



SpendTrack

Program Administrator User Guide

August 2026

Contents

1. **Overview**
 - a. What is SpendTrack for PAs?
2. **Program Administrator features overview**
 - a. PA features
3. **Register as a program administrator**
 - a. Enter program administrator details
 - b. Complete the PA registration
4. **Reset password**
5. **Unlock a cardholder account**
6. **Unlock a noncardholder account**
7. **Navigate the SpendTrack home page**
 - a. Left navigation menu
 - b. Company and account records
 - c. Summary
 - d. Payment information
 - e. Latest transactions
 - f. View statements
 - g. Cardholders
8. **Program administrator tasks**
 - a. Manage cardholder cards
 - b. Update merchant category groups
 - c. Manage user/cardholder profile
 - d. View cardholder transactions
9. **Enable paperless statements**
10. **Make cardholder payments**
 - a. Make a one-time payment
 - b. Make an autopay payment
11. **View payment activities**
12. **Add or manage a payment account**
13. **Reassign cards**
 - a. Undo a reassignment
14. **View and redeem uChoose Rewards**
15. **Analytics**
 - a. Spending trends
 - b. Top seven merchants by spending category
 - c. Spending by merchant category groups
16. **Navigate notifications**

17. Department head features

- a. Create a department
- b. Edit a department
- c. View department spend analytics

18. Users

- a. Manage users
- b. Create a new user
- c. Add a card
- d. Add subaccounts

19. Manage company access

20. Audit logs and settings

21. Settings navigation

- a. Change password

Revision history

Date	Description
August 2026	Uplifted to current standards.

Overview

What is SpendTrack for PAs? At a glance

The SpendTrack™ application enables Program Administrators (PAs) to view, update, and manage business accounts.

Program Administrator features overview

At a glance

Manage your card program and company users from one place. Add and manage users, control card settings, manage virtual cards and departments, and access tools such as analytics, audit logs, notifications, and company settings.

PA features

SpendTrack PAs have access to the following features:

Role management

- Add program administrator
- Add reporting administrator
- Add user
- Edit program administrator
- Edit reporting administrator
- Edit user
- Disable and remove program administrator
- Disable and remove reporting administrator
- Disable and remove user

Card management

- Activate card
- Lock card / Unlock card
- Reset Personal Identification Number (PIN)
- Replace card
- Report lost or stolen
- Travel plans
- View statements

- Download statements
- Bulk company statements
- Paperless
- Close card
- Update merchant category groups
- Update credit limit and temporary credit limit
- View transactions
- Download transactions
- Connect to QuickBooks
- View rewards
- Redeem rewards
- New card application
- Reassign card
- Make a payment
- Autopay
- Add payment account
- Manage payment account

User management

- Self-registration
- Invite user
- Update personal information
- Update contact information
- Manage company access
- Reset password
- Self-unlock
- Disable user
- Remove user

Virtual card

- Create a Virtual card for themselves
- Create Virtual card for others
- Update Virtual card for themselves
- Update Virtual card for others
- Lock/Unlock Virtual card
- Approve and decline Virtual card
- View Virtual card transaction
- Close Virtual card

Department

- Add department
- Edit department
- Delete department
- Assign department head
- Change department head
- Add subdepartment
- Edit subdepartment
- Delete subdepartment
- Assign subdepartment head
- Change subdepartment head

Miscellaneous

- Notifications
- Analytics
- Audit logs
- Company settings
- Share your feedback

Register as a program administrator

At a glance

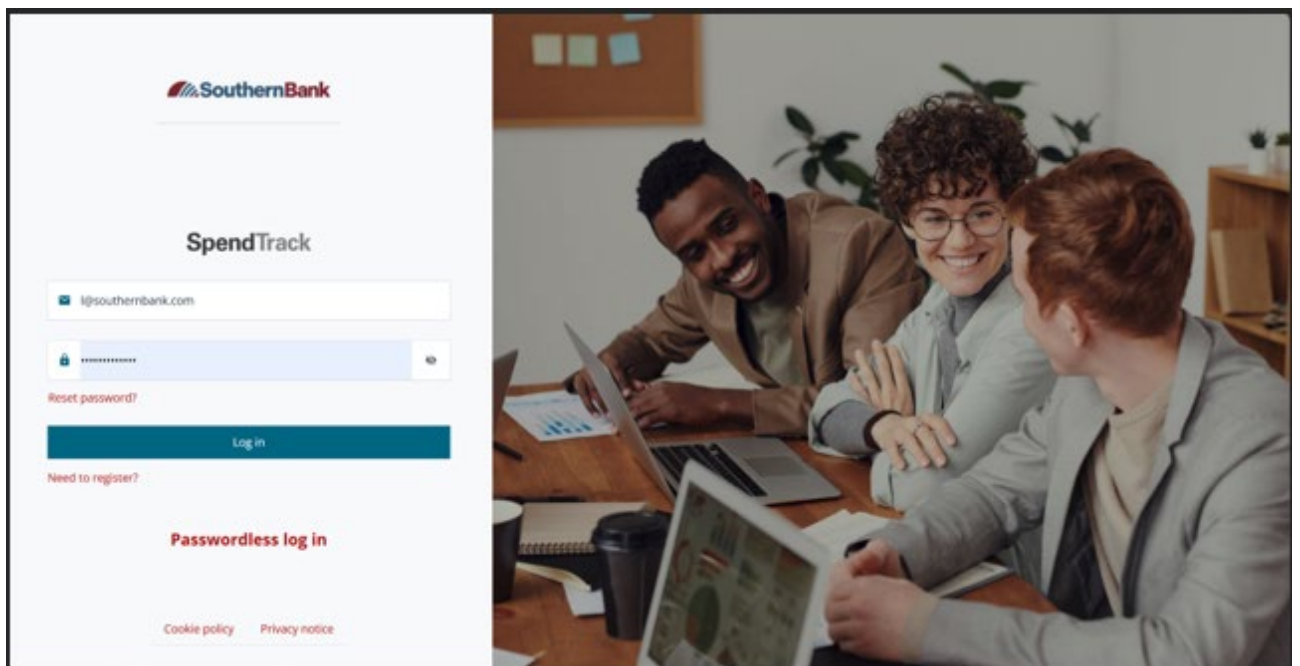
Self-register as a program administrator to gain full access to your company's SpendTrack features. Each company must maintain at least one PA and designate a primary PA.

Register as a PA

Prospective users within the company can onboard themselves through self-registration. Program administrators have full access to the company's features within SpendTrack. Each company must designate at least one PA and assign a primary P.

To register to be a program administrator, prospective PAs start the journey pointing their browser to their SpendTrack sign in link located on Southern Bank's website www.southernbank.com and navigating to the Spendtrack registration page.

1. Navigate to the SpendTrack sign in page.



2. Select **Need to Register?**
3. Select **Register as a program administrator**. The Program Administrator Details form appears.



Registration

What would you like to do?

☐ **Register as a program administrator**
As a program administrator, you'll need the following information to get started:

- ☐ Company EIN/Tax ID
- ☐ Primary company contact phone
- ☐ Account/Card number

☐ **Register my card**
Before you get started, make sure to have your card within easy reach.

[Cancel](#) [Continue](#)



Enter program administrator details

1. Enter your **first name**, **last name**, **email address**, and **mobile phone number** in the corresponding fields.

SpendTrack validates email against credit card accounts or cards used for self-registration.



Program administrator registration

Program administrator details

First name * Last name *

Mobile phone number *

Email address *
[Change email address?](#)

Company details

Company EIN/Tax ID *

Primary company phone number *

Account/Card number *

[Cancel](#) [Register](#)

[Cookie policy](#) [Privacy notice](#)



Having Trouble? Call Southern Bank Customer Care: 1-855-275-7226.

