

PARTNER COLLABORATION TOOL (PCT) – QUICK GUIDE

VIRTUAL CORPORATE SOLUTION (VCS)

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

[PCT.CORNER.CH](https://pct.corner.ch)

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VIRTUAL CARD

VIRTUAL CARD CREATION

You can start creating a card:

- on the Homepage (Quick action)
- by first selecting the specific main card via the 'Customer Card' section of the menu, and selecting the blue "Action" button.

MAIN CARD DATA

Account: Select the required account (if there are several).

Main Card: Select the related principal card to be used for the creation of the VCN. You will receive a monthly statement for each principal card.

VIRTUAL CARD DATA

Nickname of new card: Give the card a name or add a description. This name will serve as a reference on the portal.

Spending limit: Define the maximum spending amount for this card. The spending limit amount of the virtual card refers to the entire period of validity chosen for the card.

Valid from and Valid to: Define the validity period of the card. At the end of the validity of the card it is automatically deactivated and can no longer be changed.

SECURITY OPTIONS

3D Secure: enter a cell phone number for secure online transactions.

Please note: Once the virtual card has been created, this choice cannot be changed.

The screenshot displays the 'Virtual card creation request ID: PCT-30160557' at the top. Below this is a progress bar with three stages: 'Enter information' (active), 'Approve', and 'Execute'. The 'Enter information' section is divided into three main areas:

- Main card data:** Includes dropdown menus for 'Account' and 'Main card', both with a 'Select' option.
- Virtual card data:** Includes a text field for 'Nickname of new card', a text field for 'Spending limit' with a 'CHF' currency selector, and date pickers for 'Valid from' (7/25/2024) and 'Valid to' (M/d/yyyy).
- Security options:** Includes a toggle for '3-D Secure' (currently turned on) and a text field for 'Mobile phone' with a '+41' country code prefix.

At the bottom, there are six reference fields labeled 'Reference 1' through 'Reference 6' arranged in a 2x3 grid.

REFERENCE 1 - 6

Please provide the reference fields needed to reconcile your transactions. These references will be linked to every transactions made with the virtual card you are about to create, and they will appear on the statement and transaction lists.

ADVANCED OPTIONS

VELOCITY (OPTIONAL)

Velocity settings allows you to further define the maximum transaction amount and maximum number of transaction for a specific timeframe.

Timeframe: Define the timeframe of the subset of restrictions in terms of number of days, weeks or months. *E.g. 1 Week*

Number of transactions: Define the maximum number of allowed transactions in the above defined timeframe. *E.g. 3 transactions*

Total Amount: Define the total amount allowed in the above defined timeframe. *E.g. 300 CHF*

The screenshot shows a web interface for creating a virtual card. On the left is a dark blue sidebar with a logo and navigation links: Home, Users, View Customer, and Statements. The main content area has a header 'Virtual card creation request ID: PCT-30160557'. Below this is a section titled 'Advanced options' with a dropdown arrow. Under 'Velocity', there are three input fields: 'Timeframe' with the value '1', 'Number of transactions' with the value '3', and 'Total amount' with the value '300' and a currency dropdown set to 'CHF'. To the right of these fields is an information box with two paragraphs: 'Number of transactions: enter the maximum number of transactions that can be made during the timeframe selected above.' and 'Total amount: enter the maximum total amount that may be spent with this card during the timeframe selected above. E.g. 1 month and CHF 100 - in 1 month a maximum of CHF 100 may be spent with this card. From the month after that, CHF 100 may be spent again, etc.'

In the example we have defined a card that under the spending limit defined in the virtual card data section, will further restrict its spending allowing every week a maximum of 3 transactions and a total spending of maximum 300 CHF.

ALLOWED CURRENCY

By default, the card allows transactions in all currencies.

Leave this field blank if you wish to allow transactions in all currencies. If you wish to limit the currencies allowed instead, select the currency from the list. *The virtual card will then only accept transactions in the selected currency.*

The screenshot shows a single input field labeled 'Currency restriction' with a dropdown arrow. To the right of the field is an information box with two paragraphs: 'Change allowed currency: select this field to limit the card to a specific currency. E.g. EUR - the virtual card will only accept transactions made in EUR.' and 'ATTENTION: this selection does not affect the currency of the monthly statement. The monthly statement will still be issued in the currency of the main card.'

CARD PRODUCT

By default your card will be a Mastercard. You can select another card product from the dropdown menu.

The screenshot shows a single input field labeled 'Card product' with a dropdown arrow.

