



**Business Credit Cards
360Control Cardholders**

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Important Definitions and Information

If you are in need of a **replacement credit card**, please contact your Program Administrator for assistance.

Note: For Fraud or Lost/Stolen cards, please **do not reissue** a credit card from 360Control; call the number on the back of the card to report fraud or contact KS StateBank.

If you need to report a **Lost** or **Stolen** card, please contact your Program Administrator or the Financial Institution for assistance.

Please contact your Program Administrator to ensure your **cell phone number** is connected to your card. In the instance that your card is declined while attempting to complete a transaction, the fraud alert system may place a temporary block and will call and/or text you right away to verify that the purchase is valid. Please answer these phone calls or texts and complete the prompts to unblock your account and complete the purchase. If you do not answer these notifications, the temporary block will stay in place—keeping you from making any purchases until you respond to the fraud center or contact the KS StateBank.

Log into 360Control:

- Type the **username** assigned to you by your Program Administrator
- Click **Login**
- Type your **Password**
- Click **Login**
- Type the last **4 digits of your credit card number**
- Click **Login**

Note: For login credentials entered incorrectly three consecutive times, you'll need to contact your Program Administrator to reset you.

Login

If you are an existing user click below to login.

Please enter your Username.

Login →

[Forgot Password?](#)

[Forgot Username?](#)

View and Manage Transactions

Under the Transactions tab, you may view the details of all card transactions for the company. A default filter is set to your *current statement to cycle date* plus all transaction status types.

Below is a list of 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 cardholder's card which 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 rental car 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

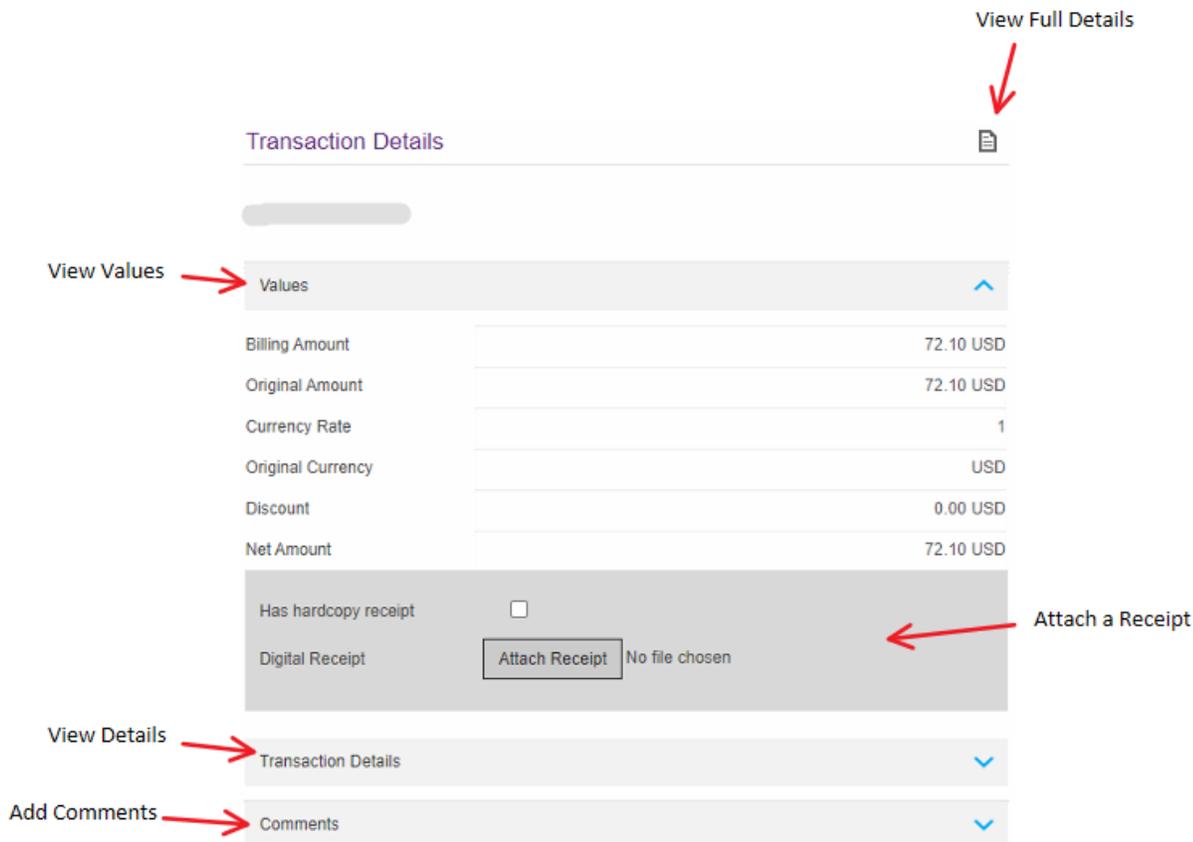
TRANSACTION DATE	POST DATE	CARDHOLDER	CARD	MERCHANT	BILLING AMOUNT	TRANSACTION STATUS	NET AMOUNT	ORIGINAL AMOUNT	DISCOUNT	TAX AMOUNT	TAX RATE	TAX CODE	REFERENCE	CARD CURRENCY	TR
01/11/22	01/11/22		*****		72.10 USD	% ⚠️ 📄	72.10 USD	72.10 USD	0.00 USD	0.00 USD	0.00%			USD	U:
01/12/22	01/12/22		*****		24.44 USD	% ⚠️ 📄	24.44 USD	24.44 USD	0.00 USD	0.00 USD	0.00%			USD	U:
01/12/22	01/14/22		*****		200.00 USD	% ⚠️ 📄	200.00 USD	200.00 USD	0.00 USD	0.00 USD	0.00%		8154171617	USD	U:
01/13/22	01/14/22		*****		38.15 USD	% ⚠️ 📄	38.15 USD	38.15 USD	0.00 USD	0.00 USD	0.00%		00002580005815389	USD	U:
01/20/22	01/21/22		*****		30.32 USD	% ⚠️ 📄	30.32 USD	30.32 USD	0.00 USD	0.00 USD	0.00%			USD	U:

