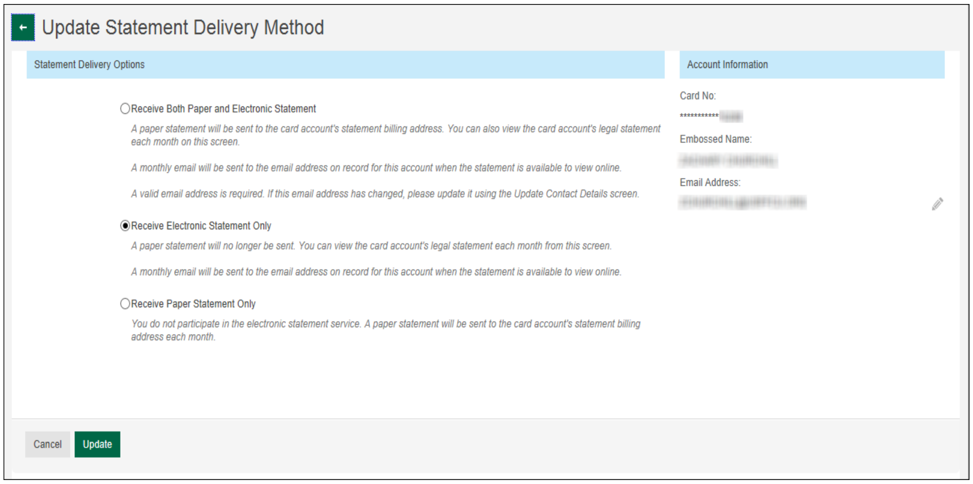


The *Update Statement Delivery Method* screen displays.

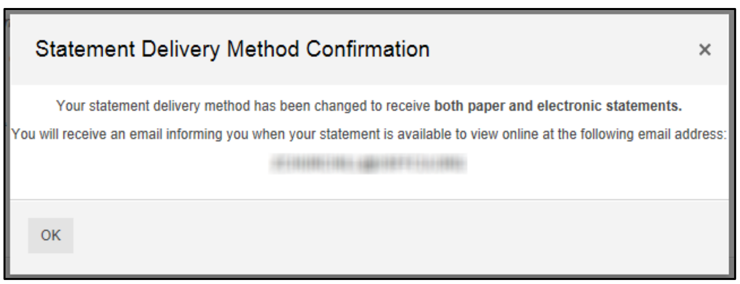
2. Select the radio button next to the delivery method you want to choose. The options for delivery method are:
   - Both paper and electronic

- Electronic only
- Paper only

3. Click **Update**.

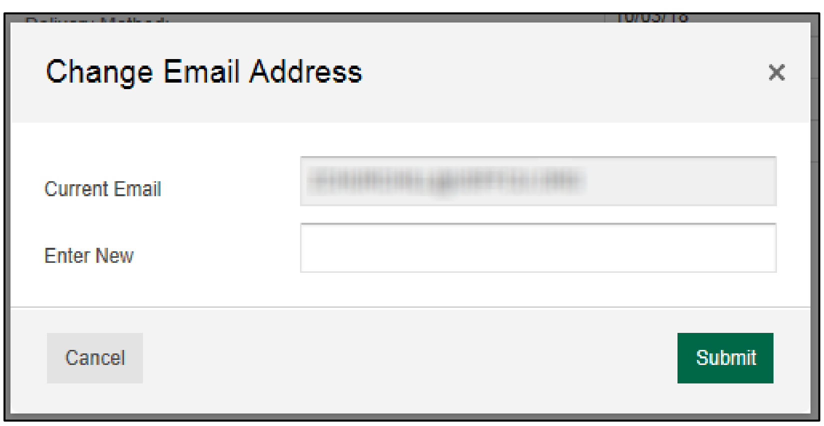


A confirmation dialog box displays.



