

September 2021

# Santander Commercial Card

## Sending Cardholder Email Guide

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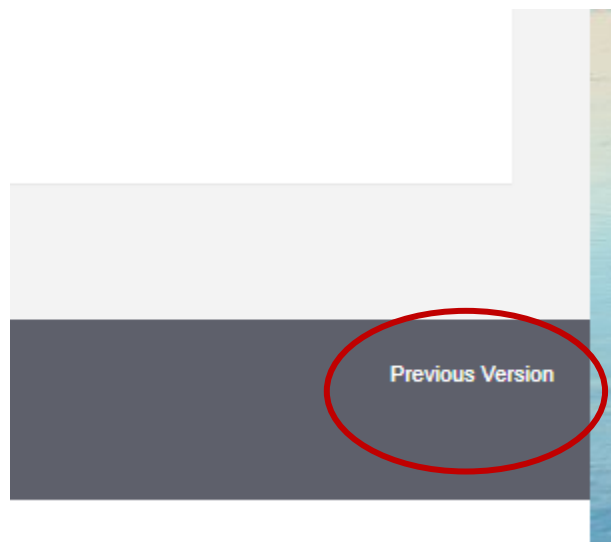
## 1. Introduction

This guide covers how to send an email to your cardholders through 360Control

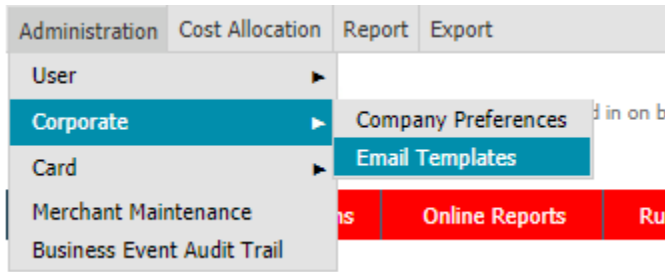
## 2. Creating an Email Template

Log in as a Company Program Administrator

Navigate to 'Previous Version' of the UI by clicking in the bottom right hand corner

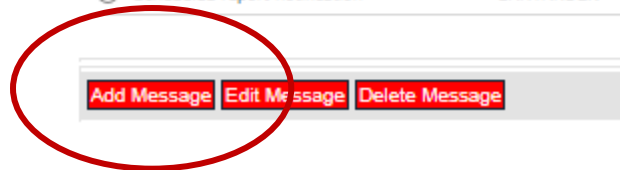


Navigate to Administration > Corporate > E-Mail Templates

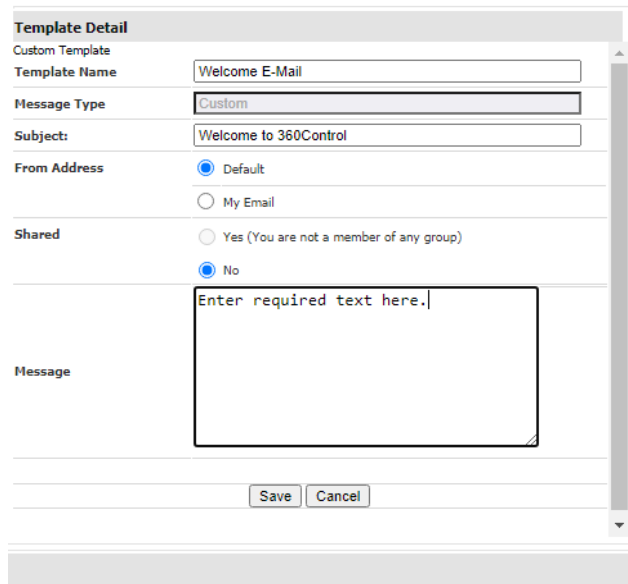


Click on the 'Add Message' button

<input type="radio"/>	Notification that user login locked out	SANTANDER
<input type="radio"/>	Notification when user login is unlocked	SANTANDER
<input type="radio"/>	Online card request changes	SANTANDER
<input type="radio"/>	Password email for self registration	SANTANDER
<input type="radio"/>	Request a new user login	SANTANDER
<input type="radio"/>	Scheduled export notification	SANTANDER
<input type="radio"/>	Scheduled report notification	SANTANDER



On the right-hand side of the screen, enter an E-Mail Template Name, a Subject Line, and the Content of the E-Mail.



