PARTNER COLLABORATION TOOL (PCT) – QUICK GUIDE

After registering for the first time,
always use this link to log in:

PCT.CORNER.CH

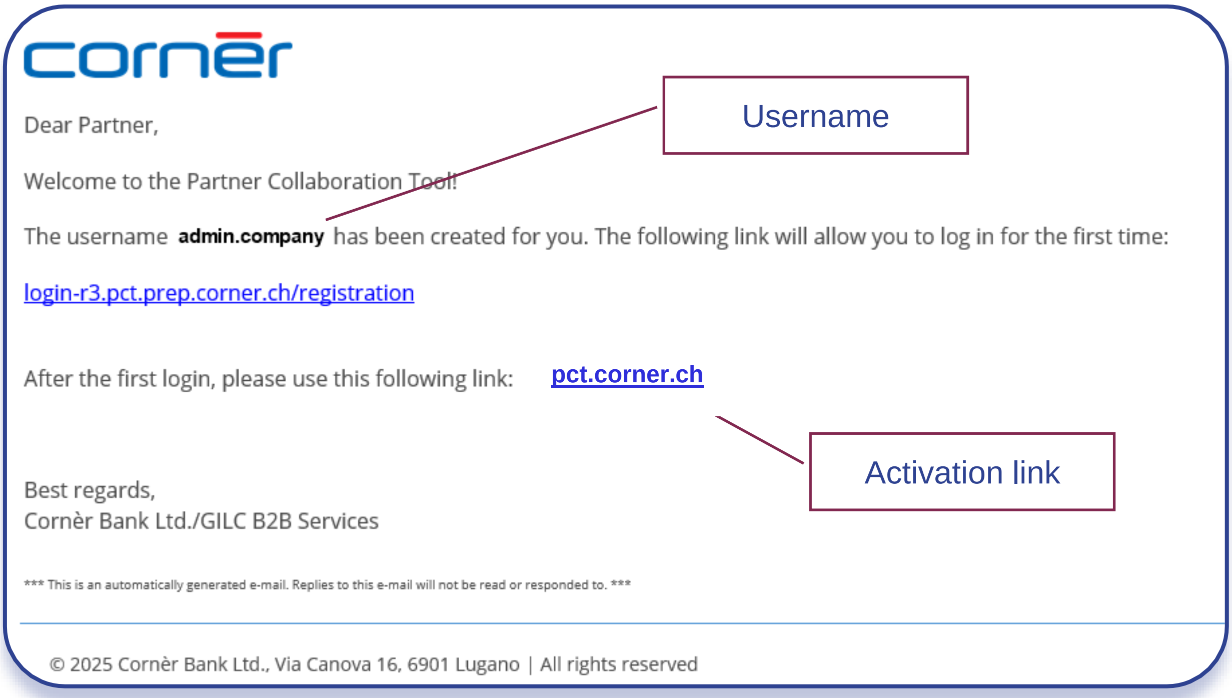
CONTENTS

FIRST LOG-IN

The user will receive an e-mail for the first time that they log in (see example below) containing:

- an **activation link**
- the **username**

This link is valid for 30 days and will no longer be valid after the third click. When the invitation link expires, contact your administrator to get a new activation link sent to you.



Dear Partner,

Welcome to the Partner Collaboration Tool!

The username **admin.company** has been created for you. The following link will allow you to log in for the first time:

login-r3.pct.prep.corner.ch/registration

After the first login, please use this following link: **pct.corner.ch**

Best regards,
Cornèr Bank Ltd./GILC B2B Services

*** This is an automatically generated e-mail. Replies to this e-mail will not be read or responded to. ***

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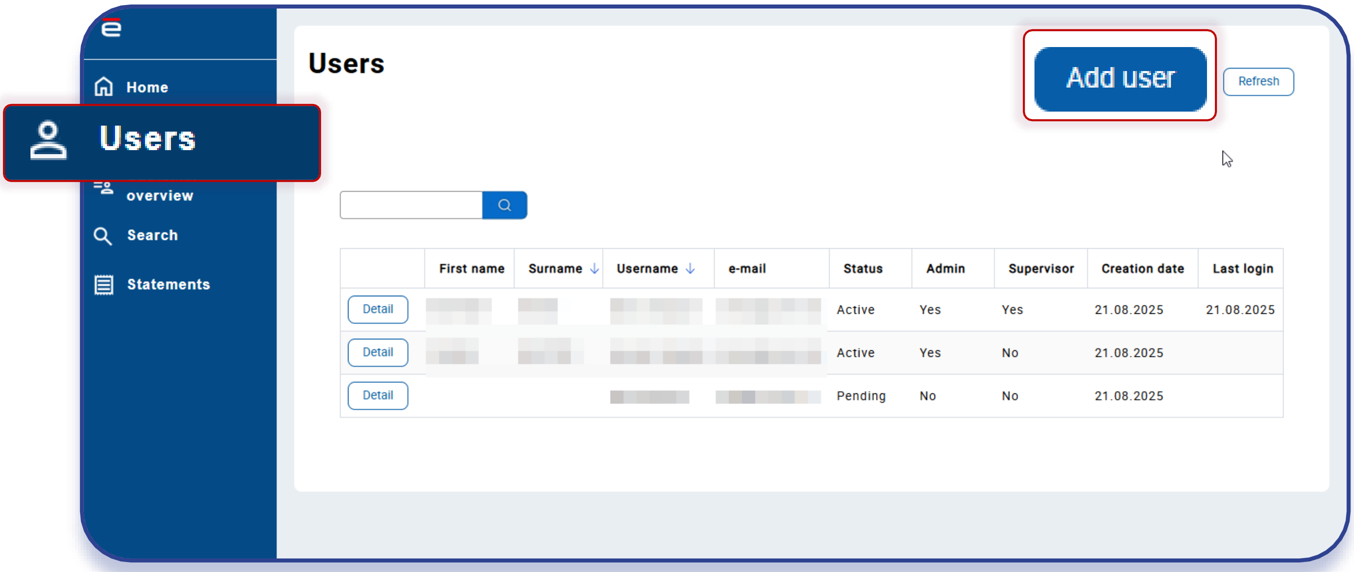
Once you have clicked on the activation link, you will be prompted to enter the code sent via SMS.

If you have not received the code on your mobile phone, check with the administrator to find out which phone number was provided when you registered.

USER MANAGEMENT (ONLY FOR THE ADMINISTRATOR)

ADD USERS

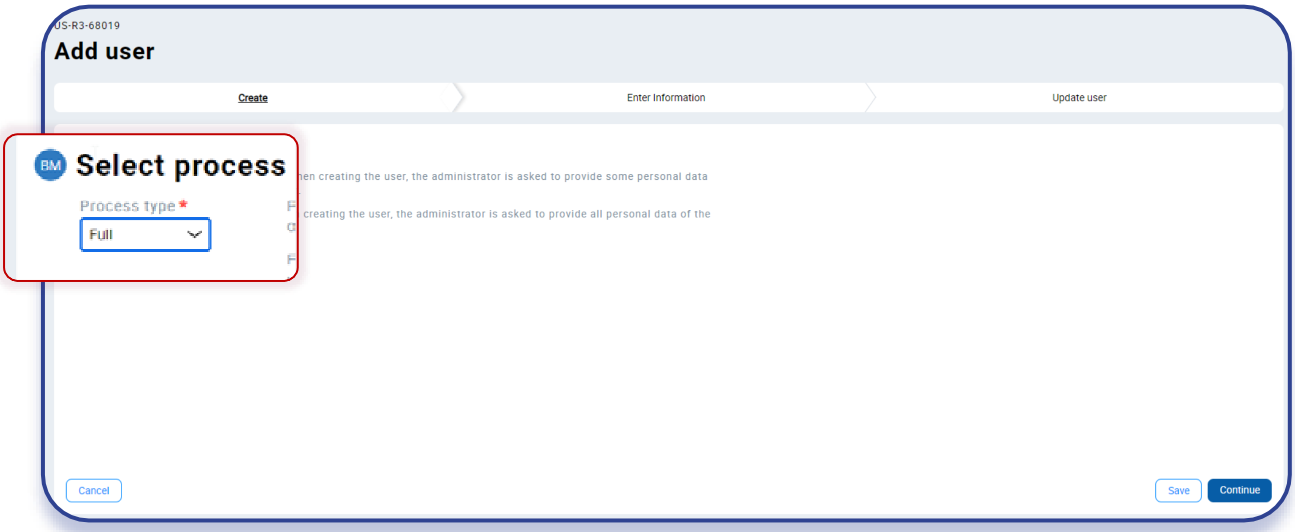
Cornèrcard creates the first admin user upon request, using a specific form.
The portal administrator is able to see the «Users» section in the menu on the left, where they can add new users and update existing portal users.
Select «Users» from the menu and then press the «Add user» button.



