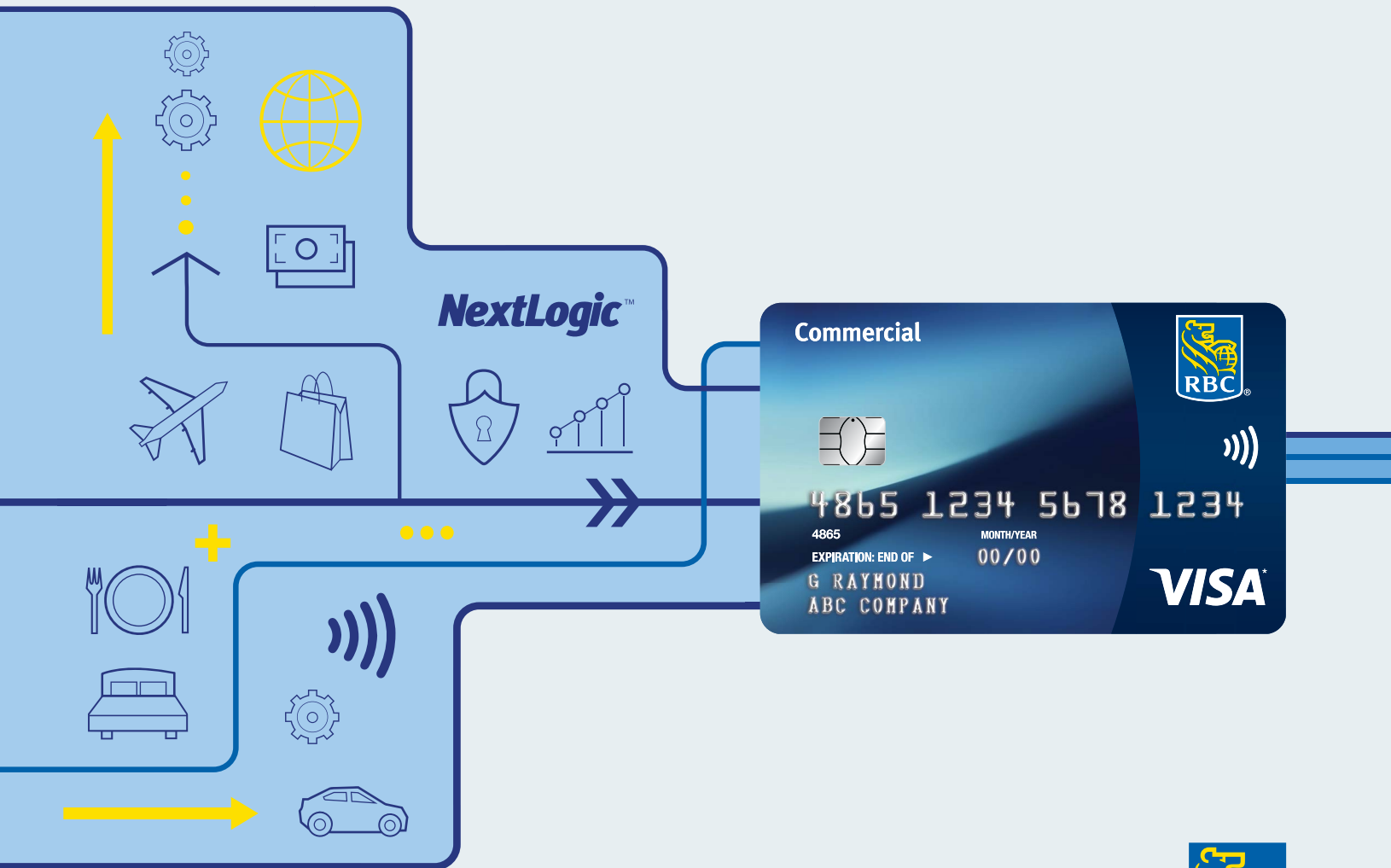


# RBC NextLogic

## Program Administrators Guide



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## Getting started

# Guide overview

Your RBC® Commercial Card Program is a valuable tool for optimizing your company's payment needs. Through your program, you have access to online tools and information that will let you issue cards, set controls, view transactions and more. This guide provides a detailed overview of the features, functions and ways you can leverage your commercial card portal to maximize the value of your program.

We have also developed a variety of training and information resources for both you and your cardholders. These resources are available in our [RBC Commercial Cards Service Centre](#). Our Service Centre also provides key contact details on how to reach our support teams, which are available to assist you with any questions you may have.

# What is RBC NextLogic?

RBC NextLogic® empowers companies to manage their commercial card program with a host of services we have brought together, including Visa Spend Clarity for Enterprise (VSCE), Visa Payables Automation (VPA), Visa Business Solutions (VBS), data integration options and more. The platform is designed to increase control over employee spend and help save time by curtailing manual work.

Below are some of the key features and benefits of RBC NextLogic that will help you successfully manage your commercial card program.

## RBC NextLogic features

- Manage card limits
- Leverage an easy-to-use, 24/7, online self-service portal to manage your program
- Set up, issue, manage and cancel credit cards for your employees
- Establish individual card controls on your employees' credit cards to align your program with your policies
- Manage credit card limits including the ability to set temporary increases to support employee payments
- Access enhanced data, reporting, statements and dashboards to understand program spend, supplier payments and employee transactions
- Integrate your program data with third-party expense management, accounting and enterprise resource management (ERP) systems
- Generate and issue to your suppliers and employees virtual credit cards to digitize payments while reducing risk

## RBC NextLogic benefits

- Greater control and visibility
- Ability to identify spending patterns with multiple reporting options
- Enhanced data offering detailed information such as flight duration, class of travel and destination
- Dynamic and customizable reporting with statements available at individual and company-wide levels

# What is a virtual credit card?

Virtual credit cards are digitally generated numbers that let you make credit card payments without providing a credit card number. Virtual credit cards are intended for limited use where plastic cards are not required (online purchases, vendor billing, etc.). They provide a secure means of making credit card payments without exposing your credit card account number, and provide enhanced controls to limit the chance for fraudulent transactions.

Below are some of the key features and benefits of Visa Payables Automation that will help you successfully manage your invoice payment needs.

## Stay secure

- **Single-use virtual credit card:** Avoid the risks of giving out a credit card number through non-secure channels such as email or phone – or of having suppliers hold your card number on file
- **Exact match:** Reduce erroneous charges by restricting payments to specific amounts
- **Security questions:** Help prevent fraudulent use by having suppliers authenticate themselves before receiving payment
- **Approvals and reporting:** Optimize oversight by assigning approvers before payment submission and accessing audit reports that capture every action taken

## Save time

- **Bulk invoice payments:** Pay multiple suppliers and invoices at once using a single payment file
- **Bulk supplier upload:** Add/edit suppliers at once using a single supplier bulk upload file
- **Automated reconciliation:** Automatically match payments to invoices in a single reconciliation

# Logging into RBC NextLogic

## As a Program Administrator you have three ways to access RBC NextLogic

- Through **Visa Business Solutions**
- Through **RBC Express®**
- By directly logging into **RBC NextLogic** at [visaonline.com](https://visaonline.com)

## Access RBC NextLogic through Visa Business Solutions

1. Access RBC NextLogic by going to the **Commercial Cards Service Centre** at [rbc.com/corporatecardservices](https://rbc.com/corporatecardservices).
2. Click **Log in for Program Administrators** in the pop-up window.  
**Reminder:** *Ensure you have enabled pop-up windows in your browser.*
3. Click **Continue**.

### Log in to RBC Next Logic

RBC NextLogic is a self-serve, easy to use online card management and reporting tool that helps you manage expenses and card transactions, 24 hours a day, 7 days a week.

*Program Administrator*




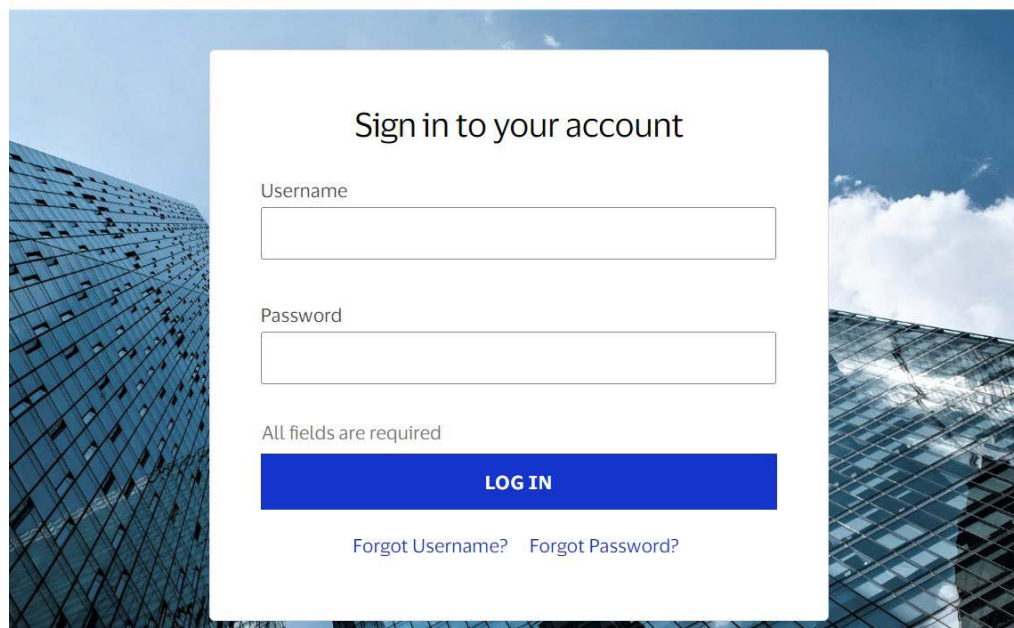
*Cardholders*



You will be directed to the **Visa Business Solutions** page.

**VISA Business Solutions**

English(US) 



4. Enter your **username and temporary password** then click **Log in**.

If you are a company Program Administrator undergoing the implementation process, your username will be in the Confirmation Form PDF and your temporary password was provided to you by email.

5. When prompted, change your temporary password and set up four security questions.

## Clients with RBC Express single sign-on setup

- You will need to log into RBC NextLogic through the [Commercial Cards Service Centre](#) for your first login.
- For future logins, you can access RBC NextLogic through RBC Express by clicking **RBC NextLogic** in the **Online Services** section.

## Logging directly into RBC NextLogic

1. Click the [visaonline.com](https://visaonline.com) link. This will bring you directly to RBC NextLogic (the screen will display Visa Spend Clarity for Enterprise).
2. When prompted, enter your username and password.

Once you are logged in, you will be directed to the RBC NextLogic home page.

## How to access Visa Payables Automation (VPA)

Please use the following steps to access Visa Payables Automation (VPA):

1. Access RBC NextLogic via the Commercial Cards Service Centre: [rbc.com/corporatecardservices](https://rbc.com/corporatecardservices).
2. Click **Log in for Program Administrators** in the pop-up window.  
**Reminder:** *Ensure you have enabled pop-up windows in your browser.*
3. Click **Continue**. You will be directed to the **Visa Business Solutions** page.
4. Enter your username and password then click **Log in**. If you are a company Program Administrator undergoing the implementation process, your username will be found in the Confirmation Form PDF and your temporary password was provided to you by email.
5. Under **my Services**, select **Visa Payables Automation** from the drop-down menu. The page will redirect you to the Visa Payables Automation home page.



# How to grant access to a secondary Program Administrator

## Who can be a secondary company Program Administrator?

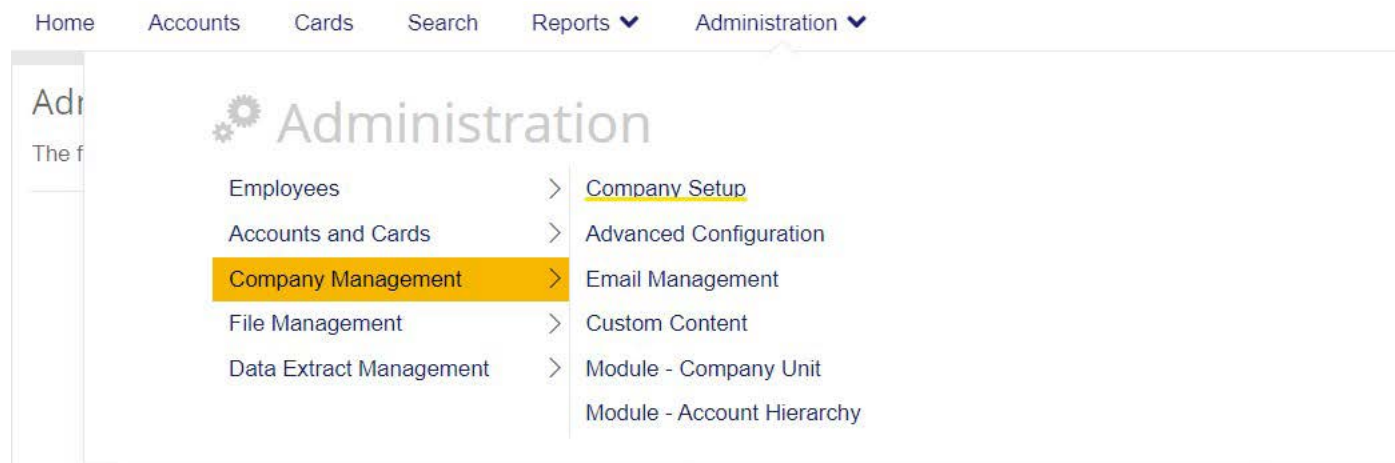
The lead Program Administrator is responsible for assigning a secondary administrator based on each company's requirements. In many cases, secondary administrators are accounts payable personnel, bookkeepers and members of your finance or accounting team who are responsible for the reconciliation and payments of billing statements. Secondary administrators will have access to view transactions and download billing statements.

## Follow the next steps to grant access to a secondary Program Administrator

1. Follow the navigation path below in Visa Spend Clarity for Enterprise:

**Administration > Company Management > Company Setup**

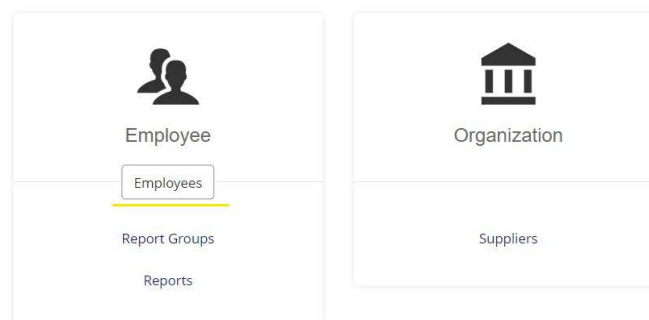
2. Click the **Employee** tab.



3. Click **Employees** in the hierarchal diagram.

### Administration Overview

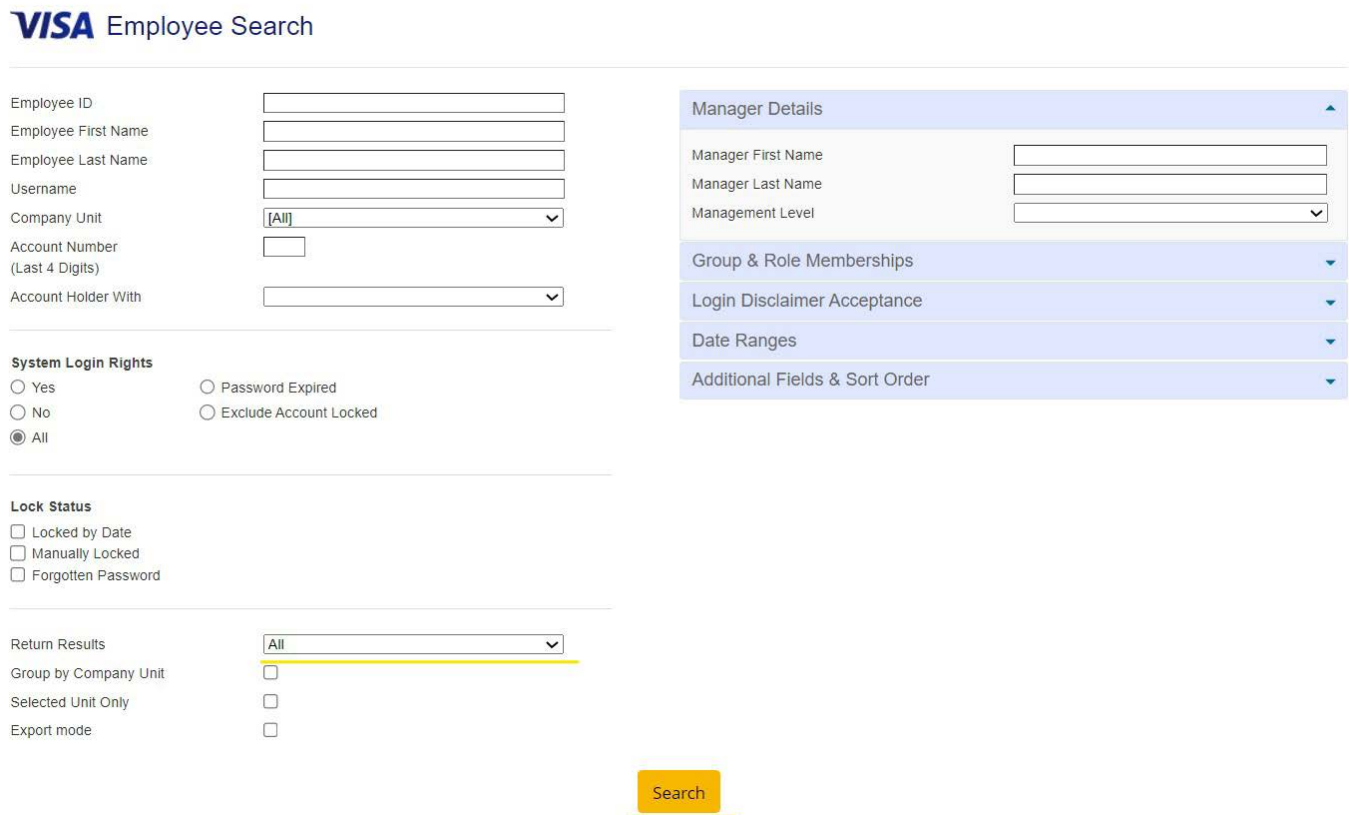
The following diagram represents how your organization is pieced together. If at any time you require any more information or help, please contact your main administrator or help desk.



- The Employee Search window will pop up. Don't see the pop-up window? Check your browser settings to ensure your pop-ups are enabled.



- Click **Search** to display all the employee profiles. In the pop-up window scroll down to the bottom left and change Top 20 to All.



- Click **Search**.
- Follow the “Grant Access to RBC NextLogic” instructions to complete granting access to a secondary Program Administrator.

# Grant access to RBC NextLogic

## Create a user profile

1. Scan the employee listing to verify whether the employee already has a profile.
2. Click **Add New Employee** (bottom-left).

### Employee Administration

View your organization's employee details

Search

Back

Please define a search for the employees you wish to view

[Add new employee](#)

Fill in the following details in the **Insert Personal Details** window:

### VISA Insert Personal Details

Employee ID	<input type="text"/>	Group and Role Membership	▼
First Name	<input type="text"/>	Charge Group	<input type="text"/>
Last Name	<input type="text"/>	Report Group	<input type="text"/>
Middle Name	<input type="text"/>	Manager Details	▲
Email Address	<input type="text"/>	Delegation	▲
Email Address 2	<input type="text"/>	User Details	▲
Phone Number	<input type="text"/>		
Company Unit	<input type="text"/>		
Home Country Code	<input type="text"/>		
Date Terminating	<input type="text"/>		

Undo Save

- Employee ID
- First name
- Last name
- Email address

3. Open the **Group & Role Memberships** tab on the right side.
4. In the **Report Group** drop-down menu, select **Administrator Reports**.
5. Open the **User Details** tab.
6. In the **username** field, enter the user's email address.

**Optional:** Need to link the user to another commercial card product? Simply email [rbccommercialcards@rbc.com](mailto:rbccommercialcards@rbc.com) to request multi-instance access.

7. Click **Save**. Within two hours the employee will receive system-generated emails, one with their new username and one with their temporary password.

### VISA Insert Personal Details

Employee ID	<input type="text"/>	Group and Role Membership	▼
First Name	<input type="text"/>	Charge Group	<input type="text"/>
Last Name	<input type="text"/>	Report Group	<input type="text"/>
Middle Name	<input type="text"/>	Manager Details	▲
Email Address	<input type="text"/>	Delegation	▲
Email Address 2	<input type="text"/>	User Details	▲
Phone Number	<input type="text"/>		
Company Unit	<input type="text"/>		
Home Country Code	<input type="text"/>		
Date Terminating	<input type="text"/>		

Complete your authentication by entering your password.

### VISA Authenticate

Enter your password

## Allocate administrator rights

1. Select **Search** on the right side of the employee search screen.
2. Search for the newly created employee by entering the account details OR by selecting **Search**.
3. Scan the employee listing and locate the newly created employee profile.
4. Click the **employee details** icon under **Actions** on the right side of the row.