2. Enter your company's **EIN/Tax ID**, **primary company phone number**, and **account/card number**.

3. Select **Register**. The system sends a request to the primary program administrator of your company. In the absence of a PA in the company, the registration goes to the Southern Bank administrator. After the primary PA or the Southern Bank admin approves the request, the PA receives a Welcome email with an activation link and activation code.



Important! If the PA candidate enters any company details that do not match information stored in the back-end account system, the registration stops and an error message appears. Call Southern Bank Customer Care: 1-855-275-7226

Complete the PA registration

After the administrator approves your PA registration request, you receive a Welcome email with an activation link and activation code.

Dear Business Customer,

Welcome to SpendTrack, provided by SOUTHERN BANK. You recently received an email from SOUTHERN BANK notifying you of a change to your credit card online account access. SOUTHERN BANK Institution Administrator is informing you about the steps necessary to access SpendTrack.

What is SpendTrack?

SpendTrack is a new, improved online credit card management solution that allows businesses to easily manage credit card accounts online and provides real-time card controls, transaction details, statement access, payment capabilities, and spend analytics. SpendTrack replaces your current online card management solution.

To access your business credit card account online with SpendTrack, please follow the instructions below to set up your account.

How to Set Up Your SpendTrack Account:

1. To access and set up your SpendTrack account, click the activation link:
<https://spendtrack-stage.fservapp.com/southern-bank-trust-co/activate?p=1>
2. Enter the following **Activation Code** in the required field:
09a1c76d-482e-41b5-9a98-8c8af2a6e5a3
(This activation code will expire in 2 days.)

How to Access Your Account

Once your SpendTrack account has been set up, please use the following new URL to log into your account: <https://spendtrack-stage.fservapp.com/southern-bank-trust-co/>. Consider adding this URL to your favorite bookmarks for future use.

- Enter your email address
- Enter your password
- Check your email for your one-time passcode
- Enter the one-time passcode in the required field

1. Select the activation link to display the SpendTrack site.
2. In the Activate Account section, paste the activation code from the email into the **Activation Code field**. Once you paste the code you will need to remove the space on the end or you will get an error message.

SouthernBank

SpendTrack

Activate Account

Enter the activation code from the activation email here

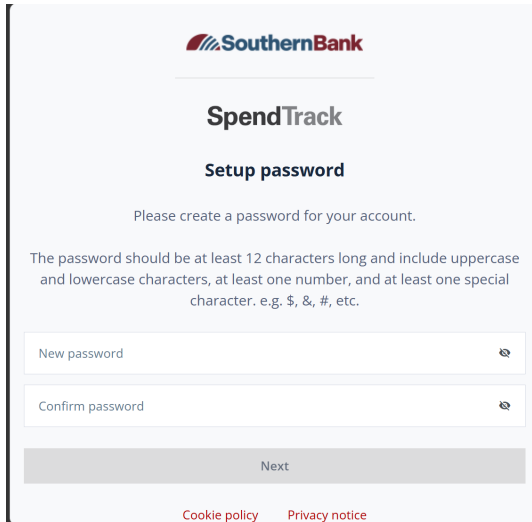
Activation code

Activate

[Cookie policy](#) [Privacy notice](#)



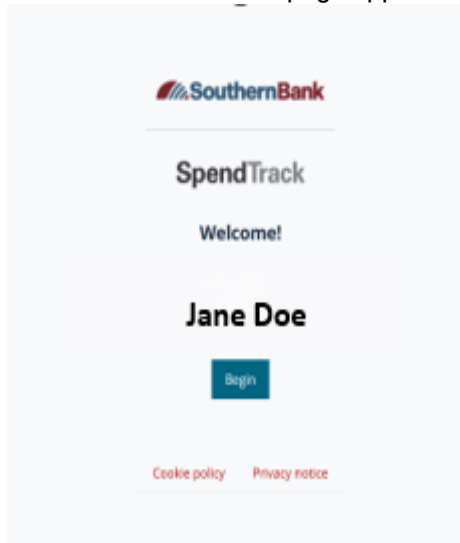
3. Select **Activate**. The system sends a one-time passcode (OTP) to your email and displays the one-time passcode page.
4. Copy the OTP from the email and paste it into the OTP field.
5. Select **Next**. The Setup password page appears.



The screenshot shows the SouthernBank SpendTrack 'Setup password' page. At the top is the SouthernBank logo. Below it, the text 'SpendTrack' and 'Setup password' are displayed. A message says 'Please create a password for your account.' followed by password requirements: 'The password should be at least 12 characters long and include uppercase and lowercase characters, at least one number, and at least one special character. e.g. \$, &, #, etc.' There are two input fields: 'New password' and 'Confirm password', each with a password icon on the right. Below the fields is a 'Next' button. At the bottom are links for 'Cookie policy' and 'Privacy notice'.



6. Enter your new password in the **New password** field.
7. Confirm your new password by reentering it in the **Confirm password** field.
8. Select **Next**. A Welcome page appears.



The screenshot shows the SouthernBank SpendTrack 'Welcome!' page. At the top is the SouthernBank logo. Below it, the text 'SpendTrack' and 'Welcome!' are displayed. The name 'Jane Doe' is shown in a large font. Below the name is a blue 'Begin' button. At the bottom are links for 'Cookie policy' and 'Privacy notice'.



9. Select **Begin**. The SpendTrack PA dashboard appears.

Good day, Alex!
Here is what's happening with your accounts and cardholders

Select company: Company 13 | Billing account: West coast

Company 13 (West coast) [View statements](#)

Balance | Breakdown by category

Current balance: **\$ 1,457.72**

Available credit: **\$ 8,542.00** | Credit limit: **\$ 10,000**

uChoose rewards
5000 [View](#)

Note: If you'd like to modify your company's credit limit, contact your financial institution's admin.

Payment information | [View payment activities](#)

⚠ Your payment is past due - make a payment today to bring your account current.

Last statement balance: **\$ 1,457.72** | Minimum payment due: **\$ 1,234.00**

Payment due date: **Dec 18, 2024** | Past due amount: **\$ 1,204.00**

[Make a payment](#) | [Set up autopay](#) | [Add payment account](#)

[Manage payment accounts](#)

Latest transactions | [View all transactions](#)

Any travel	Nov 15, 2024	\$ 537.00	Posted
Any restaurants	Nov 15, 2024	\$ 40.00	Posted
Any coffee shop	Nov 15, 2024	\$ 20.00	Posted
Any apparel	Nov 15, 2024	\$ 5.00	Posted
Any merchant	Nov 15, 2024	\$ 5.00	Posted

As an approved program administrator, you now have the admin rights to approve other prospective PA requests.

Reset password

At a glance

Reset your SpendTrack password by requesting a secure reset link, completing the required identity verification, and creating a new password. The verification method depends on whether your SpendTrack profile is associated with a card profile.