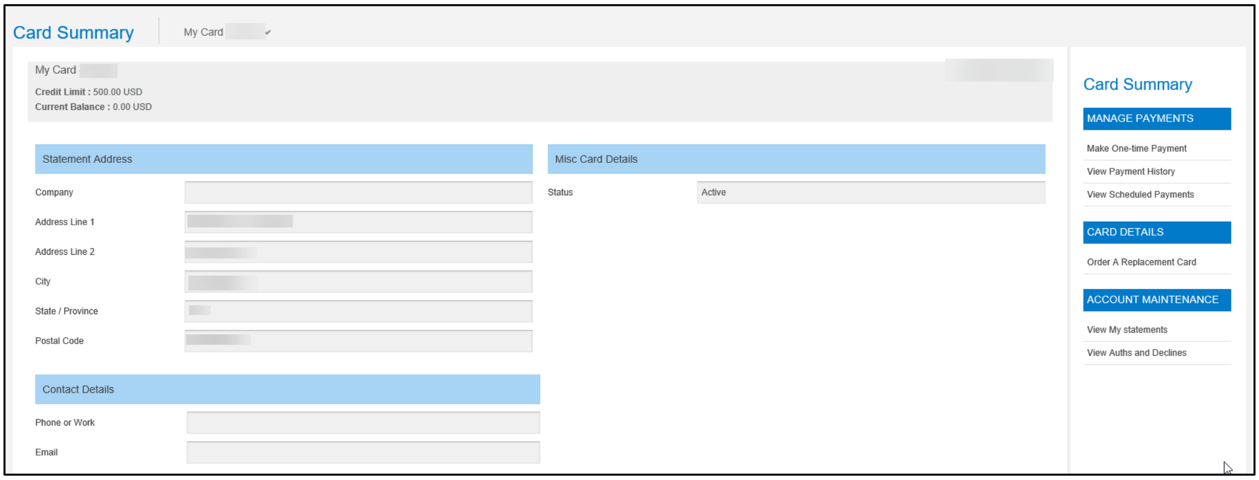
NOTE

You must have an email address on file in order to sign up for the electronic statements. If you do not have an email address on file, the system prompts you to enter one.



Cards

The *Card Summary* screen provides the cardholder the ability to view their card details, as well as the ability to manage payments, card details and account maintenance.

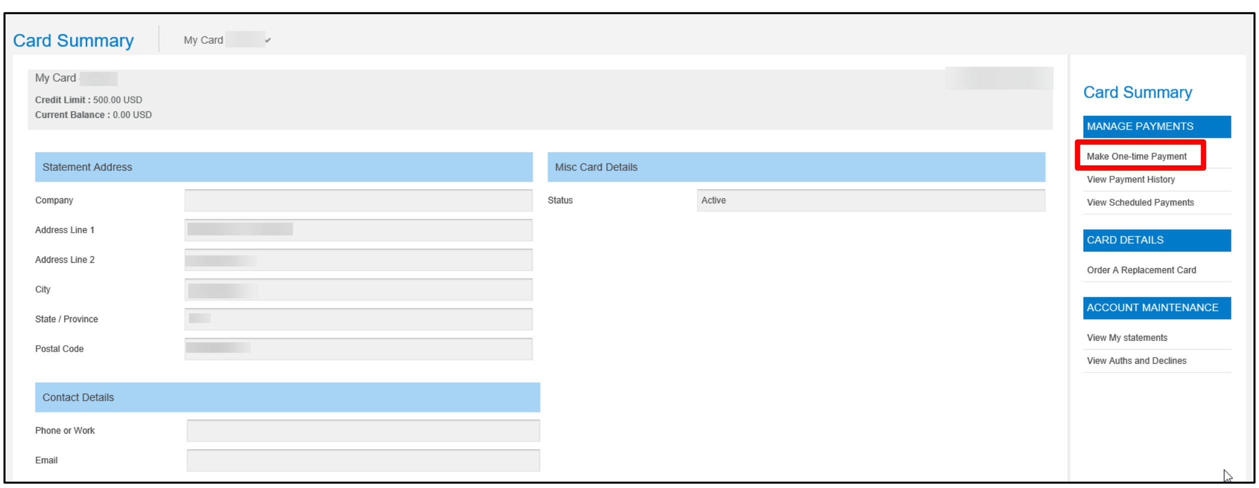


Make One-Time Payment

Depending on how your account is set up, cardholders can make a one-time payment to their card. Most times, the business makes payments on behalf of the cardholder. Be sure to follow your company's policies before making payments to an account.

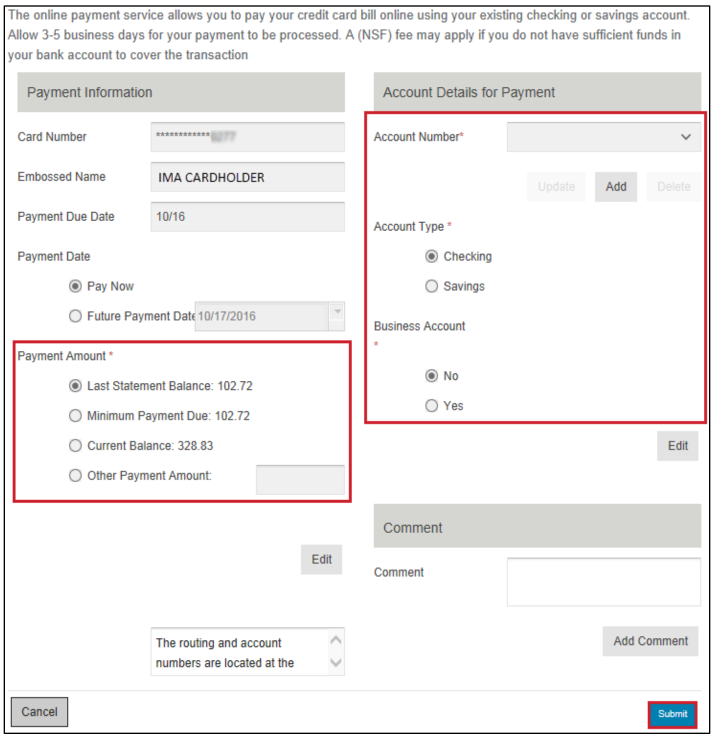
Follow these steps to make a one-time payment:

1. Click the **Cards** tab.
2. Click **Make One-Time Payment** on the right side of the screen.



The *One-Time Payment* popup appears.