Employee Administration Search  
View your organization's employee details Back


Employees matching search criteria

<input type="checkbox"/> Employee Name	Access Level	Last Login	Actions
<input type="checkbox"/> Antanette Mattheiss	Administrator	09/13/2023 14:21:01	

5. Complete your authentication by entering your password.

6. The **Personal Details Report** window will pop up.

Personal Details Report  
Antanette Mattheiss



Report Groups

Reports

- Personal Details
- Employees
- Access Rights
- Audit History
- Security
- Mobile Devices
- Dashboards Access

### Personal Details

#### Antanette Mattheiss - Personal Details Edit ..

Employee ID	1
Username	vscepJAdmin1
Company Unit	Headquarters
Phone Number	-
Email Address	user@demo.com
Date Added	10/06/2021
Date Modified	08/05/2022
Date Terminating	-


#### Manager Details

Manager	-	Edit ..
Manager 2	-	Edit ..
Manager 3	-	Edit ..
Manager 4	-	Edit ..
Manager 5	-	Edit ..
Manager 6	-	Edit ..

[Remove Employee Record](#)

7. Select **Access Rights** from the left-side menu.

Personal Details Report  
Antanette Mattheiss



Report Groups

Reports

- Personal Details
- Employees
- Access Rights
- Audit History
- Security
- Mobile Devices
- Dashboards Access

### Access Rights

#### Administration

[Remove Administrator Rights](#)

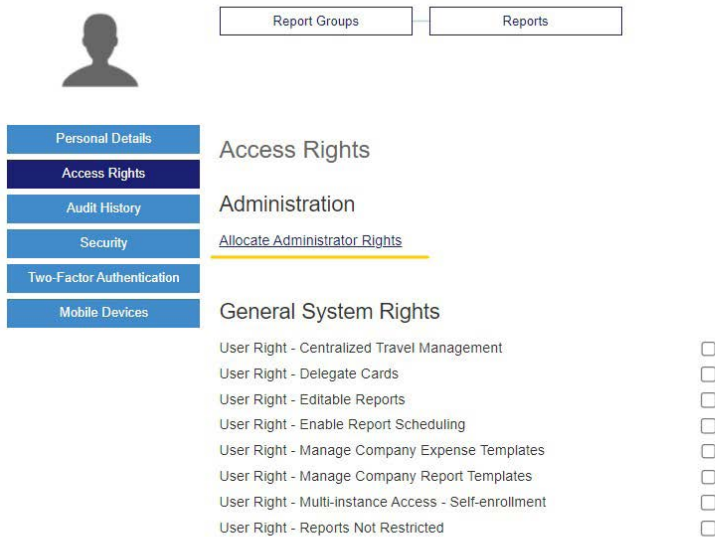
#### Administration Overview Access

- Admin - Employee Administration
- Admin - Export Charge Code Interface File
- Admin - Report Groups
- Admin - Reports
- Admin - Supplier Management

#### Administration Access

- Admin - Card Account Management
- Admin - Data Analysis
- Admin - Data Download
- Admin - Email Services
- Admin - Employee Setup Assistant
- Admin - Refresh Interfaces
- Admin - The Vault

8. Click the **Allocate the Administrator Rights** link.



The screenshot shows a user profile page with a navigation menu on the left and a main content area. The navigation menu includes: Personal Details, Access Rights (highlighted), Audit History, Security, Two-Factor Authentication, and Mobile Devices. The main content area is titled 'Access Rights' and contains a sub-section 'Administration' with a link 'Allocate Administrator Rights' highlighted in yellow. Below this link is a list of user rights with checkboxes:

User Right	Checkbox
User Right - Centralized Travel Management	<input type="checkbox"/>
User Right - Delegate Cards	<input type="checkbox"/>
User Right - Editable Reports	<input type="checkbox"/>
User Right - Enable Report Scheduling	<input type="checkbox"/>
User Right - Manage Company Expense Templates	<input type="checkbox"/>
User Right - Manage Company Report Templates	<input type="checkbox"/>
User Right - Multi-instance Access - Self-enrollment	<input type="checkbox"/>
User Right - Reports Not Restricted	<input type="checkbox"/>

Please note you may not have the required access level or rights to view all the rights associated to this employee.

**Optional:** Uncheck the first box – Admin – Employee Administration – if you do not want the user to see the Employee Administration page or manage employee access.

9. Click the **red “x”** in the top right to close the window.

## Assign access rights in Card Management (optional)

1. Return to the **Employee Administration** page and locate the newly created employee profile.
2. Click **Employee Details** on the right side of the row. Now that the user is set up with administrator rights, Card Management is available to them.
3. Select **Card Management** from the left-side menu.
4. The **Card Management Rights 2.0** section will open; choose the options you would like to give the new user access to by clicking the adjacent slider name. You have the option to set the account threshold by populating the fields with a value.

**VIEW ONLY:** If you intend to grant view-only rights in Card Management, then you need to check the following:

- Manage Accounts (*mandatory to access the Card Management section*)
- View Card (*to view current balances and pending authorizations*)
- Refresh Card
- View Authorization/Declined Transactions

5. Click the **red “x”** on the top right to close the window.

Here is a listing of all the available access rights in Card Management

Access Rights	Description
Create Card Account	Users can access the Create Card Account screen and order a card.
View Card Account	Users can view the list of cards on the Card Management Search Results screen.
Update Card Account – Account Information	Users can edit cardholder information at the individual level or for multiple accounts.
Update Card Account – Account Limits	Users can edit Account Limits at the individual level or for multiple accounts.
Update Card Account – MCC Group	Users can limit access to certain merchant types (Merchant Category Code (MCC) Group).
Close Account	Users can cancel an individual or multiple cards and view the account status code.
Refresh Card Account	Users can access the details on a card in real-time.
View Authorized/Declined Transactions	Users can view a summary of authorized or declined transactions.
Manage Card Accounts	The Manage Card Accounts right must be granted if an employee needs access to view transactions, order or update cards.
Manage Card Controls	Users can manage and view cardholder card controls.

## Delegate accounts

The Account Delegation Report serves to delegate users to view all or as many accounts as required.

1. Follow the navigation path from RBC NextLogic:  
**Reports > Company Administration > Account Delegation**
2. Click **Search**.
3. Check the boxes on the right for each account listed that you intend the user to be able to view.

**Note:** You may only check up to 20 cards at a time.

4. Scroll down and click **Delegate Selected Accounts**.
5. Search for the user by their first name, last name or employee ID.
6. Click **Search**.
7. Locate the user in the table and click the icon to assign the employee to view the corporate account.
8. Click the **red “x”** in the top right to close the window.

# Two-factor authentication

## Summary of two-factor authentication

Two-factor authentication is a method of verifying a user's identity by requiring them to authenticate using two components (i.e. factors), each of which must be from a different authentication category. The two factors must be independent of each other such that if one of the factors is compromised, the reliability of the other factor is not.

The authentication code is generated via any of the following channels:

- The **Visa Spend Clarity Enterprise** mobile app
- An email sent to the **email address** specified in the user's profile
- A **third-party authentication application** of the user's choice that supports the Time-based One-Time Password (TOTP) algorithm such as Google Authenticator, Authy, Duo Mobile, LastPass Authenticator and others.

## First-time registration for two-factor authentication

1. Open a web browser and go to <https://enterprise.spendclarity.visa.com/>.
2. On the Welcome to Visa Spend Clarity for Enterprise page, enter your username and password, then click **Log in**.
3. If this is your first login you may be prompted to enter your "memorable word" prior to proceeding to register for two-factor authentication.

**Note:** If you forget your memorable word, click **View Memorable Word Reminder**. It will show you the question you've chosen to help you remember your answer. After three tries, you will be locked out and will need to reset your password and memorable word.

**VISA** Spend Clarity | Enterprise English (US)

Welcome to Visa Spend Clarity  
for Enterprise

Username

Password

Log In [Forgotten your password?](#)

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## Set up two-factor authentication – Visa Spend Clarity Enterprise mobile app

After your username and password are accepted, the Enable Two-Factor Authentication window will appear. This is where you choose the authentication method to use when accessing the application. In this case, it suggests the Visa Spend Clarity Enterprise mobile app. If you have not done so already, **download and install** the mobile app.

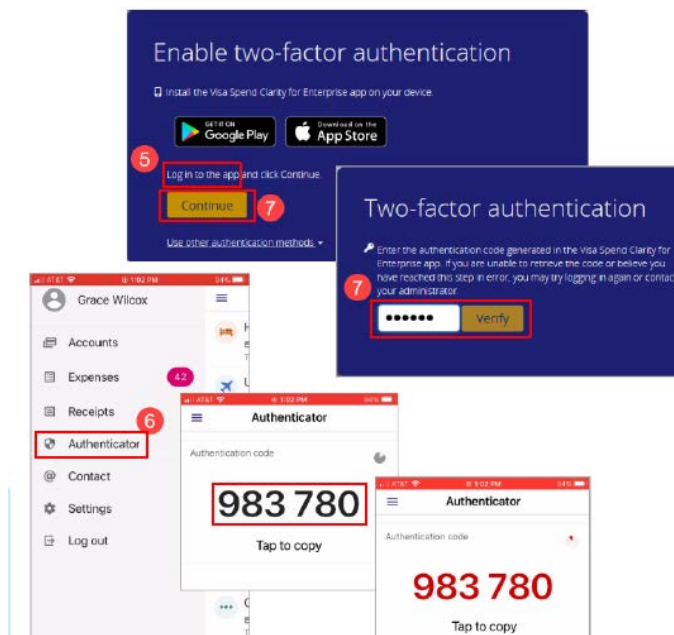
If you're using a mobile web browser to set up two-factor authentication:

1. Open and log into the Visa Spend Clarity Enterprise app on your mobile device.
2. Tap the **Options** menu.
3. Tap **Authenticator**. An authentication code will appear in the mobile app for 30 seconds, then a new one will be automatically generated.
4. Tap the code to copy it to the mobile device clipboard.



### HELPFUL TIP

A small stopwatch icon in the upper-right corner of the Authenticator screen shows how long the code is still valid for. The authentication code will turn red when it is nearing expiration.



If you're using a desktop web browser:

1. Click **Continue**.
2. Enter the **authentication code** currently displayed in the mobile app.
3. Click **Verify**.

Your registration for the Visa Spend Clarity Enterprise mobile app is now complete.

## Set up two-factor authentication – Email

Email delivery of authentication codes is also a supported option for 2FA in RBC NextLogic.

If your bank has configured Email as the default method for retrieving authentication codes, after your username and password are accepted, the Enable Two-Factor Authentication window will appear, informing you that an authentication code has been sent to the email address in your profile.

1. Open your email and copy-paste or type the authentication code in the text box on the login screen.  
Emailed codes are valid for 10 minutes unless a new code is requested, or your login session times out.
2. Click **Verify**.

Your registration by email is now complete. For all future logins to RBC NextLogic, you will be asked to enter your username and password, and repeat the steps above.



### HELPFUL TIP

If you haven't verified a code after 1 minute, click the link to have the email resent.

## Troubleshooting two-factor authentication – Email method ONLY

<p><b>Gmail</b></p>	<ol style="list-style-type: none"> <li>1. Select <b>Contacts</b> from the options on the left side of the Gmail Inbox.</li> <li>2. Select <b>Create Contact</b> from the top menu.</li> <li>3. Enter <a href="mailto:do-not-reply@enterprise.spendclarity.visa.com">do-not-reply@enterprise.spendclarity.visa.com</a> in the primary email box.</li> <li>4. Select <b>Save</b>.</li> </ol>
<p><b>Outlook 2003/2007/ Express</b></p>	<ol style="list-style-type: none"> <li>1. Open the email from <a href="mailto:do-not-reply@enterprise.spendclarity.visa.com">do-not-reply@enterprise.spendclarity.visa.com</a>.</li> <li>2. In the toolbar options at the top, click the <b>Safe Lists</b> drop-down menu. <b>Note:</b> This is located in the <b>Junk Email</b> section.</li> <li>3. Add the sender's domain (<a href="mailto:do-not-reply@enterprise.spendclarity.visa.com">do-not-reply@enterprise.spendclarity.visa.com</a>) to the Safe Senders List.</li> <li>4. Click <b>OK</b>.</li> </ol>
<p><b>Outlook.com</b></p>	<ol style="list-style-type: none"> <li>1. Open the email from <a href="mailto:do-not-reply@enterprise.spendclarity.visa.com">do-not-reply@enterprise.spendclarity.visa.com</a>.</li> <li>2. Click the three dots, and then click <b>Add to Safe Senders</b>.</li> <li>3. Click <b>OK</b>.</li> </ol>
<p><b>Apple Mail</b></p>	<ol style="list-style-type: none"> <li>1. Click <a href="mailto:do-not-reply@enterprise.spendclarity.visa.com">do-not-reply@enterprise.spendclarity.visa.com</a> in the header of the message you're viewing.</li> <li>2. Click <b>Add</b> to finish.</li> </ol>

### Yahoo! Mail

1. Open the email message from [do-not-reply@enterprise.spendclarity.visa.com](mailto:do-not-reply@enterprise.spendclarity.visa.com).
2. Click **Add to Contacts** next to [do-not-reply@enterprise.spendclarity.visa.com](mailto:do-not-reply@enterprise.spendclarity.visa.com).
3. In the **Add Contact** pop-up, add additional information if needed.
4. Click **Save** to finish.

## Employee entered the authentication code sent by email and could not log in – Login failed message

If an employee received an authentication code but could not log in, the employee account could be locked due to inactivity or repeatedly inputting the wrong password/authentication code.

### Check if employee account is locked:

1. Access **Spend Management > Administration > Overview > Administration Overview > Employees**.
2. Search for the employee user profile.
3. If the lock icon is red, click the **icon** to unlock.

### If the account is not locked and the employee could not log in, review the security record to check if an invalid password was entered:

1. Access **Spend Management > Administration > Overview > Administration Overview > Employees**.
2. Search for the employee user profile.
3. Click the **icon** on the right > blue **Security** tab on the left.
4. A list of login attempts and statuses will appear.

### Resetting employee password:

1. To reset the employee's password, return to the RBC NextLogic screen.
2. Click the **key icon** beside the employee profile.
3. Enter a new password and click **Save**.

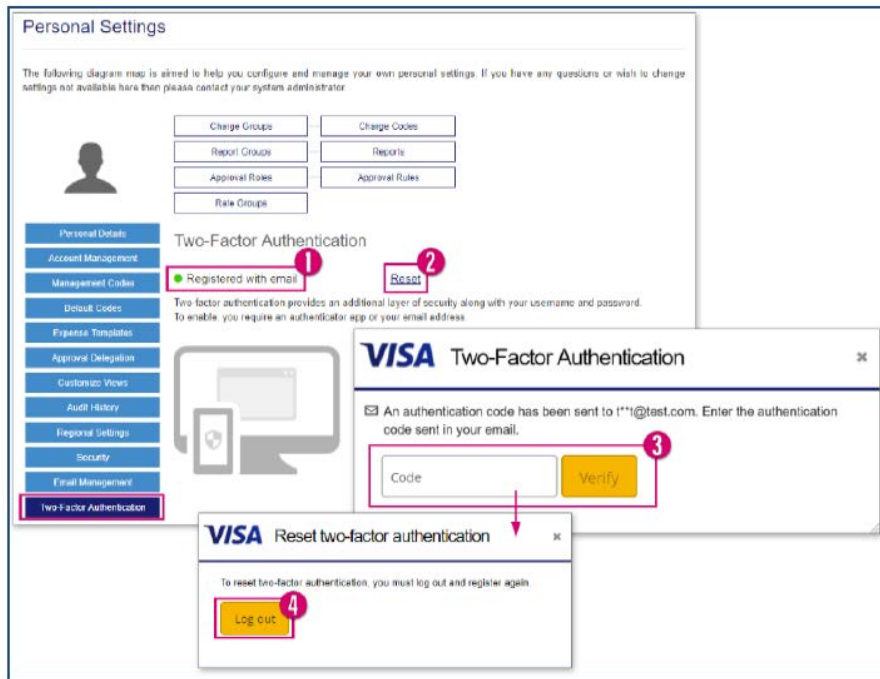
**Note:** Different logic is used to generate the codes sent via email than for those generated in the mobile app. The authentication code delivered by email will always be an eight-digit numeric code rather than a six-digit numeric code.

If you prefer not to use email to authenticate, click **Use Other Authentication Methods** to select the Visa Spend Clarity Enterprise app or a third-party authenticator app, then follow the on-screen instructions. Whichever method you register with will be the method used for future logins to the desktop application.

## Change your two-factor authentication method

You can change the way you receive authentication codes by resetting two-factor authentication. This deletes your current registration method and allows you to choose a different method.

1. Click **Profile menu > Personal Settings > Two-Factor Authentication**. On the Two-Factor Authentication screen, you will see displayed your current two-factor authentication method.
2. Click **Reset**.

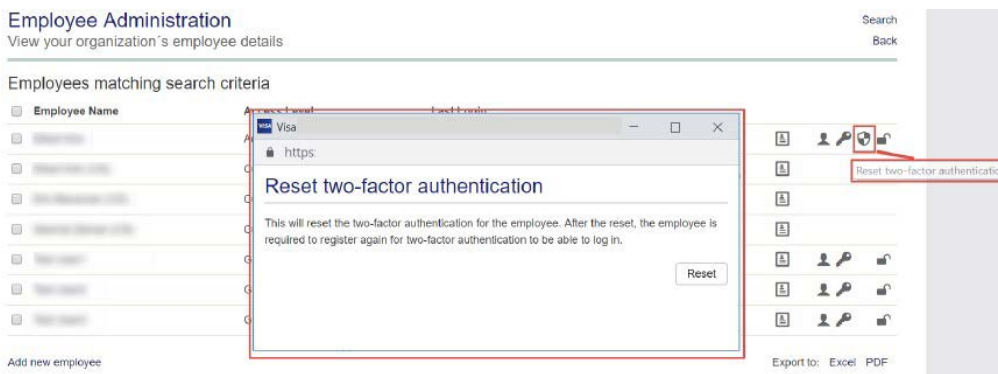


3. You will be required to confirm the reset by entering an authentication code from your currently registered method. Click **Verify**.
4. When the authentication code is confirmed, you will be required to log out to complete the reset.  
**Note:** *If you do not click **Log out** the reset will be incomplete, and you will not be prompted to re-register.*
5. After you log out to complete the reset, you may then **re-register** for an alternate method by following the instructions above.

## Administrator reset of a user's two-factor authentication

Administrators may reset a user's method of two-factor authentication as needed. This can prove useful in the event a user has lost their currently registered mobile device, or in multiple other circumstances.

1. Access the Employee Administration section of Administration Overview.
2. In the Employees search results, find the relevant employee and click the shield icon.

