



## **Company Administrator Guide**

[ezbusinesscardmanagement.com](http://ezbusinesscardmanagement.com)

**FOR SUPPORT-RELATED INQUIRIES**

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**MONDAY–FRIDAY, 8:00 a.m.–6:00 p.m. CT**

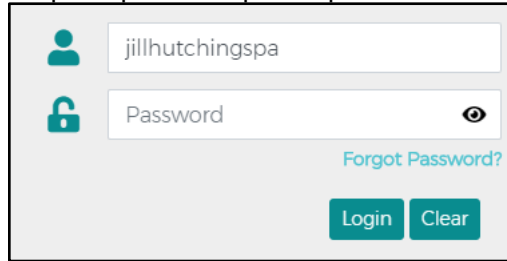
**PAYMENT  
SOLUTIONS**

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## LOGIN PROCESS

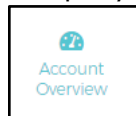
Login with username (email address) & temporary password. First time users will be prompted to update password on initial login.



A login form with a light gray background. At the top left is a teal person icon. To its right is a text input field containing the email address 'jillhutchingspa'. Below the email field is a teal padlock icon. To its right is a password input field with the placeholder text 'Password' and a teal eye icon for toggling visibility. Below the password field is a teal link that says 'Forgot Password?'. At the bottom of the form are two teal buttons: 'Login' and 'Clear'.

## LISTING OF ACCOUNTS

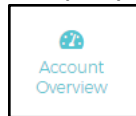
**Step 1:** From the home screen, choose Account Overview from Quick Links **OR** from your company hierarchy screen, select  under Actions.



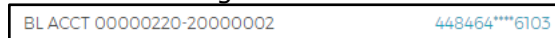
**NOTE:** To include Virtual Accounts, check the box next to Virtual Accounts in the top right.

## VIEW COMPANY CREDIT LIMIT

**Step 1:** From the home screen, choose Account Overview from Quick Links **OR** from your company hierarchy screen, select  under Actions.

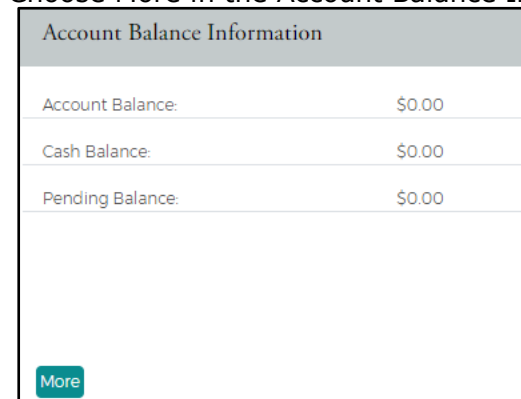


**Step 2:** Select the Billing Account.



A rectangular box with a light gray background. It contains the text 'BL ACCT 00000220-20000002' on the left and '448464\*\*\*\*6103' on the right.

**Step 3:** Choose More in the Account Balance Information section.



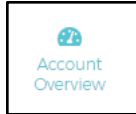
Account Balance Information	
Account Balance:	\$0.00
Cash Balance:	\$0.00
Pending Balance:	\$0.00

More

Account Balance Summary will include the current company balance and the credit limit.

## PENDING AUTHORIZATIONS AND DECLINES

**Step 1:** From the home screen, choose Account Overview from Quick Links **OR** from your company hierarchy screen, select  under Actions.



**Step 2:** Select the Billing Account.

BL ACCT 00000220-20000002	448464***6103
---------------------------	---------------

**Step 3:** Choose More in the Account Balance Information section.


Account Balance Information	
Account Balance:	\$0.00
Cash Balance:	\$0.00
Pending Balance:	\$0.00
<a href="#">More</a>	

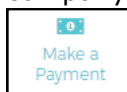
**Step 4:** Select View Pending Balance to view current authorizations or Declined Transactions to view current declines.


