SEPTEMBER 2014
Version 2

PNC Business*Options*® Card

ADVANCED Reporting Tool
CARDHOLDER USER GUIDE

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INTRODUCTION

Welcome to the Advanced Reporting Tool (ART) for your PNC Business*Options*® card!

This service is an online transaction management system presented by 360 Control that enables our cardholders to log on, view and process credit card transactions.

The Advanced Reporting Tool offers useful online features for Business*Options* cardholders, such as:

- **24/7 access** to your Business*Options* card program. View transaction detail, credit limit, available credit and current balance.
- **E-Statements** – View up to 13 months of electronic statements in PDF format.
- **Cost Allocation** – Allocate expenses internally to support client or project-level billing

In addition, your company Program Administrator can:

- **Enter real-time updates** to your card's spend limits and merchant restrictions
- **Update account status**
- Access information on transaction spends and **create reports for you**.

For assistance with your account — please call us at 877-459-9801.

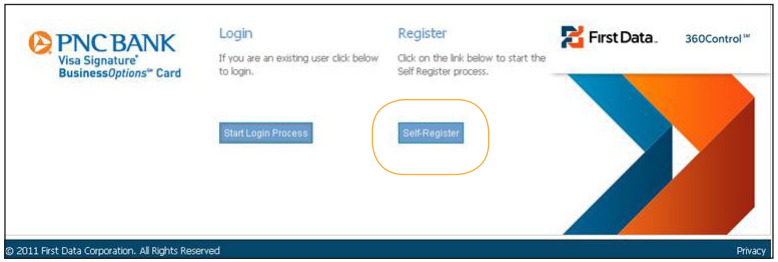
Representatives are available 7am-10pm ET Monday – Friday and 8am-5pm ET Saturday.

SELF-REGISTRATION (FIRST TIME ONLY)

Before you can login to the ART site, you must first self-register as a user. To register for access to the Advanced Reporting Tool, follow these steps:

1. Open Internet Explorer and type in the URL provided to you in the Welcome E-Mail.

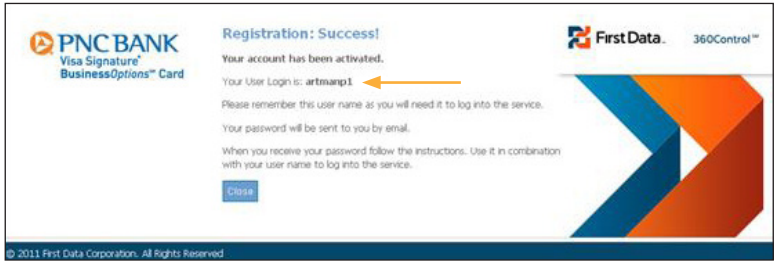
2. Click the **Self-Register** button displayed on the screen.



3. Enter your full 16 digit card number in the field displayed. Click the **Next** button.

4. Enter the required details on the next screen. Click the **Next** button.

5. Provided that the details that you have entered are correct, you will a confirmation message on the next screen. Your User Name will be displayed on the screen. Please take note of it, as you'll need it to log in to **ART**.



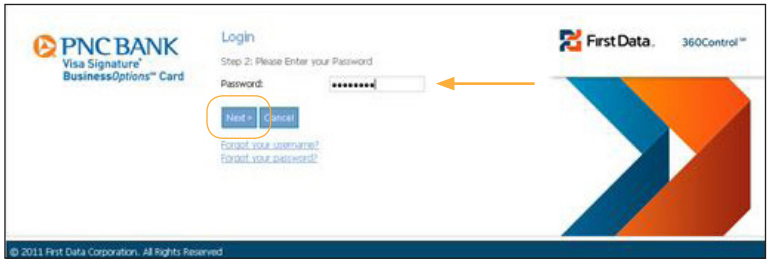
6. A first-time-only password will be automatically E-mailed to you. You will be required to change this password the first time you log in.

LOGIN

After you have registered and received your password email, return to the ART site login screen and choose Start Login Process.

