

PARTNER COLLABORATION TOOL (PCT) – QUICK GUIDE

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

PCT.CORNER.CH

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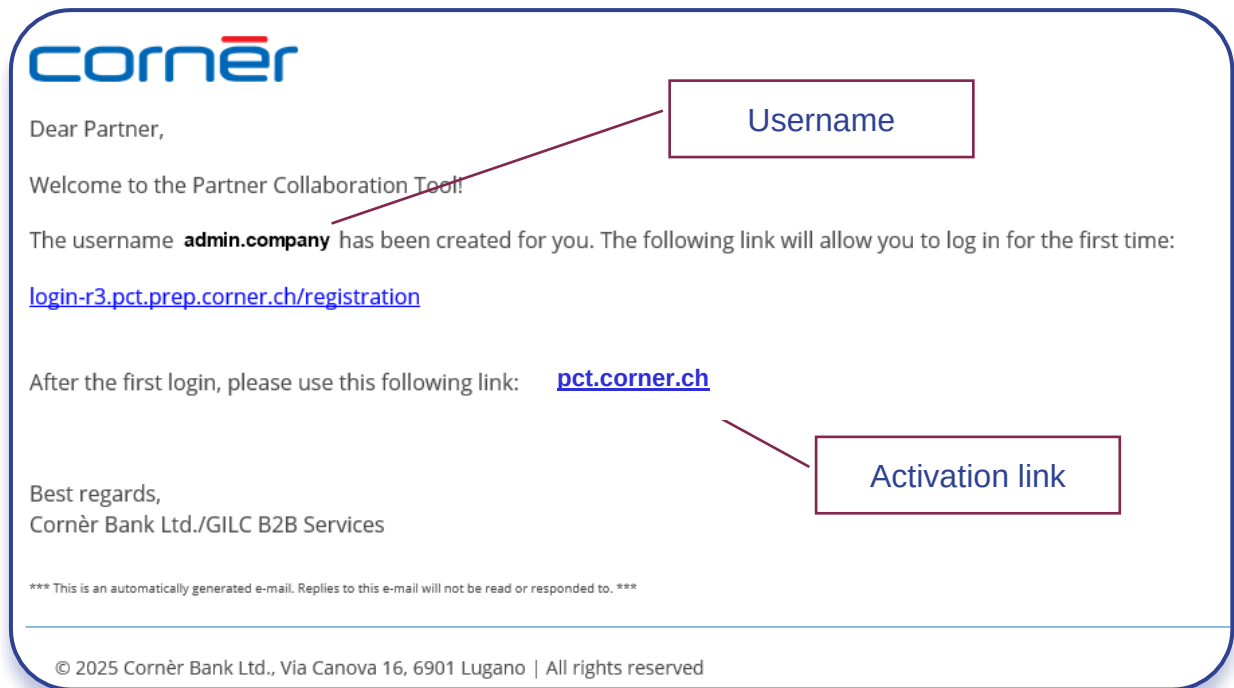
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FIRST LOG-IN

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.



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.

