



RBC Commercial Cards

NextLogic Digital Enhancements



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We continue to invest in providing a seamless experience centered on innovation and market-driven needs.

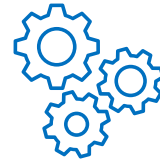
What's new in RBC NextLogic?



As of November 27st, 2023

New Company Dashboards

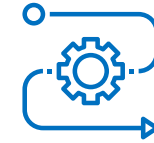
- Gain visibility and insights into your spend to help you make quick and informed decisions.
- Benefit from interactive elements that allow you to search and filter targeted data.



Coming Soon

New Card Controls

- Apply payment controls based on merchant category groups, transaction limits, location, channel and spend velocity.
- Enjoy flexibility to manage and control spend using a multitude of variables.



Coming in 2024

More Data Integration

- Link to Quickbooks, or Xero for automated data transmission.
- Eliminate the need to manually upload files or key information into your accounting solutions.

New company dashboards

Greater program insights

Introducing new dashboards with interactive elements and customizable fields you can filter and view targeted details.

What Dashboards can I Access:

You have a total of 8 dashboards, 4 providing details on specific categories for 1 year and 4 providing details on those categories for 3 years. The categories you have access to include:

- 1 Employee Spend**
Detailed view of spend by department, down to each employee's spend habits month to month.
- 2 Transaction Details**
Breakdown of overall spend by transaction type and currency at a company, department or cost-centre level.
- 3 Merchant Spend**
Better view of supplier costs with detailed spend and transaction volumes by merchant category.
- 4 Department Spend**
Understand department spend patterns and gain insight into volumes and transaction counts in granular detail.

How to Access Your new Dashboards

- Your organization has been provided a dashboard licence you will need to assign to a specific user.
- Once assigned, the licence will provide the user with access to view, adjust and export information on your program.
- The License can be removed from one user and re-assigned to another user at any time with the new user gaining access in real time.

