

Commercial Card Management

USER GUIDE



Card Management Reference Guide

The 360 Control Card Management online user interface provides Program Administrators with the ability to open new cards, maintain existing cards, view authorization activity, and set transaction, spend, and MCC restrictions.

The following sections of this reference guide are available to assist you in the use and navigation of the Card Management system.

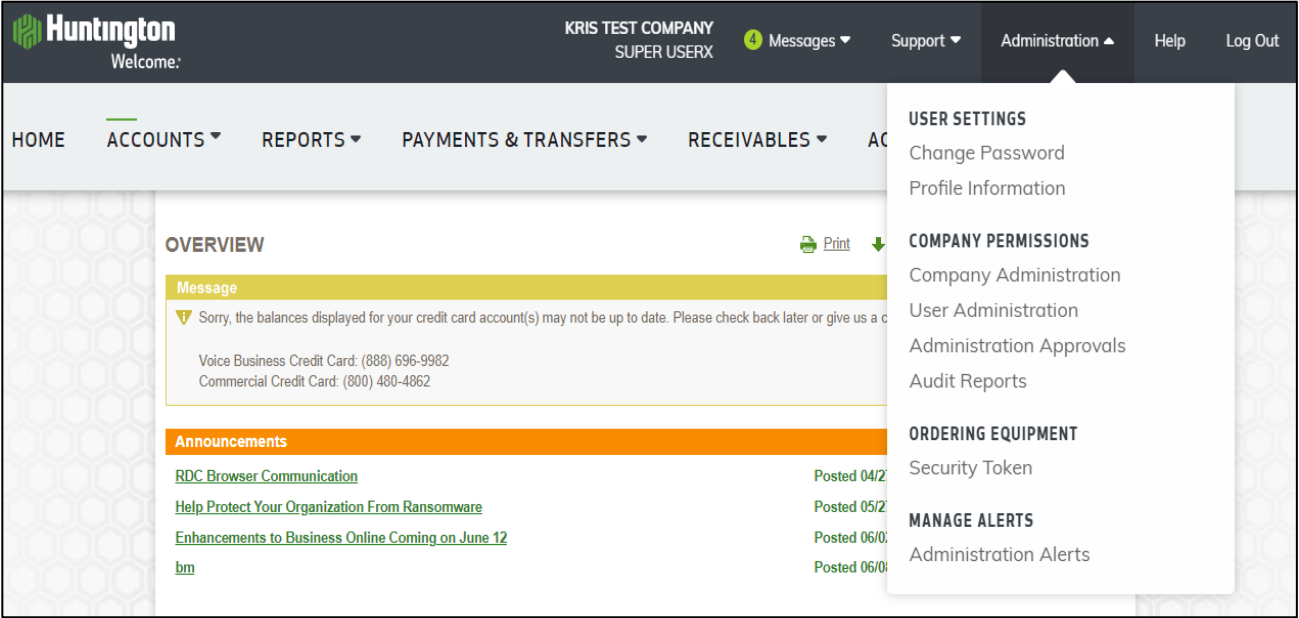
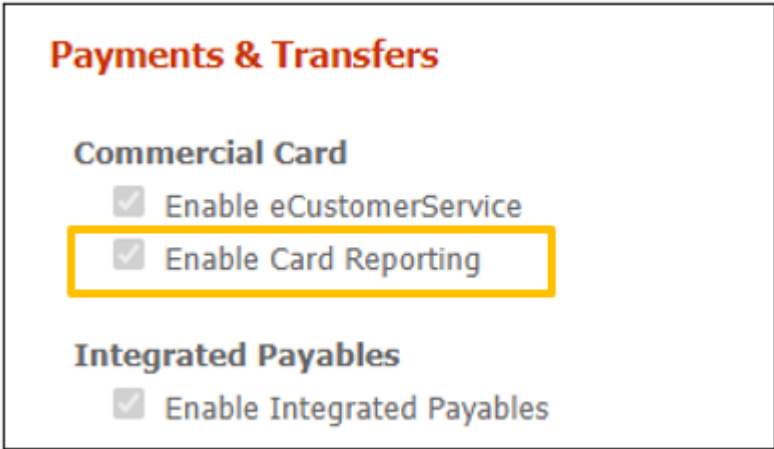
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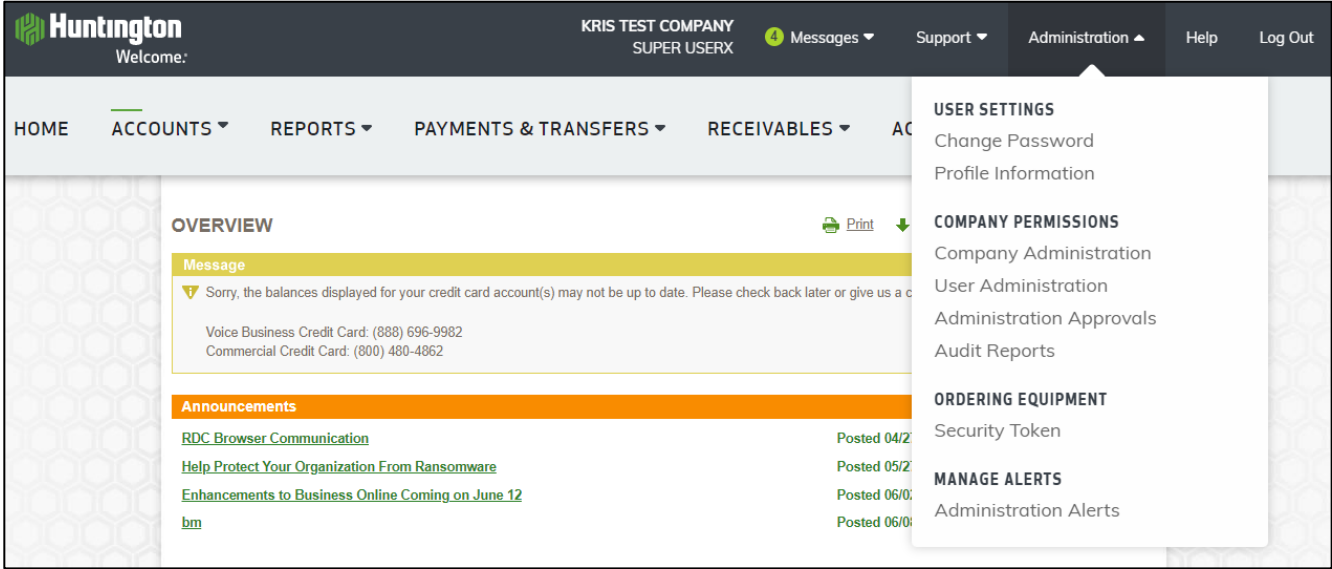
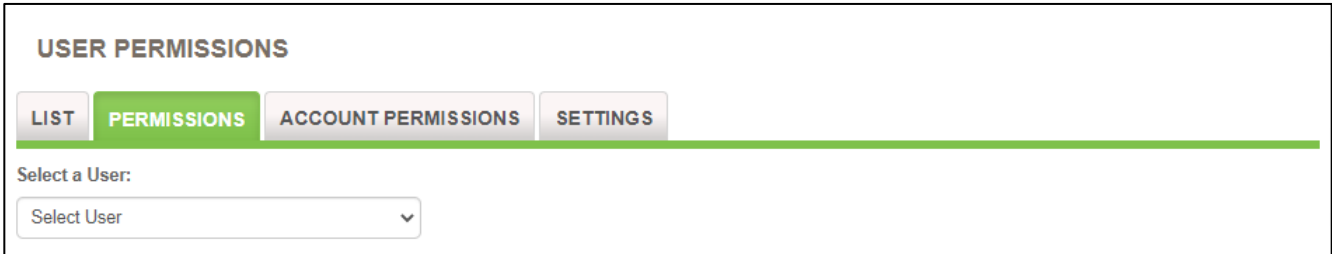
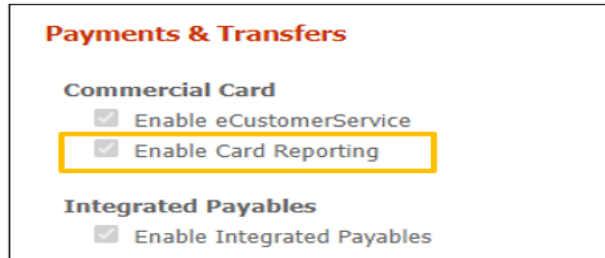


Set Up Card Management Permissions on BOL

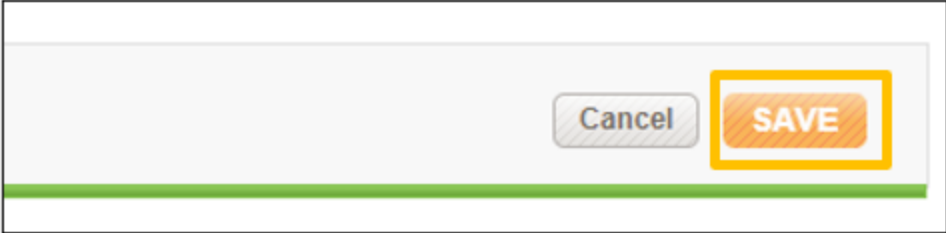
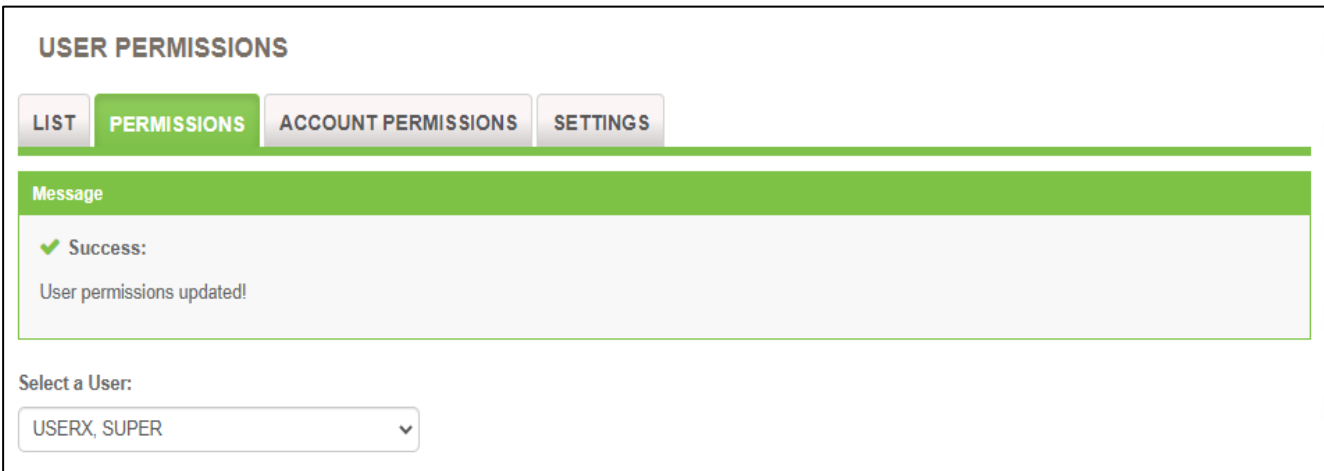
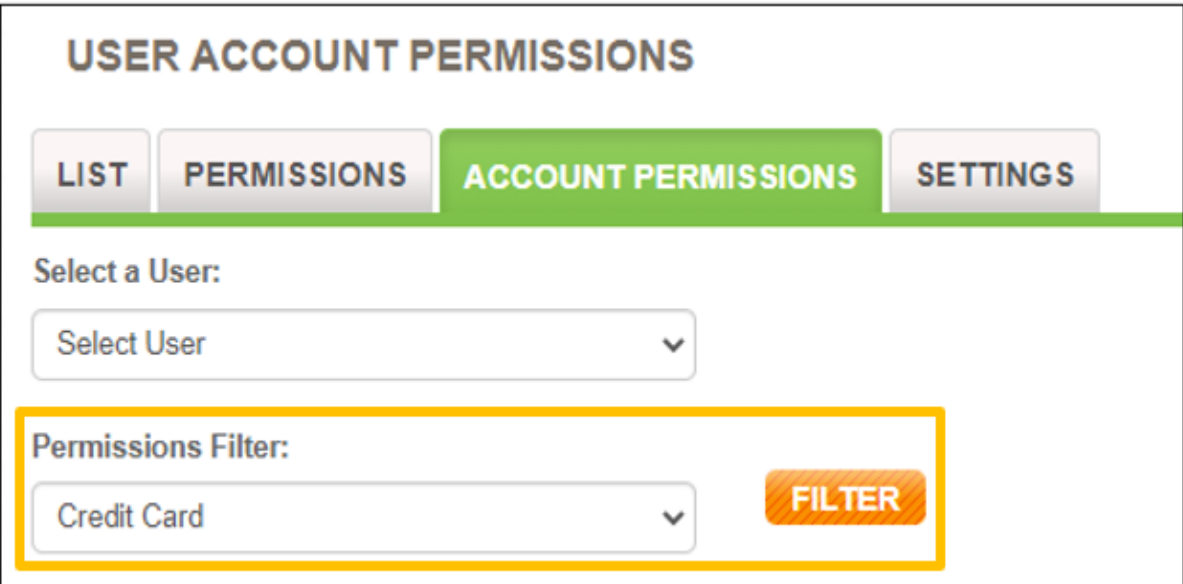
To set up Card Management Permissions on Business Online (BOL), please follow the below steps:

Step	Action
1	Log onto BOL and go to Administration > Company Administration. The Company page opens. 
2	Under the Permissions tab, scroll down to the Payments & Transfers section. Make sure that the Company Permissions is checked next to Enable Card Reporting. If the company is not enabled for Card Management, please contact 1-800-480-4862, option 7, Monday-Friday 8:00 am-5:00 pm to be enrolled. 