1. Enter your User Name. Click the **Next** button.

2. Enter your emailed password. Click the **Next** button.



3. You'll be required to create a new password.

Passwords are:

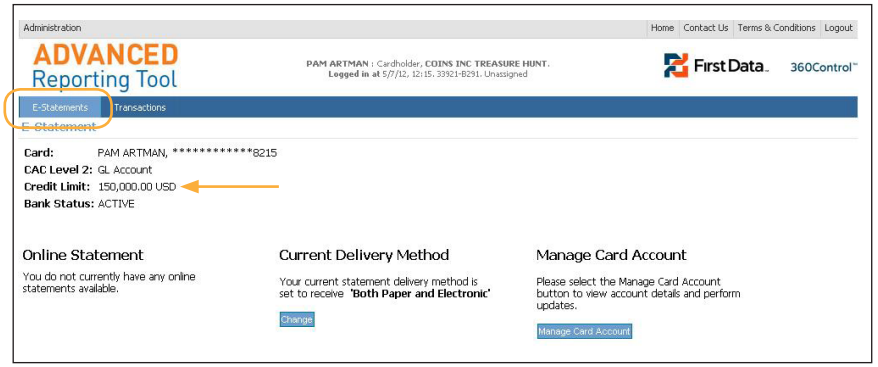
- Case-sensitive
- Must be at least 8 digits long
- Must contain 1 uppercase letter + 1 number
- Blanks are not allowed

After your new password is confirmed, you'll have to accept the terms and conditions before you can gain access to the site.

ART HOME PAGE

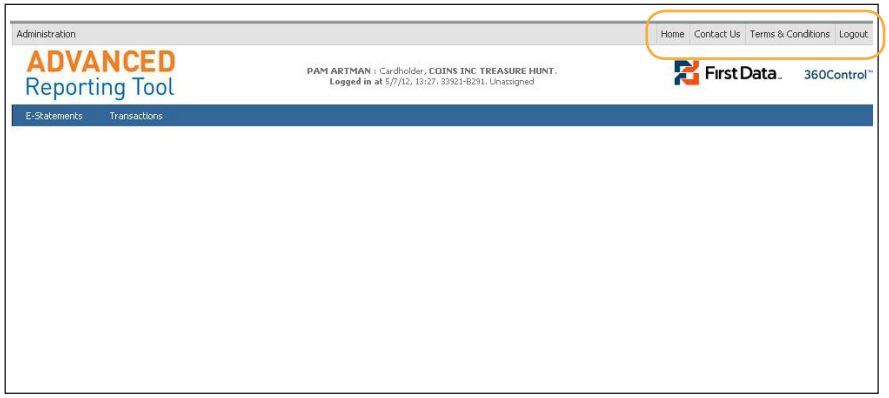
This page is the home page for Advanced Reporting Tool.

The first time, the home page defaults to the E-Statements view *(see blue bar near top of page)*. For subsequent views, it defaults to the last screen you accessed in a previous session.



Note your **company credit limit** on the left side of the screen.

There are links in the Grey Bar at the top right of the screen:



Home – brings you back to this screen.

Contact Us – shows the hours for Online Banking and Customer Service.

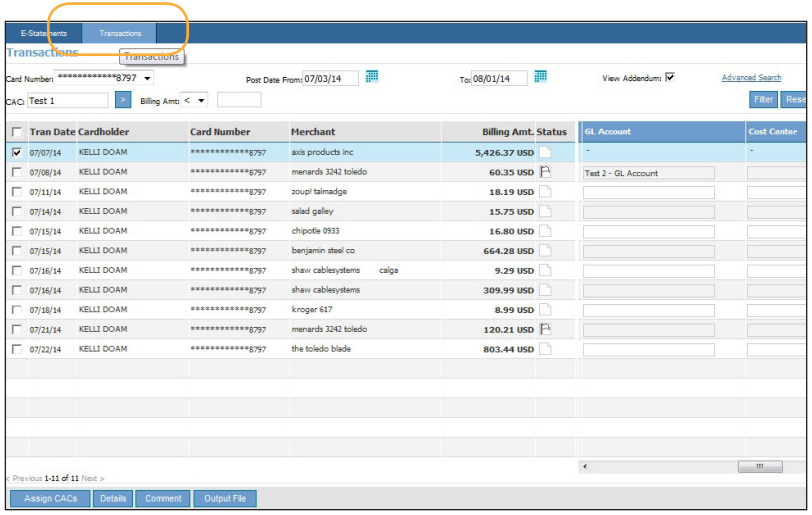
Terms & Conditions – launches the site agreement.