Pending Balance:	\$0.00 <a href="#">View Pending Balance</a> <a href="#">Declined Transactions</a>
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# PAYMENTS

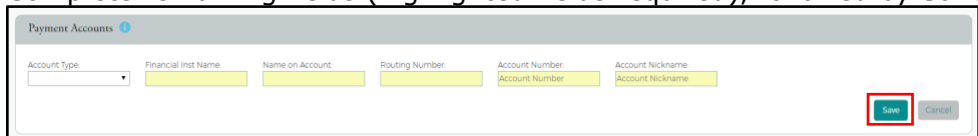
## ADD A PAYMENT ACCOUNT

**Step 1:** From the home screen, choose Make a Payment from Quick Links **OR** from company hierarchy screen, select  under Actions.




**Step 2:** Choose  in the bottom right to add a payment account.

**Step 3:** Complete remaining fields (highlighted fields required), followed by Save.

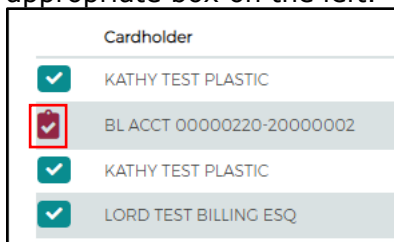


## MAKE A PAYMENT


**Step 1:** From the home screen, choose Make a Payment from Quick Links **OR** from company hierarchy screen, select  under Actions.



For **consolidated billing**, select the **Billing Account** by checking the appropriate box on the left.




For **individual billing**, choose the account by checking the appropriate box on the left of the account you wish to make a payment.

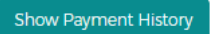
**Step 2:** Choose .

**Step 3:** Complete the fields listed, including the email address to send a confirmation, followed by Pay.  
**Note:** Payments submitted after 5:00 p.m. ET will be credited to your account on the following business day.


## VIEW PAYMENT HISTORY

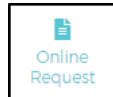
**Step 1:** From the home screen, choose Make a Payment from Quick Links **OR** from company hierarchy screen, select  under Actions.



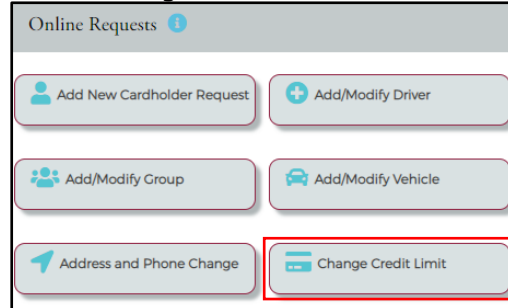
**Step 2:** Choose  from the bottom right.

## UPDATE CREDIT LIMIT

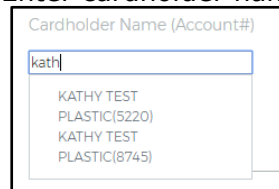
**Step 1:** From the home screen, choose Online Request from Quick Links **OR** from the Company Hierarchy screen, select  under Actions.



**Step 2:** Select Change Credit Limit from Online Requests.



**Step 3:** Enter cardholder name or last four of account number.




**Step 4:** Complete remaining fields: memo, request type and new credit limit, followed by Submit for **permanent limit** updates.

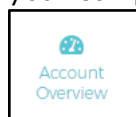
Cardholder Name (Account#)	Memo	Request Type	New Credit Limit
KATHY TEST PLASTIC (5220)	test	Permanent Credit Lin	10000
	Updated On: 12/31/1899 06:00 PM	Current Credit Limit: \$100	Last Permanent Credit Limit: \$0
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>			


**Step 5:** For **temporary limit** updates, choose Temporary Credit Limit from the request type drop down, choose the **amount to increase the limit by** and the expiration on that temporary increase, followed by Submit.

Cardholder Name (Account#)	Memo	Request Type	New Credit Limit	Expiration Date
KATHY TEST PLASTIC (5220)	test	Temporary Credit Lim	Credit Limit increased	mm/dd/yyyy
Updated By:	Updated On: 12/31/1899 06:00 PM	Temporary Adjusted Credit Limit: \$	Last Temporary Credit Limit: \$0	Last Temporary Expiry Date: 12/31/1899 06:00 PM
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>				

**Updates can also be made from the account listing screen.**

**Step 1:** From the home screen, choose Account Overview from your Quick Links **OR** from your company hierarchy screen, select  under Actions