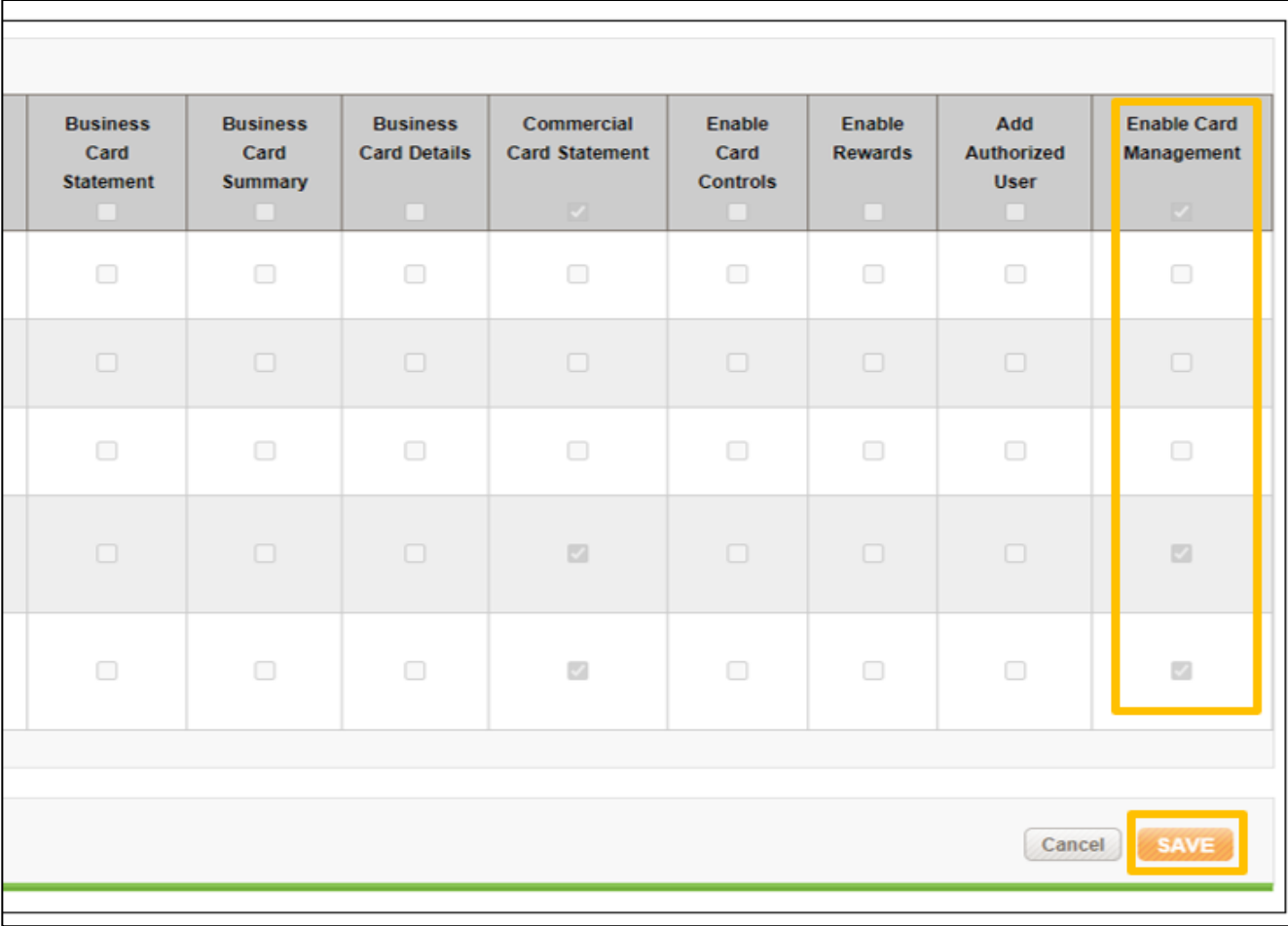
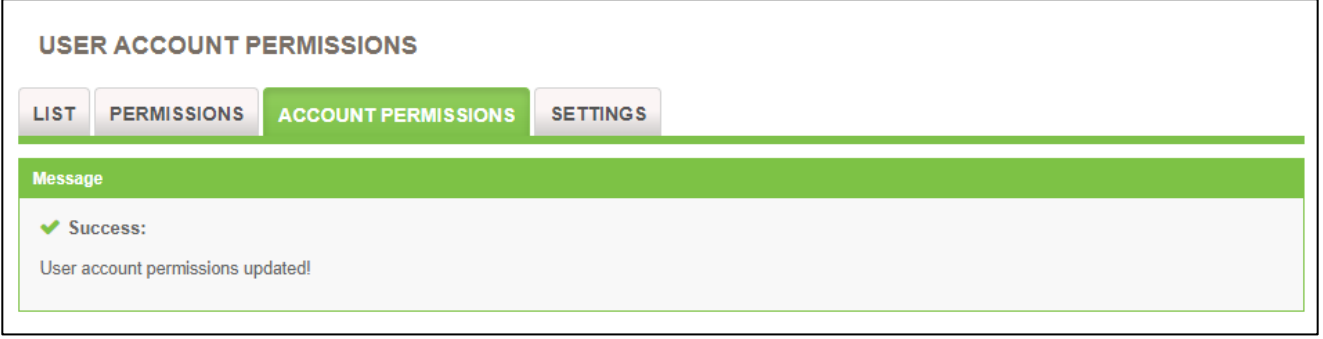
Set Up Card Management Permissions on BOL

Step	Action
3	Go to Administration > User Administration. The User page opens. 
4	On the Permissions tab, choose a user from the Select a User drop-down menu. 
5	Scroll down to the Payments & Transfers section. Under the Commercial Card options, make sure that the User Permissions is checked next to Enable Card Reporting. If the user is not enabled for Card Reporting, please contact your Business Online Administrator to enable the user for Card Reporting. 

Set Up Card Management Permissions on BOL

Step	Action
6	Scroll to the bottom of the page and click Save. 
7	A success message at the top of the User Page indicates that the User Permissions have been updated. 
8	Switch to the Account Permissions tab. Choose a user from the Select a User drop-down menu and set the Permissions Filter menu to Credit Card. Click the Filter button. 

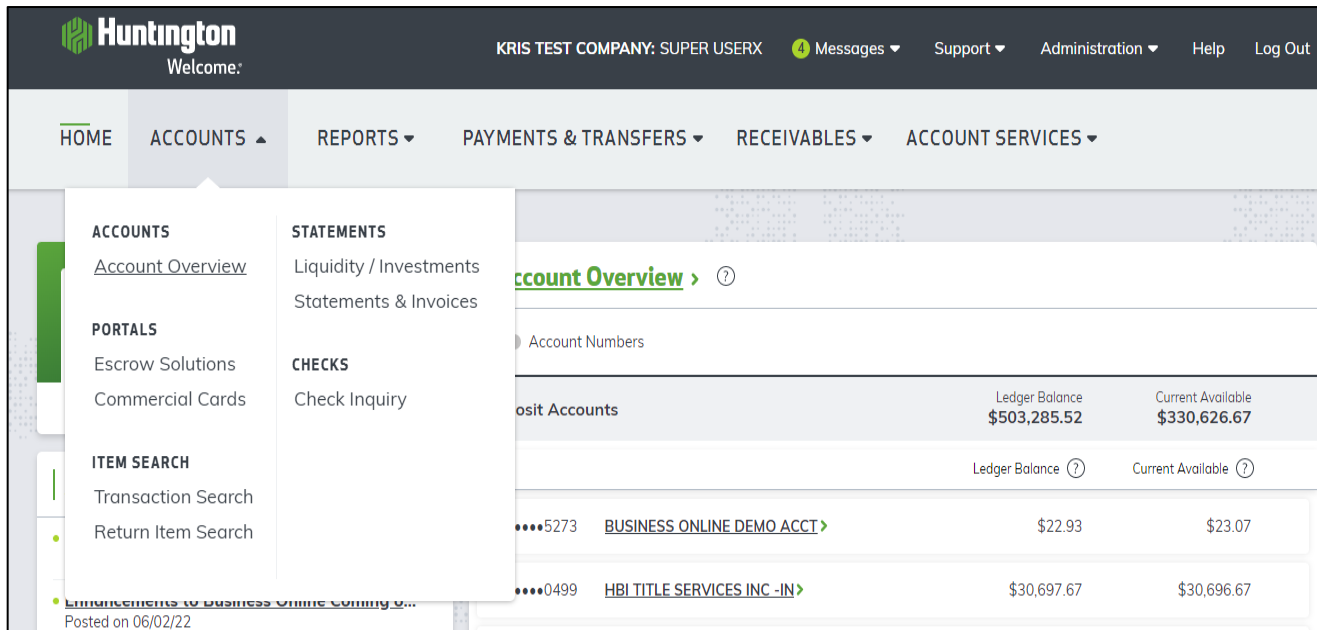
Set Up Card Management Permissions on BOL

Step	Action
9	In the Enable Card Management column of the Function Matrix, select your Commercial Card accounts and then click the Save button. 
10	A success message at the top of the User Page indicates that the User Function Matrix has been updated. 



Card Management Navigation on Business Online

To access the Card Management system on BOL, follow these steps to navigate to the Credit Cards tab and perform Single Sign-on (SSO) to the Card Management system:

Step	Action																																								
1	Log onto BOL and go to Accounts > Account Overview. The Overview page opens. 																																								
2	On the Overview page, scroll down to the Credit Cards section. The Credit Cards section lists each Credit Card's account information.  <table><tr><th colspan="4">Credit Cards</th><th>Sort Accounts</th></tr><tr><th>Account Number</th><th>Account Nickname</th><th>Credit Limit</th><th>Available Credit</th><th>Current Balance</th></tr><tr><td></td><td>BCC FQ 1</td><td>\$50,000.00</td><td>\$48,281.00</td><td>\$1,718.06</td></tr><tr><td></td><td>BCC FR 1</td><td>\$5,000.00</td><td>\$4,885.00</td><td>\$114.70</td></tr><tr><td></td><td>TSYS BIN 3</td><td>\$75,000.00</td><td>\$69,749.00</td><td>\$5,250.77</td></tr><tr><td></td><td>TSYS BIN 4</td><td>\$75,000.00</td><td>\$49,849.00</td><td>\$25,150.35</td></tr><tr><td></td><td>FMER BIN 2</td><td>\$500,000.00</td><td>\$499,800.00</td><td>\$200.00</td></tr><tr><td>Total</td><td></td><td>\$945,000.00</td><td>\$882,881.00</td><td>\$62,115.82</td></tr></table>	Credit Cards				Sort Accounts	Account Number	Account Nickname	Credit Limit	Available Credit	Current Balance		BCC FQ 1	\$50,000.00	\$48,281.00	\$1,718.06		BCC FR 1	\$5,000.00	\$4,885.00	\$114.70		TSYS BIN 3	\$75,000.00	\$69,749.00	\$5,250.77		TSYS BIN 4	\$75,000.00	\$49,849.00	\$25,150.35		FMER BIN 2	\$500,000.00	\$499,800.00	\$200.00	Total		\$945,000.00	\$882,881.00	\$62,115.82
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Card Management Navigation on Business Online

Step

Action

3

Click on the desired **Account Nickname** hyperlink. This will route you to the Credit Cards page.

Credit Cards					Sort Accounts
Account Number	Account Nickname	Credit Limit	Available Credit	Current Balance	
	BCC FQ 1	\$50,000.00	\$48,281.00	\$1,718.06	
	BCC FR 1	\$5,000.00	\$4,885.00	\$114.70	
	TSYS BIN 3	\$75,000.00	\$69,749.00	\$5,250.77	
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	FMER BIN 2	\$500,000.00	\$499,800.00	\$200.00	
Total		\$945,000.00	\$882,881.00	\$62,115.82	

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On the Credit Cards page, in the Card Management section, click **Continue**.

Huntington
Welcome:

KRIS TEST COMPANY
SUPER USERX

4 Messages

Support

Administration

Help

HOME

ACCOUNTS

REPORTS

PAYMENTS & TRANSFERS

RECEIVABLES

ACCOUNT SERVICES

CREDIT CARDS

Card Reporting

SmartData provides necessary transaction and reporting capabilities for transparency into your company's spending. Expense management tools are also available to companies signed up for them.

YOU'RE ABOUT TO LEAVE OUR SITE
You're about to leave Business Online and go to a site Huntington doesn't control. Different privacy and security practices may apply. See you back here soon!

LEAVE HUNTINGTON AND LOG IN

Card Management

360 Control allows you to maintain your card program online. You can order new cards, maintain current cards and review current authorizations.

CONTINUE

Print

Bottom

Support Center

Quick Reports

Statements/Invoices

My Information

Explore More Services

Quick Links

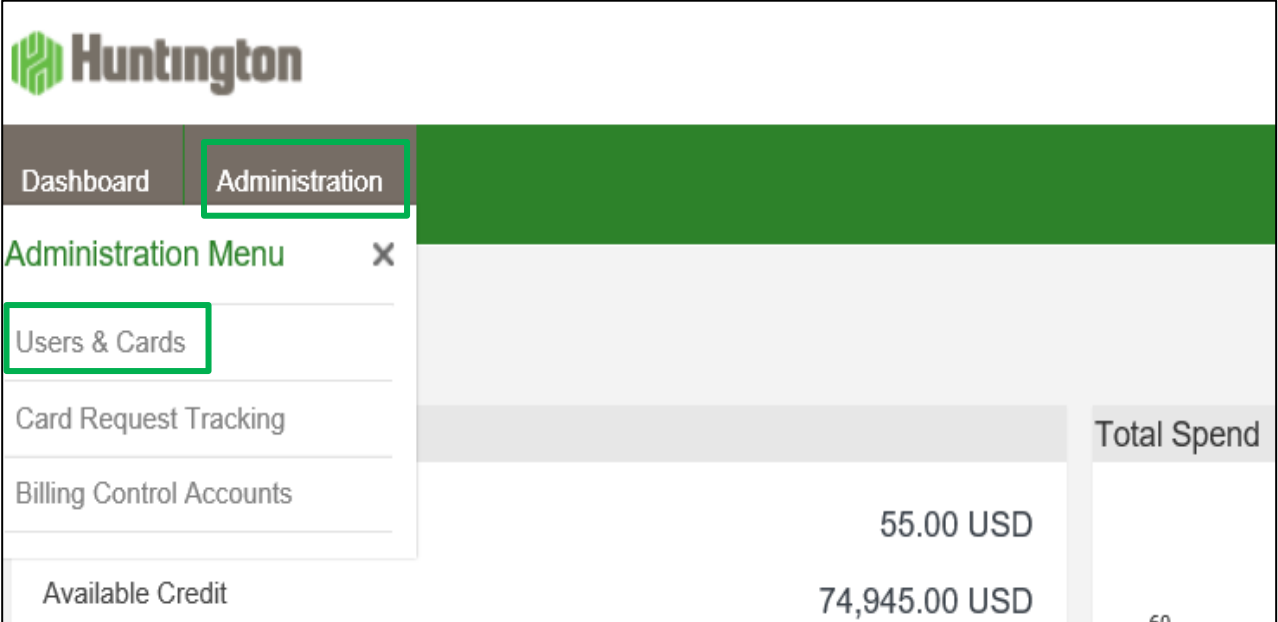
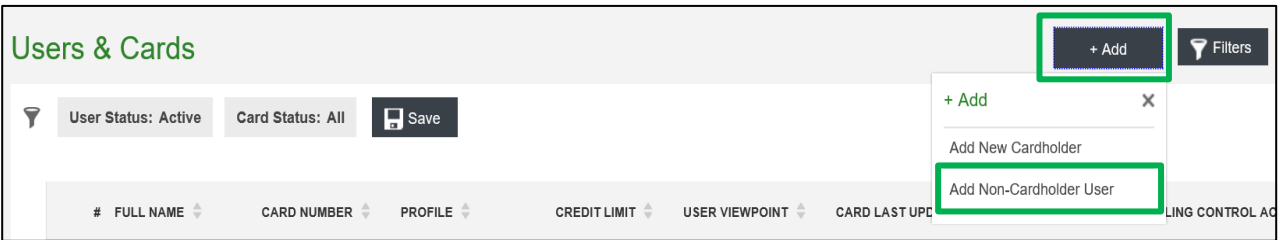
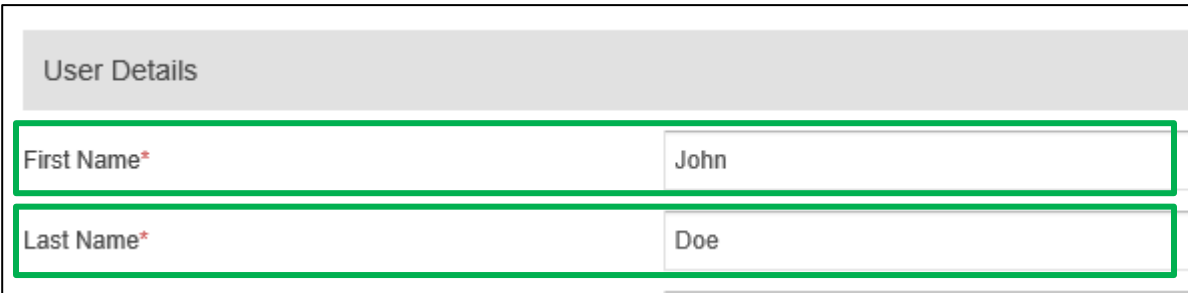
Security Center