Logout – the safest and most secure way to exit the site.

VIEWING TRANSACTION DETAILS

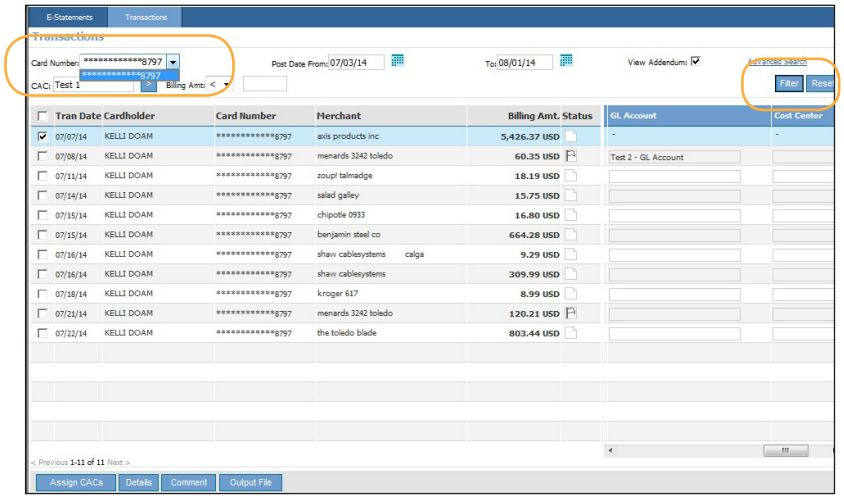
Use the **Transactions** link in the blue tool bar to view all cardholder activity for all users, on one screen.

1. Select **Transactions** in the upper left hand corner within the blue bar



2. Select the arrow next to the **Card Number** box to select a card number from the dropdown menu.

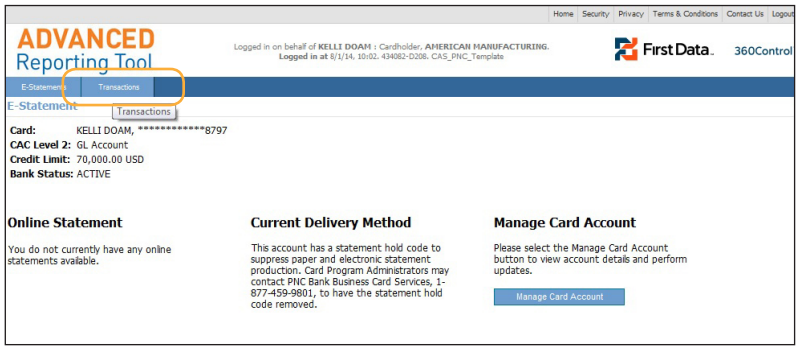
3. Select **Filter** to pull the transactions associated with the selected card number.



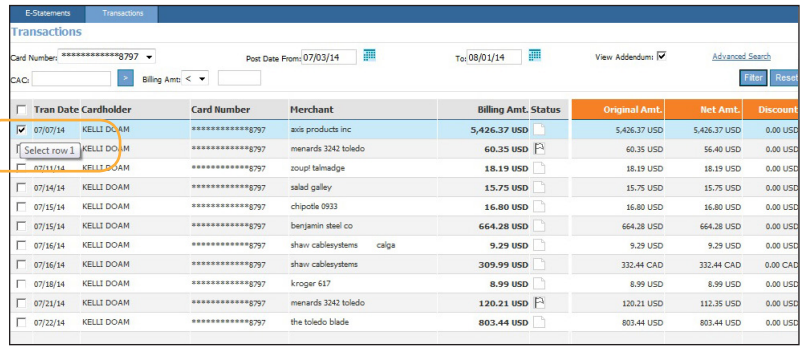
EXPENSE ALLOCATION

The Advanced Reporting Tool enables you to assign your company's internal accounting codes to each purchase, using up to 3 levels of your unique Cost Accounting Codes (CACs). You will save time reconciling data when you download transactions into accounting software, because the card expenses will be pre-coded.