There are two ways to create users:

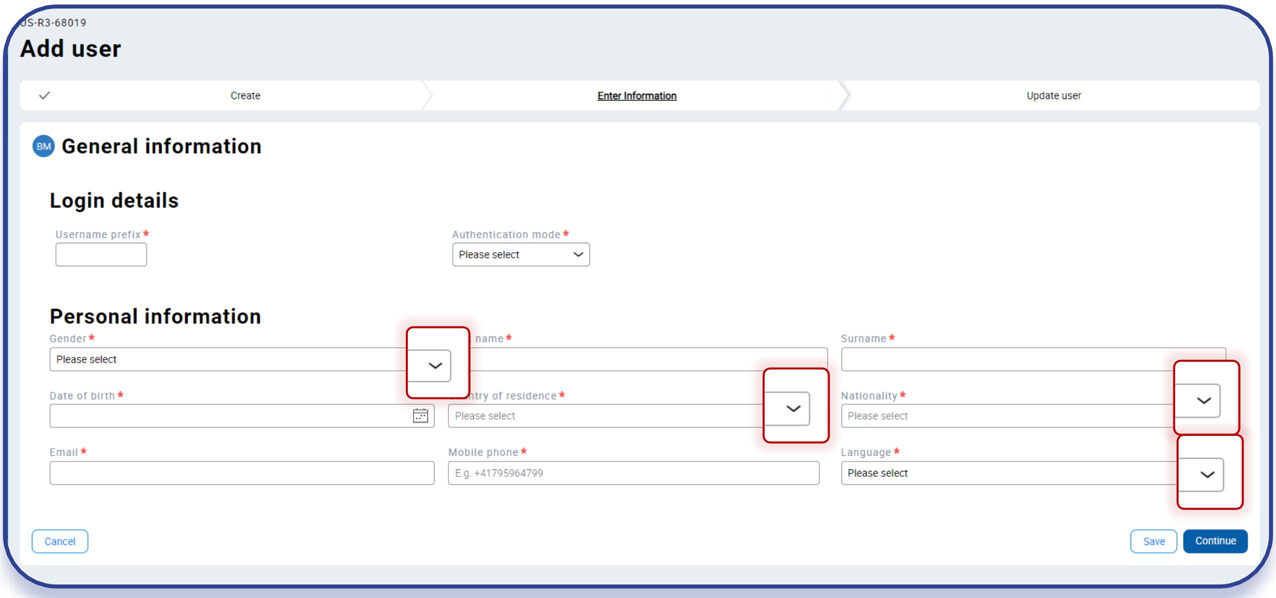
- **Full:** the administrator will be asked to enter all personal user information. Use this method to create a senior admin or supervisor user.

- **Partial:** the administrator provides the basic user information (username, e-mail, mobile phone number and language). When logging in for the first time, the user will be asked to add their additional personal data. It is not possible to create an admin user or supervisor user using this method.



AUTHENTICATION METHODS

Select the authentication method from the drop-down menu. The only option currently available is two-factor authentication via SMS.

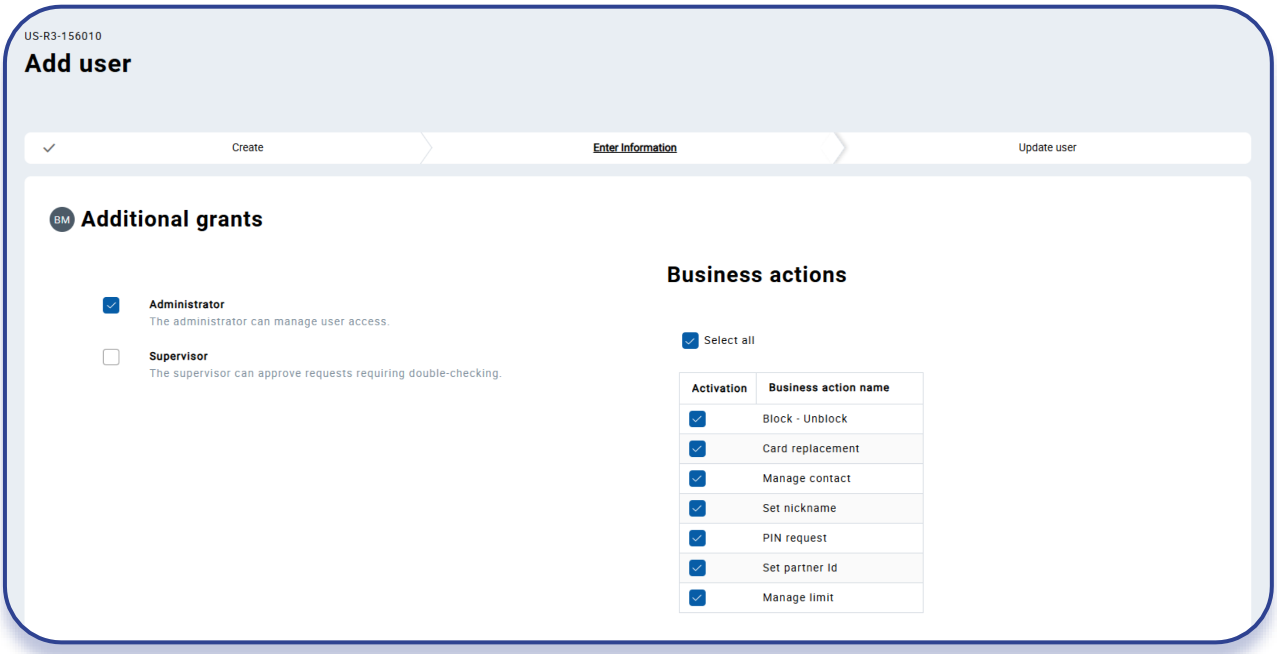


Complete all of the information. If there is one, use the drop-down menu by clicking on the drop-down selector, or by pressing the down arrow on the keyboard once you have clicked on the field with the mouse.

RIGHTS AND PERMISSIONS

In this section, you can select the commercial actions available to the user.

For pre-defined settings, all users can see all the cards and transactions. **If you wish to allow the user to block/unblock cards, make PIN requests, replace cards, add nicknames to cards and IDs to card holders, select the corresponding «Business actions».**