**Template Detail**  
Custom Template

Template Name:

Message Type:

Subject:

From Address:  Default  
 My Email

Shared:  Yes (You are not a member of any group)  
 No

Message:

We have a sample email for you to **personalize** and use on our customer portal:

<https://www.santanderbank.com/us/pages/corporate/commercial-card-resource-center>



### User Guides

- Program Administrator Guide ↗
- Who To Call For What Quick Reference Graphic ↗
- Cardholder FAQs ↗
- Dispute Procedures ↗
- Virtual Card for Account Payable Guide ↗
- Virtual Card for Account Payable File Upload Guide ↗
- Card Travel Programs Guide ↗



### Forms and Templates

- Program Administrator Request Form ↗
- Cardholder Name Change Request Form ↗
- Merchant Category Codes and Strategies Template ↗
- Virtual Card Batch File Template ↗
- AP File Optimization Template ↗



### Resources

- Fraud Fact Sheet ↗
- Sample Email Messages To Cardholders ↗
- Decline Codes and Reasons ↗
- Understanding Merchant Category Codes (MCCs) and Strategies ↗
- Commercial Cardholder Agreement ↗



### Benefits

- Mastercard Guide to Benefits ↗
- Mastercard Liability Protection Program ↗
- Mastercard Worldwide Automatic Travel Accident & Baggage Delay ↗

Click on the link and then open the Word document:

The screenshot shows the 'Resources' section of the Santander Commercial Card Resource Center website. The 'Resources' section is highlighted with a red circle. Below it, a list of resources is shown, including 'Sample Email Messages To Cardholders'. A red circle highlights the 'Sample Email Me...docx' link in the download bar at the bottom of the page. The download bar shows the file name 'Sample Email Me...docx' and the size '30.8/30.8 KB'. The website footer includes navigation links for 'Home' and 'Terms of Use', and an 'About' section with links for 'About Us', 'Media Center', 'Shareholder Relations', and 'Community'. A disclaimer at the bottom states: 'Equal Housing Lender Santander Bank, N.A. is a Member FDIC and a v rights reserved. Santander, Santander Bank and the Flame Logo are trad countries. All other trademarks are the property of their respective owne'.

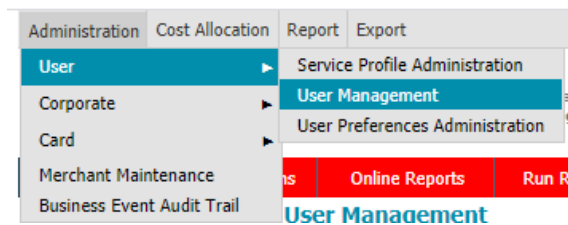
**Note 1:** If the 'From Address' is set to 'Default', it will display '360Control@firstdata.com' as the 'from' address on the e-mail. If the 'My Email' option is selected, it will display the Program Admin's own e-mail address as the 'from' address on the e-mail. This is for display purposes only, and all e-mails actually come from the First Data / Fiserv server.

**Note 2:** If the 'Yes' option is selected for 'Shared', then this e-mail template will be available to all Program Admins to send. If the 'No' option is selected, then only the Program Admin who is actually creating this template will be allowed to send it. Please see section below if a shared template is required.

Click **Save**.

### 3. Sending an Email

Once the E-Mail Template has been created, it will be available to send to Cardholders on the User Management screen. Navigate to Administration > User > User Management.



Filter for the Cardholders that the e-mail should be sent to. Please note that the e-mail will be sent to ALL Cardholders on the screen. It is not possible to select individual cardholders to send the e-mail to.