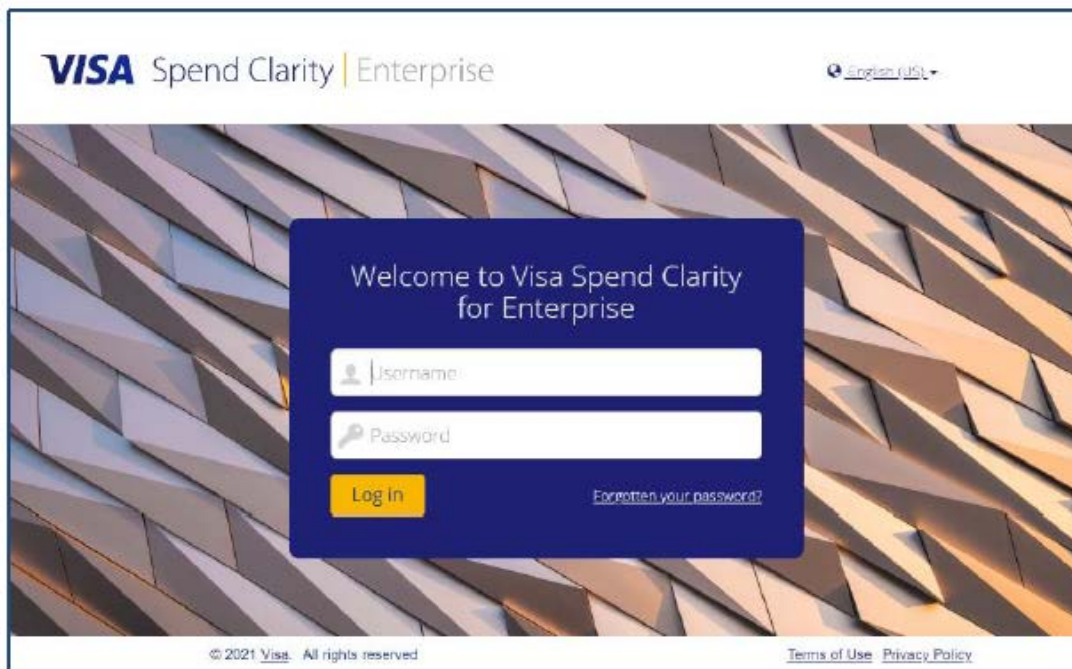


3. Click **Reset**.
4. The user can now **re-register** for an alternate method by following the instructions above.

## Ongoing usage of two-factor authentication for login

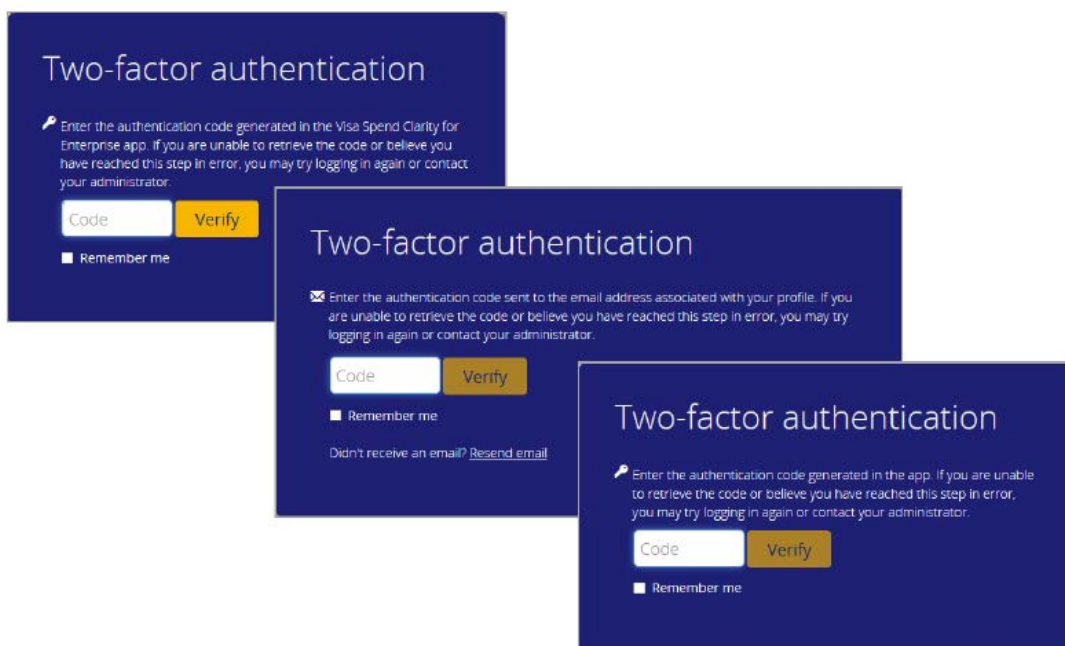
### Step 1: Enter your username and password

1. Open a web browser and go to <https://enterprise.spendclarity.visa.com/>.
2. On the Welcome to Visa Spend Clarity for Enterprise page, enter your username and password, then click **Log in**.

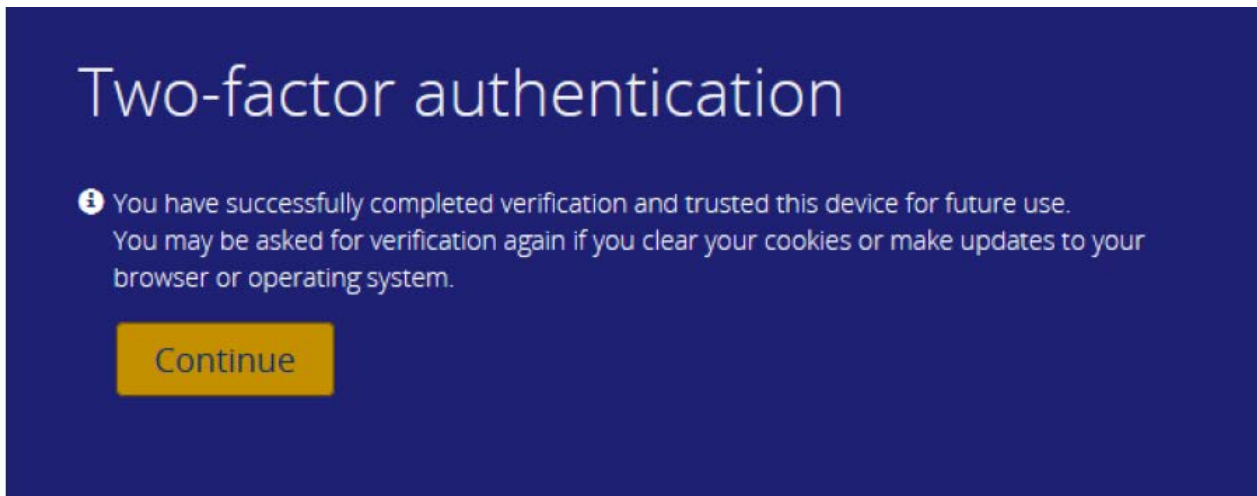


### Step 2: Enter your two-factor authentication code

1. After entering your username and password, you will be presented with the code verification screen for your chosen authentication method.



2. Open the chosen method to retrieve the authentication code and enter it in the Code text box on the desktop application login screen.
3. Click **Remember me** to have the application remember your browser+device combination. This will allow you to authenticate using only your username and password for subsequent logins within a 45-day grace period.
4. Click **Verify**.
5. If you selected **Remember me**, a confirmation message will appear on screen informing you that you have successfully registered the browser+device combination. Click **Continue** to complete the login process.



**HELPFUL TIP**

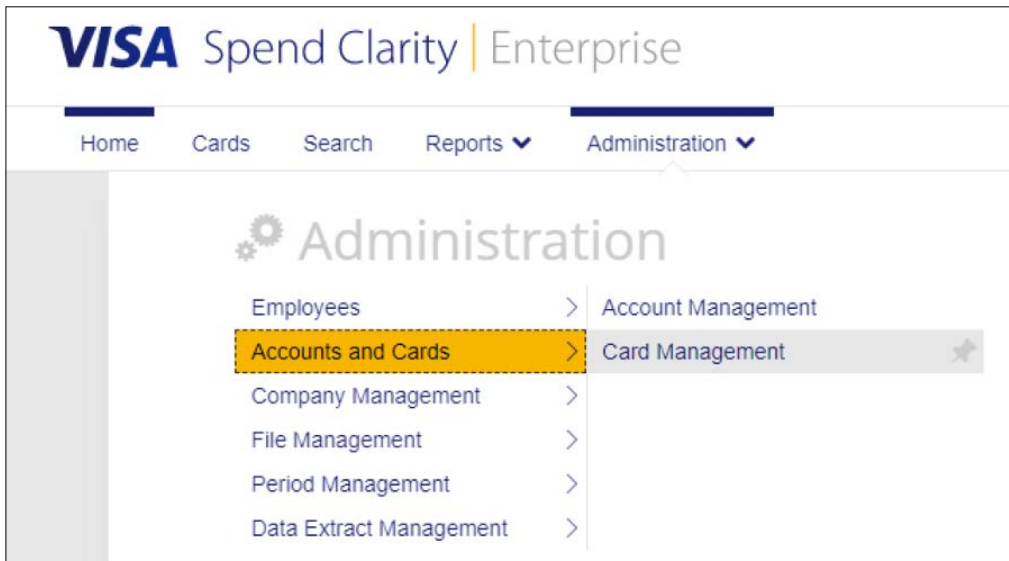
You will also be notified by email about your device being registered. The email includes the operating system and the browser you selected the Remember me option in.

Future logins within the 45-day grace period will only require your username and password. After the grace period expires, you will be prompted for a 2FA code on your next login and will have the option to remember your browser+device combination again.

# Generic functions

## Card Management menu

1. Go to **Administration > Accounts and Cards > Card Management**







## Navigation sidebar

2. A navigation sidebar is located in the left frame of the **Card Management** screens.

When you hover over an icon, the sidebar and icon will expand.

3. Click to go to the screen:

 Create	Opens <b>Card Management - Create Card Account</b> screen.
 Summary	Opens <b>Card Management Summary</b> screen, with a summary of cards, sorted by account status.
 Search Results	Opens <b>Card Management</b> screen, with the list of search results.
 Card History	Opens the <b>Card History</b> screen.

## Summary

The **Summary** screen is the default home page for Card Management functions.

The screenshot shows the VISA Spend Clarity Enterprise interface. The top navigation bar includes Home, Accounts, Cards, Search, Reports, and Administration. The left sidebar has a 'Create' button and links for Summary, Search Results, and Card History. The main content area is titled 'Card Management' and contains a summary of card status for 'DEF Financial'.

DEF Financial	
You are managing 358 cards	
Open	324
Closed	3
Expired	31

## Search Results

The **Search** function can be accessed by clicking **Search** in the top right corner. It is also available on the **Search Results** page.

This screenshot is identical to the one above, showing the 'Summary' screen of the VISA Spend Clarity Enterprise interface. It displays the 'Card Management' section with a summary for 'DEF Financial' showing 358 cards managed, broken down into 324 Open, 3 Closed, and 31 Expired cards.

You can search by **card account** or **employee** information.

**Note:** A card must be linked to an employee in the expense management tool in order for the employee details to show.



# Company dashboards

## What are company dashboards?

Company dashboards are designed to provide the Program Administrator a comprehensive overview of their company spend through insightful data and visual representation of key portfolio spend analytics.

**Program Administrators have access to eight dashboards – each providing strategic data and intuitive controls for easy filtering and drilldown capability across your company:**

- **Merchant Spend View** – See how much money your company has spent on different merchant categories and groups in the last 12 months.
- **Department Spend View** – Understand department spend patterns and gain insight into spend volumes and transaction counts in granular detail during the last 12 months.
- **Transaction Details View** – Get a breakdown of overall spend by transaction type and currency at a company, department or cost-centre level during the last 12 months.
- **Employee Spend View** – Get a detailed view of spend by individual employees and their managers during the last 12 months.
- **Company Transaction Details for 36 Months** – Detailed totals of standard transaction types across the company.
- **Company Employee Spend Details for 36 Months** – Spend and transaction totals by employee in the company.
- **Company Department Spend Details for 36 Months** – A company-wide view of spend and transaction counts for each company unit that has been configured.
- **Company Merchant Spend Details for 36 Months** – A visual analysis of spend for merchant categories and groups across the company.

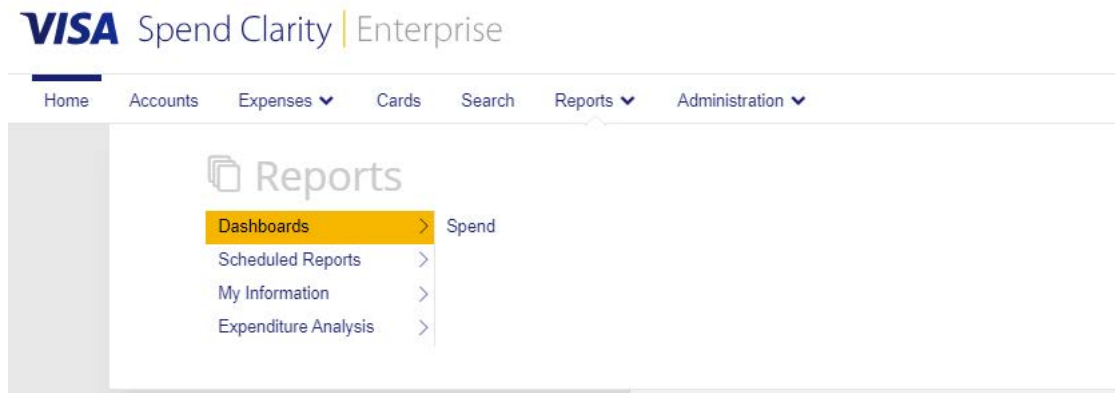
### Date ranges

- The Merchant Spend View, Department Spend View, Transaction Detail View and Employee Spend View dashboards present data for the past 12 full months.
- The 36-month dashboards allow you to select custom date ranges based on periods of up to three years. Options include Financial Year Start, Year, Quarter and/or Month.

**Note:** *Please note dashboard access must be assigned by the lead Program Administrator to an assigned user. There is one dashboard license assigned to a company; the dashboard license may need to be reassigned when a user requires dashboard privileges. Additionally, once the license is transferred, the user must log out and log back in to see the dashboard feature.*

## How to access and view the dashboards

1. Select **Reports** from the top menu.



2. Select **Dashboards** then **Spend**.

The Dashboards screen will display all the accessible dashboards.

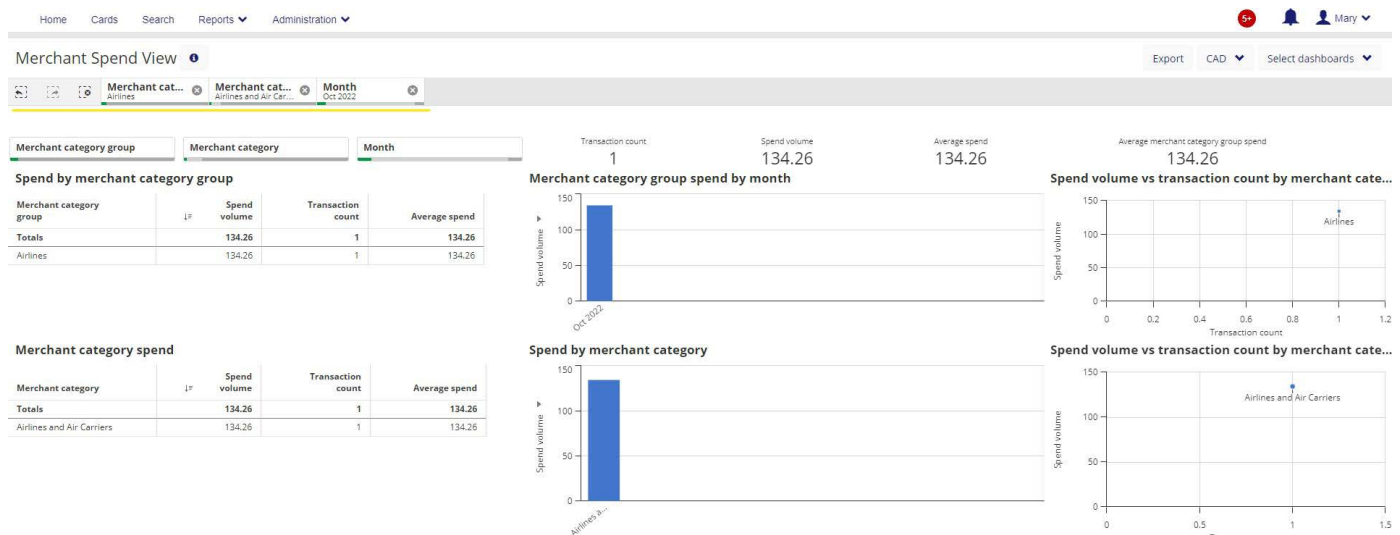
Dashboards



3. Double click on the dashboard where you want to enter the dashboard data.

## How to extract information

1. Select the information you wish to have extracted and the file format.



## 2. Select Export.

Home Cards Search Reports Administration

Merchant Spend View Export CAD Select dashboards

Merchant cat... Airlines Merchant cat... Airlines and Air Car... Month Oct 2022

Merchant category group Merchant category Month

Transaction count: 1 Spend volume: 134.26 Average spend: 134.26 Average merchant category group spend: 134.26

**Spend by merchant category group**

Merchant category group	IF	Spend volume	Transaction count	Average spend
Totals		134.26	1	134.26
Airlines		134.26	1	134.26

**Merchant category group spend by month**

**Spend volume vs transaction count by merchant cate...**

**Merchant category spend**

Merchant category	IF	Spend volume	Transaction count	Average spend
Totals		134.26	1	134.26
Airlines and Air Carriers		134.26	1	134.26

**Spend by merchant category**

**Spend volume vs transaction count by merchant cate...**

Home Cards Search Reports Administration

Merchant Spend View Export

No selections applied

Merchant category group Merchant category Month

Transaction count: 2.25k Spend volume: 1.45M Average spend: 647.65

**Spend by merchant category group**

Merchant category group	IF	Spend volume	Transaction count	Average spend
Totals		1,453,963.42	2,245	647.65
Airlines		541,334.77	674	803.17
Hotels And Motels		420,911.70	338	1,245.30
Professional Services		92,947.61	113	822.55
Retailer/Finance/Commer...		50,173.73	734	753.67

**Merchant category group spend by month**

**Spend by merchant category**

Export

Graph or table: Spend by merchant category group

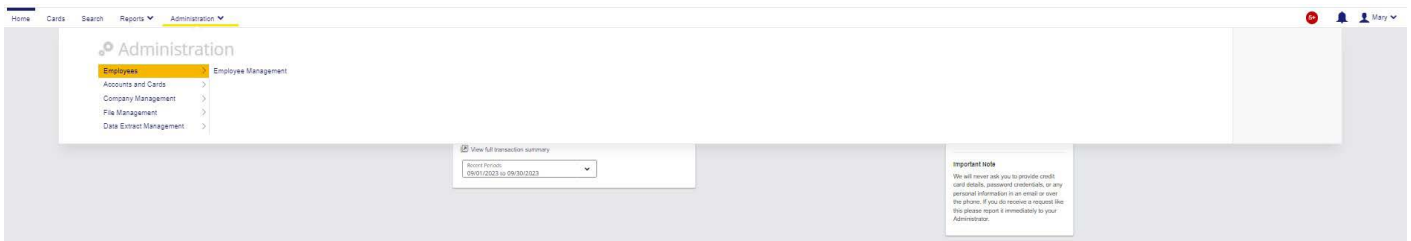
File format: XLSX

Export Cancel

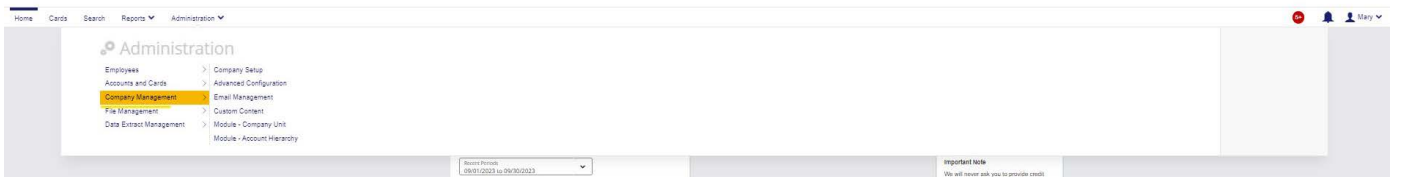
## 3. Open and save the file.

# How to find the dashboard license

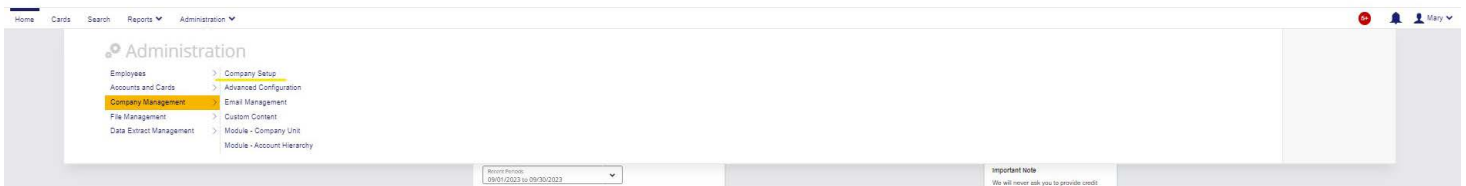
1. Select **Administration** from the home menu.



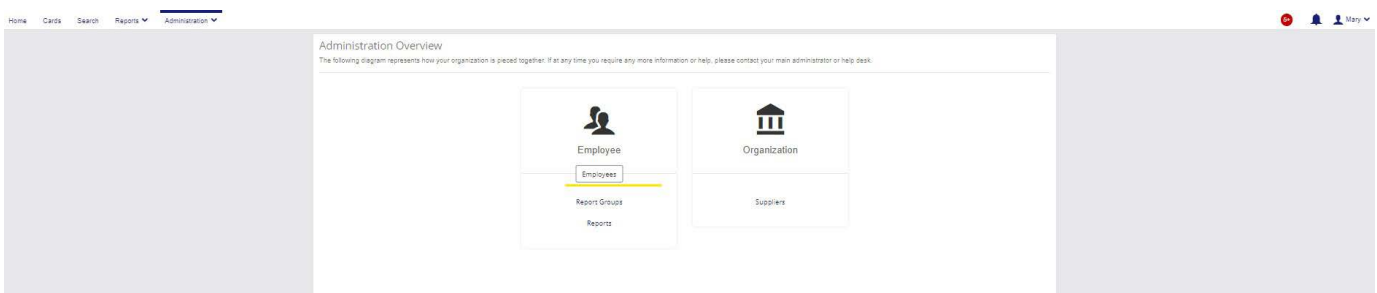
2. Select **Company Management**.