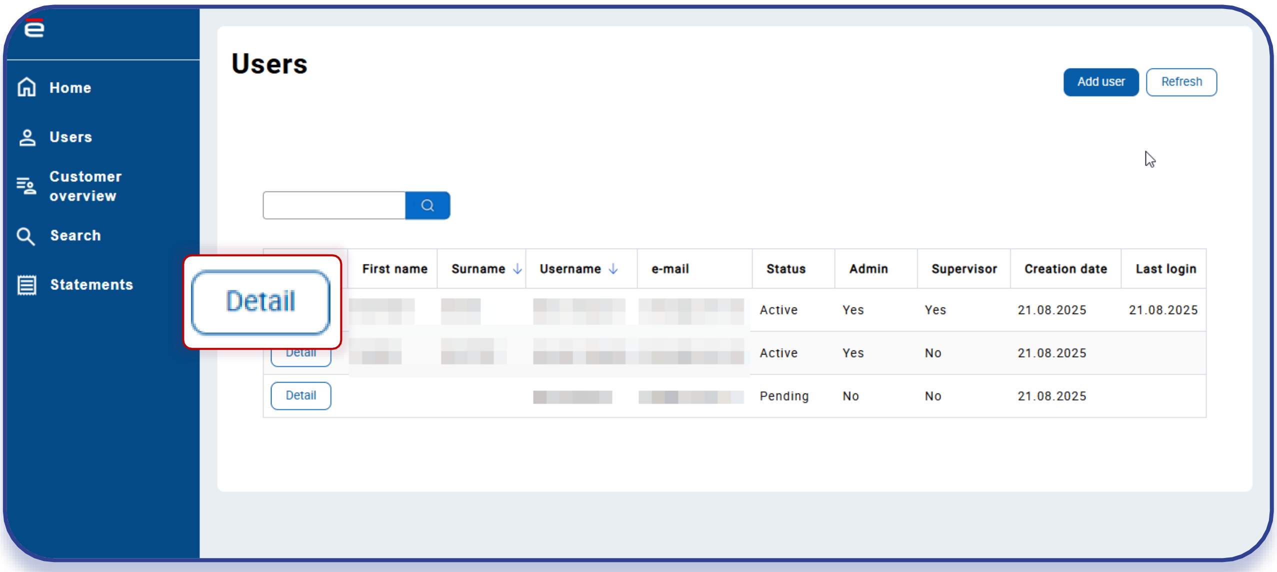


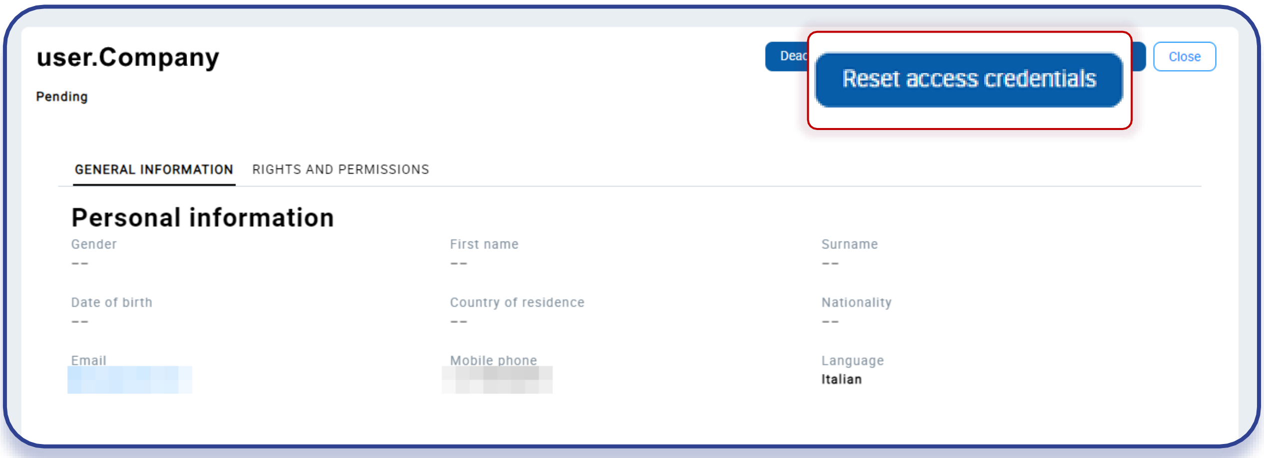
Click on «Complete» to create the user. The user will receive a notification via e-mail with their own name and activation link.
This link will be valid for 30 days. Once the invitation link has been selected three times, it will be deactivated.

RE-SEND THE INVITATION LINK

When the invitation link expires, contact your administrator to get a new invitation link sent to you. You can only resend the link if the user has not logged in before.

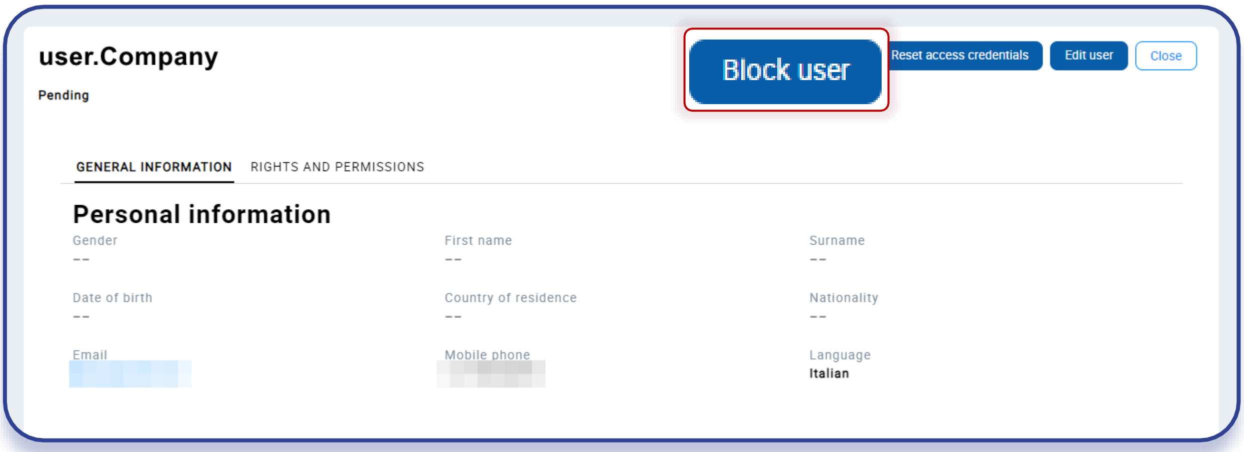
Administrators can change user data and resend expired invitation links by clicking on the «Detail» button in the «Users» section and selecting «Reset access credentials».





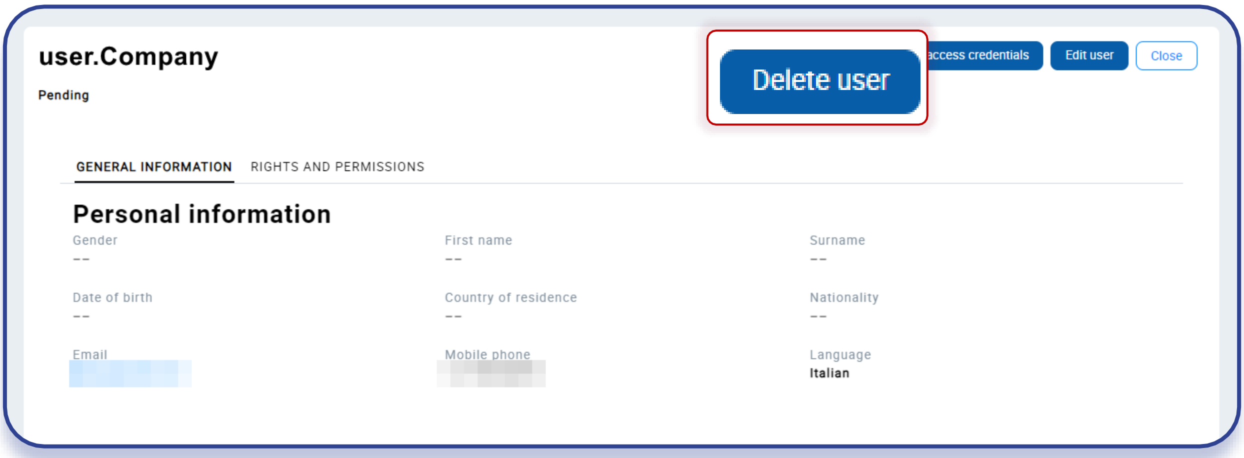
BLOCK USERS

Select «Users» from the menu and then click on the «Details» button next to the user you want to deactivate.
Select the «Block user» button and press confirm.