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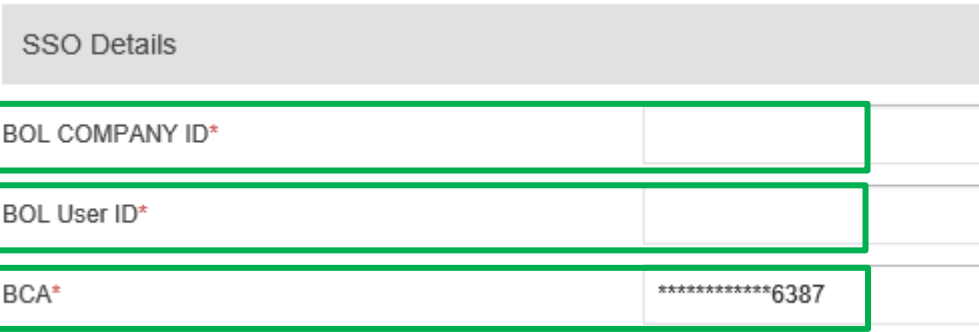
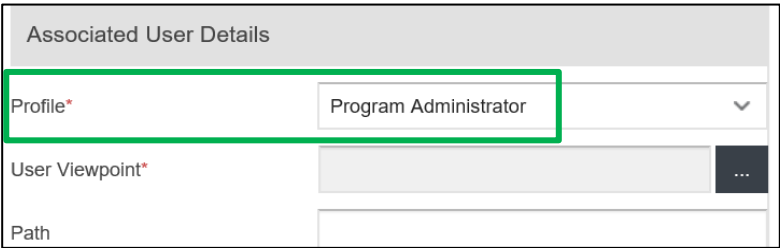
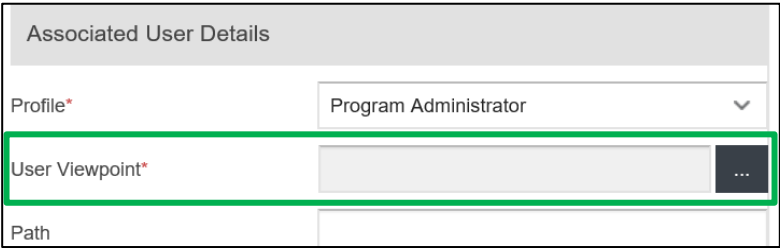


Add a New Card Management User

This training guide will provide details on how to set up and change permissions for Program Administrator Users.

Step	Action
1	From the Card Management Dashboard, go to Administration > Users & Cards. 
2	On the Users & Cards screen, go to +Add > Add Non-Cardholder User. 
3	Enter all required User information. In the User Details section, enter the user's First Name and Last Name. 

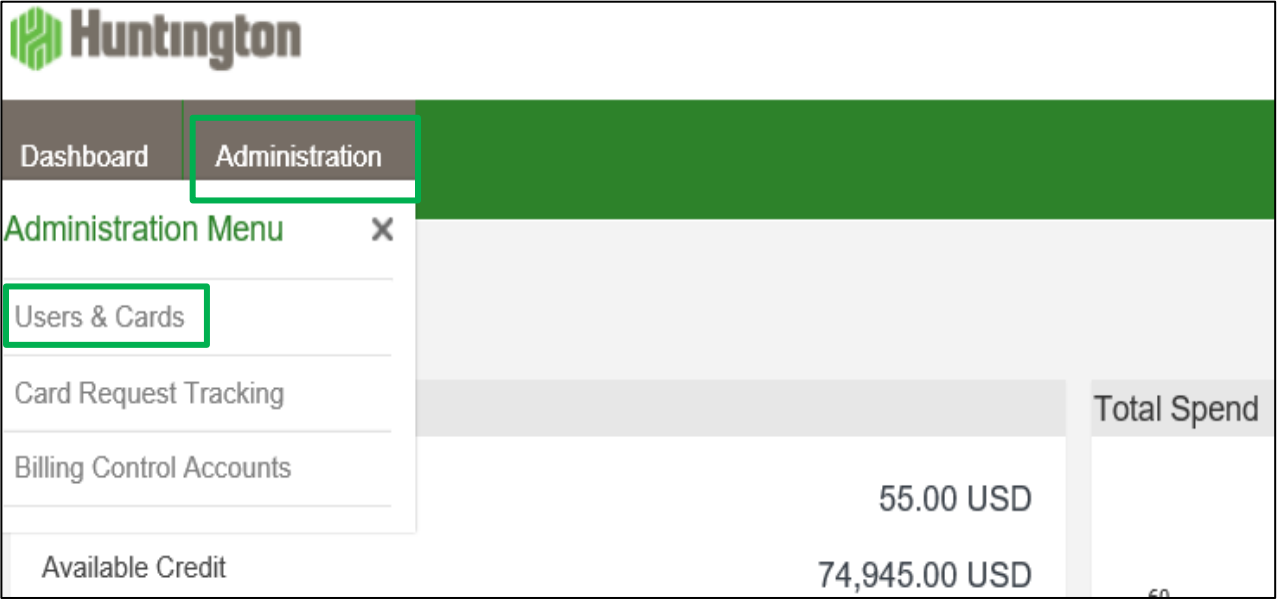
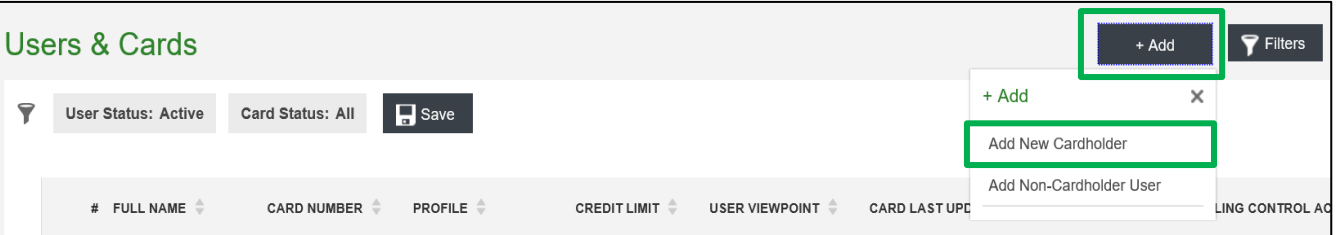
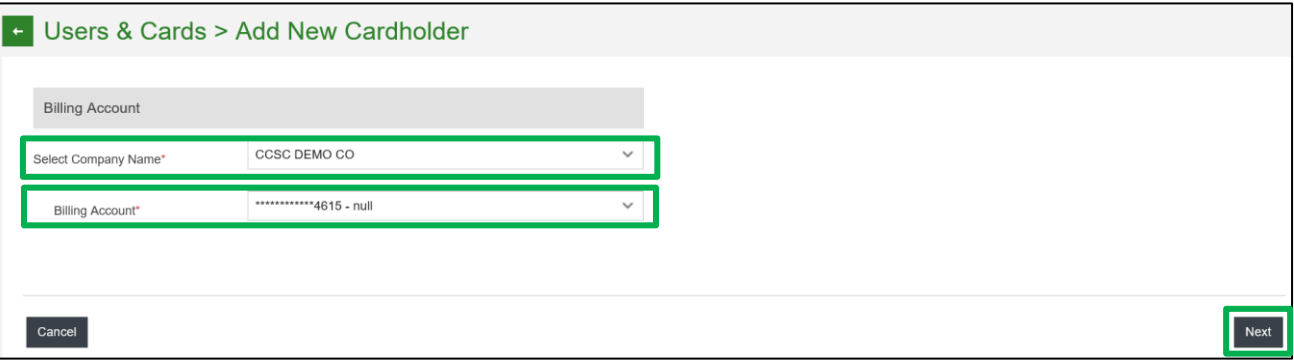
Add a New Card Management User

Step	Action
4	In the SSO Details section, enter the BOL Company ID, BOL User ID, and select the last 4 digits of the Commercial Card Account Number. You can find this account number on Business Online or on your statement.  The screenshot shows the 'SSO Details' section with three input fields: 'BOL COMPANY ID*', 'BOL User ID*', and 'BCA*'. The 'BCA*' field contains '*****6387', with the last four digits '6387' highlighted in green.
5	In the Associated User Details section, assign the user's Profile based on what permissions you want the User to have in the Card Management system. There are 3 primary profiles: 1. Program Administrator: Users can do everything within Card Management. 2. Program Admin Maintenance: Users can do everything except open new cards or add new Card Management Users. 3. Program Admin View Only: Users can only view, not maintenance, cardholders. These users can also view authorizations.  The screenshot shows the 'Associated User Details' section. The 'Profile*' dropdown menu is set to 'Program Administrator'. The 'User Viewpoint*' field has a dropdown arrow, and the 'Path' field is empty.
6	Select the User Viewpoint and complete any other required fields.  The screenshot shows the 'Associated User Details' section. The 'User Viewpoint*' dropdown menu is highlighted in green, showing a list of options. The 'Profile*' dropdown menu is set to 'Program Administrator'.
7	Click Submit. The new User will now be able to access Card Management by signing into Business Online.  The screenshot shows the bottom of the form with two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted in green.



Open a New Commercial Credit Card

To open a new commercial credit card for an employee, please follow the below steps:

Step	Action
1	From the Card Management Dashboard, go to Administration > Users & Cards. This will load all existing cardholders for you. 
2	On the Users & Cards screen, go to +Add > Add New Cardholder. 
3	Select your Company Name and Billing Account number that you would like to open the card up under. Click Next. Users with merged company access will only see the billing accounts that they have permissions to on BOL. 

Open a New Commercial Credit Card

Step

Action

Enter all required cardholder account details and click **Next**.



Note: Rushing the card may result in a fee.



Note: The name entered in the Embossed Name 1 field is the cardholder name that will print on the card.



Note: The name defaulted in the Embossed Name 2 field is the company name that will print on the card.



Note: The Embossed Name 2 (Custom) field should only be completed when you want to have a different company name printed on the card plastic than what currently appears in the Embossed Name 2 field.

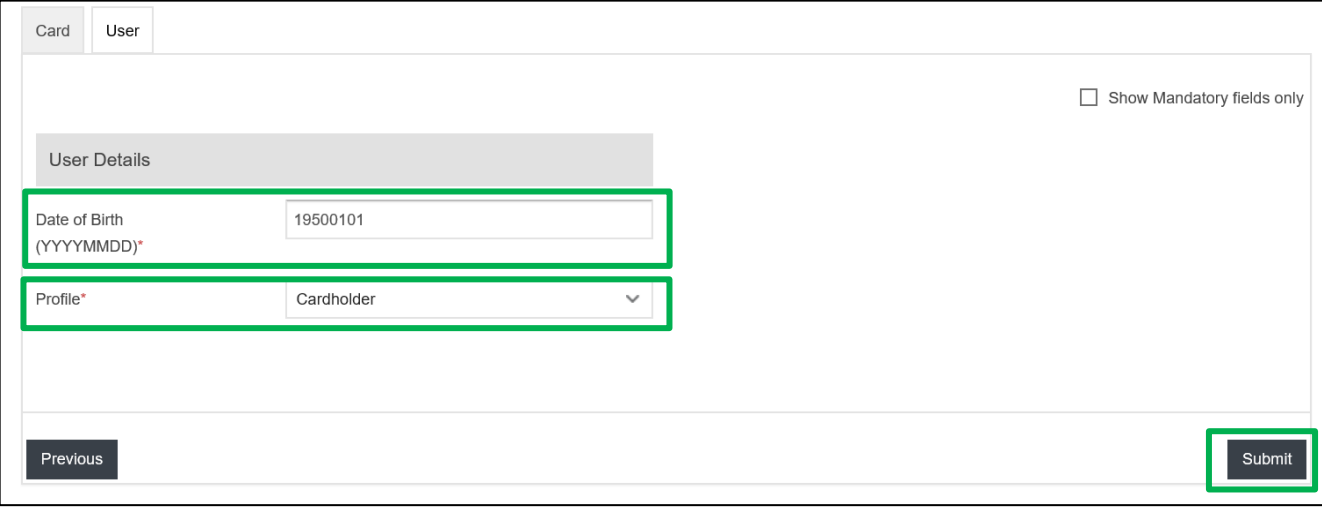
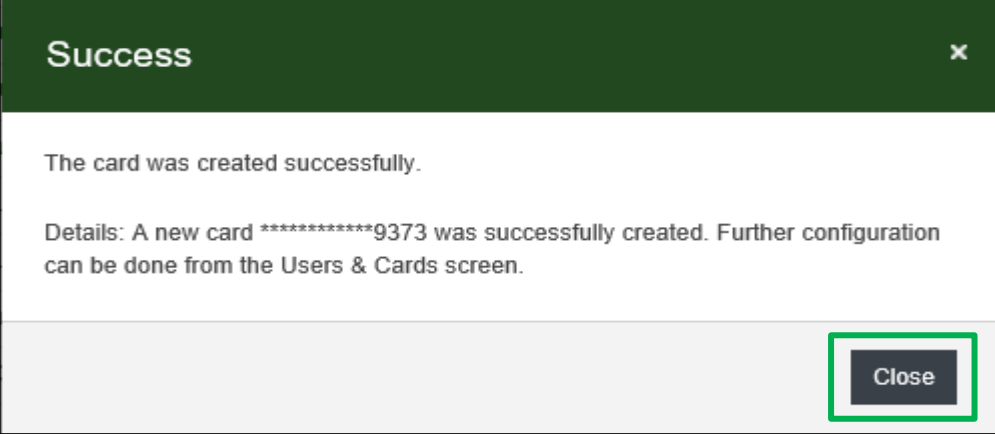
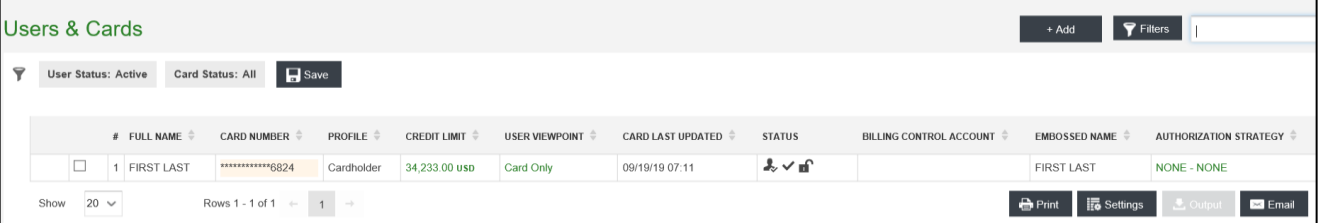
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The screenshot shows the Huntington credit card application form. At the top, there is a header with the Huntington logo and a card number field displaying "*****8789 - null". Below the header, there are two tabs: "Card" and "User". The form is divided into several sections:

- Account Details:** Includes fields for First Name*, Middle Name, Last Name*, Embossed Name 1*, Name Format (with a note: "Name Format: Please ensure the embossed name is in the following format: 'First Name Middle Name Last Name'. E.g. 'John Michael Doe'. This will be printed as 'John Michael Doe' on the plastic."), Embossed Name 2 (pre-filled with "TEST COMPANY C"), Embossed Name 2 (Custom), Employee ID, and Verification ID.
- Billing/Mailing Address:** Includes fields for Attention To*, Address Line 1*, Address Line 2, City*, State/Province* (pre-filled with "OH- Ohio, USA"), Postal Code*, Mobile Phone*, Work Phone*, and Home Phone.
- Plastic Shipping Method:** Includes a dropdown for Card Delivery Method* (pre-filled with "Standard (7-10 business days)").
- Limit Details:** Includes fields for Credit Limit* and Cash Credit Limit (pre-filled with "0").