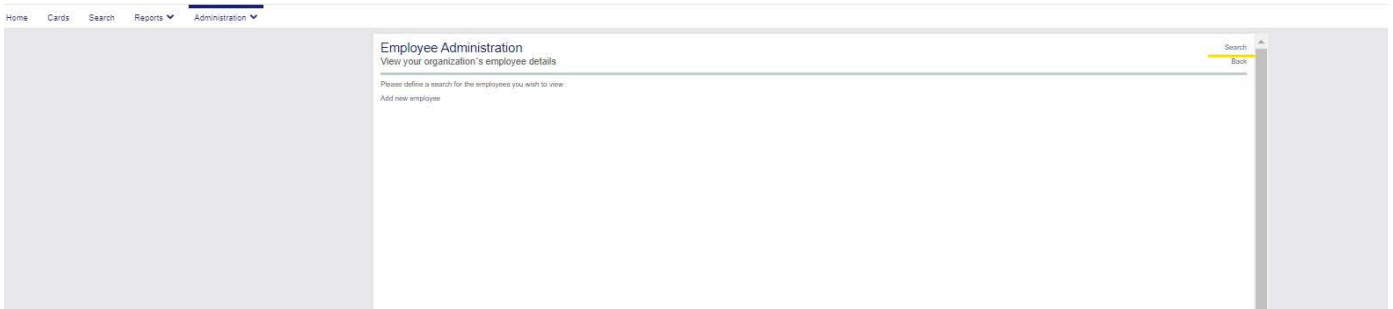
3. Select **Company Setup**.



4. Select **Employees**.



5. Select **Search** on the right-hand side.



## 6. Select Group & Role Memberships.

**VISA Employee Search**

Employee ID	<input type="text"/>
Employee First Name	<input type="text"/>
Employee Last Name	<input type="text"/>
Username	<input type="text"/>
Company Unit	[All] <input type="button" value="v"/>
Account Number (Last 4 Digits)	<input type="text"/>
Account Holder With	<input type="text"/>

**System Login Rights**

Yes       Password Expired  
 No         Exclude Account Locked  
 All

**Lock Status**

Locked by Date  
 Manually Locked  
 Forgotten Password

Return Results:

Group by Company Unit:

Selected Unit Only:

Export mode:

Manager Details	<input type="button" value="v"/>
Group & Role Memberships	<input type="button" value="v"/>
Charge Group	<input type="text"/>
Report Group	<input type="text"/>
Approval Role	<input type="text"/>
Management Level	<input type="text"/>
Rate Group	<input type="text"/>
Login Disclaimer Acceptance	<input type="button" value="v"/>
Date Ranges	<input type="button" value="v"/>
Additional Fields & Sort Order	<input type="button" value="v"/>

## 7. Select Report Group then Standard Dashboards.

**VISA Employee Search**

Employee ID	<input type="text"/>
Employee First Name	<input type="text"/>
Employee Last Name	<input type="text"/>
Username	<input type="text"/>
Company Unit	[All] <input type="button" value="v"/>
Account Number (Last 4 Digits)	<input type="text"/>
Account Holder With	<input type="text"/>

**System Login Rights**

Yes       Password Expired  
 No         Exclude Account Locked  
 All

**Lock Status**

Locked by Date  
 Manually Locked  
 Forgotten Password

Return Results:

Group by Company Unit:

Selected Unit Only:

Export mode:

Manager Details	<input type="button" value="v"/>
Group & Role Memberships	<input type="button" value="v"/>
Charge Group	<input type="text"/>
Report Group	Standard Dashboards
Approval Role	<input type="text"/>
Management Level	<input type="text"/>
Rate Group	<input type="text"/>
Login Disclaimer Acceptance	<input type="button" value="v"/>
Date Ranges	<input type="button" value="v"/>
Additional Fields & Sort Order	<input type="button" value="v"/>

## 8. Click Search.

### VISA Employee Search

Employee ID

Employee First Name

Employee Last Name

Username

Company Unit

Account Number (Last 4 Digits)

Account Holder With

---

**System Login Rights**

Yes  Password Expired

No  Exclude Account Locked

All

---

**Lock Status**

Locked by Date

Manually Locked

Forgotten Password

---

Return Results

Group by Company Unit

Selected Unit Only

Export mode

**Manager Details** ▼

---

**Group & Role Memberships** ▲

---

Charge Group

Report Group

Approval Role

Management Level

Rate Group

---

**Login Disclaimer Acceptance** ▼

---

**Date Ranges** ▼

---

**Additional Fields & Sort Order** ▼

Search

If the dashboard license is assigned, the user information will appear.

### Employee Administration

View your organization's employee details

[Search](#)  
[Back](#)

#### Employees matching search criteria

<input type="checkbox"/> Employee Name	Access Level	Last Login	Actions
<input type="checkbox"/> Mary Lou	Administrator	10/19/2023 17:53:42	<a href="#">E</a> <a href="#">P</a> <a href="#">U</a> <a href="#">G</a>

[Add new employee](#)

[Export to: Excel PDF HR Format](#)

## How to assign the dashboard license

1. Once the user's profile appears, select the **employee details card** on the right-hand side.

### Employee Administration

View your organization's employee details

[Search](#)  
[Back](#)

#### Employees matching search criteria

<input type="checkbox"/> Employee Name	Access Level	Last Login	Actions
<input checked="" type="checkbox"/> Mary Lou	Administrator	10/19/2023 17:53:42	<a href="#">E</a> <a href="#">P</a> <a href="#">U</a> <a href="#">G</a>

[Add new employee](#)

[Export to: Excel PDF HR Format](#)

2. Click on **Employee Details**.

### Employee Administration

View your organization's employee details

[Search](#)  
[Back](#)

#### Employees matching search criteria

<input type="checkbox"/> Employee Name	Access Level	Last Login	Actions
<input checked="" type="checkbox"/> Mary Lou	Administrator	10/19/2023 17:53:42	<a href="#">E</a> <a href="#">P</a> <a href="#">U</a> <a href="#">G</a>

[Add new employee](#)

[Export to: Excel PDF HR Format](#)

### 3. Select **Dashboards Access**.

The screenshot shows a user profile page with a navigation menu on the left and two main sections: 'Personal Details' and 'Manager Details'. The 'Personal Details' section is active and shows the following information:

Employee ID	23	
Username	amartinbc	
Company Unit	Operations	
Phone Number	-	
Email Address	ashleigh.martin@rbc.com	
Date Added	07/24/2023	
Date Modified	09/19/2023	
Date Terminating	-	

The 'Manager Details' section shows a list of managers with their names and edit links:

Manager	Cleodis Sorsby	Edit ..
Manager 2	Antanette Matheiss	Edit ..
Manager 3	-	Edit ..
Manager 4	-	Edit ..
Manager 5	-	Edit ..
Manager 6	-	Edit ..

4. Under **Dashboards Access**, you will be able to toggle the access on and off. This will deactivate the license for the selected employee.

The screenshot shows the 'Dashboards Access' section of the user profile page. The navigation menu on the left has 'Dashboards Access' selected. The main content area shows a toggle switch for 'User Right - Access Dashboards', which is currently turned on (green).

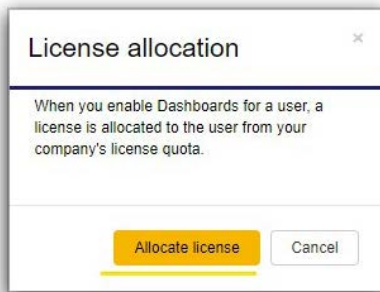
To reassign the dashboard to another user:

1. Close the Employee Details window.
2. You can either search for the employee by entering the employee details or select **Search**, which will display all the employees.
3. Once you locate the employee's name, select the **employee details card**.
4. Select **Dashboards Access**.

This screenshot is identical to the previous one, showing the 'Dashboards Access' section with the 'User Right - Access Dashboards' toggle switch turned on (green).

5. Turn the **User Right – Access Dashboards** option on. It will turn green.

6. A pop-up window will appear that says, “License allocation to complete the reassignment”. Select **Allocate License**.



7. The user who just received access to the license will have to log out and log back in to be able to see the dashboards.

## How to access the mobile app


### What is the Visa Spend Clarity Enterprise app?

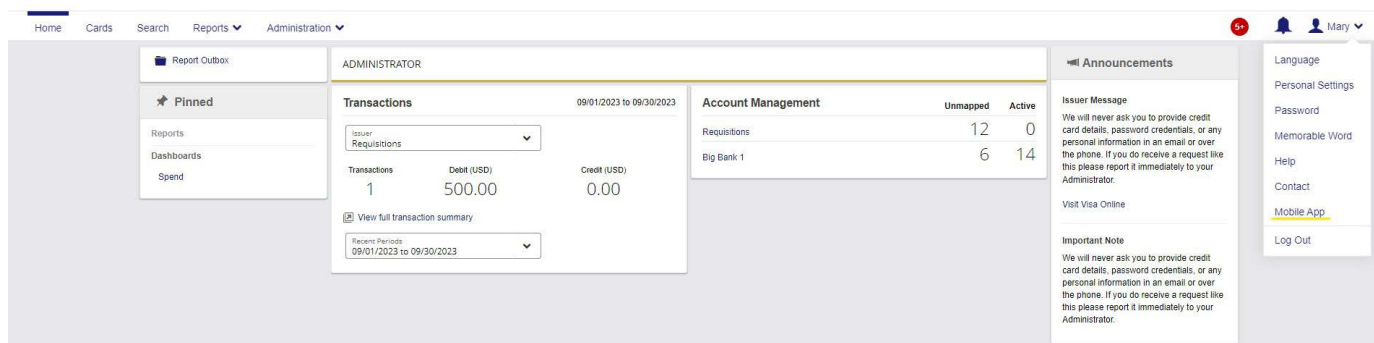
The Visa Spend Clarity Enterprise app offers **cardholders** the ability to access their RBC NextLogic accounts on their mobile device. The app provides the functionality to access the following details at your fingertips:

- Credit limit
- Available credit
- Transactions and authorizations
- Card account details

**Note:** The Visa Spend Clarity Enterprise app is for **cardholder use only**. Program Administrators are unable to action any administrative functions in the mobile app. All account management activities must be processed through the desktop application.

### How to download the app

1. On the right-hand side, the username will appear beside the following icon: . Click on the **name** and a drop-down menu will appear.





2. Select **Mobile App**.



## Spend Clarity Enterprise

Manage your spend on the go with Visa Spend Clarity for Enterprise



Scan the QR code below to log in to your account.

This code is available for five minutes.



3. Select your mobile device's app store and continue the downloading process according to your mobile device requirements. Additionally, you can use the QR code provided to download the app or search for the Visa Spend Clarity Enterprise app in your app store.
4. Once the app is downloaded to your mobile device, you can use your **RBC NextLogic credentials** to log in.

# Adding an employee to RBC NextLogic – with no card assigned

## Create a new employee profile in RBC NextLogic

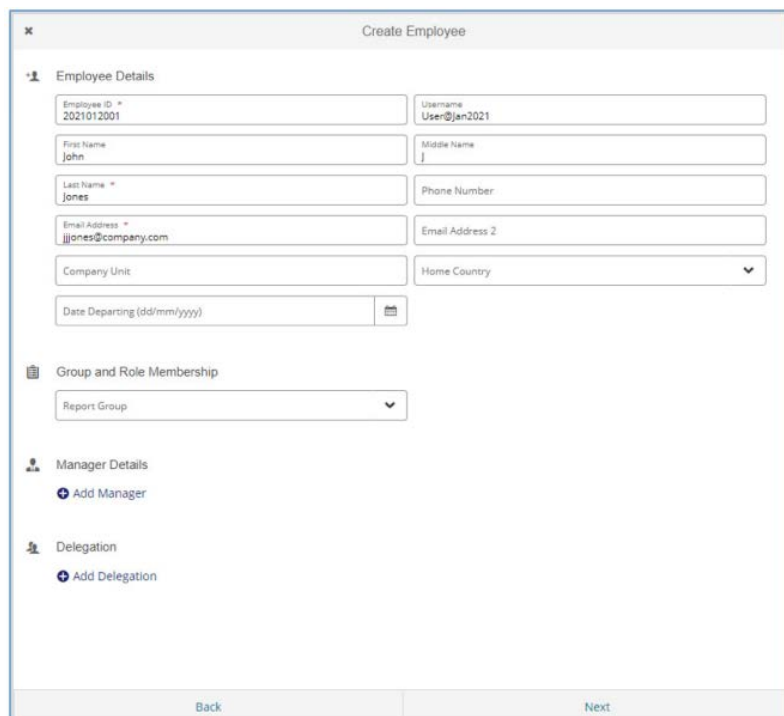
1. Select **Create Employee**.



The screenshot shows a window titled "Create Card Account". Inside, it asks "Who do you want to map to?". There is a search input field with the placeholder text "First name, last name, or employee ID" and a magnifying glass icon. Below the search field are two buttons: "Create employee" and "No employee".

2. Fill in the details for the new employee. Required elements are marked with a red asterisk (\*). You can pick and choose the settings according to your company policy.

**Note:** If you want to give the employee online access, fill in the username field with a distinct ID such as an email address. Then, select **Individual Reports** from the Group and Role Membership dropdown menu. If you leave the username field blank, the employee will not have online account access and you will not be required to select from the Group and Role Membership drop-down menu.



The screenshot shows a "Create Employee" form with several sections:

- Employee Details:** Fields for Employee ID (\*), Username, First Name, Middle Name, Last Name (\*), Phone Number, Email Address (\*), Email Address 2, Company Unit, Home Country, and Date Departing (dd/mm/yyyy).
- Group and Role Membership:** A dropdown menu for Report Group.
- Manager Details:** An "Add Manager" button.
- Delegation:** An "Add Delegation" button.

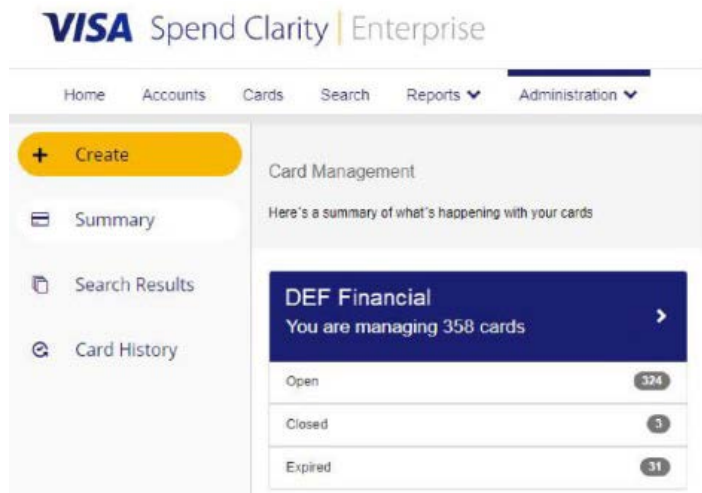
At the bottom of the form are "Back" and "Next" buttons.

3. Select **Next**. A message in the lower-right corner will confirm your successful profile creation, and the Create Card Account form will be displayed with the details of the newly created profile.
4. Complete the card order portion of the form by manually filling in all the required data (fields marked with a red asterisk).

## Card management

# Create a card account (plastic card)

1. To access the Create Card Account screen, click the **Create** button in the left-hand side menu.



2. You will be prompted to search for an existing employee (with a profile in RBC NextLogic) you wish to map the card to. If an employee does not yet have a profile in the system, you can choose **Create Employee** to add one. This step will also map the new card account to the employee you create. You can also create a new card account without mapping to any employee profile by selecting **No Employee**.

The screenshot shows the 'Create Card Account' form. The title is 'Create Card Account'. Below the title is the question 'Who do you want to map to?'. There is a search input field with the placeholder text 'First name, last name, or employee ID' and a search icon. Below the search field are two buttons: 'Create employee' and 'No employee'.

**Note:** Program Administrators who do not have permission to create or manage employee profiles will skip past this step. For new cardholders who do not have an employee profile yet, we recommend you choose the **Create Employee** option.

## Create Card Account screen

The **Create Card Account** screen will be in “create” mode, ready for you to enter the data required to create a new card account. If you chose an existing employee profile or created a new employee profile in the previous step, the relevant details will be pre-populated in the form.

The screenshot displays the 'Create Card Account' form with the following sections and fields:

- Company:** A dropdown menu showing '149' and a 'Load Template' button.
- Cardholder Details:**
  - First Name: Aaron
  - Last Name: Carlson
  - Cardholder Name: Aaron Carlson
  - Company Name on Card: [Empty]
  - Email Address: aaron@company.com
  - Business Employee ID: 2021012001
  - Work Phone: [Empty]
  - Mobile Phone: [Empty]
  - Account Type: B
  - Is this a physical card?:
  - Number of cards requested: 1
  - Type of card requested: CASHBACK AMF \$75 1ST CARD
  - Language: [Empty]
- Cardholder Address:**
  - Country: Canada
  - Address Search: [Empty]
  - Address Line 1: [Empty]
  - Address Line 2: [Empty]
  - City: [Empty]
  - State/Province: [Empty]
  - ZIP/Postal Code: [Empty]
- Account Info:**
  - Company Number: 0200149
- Account Limits:**
  - Credit Limit: [Empty]
  - Single Purchase Limit: [Empty]
  - Add Limit: [Button]
- MCC Groups:** Select
- Comments:** A text area with a 500 character limit indicator.

At the bottom of the form are two buttons: 'Save Template' and 'Reset'.

## Card account information

Card Management ▲

Search By:  Card Account Information  Employee Information

Card number (last 4 digits) Account Status Open Card Account Last Name Card Account First Name

Last Updated From (dd/mm/y... Last Updated To (dd/mm/yyyy) Account Hierarchy Search Reset

The search date range must be no more than 90 days.

## Employee information

Card Management ▲

Search By:  Card Account Information  Employee Information

Card number (last 4 digits) Account Status Open Employee Last Name Employee First Name

Last Updated From (dd/mm/y... Last Updated To (dd/mm/yyyy) Company Unit Employee ID Search Reset

The search date range must be no more than 90 days.

The Card Management screen will display the following card account search results:

- Cardholder name
- Card account number
- Credit limit
- Account status
- Last updated

The displayed columns can be changed using the **Select Columns** button. The selected options are saved under the administrator's profile and will be displayed each time they log in.

Select	Cardholder Name	Card Account Number	Credit Limit	Account Status	Last Updated	Details
<input type="checkbox"/>	J Jared Dupont	****_****_****_0019	10000	Open	29/08/2019 05:30	Details
<input type="checkbox"/>	G Grace Wilcox	****_****_****_0018	10000	Open	29/08/2019 05:30	Details
<input type="checkbox"/>	M Matthew Boyd	****_****_****_0012	10000	Open	29/08/2019 05:30	Details
<input type="checkbox"/>	J Jasmine Reese	****_****_****_0007	10000	Open	29/08/2019 05:30	Details
<input type="checkbox"/>	J Jamie McCarthy	****_****_****_0006	10000	Open	29/08/2019 05:30	Details
<input type="checkbox"/>	J Jimmy Diaz	****_****_****_0010	10000	Open	29/08/2019 05:30	Details
<input type="checkbox"/>	B Bruce Hodges	****_****_****_0017	10000	Open	29/08/2019 05:30	Details
<input type="checkbox"/>	J Juan Lopez	****_****_****_0009	10000	Open	29/08/2019 05:30	Details
<input type="checkbox"/>	R Byron Gibson	****_****_****_0015	10000	Open	29/08/2019 05:30	Details

## Completing the Create Card Account screen

1. To use a saved template to pre-fill relevant fields, select the **Load Template** link in the upper right-hand corner.

Create Card Account

Company \*  
88888

Load Template

2. Fill in the **cardholder details**, taking care to complete all mandatory fields marked with an asterisk (\*).

Cardholder Details

First Name \*  
Aaron

Last Name \*  
Carlson

Cardholder Name \*  
Aaron Carlson

Company Name on Card

Email Address \*  
abcarlson@company.com

Unique Employee ID \*  
2021012003

Work Phone \*

Mobile Phone

Account Type  
B

Is this a physical card?

Number of cards requested \*  
1

Type of card requested \*  
CASHBACK AMF \$75 1ST CARD

Language \*

- Addresses are validated using an API. First, select the **country** (e.g. Canada) from the drop-down list. Then, begin typing an address in the **Address Search** box. The system will provide a list of matching addresses to choose from. Selecting an address from the list populates the remaining address fields. After the fields are populated, you may edit them, if necessary.

The screenshot shows a form titled "Cardholder Address" with a location pin icon. It contains four input fields: "Country" (a dropdown menu with "Canada" selected), "Address Line 1", "City", and "ZIP/Postal Code". To the right of these fields is an "Address Search" box. Below the search box, a list of five matching addresses is displayed, with the first one, "77 King St W, Toronto, ON, Canada", highlighted in grey.

The screenshot shows the same "Cardholder Address" form, but now all fields are populated. The "Country" dropdown shows "Canada". The "Address Search" box contains "77 King St W, Toronto, ON, Canada" with a magnifying glass icon. The "Address Line 1" field contains "77 King Street West". The "City" field contains "Toronto". The "State/Province" dropdown shows "ON". The "ZIP/Postal Code" field contains "M5K 1A2".

- Set the **Account Info**, if necessary, and assign **account limits**. The maximum credit limit that you can set for a card depends on:
  - Options determined by your financial institution
  - The corporate limit set in the company profile
  - Your individual threshold as defined in your permissions

You may choose to add a single purchase limit or other velocity limits for the card account you are creating.