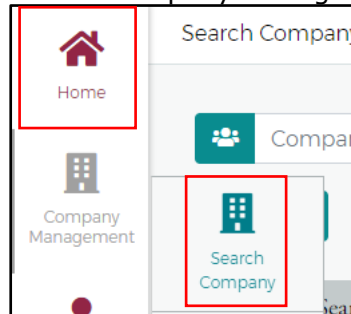




**Step 2:** Select  next to the credit limit and refer to steps above.

## ADD NEW ACCOUNT

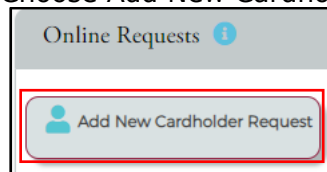
*To ensure account is created on the correct billing account, follow the instructions below.*

**Step 1:** Choose Company Management, followed by Search Company



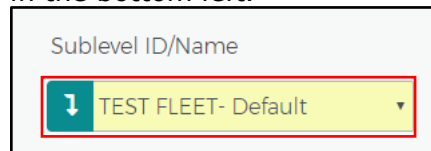
**Step 2:** Select View Hierarchy  under Actions **OR** from the Company Hierarchy screen, select  under Actions.

**Step 3:** Choose Add New Cardholder Request under Online Requests.



**Ensure you select the correct Sublevel ID/Name. This is the billing account you wish the new account to roll into.**

**Step 4:** Complete the remaining required fields highlighted in yellow, followed by Submit in the bottom left.




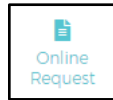
Notes:

- For Type Processing, choose 50 – Corporate Account.
- If utilizing custom plastics, submit requests for new cards to **CommercialCards@htlfcp.com**. Please indicate in that communication the use of custom plastics.
- Please allow 7-10 business days for new cards to arrive.

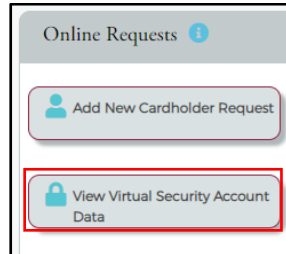
# VIRTUAL CARDS

## VIEW ACCOUNT INFORMATION

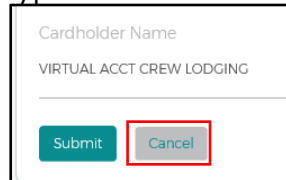
**Step 1:** From the home screen, choose Online Request from Quick Links **OR** from the Company Hierarchy screen, select  under Actions.




**Step 2:** Select View Virtual Security Account Data.

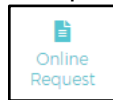


**Step 3:** Type the name of the account under Cardholder Name, followed by Submit.

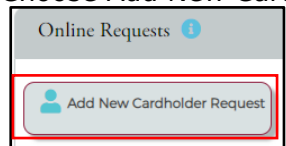


## ORDER NEW VIRTUAL ACCOUNT

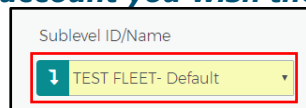
**Step 1:** From the home screen, choose Online Request from Quick Links **OR** from the Company Hierarchy screen, select  under Actions.



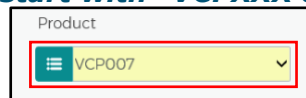
**Step 2:** Choose Add New Cardholder Request under Online Requests.



**Step 3:** **Ensure you select the correct Sublevel ID/Name. This is the billing account you wish the new account to roll into.**




**Step 4:** **Next, ensure you select the correct Product. The Virtual Card product will start with "VCPXXX or VCBXXX"**

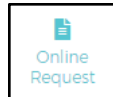


**Step 5:** Complete the remainder of the form, including all required fields highlighted in yellow, followed by Submit. The Virtual Card information can be accessed immediately by following the steps above.