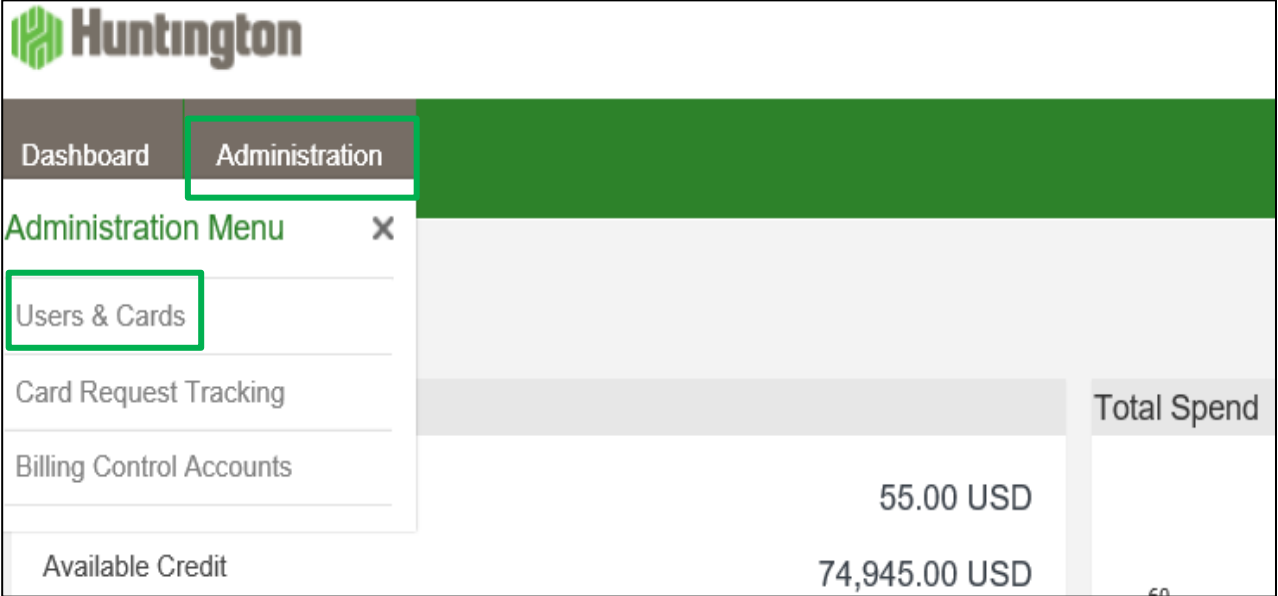
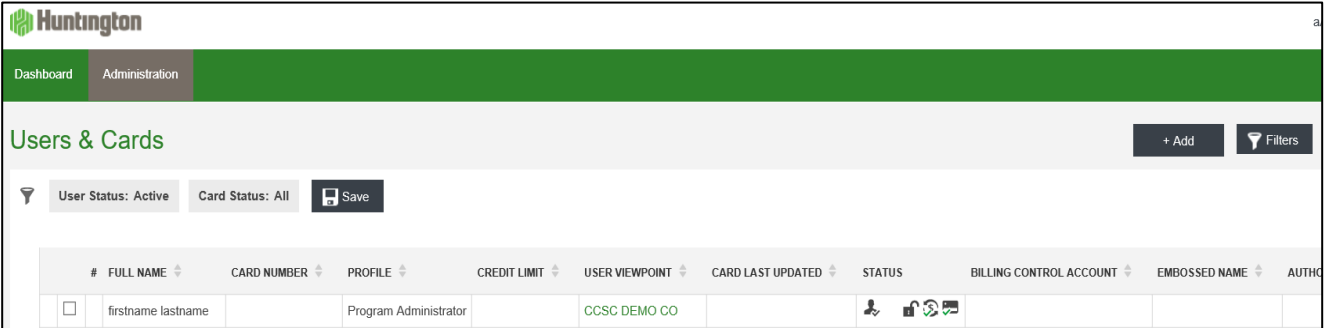
There is a checkbox labeled "Show Mandatory fields only" in the top right corner of the form.

Open a New Commercial Credit Card

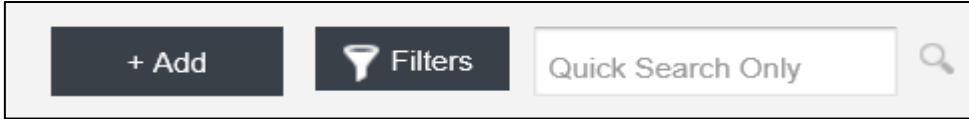
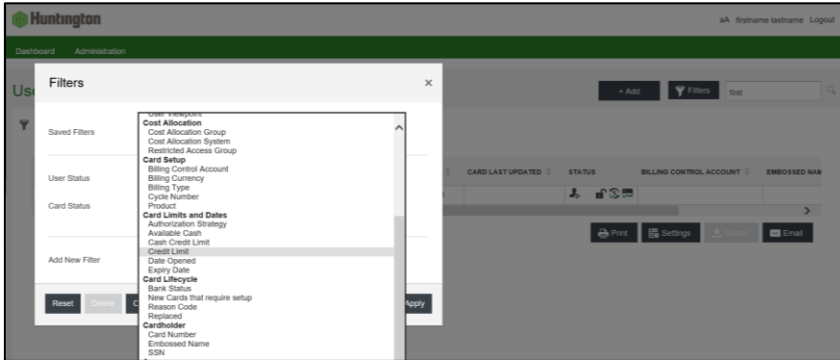
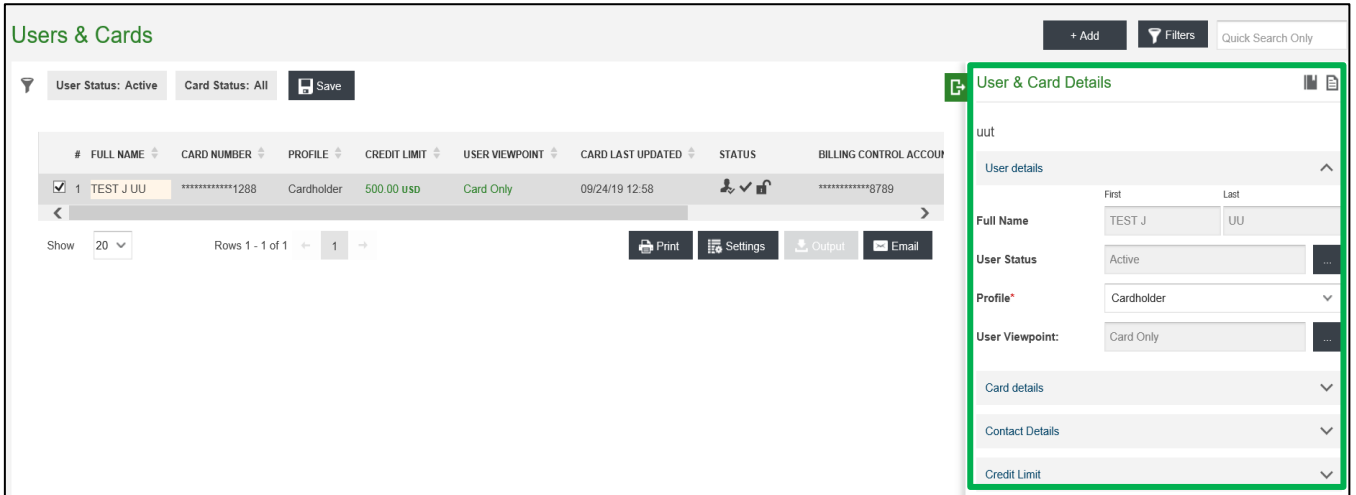
Step	Action
5	Enter all required User details and click Submit. Date of Birth must be entered in YYYYMMDD format. - Select the Cardholder user Profile to assign to the Cardholder. Note that the profile you select will control the type of permissions that the user will have when they access the Card Management user interface. 
6	The Success pop-up box opens, providing you with details on the newly-opened card. Click Close. 
7	You can now maintenance the card with any changes/updates that you would like to complete, including adding Advanced Spending Controls. 



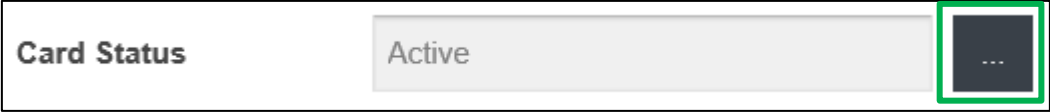
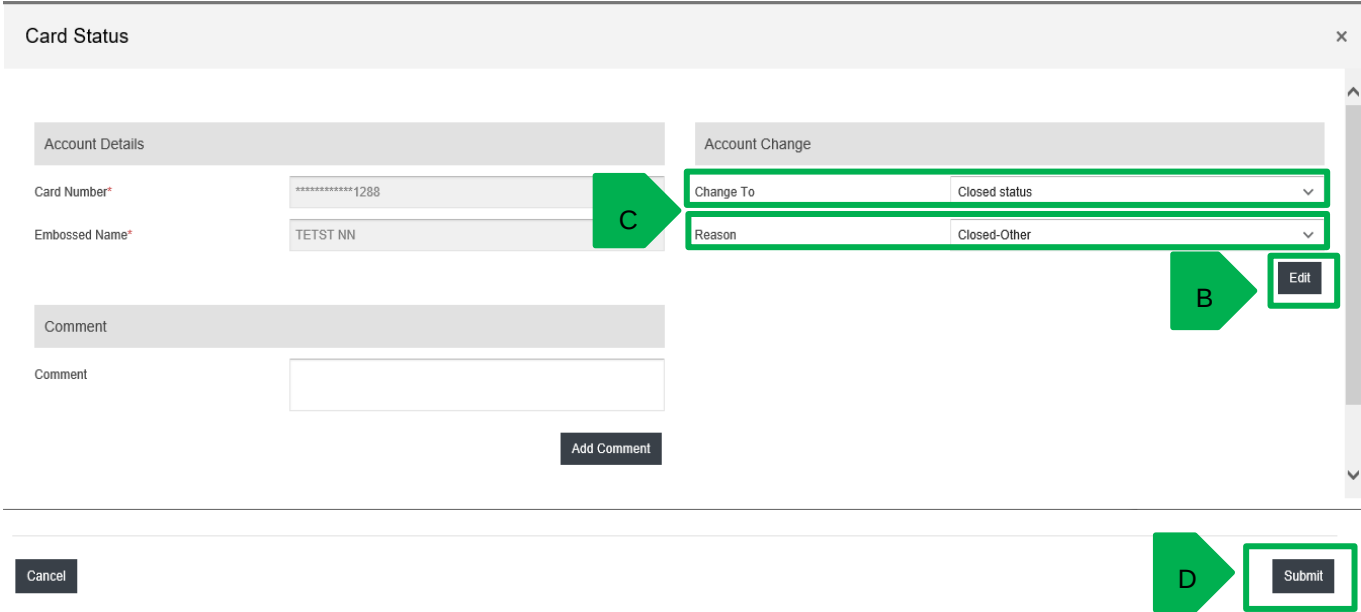
Maintenance an Existing Commercial Credit Card

Step	Action
1	From the Card Management Dashboard, go to Administration > Users & Cards. 
2	The Users & Cards page opens, displaying a list of all of your company's Users and Cardholders. 

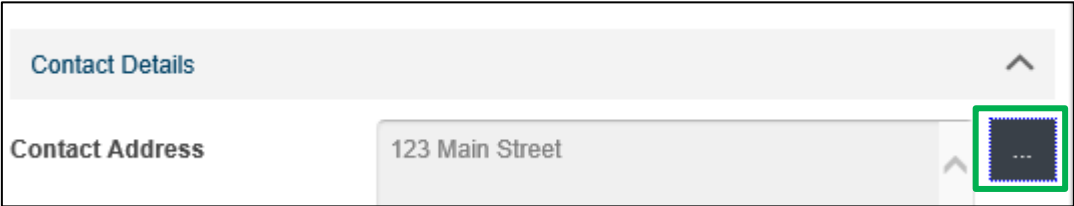
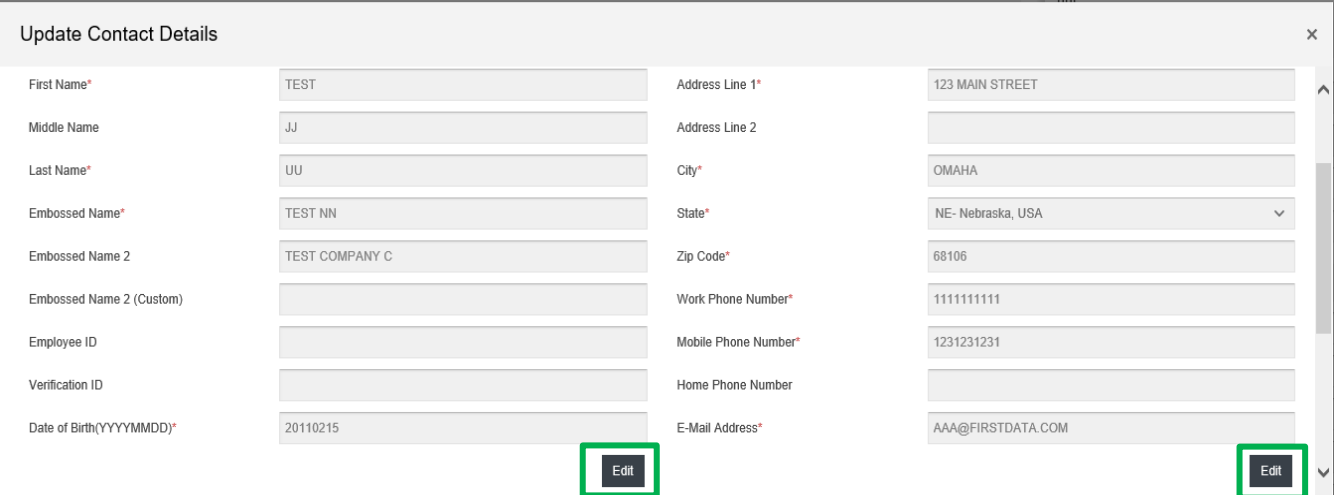
Maintenance an Existing Commercial Credit Card

Step	Action
3	Option 1: For a quick search, input the name of the cardholder in the Quick Search Only field. Click Enter or click on the magnifying glass icon. 
	Option 2: For filter searches, click the Filters button in the top right to quickly pull up a cardholder, or groups of cardholders that share the same data (i.e. credit limit). 
4	Once you've narrowed the list with the Filter, select the desired cardholder you would like to maintenance. You can select the checkbox. A window on the right shows the cardholder's User & Card Details information. 

