Quick Tips

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How to access Centre Suite Help Center

1. Navigate to Help
2. Click on Library, or Product Support.
   - Library: Online Card Management Administration Guide.
   - Product Support: Contact Information.

Note: this is located on the grey toolbar in the top right-hand corner of most screens

Commercial Card Support Team

Our dedicated Commercial Card Support Team specializes in Commercial Cards and can be reached 24/7. Below are some request types the team can assist you with.

- Statement Questions
- Payment Information
- Software Support
- Closing Cards

Phone: 800.892.7104
Fax: 816.760.7935
Email: Commercial.Cards@CommerceBank.com

Reset Password/ Unlock Account

1. Select the Password Reset/ Unlock Account from the login screen.
2. Follow prompts

ACH Filter Information

Company ID numbers to provide to your bank for an ACH filter to be set up

3101000019 – autopay
1991234567 – manual payment
0000002749 – quick remit payment

Dashboard Summary

View Account Details – This section will tell you the current credit limit, and you will allow you to download the most recent statement

View statements / View available balance / make payment

1. Click on Statements
2. Click on Account Activity
3. Click on Summary
   - Use search field to identify cardholder
4. Click on details
5. Click on Make Payment

Note: You may need to add in your bank account information such as account and routing number.
Note: The amount listed as "Available Balance" best reflects the amount of credit available. The current balance does not account for authorized transactions that have not yet posted.

View posted transactions and export transaction details

1. Click on Statements
2. Click on Account Activity
3. Click on Search
4. Identify account to view
5. Click on Details
6. Click on Transactions
7. View all recent transactions
8. Identify the statement cycle which you would like to view or download transactions
9. Select format in which you would like to see the transaction detail
10. Select Download

Note: All transactions posted for the date range selected will be displayed. Transactions are default sorted by posting date and provide the following information: Cardholder Name, Posting Date, Transaction Date, Merchant Name, Transaction Amount

QuickBooks

1. Click on Statements
2. Click on Account Activity
3. Click on Search
4. Identify account which you would like to view
5. Click on details
6. Click on Transactions
7. From here, you can view all recent transactions
8. From here, identify the statement cycle which you would like to view or download transactions
9. Select QuickBooks WebConnect in the download format tab
10. Select download

View recent authorization request

1. Click on Statements
2. Click on Account Activity
3. Click on Search
4. Identify account which you would like to view
5. Click on details
6. Click on Authorization requests
7. From here, you can view all recent authorizations

How to locate declined transactions

1. Click on Statements
2. Click on Account Activity
3. Click on Search
4. Identify account which you would like to view
5. Click on details
6. Click on Authorization requests
7. From here, you can view all recent authorizations
8. Click on the ellipse under details to the left of the decline transaction you are wanting to review
9. Reason will be listed at the bottom of transaction details

Note 1. Call Commercial Cards to determine the decline reason and get help with resolving the issue: 800.892.7104

How to view/download historical Statements

1. Click on Statements
2. Click on Account Activity
3. Click on Search
4. Identify account which you would like to view
5. Click on details
6. Click on Statements
7. From here, select the PDF icon to the right of the statement date of which you would like to download

How to add a new user

1. Click on Administration
2. Click on Maintain User Information
3. Click on the Add New User button
4. Click on the Select Location button
   - Select Search
   - Select the radio button of the applicable unit name
   - Select the Use the same unit for branding checkbox
   - Select the Okay button
5. Complete the following required fields
   - Contact Information: First Name, Last Name, Email Address
   - User Information: User ID, Password, Confirm Password

- Login Status: Yes is selected for Active & No is selected for Locked

6. Click on Save
7. Select Yes when the Add Access popup box appears.
8. Select the Add Access button

    To Add Cardholder access:

- Select the Account radio button
- Select Search
- Select the checkbox next to the card you wish to assign to the user
- Select the Make Owner checkbox
- Select Account Holder as the Security Profile
- Click the Add button

    To Add an administrator:

- Select the Unit radio button
- Select Search
- Select the checkbox next to the applicable unit you wish to assign to the user
- Select Include Subunits checkbox
- Select Organization Administrator as the Security Profile
- Select None as the Approval Profile
- Click the Add button