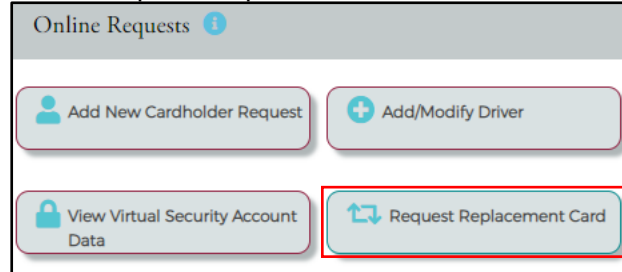


## REQUEST REPLACEMENT CARD

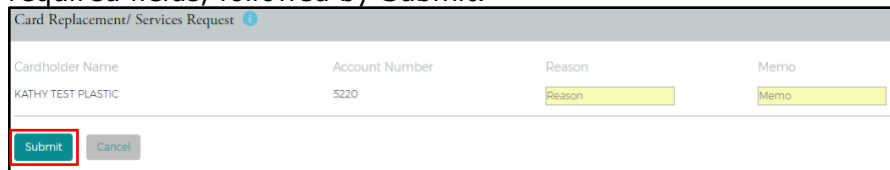
**Step 1:** From the home screen, choose Online Request from Quick Links **OR** from the Company Hierarchy screen, select  under Actions.



**Step 2:** Select Request Replacement Card from Online Requests.




**Step 3:** Enter the cardholder name for replacement, and complete the highlighted required fields, followed by Submit.

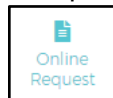
A screenshot of the "Card Replacement/ Services Request" form. It has a table with columns: Cardholder Name, Account Number, Reason, and Memo. The "Reason" and "Memo" fields are highlighted in yellow. Below the table are "Submit" and "Cancel" buttons. The "Submit" button is highlighted with a red border.

Cardholder Name	Account Number	Reason	Memo
KATHY TEST PLASTIC	5220	Reason	Memo

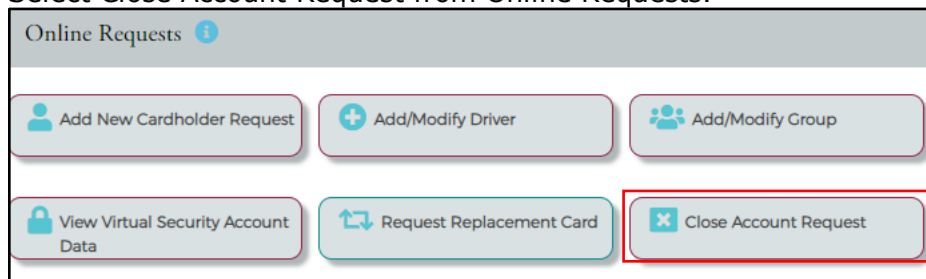
**Note:** Please allow 7-10 business days for new plastics to arrive.

## CLOSE ACCOUNT

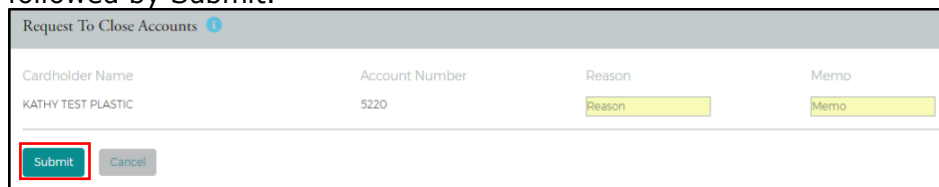
**Step 1:** From the home screen, choose Online Request from Quick Links **OR** from the Company Hierarchy screen, select  under Actions.



**Step 2:** Select Close Account Request from Online Requests.




**Step 3:** Enter the account name to close, and complete the highlighted required fields, followed by Submit.

A screenshot of the "Request To Close Accounts" form. It has a table with columns: Cardholder Name, Account Number, Reason, and Memo. The "Reason" and "Memo" fields are highlighted in yellow. Below the table are "Submit" and "Cancel" buttons. The "Submit" button is highlighted with a red border.