DELETE USER

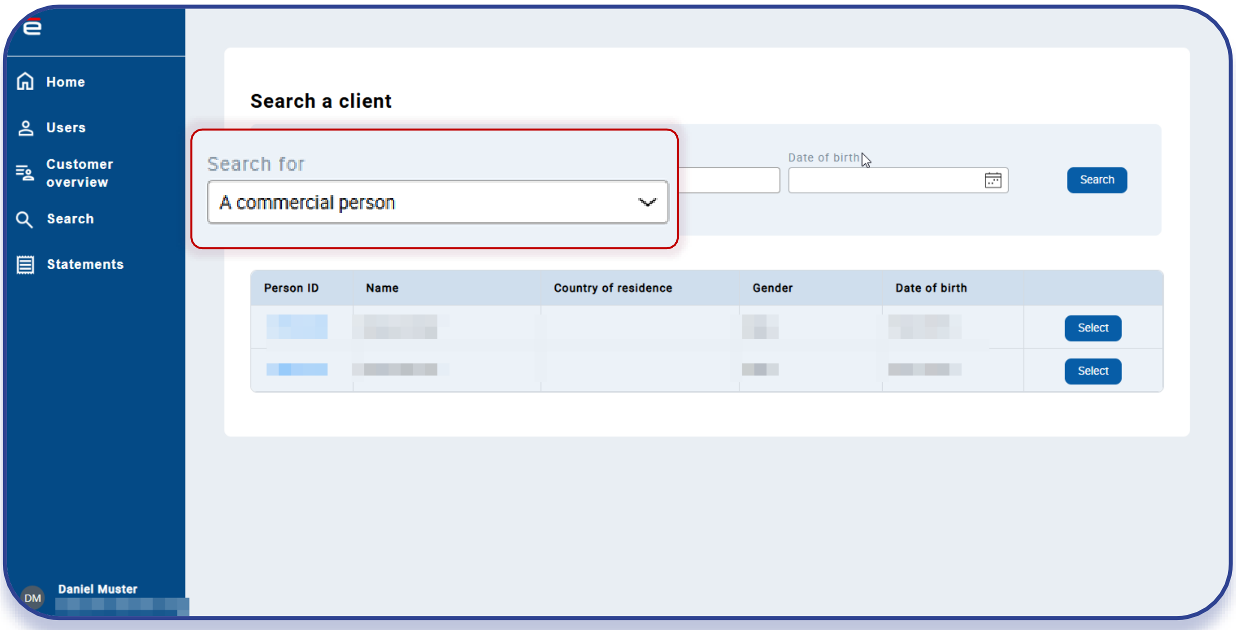
Select «Users» from the menu and then click on the «Details» button next to the user you want to delete. Select the «Delete user» button and press confirm. The deleted user will no longer appear in the list.



VIEW CUSTOMER

All company cards can be seen in the «View Customer» section in the menu.

If the View customer profile is not visible in the left-hand menu, the search function must be used. From the search section, select the second option from the dropdown menu, then enter the company name (minimum three characters). Click the search button, then select the desired company using the blue button from the results.



Search for cards using the search parameters. You can view all cards or search for specific ones by inserting the last name of the card holder, card number or invoicing unit.

In the page header, you can locate company details and general contact details (telephone number and e-mail address) by selecting the following icon next to the company name:

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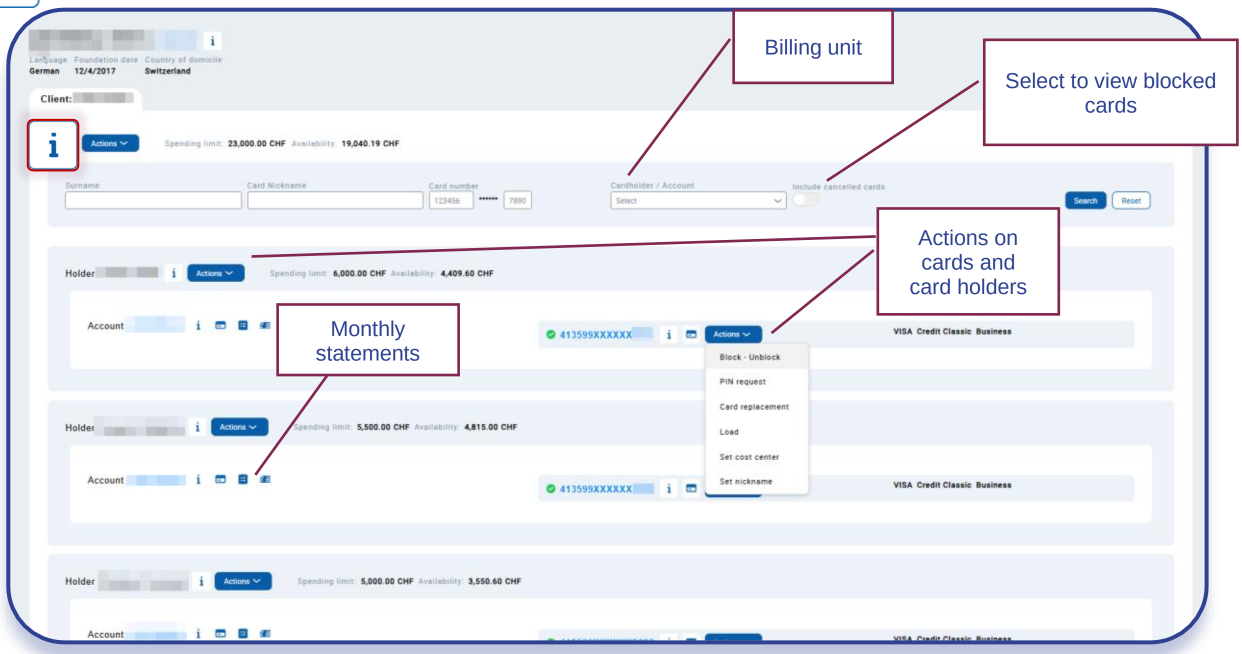
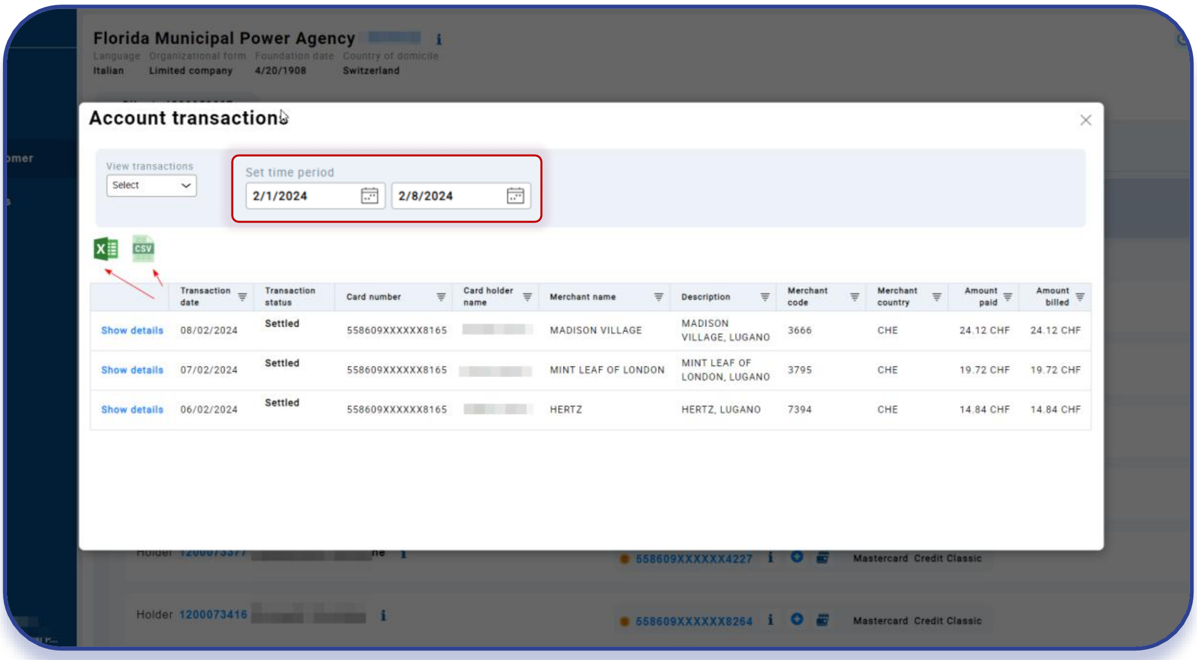