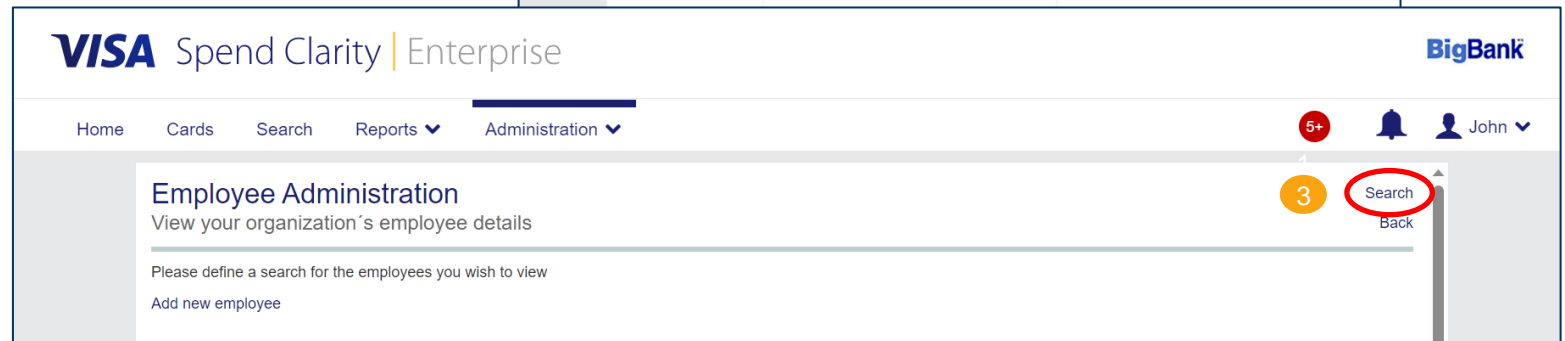
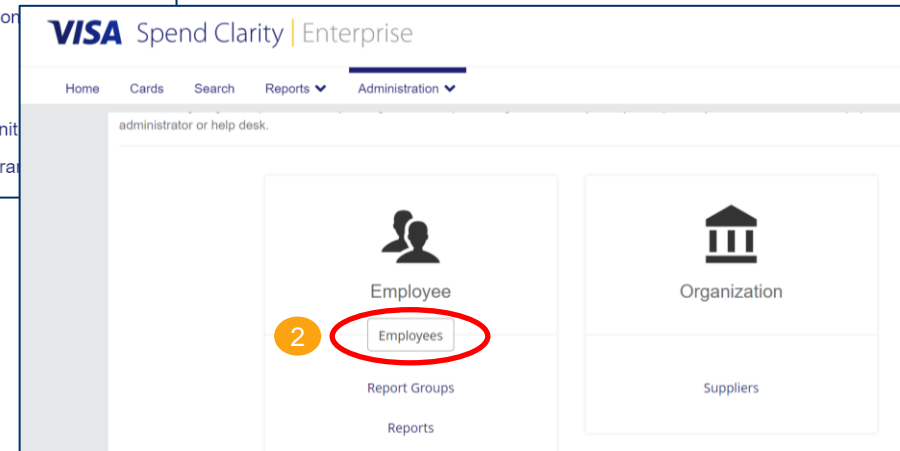
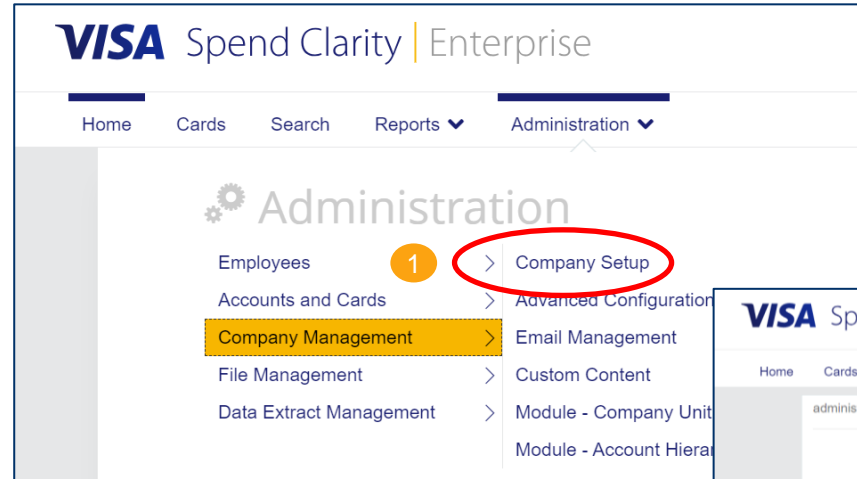


How to Assign Your Dashboard License.

1 Start by accessing the **Administration** tab and under **Company Management**, select **Company Set-up**.

2 Once in the Administrative Overview, select **Employees**.

3 Within the **Employee Administration** screen, select **Search**.



How to Assign Your Dashboard License.

- 1 Once in the Employee Search screen, you can enter details for a specific individual or just click Search to generate a list of all employees.
- 2 Identify the employee you want to assign the license to and click on the Employee details button under Actions.
- 3 On the Personal Details Report screen, select Dashboards Access.
- 4 Once the Dashboard screen appears, toggle the User Rights – Access Dashboards button.

The user assigned the license can then proceed to assess, adjust and export dashboard details.

To re-assign the dashboard to a different user, simply untoggled the Dashboard access button on the existing user, then re-assign to the new user.

The screenshot shows the VISA Spend Clarity Enterprise interface. The top navigation bar includes Home, Cards, Search, Reports, and Administration. The main content area is titled "Employee Administration" and displays a table of employees matching search criteria. The table has columns for Employee Name, Access Level, Last Login, and Actions. The Actions column for "Cardholder 2" is circled in red with a "2" callout, indicating the click action. Below the table, the "Personal Details Report" for "Cardholder 2" is shown. The "Dashboards Access" section is highlighted with a red circle and a "3" callout. The "User Right - Access Dashboards" toggle switch is circled in red with a "4" callout, indicating the toggle action. The "Search" button in the top left is circled in red with a "1" callout.