- **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
- **Tax Code:** Client defined code representing the sales tax rate
- **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

Viewing Transaction Details

Each row of the transaction table contains information about the transaction. Depending on the merchant, additional rows/line items may be passed through. This may include unit cost, quantity or description of goods.

Select a **transaction** from the main list to view the **Transaction Details sidebar**. From the sidebar, you may:



View Full Details

Transaction Details 

View Values → Values 

Billing Amount	72.10 USD
Original Amount	72.10 USD
Currency Rate	1
Original Currency	USD
Discount	0.00 USD
Net Amount	72.10 USD

Has hardcopy receipt

Digital Receipt No file chosen

Attach a Receipt

View Details → Transaction Details 

Add Comments → Comments 

View Full Transaction Details

The Full Details icon allows you to switch to the Full Details view of the Transaction. The information in the Full Details view is the same as using each drawer in the sidebar; the information is arranged differently but the same details can be observed.

Transaction Details 

Adding a Comment to a Transaction

Comments can be left on transactions for the cardholder or Program Administrator's reference. These are viewable by anyone who has access to the cardholder's transactions.

- Select a transaction to open the Transaction Details sidebar
- Click the carat to open the Comments drawer
- Type in your text in the comments box
- Click Add Comment

Transaction Details

Attaching a Transaction Receipt

You can attach a copy of a receipt to a transaction using the attach receipt function. This is typically used by the cardholder in assisting the Program Administrator. PDF and Microsoft Word are accepted formats in the system.

- Select the transaction that you wish to attach the receipt to.
- Scroll to the gray section of the Values section in the Transaction Details sidebar.
- Click the Attach Receipt button.
- Click the Browse button to navigate to your receipt.
- Click the Open button to attach the receipt to the transaction.
- Click the Upload button to complete the attachment.

Transaction Details

Quick Search Transactions

You may search for specific transactions within the **Transactions** screen. This search can contain anything, including merchant name and transaction amount. Quick search only displays exact matches to the search criteria.

- Type in your **search item** in the Quick Search Only box in the top corner of your screen
- Click the **magnifying glass** or press **Enter**

In the below example, 38.15 was entered into the Quick Search field and one result populated.