TRANSACTION LISTS

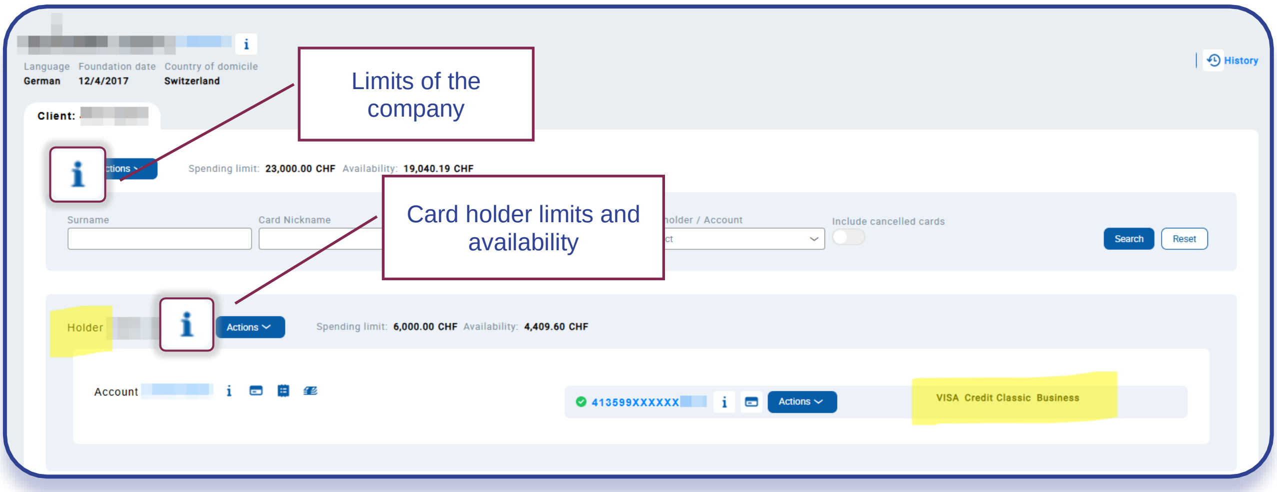
You can find transactions for an individual card or a billing unit by clicking on the symbol .

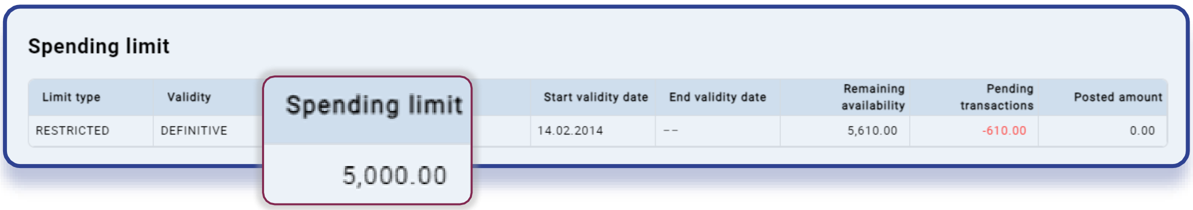
You can filter transactions for a desired time period and download the results in Excel XLSX or CSV format.



CHECKING LIMITS AND AVAILABILITY

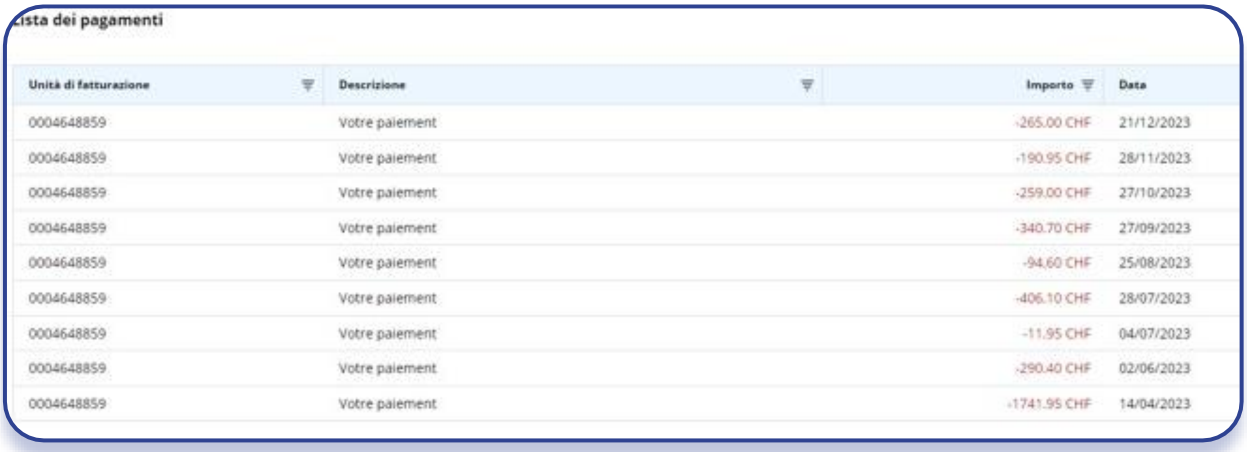
To view the availability at credit cardholder level or the availability of a prepaid card billing unit, click on the following icon in the « Search Person » or «View Customer» section





PAYMENTS LIST

In the «View Customer» section, you can see all the payments entered in the reference billing unit by clicking on the following symbol:



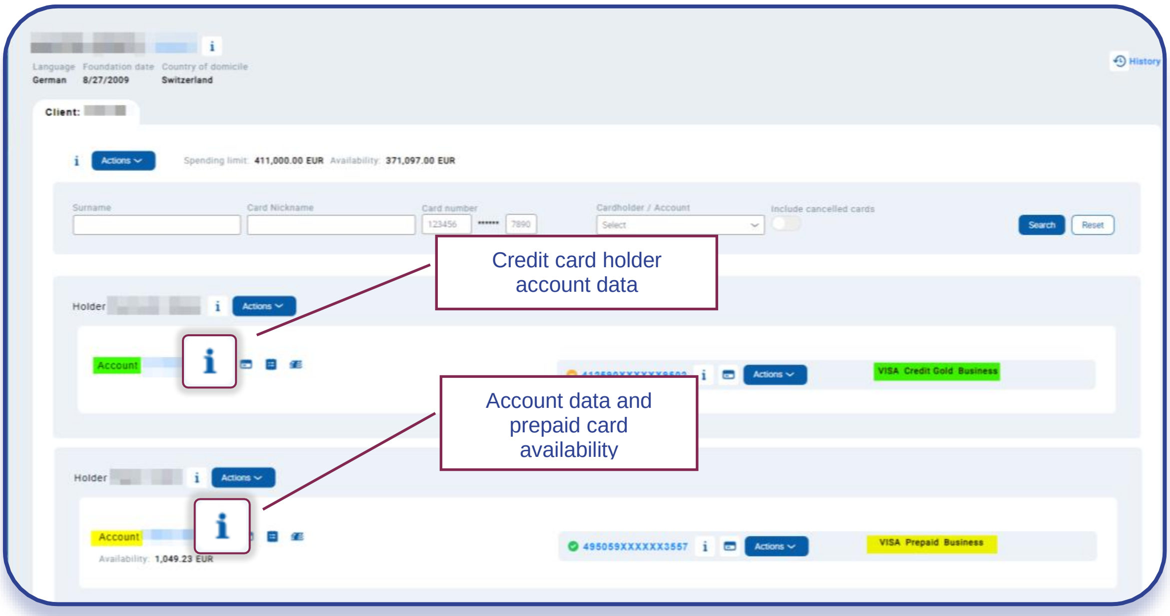
Lista dei pagamenti

Unità di fatturazione	Descrizione	Importo	Data
0004648859	Votre paiement	-265.00 CHF	21/12/2023
0004648859	Votre paiement	-190.95 CHF	28/11/2023
0004648859	Votre paiement	-259.00 CHF	27/10/2023
0004648859	Votre paiement	-340.70 CHF	27/09/2023
0004648859	Votre paiement	-94.60 CHF	25/08/2023
0004648859	Votre paiement	-406.10 CHF	28/07/2023
0004648859	Votre paiement	-11.95 CHF	04/07/2023
0004648859	Votre paiement	-290.40 CHF	02/06/2023
0004648859	Votre paiement	-1741.95 CHF	14/04/2023

Alternatively, you can search for the billing unit using the «Search Person».