3. Select or enter a payment amount.
4. Choose the **Account Type** (checking or savings) and indicate whether this is a business account.
5. Enter the Routing Number, Account Number and confirm the account number.
6. Click the **Submit** button.

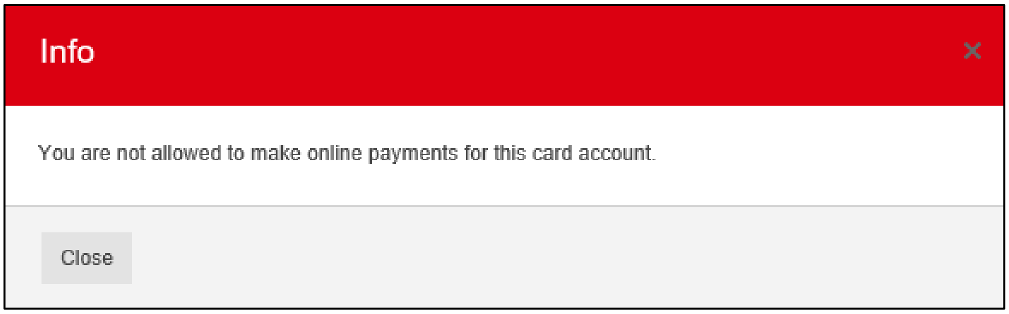


NOTE

An error message displays if the routing number is invalid.

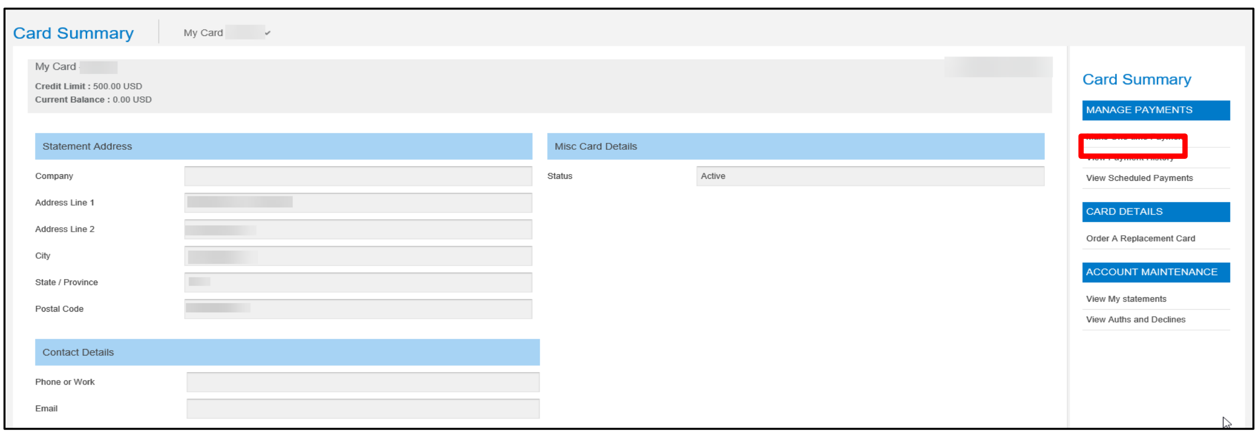
After you click the **Submit** button, a window appears that allows you to review the payment details and edit them if necessary before submitting the payment. If all the details are correct, click the **Submit** button to approve the payment. 360Control automatically sends the requestor an email notification that the payment was processed.

If you are not set up to make payments on your account, you'll receive the following error message.