Transactions My Card - Filters

Transaction Date: 01/02/22 - 01/26/22 X Transaction Status: New/Imported X Save

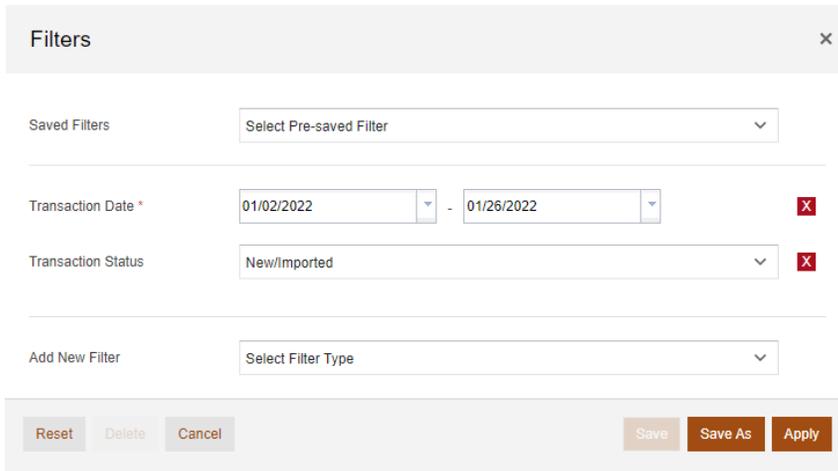
TRANSACTION DATE	POST DATE	CARDHOLDER	CARD	MERCHANT	BILLING AMOUNT	TRANSACTION STATUS	NET AMOUNT	ORIGINAL AMOUNT	DISCOUNT	TAX AMOUNT	TAX RATE	TAX CODE	REFERENCE	CARD CURRENCY	TF
01/13/22	01/14/22		*****		38.15 USD		38.15 USD	38.15 USD	0.00 USD	0.00 USD	0.00%		00002580005915389	USD	U

Show 20 Rows 1 - 1 of 1 1 Print Settings Output

Filters

Use filters on the transaction search or access previously pre-saved filters through the Filters screen

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

The screenshot shows a 'Filters' modal window with the following elements:

- Saved Filters:** A dropdown menu labeled 'Select Pre-saved Filter'.
- Transaction Date *:** Two date pickers showing '01/02/2022' and '01/26/2022', with a red 'X' icon to the right.
- Transaction Status:** A dropdown menu showing 'New/Imported', with a red 'X' icon to the right.
- Add New Filter:** A dropdown menu labeled 'Select Filter Type'.
- Buttons:** 'Reset', 'Delete', 'Cancel', 'Save', 'Save As', and 'Apply'.

Adding New Filters

Add additional filter fields, by selecting the **Add New Filter** drop-down menu.

Note: To clear previous filters, select the **X** next to the filter to remove it. The search will automatically update the results removing the previous filter added. You can also click the Save icon if you want to save this filter for future use.

Select **Transaction Status** to filter using a transaction status.

Options include:

- Approved
- Reviewed
- Disputed
- New/Imported
- Exported
- Unexported

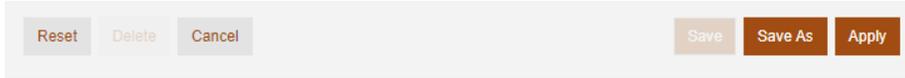
Additional options include:

- | | | |
|--|---|--|
| <input type="radio"/> Billing Amount | <input type="radio"/> First Name | <input type="radio"/> Tax Error No./Desc |
| <input type="radio"/> Billing Currency | <input type="radio"/> Last Name | <input type="radio"/> Tax Status |
| <input type="radio"/> Card | <input type="radio"/> Level | <input type="radio"/> Transaction Type |
| <input type="radio"/> Cardholder | <input type="radio"/> MCC Code Desc. | |
| <input type="radio"/> Comments | <input type="radio"/> Original Currency | |
| <input type="radio"/> Cost Allocation | <input type="radio"/> Post Date | |
| <input type="radio"/> Cost Allocation Status | <input type="radio"/> Received | |
| <input type="radio"/> Country of Origin | <input type="radio"/> Stan Ref | |
| <input type="radio"/> Entity | <input type="radio"/> Tax Code Desc | |

If you have previously saved filters and wish to use it again, select the **Filter** name from the **Saved Filters** drop-down menu.

There is additional functionality within the Filters popup.

- **Reset:** Removes all filter criteria which has been set
- **Delete:** If a pre-saved filter has been selected, a Program Administrator can delete it
- **Cancel:** Returns the user back to the transactions screen
- **Save:** If a pre-saved filter has been selected, the Program Administrator 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



Select **Apply** once you've selected the filter options you wish to view.