1. Select **Transactions** in the upper left hand corner within the blue bar.

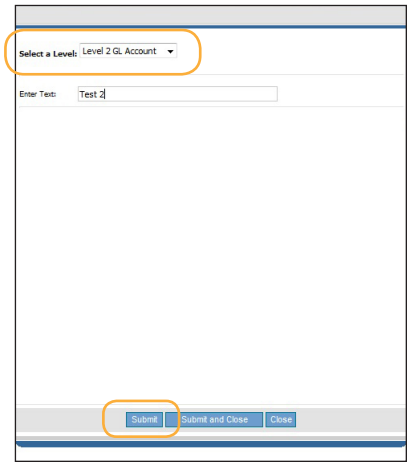


2. Select a transaction by checking the empty box on the left hand side of the transaction bar.



3. Click the dropdown bar next to **Select a Level** to select which level of transaction and create a name for that transaction in the box below.

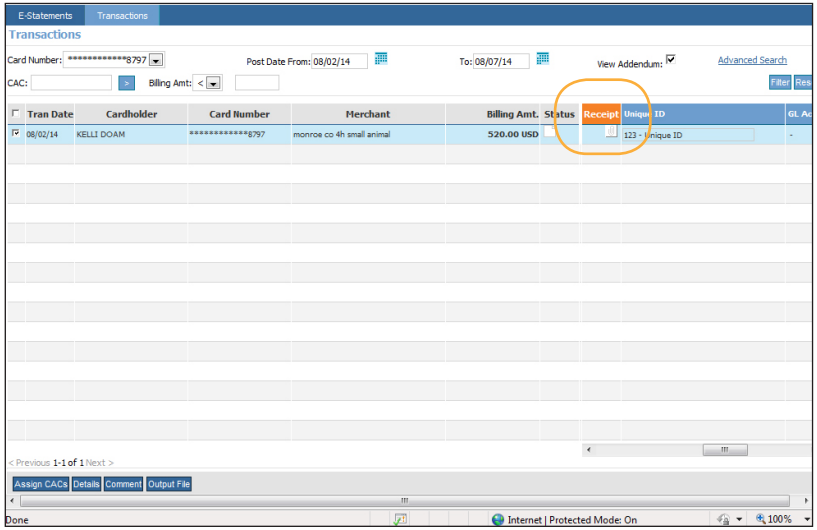
4. Click **submit**.



ATTACH RECEIPT

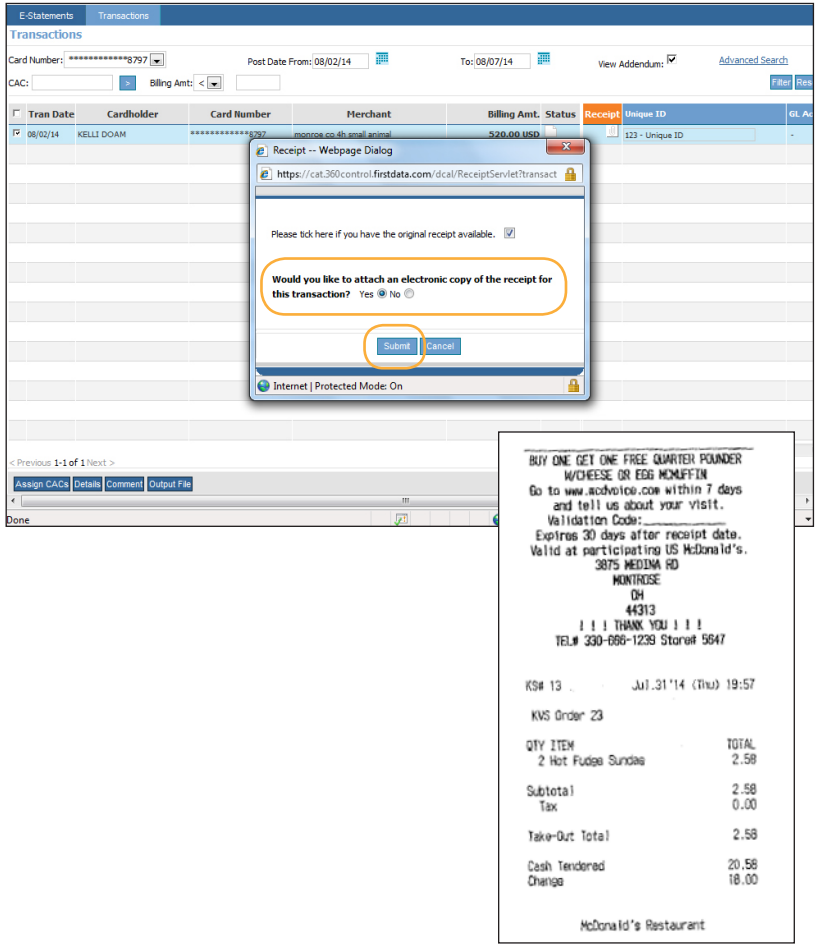
1. In the transaction box on the bottom left hand side, drag the scroll bar to the right until you see the column labeled **receipt**.