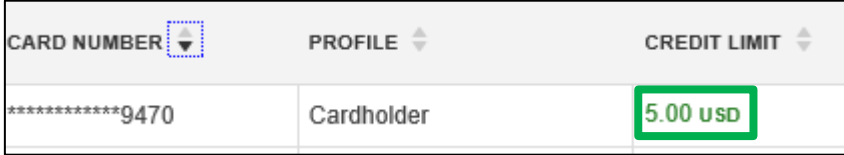
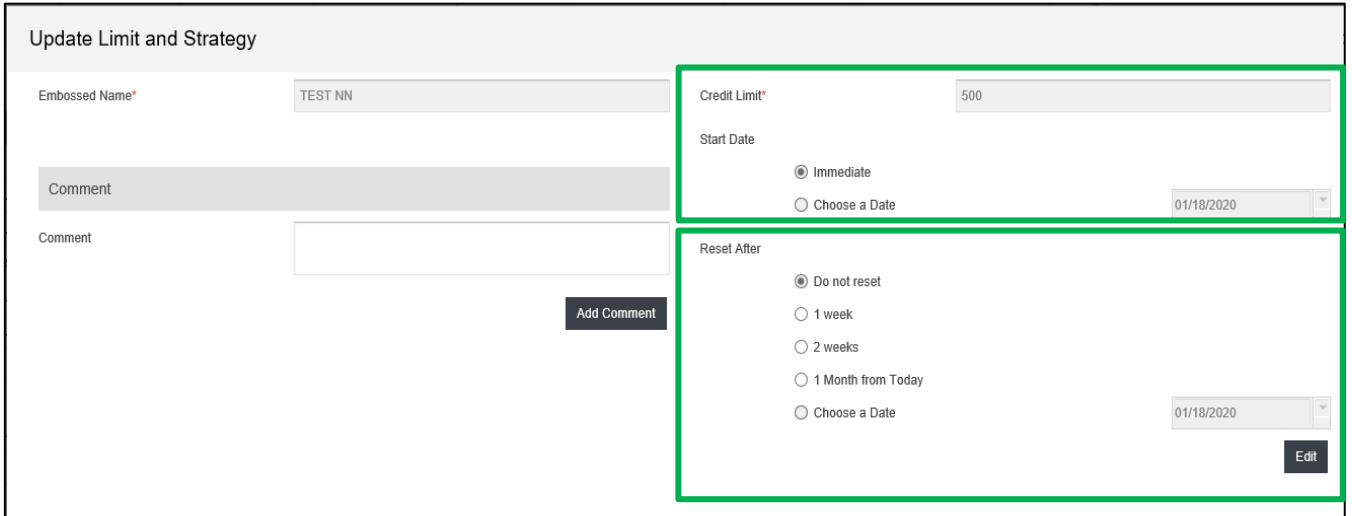
Maintenance an Existing Commercial Credit Card

Step	Action
5	You can maintenance your cardholder by modifying the information in the User & Card Details sub-sections, including User Details, Card Details, Login Details, SSO Details, Contact Details, Credit Limit, and Useful Links. If you prefer, you can view and maintenance the specific cardholder in a full-screen view by clicking the Full Details Panel icon (📄).
6	To close a card: A. Click the Click to Change Card Status button next to Card Status in the Card Details section. The Card Status pop-up box opens.  B. Click Edit. C. Select the Change To and Reason for the account change. D. Click Submit. You will receive a Success message that your details were changed successfully. 

Maintenance an Existing Commercial Credit Card

Step	Action
7	To change the Embossed Name, Embossment Name 2 (Company Name), Employee ID, Verification ID, Date of Birth, Address, Attention To, Phone Numbers, or Email Address for a cardholder, click the Click to Update Contact Details button next to Contact Address in the Contact Details section. The Update Contact Details pop-up box opens.  A. Click either (or both) of the Edit buttons underneath the Account Details and Contact Details sections. B. Make the necessary changes to the cardholder and complete all required fields. C. Click Submit. You will receive a Success message that your details were changed successfully. 

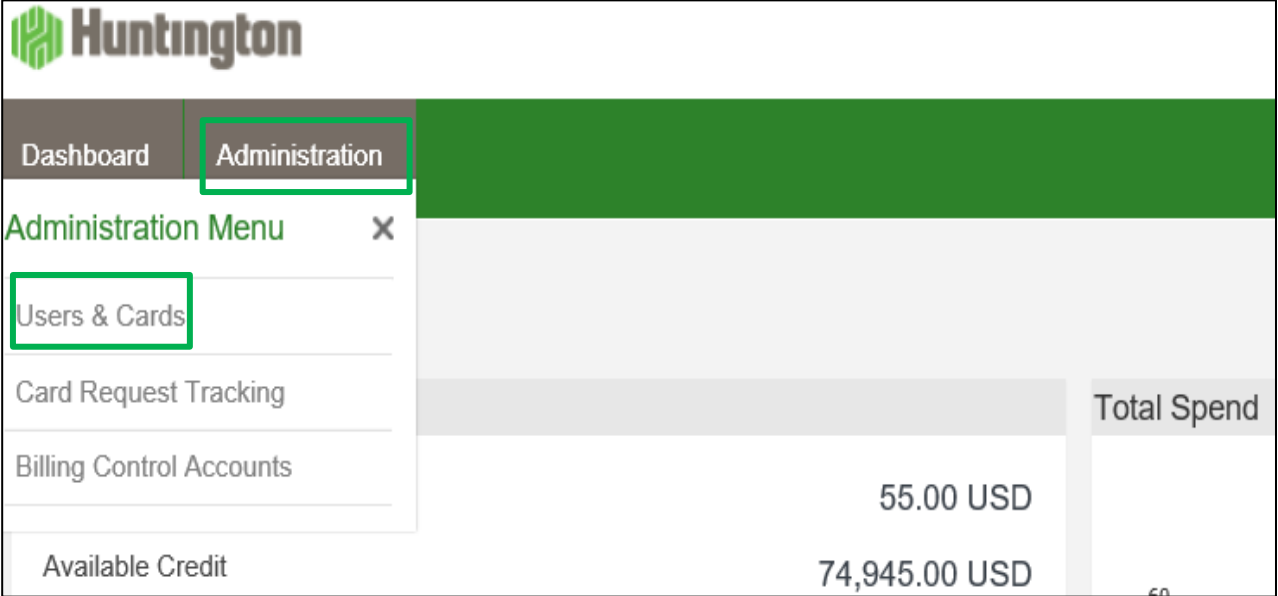
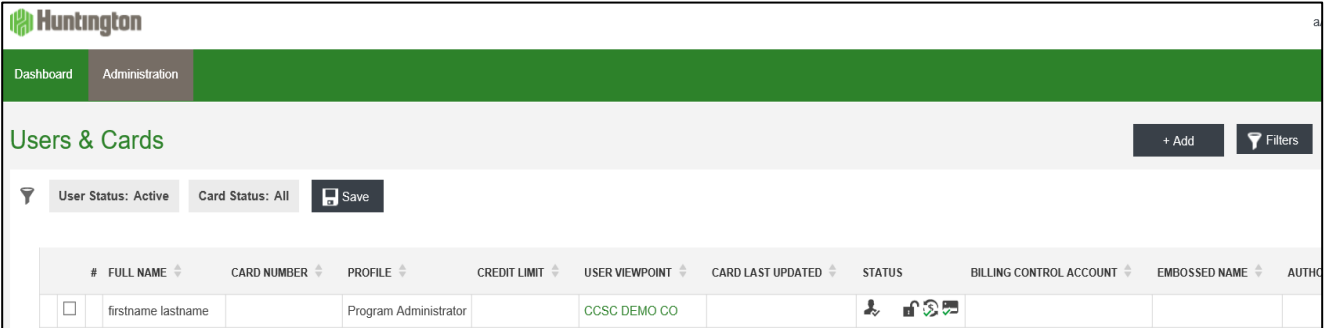
Maintenance an Existing Commercial Credit Card

Step	Action
	Option 1: To change the Credit Limit, set a temporary Credit Limit, or change the Cash Credit Limit, click the Credit Limit link on the Users & Cards screen within the Credit Limit column of the card account. The Update Limit and Strategy pop-up box opens.  Option 2: To change the Credit Limit, set a temporary Credit Limit, or change the Cash Credit Limit, click the Click to Update Credit Limit Strategy button next to Credit Limit in the Credit Limit section. The Update Limit and Strategy pop-up box opens.  A. Click Edit. B. Input the new Cash Credit Limit and/or Credit Limit. For the Credit Limit field: - If the change is permanent, select the Immediate and Do not reset radio buttons. - If the change is temporary, select the amount of time that you would like the new Credit Limit on the card by selecting one of the pre-determined options or choosing a specific date in the future. C. Click Submit. You will receive a Success message that your details were changed successfully. 

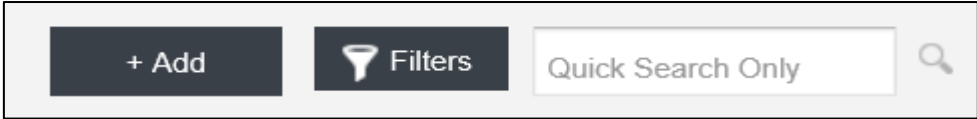
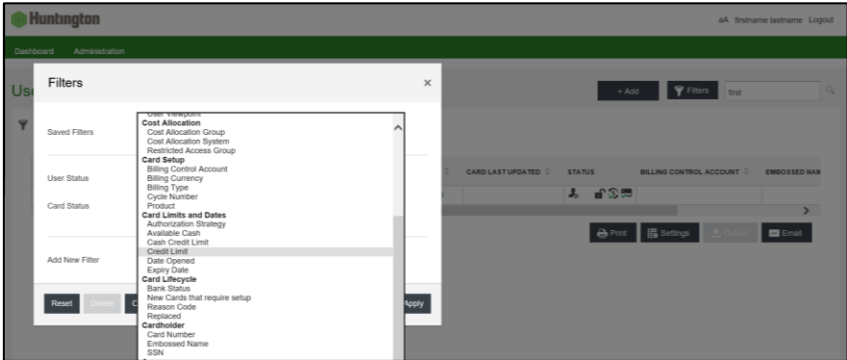
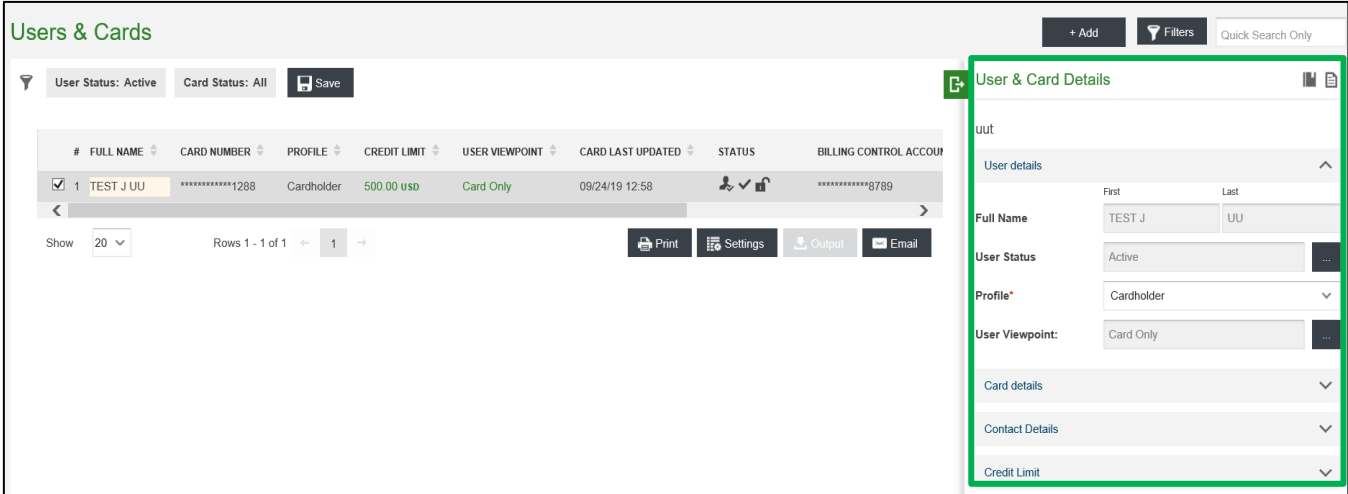
8



View Authorizations/Declines for the Commercial Credit Card

Step	Action
1	From the Card Management Dashboard, go to Administration > Users & Cards. 
2	The Users & Cards page opens, displaying a list of all of your company's Users and Cardholders. 

View Authorizations/Declines for the Commercial Credit Card

Step	Action
3	Option 1: For a quick search, input the name of the cardholder in the Quick Search Only field. Click Enter or click on the magnifying glass icon.  Option 2: For filter searches, click the Filters button in the top right to quickly pull up a cardholder, or groups of cardholders that share the same data (i.e. credit limit). 
4	Once you've narrowed the list with the Filter, select the desired cardholder you would like to view authorizations for. You can select the checkbox or simply click anywhere in the cardholder's row. A window on the right shows the cardholder's User & Card Details information. 

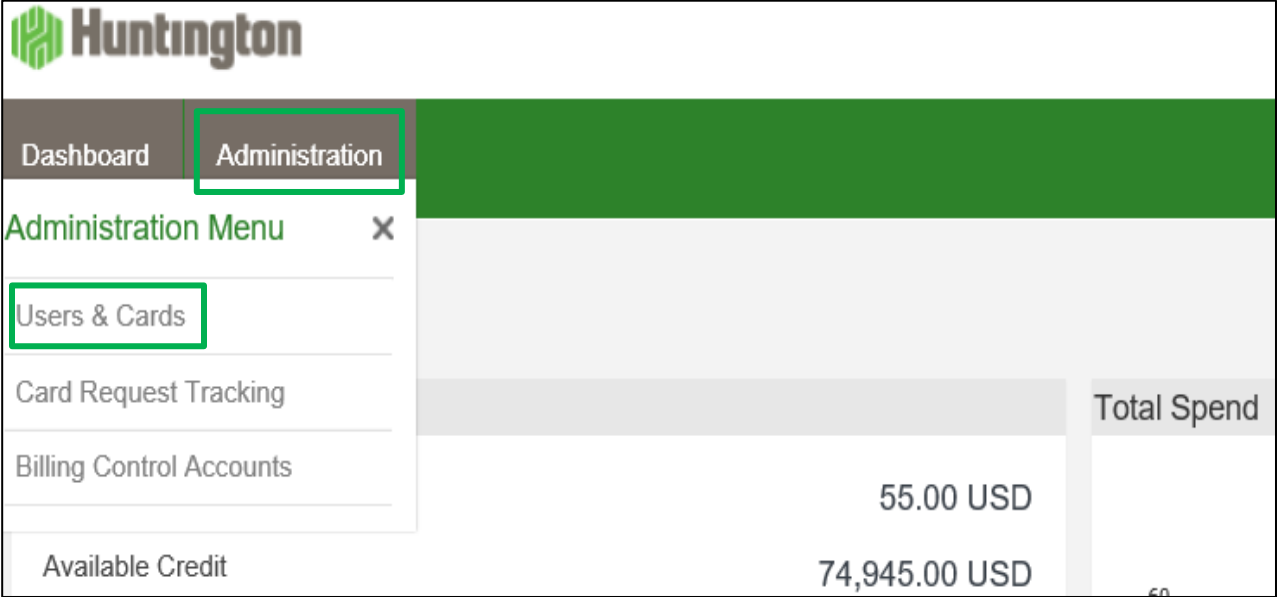
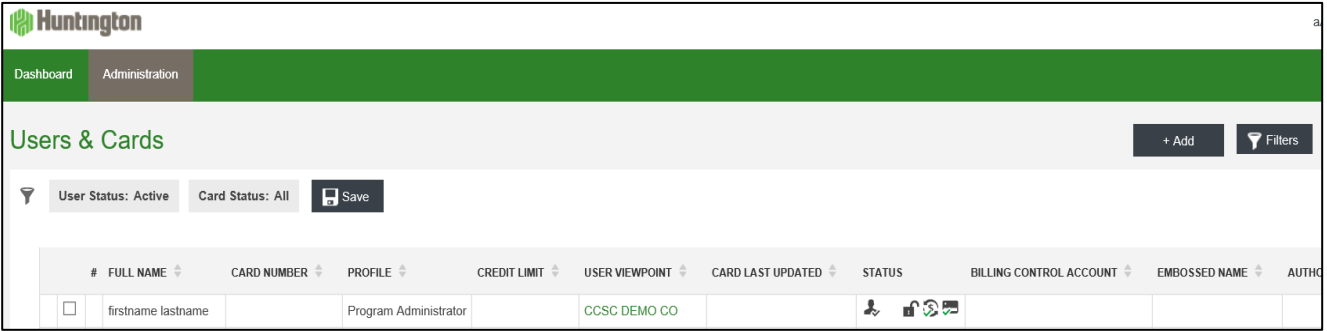
View Authorizations/Declines for the Commercial Credit Card