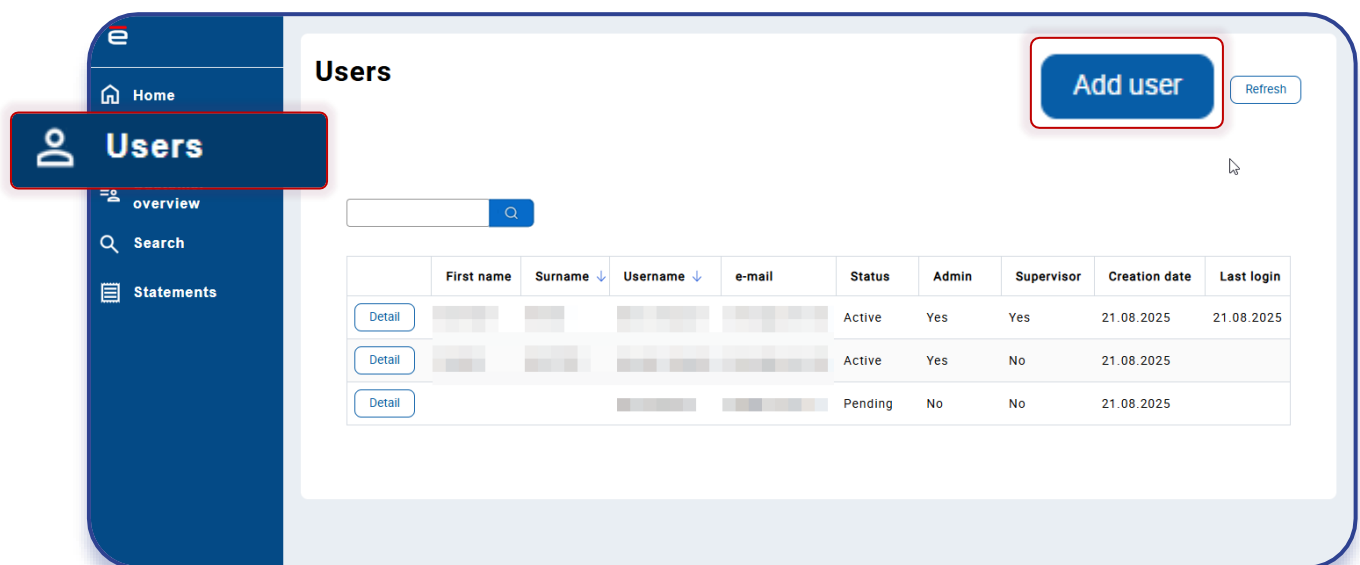
USER MANAGEMENT (ONLY FOR THE ADMINISTRATOR)

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.

US-R3-68019

Add user

Create Enter information Update user

Select process

Process type *

Full

When creating the user, the administrator is asked to provide some personal data

When creating the user, the administrator is asked to provide all personal data of the

Cancel Save Continue

AUTHENTICATION METHODS

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

US-R3-68019

Add user

✓ Create Enter information Update user

General information

Login details

Username prefix * Authentication mode *
Please select Please select

Personal information

Gender * First name * Surname *

Please select Please select Please select

Date of birth * Country of residence * Nationality *

Please select Please select Please select

Email * Mobile phone * Language *

Please select E.g. +41795964799 Please select

Cancel Save Continue

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».**

user.Company

Deactivate user

Reset access credentials

Close

Pending

GENERAL INFORMATION

RIGHTS AND PERMISSIONS

Personal information

Gender	First name	Surname
--	--	--
Date of birth	Country of residence	Nationality
--	--	--
Email	Mobile phone	Language
		Italian

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.

user.Company

Block user

Reset access credentials

Edit user

Close

Pending

GENERAL INFORMATION

RIGHTS AND PERMISSIONS

Personal information

Gender	First name	Surname
--	--	--
Date of birth	Country of residence	Nationality
--	--	--
Email	Mobile phone	Language
		Italian

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.