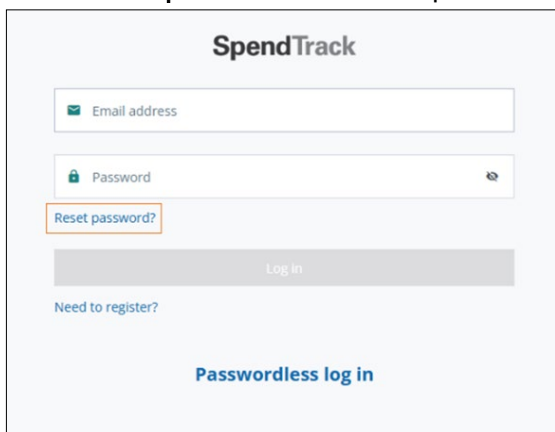
Prerequisites

- Access to the email account associated with your SpendTrack user profile
- Access to card details (if your SpendTrack profile is associated with a card profile)

Reset password

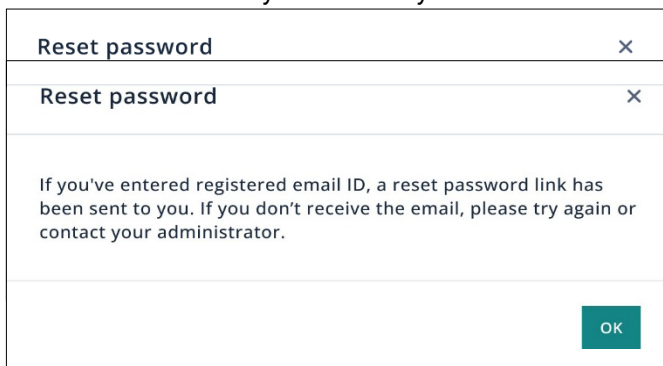
SpendTrack cardholder users can reset their own passwords.

1. Enter your email address.
2. Select **Reset password?** The Reset password dialog box appears.



The image shows the SpendTrack login interface. It features a light blue header with the 'SpendTrack' logo. Below the header are two input fields: 'Email address' with an envelope icon and 'Password' with a lock icon and a toggle eye icon. A button labeled 'Reset password?' is highlighted with an orange border. Below this is a grey 'Log in' button and a blue link 'Need to register?'. At the bottom, there is a blue link 'Passwordless log in'.

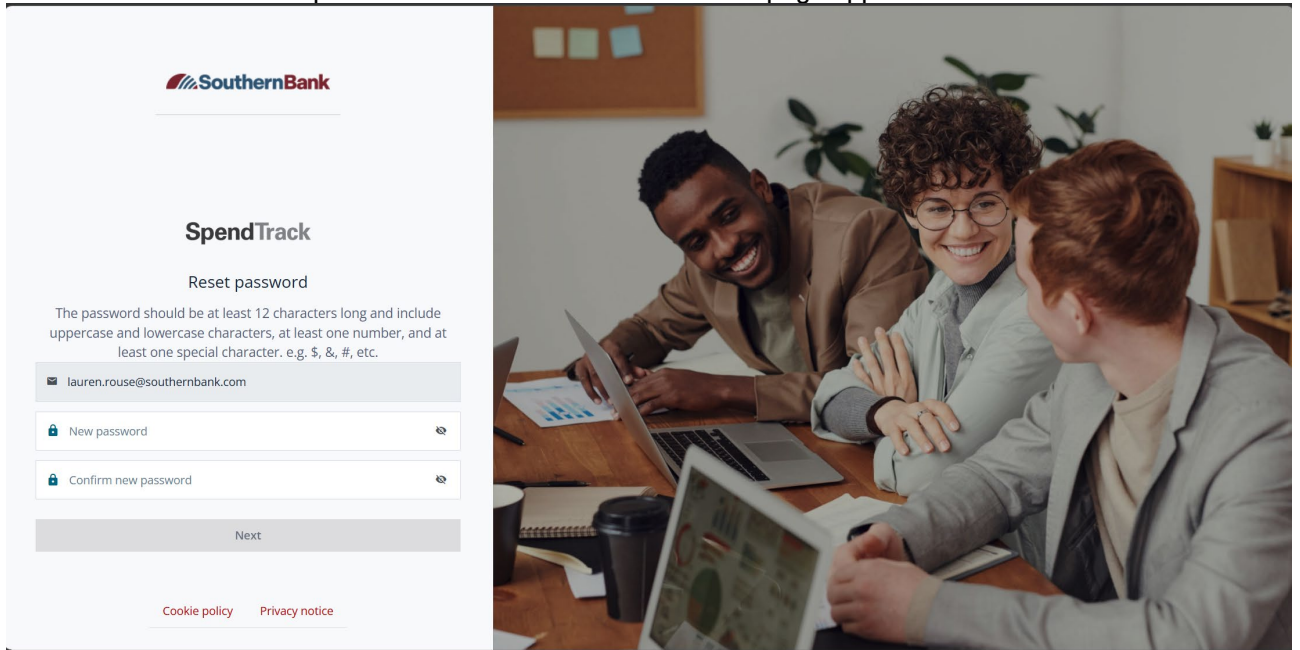
3. Select **Confirm**. The system sends you a secure link to reset your password.



The image shows a 'Reset password' dialog box. It has a title bar with 'Reset password' and a close button (X). The main content area contains the text: 'If you've entered registered email ID, a reset password link has been sent to you. If you don't receive the email, please try again or contact your administrator.' At the bottom right, there is a green 'OK' button.

4. Select **Ok**. Check for your email.

5. Proceed depending on the card profile associated with the SpendTrack user profile:
 - A user without a card profile in SpendTrack receives and enters the OTP.
 - A user with a card profile in SpendTrack receives the validation page and enters the card's last four digits and expiration date.
6. Select **Next**.
7. Create and confirm a new password. Select **Next**. A confirmation page appears.



The image shows a screenshot of the Southern Bank SpendTrack password reset page on the left and a photograph of three people (two men and one woman) smiling and working together at a desk with laptops on the right.

SouthernBank

SpendTrack

Reset password

The password should be at least 12 characters long and include uppercase and lowercase characters, at least one number, and at least one special character. e.g. \$, &, #, etc.

✉ lauren.rouse@southernbank.com

🔒 New password

🔒 Confirm new password

Next

[Cookie policy](#) [Privacy notice](#)

8. Select **Continue**. The cardholder dashboard appears.

Unlock a cardholder account

At a glance

Unlock a locked SpendTrack cardholder account by requesting a password reset link, validating your identity using card information, and creating a new password. Cardholders can complete this process themselves. Noncardholders must contact their SpendTrack PA for assistance.

Prerequisites

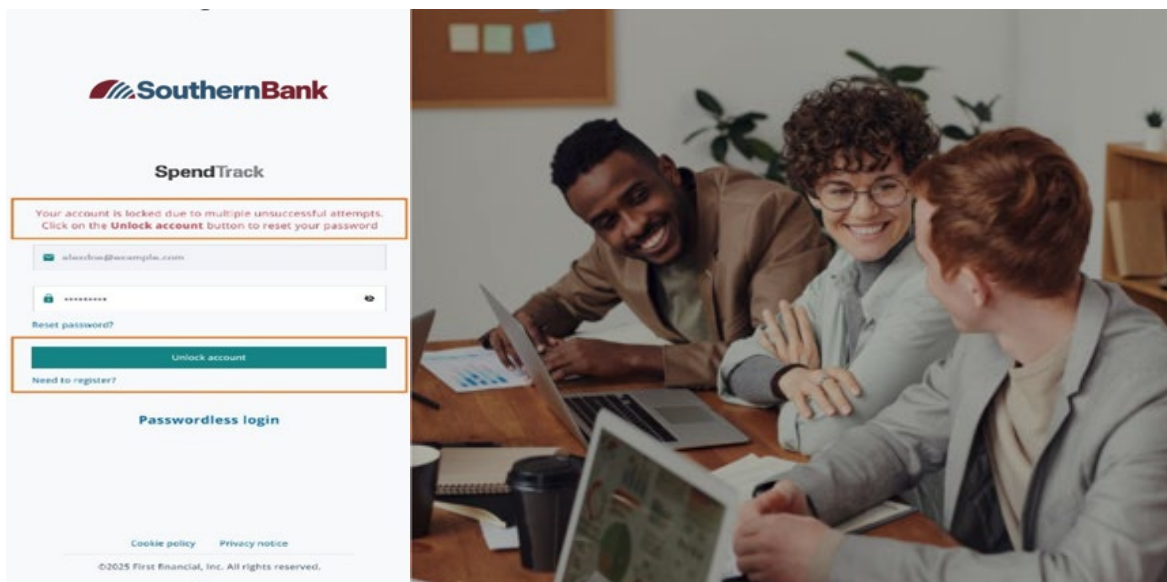
- Access to the email address associated with your SpendTrack account
- The last four digits of your card number and the card expiration date
- Access at least one valid card associated with your account if you hold multiple cards

