

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

The screenshot shows a web form titled "Add user" with a close button (x) in the top right corner. The form contains the following fields and controls:

- Email address ***: A text input field with a placeholder "Email address".
- First name ***: A text input field with a placeholder "First name".
- Last name ***: A text input field with a placeholder "Last name".
- Cell phone number**: A text input field with a placeholder "() - - -".
- Home phone number**: A text input field with a placeholder "() - - -".
- Work phone number and extension**: A text input field with a placeholder "() - - -" followed by a separate input field for the extension.
- Select role ***: A dropdown menu with "Select role" as the selected option.
- Select department profile ***: A dropdown menu with "Select department" as the selected option.

At the bottom right of the form, there are two buttons: "Add user" (a light blue button) and "Add and invite user" (a dark blue button).

Note: If only 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**

The screenshot shows a web form for adding a new card. The form contains the following fields and controls:

- First name ***: A text input field with a placeholder "First name".
- Last name ***: A text input field with a placeholder "Last name".
- Middle initial**: A text input field with a placeholder "Middle initial".
- Email**: A text input field with the value "anrodgers@centralbank.com".
- Tax id type ***: A dropdown menu with "Social security#" as the selected option.
- Social security# ***: A text input field with a placeholder "____-____-____".
- Date of birth ***: A text input field with a placeholder "Date of birth" and a calendar icon.

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.

Phone number

Work phone number

Home phone number

Mobile phone number

Work address

Use company info

Country *

Address line 1 *

Address line 2

City * State * Zip/Postal code *

Billing Levels:

Individual: This indicates this cardholder should be billed through individual billing.

SubAccount: 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.

Personalized embossing

Credit limit * Relative name

Billing level *

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.