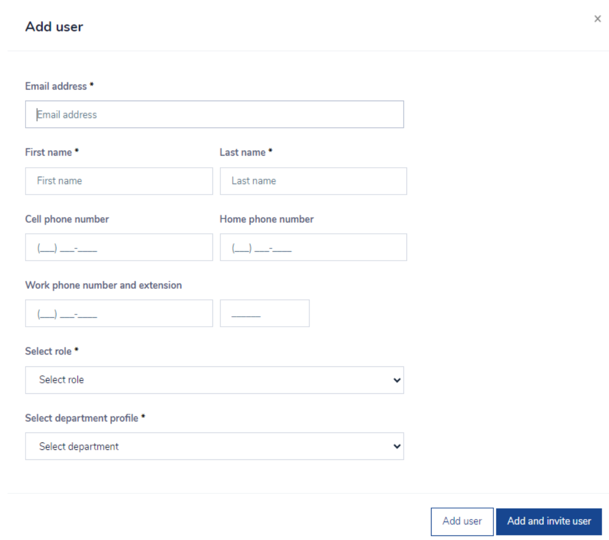
Create a New User

Administrators have the ability to create new users, which is the first step in ordering a new card.

From the navigation pane, select **Users → Add user**.

1. Enter the **Email address**
2. Enter **first and last name**
3. The **cell and home phone numbers** are not required fields, but will be needed for the cardholder to receive text messages concerning possible fraud or to confirm transactions
4. Select the **role** the user should have, either Program Administrator, Reporting Administrator, or User
5. Select the **department** profile, which includes the accounts this user should have access to
6. Click **Add and invite user**. This will generate an email to the user so that they are able to complete the enrollment process

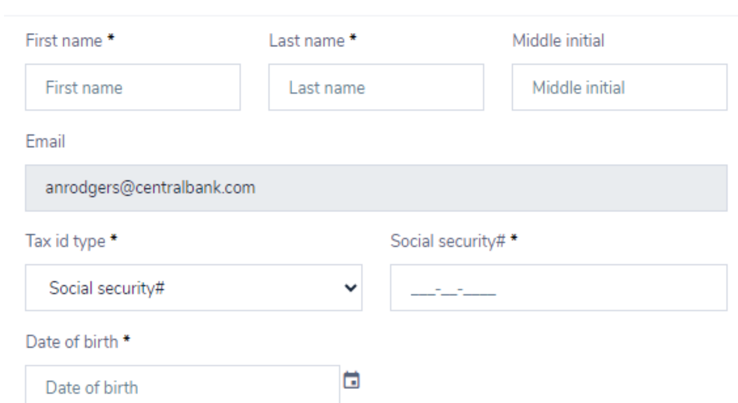


Note: If <u>only</u> ordering a card without granting access to SpendTrack, only select **Add user** so that an email *will not be generated* to the cardholder.

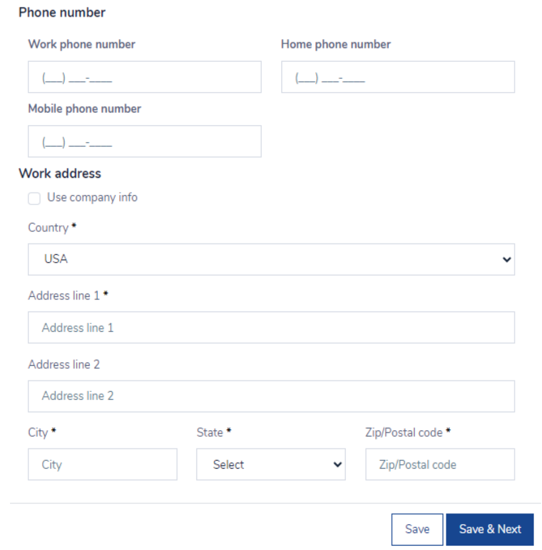
Add New Card

After the user is created:

1. From the list of users, click on the user name, and select **Manage cards**
2. Select **Apply for credit card**
3. Enter the **name**, **email**, **tax ID (Business EIN)**, and **date of birth**
4. Select Submit on the New card Application window
5. Click **Save & Next**



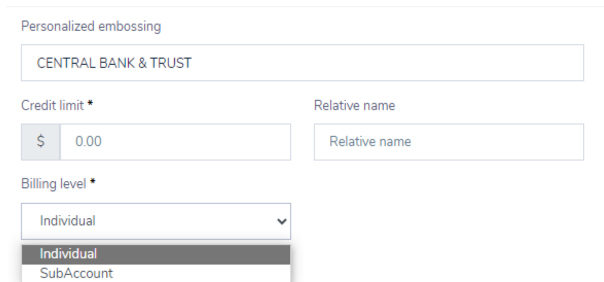
6. Next, enter **contact information**. This includes the business mailing/billing address and work number, and mobile number for fraud alerts and notifications
7. Click **Save and Next**
8. Next is the Personalized embossing area. This is where you will establish an individual credit limit, as well as the billing level.



Billing Levels:
<u>Individual</u>: This indicates this cardholder should be billed through individual billing.

<u>SubAccount</u>: This ensures that the cardholder should be billed through corporate billing. This is the most common billing level used.

Please contact Corporate Services at 859-253-8743 with any questions regarding this selection.



9. After selecting the Billing level, Click **Save & Next**
10. Click the **View terms and conditions box**, and select that you have read and **agreed** to the terms and conditions.
11. Select **Submit**

Note: Submitting this form begins the card creation process. After the card is created it can be seen on the Homepage.