Once all the relevant Cardholders are on the screen, click on the 'Email' button

[E-Statements](#)
[Transactions](#)
[Online Reports](#)
[Run Reports](#)
[Download/View Reports](#)
[Run Export](#)

**Administration : User : User Management**

First Name:  Last Name:  User Status: Active

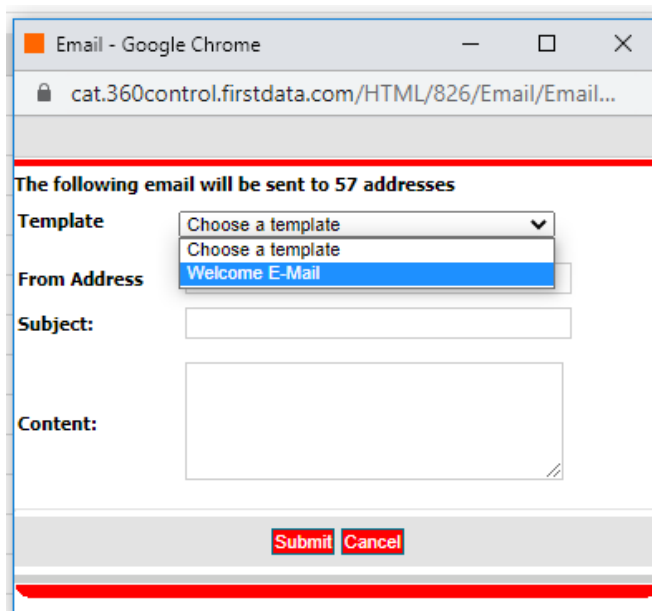
Profile: ALL  Card Number:  Approver Type:  View:

User Name	User Login	Employee ID	Viewpoint	Card
ARUVI P TEST	testar1		Card Only	<input type="checkbox"/> *****501
TEJU TEST	teste155		Card Only	<input type="checkbox"/> *****688
YYYY TEST	testyy1		Card Only	<input type="checkbox"/> *****706
RAMYA Q TEST	testra199		Card Only	<input type="checkbox"/> *****715
RAM D TEST	testra202		Card Only	<input type="checkbox"/> *****719
HNFVFS H GDCH	gdchh		Card Only	<input type="checkbox"/> *****728
FGGG TEST	testfg2		Card Only	<input type="checkbox"/> *****730
FCSHG N GHBMMCS	ghbmmcsf		Card Only	<input type="checkbox"/> *****731
DSD TESTMDSDS	testmddsds1		Card Only	<input type="checkbox"/> *****733
ABC YYZ	yyza		Card Only	<input type="checkbox"/> *****735
XYZZ ABC	abcoy1		Card Only	<input type="checkbox"/> *****737
MJHCJD J VCBN	vcbnm		Card Only	<input type="checkbox"/> *****745
RAHUKJHVJHV TEST	testra211		Card Only	<input type="checkbox"/> *****750
REG Y TEST	testre6		Card Only	<input type="checkbox"/> *****758
MNN K GFBN	gfbnm		Card Only	<input type="checkbox"/> *****762
RERE RERER	rererr		Card Only	<input type="checkbox"/> *****767

< Previous 1-16 of 165 Next >

[Select All Users](#)
[Add/Edit/View](#)
[User Security](#)
[Hierarchy](#)
[Edit Profile](#)
[Email Template Groups](#)
[Email](#)
[Output File](#)

In the E-Mail pop-up box, select the 'Welcome E-Mail' from the Template dropdown menu.

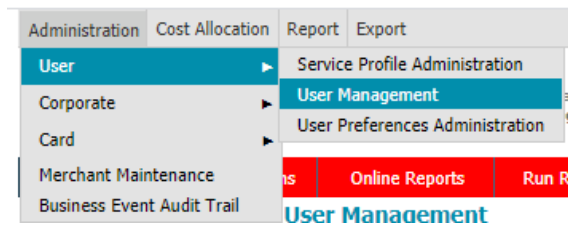




The E-Mail Template will be displayed and an alternate 'From' address can be entered is required.