Step	Action																																																	
5	Scroll to the bottom of the User & Card Details area and click the View Auths and Declines link in the Useful Links section. Useful Links View Auths and Declines Edit User Preferences																																																	
6	The authorizations and declines for the card display. Card-XXXX Available Credit : XXXX USD Current Balance : 0.00 USD <table><tr><th>TRANSACTION DATE</th><th>MERCHANT</th><th>MCC</th><th>AMOUNT</th><th>RESULT</th><th>AUTH/DECLINED CODE</th><th>DECLINE REASON</th></tr><tr><td>01/11/18</td><td>XXXXXXXXXX XXXX XXXX</td><td>0742</td><td>1.25</td><td>AUTH GRANTED</td><td>MA</td><td>[empty]</td></tr><tr><td>01/11/18</td><td>XXXXXXXXXX XXXX XXXX</td><td>5940</td><td>5.23</td><td>AUTH GRANTED</td><td>MA</td><td>[empty]</td></tr><tr><td>01/11/18</td><td>XXXXXXXXXX XXXX XXXX</td><td>5422</td><td>5.23</td><td>AUTH GRANTED</td><td>MA</td><td>[empty]</td></tr><tr><td>01/11/18</td><td>XXXXXXXXXX XXXX XXXX</td><td>3703</td><td>5.23</td><td>AUTH GRANTED</td><td>MA</td><td>[empty]</td></tr><tr><td>01/11/18</td><td>XXXXXXXXXX XXXX XXXX</td><td>3000</td><td>15.23</td><td>AUTH GRANTED</td><td>MA</td><td>[empty]</td></tr><tr><td>01/11/18</td><td>XXXXXXXXXX XXXX XXXX</td><td>0000</td><td>540.00</td><td>OVER LIMIT</td><td>MD</td><td>09-Overlimit</td></tr></table> Print Settings Output	TRANSACTION DATE	MERCHANT	MCC	AMOUNT	RESULT	AUTH/DECLINED CODE	DECLINE REASON	01/11/18	XXXXXXXXXX XXXX XXXX	0742	1.25	AUTH GRANTED	MA	[empty]	01/11/18	XXXXXXXXXX XXXX XXXX	5940	5.23	AUTH GRANTED	MA	[empty]	01/11/18	XXXXXXXXXX XXXX XXXX	5422	5.23	AUTH GRANTED	MA	[empty]	01/11/18	XXXXXXXXXX XXXX XXXX	3703	5.23	AUTH GRANTED	MA	[empty]	01/11/18	XXXXXXXXXX XXXX XXXX	3000	15.23	AUTH GRANTED	MA	[empty]	01/11/18	XXXXXXXXXX XXXX XXXX	0000	540.00	OVER LIMIT	MD	09-Overlimit
TRANSACTION DATE	MERCHANT	MCC	AMOUNT	RESULT	AUTH/DECLINED CODE	DECLINE REASON																																												
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01/11/18	XXXXXXXXXX XXXX XXXX	5422	5.23	AUTH GRANTED	MA	[empty]																																												
01/11/18	XXXXXXXXXX XXXX XXXX	3703	5.23	AUTH GRANTED	MA	[empty]																																												
01/11/18	XXXXXXXXXX XXXX XXXX	3000	15.23	AUTH GRANTED	MA	[empty]																																												
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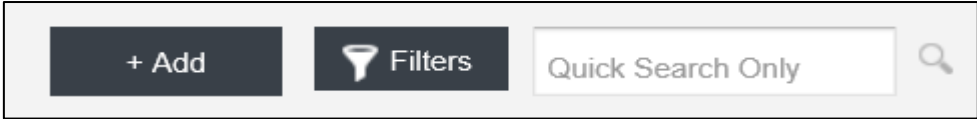
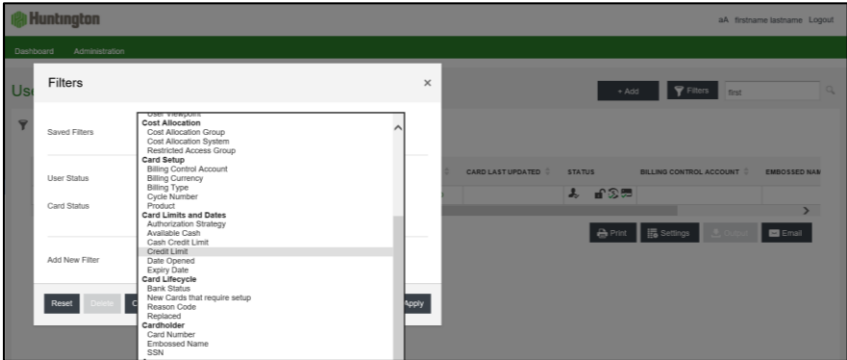
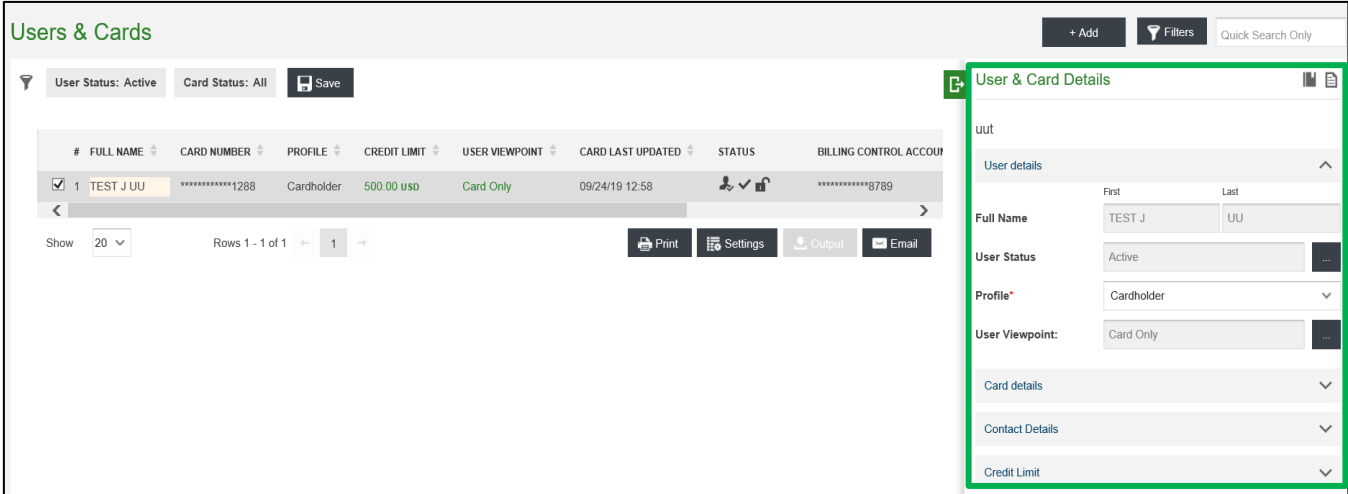


Work with Transaction, Spend, and MCC Controls

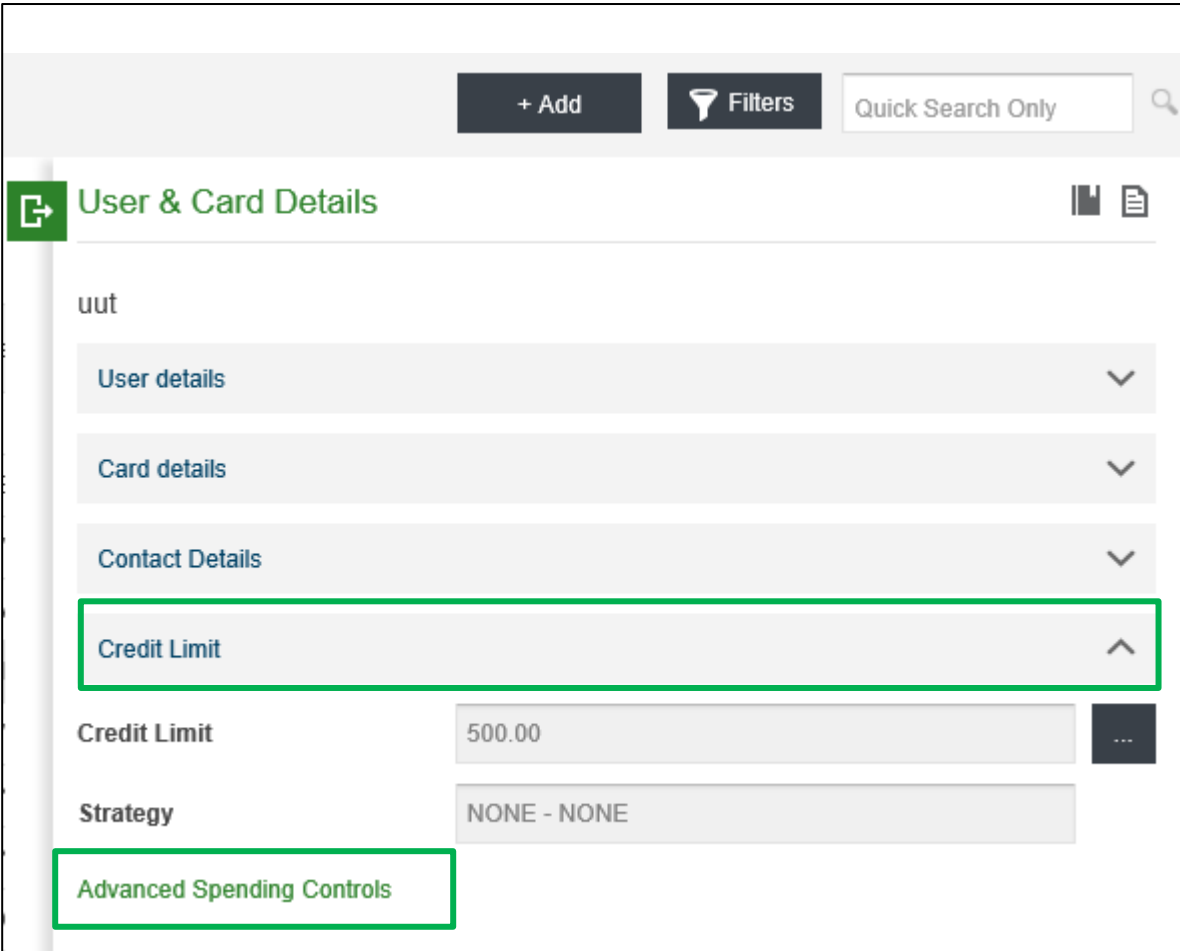
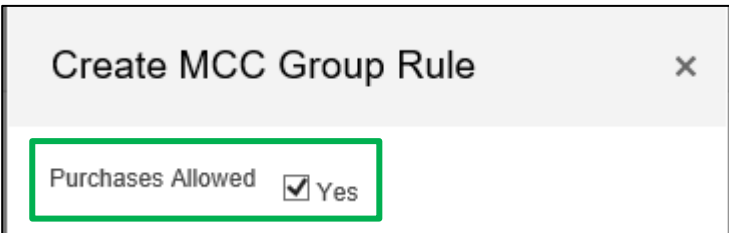
This training guide will provide details on how to set MCC and Spend Restrictions for Cardholders.

Step	Action
1	From the Card Management Dashboard, go to Administration > Users & Cards. 
2	The Users & Cards page opens. 

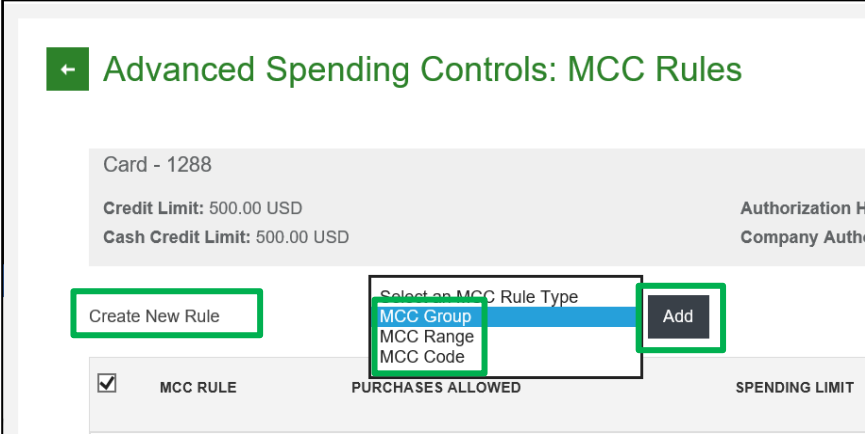
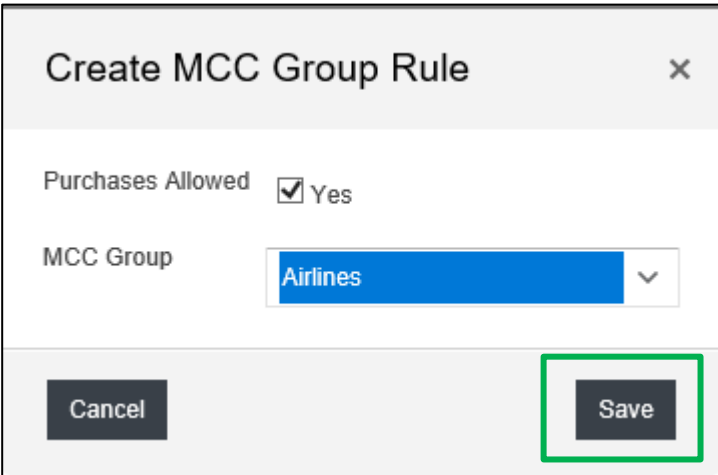
Work with Transaction, Spend, and MCC Controls

Step	Action
3	Option 1: For a quick search, input the name of the cardholder in the Quick Search Only field. Click Enter or click on the magnifying glass icon.  Option 2: For filter searches, click the Filters button in the top right to quickly pull up a cardholder, or groups of cardholders that share the same data (i.e. credit limit). 
4	Once you've narrowed the list with the Filter, select the desired cardholder you would like to set the MCC or Spend Restriction for. You can select the checkbox or simply click anywhere in the cardholder's row. A window on the right shows the cardholder's User & Card Details information. 