user.Company

Delete user

Reset access credentials

Edit user

Close

Pending

GENERAL INFORMATION

RIGHTS AND PERMISSIONS

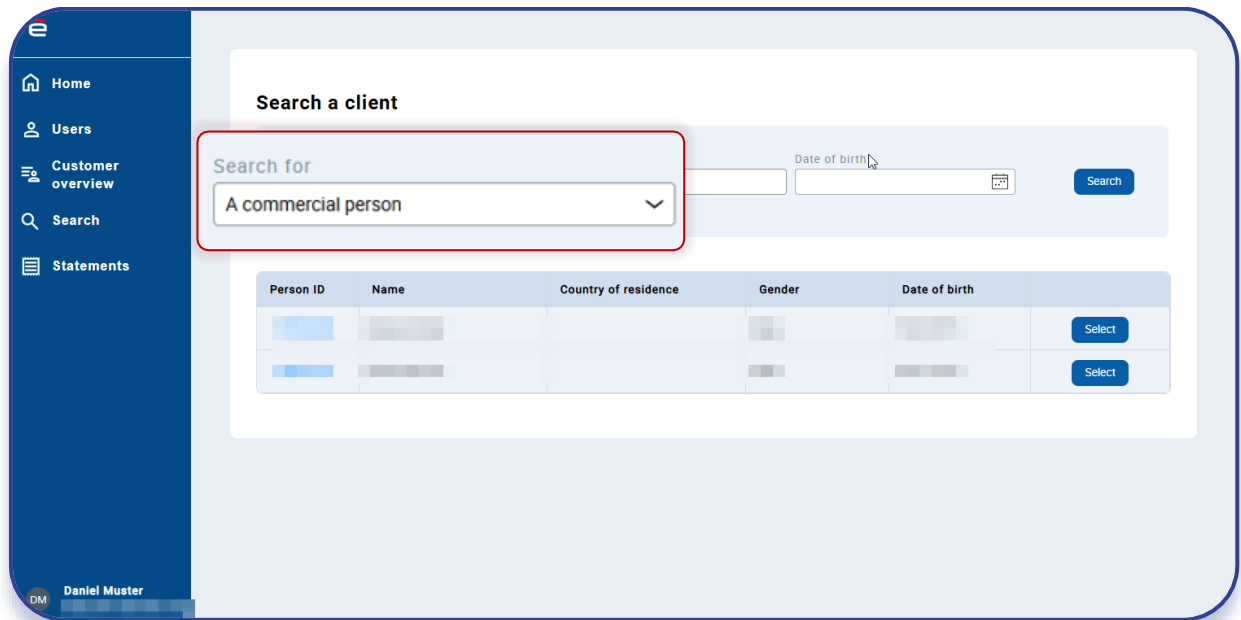
Personal information

Gender	First name	Surname
--	--	--
Date of birth	Country of residence	Nationality
--	--	--
Email	Mobile phone	Language
		Italian

VIEW CUSTOMER

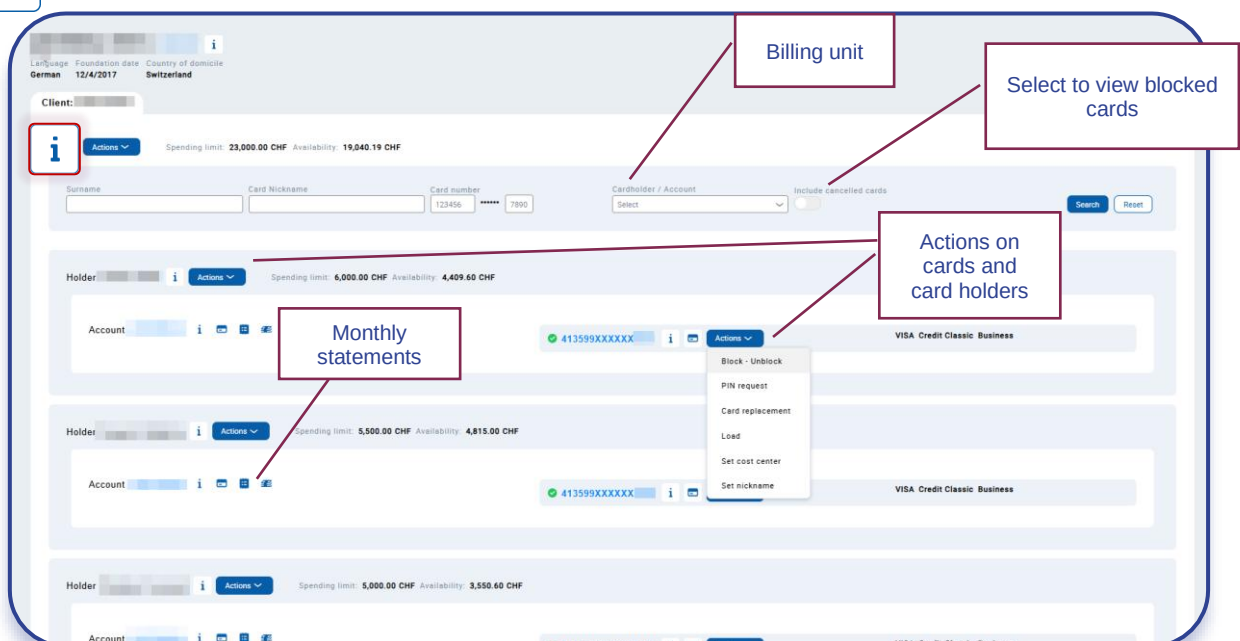
All company cards can be seen in the «View Customer» section in the menu.