Employee Name	Access Level	Last Login	Actions
Antanette Mattheiss	Administrator	09/13/2023 14:21:01	[Icons]
Cardholder 1	General	09/28/2023 20:18:11	[Icons]
Cardholder 2	General	09/28/2023 15:41:44	[Icons]

Personal Details Report
Cardholder 2

Report Groups | Reports

Personal Details | Access Rights | Audit History | Security | Mobile Devices | **Dashboards Access**

Dashboards Access
User Right - Access Dashboards [Toggle]

Important: If you do not see the “Dashboards Access” option, please clear your browser history, then retry.



Access is available to your lead program administrator to better manage your program details.

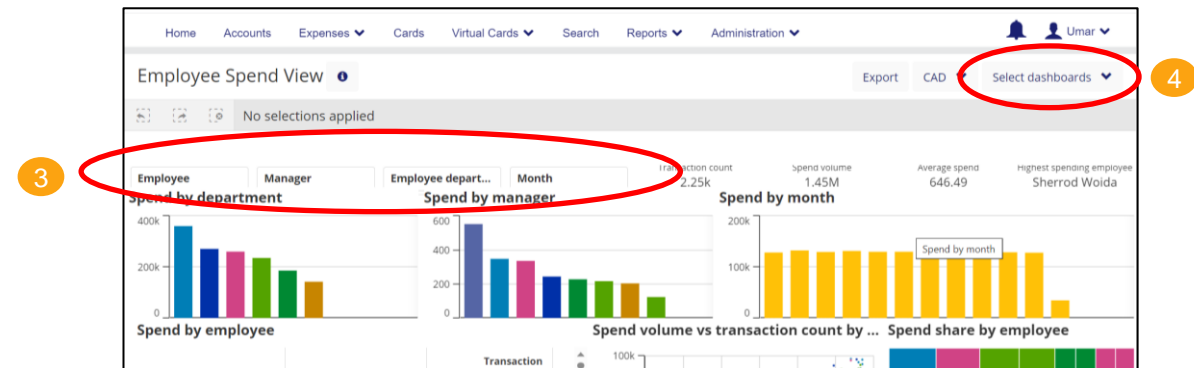
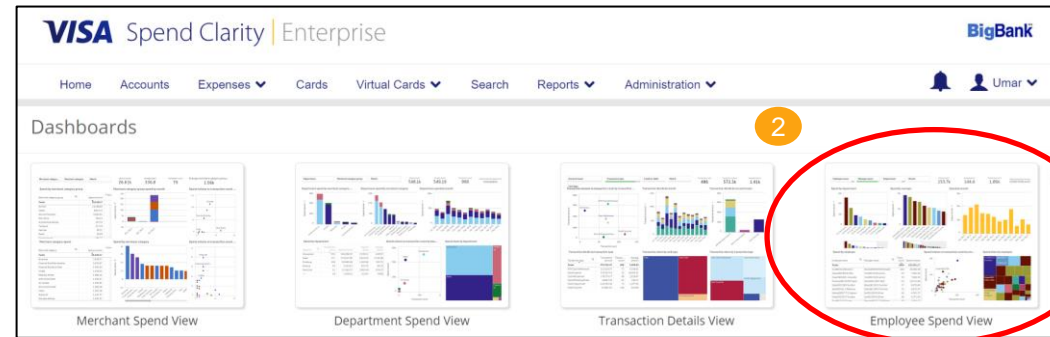
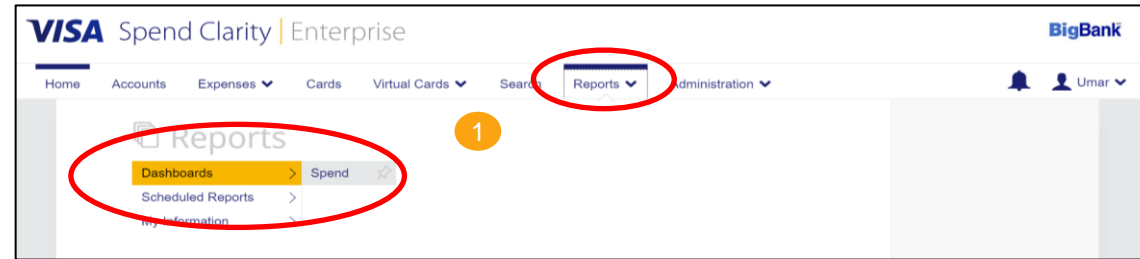
Access to Company Dashboards

Program administrators can access company dashboards in the Reports section of NextLogic.