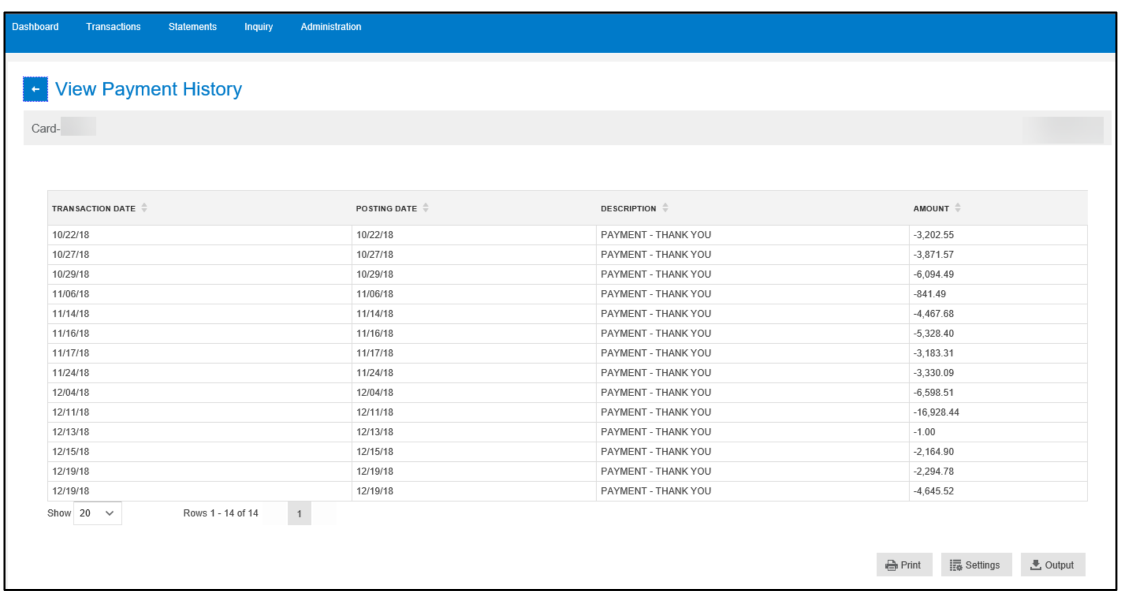


View Payment History

If you are set up to make a one-time payment on your account, you will be able to view payment history. Click **View Payment History** to see when payments were made on your account.



The *View Payment History* screen displays.



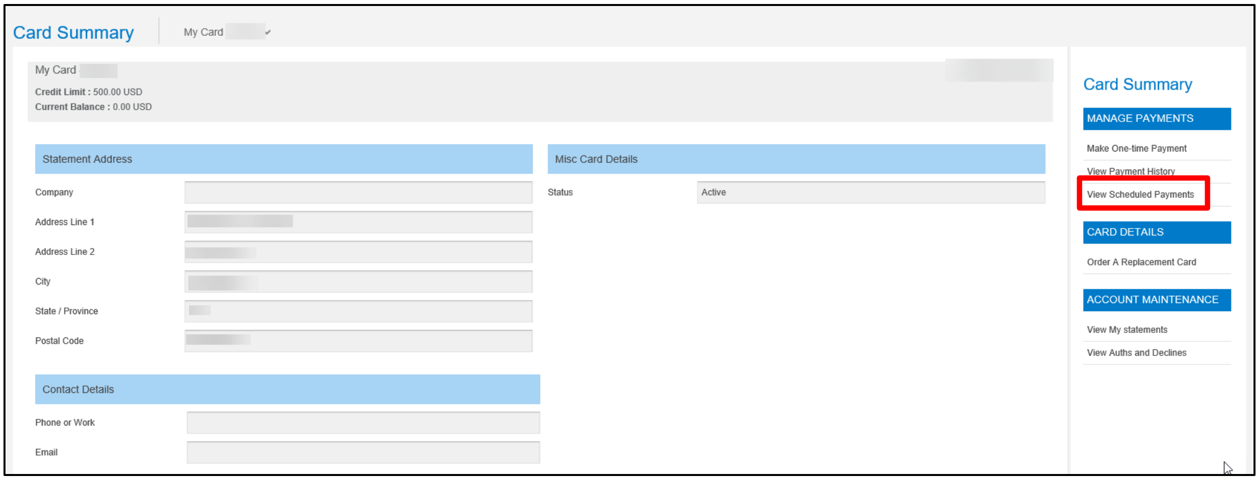
TRANSACTION DATE	POSTING DATE	DESCRIPTION	AMOUNT
10/22/18	10/22/18	PAYMENT - THANK YOU	-3,202.55
10/27/18	10/27/18	PAYMENT - THANK YOU	-3,871.57
10/29/18	10/29/18	PAYMENT - THANK YOU	-6,094.49
11/06/18	11/06/18	PAYMENT - THANK YOU	-841.49
11/14/18	11/14/18	PAYMENT - THANK YOU	-4,467.68
11/16/18	11/16/18	PAYMENT - THANK YOU	-5,328.40
11/17/18	11/17/18	PAYMENT - THANK YOU	-3,183.31
11/24/18	11/24/18	PAYMENT - THANK YOU	-3,330.09
12/04/18	12/04/18	PAYMENT - THANK YOU	-6,598.51
12/11/18	12/11/18	PAYMENT - THANK YOU	-16,928.44
12/13/18	12/13/18	PAYMENT - THANK YOU	-1.00
12/15/18	12/15/18	PAYMENT - THANK YOU	-2,164.90
12/19/18	12/19/18	PAYMENT - THANK YOU	-2,294.78
12/19/18	12/19/18	PAYMENT - THANK YOU	-4,645.52