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:



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.

Florida Municipal Power Agency

Language: Italian | Organizational form: Limited company | Foundation date: 4/20/1908 | Country of domicile: Switzerland

Account transactions

View transactions

Select

Set time period

2/1/2024

2/8/2024

XLSX

CSV

	Transaction date	Transaction status	Card number	Card holder name	Merchant name	Description	Merchant code	Merchant country	Amount paid	Amount billed
Show details	08/02/2024	Settled	558609XXXXX8165		MADISON VILLAGE	MADISON VILLAGE, LUGANO	3666	CHE	24.12 CHF	24.12 CHF
Show details	07/02/2024	Settled	558609XXXXX8165		MINT LEAF OF LONDON	MINT LEAF OF LONDON, LUGANO	3795	CHE	19.72 CHF	19.72 CHF
Show details	06/02/2024	Settled	558609XXXXX8165		HERTZ	HERTZ, LUGANO	7394	CHE	14.84 CHF	14.84 CHF

Holder: 1200073416

558609XXXXX4227

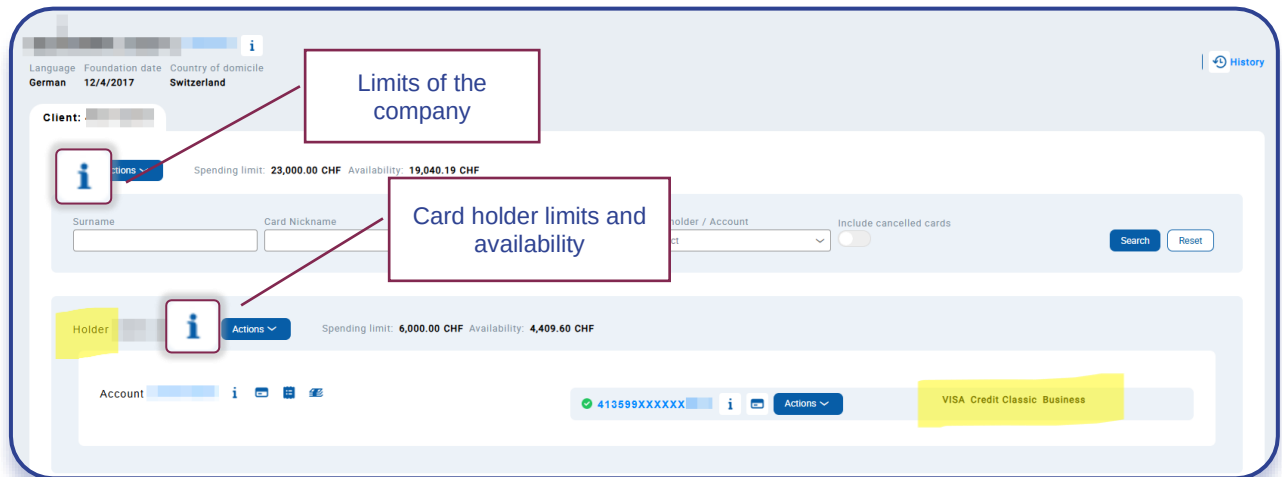
Mastercard Credit Classic

Holder: 1200073416

558609XXXXX8264

Mastercard Credit Classic

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



9

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».

