

# NextLogic Release Guide May 16<sup>th</sup>

Product Update



# What is changing?

As we continue to evolve the NextLogic platform, the upcoming May release focuses on the administrator experience. Administrators play a major role in their daily interactions within our platform. Keeping them in mind, we've created exciting new modules as well as improved navigation to make it quicker and easier to perform their regular tasks.

One of the most important changes is to the card ordering process. [Click here to directly go to the page.](#)

This document will highlight the updates that are coming.



Product release date  
**May 16, 2021**

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Note: The data on all page are used for illustration only and do not reflect actual RBC data

# Navigation enhancements

## **Reimagined menu**

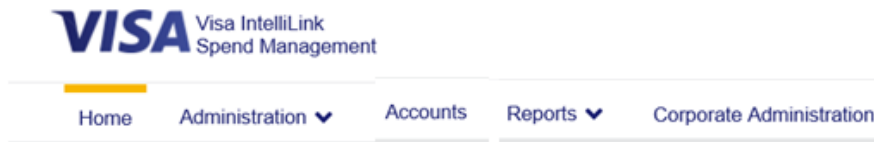
Focusing on simplifying access to the most used and popular areas, general administrator navigations have been improved so you can get to where you need faster and easier.



Administrators  
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# Navigation Enhancements

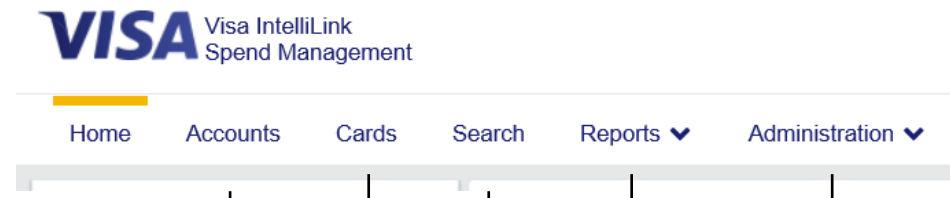
## Before



The new menu display has been introduced to organize and rename categories based on the nature of the activity.

Separating the personal and the organizational functions, as well as grouping based on the different features and use cases, supports easier navigation and categorization of the platform.

## After



This tab will continue displaying balance and transaction info for accounts mapped or delegated to the user.

View cards, employees or statement details in one central location

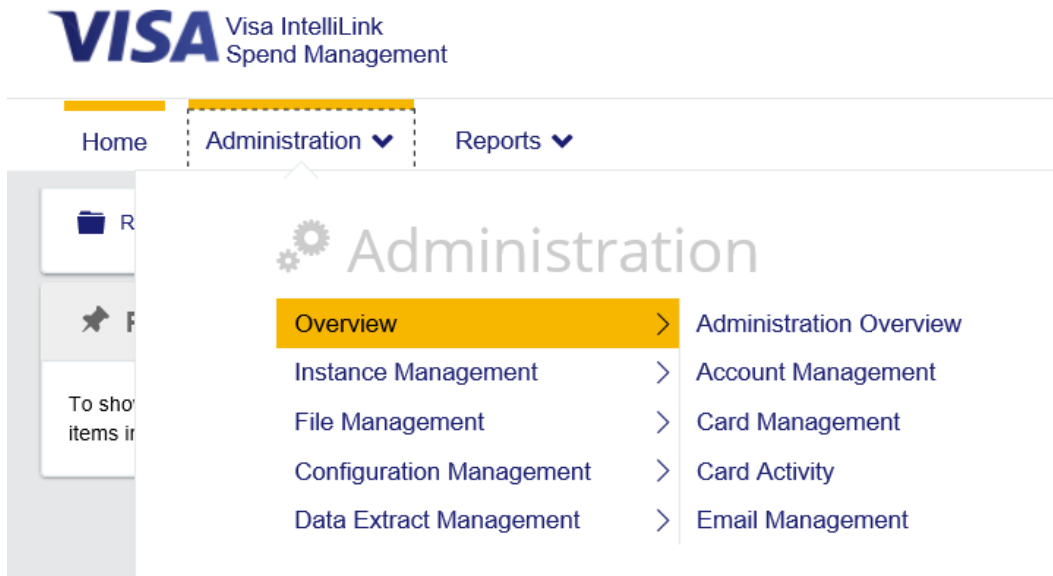
Provides access to the supplier/spend functionality

This tab is similar to before with an additional Card Activity report added

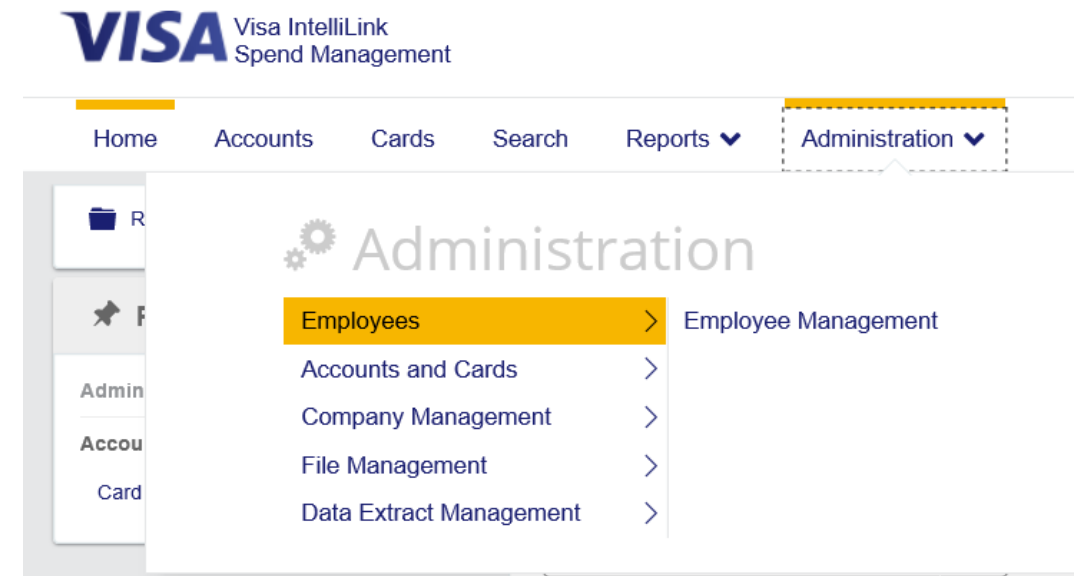
- A refreshed menu grouped by:
- Employee
  - Accounts & cards
  - Company settings
  - Files
  - Data

# Navigation Enhancements

## Before



## After



The administration menu is refreshed in a more organized manner by activity type & most used

# Navigation Enhancements



Home Accounts Cards Search Reports Administration

## Administration

- Employees > Employee Management
- Accounts and Cards >
- Company Management >
- File Management >
- Data Extract Management >



- **Employees** is where to access *Employee Management* activities, such as search for an individual employee, details, mapping, etc.
- **Accounts and Cards** is where to access *Account Management* activities
- **Company Management** is to access company configuration functions
- **File Management** is to access the *Vault*
- **Data Extract Management** is where to customize the extract, and run *Data Analysis* queries

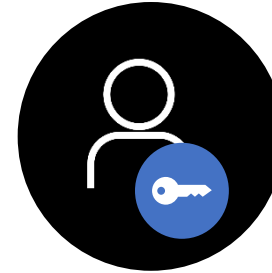
# Card Program Administration (CPA)



## **New module for card administrators**

Introducing the new screen that captures the organization's card information in one interactive dashboard. The CPA module is designed to evolve the platform for easier admin access to statements, transactions and card status.