#### 4. Creating Shared E-Mail Templates (For Companies with Multiple PAs)

Navigate to Administration > User > User Management



Select any Program Administrators on the screen who should have access to send the Welcome E-Mail.

Click on the 'Email Template Groups' > Add Selected Users.

[E-Statements](#) | [Transactions](#) | [Online Reports](#) | [Run Reports](#) | [Download/View Reports](#) | [Run Expo](#)

### Administration : User : User Management

First Name:  Last Name:  User Status: Active

Profile: ALL Card Number:  Approver Type:  [View](#)

User Name	User Login	Employee ID	Viewpoint	Card
RAHUL@HH TEST	testra66	251111111111	EPUB TESTING CONS	<input type="checkbox"/> *****49
RAHUL TEST	testra226	333333333333	Card Only	<input type="checkbox"/> *****79
firstname lastname	lastname24236		EPUB TESTING CONS	<input checked="" type="checkbox"/>
Testcat Me	testcatme		EPUB TESTING CONS	<input checked="" type="checkbox"/>
STATEMENT15 TEST	testst16	222222222222	Card Only	<input type="checkbox"/> *****89
PAPERSTATEMENT TEST	testpa18	666666666666	Card Only	<input type="checkbox"/> *****89
CARD1 TEST	testca55		Card Only	<input type="checkbox"/> *****90
ARUVI P TEST	testar1		Card Only	<input type="checkbox"/> *****50
SUB 1 TEST	testsu16		Card Only	<input type="checkbox"/> *****11
JOHN1 M DOE1	doe1jo4		Card Only	<input type="checkbox"/> *****84
TEST TEST2TEST	test2testt		Card Only	<input type="checkbox"/> *****84
YETTI TESTNAME	testnamey	10924324	Card Only	<input type="checkbox"/> *****80
STATEMENT T SANTANDER	santanders		Card Only	<input type="checkbox"/> *****90
USER2151 TEST	testus62		Card Only	<input type="checkbox"/> *****91
CARD2625 TEST	testca271		Card Only	<input type="checkbox"/> *****91
KAIL M TEST	testk		Card Only	<input type="checkbox"/> *****90

[Add/Edit Group](#) | [Add Selected Users](#)

[Select All Users](#) | [Add/Edit/View](#) | [User Security](#) | [Hierarchy](#) | [Edit Profile](#) | [Email Template Groups](#) | [Email](#) | [Output F...](#)

Select the 'Admins' Group and click the 'Add' button.

Email Template Groups - Google Chrome

cat.360control.firstdata.com/dcal/UserAdministrationServlet?action=viewEmailGroups&userIds=28...

Email Template Groups: Admins [Edit Name](#) [Delete](#) [Add New](#)