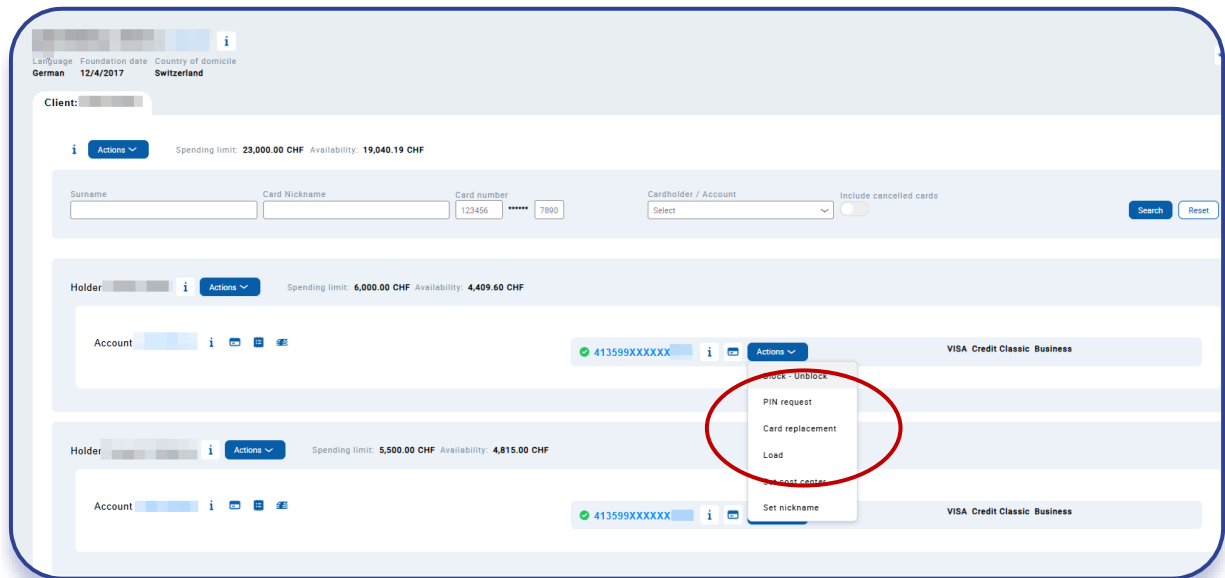
ACCOUNT DATA

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).

The screenshot displays a user interface for managing accounts. At the top, there's a header with 'Client:' and a search bar. Below this, a table lists accounts. Two callouts are present: one pointing to an 'i' icon next to a card account, labeled 'Credit card holder account data', and another pointing to an 'i' icon next to a prepaid card account, labeled 'Account data and prepaid card availability'. The interface also shows a spending limit of 411,000.00 EUR and an availability of 371,097.00 EUR.