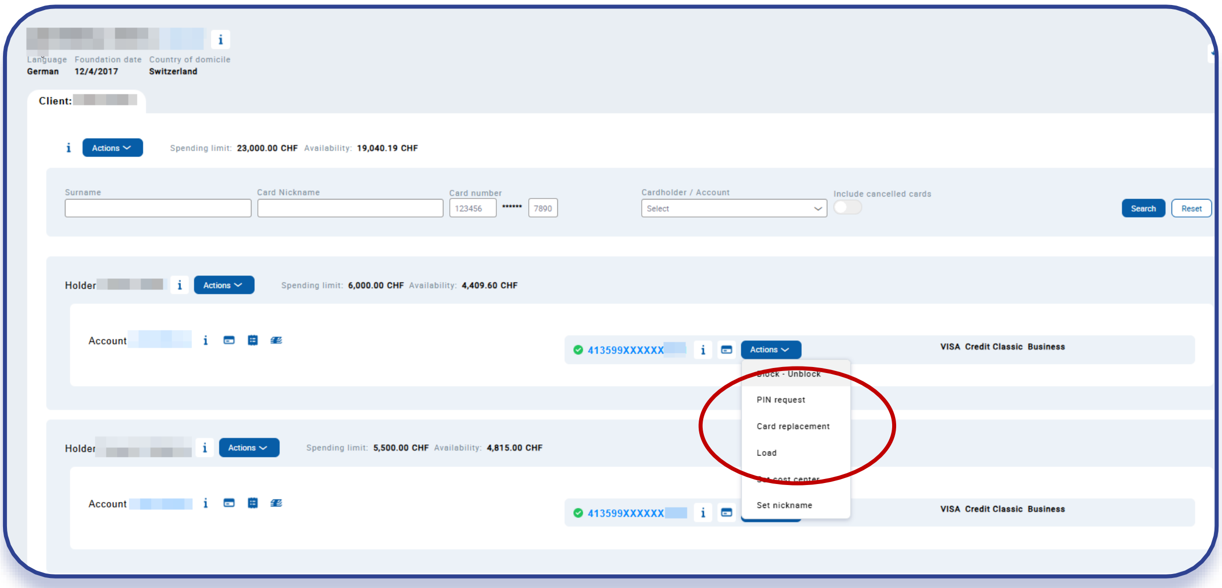
ACCOUNT DATA

The button next to the billing unit highlighted below shows some details on the billing unit (registered payment method, the IBAN for the bank transfer, the date of the last payment entered on the account and the amount of the last invoice).



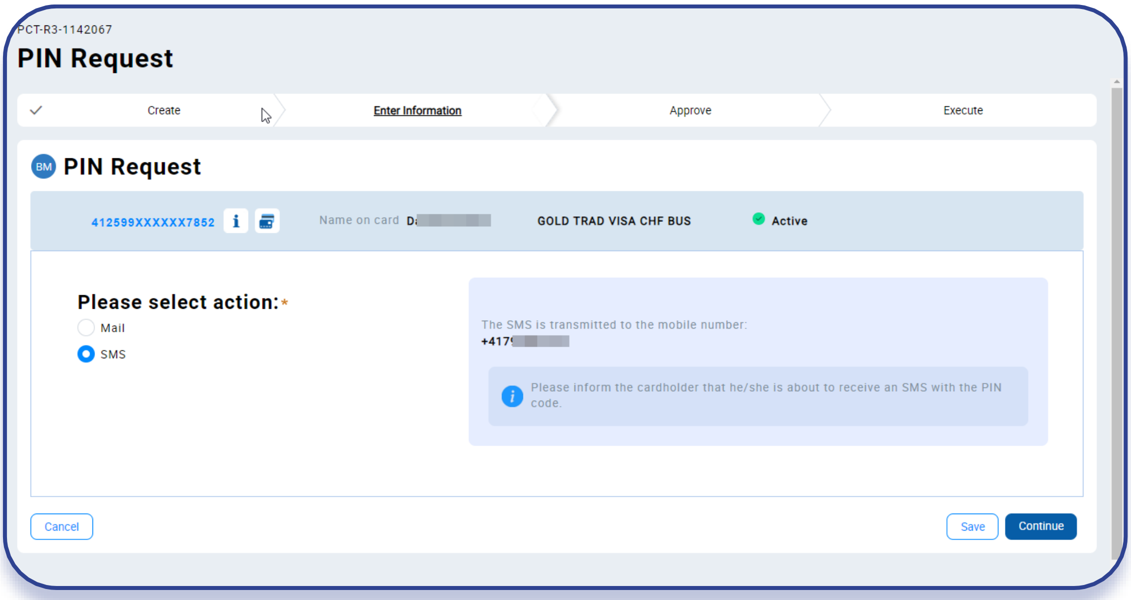
FUNCTIONALITY

You can see the active functions for the user by selecting the blue «Actions» symbol next to the card holder or the card in the «View Customer» section in the menu, which opens up a pop-up menu:



PIN REQUEST

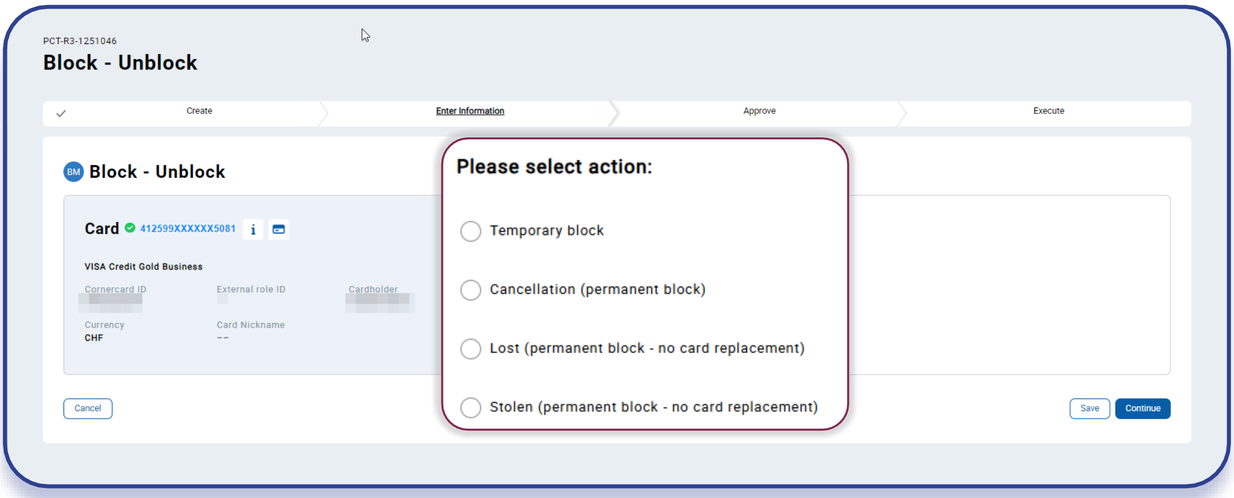
Search for the card via the "View Customer", click on the blue «Actions» symbol next to the card and select « PIN request» from the pop-up menu.
The process requires the mobile phone number to be confirmed if the PIN is sent via SMS to the card holder's mobile phone, or the delivery address if it is being sent by post.