Work with Transaction, Spend, and MCC Controls

Step	Action
5	In the User & Card Details window, scroll down, expand the Credit Limit section, and click the Advanced Spending Controls link.  The screenshot shows the 'User & Card Details' window. At the top, there are buttons for '+ Add', 'Filters', and a search bar labeled 'Quick Search Only'. Below these, the 'User & Card Details' section is visible. It contains several expandable sections: 'User details', 'Card details', 'Contact Details', and 'Credit Limit'. The 'Credit Limit' section is expanded, showing a value of 500.00 and a 'Strategy' of NONE - NONE. The 'Advanced Spending Controls' link is highlighted with a green box.
6	 IMPORTANT: To set spend rules, such as number or amount of allowed authorizations per day, you must set an MCC Rule that allows purchases first.  The screenshot shows the 'Create MCC Group Rule' dialog box. It has a title bar with a close button (X). Inside, there is a section labeled 'Purchases Allowed' with a checked checkbox and the text 'Yes'.

Work with Transaction, Spend, and MCC Controls

Step	Action
7	From the Create New Rule menu, select MCC Group, MCC Range, or MCC Code. Then, click Add. 
8	If you select “MCC Group”, select one of the predefined MCC groups that you would like to allow from the MCC Group dropdown. - To allow purchases to this MCC Group, leave the Purchases Allowed box checked. - To decline purchases to this MCC Group, uncheck the Purchases Allowed box. - Click Save. This will add the MCC Rule to this cardholder. 

Work with Transaction, Spend, and MCC Controls

Step

Action

If you select "MCC Range", enter or click  to search for the Start and End codes for the MCC Range. To help narrow the MCC that you would like to start and/or end from, you can select a Merchant Category Group (MCG) from the dropdown. You can also search by the merchant name/description and specific MCC code if you wish. Once selected, click **Apply**.

MCC Code 

MCG

Search 

CODE	DESCRIPTION
3058	Delta
3581	Delta Hotels

Show Rows 1 - 2 of 2+  

Cancel **Apply**

9

- To allow purchases to this MCC Range, leave the **Purchases Allowed** box checked.
- To decline purchases to this MCC Range, uncheck the **Purchases Allowed** box.
- Click **Save**. This will add the MCC Rule to this cardholder.

Create MCC Range Rule 

Purchases Allowed ☒ Yes

Start 

End 

Cancel **Save**

Work with Transaction, Spend, and MCC Controls

Step	Action				
10	If you select "MCC Code", click  to search for the specific MCC that you would like to add. To help narrow the MCC that you would like to set a rule for, you can select a Merchant Category Group (MCG) from the dropdown. You can also search by the merchant name/description and specific MCC code if you wish. Once selected, click Apply. MCC Code × MCG Select MCG Group ▼ Search united 🔍 <table> <tr> <th>CODE</th><th>DESCRIPTION</th></tr> <tr> <td>3000</td><td>United Airlines</td></tr> </table> Show 20 ▼ Rows 1 - 1 of 1+ ◀ 1 ▶ Cancel Apply - To allow purchases to this MCC Code, leave the Purchases Allowed box checked. - To decline purchases to this MCC Code, uncheck the Purchases Allowed box. - Click Save. This will add the MCC Rule to this cardholder. Create MCC Code Rule × Purchases Allowed ☒ Yes MCC Code 3000 ... Cancel Save	CODE	DESCRIPTION	3000	United Airlines
CODE	DESCRIPTION				
3000	United Airlines				

Work with Transaction, Spend, and MCC Controls

Step

Action

12

Once MCC Rules are in place, you can now add spend restrictions to your MCC Rules that are set to “Yes” for “Purchases Allowed.”

Click the checkbox next to the MCC Rule that you would like to create a spend restriction for. Then click the arrow to the right to open the MCC Rule.

← Advanced Spending Controls: MCC Rules

Card - 1288 TETST NN

Credit Limit: 500.00 USD Authorization Hierarchy: Account only

Cash Credit Limit: 500.00 USD Company Authorization Strategy:

Create New Rule MCC Group ▼ Add

☐	MCC RULE	PURCHASES ALLOWED	SPENDING LIMIT	DAY AND HOUR LIMIT	
☐	7801-7801	No			>
☐	3000-3058	No			>
☐	Retail Stores	No			>
☒	9999-9999	Yes			>

Show 20 ▼ Rows 1 - 4 of 4+ ← 1 → Delete Cancel

13

You can edit your existing MCC Rule by clicking the ... button to the right of the MCC Rule and/or by checking or unchecking the **Purchases Allowed** box. To apply any changes, click **Save**.

← Limits for MCC Rule 9999-9999

Card - 1288 TETST NN

Credit Limit: 500.00 USD Authorization Hierarchy: Account only

Cash Credit Limit: 500.00 USD Company Authorization Strategy:

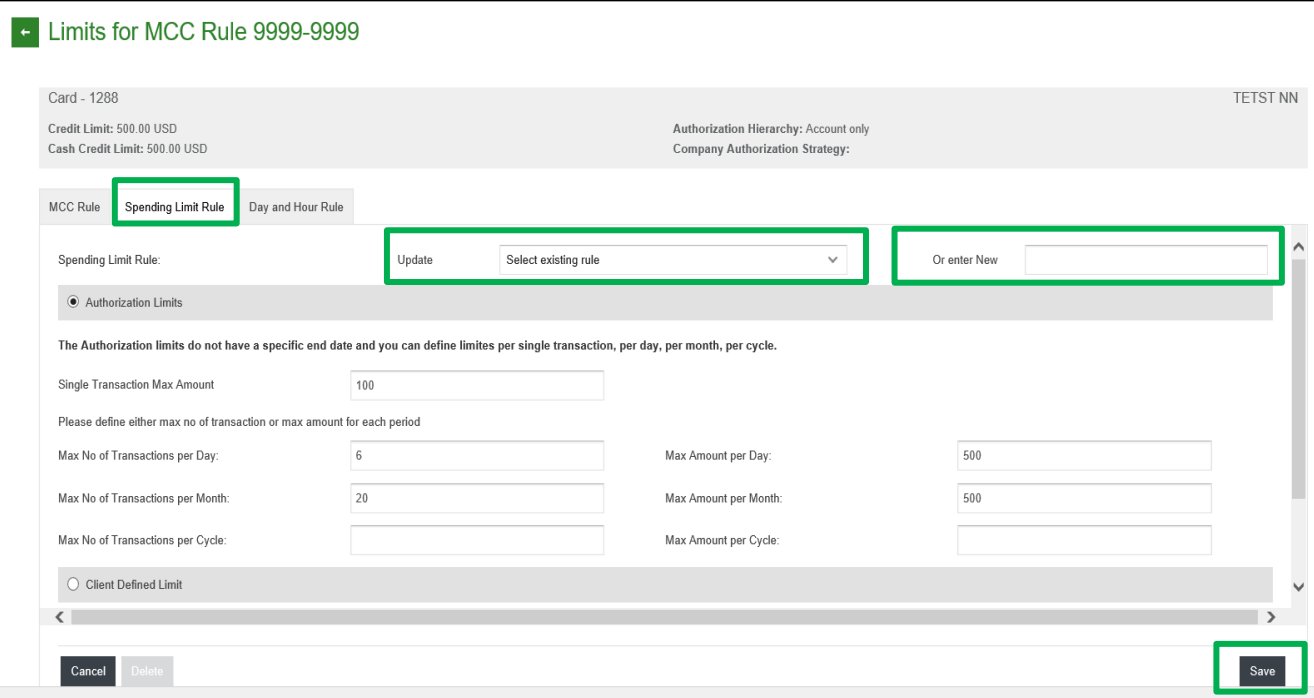
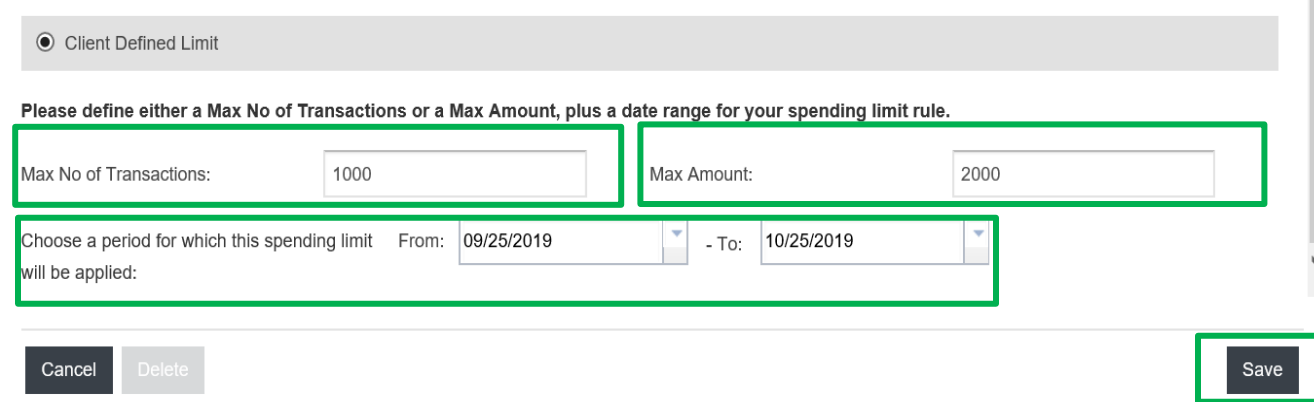
MCC Rule Spending Limit Rule Day and Hour Rule

Purchases Allowed ☒ Yes

MCC Code 9999 ...

Cancel Save

Work with Transaction, Spend, and MCC Controls

Step	Action
14	To set a Spend Limit, switch to the Spending Limit Rule tab. If an existing Spending Limit Rule exists that you would like to assign to this cardholder, select it from the Update dropdown. If no existing rule exists, create a name for the Spending Limit Rule in the Or enter New field. Input the counts and/or amounts that you would like to restrict the cardholder to and click Save. 
15	You also have the option to set a Max Number of Authorizations and Max Amount restriction within a specific date range as defined by you. Enter the number of authorizations and/or amount, and the date range that you would like the spend rule to run from and to. Click Save. 

Work with Transaction, Spend, and MCC Controls

Step

Action

To set a Day and Hour Rule, switch to the **Day and Hour Rule** tab. If an existing Day and Hour Rule exists that you would like to assign to this cardholder, select it from the **Update** dropdown. If no existing rule exists, enter a name for the Spending Limit Rule in the **Or enter New** field.

Click the boxes based on the table of days and/or hours that you would like the cardholder to be declined. To apply your settings, click **Save**.

16

MCC Rule
Spending Limit Rule
Day and Hour Rule

Day and Hour Rule:

Update
Select existing rule

Or enter New

Select the appropriate box below to restrict authorizations for a specific day and hour. Placing a value in a designated hour will result in an account receiving a DECLINE.

All times are **CENTRAL STANDARD TIME**

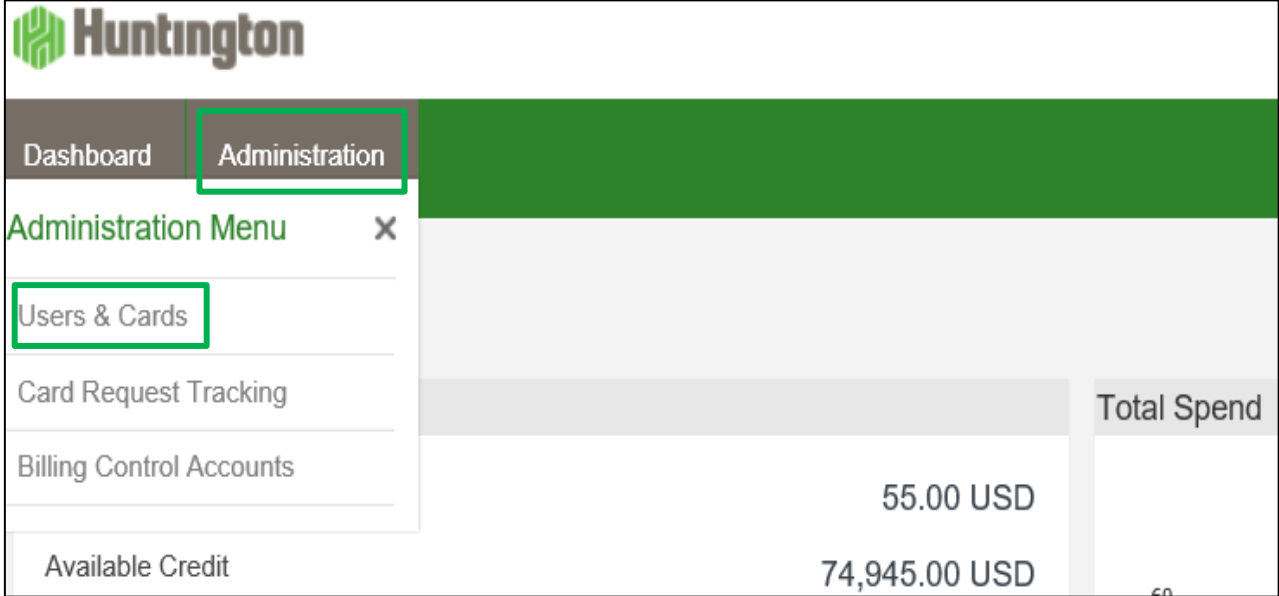
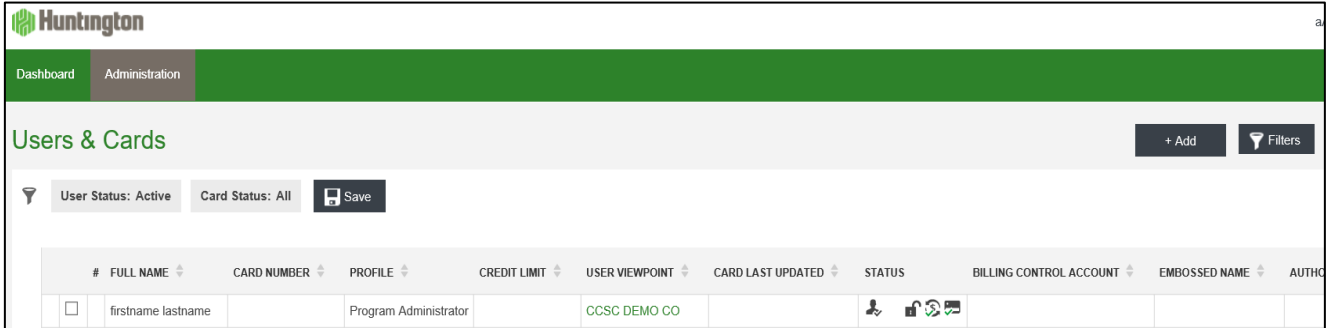
DAY		0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
MONDAY	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
TUESDAY	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
WEDNESDAY	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
THURSDAY	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
FRIDAY	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
SATURDAY	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
SUNDAY	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒

Cancel
Delete
Reset

Save



Adding Travel Notifications

Step	Action
1	From the Card Management Dashboard, go to Administration > Users & Cards. 
2	The Users & Cards page opens, displaying a list of all of your company's Users and Cardholders. 