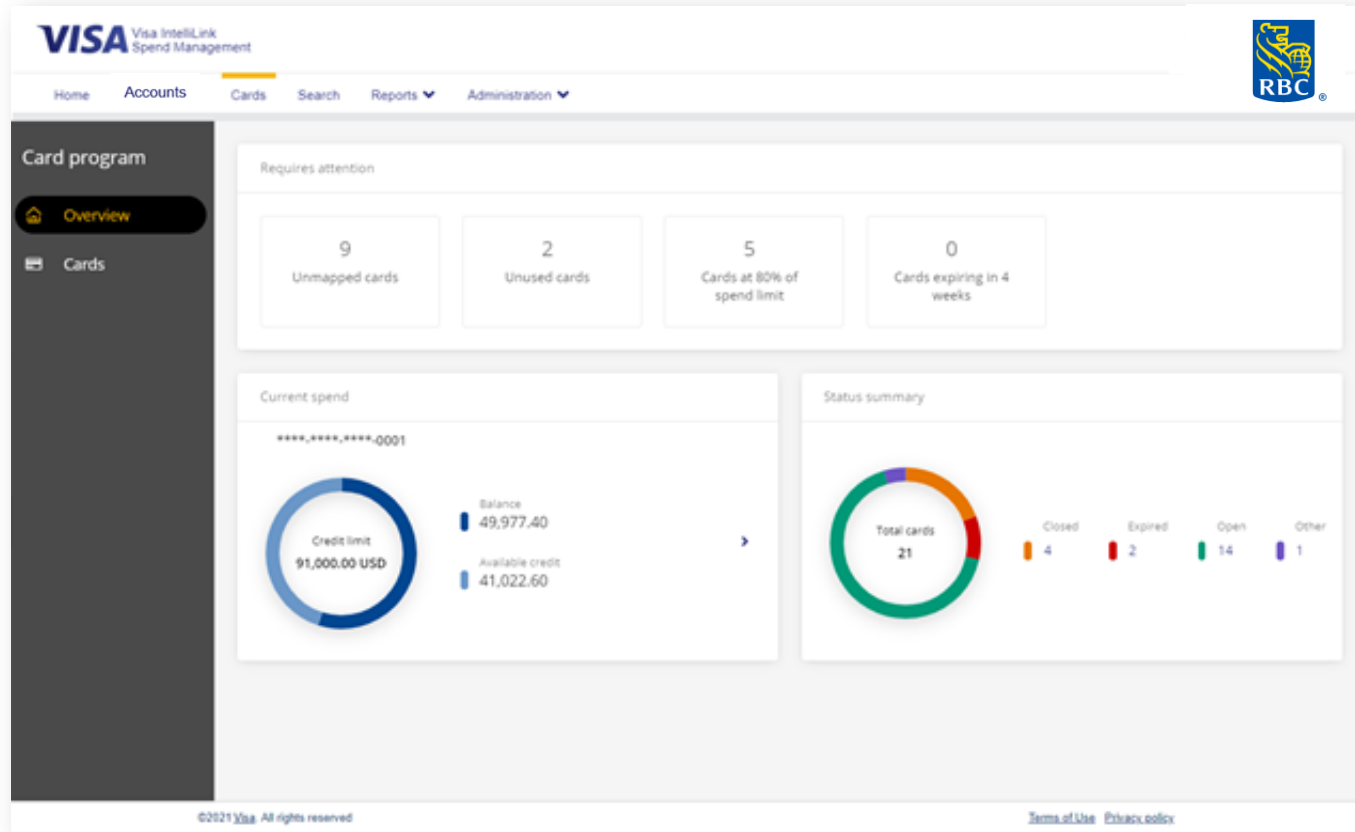
The card program module is just the beginning, as it will continue to evolve with payment control features on the roadmap.



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# Manage your card program in one location



## Benefits of the Card Program Administration (CPA) module

### Streamlined access to card information

Administrators can view different cards, employees or statement details in one central location. This removes the need to navigate through delegate accounts or multiple locations.

### Interactive dashboard

The overview dashboard uses interactive widgets that automatically update, capturing the latest summary of card information that need immediate attention or action.

### Continuous improvement

The introduction of the CPA module is just the beginning, this feature will continue to evolve with new technology and designs to streamline administrative tasks.

# A better way to manage card programs

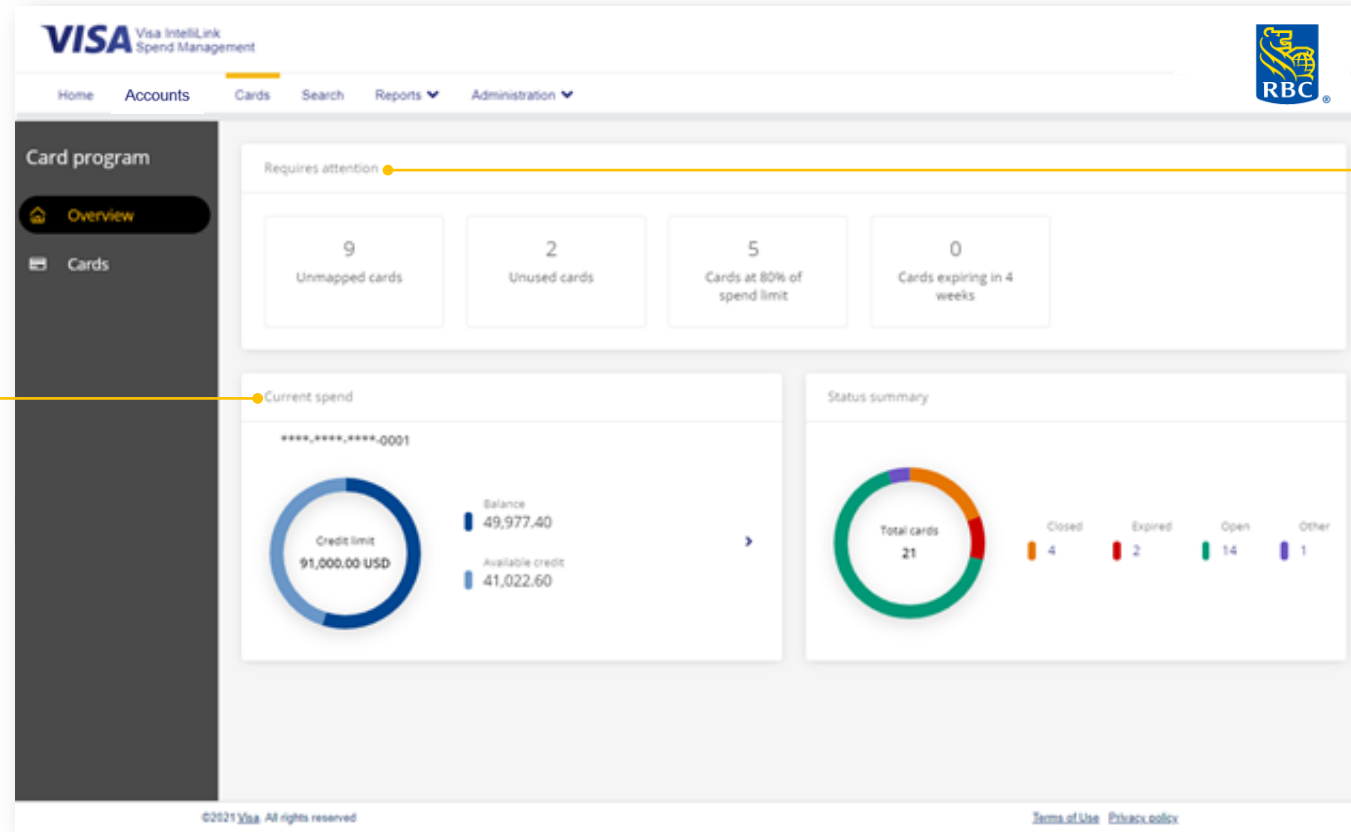
Interactive widgets customized to highlight organization's card program information.