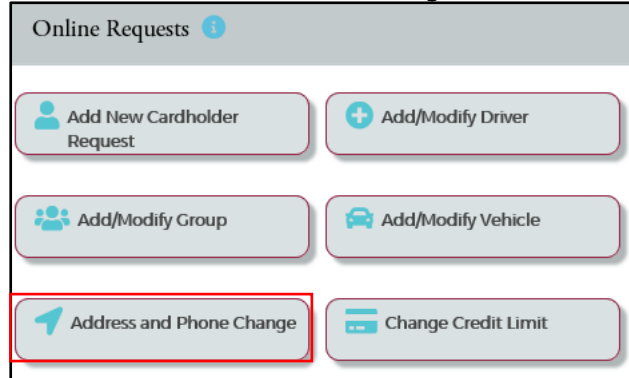
Cardholder Name	Account Number	Reason	Memo
KATHY TEST PLASTIC	5220	Reason	Memo

# UPDATE CARDHOLDER CONTACT INFORMATION

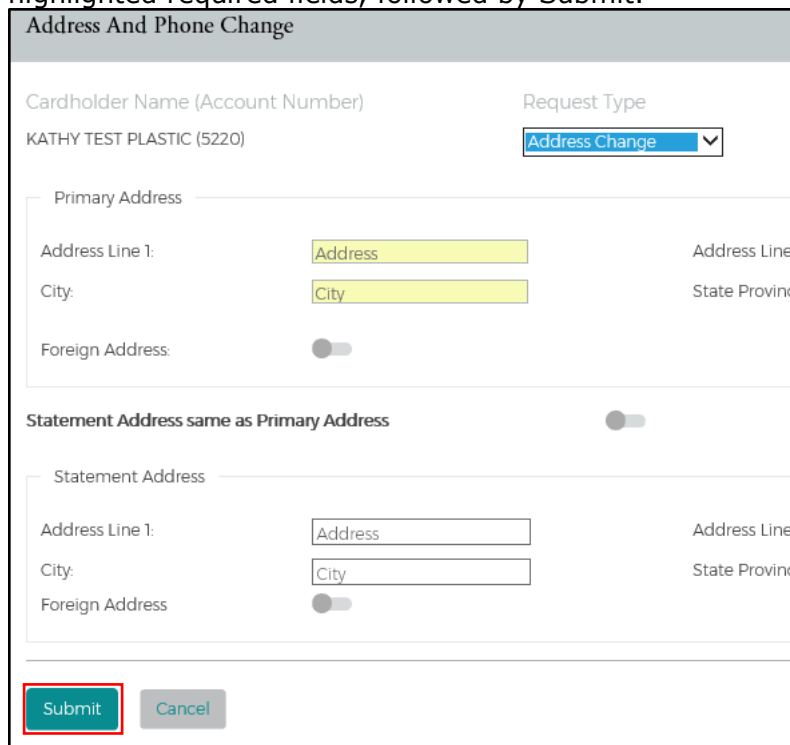
**Step 1:** From the home screen, choose Online Request from Quick Links **OR** from the Company Hierarchy screen, select  under Actions.



**Step 2:** Select Address and Phone Change from Online Requests.

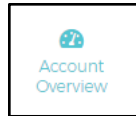


**Step 3:** Enter the cardholder account to update, request type and complete the remaining highlighted required fields, followed by Submit.

A screenshot of the "Address And Phone Change" form. The form includes fields for "Cardholder Name (Account Number)" (KATHY TEST PLASTIC (5220)), "Request Type" (Address Change), "Primary Address" (Address Line 1, City, State/Province), "Foreign Address" (toggle), "Statement Address same as Primary Address" (toggle), and "Statement Address" (Address Line 1, City, State/Province). The "Address" and "City" fields in the Primary Address section are highlighted in yellow. The "Submit" button is highlighted with a red border.

## ENROLL A CARDHOLDER IN EZCARD

**Step 1:** From the home screen, choose Account Overview from your Quick Links **OR** from your company hierarchy screen, select **9** under Actions.



**Step 2:** Select the Account to enroll.



**Step 3:** Select More in the User Enrollment Details box.

A box titled "User Enrollment Details" containing the following information:

User Enrollment Status / User Activity:	Not Enrolled
User Account Status(Locked / Unlocked):	Unlocked
User Profile Status(Locked / Unlocked):	Unlocked

A "More" button is located at the bottom left of the box.