Unlock a cardholder account

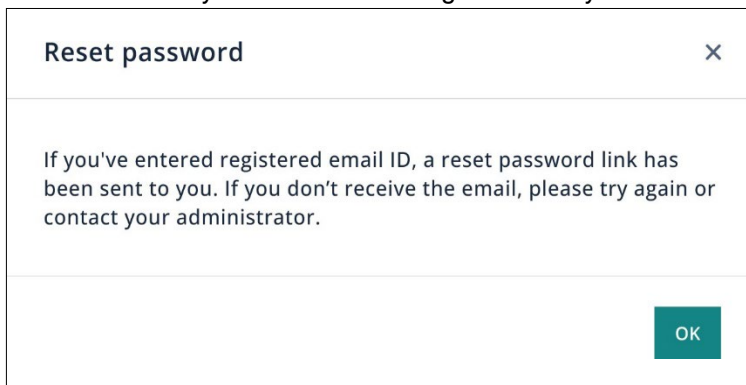
If you receive the message "Your account is locked due to multiple unsuccessful attempts. Click on the Unlock account button to reset your password." when you attempt to sign in, you need to unlock your account.

- If you are a cardholder, follow the steps in this procedure to unlock your SpendTrack™ account for yourself.
- If you are not a cardholder, ask your SpendTrack program administrator to unlock your account for you. For more information, see [Unlock a noncardholder account](#).

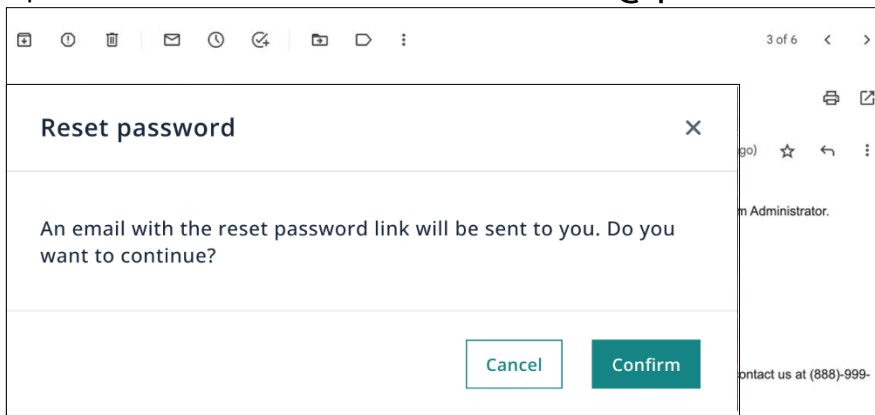
1. Select **Unlock account**.



2. Select **Confirm** when you receive the message "An email with the reset password link will be sent to you. Do you want to continue?"
3. Select **OK** when you receive a message that the system sent an email with a reset password link.



4. Open the Reset Password email sent from the **alerts@spendtrack** email address.



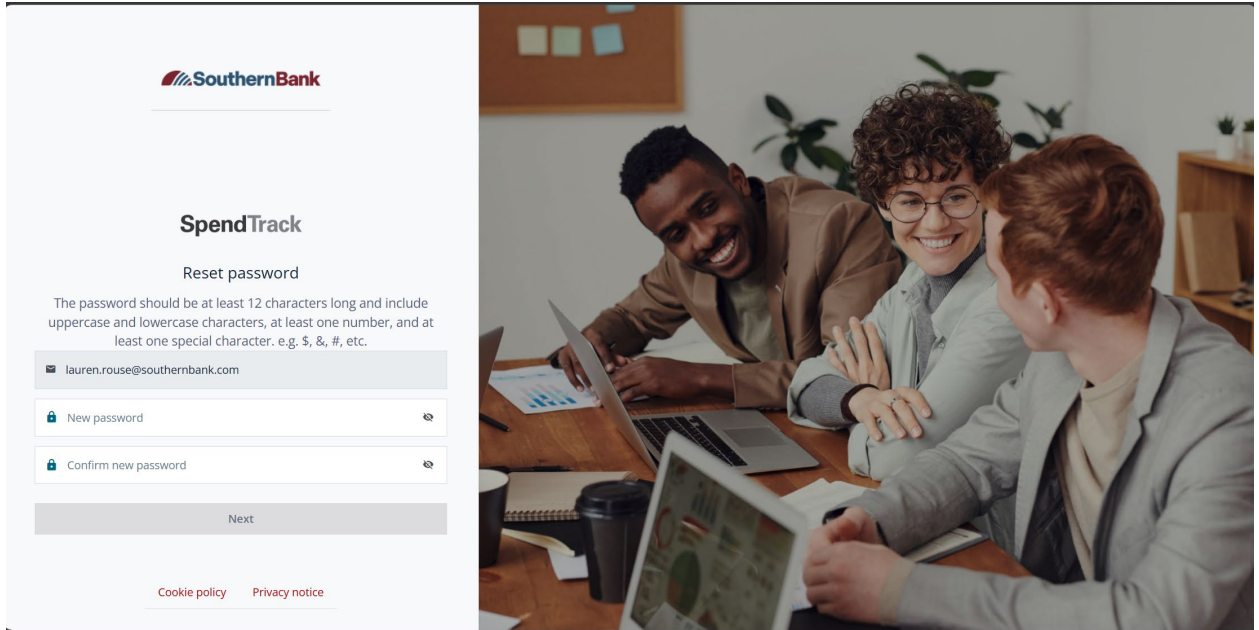
5. Select the link to open the Tell us more about yourself page.
6. Enter the last four digits of your card number and the card expiration date and then select **Next**.

A screenshot of the Southern Bank SpendTrack 'Tell us more about yourself' page. The page has the Southern Bank logo at the top. Below it, the text reads: 'Tell us more about yourself. This will help us know that this account belongs to you. If you have more than one card, use any card information.' There is a note: 'Please enter the correct information as provided.' Below this are two input fields: 'Last 4 digits of the card number' and 'Expiry date of the card (MM/YY)'. At the bottom, there is a 'Next' button. Links for 'Check policy' and 'Privacy notice' are also visible.

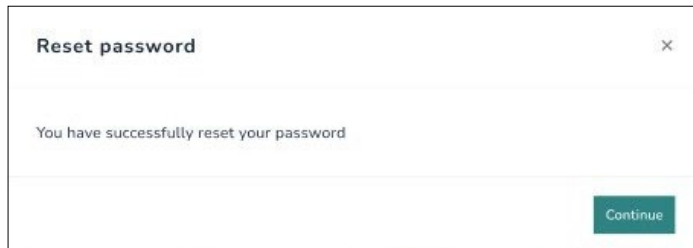


Note: If you hold multiple cards, you can enter information from any one of them to unlock your account. The only requirement is that the last four digits and expiration date must come from the same card.

7. Enter and confirm a new password on the Reset password page and then select **Next**.



The screenshot shows the Southern Bank SpendTrack 'Reset password' page. The page includes the Southern Bank logo, the 'SpendTrack' title, and a 'Reset password' heading. Below the heading, a message states: 'The password should be at least 12 characters long and include uppercase and lowercase characters, at least one number, and at least one special character. e.g. \$, &, #, etc.' The form contains an email field with 'lauren.rouse@southernbank.com', a 'New password' field, and a 'Confirm new password' field, each with a toggle icon. A 'Next' button is at the bottom. Links for 'Cookie policy' and 'Privacy notice' are at the very bottom. To the right of the form is a photo of three people (two men and one woman) smiling and looking at a laptop screen in an office setting.