2. **Click the paperclip icon** underneath the receipt column.



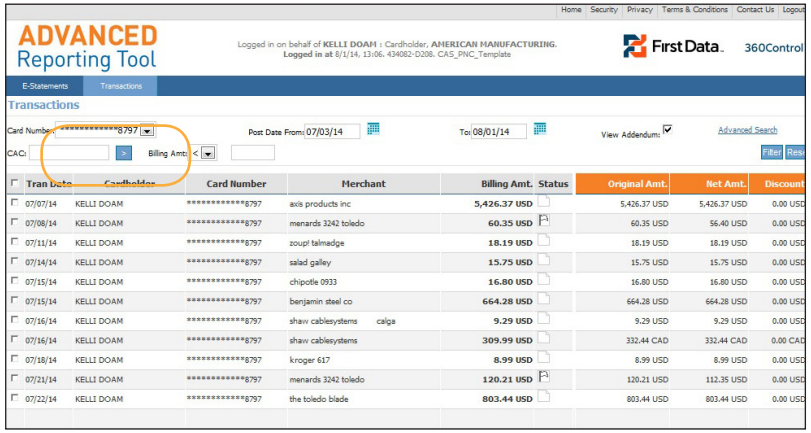
3. Check the box if you have receipt available and then click **Yes** to attach an electronic copy of the receipt to the transaction.

4. Click **Submit**

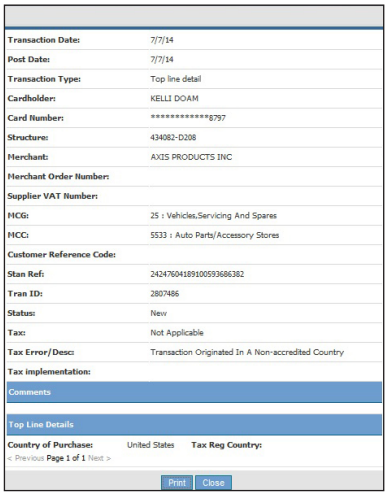


VIEWING RECEIPT

1. In the blue bar at the top of the page, select **Transactions**.



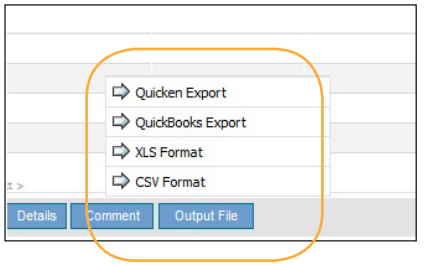
2. Underneath the list of transactions, select the blue button that says **Details**. This will allow you to view the transaction recept.