The screenshot shows two sections of the form. The "Account Info" section has a "Company Number" dropdown menu with "0000149" selected. The "Account Limits" section has two input fields: "Credit Limit" and "Single Purchase Limit". Below these fields is a button labeled "Add Limit" with a plus sign icon.

- You may assign **Merchant Category Code (MCC) Groups** by selecting them from those defined in the company profile.

The screenshot shows a button labeled "MCC Groups" with a plus sign icon, and a "Select" button next to it.

6. You may add free-form **comments** (up to 500 characters) by typing in the text box. These comments will be saved and visible in the Audit Report.

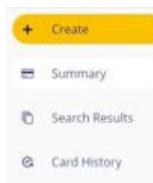


A screenshot of a user interface showing a text input field for comments. The field is labeled 'Comments' and has a speech bubble icon to its left. Below the text box, it indicates '500 characters left'.

### Return to the Summary screen

To return to the “home” of the Card Management functionality, which is the **Summary** screen:

1. On the **Create Card Account** screen, click the **X** at top right of the frame.
2. On the **Card Management** and **Card Search – Results** screens, click the **Summary** button in the navigation panel in the left frame.



### Validate mandatory fields

Mandatory fields are marked with an **asterisk (\*)**.



If you click **Submit**, any blank mandatory fields will be highlighted in red and an error message will be displayed.

The screenshot shows a 'Create Card Account' form with several fields highlighted in red, indicating validation errors. The errors are as follows:

- First Name \***: This is a required field.
- Last Name \***: This is a required field.
- Cardholder Name \***: This is a required field.
- Company Name on Card**: (No error message shown, but field is present)
- Email Address \***: This is a required field.
- Unique Employee ID \***: This is a required field.
- Work Phone \***: This is a required field.
- Mobile Phone**: (No error message shown, but field is present)
- Account Type**: (No error message shown, but field is present)
- Is this a physical card?**: (No error message shown, but field is present)
- Number of cards requested \***: (No error message shown, but field is present)
- Type of card requested \***: (No error message shown, but field is present)
- Language \***: This is a required field.

The 'Cardholder Address' section includes:

- Country \***: Canada (No error message shown, but field is present)
- Address Search \***: (No error message shown, but field is present)
- Address Line 1 \***: (No error message shown, but field is present)
- Address Line 2**: (No error message shown, but field is present)

### Validate individual fields

Validation occurs when you **change** the “state” of a field. This means no validation occurs if you click in and then out of a field without adding or removing anything. However, if you enter incorrect data, or enter data and then remove it from a mandatory field, validation will occur.

#### Validation currently occurs in the following cases:

- Length and format of phone number fields are incorrect
- Invalid email address format
- Invalid characters
- Credit limit values:
  - Cannot be more than the company’s credit limit
  - Cannot contain decimals
  - Cannot be blank
- Invalid date format or outside date range

When selecting dates using the calendar tool, the range of dates is restricted according to rules applying to the date (e.g. start date cannot be earlier than today’s date and end date cannot be earlier than one day after the start date).

## MCC Groups

### What are MCC Groups?

Merchant Category Code (MCC) Groups are four-digit numbers assigned to businesses by credit card companies to identify the types of goods or services they provide. MCC Group information is set up when a card account is created but is not updated until 24 hours after the card is successfully created.

**Note:** The MCC functionality is available on the **Create Card Account** screen and the **Card Management Edit** screen.

### There are three different types of MCC Groups

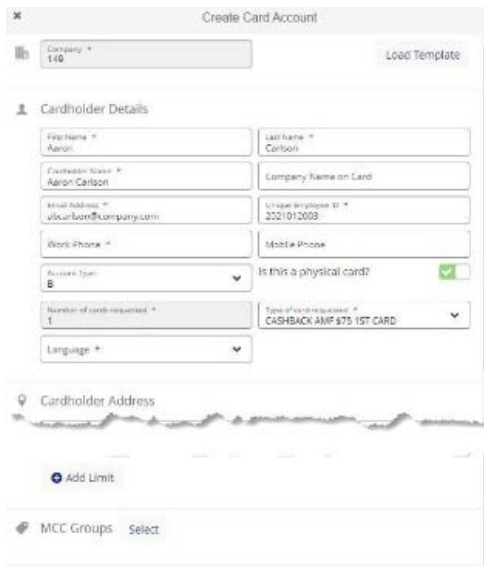
- **Default MCC Groups** – There can be one or more default MCC Groups set up for a company. These MCC Groups are applied automatically to a new card account when it is created, but the properties of these groups, such as the single purchase limits and velocity settings, cannot be updated by the Program Administrator. These groups will not be visible to the Program Administrator if they are correctly set up by the bank administrator for the company.
- **Custom MCC Groups** – These are MCC Groups that have been set up for the company and can be assigned to card accounts by the Program Administrator.



- **Unknown MCC Groups** – Sometimes MCC Groups are set on the card account by the processor, but they are not part of the MCC Groups set up for the company, nor are they the default MCC Groups. These groups cannot be edited by the Program Administrator, but they can be removed from the card if they do not apply.

## How to add an MCC Group

1. On the **Create Card Account** pane, scroll to the MCC Groups section.



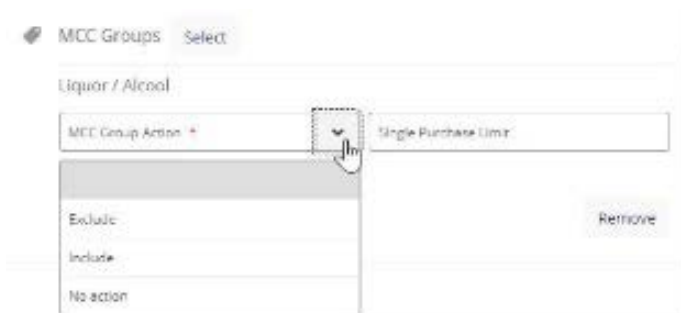
The screenshot shows the 'Create Card Account' form. At the top, there is a 'Company' dropdown set to '140' and a 'Load Template' button. Below this is the 'Cardholder Details' section with fields for First Name (Aaron), Last Name (Carlson), Cardholder Name (Aaron Carlson), Company Name on Card, Email Address (a.carlson@company.com), Unique Employee ID (2021012003), Work Phone, and Mobile Phone. There are also dropdowns for Account Type (B), Number of cards requested (1), and Language. A checkbox 'Is this a physical card?' is checked. Below this is the 'Cardholder Address' section with an 'Add Limit' button. At the bottom, the 'MCC Groups' section is visible with a 'Select' button.

2. To apply a custom MCC Group from the company profile, select a group to add from the drop-down list.



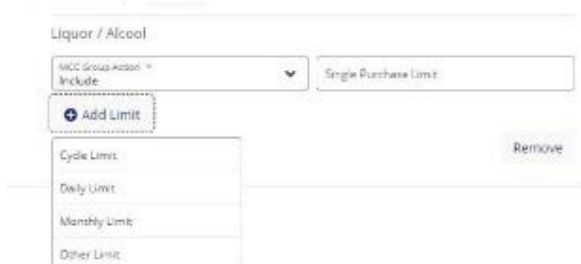
The screenshot shows the 'MCC Groups' dropdown menu. The 'Select' button is highlighted, and the dropdown list is open, showing the following options: Travel / Voyage, Liquor / Alcohol, CASINO N/A, MISC-ALL/IE, CASH-ARGNT, and GAS FUEL.

3. Choose the desired **MCC Group Action** from the drop-down list.



The screenshot shows the 'MCC Groups' section with 'Liquor / Alcohol' selected. The 'MCC Group Action' dropdown menu is open, showing the following options: Exclude, Include, and No action. A 'Single Purchase Limit' field is visible to the right of the dropdown, and a 'Remove' button is located below it.

4. Select the type of limit you want to add from the **Add Limit** drop-down list.



The screenshot shows the 'MCC Group Action' dropdown menu with 'Include' selected. The 'Add Limit' button is highlighted, and the dropdown list is open, showing the following options: Cycle Limit, Daily Limit, Monthly Limit, and Other Limit. A 'Single Purchase Limit' field is visible to the right of the dropdown, and a 'Remove' button is located below it.

**Note:** When an MCC Group has been selected from the drop-down list, it is no longer available when you set up the next group. A new MCC Group section, displaying the name of the selected group in the header row, is displayed below the existing group.

### How to delete an MCC Group

1. To delete an MCC Group before the card has been submitted, in the lower-right corner of the group that you wish to delete, click the **Remove** button.



**Note:** There must be at least one authorization control/MCC Group associated to the card. The last active control cannot be deleted. After a card has been successfully created, on the Card Management – Edit screen, you can remove existing MCC Groups by clicking the **Remove** button beside the group.

2. When a group is deleted, the group name is returned to the list of groups available for selection.

### Submit a new card account application

When the user clicks **Submit**:

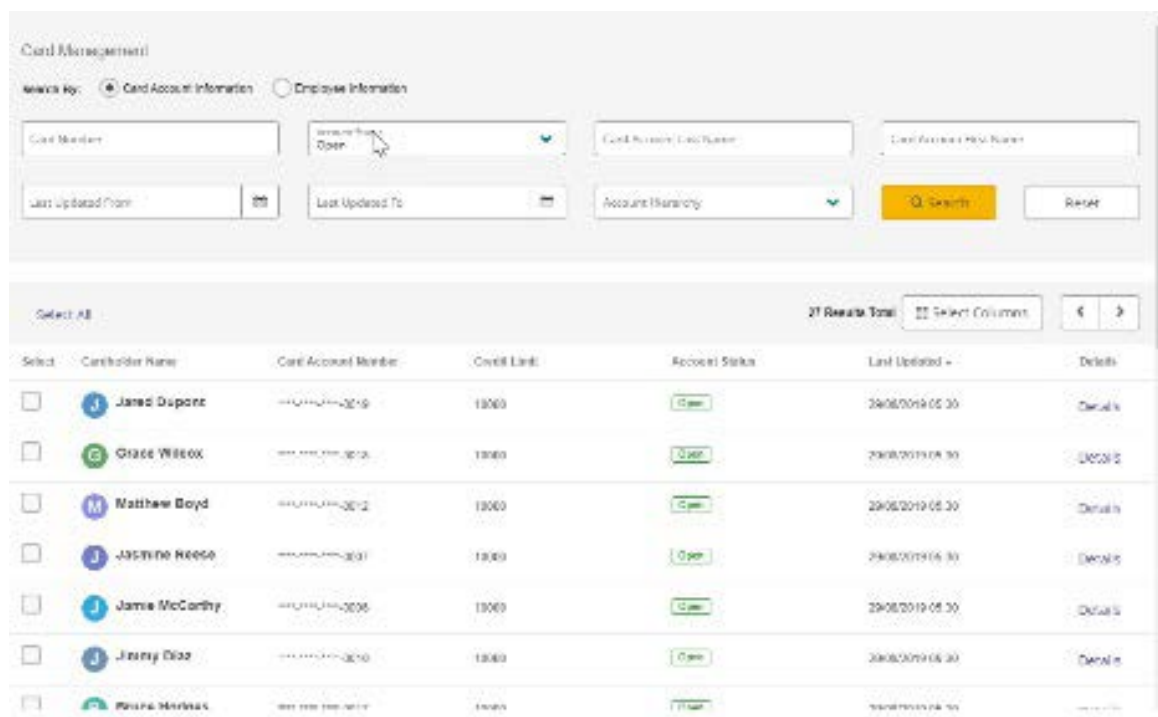
- The screen locks in read-only mode.
- The buttons are greyed out to prevent multiple submissions of the same form.
- A “toaster” message informs the user that the request has been submitted for processing:
  - The **Create Card Account** form is reset to allow you to start creating another card account without going back to the **Card Search** screen. This returns the screen to the original employee mapping/creation pane, then through to the clean “create” state by clicking **Submit**.
  - The user can return to the **Card Search** screen by clicking the **X** in the upper left of the pane, or by selecting the **Search Results** button at the left of the screen.

## View and update card account

On the **Card Management** screen, you can view and update card account details, refresh, request a plastic card and close an account.

### Select a card to update

1. Use the search functionality to locate your card.
2. Click **Details** on the right of the desired record row on the **Search Results** screen to select the card.



The screenshot shows the 'Card Management' interface. At the top, there are search filters for 'Card Account Information' and 'Employee Information'. Below this are input fields for 'Card Member', 'Account Type' (set to 'Open'), 'Card Account Card Number', and 'Card Account Hist. Number'. There are also fields for 'Last Updated From', 'Last Updated To', and 'Account Hierarchy'. A 'Search' button and a 'Reset' button are present. Below the search filters is a table with 27 results. The table has columns for 'Select', 'Cardholder Name', 'Card Account Number', 'Credit Limit', 'Account Status', 'Last Updated', and 'Details'. The table lists several card accounts with their respective details.

Select	Cardholder Name	Card Account Number	Credit Limit	Account Status	Last Updated	Details
<input type="checkbox"/>	Jared Dupont	****-****-2219	1000	Open	29/08/2019 08:30	Details
<input type="checkbox"/>	Grace Wilcox	****-****-2212	1000	Open	29/08/2019 08:30	Details
<input type="checkbox"/>	Matthew Boyd	****-****-2212	1000	Open	29/08/2019 08:30	Details
<input type="checkbox"/>	Jasmine Keese	****-****-2201	1000	Open	29/08/2019 08:30	Details
<input type="checkbox"/>	Jama McCarthy	****-****-2206	1000	Open	29/08/2019 08:30	Details
<input type="checkbox"/>	Jenny Diaz	****-****-2210	1000	Open	29/08/2019 08:30	Details
<input type="checkbox"/>	Phiona Marikak	****-****-2217	1000	Open	29/08/2019 08:30	Details

3. The **Card Details** pane will appear in read-only mode.

Card Details - Jonathan Jones Last updated: 21/01/2022 14:24

**Edit** Refresh History Authorization Summary Close Account

**Card Details**

Account Number: \*\*\*\*-\*\*\*\*-7853

**Cardholder Details**

First Name	Jonathan	Work Phone	8645975672
Last Name	Jones	Mobile Phone	
Cardholder Name	JONATHAN JONES	Is this a physical card?	Yes
Company Name on Card		Number of cards requested	1
Email Address	jones@company.com	Number of cards to reissue	1
Unique Employee ID	2021012001		

**Cardholder Address**

Country	Canada	City	Toronto
Address Line 1	900 Dufferin Street	State/Province	ON
Address Line 2		ZIP/Postal Code	M5H 4E7

**Account Limits**

## Refresh card details

Click **Refresh** to retrieve the latest details for the card account. This will synchronize the screen with the processor.

Card Details - Matthew Boyd

**Edit** Refresh History

## Update card details

**Note:** Remember to refresh a card account before making any changes.

Click the **Edit** button to change the screen to edit mode.

- The Edit and Refresh buttons will be replaced with **Submit** and **Cancel** buttons.
- The applicable fields can now be edited.

Edit Card Details - Jonathan Jones Last updated: 21/01/2022 14:24 ✕

**Submit** **Cancel**

**Card Details**

Account Number: [REDACTED]

**Cardholder Details**

* First Name	Jonathan	* Work Phone	8845975672
* Last Name	Jones	Mobile Phone	
* Cardholder Name	JONATHAN JONES	Is this a physical card?	<input type="checkbox"/>
Company Name on Card		Number of cards requested	1
* Email Address	jones@company.com	Number of cards to reissue	1
* Unique Employee ID	2021012001		

**Cardholder Address**

* Country	Canada	* City	Toronto
Address Search	Type the address to search	State/Province	ON
* Address Line 1	800 Dufferin Street	* ZIP/Postal Code	M5H 4E7
Address Line 2			

## Submit changes

Once all the required fields have been updated, click the **Submit** button to send your changes for processing.

- The screen will lock in read-only mode.
- The **Submit** and **Cancel** buttons will be replaced with the **Edit** button.
- A success message will be displayed when the application has passed the initial validation and can be accepted for processing by the system. This message does not indicate that the updates have been applied at the processor end.

Your application has been submitted for processing. ✕

# Card controls

## What are card controls?

Card controls allow the Program Administrator to control physical cards in real-time to help manage your company's spending policies and ensure compliance with your company's purchasing policies. You can apply card controls to individual cards or groups of cards in your commercial card program.

## How to add controls

1. Select **Cards** at the top of the screen.

The screenshot shows the 'Cards' section of the RBC NextLogic Administrator interface. The top navigation bar includes 'Home', 'Cards', 'Search', 'Reports', and 'Administration'. The user profile 'Mary' is visible in the top right corner. The main content area is divided into several sections:

- Report Outbox**: A section for reporting outbox items.
- Pinned**: A section for pinned reports, dashboards, and spend items.
- ADMINISTRATOR**: A central section with a 'Transactions' table for the period 09/01/2023 to 09/30/2023. The table shows 1 transaction with a debit of 500.00 USD and a credit of 0.00 USD. Below the table is a 'View full transaction summary' link and a 'Recent Periods' dropdown menu.
- Account Management**: A table showing account status for 'Big Bank 1'. It has 6 unmapped and 14 active accounts.
- Announcements**: A section on the right with an 'Issuer Message' and an 'Important Note' regarding the requirement to provide card details, password credentials, or any personal information in an email or over the phone.

2. Select **Cards** on the left side of the screen.

The screenshot shows the 'Cards' section of the RBC NextLogic Administrator interface. The top navigation bar includes 'Home', 'Cards', 'Search', 'Reports', and 'Administration'. The user profile 'Mary' is visible in the top right corner. The left sidebar shows 'Cards' selected. The main content area displays four summary cards:

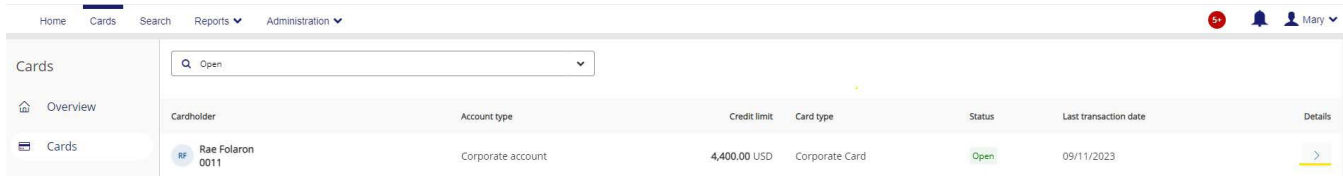
- Unmapped cards**: 6 cards. A 'View' button is present.
- Unused cards**: 0 cards. A 'View' button is present.
- Cards at 80% of spend limit**: 11 cards. A 'View' button is present.
- Cards expiring in 4 weeks**: 0 cards. A 'View' button is present.

Below these cards is a 'Cards status summary' section. It features a donut chart showing the total number of cards (20) and a legend with the following categories and counts:

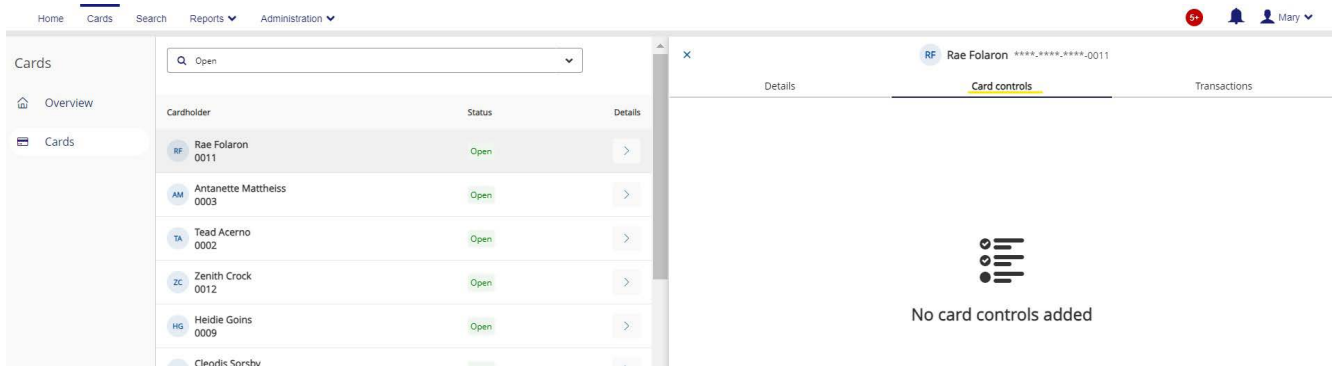
Category	Count
Closed	0
Expired	0
Open	20
Other	0



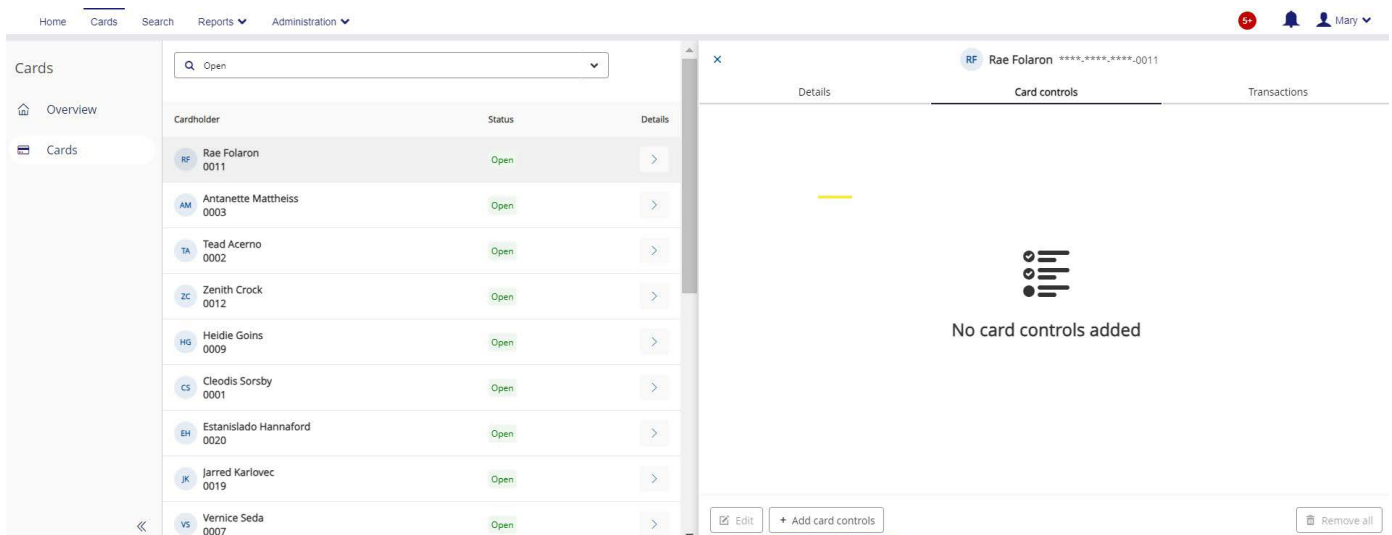
3. Search and select the card you would like to add controls to. Select the **arrow under Details** to open the cardholder details.