BLOCK/UNBLOCK CARDS

Selecting the «Block/unblock» button starts a process that will enable the following actions:

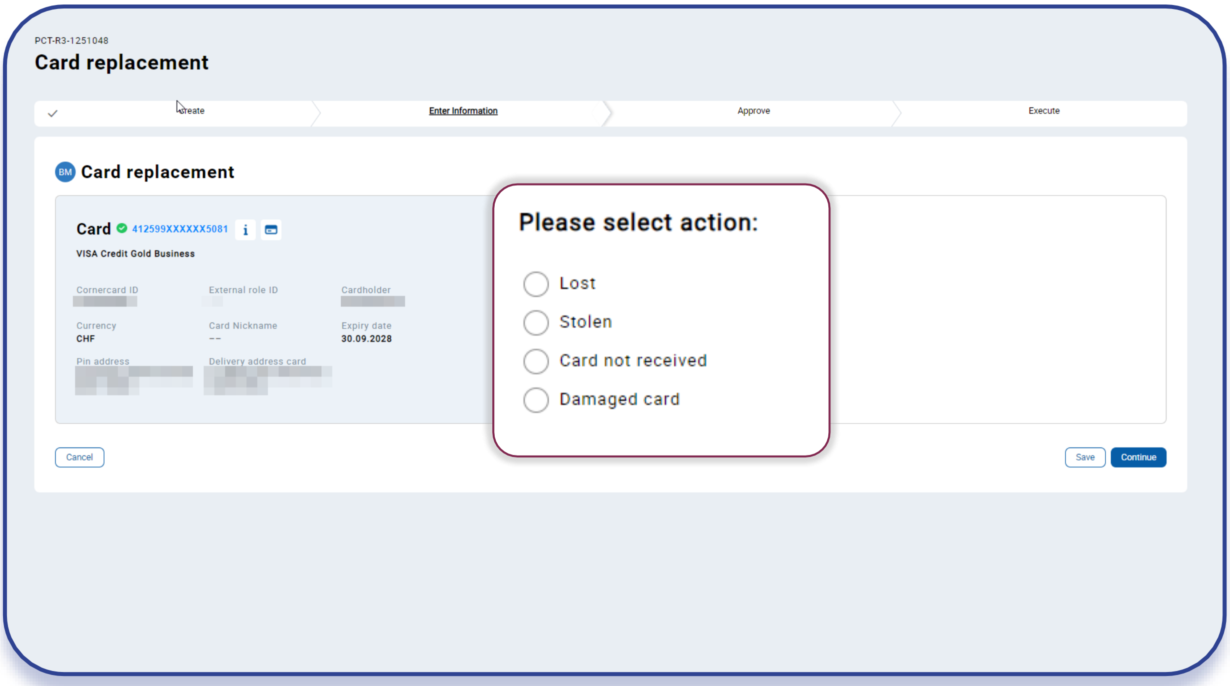
- **Temporary block** on the card (the card can then be reactivated, again via the PCT portal)
- **Cancellation (Permanent block)** of the card – **straight away** or on the card's expiry date. The card <u>cannot</u> then be reactivated.
- **Lost = Permanent block due to card loss** (note: this action <u>does not</u> issue a new card)
- **Stolen = Permanent block due to card theft** (note: this action <u>does not</u> issue a new card)



CARD REPLACEMENT

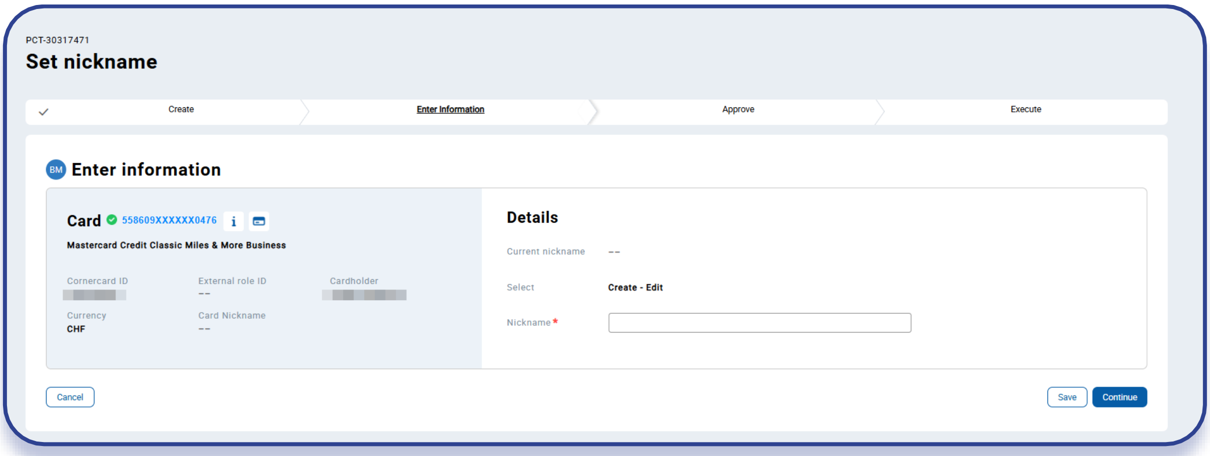
Select the «Card replacement» button and choose from the following actions:

- **Replacement card due to loss**
  You will need to confirm the date of the last transaction and the date on which the card was lost. A new card and a new PIN will be sent to the address specified.
- **Replacement card due to theft**
  You will need to confirm the date of the last transaction and the date on which the card was stolen. A new card and a new PIN will be sent to the address specified.
- **Replacement card due to non-receipt**
  You will need to confirm the client address. A new card and a new PIN will be sent to the address specified.
- **Replacement card due to damage**
  The same PIN code and card number are retained. The current card can remain active for a chosen period up to a maximum of 30 days.



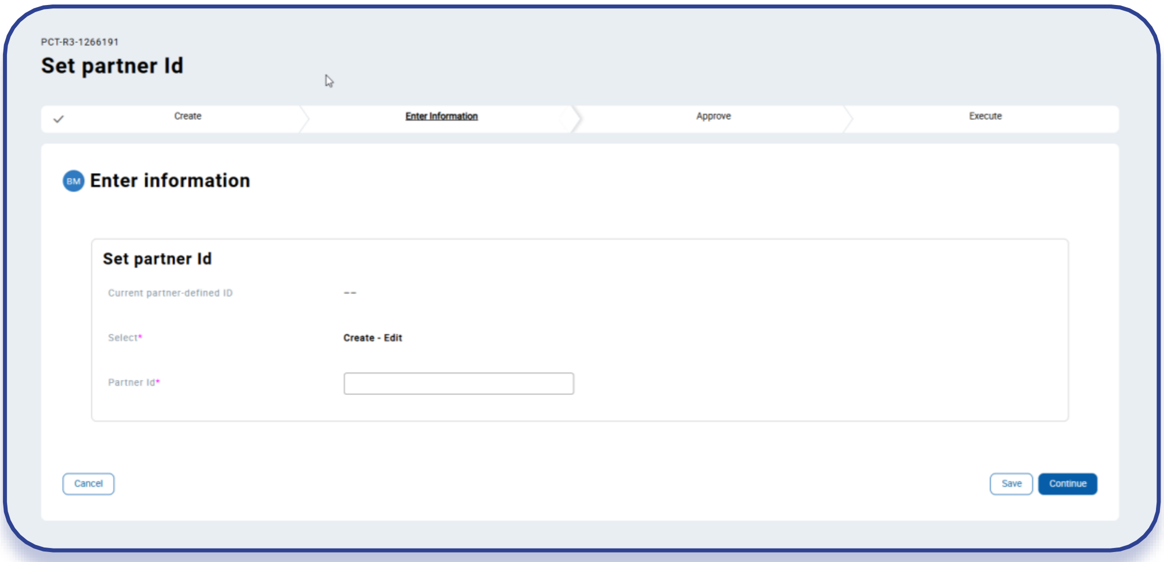
SET NICKNAME

This function allows you to assign a nickname to a card to enable faster searches.
The process can be started from the homepage, the quick actions, or from the customer view by clicking the blue «Action» button next to the card number.