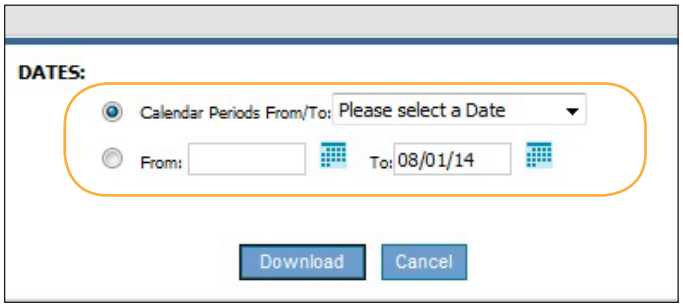
EXPORTING TO QUICKEN

The Advanced Reporting Tool allows you to export financial data to Quicken or QuickBooks.

1. In the bottom left hand corner, run the mouse pointer over the blue **Output File** button to initiate a popup menu. From the pop-up menu, select the **Quicken Export** link.



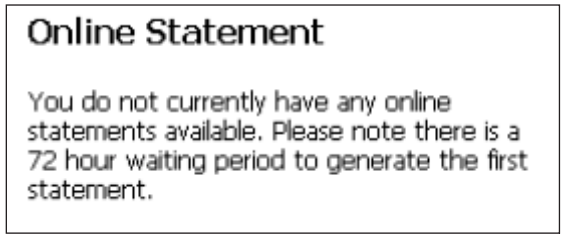
2. In the Quicken Export pop up page, enter the data range to begin the download process to your financial software.



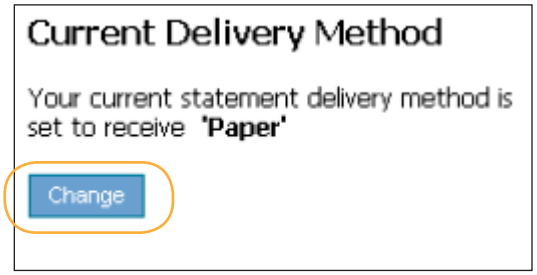
STATEMENT DELIVERY OPTIONS – ON HOME PAGE

In the body of the home page there is information on how your monthly statements are being delivered.

The **Online Statement section** on the left lets you know if a new statement is available online.



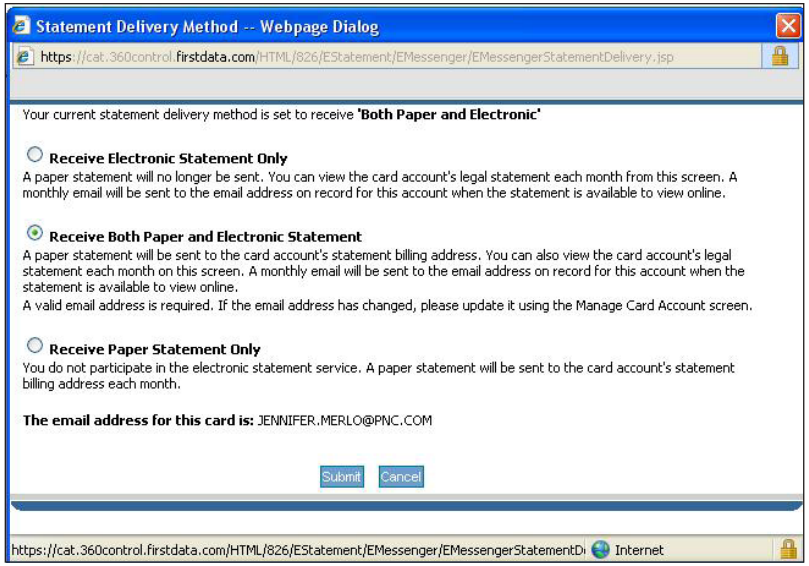
Under the **Current Delivery Method**, there is a button to change your statement delivery from paper to electronic, so that you can view your statement online. *(Statements are accessed via the E-Statements tab in the transactions section.)*



Click **Change** to activate this feature.

You'll see a dialog box with three preferences for Statement delivery. You can choose your preference by clicking on the radio button in front of the method you prefer.

You can change this at any time, but it will take up to 72 hours to be effective.



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Periodic revisions to this manual are issued to reflect technical changes and enhancements to the System, and to ensure that all information contained herein remains current and accurate.