The screenshot shows a 'Reset password' confirmation window. It has a title bar with 'Reset password' and a close button. The main text says 'You have successfully reset your password'. At the bottom right is a green 'Continue' button.

8. Select **Continue** on the Reset password confirmation page to open the cardholder dashboard.



Note: You also receive an email confirming the password reset.

Unlock a noncardholder account

At a glance

Unlock a locked SpendTrack noncardholder account by requesting a password reset link, accessing the reset email, and creating a new password. Noncardholders complete this process through a one-time password (OTP) verification.

Prerequisites

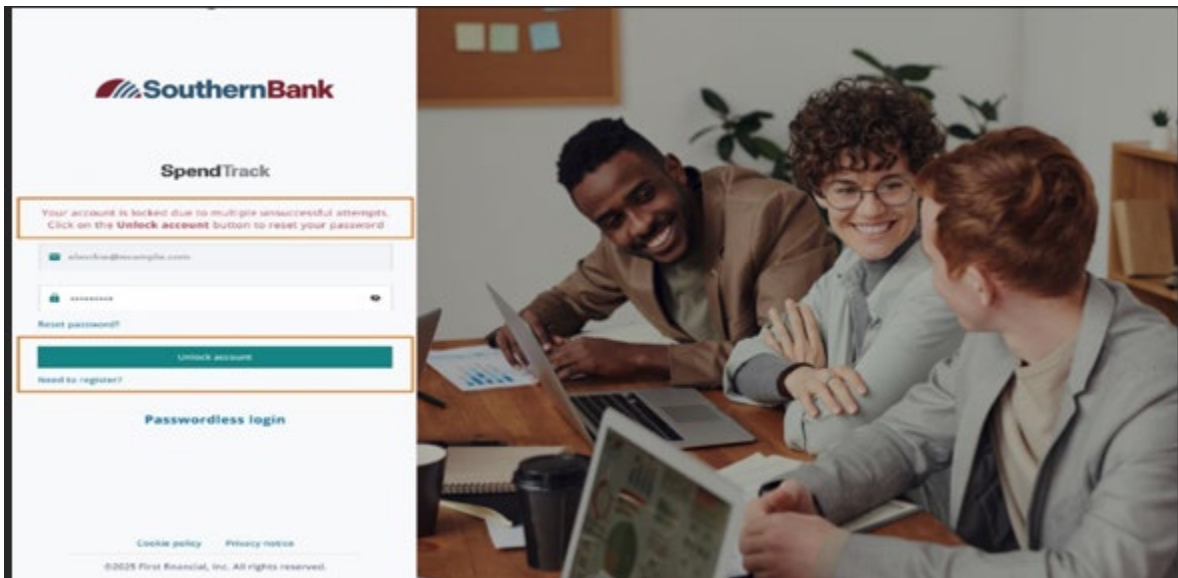
- Access to the email address associated with your SpendTrack account

Unlock a noncardholder account

If you receive the message, "Your account is locked due to multiple unsuccessful attempts." when you attempt to sign in, you need to unlock your account.

- If you are not a cardholder, ask your SpendTrack™ administrator to unlock your account for you. Follow the steps in this procedure.
- If you are a cardholder, follow the steps in this procedure to unlock your SpendTrack account for yourself. For more information, see [Unlock a cardholder account](#).

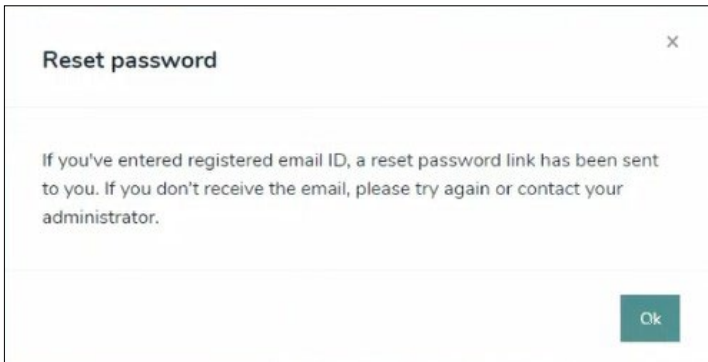
1. Select **Unlock account**.



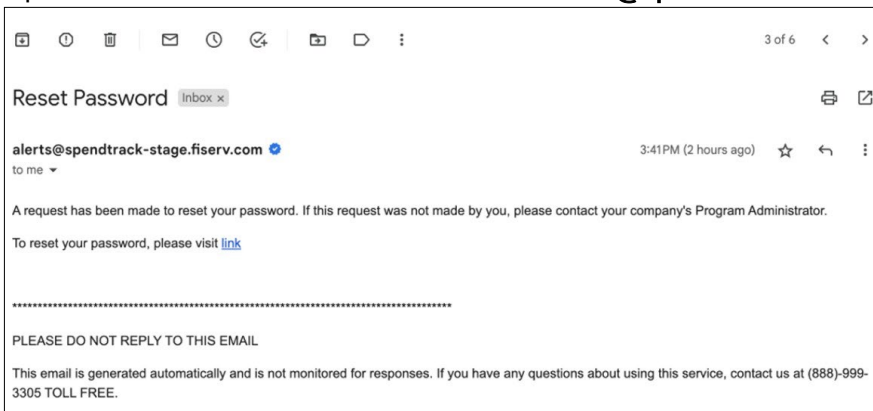
2. Select **Confirm** when you receive the message "An email with the reset password link will be sent to you. Do you want to continue?"



3. Select **OK** when you receive a message advising you that the system sent an email with a reset password link.



4. Open the Reset Password email sent from the **alerts@spendtrack** email address.



5. Select the link in the email to open the One Time Password page.



SpendTrack

One Time Passcode

A One Time Passcode (OTP) has been sent to your registered email address.

Please enter the OTP to proceed.

[Resend OTP](#)

Next

[Cookie policy](#) [Privacy notice](#)

6. Enter and confirm a new password on the Reset password page and then select **Next**.



SpendTrack

Reset password

The password should be at least 12 characters long and include uppercase and lowercase characters, at least one number, and at least one special character. e.g. \$, &, #, etc.

lauren.rouse@southernbank.com

Next

[Cookie policy](#) [Privacy notice](#)



7. Select **Continue** on the Reset password confirmation page to open the cardholder dashboard.

Reset password

You have successfully reset your password

[Continue](#)



Note: You also receive an email confirming the password reset.

Navigate the SpendTrack home page

At a glance

Access key account information from the SpendTrack home page. Monitor balances and payments, review recent transactions and statements, manage cardholders, and navigate to other areas of the application.

The information displayed depends on the company and billing account you select.