### Current spend summary

Provides a view of spend balances at a corporate level to help with managing overall credit exposure.

### Card status summary

Snapshot number of cards and their status.



### Unmapped cards

Cards that need to be allocated to an employee.

### Unused cards

Based on last 6 months providing visibility for cards that need cancellation or further investigation.

### Cards within 80% of spend limit

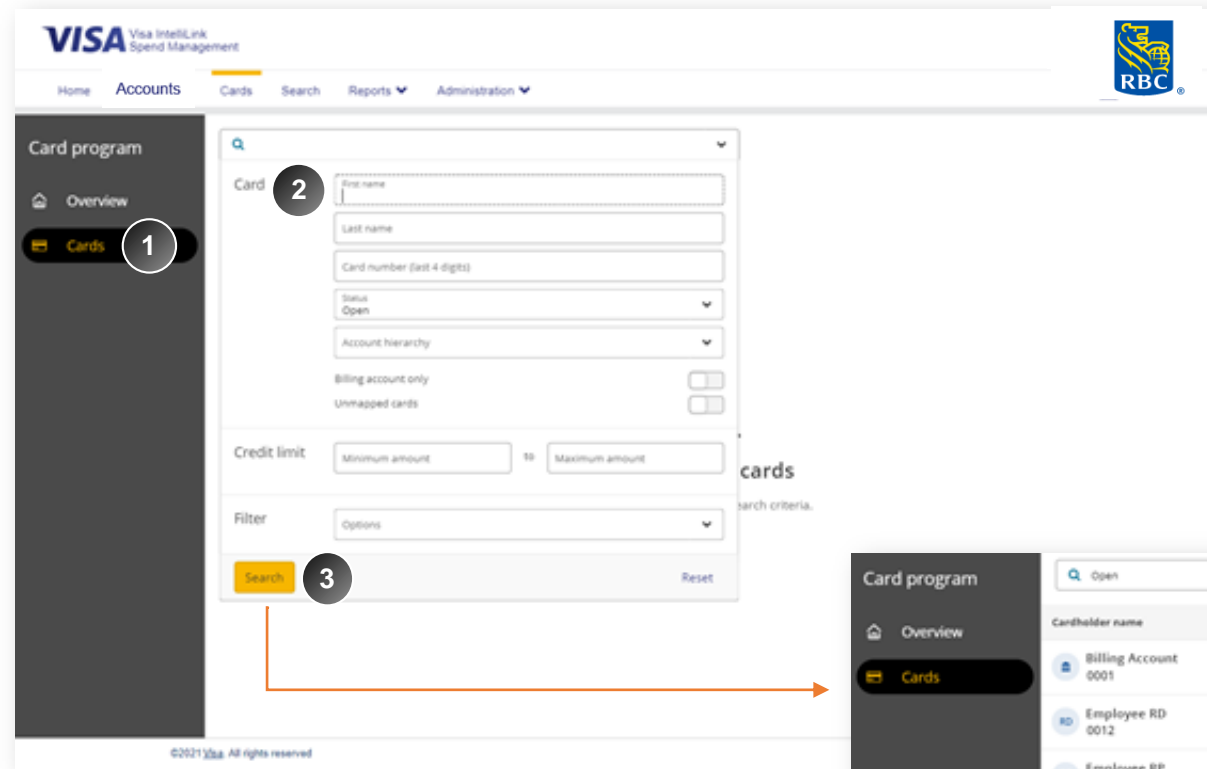
Allowing for quick action to manage employee spend.

### Cards expiring in 4 weeks

Highlight of cards that require replacement or action

The *Card Program Administration Menu* is designed to provide an at-a-glance view into a number of key card program metrics. **Kindly Note:** Pending transactions are excluded from balance and available credit

# Card search details



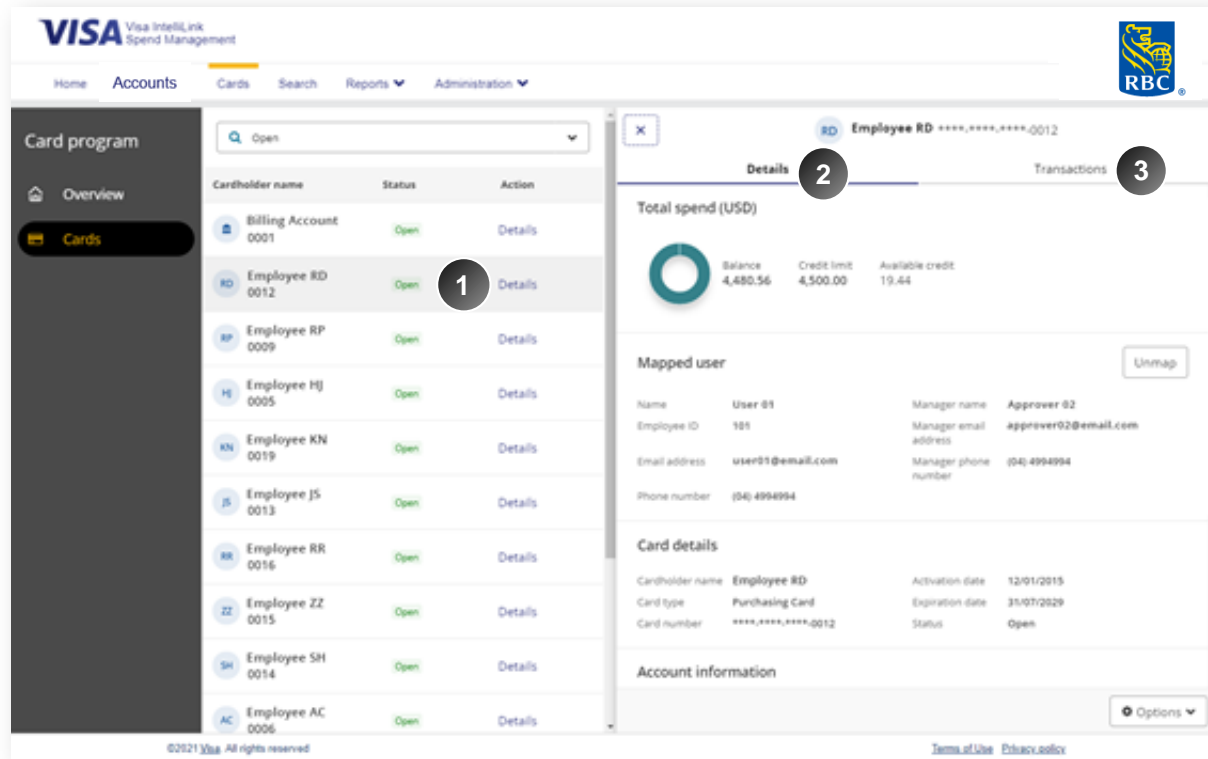
Use the Cards search to find, filter and access cardholder details without needing to delegate accounts.

- 1 To view specific card information, select the **Cards** icon on the left-hand menu.
- 2 Search by key words or filter the search criteria by name, card number, status, mapped cards, credit limit and other advanced settings.
- 3 Click **Search** to view the results.