**Step 4:** Select **9** under actions of User Enrollment Status / User Activity.

Activity	Status	Last Activity Date	Actions
User Enrollment Status / User Activity	Not Enrolled		

**Step 5:** Complete the form, followed by Confirm to complete enrollment.

A form titled "User Enrollment Details" with the following fields:

- Back To Enrollment Details (link)
- User Enrollment (header)
- Expiration Date:
- Email Address 1:
- Confirm Email Address:
- Select Username:
- Temporary Password:
- Confirm Temporary Password:
- Password Strength:

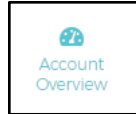
At the bottom, there are "Confirm" and "Clear" buttons. The "Confirm" button is highlighted with a red box.

**Note:** The expiration date must match the expiration date on the account. The detail box to the left lists the expiration date.

A detail box showing "Expiration Date: 06/2023".

# RESET A CARDHOLDER'S PASSWORD OR UNLOCK A USER FOR EZCARD

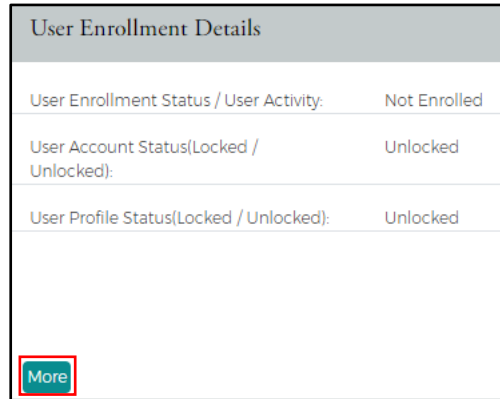
**Step 1:** From the home screen, choose Account Overview from Quick Links **OR** from your company hierarchy screen, select  under Actions.











**Step 2:** Select the Account to update password or unlock.




**Step 3:** Select More in the User Enrollment Details box.

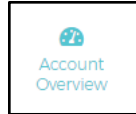


**Step 4:** Choose  to the right of Password Failures / Generate New Password to update. If user is locked out, select  to unlock.

Activity	Status	Last Activity Date	Actions
User Enrollment Status / User Activity	Enrolled	08/19/2019	
User Security Status (RSA)	Unlocked		
Security Inactivity Lock	No	01/01/0001	
Password Failures / Generate New Password	0		
User Account Status(Locked / Unlocked)	Unlocked		
User Profile Status(Locked / Unlocked)	Unlocked		

## EMULATE A USER IN EZCARD

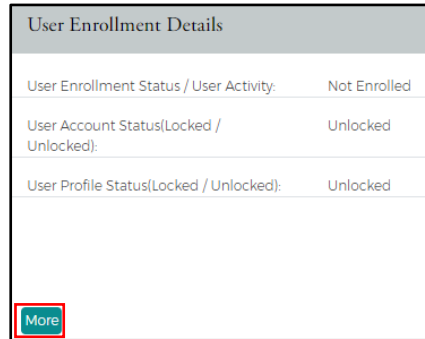
**Step 1:** From the home screen, choose Account Overview from Quick Links **OR** from company hierarchy screen, select  under Actions.



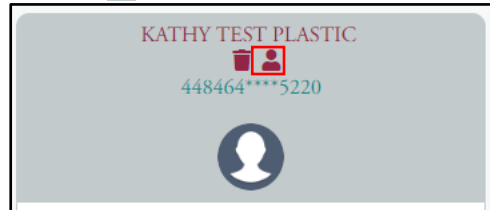
**Step 2:** Select the Account to emulate.



**Step 3:** Select More in the User Enrollment Details box.




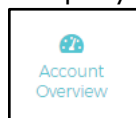
**Step 4:** Choose  under the cardholder name on the left side.



**Note:** Any action taken while emulating is completing a task on behalf of the user. For example, making a payment while emulating will initiate a true payment.

## DOWNLOAD TRANSACTIONS

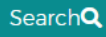
**Step 1:** From the home screen, choose Account Overview from Quick Links **OR** from company hierarchy screen, select  under Actions.



**Step 2:** Select  in the top right corner.

**Step 3:** Choose your time period.



**Step 4:** Select  .

**Step 5:** Select  under Transaction Report in the bottom right to choose the file type (QBO, CSV, Excel, etc.) for the export.