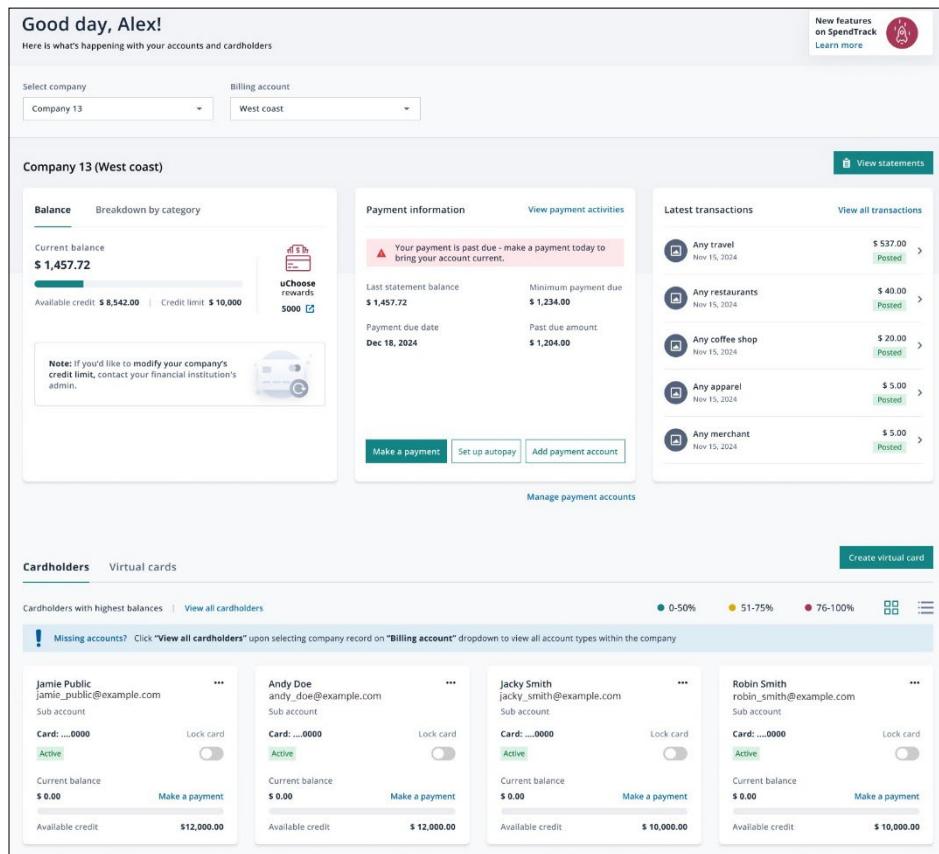
Prerequisites

- PA account access

Navigate the SpendTrack home page

When you sign in as a program administrator, the home page displays a summary of current information for your company and account.

- Use the left navigation menu to connect to other activity pages.
- View records of your full company account or of a selected billing account.
- Manage payments and transactions and take other actions to manage your selected billing account.
- View a snapshot of your payment activities and the five most recent transactions.
- View transactions broken down by category.
- View statements and documents through the link on the upper right section of the page.

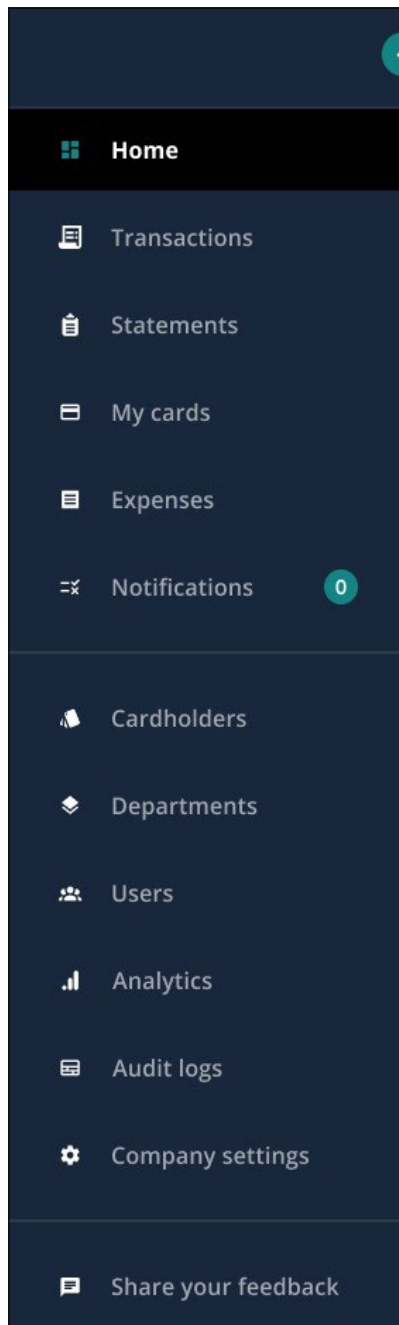


Left navigation menu

Connect directly to the features and information you need to manage your users and accounts through the left navigation menu.

Select the menu, such as **My cards**, to open the main page that supports that operation. When you select the menu, it remains highlighted as a marker of your current location within the application.

1. Select the **chevron**  at the top of the menu to expand or contract the display.
2. Select **More** to display any additional menus to the right of the main menu.



Company and account records

The values you choose in Select company and Billing account determine the range of information that is available to you in SpendTrack.

When you first sign in to SpendTrack, your company name appears in the Select company dropdown list. One of the billing accounts for your company appears in the Billing account dropdown list. Under this configuration, you can see and work with information for your selected billing account.

You can change the range of available information by selecting new values in the Select company and Billing account dropdown lists that appear above the summary pane.

Good day, Alex!

Here is what's happening with your accounts and cardholders

Select company

Billing account

Company 13

West coast

Select company

If you have access to multiple companies, you can select a company from the Select company dropdown list.

When you select a new company, the Billing account dropdown list includes only those accounts assigned to your selected company.

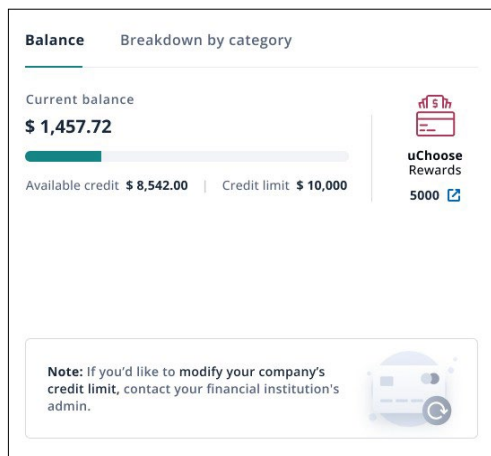
Billing account

If your selected company maintains more than one billing account, you can select an account from the Billing account dropdown list. This list contains the control accounts available within your selected company. If there are no control accounts, the list displays the company record. The value that you select in the Billing account dropdown list determines the information that appears elsewhere on the home page and throughout your SpendTrack session.

Summary

The Summary pane displays the most current consolidated balance and payment information for your selected billing account.

The Breakdown by Category tab displays the Spending breakdown chart for your selected billing account. It provides a quick overview of current spending by merchant category group.



Payment information

The Payment information pane displays payment activities. View payment activities made on your selected billing account.

Follow additional links in this pane to:

- Make a payment—Create a one-time or recurring payment on your selected billing account.
- Set up autopay—Create a recurring autopay payment schedule for your selected billing account.
- Add payment account—Create new records for checking and savings accounts to serve as the source for card payments.

Payment information

[View payment activities](#)

Your payment is past due - make a payment today to bring your account current.

Last statement balance

\$ 1,457.72

Minimum payment due

\$ 1,234.00

Payment due date

Dec 18, 2024

Past due amount

\$ 1,204.00

Make a payment

Set up autopay

Add payment account

Latest transactions

The five most recent payment and charge transactions affecting the billing account or company master account that you select in the Billing account dropdown list appear in the Latest Transactions pane.

When you select the chevron icon  on a transaction entry, you move to the Transactions details page where you can view the selected transactions in detail.

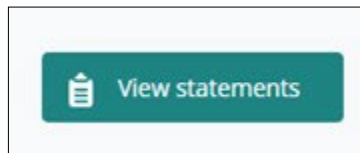
Latest transactions		View all transactions
	Any travel Nov 15, 2024	\$ 537.00 Posted >
	Any restaurants Nov 15, 2024	\$ 40.00 Posted >
	Any coffee shop Nov 15, 2024	\$ 20.00 Posted >
	Any apparel Nov 15, 2024	\$ 5.00 Posted >
	Any merchant Nov 15, 2024	\$ 5.00 Posted >

You can also connect directly to the Transactions page from the View all transactions link. Use this shortcut to view all transactions for the billing or company master account that you select from the Billing account dropdown list.