Cardholder name	Credit limit	Card type	Status	Last transaction date	Action
Billing Account 0001	91,000.00 USD	Purchasing Card	Open		Details
Employee RD 0012	4,500.00 USD	Purchasing Card	Open	11/12/2020	Details
Employee RP 0009	400.00 USD	Purchasing Card	Open	11/12/2020	Details
Employee HJ 0005	3,500.00 USD	Purchasing Card	Open	10/12/2020	Details
Employee KN 0019	4,400.00 USD	Purchasing Card	Open	10/12/2020	Details
Employee JS 0013	5,800.00 USD	Purchasing Card	Open	09/12/2020	Details

*The Cards tab allows administrators to search for any cardholder including seeing a list of all cards when they click search with no filters with option to drill down*

# Card search – action details panel

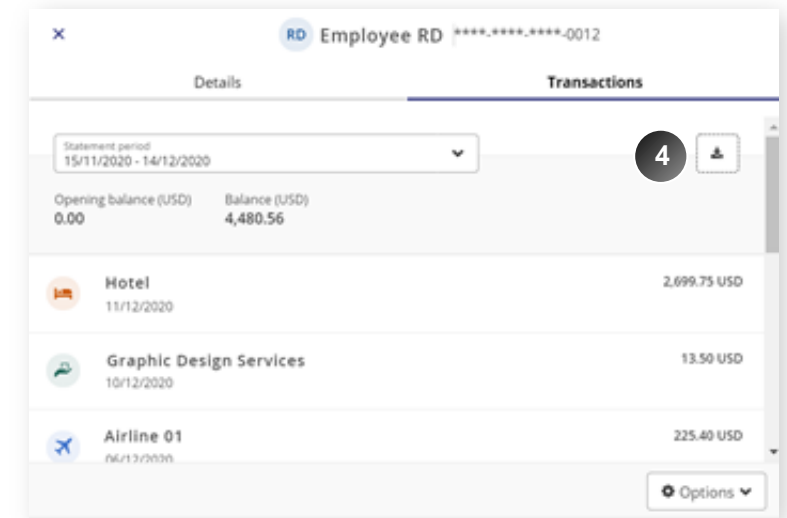


## View details and manage card

- 1 Click into **Details** of any card, where an information panel will appear showing details about the card account.
- 2 In the **Details** tab, you can view linked employee information, with the added ability to allocate or unallocate a card to an employee via the **map** or **unmap** button.

Here you can also see card's total spend and issuer information.

- 3 Navigate to **Transactions** tab to view the individual transactions made on the card.
- 4 If the statement period is closed, the **download** icon will appear to export the statement.



# Unmapped cards – single card mapping

You can choose to map a card individually to an employee or do a bulk-mapping of multiple cards.

The screenshot shows the Visa Spend Management interface. At the top, a 'Requires attention' widget displays four metrics: 12 Unmapped cards (marked with a '1'), 2 Unused cards, 5 Cards at 80% of spend limit, and 0 Cards expiring in 4 weeks. Below this, the 'Cards' section shows a list of unmapped cards. The card for Employee JS (ID 0013) is highlighted, and a '2' is placed over its 'Details' button. To the right, the 'Details' view for Employee JS is shown, including a 'Total spend (USD)' donut chart, a 'Mapped user' section with a 'Map' button (marked with a '3'), and 'Card details' and 'Account information' sections.

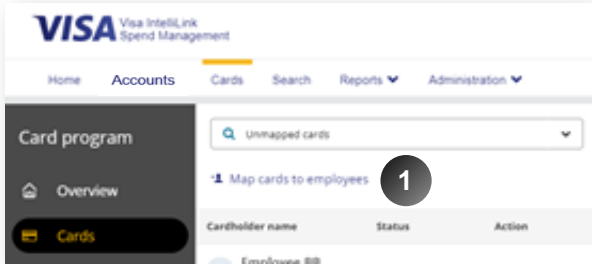
- 1 Click on the **Unmapped cards** widget from the **Overview** screen to view list of credit cards that are not linked to an employee.
- 2 To map an employee – click on the **Details** button beside the card.
- 3 Select **Map** and a search panel will appear for you to filter or search for an existing employee in the system.

The 'Search for user' modal window is shown, featuring a search bar and several input fields: 'First name', 'Last name', 'Email address', 'Employee ID', and 'Company unit' (with a dropdown menu set to 'All company units'). A 'Search' button and a 'Reset' button are located at the bottom of the modal. Below the modal, the text 'Search for a user' and 'Enter keywords and search criteria.' is visible.

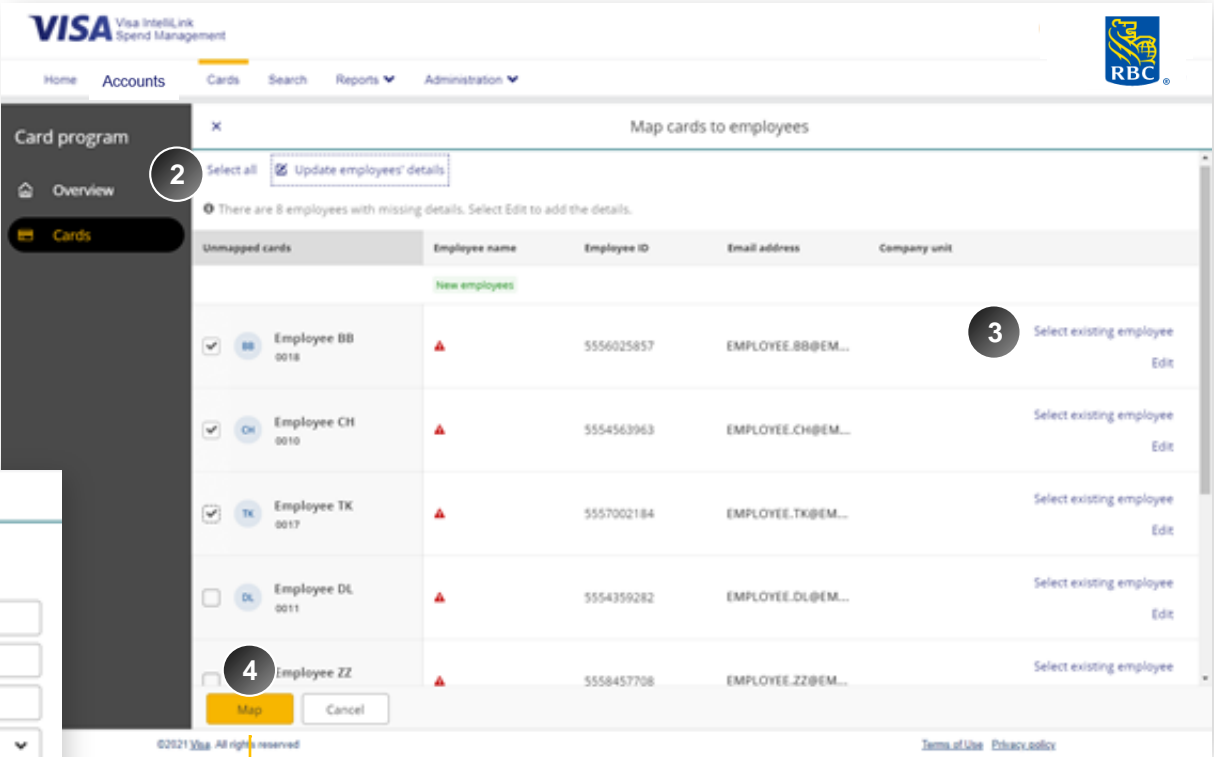
# Bulk processing of unmapped cards

You can choose to map a card individually to an employee or do a bulk-mapping of multiple cards.