CARD USAGE

Please select how you want to use the card.

Display card on the portal

After clicking submit, you will have the chance of reviewing your data. Confirm and you will see the card details in full.

The screenshot shows a form titled "How do you want to use the card?". It has three radio button options: "Display card details on the portal" (which is selected and highlighted with a yellow box), "Send card details via secure email", and "Mobile wallet usage - Send card details via secure email". To the right of the options is an information box with an 'i' icon and the text: "IMPORTANT: The complete data of the new virtual card will be displayed at the end of the process. If you want to save or pass on the card data, we recommend that you take all necessary security measures." At the bottom left is a "Cancel" button, and at the bottom right are "Save" and "Continue" buttons.

Send card details via secure e-mail

This option sends a link via e-mail to a recipient for card retrieval. The cell phone number provided is used as the second authentication method (SMS). For 3D Secure-enabled cards, the number used is the one listed in the security options.

After clicking "Confirm" you can review the data. Once confirmed, an e-mail containing a link to retrieve the card is sent to the recipient.

The screenshot shows the same form as before, but now "Send card details via secure email" is selected and highlighted with a yellow box. The form now includes additional fields on the right: a "Language" dropdown menu set to "English", a "Mobile phone" field with two dashes "--", and an "Email" field with a red asterisk indicating it is required. The "Cancel", "Save", and "Continue" buttons remain at the bottom.

Mobile wallet usage

This option will prepare the card for mobile wallet usage and send a card retrieval link to an email recipient. The Mobile phone number will serve as a second authentication method (SMS), and for the card activation into the mobile wallet (e.g. Apple Pay or Google Pay). For 3D Secure enabled cards, the number will be inherited from the number defined in the security options.

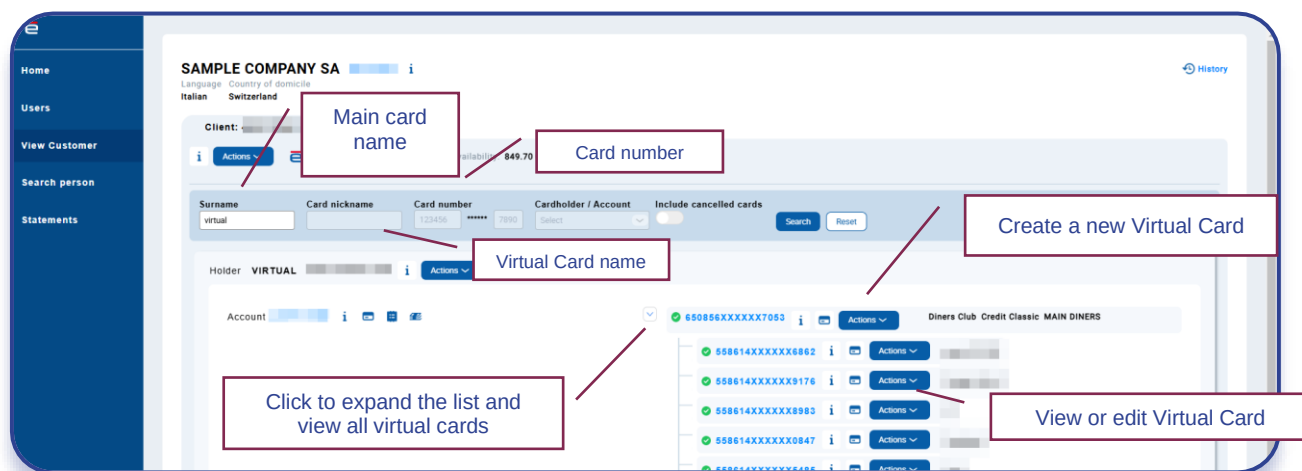
After clicking submit, you will have the chance of reviewing your data. Confirm and a card retrieval link will be sent to the email recipient. The end user of the card will then need to manually add the card into their wallet by entering the card details.

The screenshot shows the form with "Mobile wallet usage - Send card details via secure email" selected and highlighted with a yellow box. An information box at the top right states: "IMPORTANT: the recipient receives the card details by email and can then add them to the wallet." Below this, there is a "First name and surname of the card recipient" field with a red asterisk. The "Language" dropdown is set to "English", the "Mobile phone" field has two dashes "--", and the "Email" field has a red asterisk. The "Cancel", "Save", and "Continue" buttons are at the bottom.

VIEW AND EDIT VIRTUAL CARDS

After card creation you can find your virtual cards under the View customer menu.