All transactions							
Search by cardholder, merchant or amount				<button>Filter</button>	<button>Export</button>		
Merchant	Transaction date	Posted date	Cardholder	Card	Status	File a dispute	Amount
Any travel Airlines	Nov 10, 2024	Nov 10, 2024	Taylor Smith	...0000	Posted		\$ 537.00 View
Any restaurants Hotels and motels	Nov 09, 2024	Nov 09, 2024	Pat Public	...0000	Posted		\$ 40.00 View
Any coffee shop Hotels and motels	Nov 09, 2024	Nov 09, 2024	Sage Doe	...0000	Posted		\$ 20.00 View
Any apparel Clothing and stores	Nov 07, 2024	Nov 07, 2024	Max Public	...0000	Posted		\$ 5.00 View
Any merchant Retail store	Nov 06, 2024	Nov 06, 2024	Taylor Smith	...0000	Posted		\$ 5.00 View
Any travel Airlines	Nov 05, 2024	Nov 05, 2024	Robin Smith	...0000	Posted		\$ 30.00 View
Items per page: 30 1 - 6 of 6 items 1 of 1							

View statements

Use this link to review and download the statements for the account you select in the Billing account dropdown list.



Cardholders

The Cardholders pane displays tiles containing summary information for the top eight cardholders with the highest current balance. This pane typically appears below the pane for most browsers; you need to scroll down to view it.

Each individual tile contains a Make a payment link to schedule a payment for the card on display. You can also select the Lock Card toggle to lock or unlock a card and prevent or reenable ongoing activity.

You can switch to the List view or select the View all cardholders link to connect to records on the Cardholders page.

Cardholders

Virtual cards

Create virtual card

Cardholders with highest balances

View all cardholders

0-50%51-75%76-100%

Missing accounts? Click "View all cardholders" upon selecting company record on "Billing account" dropdown to view all account types within the company

Jamie Public

jamie_public@example.com

Sub account

Card: ...0000

Active

Current balance

\$ 0.00

Make a payment

Available credit

\$12,000.00

Andy Doe

andy_doe@example.com

Sub account

Card: ...0000

Active

Current balance

\$ 0.00

Make a payment

Available credit

\$ 12,000.00

Jacky Smith

jacky_smith@example.com

Sub account

Card: ...0000

Active

Current balance

\$ 0.00

Make a payment

Available credit

\$ 10,000.00

Robin Smith

robin_smith@example.com

Sub account

Card: ...0000

Active

Current balance

\$ 0.00

Make a payment

Available credit

\$ 10,000.00

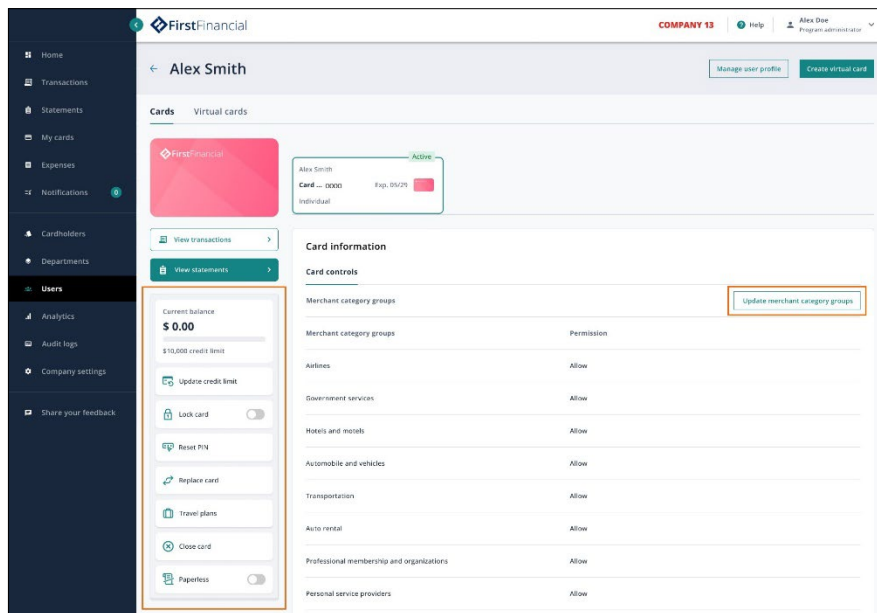
Program administrator tasks

At a glance

Manage cardholder cards, user profiles, and transactions from SpendTrack. Program administrators can maintain card settings, update profile information, review transaction activity, manage payment options, and perform account maintenance functions for individual cardholders and company accounts.

Manage cardholder cards

1. Navigate to **Cardholders** tab > **View all cardholders** > **Select menu** > **Manage cards**.



Under this section you can perform the following tasks:

- Select **Add temporary credit limit**.
 - Enter Temporary limit and End date.
 - Select **Save**.
- View transactions—A page of current cycle transactions appears. To view transactions from previous cycles, use the **Period** dropdown.
- Lock card—Navigate to the toggle button and Select **Yes** to Lock card.
- Reset PIN—To update the PIN, select the > button. Enter and confirm the new PIN and select **Submit**.
- Replace card—Navigate the popup window for contact information.
- Lost/Stolen—To block the card select **Yes** and **Continue**. Select **Done**. Be sure to call Southern Bank Customer Care 1-855-275-7226 to report the lost or stolen card.
- Damaged—If a card is damaged, verify the shipping address and select **Done** to order a new card.

- Travel plans—Select the button and select **Add travel plans**.
- Close card—Select the button and select **Yes** to close the card.
- Paperless—Select the toggle button, a popup window appears.

2. Select **View terms and conditions**.

3. Review terms and conditions carefully.



Note: If you do not fully review the terms and conditions, the checkbox remains grayed out and unavailable.

4. Select the **I have read and agree to the Terms & Conditions** checkbox.

5. Select **Enroll in paperless** button.

Update merchant category groups

A window appears to the right.

Alter the Permission between **Allow** and **Decline** for the desired merchant category group.

Select **Save and Close**.

Merchant category groups

Select merchant category groups and set controls you need for this card.

Permission	Merchant category
Allow	Airlines
Allow	Government services
Allow	Hotels and motels
Allow	Automobile and vehicles
Allow	Transportation
Allow	Auto rental
Allow	Professional membership and organizations
Allow	Personal service providers
Allow	Utilities
Allow	Repair services
Allow	Contracted services
Allow	Business services
Allow	Miscellaneous stores
Allow	Service providers
Allow	Retail stores
Allow	Amusement and entertainment
Allow	Clothing and stores

Save and close

Manage user/cardholder profile

Do one of the following:

- Navigate to **Cardholders** tab > **View all cardholders** > **Select menu** > **Manage user profile**.
- For any of the eight cardholders with the highest balances, navigate to **Cardholders** tab > **Select menu** > **Manage cards**.
- For selected cardholder, navigate to **Cardholders** tab > **View all cardholders** > **Select menu** > **Manage cards** > **Manage user profile**.
- For a PA managing their own profile, navigate to select your name in the top right to view a dropdown list > **Profile and preferences**.