Transactions | My Card - 

Filters | Quick Search Only 

Transaction Date: 01/02/22 - 01/27/22 X | Transaction Status: New/Imported X | Save 

TRANSACTION DATE	POST DATE	CARDHOLDER	CARD	MERCHANT	BILLING AMOUNT	TRANSACTION STATUS	NET AMOUNT	ORIGINAL AMOUNT	DISCOUNT	TAX AMOUNT	TAX RATE	TAX CODE	REFERENCE	CARD CURRENCY	TF
<input type="checkbox"/> 01/11/22	01/11/22		*****		72.10 USD	% ⚠️	72.10 USD	72.10 USD	0.00 USD	0.00 USD	0.00%			USD	U
<input type="checkbox"/> 01/12/22	01/12/22		*****		24.44 USD	% ⚠️	24.44 USD	24.44 USD	0.00 USD	0.00 USD	0.00%			USD	U

Viewing Authorizations and Declines

Cardholders can view their authorizations and declines, which allows access to see any recent card transaction authorization requests and/or declined transactions and their details.

- Click the **Administration** header and select **Users & Cards**
- Click the checkbox next to your card
- Click the paper icon at the top right of the **User & Card Details** panel to open the **Card Full Details** menu
- Click the **View Auths and Declines** link on the right

The new screen displays the status of all card transactions in descending order.

The most common decline reasons include the card being **Overlimit** (either overall company limit or the individual cardholder limit), **Address Mismatch** (street address or zip code), invalid **CVV2 Security Code**, etc. If the transaction declines when attempting to make a purchase, but it does not show on this **View Auths and Declines** page, the transaction is being declined on the merchant side—not the Financial Institution's.

Additional Functions

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

Transactions | My Card - 

Filters | Quick Search Only 

Transaction Date: 01/02/22 - 01/26/22 X | Transaction Status: New/Imported X | Save 

TRANSACTION DATE	POST DATE	CARDHOLDER	CARD	MERCHANT	BILLING AMOUNT	TRANSACTION STATUS	NET AMOUNT	ORIGINAL AMOUNT	DISCOUNT	TAX AMOUNT	TAX RATE	TAX CODE	REFERENCE	CARD CURRENCY	TF
<input type="checkbox"/> 01/11/22	01/11/22		*****		72.10 USD	% ⚠️	72.10 USD	72.10 USD	0.00 USD	0.00 USD	0.00%			USD	U
<input type="checkbox"/> 01/12/22	01/12/22		*****		24.44 USD	% ⚠️	24.44 USD	24.44 USD	0.00 USD	0.00 USD	0.00%			USD	U
<input type="checkbox"/> 01/12/22	01/14/22		*****		200.00 USD	% ⚠️	200.00 USD	200.00 USD	0.00 USD	0.00 USD	0.00%		\$154171617	USD	U
<input type="checkbox"/> 01/13/22	01/14/22		*****		38.15 USD	% ⚠️	38.15 USD	38.15 USD	0.00 USD	0.00 USD	0.00%		00002580005815389	USD	U
<input type="checkbox"/> 01/20/22	01/21/22		*****		30.32 USD	% ⚠️	30.32 USD	30.32 USD	0.00 USD	0.00 USD	0.00%			USD	U

Show: 20 | Rows 1 - 5 of 5 | 1 |  Print  Settings  Output

Printing Transactions

The Transactions screen can be printed by the user.

Note: This is not to be used to print a statement. Please see **page 8** for printing statements.

Settings and Adjusting the Transactions Screen

Customize the elements displayed or reorganize the position of columns on the Transactions screen

- Click the Settings button at the bottom of the Transactions screen
- Click the checkbox(es) under the List/Detail column to add or remove the column from the Transaction screen
- Click in the position column and assign the columns in numerical order that you wish to display
- Click **Apply**

Downloading and Saving Transactions

Data from 360Control are exportable in a number of file formats—including Excel, CSV, and more.

- Click the Output button at the bottom of the Transactions screen
- Select the appropriate column and row selection for your desired export
- Click the Output File button

Note: The Quicken and Quickbooks options will export the columns required for use with Intuit Quicken or QuickBooks software.

View and Manage Statements

Under the Statements tab, you may view transactions by statement period.