**Group Users**  
 lastname14368      firstname      lastname

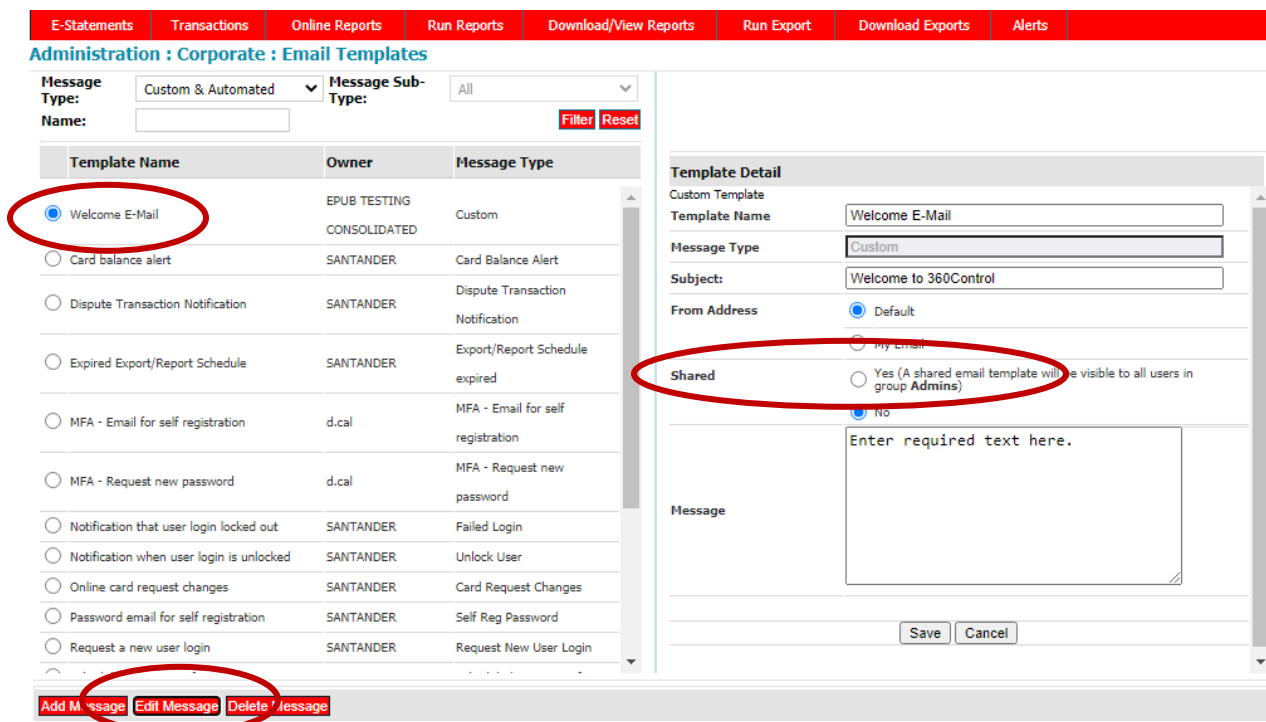
Pending users to be added: 1 [Add](#) [Remove Selected](#)

[Close](#)

Once all the Program Admins (including yourself) have been added to the Group, return to Administration > Corporate > E-Mail Templates screen.

Select the 'Welcome E-Mail' that you previously created and click on the 'Edit Message' button.

On the right-hand side, select 'Yes' for the Shared option and save your changes. This e-mail template will now be available to all Program Administrators in the group.



**Administration : Corporate : Email Templates**

Message Type: Custom & Automated Message Sub-Type: All

Name:  Filter Reset

Template Name	Owner	Message Type
<input checked="" type="radio"/> Welcome E-Mail	EPUB TESTING CONSOLIDATED	Custom
<input type="radio"/> Card balance alert	SANTANDER	Card Balance Alert
<input type="radio"/> Dispute Transaction Notification	SANTANDER	Dispute Transaction Notification
<input type="radio"/> Expired Export/Report Schedule	SANTANDER	Export/Report Schedule expired
<input type="radio"/> MFA - Email for self registration	d.cal	MFA - Email for self registration
<input type="radio"/> MFA - Request new password	d.cal	MFA - Request new password
<input type="radio"/> Notification that user login locked out	SANTANDER	Failed Login
<input type="radio"/> Notification when user login is unlocked	SANTANDER	Unlock User
<input type="radio"/> Online card request changes	SANTANDER	Card Request Changes
<input type="radio"/> Password email for self registration	SANTANDER	Self Reg Password
<input type="radio"/> Request a new user login	SANTANDER	Request New User Login

**Template Detail**

Custom Template

Template Name:

Message Type:

Subject:

From Address:  Default  My Email

Shared:  Yes (A shared email template will be visible to all users in group Admins)  No

Message:

Save Cancel

Add Message Edit Message Delete Message