View Scheduled Payments

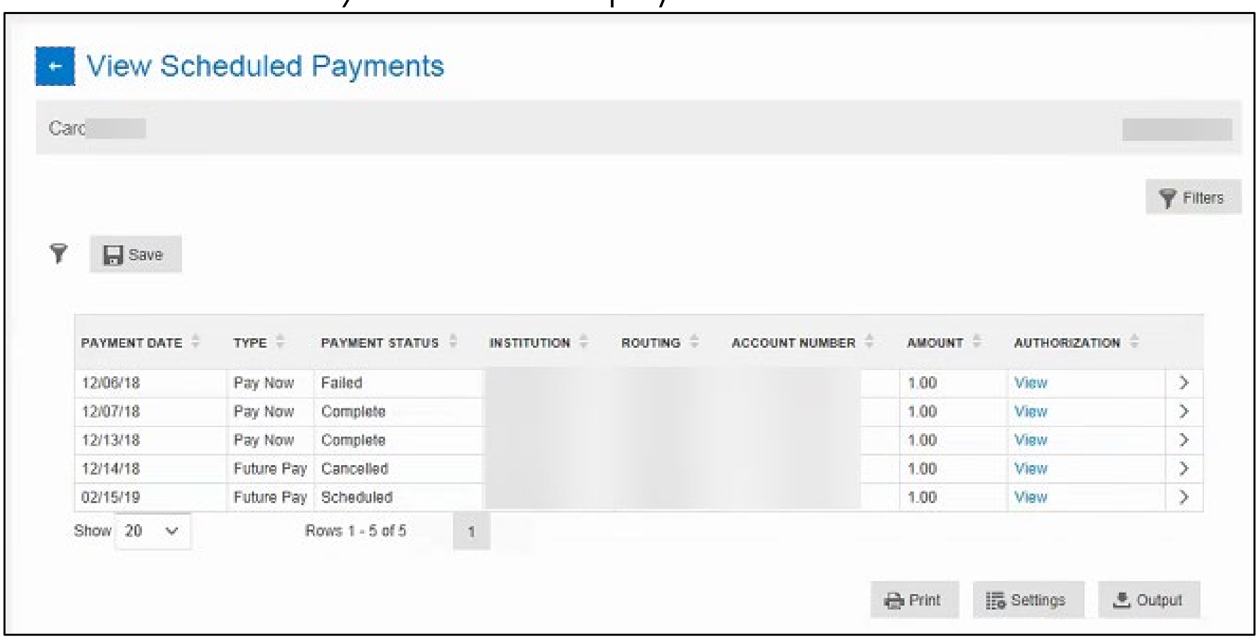
If you are set up to make a one-time payment on your account, you will be able to view scheduled payments.

Follow these steps to view scheduled payments:

1. Click **View Scheduled Payments** to see when payments were made on your account.



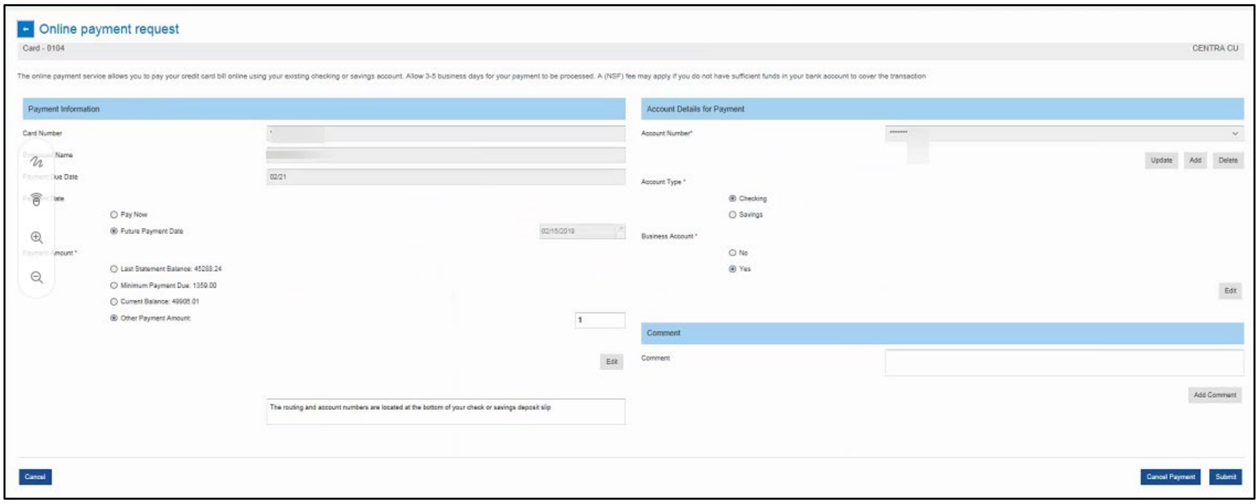
The *View Scheduled Payments* screen displays.



If a payment has the payment status *Scheduled*, it can be edited or cancelled.

2. To cancel or edit the payment, click the carat in the far right column.

The *Online Payment Request* screen displays.