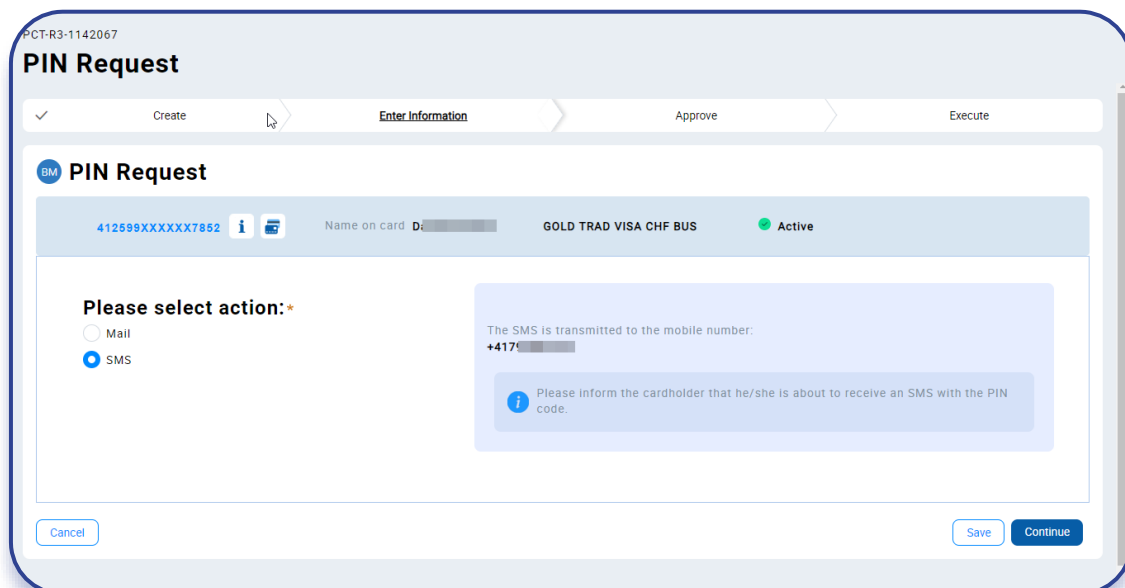
FUNCTIONALITY

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 cannot then be reactivated.
- **Lost = Permanent block due to card loss** (note: this action does not issue a new card)
- **Stolen = Permanent block due to card theft** (note: this action does not issue a new card)

PCT-R3-1251046

Block - Unblock

✓ Create > **Enter Information** > Approve > Execute

Block - Unblock

Card 412599XXXXX5081

VISA Credit Gold Business

Corneccard ID	External role ID	Cardholder
Currency	Card Nickname	
CHF	--	

Cancel

Please select action:

☐ Temporary block

☐ Cancellation (permanent block)

☐ Lost (permanent block - no card replacement)

☐ Stolen (permanent block - no card replacement)

Save Continue

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.

The screenshot displays a web interface for card replacement. At the top, a progress bar shows four steps: 'Create', 'Enter information', 'Approve', and 'Execute'. The 'Create' step is active. Below the progress bar, the main content area is titled 'Card replacement' and shows details for a 'VISA Credit Gold Business' card. The card details include a card number (412599XXXXX5081), currency (CHF), and an expiry date (30.09.2028). A modal dialog box is open in the center, titled 'Please select action:', with four radio button options: 'Lost', 'Stolen', 'Card not received', and 'Damaged card'. The 'Continue' button is highlighted in blue.

PCT-R3-1251048

Card replacement

✓ Create > Enter information > Approve > Execute

Card replacement

Card 412599XXXXX5081 i

VISA Credit Gold Business

Connercard ID	External role ID	Cardholder
CHF	Card Nickname	Expiry date
Pin address	Delivery address card	30.09.2028

Cancel

Please select action:

- ☐ Lost
- ☐ Stolen
- ☐ Card not received
- ☐ Damaged card

Save Continue

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.

The screenshot shows a web application window titled "Set nickname" with a reference ID "PCT-30317471". The interface includes a progress bar with four steps: "Create", "Enter information" (the active step), "Approve", and "Execute". Below the progress bar, the "Enter information" section is displayed. On the left, a card summary for a "Mastercard Credit Classic Miles & More Business" is shown, including fields for "Comercard ID", "External role ID", "Cardholder", and "Currency" (CHF). On the right, a "Details" section contains a "Current nickname" field (displaying "--") and a "Nickname" input field with a red asterisk indicating it is required. A "Create - Edit" link is positioned above the input field. At the bottom of the form, there are "Cancel", "Save", and "Continue" buttons.

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.