Step

Action

3

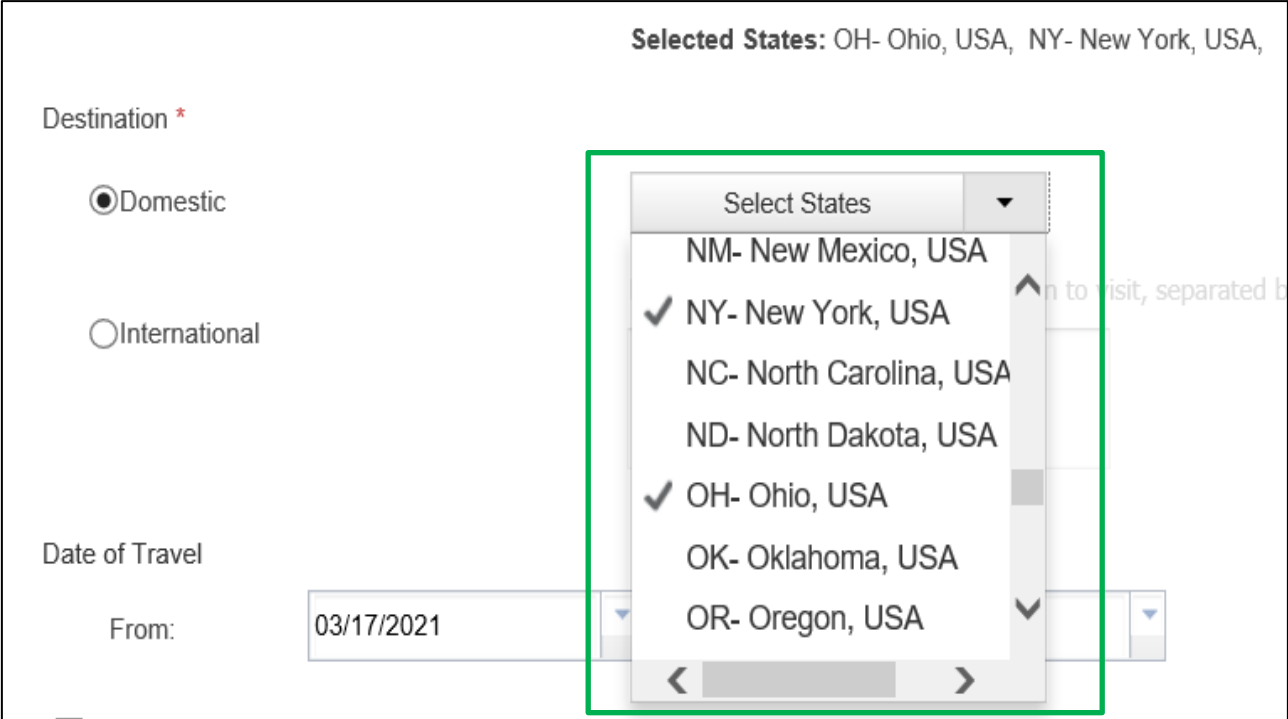
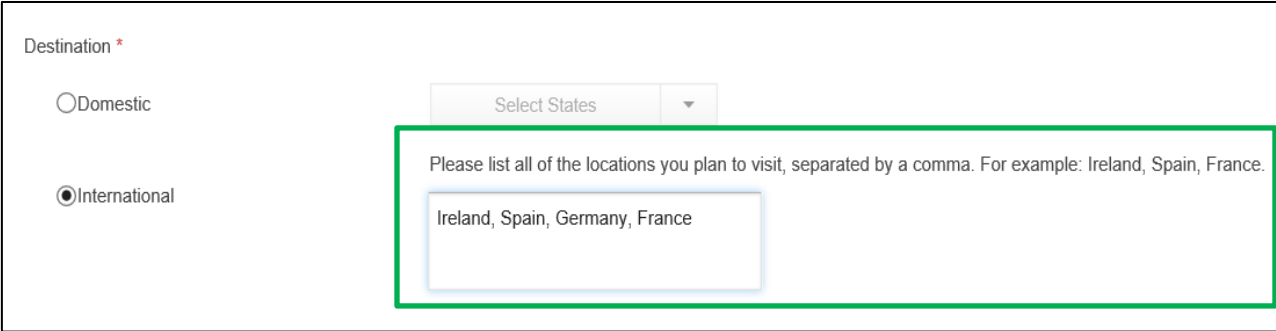
Select the cardholder account that requires the Travel Notification, go to **Useful Links** section under the **User & Card Details** section and click on the **Add/Edit Travel Notification** link.

The screenshot shows the Huntington 'Users & Cards' management interface. At the top, there's a navigation bar with 'Dashboard', 'Transactions', 'Inquiry', and 'Administration'. Below this, the 'Users & Cards' section is active, showing a table of cardholders. The first cardholder, 'FIRST NULL LAST', is selected. A sidebar on the right, titled 'User & Card Details', contains links for 'User details', 'Card details', 'Contact Details', 'Credit Limit', 'Useful Links', 'View Auths and Declines', 'Edit User Preferences', and 'Add/Edit Travel Notification'. The 'Add/Edit Travel Notification' link is highlighted with a green box.

4

On the **Add/Edit Travel Notification** screen, select either “Domestic” or “International” travel.

The screenshot shows the 'Add/Edit Travel Notification' form. The 'Destination' section is highlighted with a green box. It contains two radio buttons: 'Domestic' (selected) and 'International'. To the right of the radio buttons is a 'Select States' button with a dropdown arrow. Below this, there is a text input field with a placeholder message: 'Please list all of the locations you plan to visit, separated by a comma. For example: Ireland, Spain, France.'

Step	Action
5	When selecting "Domestic", users will be required to select from the drop-down menu, the US state(s) that the cardholder will be traveling. Users can select multiple US state locations.  Selected States: OH- Ohio, USA, NY- New York, USA, Destination * ☒ Domestic ☐ International Date of Travel From: 03/17/2021 Select States - NM- New Mexico, USA ✓ NY- New York, USA - NC- North Carolina, USA - ND- North Dakota, USA ✓ OH- Ohio, USA - OK- Oklahoma, USA - OR- Oregon, USA
6	When selecting "International", users will be required to list all international locations (i.e. countries) the cardholder plans to visit, separated by a comma. For example, Ireland, Spain, Germany, France.  Destination * ☐ Domestic ☒ International Select States Please list all of the locations you plan to visit, separated by a comma. For example: Ireland, Spain, France. Ireland, Spain, Germany, France

Step	Action
7	Input the Beginning date and Ending date of travel. Travel Notifications are limited to 30 days. The Beginning date and Ending date cannot be the same. Please set the Ending date to the following day, if necessary. Date of Travel From: 03/17/2021 - To: 03/18/2021 ☐ Remove Travel Notification
8	To cancel a Travel Notification on an account, click the Remove Travel Notification box and then click the Submit button. Date of Travel From: 03/17/2021 - To: 03/18/2021 ☒ Remove Travel Notification

Step

Action

Program Administrators can view accounts with a current Travel Notification by viewing an airplane icon on the cardholder's account via the Users & Cards screen.

9

Users & Cards + Add Filters Quick Search Only

User Status: Active Card Status: All Travel Notification Applied: Yes X Save

#	FULL NAME	CARD NUMBER	PROFILE	AVAILABLE CREDIT	CREDIT LIMIT	CARD LAST UPDATED	STATUS	BILLING CONTROL
☐ 1	JANE SMITH	*****6486	Cardholder	2,000.00 USD	2,000.00 USD	03/20/21 05:00		*****4615

Program Administrators can also view accounts with a current Travel Notification by clicking the Filters button in the top right and selecting the filter entitled "Travel Notification Applied". This will provide a list of cardholders that share the same data (i.e. Travel Notification Applied on account).

10

Filters X

Saved Filters Select Pre-saved Filter

User Status Active

Card Status All

Travel Notification Applied Yes X

Add New Filter Select Filter Type



Order A Replacement Card

Step

Action

From the Card Management Dashboard, go to **Administration > Users & Cards**.

1

Huntington

Dashboard Administration

Administration Menu X

Users & Cards

Card Request Tracking

Billing Control Accounts

Available Credit

Total Spend

55.00 USD

74,945.00 USD

The **Users & Cards** page opens, displaying a list of all of your company's Users and Cardholders.

2

Huntington

Dashboard Transactions Inquiry Administration

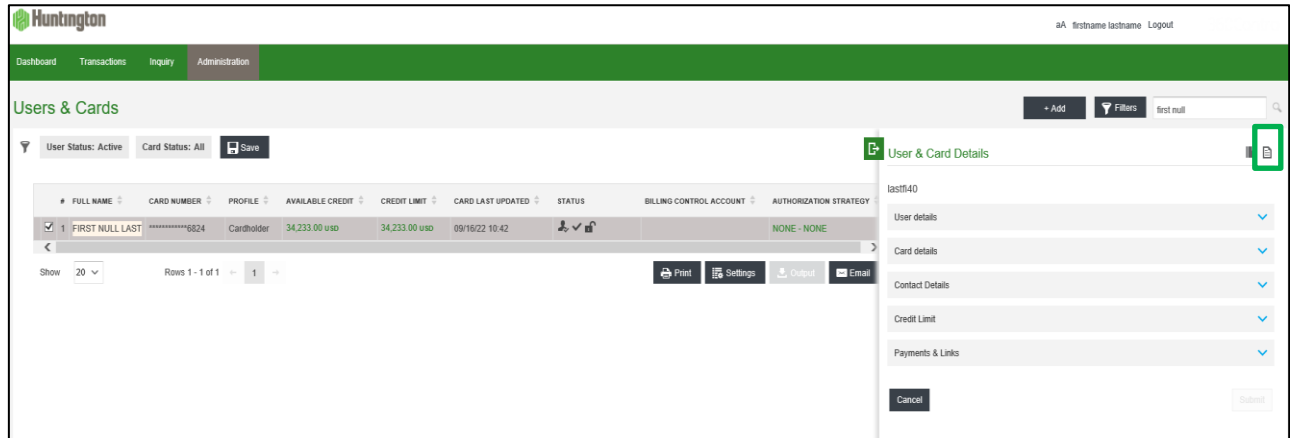
Users & Cards + Add

User Status: Active Card Status: All Save

#	FULL NAME	CARD NUMBER	PROFILE	AVAILABLE CREDIT	CREDIT LIMIT	CARD LAST UPDATED	STATUS	BILLING CONTROL ACCOUNT
1	TESTA 01142020	*****2203	Cardholder	50,000.00 USD	50,000.00 USD	08/03/22 10:10	✓	*****8789
1	TESTD 01142020	*****1974	Cardholder	500.00 USD	500.00 USD	07/08/22 10:21	✓	*****8789
1	TESTF 01172020	*****9606	Cardholder	8,000.00 USD	8,000.00 USD	07/08/22 10:21	✓	*****8789
1	TEST 01222020	*****2691	Cardholder	200.00 USD	200.00 USD	07/08/22 10:21	✓	*****8789
1	TEST2 01222020	*****6782	Cardholder	300.00 USD	300.00 USD	07/08/22 10:21	✓	*****8789
1	TEST CARD45151	*****6676	Cardholder	5,412.00 USD	5,412.00 USD	05/05/22 10:15	✓	

Select the cardholder account that requires the Card Replacement, go under the **User & Card Details** section and click on the **Full Details Panel** icon.

3

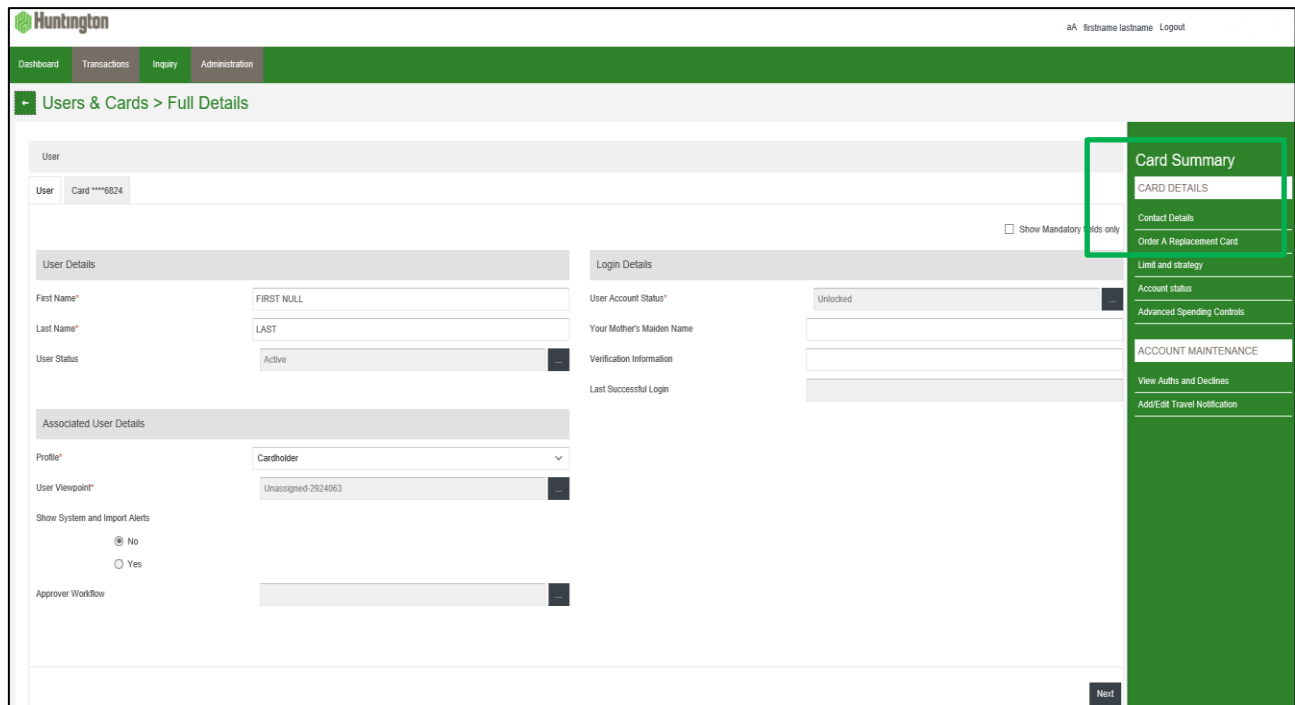


The screenshot shows the Huntington 'Users & Cards' management interface. At the top, there's a navigation bar with 'Dashboard', 'Transactions', 'Inquiry', and 'Administration'. Below this, the 'Users & Cards' section is active, showing a table of users. The 'User & Card Details' panel is open on the right, displaying a list of card details. The 'Full Details Panel' icon is highlighted with a green box.

#	FULL NAME	CARD NUMBER	PROFILE	AVAILABLE CREDIT	CREDIT LIMIT	CARD LAST UPDATED	STATUS	BILLING CONTROL ACCOUNT	AUTHORIZATION STRATEGY
1	FIRST NULL LAST	*****6824	Cardholder	34,233.00 USD	34,233.00 USD	09/16/22 10:42	Unlocked	NONE - NONE	NONE - NONE

Under the **Card Summary** section, click on **Order A Replacement Card** link.

4



The screenshot shows the Huntington 'Users & Cards' management interface, specifically the 'Full Details' panel. The 'Card Summary' section is open on the right, displaying a list of card details. The 'Order A Replacement Card' link is highlighted with a green box.

Card Summary
CARD DETAILS
Contact Details
Order A Replacement Card
Limit and strategy
Account status
Advanced Spending Controls
ACCOUNT MAINTENANCE
View Auths and Declines
Add/Edit Travel Notification

Select the shipping option (standard or expedited) and then click the **Submit** button.

Ordering a replacement card will deactivate the current card in-hand immediately.

5

Huntington aA first name last

Card - 2672 TEST ACCOUNT

Use this page to replace a damaged or broken card.

Your current card will be deactivated.

Do not order a replacement card, if this account has been lost or stolen.

For lost or stolen accounts, please call us at (800) 480-4862, option 7, option 1.

Current Account Details	Shipping Method
Card Number* *****2672 Embossed Name TEST ACCOUNT Address Line 1 123 SMILE STREET Address Line 2 City COLUMBUS State/Province OH Postal Code 43228	Shipping Option * ☒ Standard Free Shipping 3-5 business days ☐ Expedited \$30 Fee 2-3 business days

Comment

Comment

Add Comment

Cancel Submit

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