1 To map multiple cards at once, select **Map cards to employees** where the list of unmapped cards will be listed.



2 Click **Select all** to map all unmapped cards, or tick the checkbox for the cards that need to be mapped.



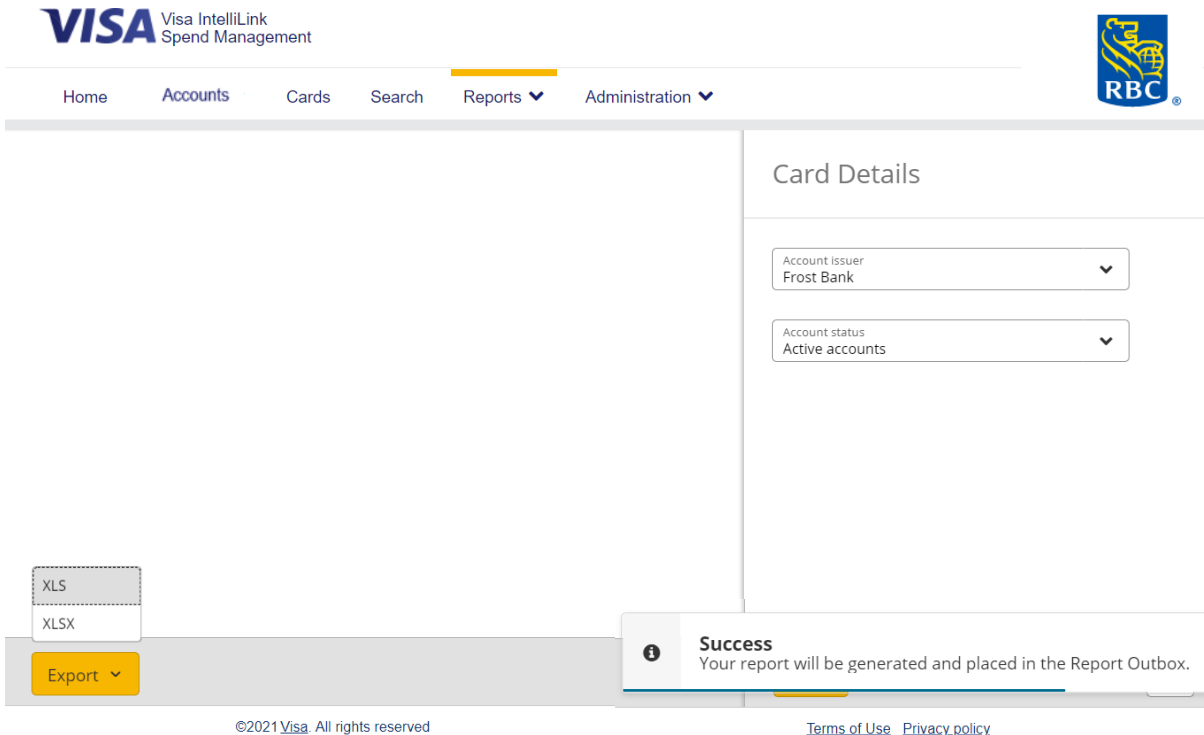
3 There are two options to map the cards:

1. To map to an existing employee in the database, click **Select existing employee**. Use the search feature to find the employee.
2. To create a new employee profile, click **Edit**. This will only create a base profile and requires further details filled in later.

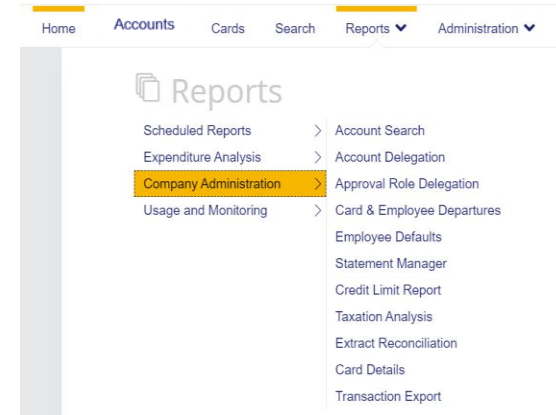
4 Click **Map** button to confirm your selection and map the selected cards.

# Card Details Reporting

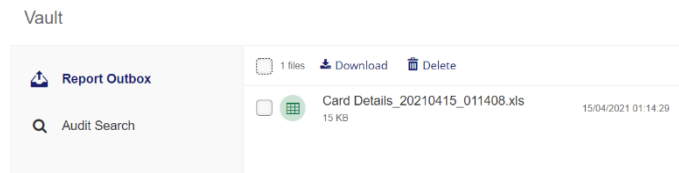
**Cards Details Report lists useful card and cardholder information, such as card balances, related to the employees for whom the administrator is responsible.**



**1 To generate the report, go to Reports > Company Administration > Card Details.**



**2 To access the report, there are two ways:**  
**1. Go to Administration > File Management > Vault**  
**2. Go to Reports > Scheduled reports > Report Outbox**



# Employee Management

## **Refreshed screen with more features**

We've modernized the existing Employee Administration area to align with the designs of our other refreshed screens. Employee management will continue to be refreshed and updated in following releases.