4. The cardholder details will appear on the right side in a different screen. Select **Card Controls** at the top of the screen.



5. Click the **Add Card Controls** button to add the card controls.



6. Once you have selected all the required card controls, select **Submit**.

Details      **Card controls**      Transactions

---

### Transaction controls

Block all transactions over specified limit  Remove

Transaction limit \*

**Submit**    + Add card controls      Remove all

## How to remove controls

1. Select **Cards** at the top of the screen.

Home    **Cards**    Search    Reports    Administration

99       Mary

Report Outbox

ADMINISTRATOR

09/01/2023 to 09/30/2023

Transactions	Debit (USD)	Credit (USD)
1	500.00	0.00

[View full transaction summary](#)

Recent Periods: 09/01/2023 to 09/30/2023

Account Management

	Unmapped	Active
Requisitions	12	0
Big Bank 1	6	14

Announcements

**Issuer Message**

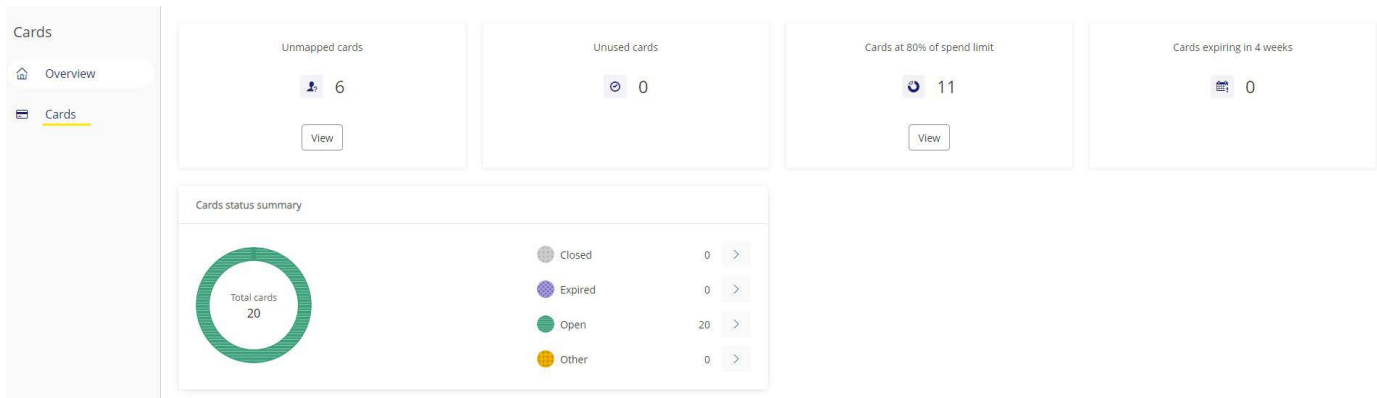
We will never ask you to provide credit card details, password credentials, or any personal information in an email or over the phone. If you do receive a request like this please report it immediately to your Administrator.

[Visit Visa Online](#)

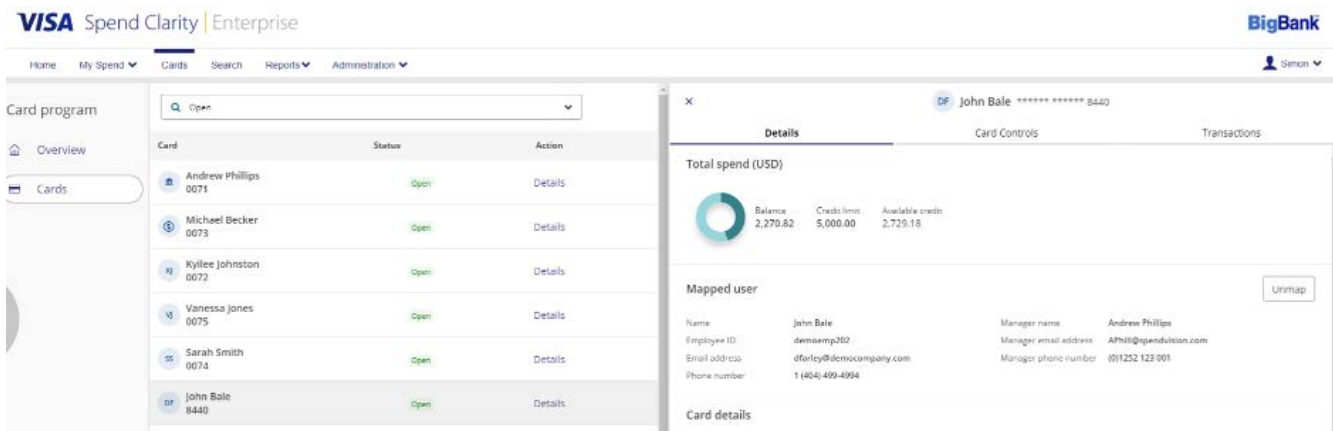
**Important Note**

We will never ask you to provide credit card details, password credentials, or any personal information in an email or over the phone. If you do receive a request like this please report it immediately to your Administrator.

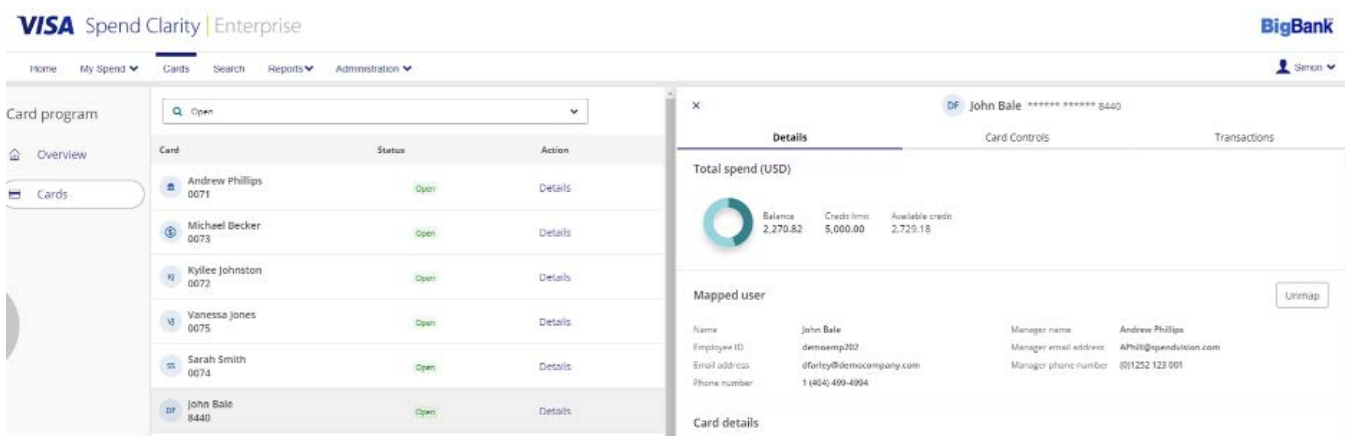
2. Select **Cards** on the left side of the screen.



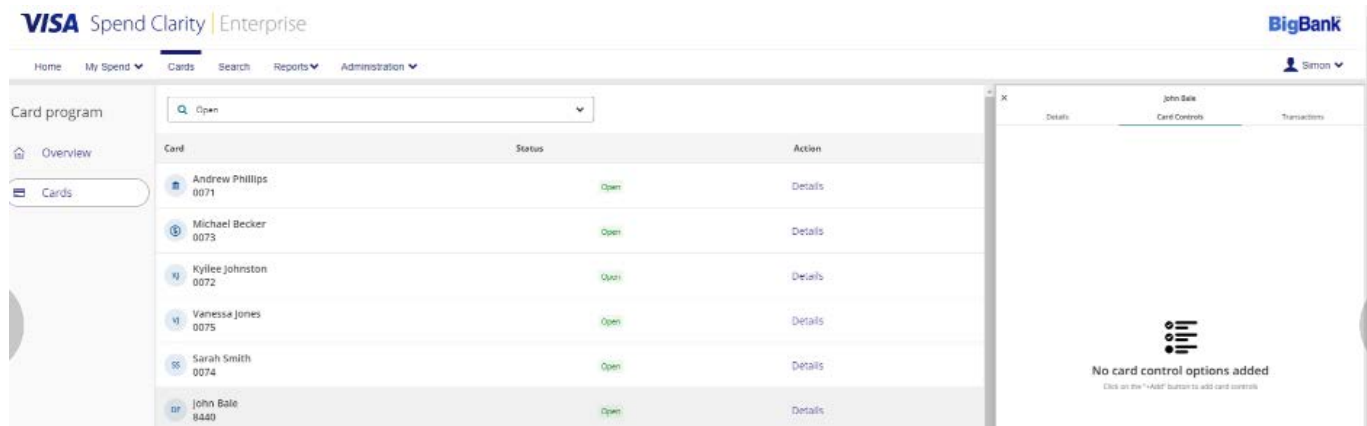
3. **Search and select the card** you would like to remove controls from. Select **Details** under **Action** for the card to open the cardholder details.



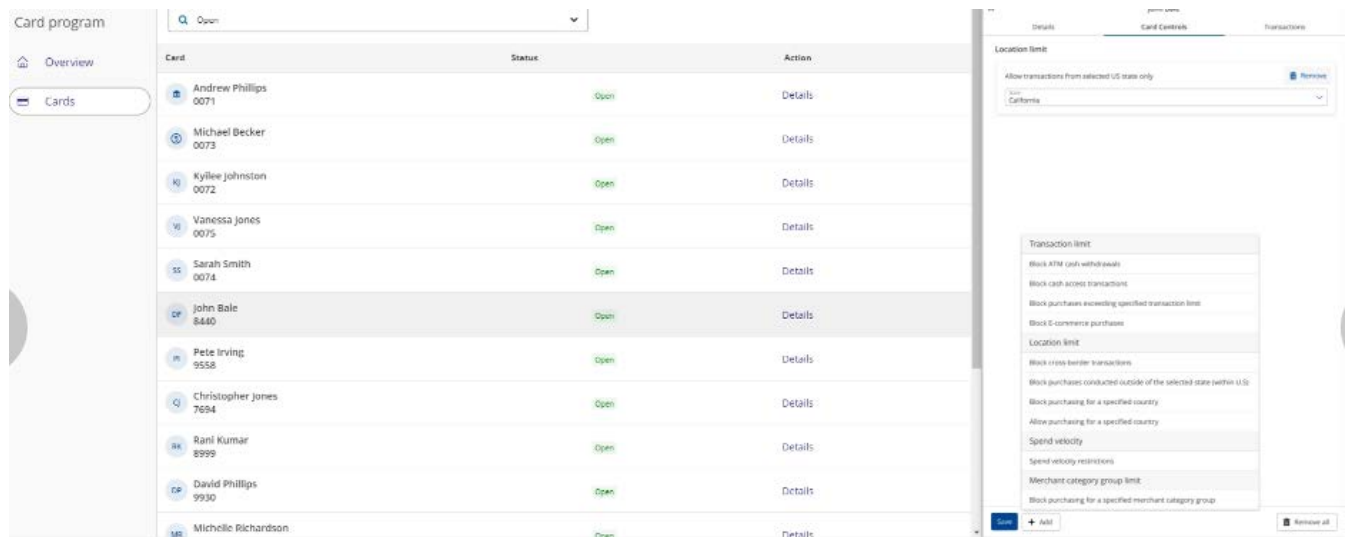
4. The cardholder details will appear on the right side in a different screen.



5. Select **Card Controls** at the top of the screen.



6. If you would like to remove a certain card control, click **Remove**.



7. A separate menu will appear to confirm the deletion. Click **Remove All**.

# Account limits

If you set the Account Info, the Account Limits section will appear.

The screenshot shows a web interface with two main sections: 'Account Info' and 'Account Limits'. In the 'Account Info' section, there is a 'Company Number' field with the value '0000149'. The 'Account Limits' section contains two input fields: 'Credit Limit' and 'Single Purchase Limit'. Below these fields is an 'Add Limit' button, which is highlighted with a dashed box. A dropdown menu is open below the 'Add Limit' button, listing four options: 'Cycle Limit', 'Daily Limit', 'Monthly Limit', and 'Other Limit'.

1. Enter the credit limit you would like to set for this particular card.
2. If your company has a spend control policy such as a **single purchase limit**, which is the most a cardholder can spend on one purchase, or a **daily amount**, which is the most they can spend in one day, you can enter a dollar amount and apply it to all card transactions. The limits will be applied to all transactions, regardless of any spend control set for a merchant type.

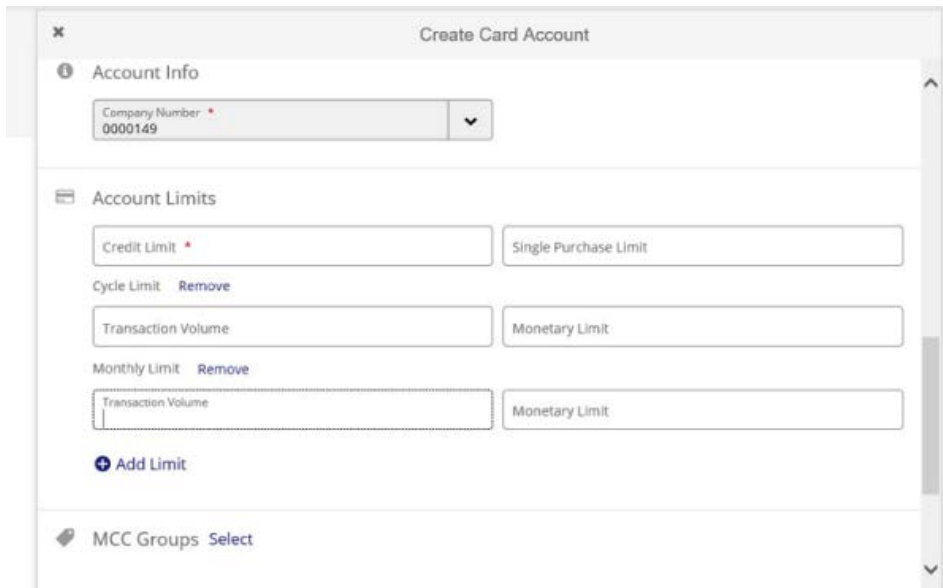
## Spend controls for all card transactions:

- **Single Purchase Limit:** Maximum amount for a single purchase
- **Cycle Amount:** Maximum amount that can be purchased in one billing cycle
- **Cycle Volume:** Maximum number of transactions in one billing cycle
- **Daily Amount:** Maximum amount that can be purchased in a single day
- **Daily Volume:** Maximum number of transactions in a single day
- **Monthly Amount:** Maximum amount that can be purchased in a month
- **Monthly Volume:** Maximum number of transactions in a month
- **Other Amount:** Maximum amount that can be purchased in a custom-defined period
- **Other Volume:** Maximum number of transactions in a custom-defined period

## You can specify the time period as well:

- **Based on Number of Days:** Number of days for which the user-defined controls apply (the count of the number of days starts from the request submission date)
- **Based on Date Range:** Date range (between a start date and end date) during which the user-defined controls apply

3. You can choose the type of limit you want to set in the screen displayed below.



The screenshot shows a web interface titled "Create Card Account". It is divided into several sections:

- Account Info:** Contains a "Company Number" field with the value "0000149" and a dropdown arrow.
- Account Limits:** This section is expanded and contains several input fields:
  - Credit Limit:** A field with a red asterisk, currently empty.
  - Single Purchase Limit:** A field currently empty.
  - Cycle Limit:** A section header with a "Remove" link.
  - Transaction Volume:** A field under Cycle Limit, currently empty.
  - Monetary Limit:** A field under Cycle Limit, currently empty.
  - Monthly Limit:** A section header with a "Remove" link.
  - Transaction Volume:** A field under Monthly Limit, currently empty.
  - Monetary Limit:** A field under Monthly Limit, currently empty.
- Buttons:** An "Add Limit" button with a plus icon is located below the Monthly Limit section.
- MCC Groups:** A section with a "Select" button.



**HELPFUL TIP**

Once spend controls are added to the card, purchases that do not meet the criteria will be declined. For new cards, spend controls will be in effect within 24-48 hours.

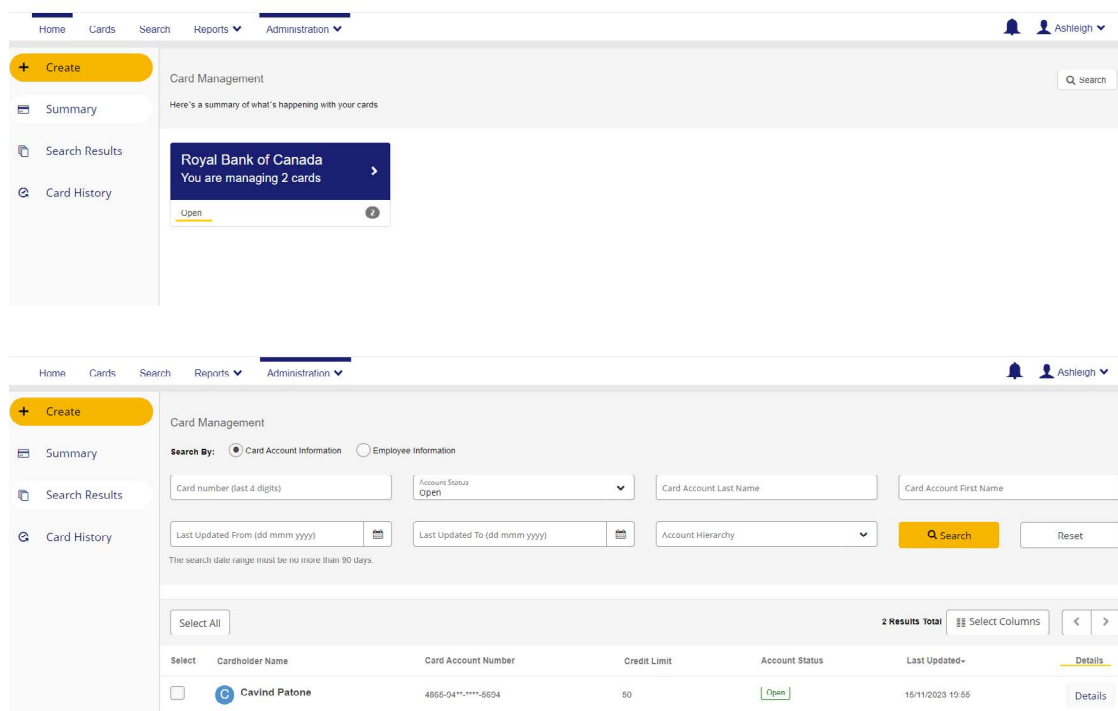
# Temporary credit limit

## Set a temporary credit limit

As part of the update functionality, you can set a credit limit that takes effect on the specified effective date and is restored to the original on the expiry date, if set.

To set a temporary credit limit:

1. On the left-hand side select **Administration > Accounts and Cards > Card Management > Open > Details**.
2. Populate the following fields in the Account Limits category of the screen and click **Submit**:



- Temporary credit limit
- Effective date
- Expiry date (optional) – This date cannot be earlier than the day after the effective date.