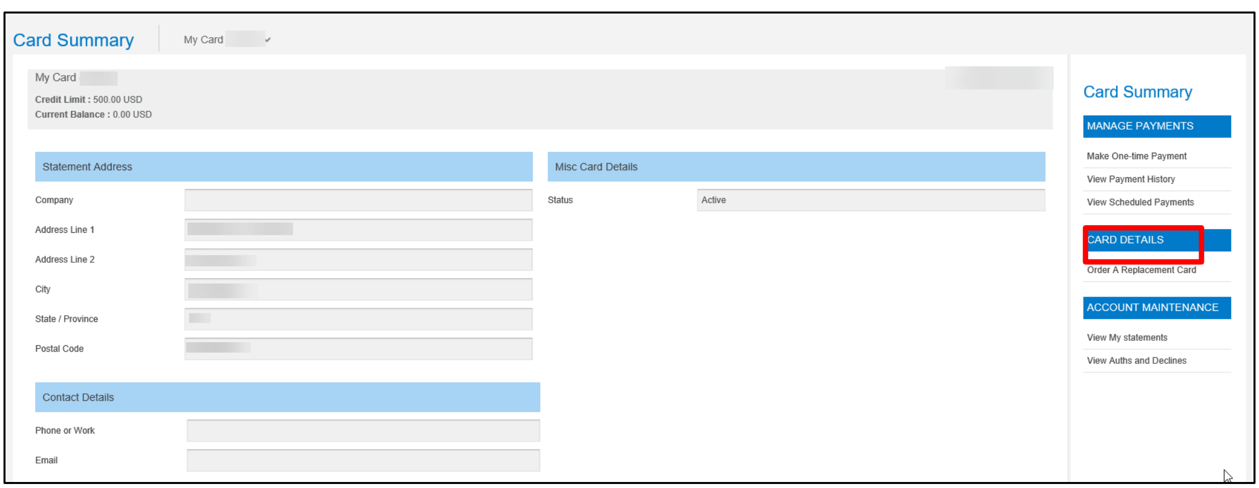
3. To edit, click the **Edit** button in the left column. To cancel, click the **Cancel Payment** in the bottom right column.

Order a Replacement Card

You can order a new card if your existing card needs to be replaced, in such cases as the magstripe no longer works or the card is damaged. If the card is lost, stolen, needs suspension, or needs to be closed, please contact your Program Administrator.

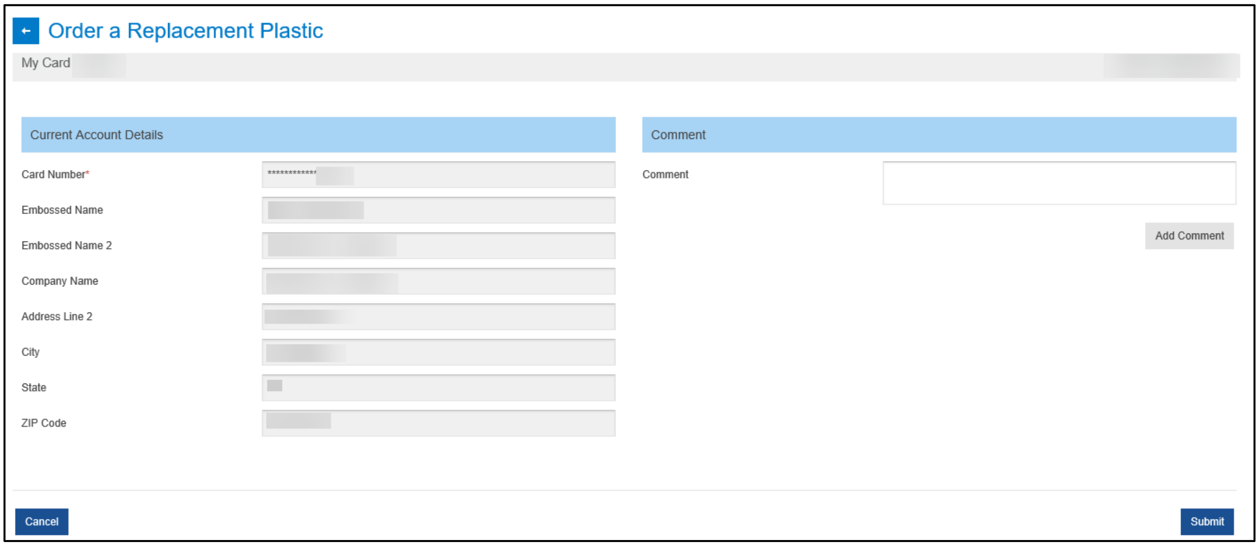
Follow these steps to order a replacement card:

1. Click **Order a Replacement Card**.



The *Order a Replacement Plastic* screen displays.