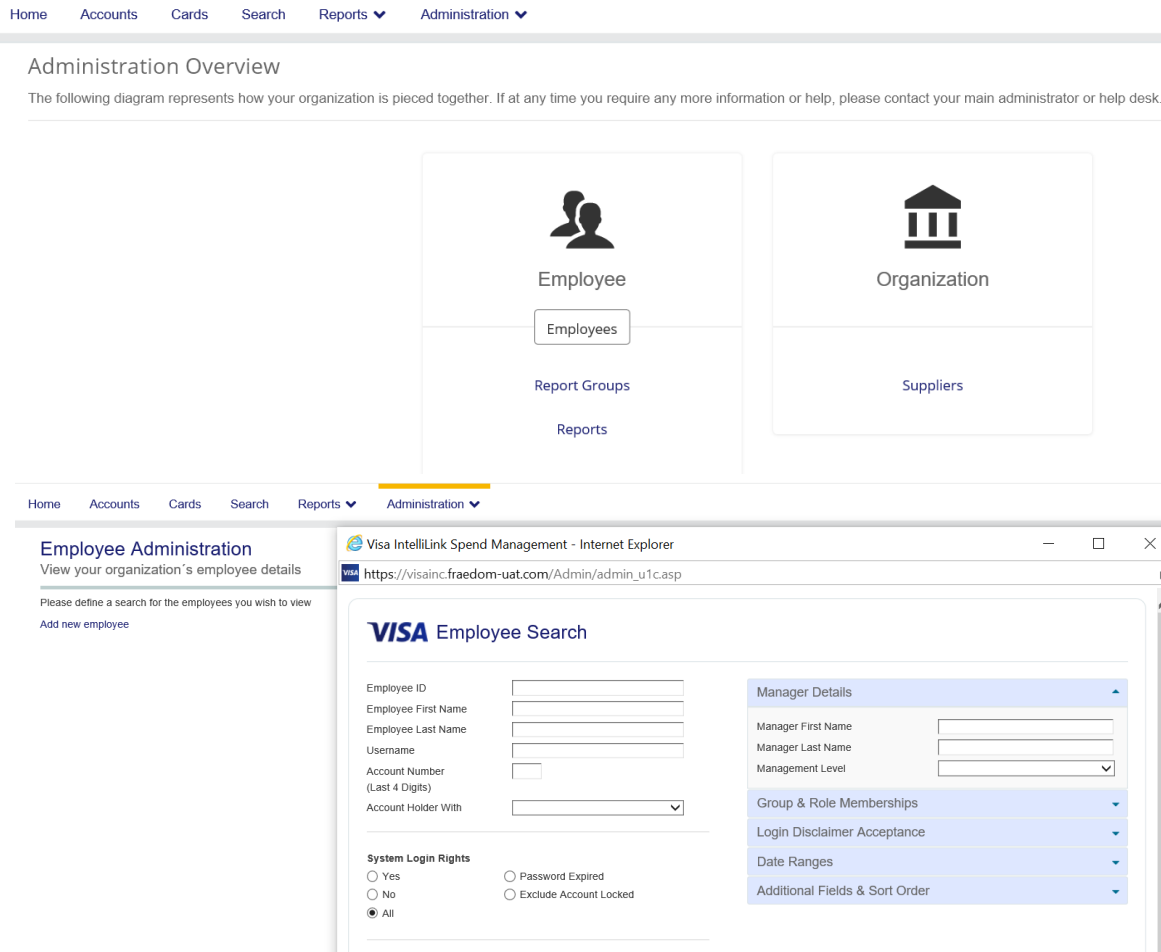


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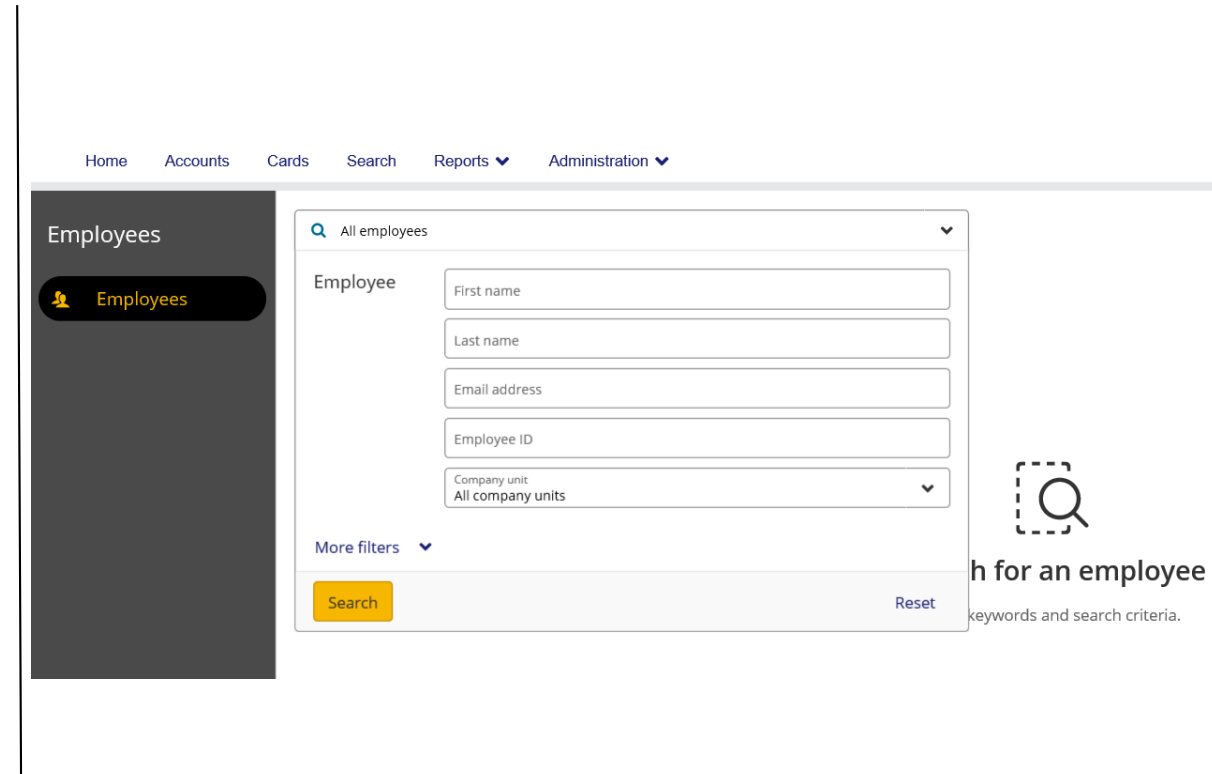


# Employee Management: The classic screen is still used to manage all employee functions.

## Before



## After

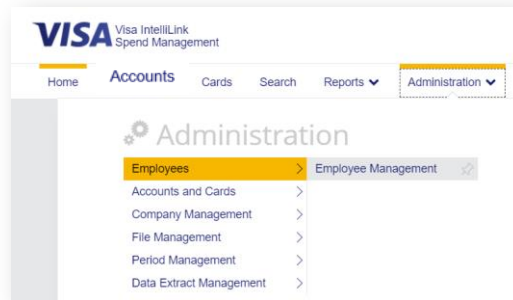


The classic screen is still used for Employee mgmt. functions & can be accessed from the new main menu navigation by drilling through **the Administration > Company Management > Company Setup** menu to access the *Employee* section on the Administration Overview screen.

# Employee details screen

1 To navigate to the **Employee screen**, go to **Administration > Employees > Employee Management**

2 Enter the relevant employee filters, then hit **Search** for the results.



The screenshot shows the 'Employee DH' details panel. It includes a search filter 'All employee' and a table of employees. The 'Employee DH' row is selected, showing details for 'Employee DH' with ID 'dhempl010' and company unit 'Company01'. The 'Details' button is highlighted.

Name	Employee ID	Company unit	Action
DH Employee DH	dhempl010	Company01	Details
NC Employee NC	ncem010	Company01	Details
PB Employee PB	pbem010	Company01	Details

The 'Employee DH' details panel shows the following information:

- User profile:**
  - First name: Employee
  - Email address: emp.dh@email.com
  - Middle name: Manager 2
  - Phone number: (09) 4994991
  - Last name: DH
  - Employee ID: dhempl010
  - Company unit: Company01
- Accounts:**
  - Bank 04 - Lodge Card (Open): \*\*\*\*\_\*\_\*\_\*\_\*\_\*\_\*\_\*\_\*\_\*\_\*\_9507, Credit limit: 2,276.00 USD
  - Cash Expenses
  - Requisition

At the bottom of the panel, there are buttons for '+ Map card', 'Lock account', and 'Change password'.

3 Click **Details** button to open the employee information panel. Here you can:

1. Edit employee profile information
2. Map or Unmap Accounts
3. Delegate this employee's accounts to someone else
4. View and edit accounts delegated to this employee

4 You also have the option of **locking** and **unlocking** employee accounts, and changing **passwords**

# Spend and Supplier Search

## **New Search module**

Designed to help administrators target specific spend patterns and status, these two new screens are simple and interactive reporting tools. These user-friendly screens will empower admin users to search and identify supplier and spend patterns for better spend compliance and employee management.



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# A simple way to search transactions

## Old approach

Visa IntelliLink Spend Management - Google Chrome  
visa-test-dev.freedom-dev.com/Reports/report2\_1010casp

**VISA Transaction Search - Company** Report mode:  Employee  Account

Account Holder First Name:   
 Account Holder Last Name:   
 Account Holder Employee ID:   
 Hierarchy Node:   
 Account Number (Last 4 Digits):

Statement Issuer:   
 Statement Period:   
 Account Type:

Start Date:   
 End Date:   
 Execution Range:

Posting Date  Transaction Date

Export File Name:   
 Export File Type:

Summary - Account  Summary - Type  Summary - Coding  Summary - Hierarchy Node  Transaction List

Exclude Payments  Group Results  Selected Node Only

**Transaction Type & Status**

Transaction Type:   
 Transaction Status:   
 Approval Status:   
 Policy Status:

Receipt Status:  Yes  No  Both  
 Personal Transactions:  Yes  No  Both  
 Linked Transactions:  Yes  No  Both  
 Disputed Transactions:

Supplier Groups:   
 Supplier Properties:   
 Currency & Amount:   
 Enhanced Data & Spend Wizard:   
 Coding Information:   
 Additional Fields:   
 Report Templates:

**Transaction Search – Company** is the most used and powerful reporting tool on the platform, but also the most complex to navigate.