Note: The user may only enroll in one delivery method—paper or electronic. If the option for both is selected, you will *only* receive the paper statement—*not* electronic.

Enrolling in E-Statements

The system retains three months of historical E-Statements.

- Click the **Statements** tab
- Click the pencil next to **Email Address** to edit which email you'd like to have statements sent to

Note: Updating the email address here will also update the information in the user profile.

- Click the pencil next to **Delivery Method**
- Select **Receive Electronic Statement Only**

Note: Users are unable to choose *both* electronic *and* paper.

- Click **Update**

Card Account Details

Bank Status:
Active

CAC Level 2:

Delivery Method:
Paper

Email Address:





Downloading and Printing E-Statements

E-Statements released prior to enrollment will not be available to download. Only those released post-enrollment will be available.

- Click the **Statements** tab
- Select the statement you wish to view in the right panel

Statements	
STATEMENT	
01/02/22	>
12/02/21	>
11/02/21	>
10/01/21	>

Without E-Statements, you will view the standard statement page, which allows you to select a date range and view the transactions for that period. Regulated statements cannot be downloaded, only PDF documents of the transactions during certain statement cycles.

Note: The system retains a 12 month rolling cycle period for those without E-Statement enrollment.

Managing Your User and Card

Setting a Traveling Card

Users can set traveling dates for credit cards so they are not blocked by the fraud detection when out of state or country.

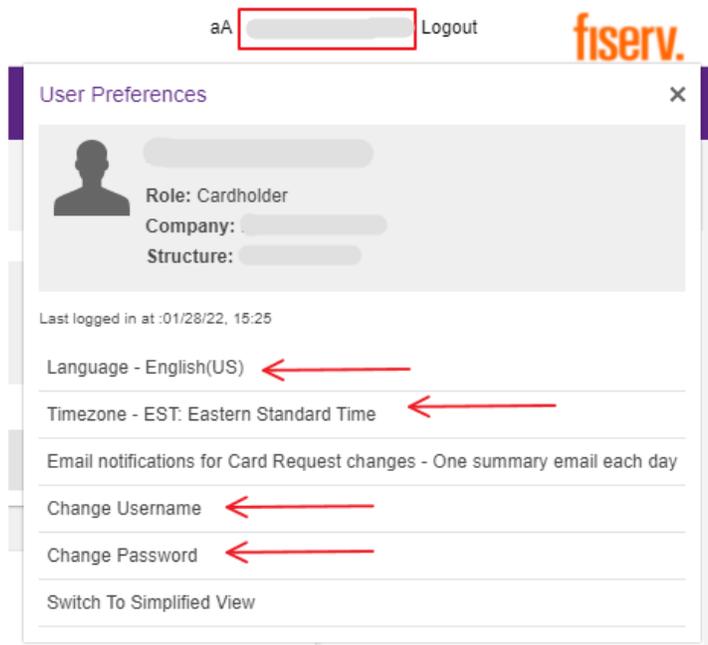
- Click the **Administration** tab and select **Users & Cards**
- Click the checkbox next to your card
- Click the blue carat to expand the **Useful Links** section at the bottom of the popup
- Click the **Add/Edit Travel Notification** link at the bottom
- Select the appropriate radio button under Destination: Domestic or International
 - If Domestic, select the states in which the card will be used
 - If International, type in the countries in which the card will be used
- Input the appropriate Dates of Travel using the dropdowns
- Click Submit

Note: If necessary, you may select the checkbox next to **Remove Travel Notification** to cancel the traveling card setting.

Change User Preferences

Users can change their account details, such as language, Timezone, username, and password.

- Click on your name at the top right corner of the screen
- Select whichever option you are attempting to change
- Make adjustments, as needed
- Click Update



The screenshot shows the 'User Preferences' dialog box. At the top right, there is a user profile icon with the text 'aA' and a 'Logout' link. The dialog box contains the following information:

- User Information:** Role: Cardholder, Company: [redacted], Structure: [redacted]
- Last logged in at:** 01/28/22, 15:25
- Language:** English(US) (indicated by a red arrow)
- Timezone:** EST: Eastern Standard Time (indicated by a red arrow)
- Email notifications for Card Request changes:** One summary email each day
- Change Username:** (indicated by a red arrow)
- Change Password:** (indicated by a red arrow)
- Switch To Simplified View:**