2. Confirm your information and click **Submit**.



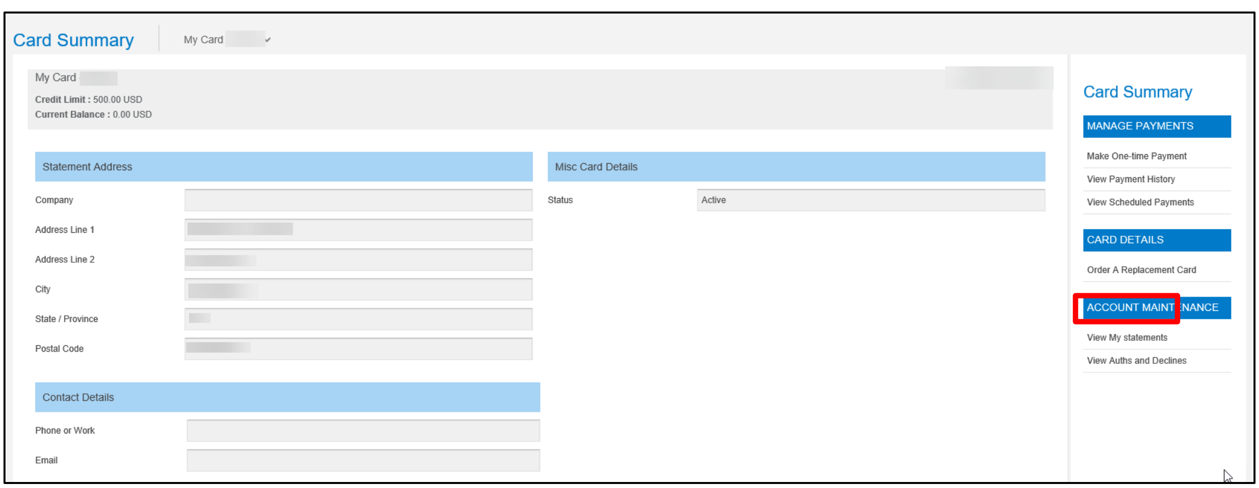
A replacement card has been ordered. You should receive it within 7-10 business days.

View My Statements

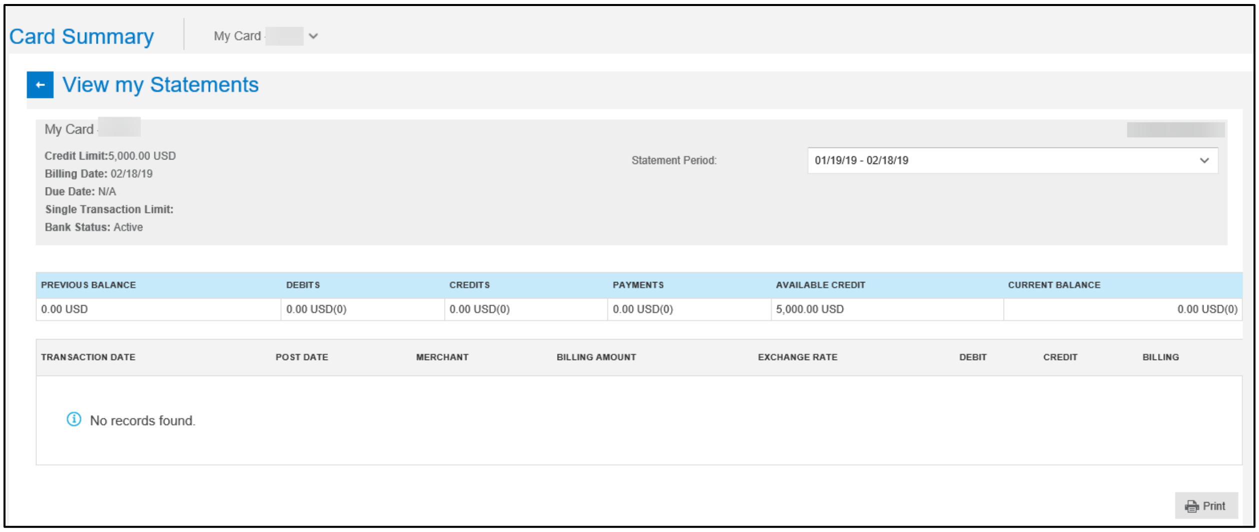
Cardholders can view their transactions within a specific statement date.

Follow these steps to view statements:

1. Click on the *Cards* tab.
2. Click the **View My Statements** link.



The *View My Statements* screen displays.



The transactions within the statement display. Click the **Statement Period** drop-down menu to access different statement periods.

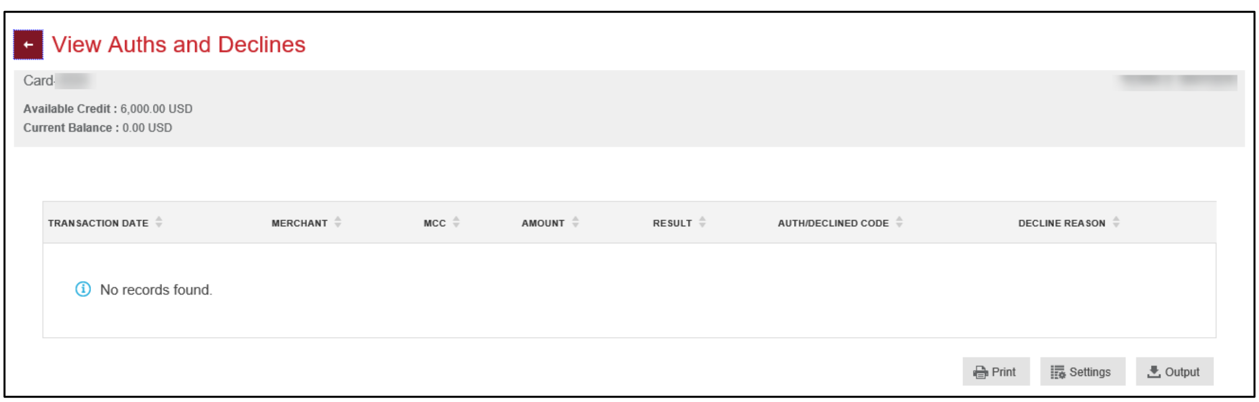
View Authorizations and Declines

Cardholders can view recent card transaction authorization requests and/or declined transactions and their details.