The new Search module is not a complete replacement of Transaction Search, but will offer a simpler and more intuitive way to find supplier and spend data.

## New approach

Visa IntelliLink Spend Management

Home Accounts Cards Search Reports Administration

**Spend search**

Supplier search  
Transaction exp...

Individual employee • 15/12/2020 to 14/01/2021

Show  Card account spend  Employee spend

Employee  All  Individual

Account hierarchy: Issuer & Company ID:   
 Hierarchy node:

Duration:  Statement period  Date range  
 Statement period:

Currency & Amount: Billing currency:

Search Reset

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The design of this tool follows the same look and feel across the platform—meaning it’s simple, modern and intuitive to use.

# Spend search filters

1

2

3

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A new transaction searching tool that allows administrators to target and drill into specific transaction data sets. The user experience follows the same look and feel of the Expense and Approval screens, allowing the user to intuitively search and target spend patterns.

- 1 The new menu item **Search** will be displayed at the top of the menu. Navigate here to search spend or supplier transactions.
- 2 Refine the search criteria with the selection of filters by:
  - Card or employee spend
  - Employee
  - Duration (statement period or date range- limited to 6 months for a given query )
  - Currency and amount
- 3 Click **Search** to get results.

# Spend search – transactions results

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- 1 The search filters will produce a list of transactions. By default, it is displayed and grouped by employee names. Click the chevron icon next to the name to expand the view of employee's transactions list.
- 2 The transactions of the employee account is summarised at the top of the row, to allow a quick view of the employee transactions.
- 3 To view details of individual transactions, click the > icon that will display the **Transaction details** panel.

# Supplier search details

The screenshot displays the Visa Intellink Spend Management interface for a Supplier search. The search criteria are set to 'All suppliers' for the period '15/11/2020 to 14/12/2020'. The results are grouped by 'Airlines', showing 30 suppliers with a total amount of 11,167.30 USD. A detailed view for 'Airline 01 00552327487' is shown, displaying transaction details for an 'Employee AP' purchase of 319.40 USD on 06/12/2020.

Supplier	Amount	Supplier address	Transaction count
Airline 01 (3061)			
Airline 01 0055552327487	319.40 USD	Atlanta	1
Airline 01 0055552327488	319.40 USD	Atlanta	1
Airline 01 0055556790708	218.40 USD	Denver	1
Airline 02 (3066)			
Airline 02 5265555683068	185.40 USD	Dallas	1
Airline 03			
Airline 03 165550913320	512.20 USD	Atlanta	1
Airline 03 165550913322	512.20 USD	Atlanta	1
Airline 03 165550913324	512.20 USD	Atlanta	1
Airline 03 165550913326	512.20 USD	Atlanta	1
Airline 03 165550913328	512.20 USD	Atlanta	1

Supplier details			
<b>Airline 01 00552327487</b>	Total amount	Tax amount	
1 employees 1 transactions	319.40 USD	0.00 USD	
Supplier address	Atlanta		
Merchant group	Airlines		
Merchant category	Airline 01		
Transactions			
Employee AP	319.40 USD	1	
Bank 04	****-****-****-0006		
Posting date	Amount	Tax amount	Transaction type
06/12/2020	319.40 USD	0.00 USD	Purchase

The Supplier search allows administrators to target data based on merchant group, category or specific suppliers. Rather than a simple overview of merchant groups, this tool is useful when trying to analyse specific supplier's transactions or patterns over a specific period.

1 Navigate to Supplier search and fill in the search criteria with the selection of filters by:

- Supplier
- Merchant group or category
- Account hierarchy
- Duration (Statement period or date range - limited to 6 months for a given query )
- Currency and amount

2 By default, the results will be grouped by Merchant categories.

3 Click on the > icon to open the **Supplier details** panel where you can view all transactions from that supplier.

Here you can also view which card accounts and employees have transacted with this supplier.

# Transaction export

The screenshot displays the 'Transaction Export' page in the Visa Intellilink Spend Management system. On the left sidebar, the 'Transaction exp...' option is highlighted with a circled '1'. The main header shows the Visa logo, 'Visa Intellilink Spend Management', and the RBC logo. Below the header, navigation tabs include Home, Accounts, Cards, Search, Reports, and Administration. The 'Transaction Export' section features several filters: 'Account issuer' (set to Bank 04), 'Date Type' (set to Posting Date), 'Start date' (01/02/2021), and 'End date' (28/02/2021). A circled '2' points to these filters. At the bottom left, an 'Export' button is highlighted with a circled '3'. The footer contains the copyright notice '©2021 Visa. All rights reserved' and links for 'Terms of Use' and 'Privacy policy'.

- 1 Navigate to **Transaction export** if you need to export your transaction data for detailed analysis.
- 2 Filter the export by account issuer, data type and date range.
- 3 Hit **Export** to export in .XLS, .XLSX or .CSV data formats. The data can be used for further analysis in Excel.



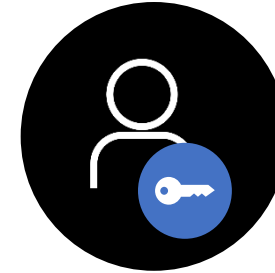
# Card Ordering & Employee Creation

## **New Search module**

The card ordering process has changed, combining two separate workflows into one, making it easier for the administrators to issue & edit cards and assign them to employees in one process.

Please find the details of the process at

<http://www.rbcroyalbank.com/commercial/campaign/commercial-cards/pa/index.html>

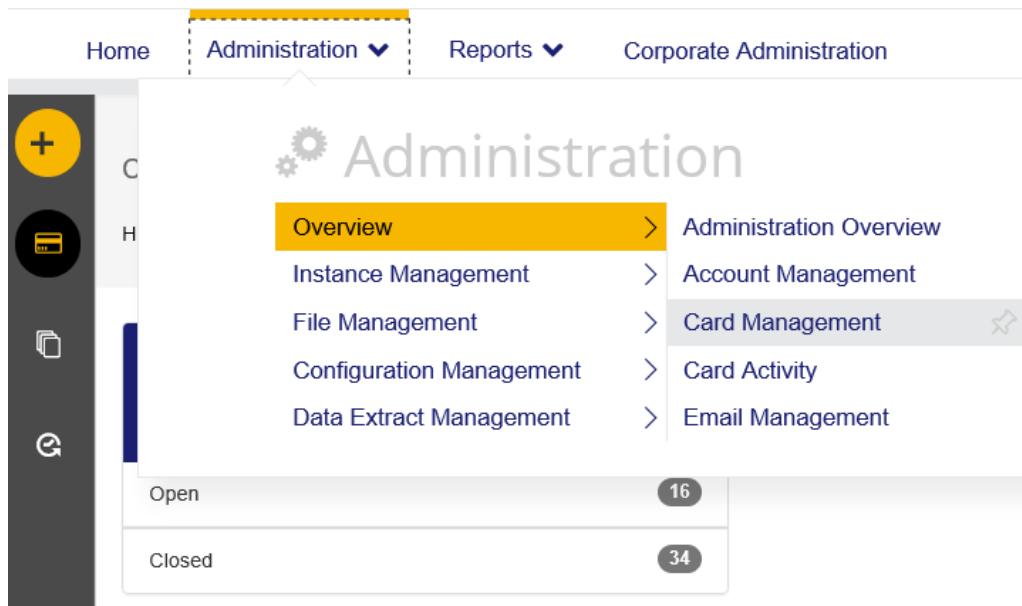


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# Cards Ordering & Employee Creation:

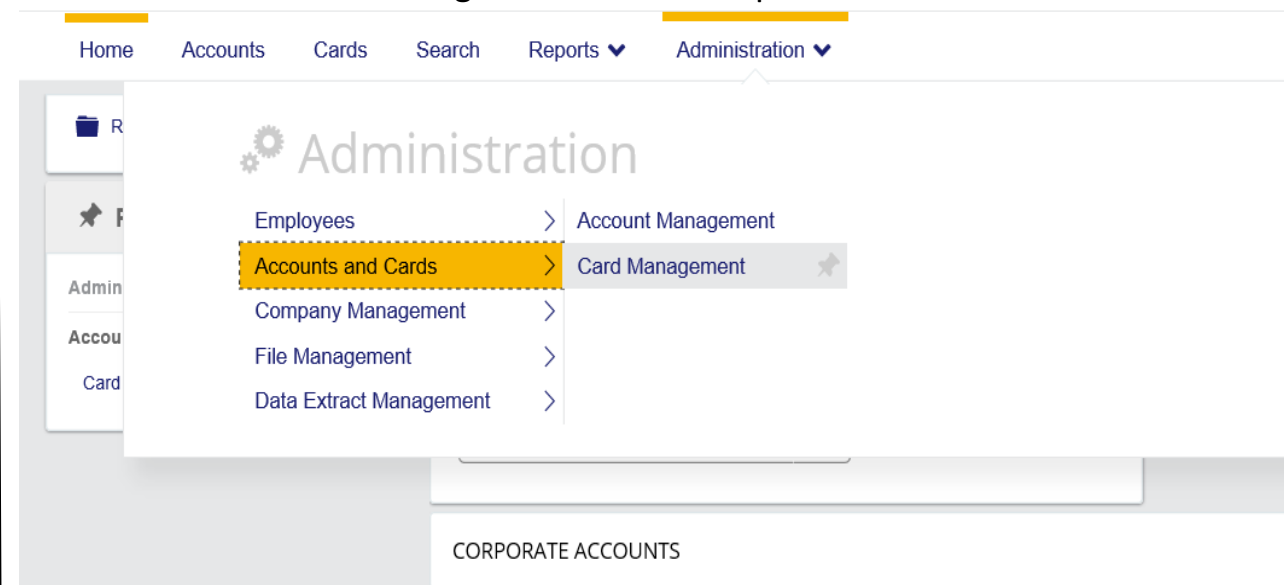
Note: we have created a detail guide on the new process, which can be found at XXX

## Before



## After

Go to Administration > Accounts and Cards > Click Cards Management to start the process



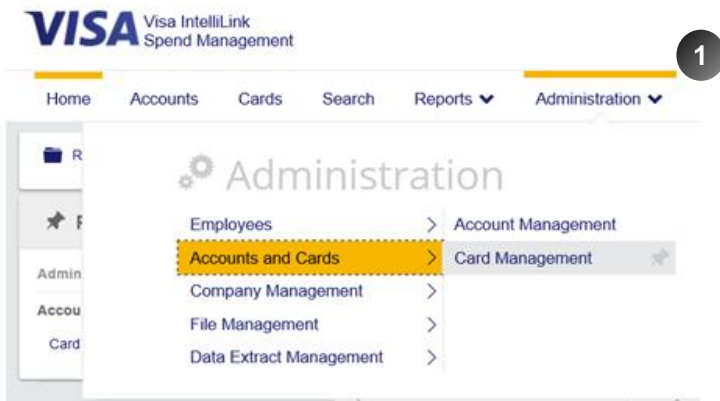
The card ordering process has changed, combining two separate workflows into one, making it easier for the administrators to issue cards and assign them to employees in one process.

Please find the details of the process at

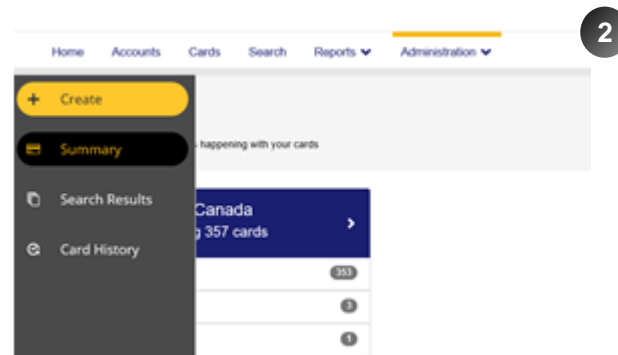
<http://www.rbcroyalbank.com/commercial/campaign/commercial-cards/pa/index.html>

# Cards Ordering & Employee Creation: Create a card and assign it to a new employee in one easy process.

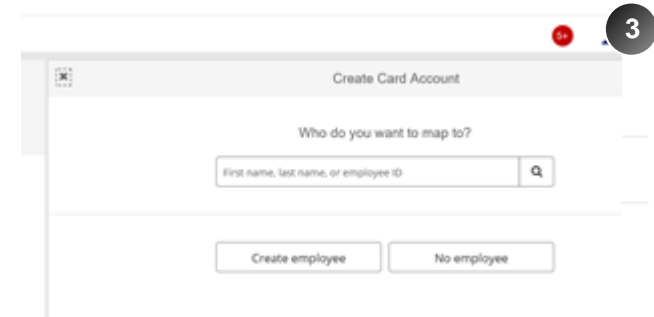
Go to Administration > Accounts and Cards > Cards Management



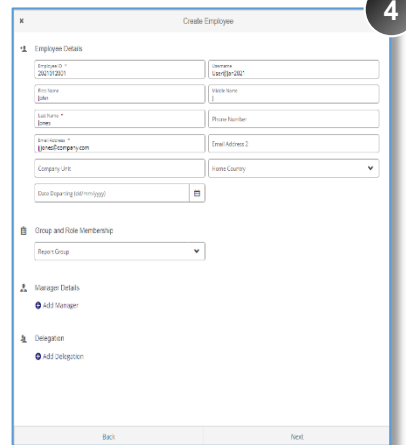
Click CREATE



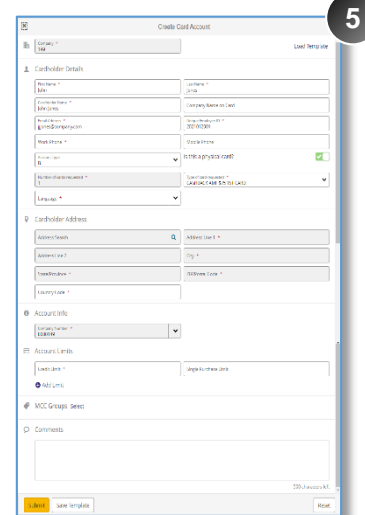
Click New Employee



Fill out Employee details



Fill out Card details



Please note that this is a summarized view and shows only 1 scenario, you can find the details of the process in the user guide available at <http://www.rbcroyalbank.com/commercial/campaign/commercial-cards/pa/index.html>, available May 16th

## Questions:

### Need Help?

- If you have any questions, please contact Commercial Cards Client Support at [rbccommercialcards@rbc.com](mailto:rbccommercialcards@rbc.com) or 1-877-334-9938 (Monday to Friday 08:30 to 19:00 EST).
- Please visit the Commercial Cards Service center at <http://www.rbcroyalbank.com/commercial/campaign/commercial-cards/pa/index.html>