The screenshot shows a web application window titled "Set partner Id" with a reference ID "PCT-R3-1266191". The interface includes a progress bar with four steps: "Create", "Enter information" (the active step), "Approve", and "Execute". Below the progress bar, the "Enter information" section is displayed. It contains a "Set partner Id" form with a "Current partner-defined ID" field (displaying "--") and a "Partner Id" input field with a red asterisk indicating it is required. A "Select*" link and a "Create - Edit" link are positioned above the input field. At the bottom of the form, there are "Cancel", "Save", and "Continue" buttons.

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.

Manage contact

Tenant information

V

Birth date

Gender

Contact information

Refresh

Contact type	Contact details	Actions
Cell phone number		Edit Remove
Email	info@cornercard.ch	Edit Remove

Add new contact

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.

Monthly statement management

Account

Apply

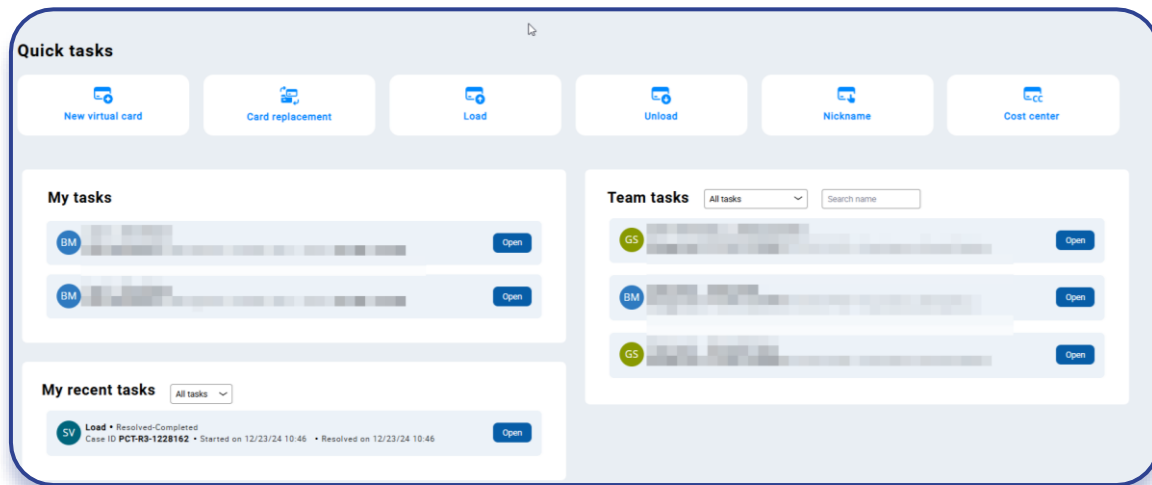
Reset filter

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».

You are closing a case (PCT-R3-1191028) that has not been submitted.

You can delete it, continue working, or save your work.

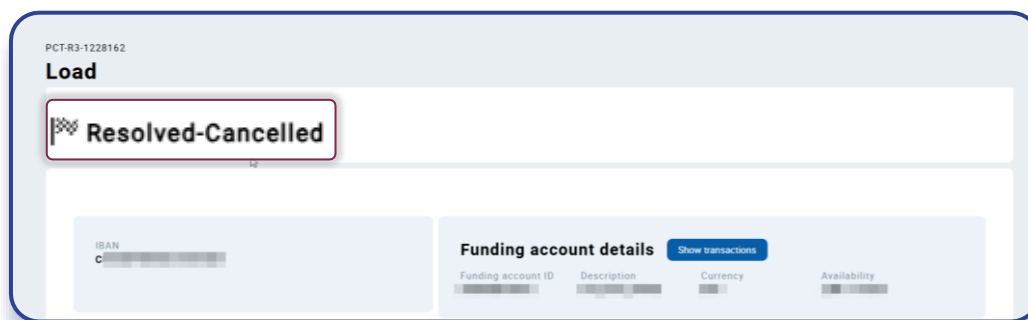
Save and close

Continue working

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.