Follow these steps to view authorizations or declined transactions:

1. Click the *Cards* tab.
2. Click the **View Auths and Declines** link.

The *View Auths and Declines* screen displays the status of all card transactions in descending order.



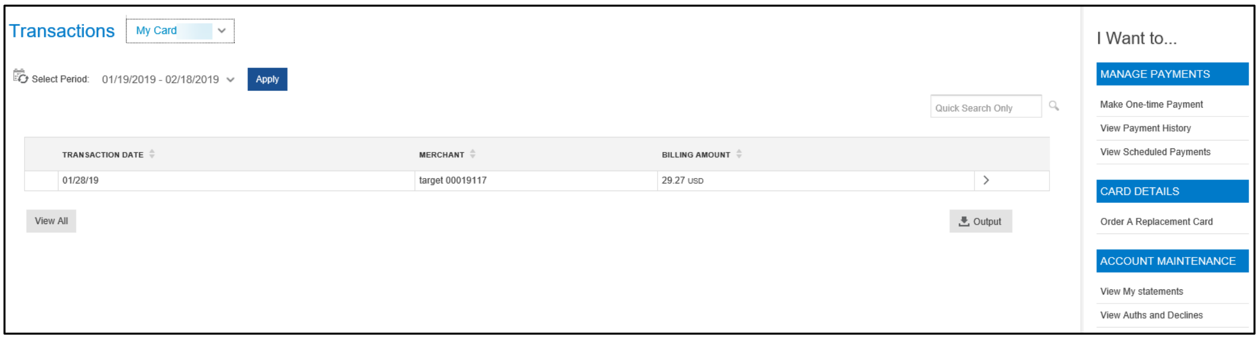
Simplified View

When you switch to the Simplified View, the *Transaction* screen displays.

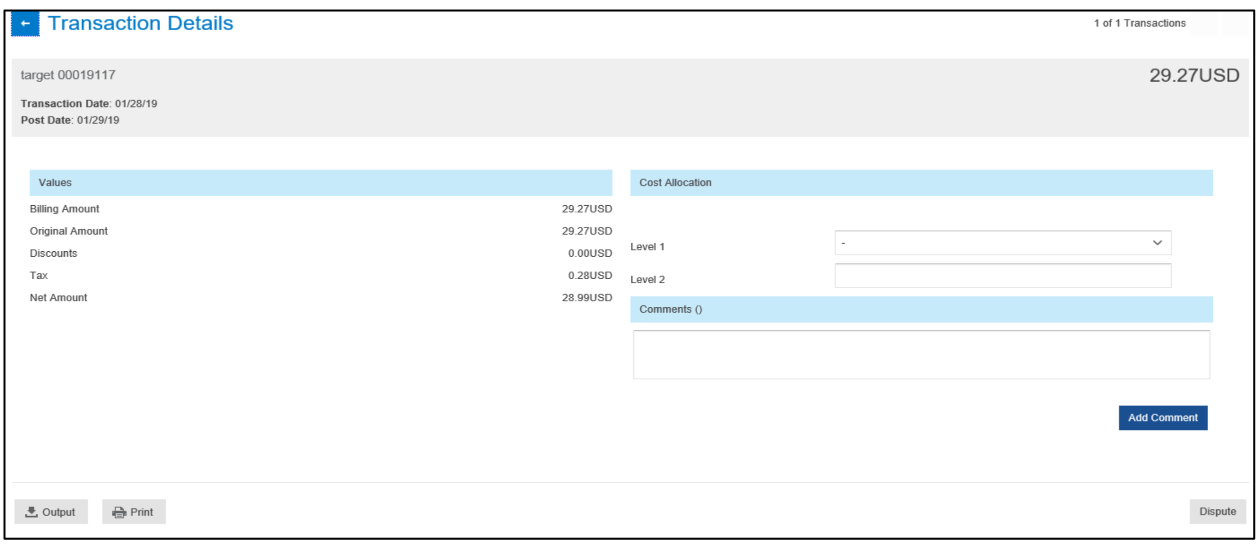
The transaction screen lists the following:

- Transaction Date
- Merchant
- Billing Amount

In addition, the same quick links from the *Cards* tab display.



Click the **carat** in the right column of the transaction to open *Transaction Details*.



From this screen, you can:

- Add Cost Allocation
- Add Comments
- Output the transaction details
- Print to a network printer