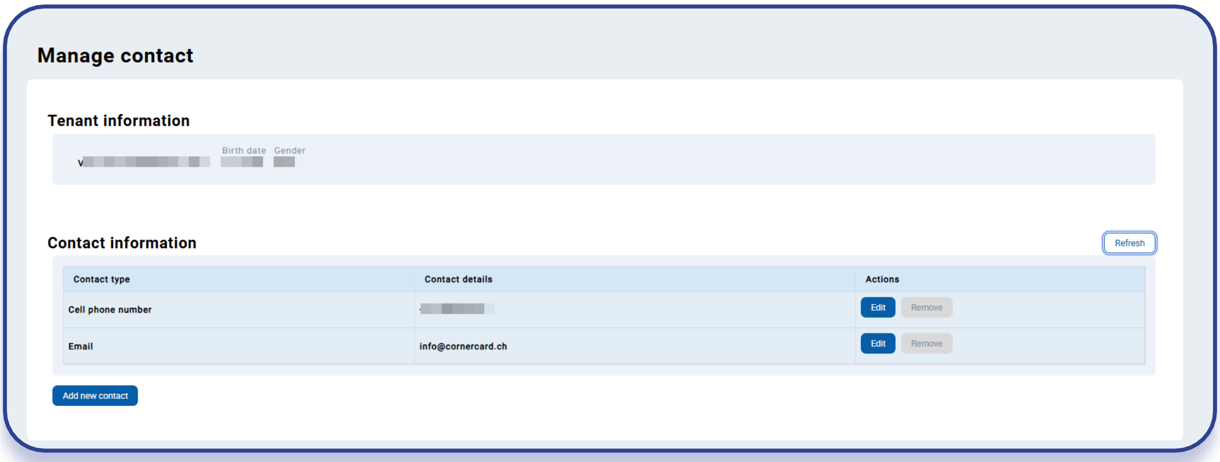
SET PARTNER ID

This function allows you to assign a code to a cardholder for easier searches.
The partner code may also be referred to as external role ID.
The process can be started from the Customer View by clicking the blue «Action» button next to the cardholder’s name.



CONTACT MANAGEMENT

This function allows you to update the phone number and email address of a cardholder. The process can be started from the Customer View or through the Person Search by clicking the blue «Action» button next to the cardholder's name.

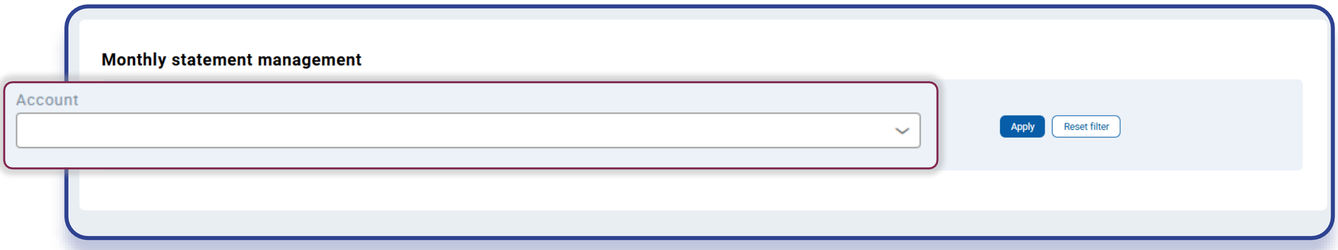


If the cardholder already has a customer relationship with another company or privately, the function is disabled to prevent changes that could affect the use of other cards.

> Contacts cannot be edited directly via the portal.

VIEWING MONTHLY CARD STATEMENTS

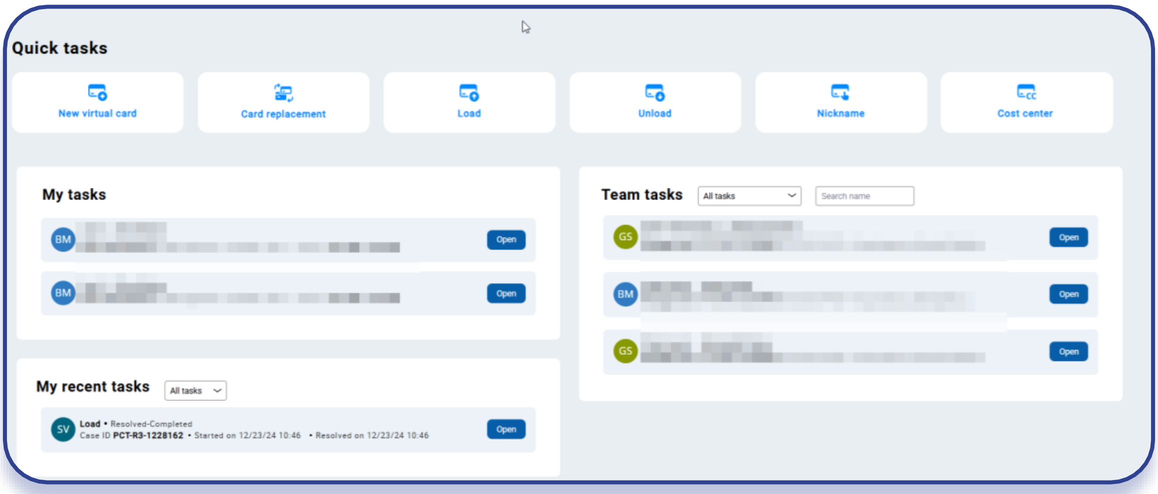
You can find all the monthly card statements in the «Statements» section. Search using the name of the card holder or the account number.



The monthly statements are also available in the «View Customer» section or the «Search Person» next to the billing unit by clicking on the symbol:

WORK LIST

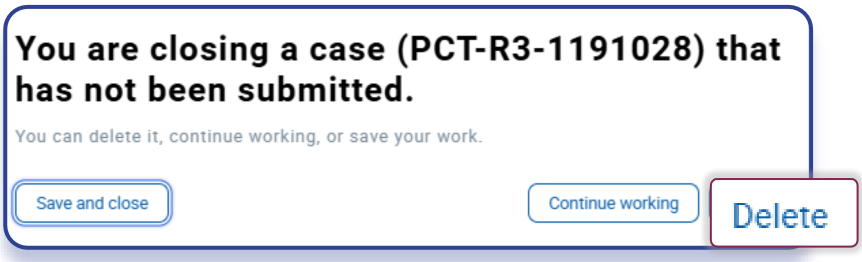
On the Home page, the user can find several sections which show the list of activities that have been started on the portal.



MY TASKS

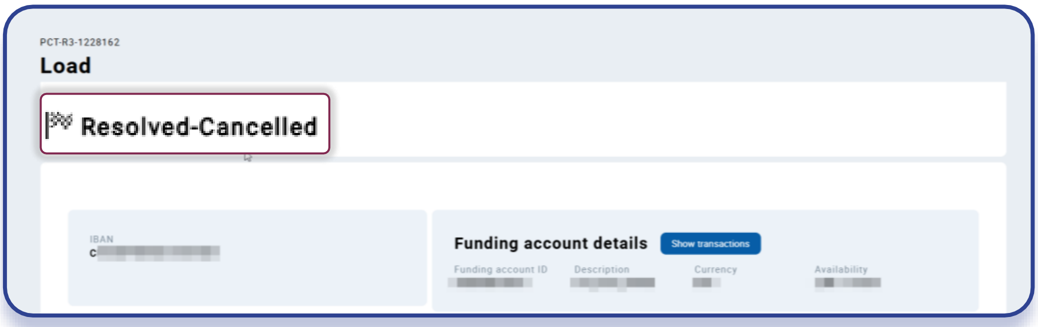
This is a list of activities that the user has started but not finished.
The list indicates the type of activity and the start date. To resume the task at any time, click on the «Open» button.
To conclude the task, you need to complete the process that has already been started. Once the task has been completed, it will no longer be visible in the «My tasks» list.

If you wish to cancel the task, simply reopen it, click on «Cancel» in the bottom left-hand corner, and then confirm by pressing «Delete».



MY RECENT TASKS

This is the list of completed processes (which may have been completed successfully or in error). The status of the completed task is indicated in the case details above.



Resolved – completed:	the process was successfully completed.
Resolved – error:	the process ended in error and the request failed.
Resolved – deleted:	the process was cancelled/deleted as described in the previous paragraph.

TEAM TASKS

This list shows portal users' requests that require additional approval by a user in a «Supervisor» role (four-eyes principle).
If the «four-eyes principle» review method has not been set for any function, this list will be empty. If a request needs to be authorised by a Supervisor, this will be listed. Only a Supervisor user will be able to view the «Open» button in order to open the request and to either approve or reject it.
Please note that the Supervisor role (approving requests using the four-eyes principle) can only be assigned to a user by an admin user.

Version 4 / 01.09.2025

Visit the page

CORNERCARD.CH/E/PCT-GUIDE

to consult the portal user manual.