Search for the cards with the search parameters, you can see all the cards by expanding the list.

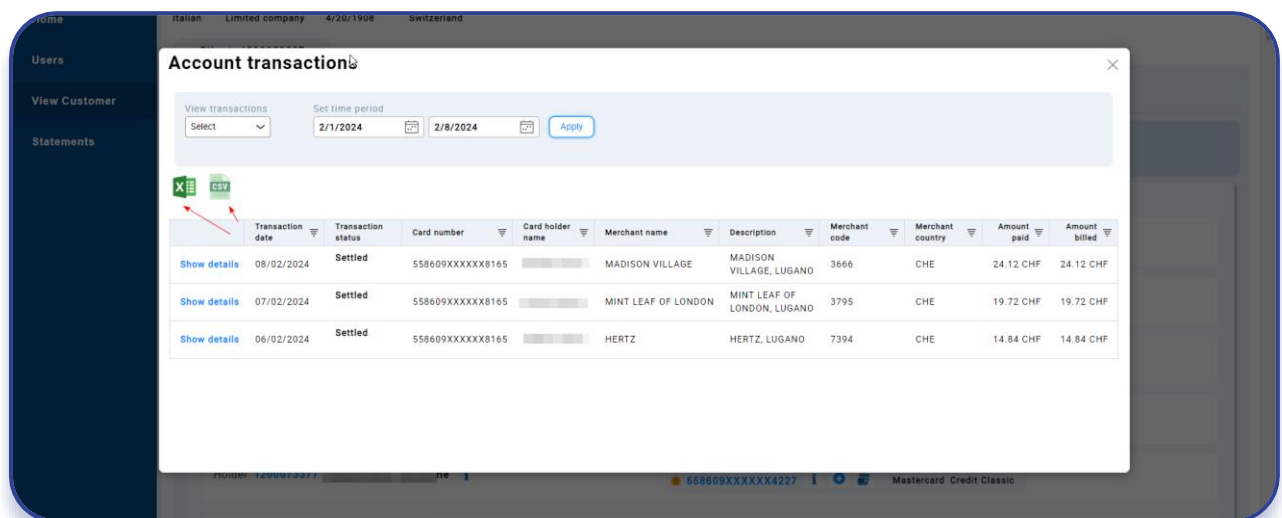
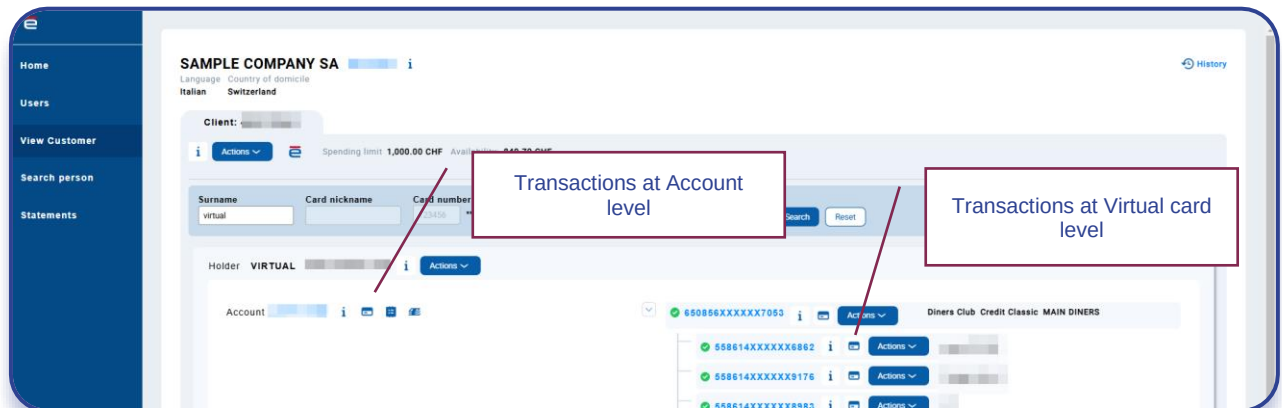


TRANSACTION LISTS

You can find your cards under the View customer menu.

Search for the cards with the search parameters, you can see all the virtual cards by expanding the list.

You can find transactions for an individual card or an account by clicking on the symbol . You can filter transactions for a desired time period and you can download the results in Excel.xlsx or CSV format.



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Visit

CORNERCARD.CH/E/PCT-GUIDE

to view the portal user manual.