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LOGIN PROCESS

Login with username (email address) & temporary password. First time users will be prompted to update password on initial login.

LISTING OF ACCOUNTS

**Step 1:** From the home screen, choose Account Overview from Quick Links **OR** from your company hierarchy screen, select 📊 under Actions.

**NOTE:** To include Virtual Accounts, check the box next to Virtual Accounts in the top right.

VIEW COMPANY CREDIT LIMIT

**Step 1:** From the home screen, choose Account Overview from Quick Links **OR** from your company hierarchy screen, select 📊 under Actions.

**Step 2:** Select the Billing Account.

**Step 3:** Choose More in the Account Balance Information section.

Account Balance Summary will include the current company balance and the credit limit.
**Step 1:** From the home screen, choose Account Overview from Quick Links OR from your company hierarchy screen, select ☰ under Actions.

**Step 2:** Select the Billing Account.

**Step 3:** Choose More in the Account Balance Information section.

**Step 4:** Select View Pending Balance to view current authorizations or Declined Transactions to view current declines.
ADD A PAYMENT ACCOUNT

**Step 1:** From the home screen, choose Make a Payment from Quick Links OR from company hierarchy screen, select $ under Actions.

**Step 2:** Choose $Add New$ in the bottom right to add a payment account.

**Step 3:** Complete remaining fields (highlighted fields required), followed by Save.

MAKE A PAYMENT

**Step 1:** From the home screen, choose Make a Payment from Quick Links OR from company hierarchy screen, select $ under Actions.

For **consolidated billing**, select the **Billing Account** by checking the appropriate box on the left.

For **individual billing**, choose the account by checking the appropriate box on the left of the account you wish to make a payment.

**Step 2:** Choose $Make Payments$.

**Step 3:** Complete the fields listed, including the email address to send a confirmation, followed by Pay.  
**Note:** Payments submitted after 5:00 p.m. ET will be credited to your account on the following business day.

VIEW PAYMENT HISTORY

**Step 1:** From the home screen, choose Make a Payment from Quick Links OR from company hierarchy screen, select $ under Actions.

**Step 2:** Choose $Show Payment History$ from the bottom right.
Step 1: From the home screen, choose Online Request from Quick Links OR from the Company Hierarchy screen, select 🔄 under Actions.

Step 2: Select Change Credit Limit from Online Requests.

Step 3: Enter cardholder name or last four of account number.

Step 4: Complete remaining fields: memo, request type and new credit limit, followed by Submit for permanent limit updates.

Step 5: For temporary limit updates, choose Temporary Credit Limit from the request type drop down, choose the amount to increase the limit by and the expiration on that temporary increase, followed by Submit.

Updates can also be made from the account listing screen.

Step 1: From the home screen, choose Account Overview from your Quick Links OR from your company hierarchy screen, select 🔄 under Actions

Step 2: Select 🔄 next to the credit limit and refer to steps above.
To ensure account is created on the correct billing account, follow the instructions below.

**Step 1:** Choose Company Management, followed by Search Company

**Step 2:** Select View Hierarchy under Actions OR from the Company Hierarchy screen, select under Actions.

**Step 3:** Choose Add New Cardholder Request under Online Requests.

Ensure you select the correct Sublevel ID/Name. This is the billing account you wish the new account to roll into.

**Step 4:** Complete the remaining required fields highlighted in yellow, followed by Submit in the bottom left.

Notes:
- For Type Processing, choose 50 – Corporate Account.
- If utilizing custom plastics, submit requests for new cards to CommercialCards@htlf.com. Please indicate in that communication the use of custom plastics.
- Please allow 7-10 business days for new cards to arrive.
VIRTUAL CARDS

VIEW ACCOUNT INFORMATION

**Step 1:** From the home screen, choose Online Request from Quick Links **OR** from the Company Hierarchy screen, select under Actions.

**Step 2:** Select View Virtual Security Account Data.

**Step 3:** Type the name of the account under Cardholder Name, followed by Submit.

ORDER NEW VIRTUAL ACCOUNT

**Step 1:** From the home screen, choose Online Request from Quick Links **OR** from the Company Hierarchy screen, select under Actions.

**Step 2:** Choose Add New Cardholder Request under Online Requests.

**Step 3:** **Ensure you select the correct Sublevel ID/Name. This is the billing account you wish the new account to roll into.**

**Step 4:** **Next, ensure you select the correct Product. The Virtual Card product will start with "VCPXXX or VCBXXX"**

**Step 5:** Complete the remainder of the form, including all required fields highlighted in yellow, followed by Submit. The Virtual Card information can be accessed immediately by following the steps above.
REQUEST REPLACEMENT CARD

**Step 1:** From the home screen, choose Online Request from Quick Links OR from the Company Hierarchy screen, select "Online Request" under Actions.

**Step 2:** Select Request Replacement Card from Online Requests.

**Step 3:** Enter the cardholder name for replacement, and complete the highlighted required fields, followed by Submit.

*Note:* Please allow 7-10 business days for new plastics to arrive.

CLOSE ACCOUNT

**Step 1:** From the home screen, choose Online Request from Quick Links OR from the Company Hierarchy screen, select "Online Request" under Actions.

**Step 2:** Select Close Account Request from Online Requests.

**Step 3:** Enter the account name to close, and complete the highlighted required fields, followed by Submit.
**Step 1:** From the home screen, choose Online Request from Quick Links OR from the Company Hierarchy screen, select under Actions.

**Step 2:** Select Address and Phone Change from Online Requests.

**Step 3:** Enter the cardholder account to update, request type and complete the remaining highlighted required fields, followed by Submit.
ENROLL A CARDHOLDER IN EZCARD

Step 1: From the home screen, choose Account Overview from your Quick Links OR from your company hierarchy screen, select under Actions.

Step 2: Select the Account to enroll.

Step 3: Select More in the User Enrollment Details box.

Step 4: Select under actions of User Enrollment Status / User Activity.

Step 5: Complete the form, followed by Confirm to complete enrollment.

Note: The expiration date must match the expiration date on the account. The detail box to the left lists the expiration date.
RESET A CARDHOLDER’S PASSWORD OR UNLOCK A USER FOR EZCARD

**Step 1:** From the home screen, choose Account Overview from Quick Links OR from your company hierarchy screen, select under Actions.

**Step 2:** Select the Account to update password or unlock.

**Step 3:** Select More in the User Enrollment Details box.

**Step 4:** Choose to the right of Password Failures / Generate New Password to update. If user is locked out, select to unlock.
EMULATE A USER IN EZCARD

**Step 1:**  From the home screen, choose Account Overview from Quick Links OR from company hierarchy screen, select under Actions.

**Step 2:**  Select the Account to emulate.

**Step 3:**  Select More in the User Enrollment Details box.

**Step 4:**  Choose under the cardholder name on the left side.

**Note:** Any action taken while emulating is completing a task on behalf of the user. For example, making a payment while emulating will initiate a true payment.

DOWNLOAD TRANSACTIONS

**Step 1:**  From the home screen, choose Account Overview from Quick Links OR from company hierarchy screen, select under Actions.

**Step 2:**  Select in the top right corner.

**Step 3:**  Choose your time period.

**Step 4:**  Select .

**Step 5:**  Select under Transaction Report in the bottom right to choose the file type (QBO, CSV, Excel, etc.) for the export.