At launch, all primary program administrators will be able to select and adjust each of the four options available.

Here's how to access the dashboards:

- 1 Click on the **Reports** tab and select **Dashboards**.
- 2 Select the dashboard you want – a default dashboard will be presented.
- 3 Adjust the selection criteria to customize the information presented.
- 4 Toggle between dashboard options using the dashboard dropdown menu in the top-right corner.



Important: If you do not see the Dashboards option, please clear your browser history, then retry.



New card controls

Better manage your cards in real-time

Your program administrator has access to new controls to help reduce the risk of fraud and enforce company policies for employee spend.

The screenshot displays the VISA Spend Clarity Enterprise interface. The top navigation bar includes 'Home', 'Accounts', 'Expenses', 'Cards', 'Virtual Cards', 'Search', 'Reports', and 'Administration'. The user 'Umar' is logged in. The left sidebar shows 'Cards' with 'Overview' and 'Cards' options. The main content area shows a search for 'Open • Cards at 80% of spend limit'. A table lists cards with columns for 'Card', 'Status', and 'Action'. The card for 'Cleodis Sorsby 0001' is selected, and the 'Card controls' tab is active, highlighted with a red circle. The 'Transaction controls' section includes options to block ATM cash withdrawals, cash access transactions, all transactions over a specified limit, online transactions, and transactions made online, by phone, or by mail order. Buttons for 'Edit', 'Add', and 'Remove all' are visible at the bottom.

Card	Status	Action
TA Tead Acerno 0002	Open	>
CS Cleodis Sorsby 0001	Open	>
EH Estanislado Hannaford 0020	Open	>
JK Jarred Karlovec 0019	Open	>
SK Shani Kourlis 0006	Open	>

New Card Controls

We've made it easy to apply controls to individual cards so you can manage how your employees spend, including:

- Blocking ATM withdrawals
- Blocking cash transactions
- Blocking all transactions over specified limits
- Blocking online, phone or mail order transactions
- Restricting cross-border transactions
- Restricting by merchant group
- Setting spend velocity controls (limit amounts or volumes in a specified timeframe; e.g. \$1,000 max spend per month)

Adding controls is easy and can be completed in real-time from your Cards tab.

How to set card controls:

- 1 Click on the **Cards** tab.
- 2 Select **Actions** for a specific card you want to add controls to.
- 3 Open the **Card Controls** window.
- 4 Select a control option and click **+ Add**.
- 5 Enter control details and click **Submit**.

Once a control is submitted, it's active.

The screenshot shows the VISA Spend Clarity Enterprise interface. The 'Cards' tab is selected in the top navigation bar. A table lists several cards, including 'Cleodis Sorsby 0001'. The 'Action' column for this card is circled in red, with a '2' indicating the next step. A 'Card Controls' window is open for this card, showing various control options like 'Restrict cross-border transactions', 'Spend velocity controls', and 'Merchant category group controls'. The '+ Add' button at the bottom of the window is circled in red, with a '4' indicating the next step.

The screenshot shows the VISA Spend Clarity Enterprise interface, focusing on the 'Card Controls' window for card 'Cleodis Sorsby 0001'. The 'Spend velocity controls' section is expanded, showing options to 'Restrict transactions by spend velocity'. The 'Submit' button at the bottom of the window is circled in red, with a '5' indicating the final step.

Thank you for your business

For more information on your RBC Commercial Card program or access to our comprehensive guides and easy-to-view tutorials, please visit:

[Commercial Cards Service Centre](#)