### Cardholder Address

<b>Country</b>	Canada	<b>City</b>	Guelph
<b>Address Line 1</b>	37 Doyle Drive	<b>State/Province</b>	ON
<b>Address Line 2</b>		<b>ZIP Code</b>	N1G 5E6

### Account Limits

<b>Credit Limit</b>	10
<b>Current Balance</b>	0.00
<b>Available Credit Limit</b>	10.00

**Temporary Credit Limit**

**Effective Date**

**Expiration Date**

### 3. On the **effective date**:

- The temporary credit limit will be applied as the credit limit on the Card Management screen.
- If an expiry date is specified, a message will be displayed: “The credit limit of (original limit) will be restored on (expiry date)”

#### Cardholder Address

Country	Canada	City	Guelph
Address Line 1	37 Doyle Drive	State/Province	ON
Address Line 2		ZIP Code	N1G 5E6

#### Account Limits

Credit Limit	10
Current Balance	0.00
Available Credit Limit	10.00

Temporary Credit Limit

Effective Date

Expiration Date

4. On the **expiry date** (if specified), the permanent credit limit will be restored automatically.

## Remove a temporary credit limit

If you wish to make changes to a temporary credit limit before it goes into effect, simply access the Edit screen, and update the fields in the Temporary Credit Limit section.

To delete a temporary credit limit before it goes into effect, **simply clear the amount field** in the Temporary Credit Limit section and click **Submit**.

After the temporary credit limit has gone into effect for an account, you cannot edit the temporary credit limit fields. However, you can remove the temporary limit and restore the original credit limit.

To do this, on the **Card Management – Edit** screen, click the **Remove** button in the **Temporary Credit Limit** section and then click **Submit**.

Account Limits

Credit Limit	75
Current Balance	0.00
Available Credit Limit	75.00

Temporary Credit Limit

Temporary Credit Limit	75
Effective Date (dd/mm/yyyy)	20/05/2022
Expiration Date (dd/mm/yyyy)	31/05/2022

The credit limit of 62 will be restored on 31/05/2022

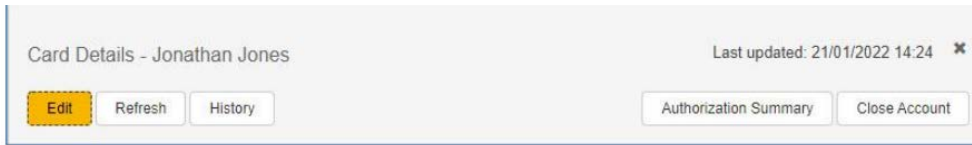
Remove

When you submit the changes, the original credit limit will be restored, and the temporary credit limit fields will revert to blank.



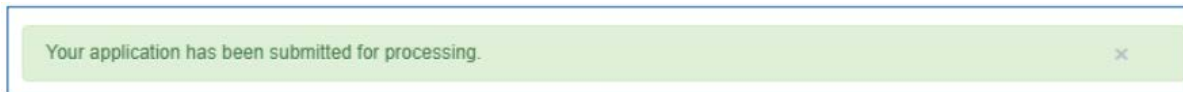
# How to close an account

1. To close a selected account, click the **Close Account** button at the top of the screen in read-only mode.



2. Add a **Comment**, if needed, and click **Submit** to send the closure request.

Your request will be submitted for processing.



3. An automatic email will be sent when the report is ready.

## Multiple card creation (bulk)

Multiple card creation allows Program Administrators to create multiple cards through a single request.

Multiple card creation is helpful when there is a need to create more than 5-10 cards at once. Please remember that it takes about 24 hours for the card creation process to be completed.

### Multiple Card Creation (MCC) Interface file

Multiple cards are created by uploading and processing a valid interface file (of interface type – MCC).

The contents and format of the file are described in detail in the Multiple Card Creation (MCC) Interface Import guide.

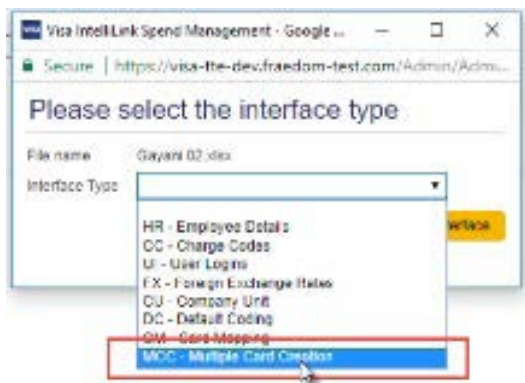
Example of a multiple card creation (MCC) interface file in Excel spreadsheet format.

	A	B	C	D	E	F	G	H	I	J
1	Template Name	First Name	Middle Name	Last Name	Email Address	Date Of Birth	Employee ID	Work Phone	Home Phone	Company ID
2	Standard	Fred	John	Smith	fred.smith@samplecompany.com	1969-01-01	Emp_01	6491526000	6491526001	2191919
3	Standard	Amy		Wood						

### Processing the interface file

To create multiple cards upload the interface file to the Vault (**Administration > File Management > Refresh Interfaces**). The new interface type will be added to the list.

#### MCC – Multiple Card Creation interface type option



When processing is complete, the card accounts are queued up and sent to the processor at the next available processing time.

**Note:** Processing bulk files occurs during non-peak hours, so it may be 24 hours before the file is processed.

## Error messages

### Multiple card management is not enabled for the company


**Message:** “Your company is not set up for multiple card management, therefore you are unable to process this file.” If this message appears, please contact **RBC NextLogic Navigational Support at 1-877-334-9938** or by email: [rbccommercialcards@rbc.com](mailto:rbccommercialcards@rbc.com).

### Interface Processing

---

Your data refresh is being processed, please be patient as this can take a few minutes

[Interface Results](#)

 Your company is not set up for multiple card management, therefore you are unable to process this file.

### Card administrator does not have card creation rights


**Message:** “You do not have access to create card functionality, therefore are unable to process this file.” If this message appears, please contact RBC **NextLogic Navigational Support at 1-877-334-9938** or email: [rbccommercialcards@rbc.com](mailto:rbccommercialcards@rbc.com).

### Interface Processing

---

Your data refresh is being processed, please be patient as this can take a few minutes

[Interface Results](#)

 You do not have access to create card functionality, therefore are unable to process this file.

### Number of cards exceeds allowed limit

The maximum number of card records allowed in a file is 1,000.


**Message:** “Too many records loaded in imported file. (number of files) received, which is more than maximum of 1000 records.”

### Interface Processing

---

Your data refresh is being processed, please be patient as this can take a few minutes

[Interface Results](#)

 Too many records loaded in imported file. 1006 received, which is more than maximum of 1000 records.

## Multiple card maintenance (bulk)

Administrators can now update or close up to 25 cards at a time. Multiple card maintenance is helpful when there is a need to update more than 5-10 cards at once. Please remember that it takes about 24 hours for the multiple maintenance request to be completed.

### Selecting multiple accounts

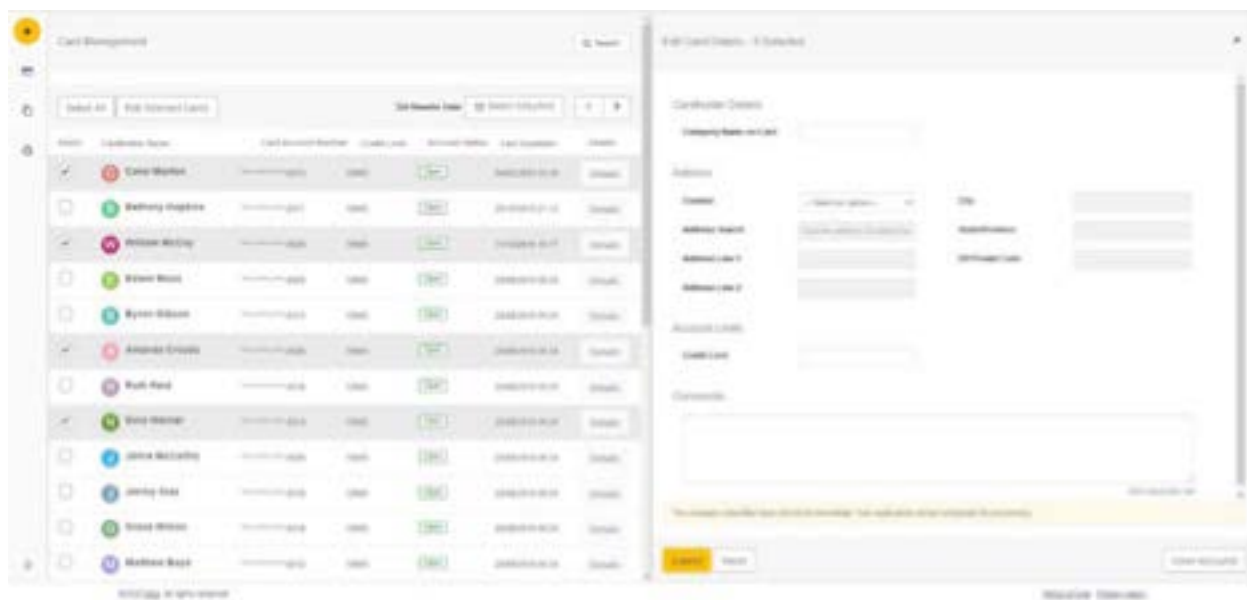
1. Click **Select All** to select all the accounts listed on the current page.

Click the **check box** next to a cardholder's name to select an individual account.

2. When all the check boxes are selected, the **Edit Selected Cards** button appears. Clicking the button opens the **Update Accounts** pane, where changes can be made and submitted.

**Note:** Only accounts selected on the current page view can be multi-card managed because visual confirmation of all the accounts selected is necessary. When you move to a new page or change the sort order of a column, the Update Accounts pane closes.

### Example of the Card Management screen with multiple accounts selected



## Update fields and close multiple cards

### Update Accounts pane

Edit Card Details - 4 Selected

Cardholder Details

Company Name on Card

Address

Country

City

Address Search

State/Province

Address Line 1

Address Line 2

ZIP/Postal Code

Account Limits

Credit Limit

Comments

500 characters left

The changes submitted here will not be immediate. Your application will be scheduled for processing.

1. Populate one or more fields that need to be updated for the selected accounts and click **Submit** to schedule the changes.
2. Click **Close Accounts** to schedule the accounts closure.

# How to view transactions

## Two types of transactions in RBC NextLogic – authorized and posted transactions

### What are authorized transactions?

Any transaction made with your RBC Commercial Credit Card is authorized before being posted. Authorized transactions are transactions that still need to be settled by a retailer or service provider. The transaction amount is held against your available credit while we wait for the merchant to send us confirmation of the transaction.

### What are posted transactions?

Posted transactions are completed transactions that have been settled by a retailer or service provider. These transactions will subsequently appear on your statement with the post date.

## Viewing authorized transactions

This feature is helpful when you need to see authorized transactions before they are posted.

1. Access **Card Management** by clicking **Administration > Overview > Card Management**.



### HELPFUL TIP

Hover over **Card Management** and click the pin icon to create a shortcut to the home page.

2. On the **Card Management Summary** screen, click **Open**.
3. Click the **Details** button beside the card you want to view.
4. Click **Authorization Summary**.
5. To view the details of an authorized transaction or investigate why a transaction was declined, click **Details** beside that transaction. The **Authorization Details** panel will appear.



### HELPFUL TIP

Confirm the reason for the decline and reference the **Common Decline Codes** document in RBC NextLogic in the Commercial Cards Service Centre ([rbc.com/corporatecardservices](http://rbc.com/corporatecardservices)) for details on viewing posted authorizations.

The screenshot displays two side-by-side panels from the RBC NextLogic interface. The left panel, titled 'Authorization Summary', shows a 'New Test' card with a card number 495504\*\*\*\*0422, an expiration date of 05/02/2019, and a 'Submit' button. Below this is a table with 4 results. The right panel, titled 'Authorization Details', lists various transaction parameters such as Authorization Date, Time, Amount, and Reason Code.

Transaction Date	Transaction Time	Disposition of Request	Type of Request	Transaction Amount
04/02/2019	13:50:36490	Approved	0	30.00
04/02/2019	13:59:02010	Approved	0	90.00
04/02/2019	13:58:16490	Approved	0	30.00
04/02/2019	13:56:59410	Declined	0	10.00

Authorization Details:

- Authorization Date: 2019-02-04
- Authorization Time: 13:56:59410
- Merchant Category Code: 5
- Authorization Amount: 10.00
- Decline Reason Code: 0134
- Auth Response Desc Text: 0
- Card Expiration Date: 2022-01-02
- Acquiring Country Code: CANADA
- Merchant Name And Location: - / -
- Currency Code: CAD
- Source Authorization: TSY
- Available Money Before Auth: 12000.00
- Primary Decline Reason Desc: CARD ACTIVATION
- Authorization Code: 000000
- Cash Available At Auth: 10000.00
- Bad Pin Attempts: 0
- Limit: 10000.00
- Balance At Auth: 11560.00

6. Log into **RBC NextLogic**.
7. In the **Transactions** section on the RBC NextLogic home page, click **View full transaction summary**.
8. The **Transaction Search – Company** pop-up window will appear. Select the statement period or date range then **Search**.

**Note:** The default displays a summary of transactions by account. To obtain a detailed list of transactions at the corporate customer account level, click the radio button beside **Transaction list** (see the lower left corner of the pop-up window).

# How to view account balances

## Viewing corporate customer account balance

**Note:** Only users that are mapped or delegated (linked) to the Corporate Customer Account will have access to it.

1. Log into **RBC NextLogic**.
2. On the home page, you will see the **Corporate Accounts** section.
3. Click **Get latest balance** to view the real-time available credit.

**Note:** The available credit is in real-time and includes authorized transactions. The current balance is based on posted transactions and may not include all authorized transactions.

## Viewing individual cardholder account balance

If your user profile is not mapped or delegated (linked) to the cardholder account

1. Log into **RBC NextLogic**.
2. Access **Card Management** by clicking **Administration > Overview > Card Management**  
**Tip:** Hover over **Card Management** and click the icon to create a shortcut to the home page.
3. On the Card Management summary screen, click **Open**.
4. Click the **Details** button in that card's summary row.
5. On the Card Details screen, click **Refresh**.
6. Scroll down to the **Account Limits** section to view the available credit limit and current balance in real-time based on posted transactions.


## Quick access to cardholder accounts that are already mapped or delegated (linked) to your profile

1. Log into **RBC NextLogic**.
2. On the home page, click the **Accounts** tab.
3. Click on the **card of interest**.
4. Click the **Refresh** button to obtain real-time **available credit** (includes pending transactions):
  - A card mapped to your profile will appear under the My Accounts icon in the left menu.
  - A card delegated to your profile will appear under **Delegated Accounts**.

### To delegate other cardholder accounts to your user profile

1. Click **Reports > Company Administration > Account Delegation**.
2. The **Account Delegation** pop-up window will appear. Enter the employee information in the field(s) or click **Search** to obtain a full list of cardholders.



3. Check off the box beside the cardholder account of interest, then click **Delegate Selected Accounts**.
4. The **Employee Search** window will appear. Enter their first and last name and click **Search**.
5. Your search results will display the employee's user profile. Click the  icon beside the user's name to delegate the account.

## How to view statements

Statements can be viewed for both the cardholder and the corporate customer account in RBC NextLogic:

1. From the RBC NextLogic home page, select the **Reports** link at the top of the page.
2. Select **Company Administration > Statement Manager**.

**Tip:** Hover over and click on the pin icon to create a shortcut to the home page.

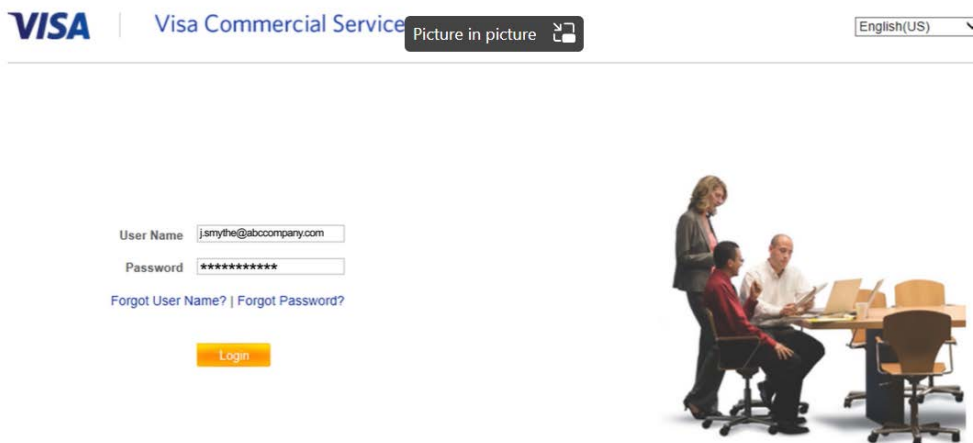
3. Search for a specific statement from the drop-down lists:
  - i) In the pop-up search window, select the desired statement period in the drop-down list and click **Search**.
  - ii) On the results page, click the red square pdf icons to download the official statement.

**Note:** You can access up to 25 months of eStatements and 2 years of transactional data. If you need additional historical information, please contact **RBC Commercial Cards Client Support at [rbccommercialcards@rbc.com](mailto:rbccommercialcards@rbc.com) or 1-877-334-9938**.

## How to generate a report

RBC NextLogic includes a suite of powerful reporting tools that harness business spend data and insights.

1. Log into RBC NextLogic.



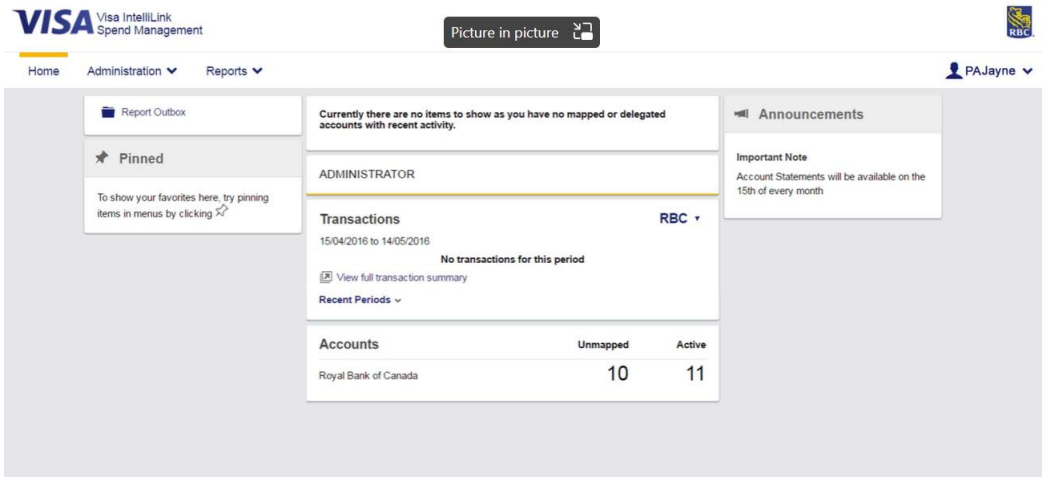
User Name

Password

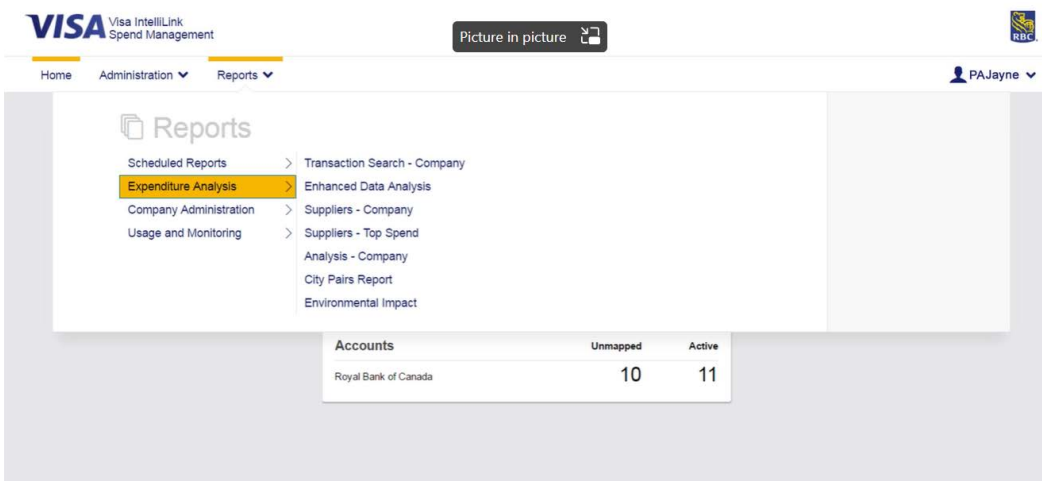
[Forgot User Name?](#) | [Forgot Password?](#)



2. Select **Reports** at the top of the screen.



3. Select which report is applicable from the list.



4. Depending on the report, select, review and define the search criteria.

5. Select **Search**.

**Note:** You can also create a report template.

# Alerts and messages

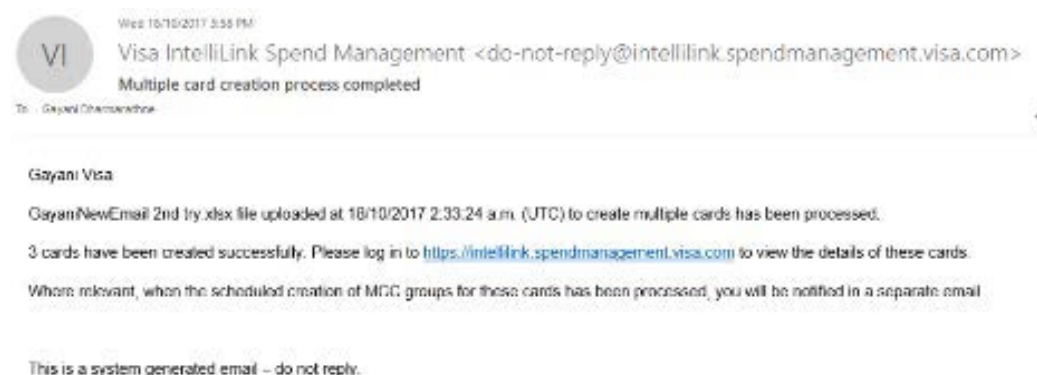
## Card creation email notifications

Once the administrator receives the email, they can locate and view the newly created cards using the normal Card Management search functionality.

In addition to the card creation status, each email includes the following information:

- Company name
- Interface file name
- Datetime stamp when the file was uploaded

## All cards successfully created



## Some records failed

The email provides the total number of cards that were created successfully, and for each failed record, lists the following details:

- Line number
- First name
- Last name
- Status reason
- Error description

## All records failed

The email provides the total number of cards that failed, and for each failed record lists the following details:

- Line number
- First name
- Last name
- Status reason
- Error description


 Wed 18/10/2017 4:26 PM  
 Visa IntelliLink Spend Management <do-not-reply@intelliink.spendmanagement.visa.com>  
 Multiple card creation process completed  
 To: Gayani Dharmaratne

**Gayani Visa**

SomeFailedGayaniNewEmail.xlsx file uploaded at 16/10/2017 3:20:00 a.m. (UTC) to create multiple cards has been processed.

0 of 10 cards have been created successfully. Please log in to <https://intelliink.spendmanagement.visa.com> to view the details of these cards.

Cards could not be created for the following 10 of 10 records:

Line #	First Name	Last Name	Status Reason	Error Description
1	Test11	Test1	WsError	
2	Test2	Test2	ValidationError	The following field(s) have failed validation: EmployedID
3	Test3	Test3	TemplateNotFound	
4	Test11	Test1	WsError	
5	Test11	Test1	WsError	
6	Test11	Test1	WsError	
7	Test11	Test1	WsError	
8	Test11	Test1	WsError	
9	Test11	Test1	WsError	
10	Test11	Test1	WsError	

This is a system generated email – do not reply.

### All records failed due to an invalid template name

The email provides the total number of cards that failed and the template name that was used.


 Tue 17/10/2017 12:14 PM  
 Visa IntelliLink Spend Management <do-not-reply@intelliink.spendmanagement.visa.com>  
 Multiple card creation process completed  
 To: Gayani Dharmaratne

**VISA\_Company**

MCCGTest.xlsx file uploaded at 16/10/2017 10:04:42 p.m. (UTC) to create multiple cards has been processed.

Cards for 3 of 3 records could not be created due to an unrecognised template name: GayaniTSUKGghost

This is a system generated email – do not reply.

## MCC Groups email notifications

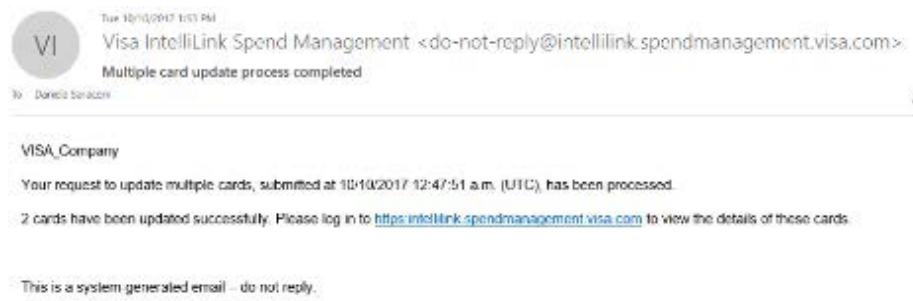
As per the single card creation process, after the scheduled period, usually 24 hours, the default Merchant Category Code (MCC) Group is loaded onto each of the successfully created cards. When processing is complete, an email is sent to the Program Administrator who uploaded the interface file.

The body of the email depends on whether all cards were successfully updated or some or all cards failed to be updated.

Each email includes the following information:

- Company name
- Datetime stamp when the file was uploaded

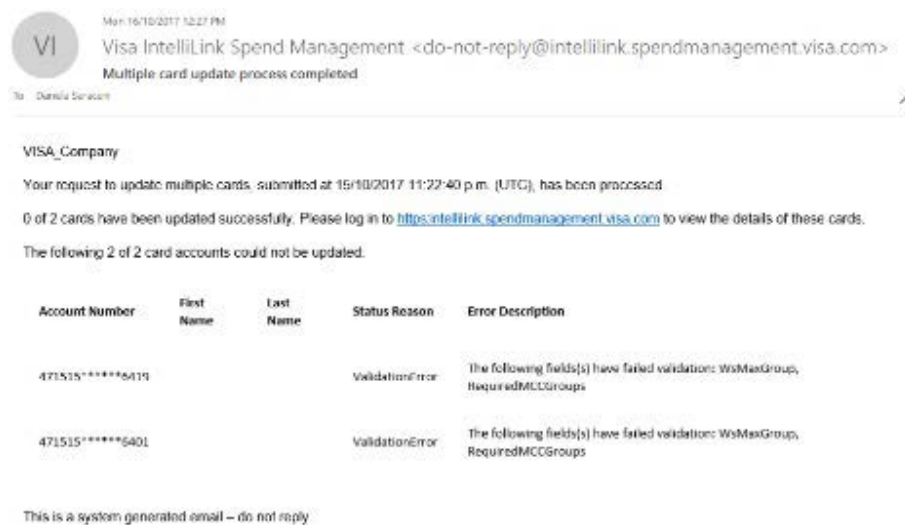
### All cards successfully updated



### Some or none were successful

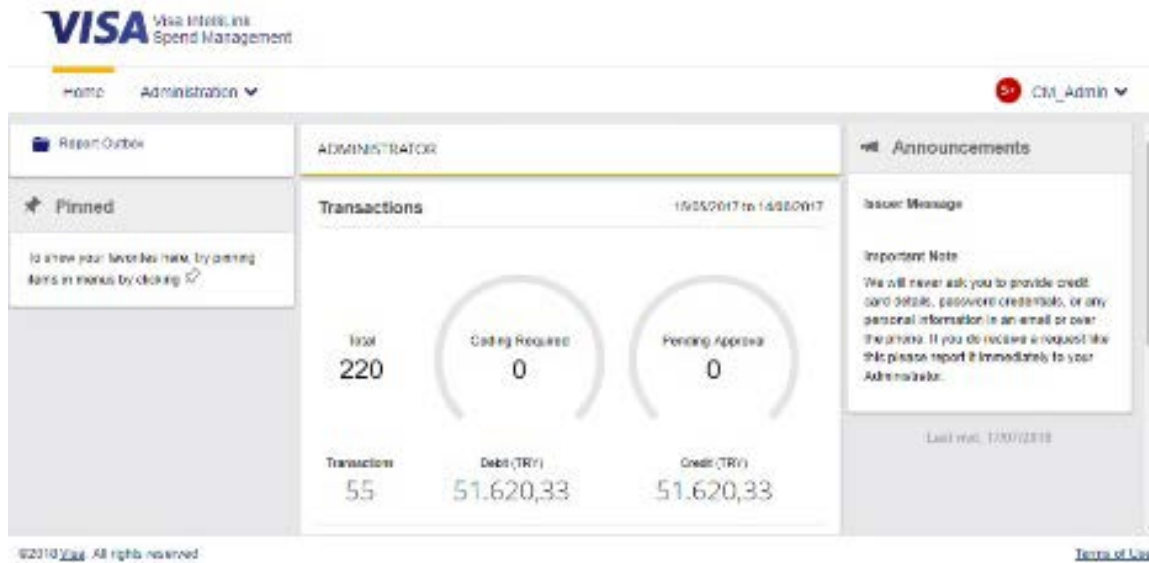
In case some records failed, the email provides the total number of cards that were updated successfully, and for each failed record, lists the following details:

- Account number
- First name
- Last name
- Status reason
- Error description



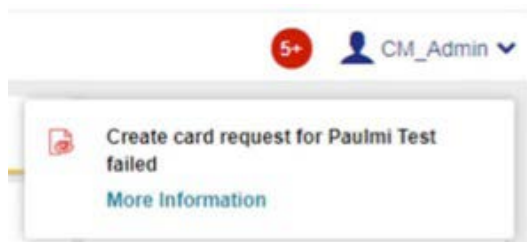
## In-tray notifications

The in-tray will only appear if there is an error notice for the Program Administrator. An icon with the number of messages is displayed to the left of the username icon.



**Note:** The in-tray is enabled by default. However, this option can be disabled per the company's request if needed.

1. Click on **the icon** to display the notifications.



2. Click on **More Information** for a detailed description for that notification.

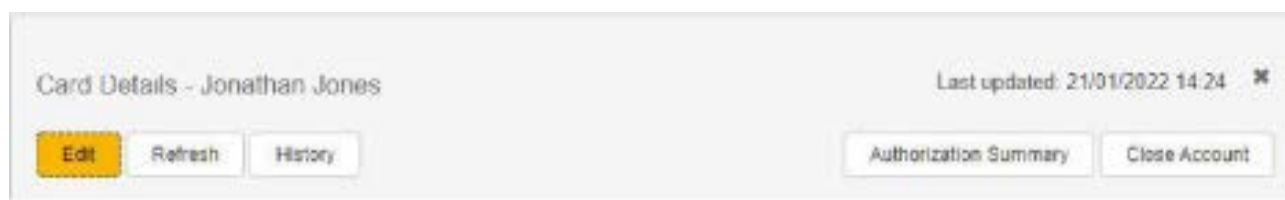


### Example notification causes include:

- Credit limit change fails due to internal errors
- Credit limit change fails at the processor
- Create card failed
- Update card failed
- Update card request timed out
- Close card request failed
- Request plastic failed

## Authorizations and declines

Information on authorized and declined transactions for a card account can be accessed using the **Authorization Summary** button.



The **Authorization Summary** screen will appear, listing all authorized and declined transactions for the selected card over the last 14 days. The information is sorted by the most recent transaction first.

Transaction Date	Transaction Type	Transaction Amount	Type of Request	Description of Request	Merchant Category Code	Merchant Category Description	Approval Code	Decline Reason
2018-01-31	00011200	00	0	Declined	0			1.0002 Invalid expiration date
2018-01-31	00014041	0	0	Approved	0		001500	
2018-02-01	00014030	0	0	Approved	0		040020	
2018-02-01	00013007	0	0	Approved	0		001710	
2018-02-01	00013010	0	0	Declined	0			1.0010 Exceeded account ytd
2018-02-01	00013000	0	0	Declined	0			1.0010 Exceeded account ytd
2018-02-01	00013010	0	0	Declined	0			1.0010 Exceeded account ytd
2018-02-01	00012017	0	0	Approved	0		000400	
2018-02-01	00012007	0	0	Approved	0		001710	
2018-02-01	07001105	0	0	Declined	0			1.0014 CDA status

An **Export All** button allows the Program Administrator to export all the Authorization Summary results of a search as a .csv file. The file includes all columns displayed on the screen.

**Note:** The file name includes the last four digits of the account and the date and time of the export (e.g. *AuthDeclines\_1234\_20180524\_112500.csv*).

Select a transaction to view additional information. This is displayed on the **Authorization Details** screen, which appears on the right of the screen.



The Account category is always expanded. Other categories are:

- Compliance
- Decline
- Parent
- Merchant
- Process
- Referral
- Source
- Diversion

**Scroll down** and **click** anywhere on the bar for the category to view the details. The previously expanded category will collapse.



**Note:** A listing of all transaction decline codes can be found on our [Commercial Cards Service Centre](#) page.



# Templates

There can be a lot of repeatable data that need to be entered during card creation. For example, when new cards are ordered for employees, they may all be delivered to the company office and then handed to employees in person. This information can be saved to a template and reused in the future.

## Save a template

All the templated fields will be saved to the template. Some field values that are unique to a cardholder are not saved in a template. Namely:

- First Name
- Last Name
- Employee ID



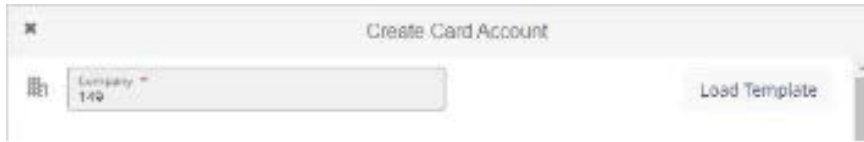
The screenshot shows a web form titled "Create Card Account". At the top, there is a "Company" dropdown menu with "149" selected and a "Load Template" button. Below this is a "Cardholder Details" section with several input fields: "First Name" (Aaron), "Last Name" (Carlson), "Cardholder Name" (Aaron Carlson), "Company Name on Card" (ABC Company), "Email Address" (abc@lorn@company.com), "Unique Employee ID" (2021012008), "Work Phone" (5555551212), "Mobile Phone", "Account Type" (E), and a checkbox for "is this a physical card?" which is checked. At the bottom, there are fields for "City" (Toronto), "State/Province" (ON), and "ZIP/Postal Code" (M5K 1A7).

### Note:

- You are able to save a template with the field validation errors. Only the valid values get saved in the template. When the template is loaded, the valid values get populated on the **Create Card** screen.
- There are no validations for the mandatory fields to save the template.
- Read-only (default) fields are not templated.
- The **Save Template** button is available on the **Create Card Account** and **Edit** screens for an existing card.
- The template name must be unique.
- When entering a template name, any existing template names starting with the same characters are listed below the field.
- Alphabets, numerals, white spaces and special characters are allowed in the template name.
- The template name is not case insensitive.

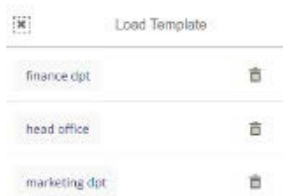
## Load a template

Once a template has been saved, for any new card you are creating, you can click the **Load Template** button to access the list of templates.



To apply a template, select the template you want to use from the list.

The **Load Template** pane will close. The **Create Card Account** screen will be populated with the data saved in the template.



## Delete a template

You can delete a template by clicking the trash can icon beside the template name.

**Note:** Deleted templates cannot be recovered. Any user with access to this functionality can delete the templates created by another user.

## Auditing and card history

There are two views that can be used to obtain the history of changes to a card account:

- Company view
- Card account view

The following actions are captured as part of the card history:

- Create card
- Update card
- Refresh card
- Request plastic
- Close card account
- Scheduled MCC Groups
- Scheduled temporary credit limit
- Authorization (approved/declined) summary
- Authorization detail

Each event is recorded as:

- **Succeeded** – Both the request and the response web service calls have succeeded.
- **Failed** – The request or the response web service call failed.
- **In progress** – The request web service call succeeded, but the response has not yet been received.

### Company level history

1. Click the **Card History** icon in the navigation bar on the left.
2. The **Card History** search screen will appear. Select the search criteria and click **Search**.

**Note:** After the initial search has been performed, the card search panel collapses automatically. The visibility of the search panel can be controlled using the **Expand** and **Collapse** buttons.

Search results are presented in the table below. By default, all columns, except **Hierarchy Node ID** and **Comments**, are displayed. Program Administrators can change the displayed columns by using the **Select Columns** button. The selected options are saved under the Program Administrator profile and will be displayed each time they log in.

3. Click **Details** to the right of the record on the Card History screen to open a side pane displaying the full details of the request. The details pane also displays the field-level history of a request if the **Request Type** is one of the following:
  - Update
  - Multiple update
  - Scheduled temporary credit limit
  - Scheduled MCC Groups

The pane shows the original value and the submitted (new) value for the fields that had requested updates. The information in the pane can be copied to the clipboard for later use (for example, the details can be pasted into an email).

**Note:** *The card history shows the request and does not guarantee that the card account details have changed. It is important to check the **Request Status** to determine if the request succeeded or failed.*

4. The **Export** button allows you to export all returned results in the **Results Total** field as a .csv file. The file is saved to your local **Downloads** folder. It includes all columns in the record, regardless of which ones were selected to display on the screen.

#### File name format for company-level history exports

- CardHistory\_Company\_{yyyyMMdd\_hhmmss}.csv
- Example: CardHistory\_Company\_20180427\_110540.csv

## Card account history

While working with a specific card account, a Program Administrator can view the last 90 days of its history by clicking the **History** button.

**Note:** *To view the card's history beyond 90 days, search for the card number and date range using the **card history** on the company level screen.*

Default columns displayed:

- Request Date
- Request Type
- Request Status
- Actioned By
- Reference ID
- Last Error Description

The displayed columns can be changed using the **Select Columns** button. The selected options are saved under the Program Administrator profile and will be displayed each time they log in.

Clicking on a record on the **Card History** screen opens a side pane displaying the full details of the request. The details pane also displays the field-level history of a request if the **Request Type** is one of the following:

- Update
- Multiple update
- Scheduled temporary credit limit
- Scheduled MCC Groups

The pane shows the original value and the submitted (new) value for the fields that had requested updates. The information in the pane can be copied to the clipboard for later use (for example, the details can be pasted into an email).

**Note:** The card history shows the request and does not guarantee that the card account details have changed. It is important to check the **Request Status** to determine if the request succeeded or failed.

The **Export** button allows you to export all returned results in the **Results Total** field as a .csv file. The file is saved to your local **Downloads** folder. It includes all columns in the record, regardless of which ones were selected to display on the screen.

#### File name format for card-level history exports

- CardHistory\_{AccountLastFourDigits}\_{File yyyyMMdd\_hhmmss}.csv
- Example: CardHistory\_1234\_20180427\_095332.csv

## How to make a payment

Please access the payment instruction portal through [Paying Your RBC Commercial Credit Card](#). We provide multiple options to make payments to your RBC Commercial Credit Card.

# RBC Commercial Cards Key Contacts

Please carefully read the list of our *service support* options below



Type of Inquiries	Contact Details	Hours of Operation
<b>Program Administrator Support</b> <i>(Administrators only)</i>	Phone number: <b>1-877-334-9938</b> Website: <a href="#">Commercial Cards Service Centre - RBC Royal Bank</a>  <b>Day to Day Servicing:</b> Select Option 1 Email: <a href="mailto:rbccommercialcards@rbc.com">rbccommercialcards@rbc.com</a>  <b>NextLogic Navigational Support:</b> Select Option 2 Email: <a href="mailto:rbccommercialcards@rbc.com">rbccommercialcards@rbc.com</a>  <b>Virtual Card Navigational Support:</b> Select Option 3 Email: <a href="mailto:rbcvpa@rbc.com">rbcvpa@rbc.com</a>	Mon-Fri 8:30 a.m. to 7:30 p.m. EST
<b>Cardholder Support</b> <i>(Account &amp; Payable inquiries)</i>	Phone number: <b>1-888-ROYAL-34 (1-888-769-2534)</b> Website: <a href="#">Commercial Cards Service Centre - RBC Royal Bank</a>	24-hr support, 7 days a week
<b>Card Activation and Replacement</b>	Phone number: <b>1-888-ROYAL-75 (1-888-769-2575)</b>	24-hr support, 7 days a week
<b>Report lost / Stolen Cards</b>	Phone number: <b>1-888-ROYAL-34 (1-888-769-2534)</b> : Select Option 3	24-hr support, 7 days a week
<b>Avion Rewards Travel</b> <i>(Company Points Owners/Designates for RBC Rewards)</i>	Phone number: <b>1-888-773-7057</b> Website: <a href="http://avionrewards.com">avionrewards.com</a>	Mon-Fri 7 a.m. to Midnight Weekends 7 a.m. to 9 p.m.
<b>Insurance Inquiries</b>	Phone number: <b>1-888-ROYAL-34 (1-888-769-2534)</b> : Select Option 6 Website: <a href="#">Credit Card Documentation - RBC Royal Bank</a>	Mon-Fri 8 a.m. to 10 p.m. EST Weekends & Stat Holidays 9 a.m. to 5 p.m.
<b>International Calling</b> <i>(Outside of Canada and U.S.)</i>	Phone number: <b>1-705-522-7437</b>	24-hr support, 7 days a week
<b>Travel Emergency Insurance Coverage Support</b>	Phone number: <b>1-800-533-2778</b>	24-hr support, 7 days a week