The screenshot displays the 'Manage user profile' page for 'Andy Doe'. At the top, there's a header with a back arrow, a profile icon, the name 'Andy Doe', and a subtitle 'View and update user information here'. A 'Manage cards' button is in the top right. The main content is divided into two sections: 'Personal information' and 'Contact information'. Each section has a table of details and an 'Update' button. The 'Personal information' section includes fields for First name, Last name, Date of birth, SSN / Tax ID, Employee ID, Department, Department manager, and User role. The 'Contact information' section includes fields for Email, Mobile phone number, Home phone number, and Work phone number & extension. At the bottom, there are two buttons: 'Disable user' (with a tooltip 'Temporarily disable user access to this company.') and 'Remove user' (with a tooltip 'Permanently remove user from this company.').

Personal information			
First name	Last name	Date of birth	SSN / Tax ID
Andy	Doe	Mar 10, 1998	***-**-0000
Employee ID	Department	Department manager	User role
0000000000000000	Company 13	Pat Smith	User

Contact information			
Email	Mobile phone number	Home phone number	Work phone number & extension
andy.doe@example.com	+1 (000) 555-0000	+1 (000) 555-0000	+1 (000) 555-0000 - 122

Disable user Temporarily disable user access to this company. **Remove user** Permanently remove user from this company.

Manage profiles in SpendTrack at an account level. The window splits profiles into two sections: Personal information (SpendTrack user profiles) and Contact information.

Update personal information

Personal information

First name *

Alex

Last name *

Doe

Date of birth

MMM DD, YYYY

SSN / Tax ID

Tax ID ▾

.*0000

Employee ID

000000000000

Department *

Company13 ▾

Department manager

Jamie Public

User role *

Program administrator ▾

One Time Passcode *

Resend OTP

Cancel

Generate OTP

Update personal information

Personal information

First name *

Alex

Last name *

Doe

Date of birth

MMM DD, YYYY

SSN / Tax ID

Tax ID ▾

.*0000

Employee ID

000000000000

Department *

Company13 ▾

Department manager

Jamie Public

User role *

Program administrator ▾

One Time Passcode *

Resend OTP

Cancel

Save

Update contact information

Contact information

Remember this information is associated to your profile as your Username to login to this application and to receive notifications such as OTP (One Time Passcode).

Email *

alex_doe@example.com

Cell phone number

+1 ▾

(000) 555-3333

Home phone number

+1 ▾

(000) 555-0000

Work phone number and extension

+1 ▾

(000) 555-0000

122

One Time Passcode *

Resend OTP

Cancel

Generate OTP

Update contact information

Contact information

Remember this information is associated to your profile as your Username to login to this application and to receive notifications such as OTP (One Time Passcode).

Email *

alex_doe@example.com

Cell phone number

+1 ▾

(000) 555-3333

Home phone number

+1 ▾

(000) 555-0000

Work phone number and extension

+1 ▾

(000) 555-0000

122

One Time Passcode *

Resend OTP

Cancel

Save and next

Update contact information

Apply this update to SpendTrack user profile

Contact information update will be applied to your SpendTrack user profile. This will be used for electronic statement enrollment.

Name	Role
☒  Alex Doe alex_doe@example.com	Program administrator

Apply this update to cards

Contact information update will be applied to selected card(s). This will impact your electronic statement enrollment & fraud alerts.

☒	Card profile	Account type	Exp. date	Status
☒	 ...0000	Individual	MM/DD	Active

Cancel

Save and close



Note: Updating contact information about an account only updates the profile information in SpendTrack. It does not update the bank's primary system. Use the **Apply this update to cards** link to selectively apply updates to checked card profiles in the account processor.



Important! PA clients receive workflow notifications when cardholders update their personal contact information in SpendTrack. Contact Southern Bank Customer Care to make an address change request, 1-855-275-7226.

View cardholder transactions

Do one of the following:

- For company and control accounts, navigate to **Transactions** tab > **Billing account**.
- For any of the eight cardholders with the highest balances, navigate to **Cardholders** tab > **Select menu** > **View transactions**.
- For a selected cardholder profile, navigate to the **Cardholders** tab > **View all cardholders** > **Select menu** > **View transactions**.

The cardholder Transactions page has the following functions:

- Period—Change from the current period to previous month cycles.
- View payment activities—Displays the payment activities page for the account.
- Make a payment—Displays a dialog box to make a one-time payment and autopay for a control account and an individual-pay account.
- Set up autopay—Displays a dialog box for recurring payments.
- Add payment account—Choose a payment account or add a new one.
- Paperless
- Manage payment accounts
- View statements—Select a statement to download as a PDF.
- Export—Exports the list of transactions as a CSV or QBO file.

Cardholders Virtual cards Create virtual card

Cardholders with highest balances | View all cardholders

Missing accounts? Click "View all cardholders" upon selecting company record on "Billing account" dropdown to view all account types within the company

Cardholder	Card	Status	Current balance	Available credit
Jamie Public jamie_public@example.com Sub account	Card: ... 0000	Active	\$ 0.00	\$12,000.00
Andy Doe andy_doe@example.com Sub account	Card: ... 0000	Active	\$ 0.00	\$12,000.00
Jacky Smith jacky_smith@example.com Sub account	Card: ... 0000	Active	\$ 0.00	\$10,000.00
Robin Smith robin_smith@example.com Sub account	Card: ... 0000	Active	\$ 0.00	\$10,000.00

Transactions Billing account: West coast Period: Current period

Balance Breakdown by category

Current balance: \$1,457.72

Available credit: \$8,542.00 Credit limit: \$10,000.00

uChoose rewards: 5000

Payment information

Your payment is past due - make a payment today to bring your account current.

Last statement balance	Minimum payment due	Payment due date	Past due amount
\$1,457.72	\$1,234.00	Dec 18, 2024	\$1,204.00

Make a payment Set up autopay Add payment account

Paperless | Manage payment accounts | View statements

All transactions

Search by cardholder, merchant or amount Filter Export

Transactions Billing account: West coast Period: Current period

Balance Breakdown by category

Current period

No spending

Category	Amount
Contracted services	\$ 0.00
Airlines	\$ 0.00
Auto rental	\$ 0.00
Hotels and motels	\$ 0.00
Transportation	\$ 0.00
Utilities	\$ 0.00
Professional membership and org...	\$ 0.00
Others	\$ 0.00

Payment information

Your payment is past due - make a payment today to bring your account current.

Last statement balance	Minimum payment due	Payment due date	Past due amount
\$1,457.72	\$1,234.00	Dec 18, 2024	\$1,204.00

Make a payment Set up autopay Add payment account

Enable paperless statements

At a glance

Enable paperless statements to receive and manage account statements electronically within SpendTrack. After you review and accept the terms and conditions, you can enroll in paperless delivery and view or download statements as PDF files.

Prerequisites

- PA account access

Enable paperless statements

1. Navigate to the Transactions page.
2. Select **Paperless** to view paperless options.
3. Move the slider to **Enable**.
4. Select **View terms and conditions**.
5. Review terms and conditions carefully.
6. Select the **I have read and agree to the terms and conditions** checkbox.



Note: If you do not fully review the terms and conditions, the checkbox remains grayed out and unavailable.

7. Select **Enroll in paperless** button. You can view statements or download them as PDFs.

Paperless

Go paperless and get electronic statements starting with your next billing cycle.

- You will receive email notifications for paperless enrollment and statement availability. PDF statements can also be viewed under "Statements" when you log in to your SpendTrack account.
- When we make changes to your agreements with us, we'll email you. These notices may contain PDF attachments.
- You may still get paper documents for certain changes to your account.

You must open the link below in order to review and provide your consent.

[View terms and conditions](#)

☐ I have read and agree to the terms and conditions.

Maybe later

Enroll in paperless

Make cardholder payments

At a glance

Make one-time and recurring cardholder payments from SpendTrack. Program administrators can create payments for billing and cardholder accounts and configure recurring autopay schedules when applicable.

Prerequisites

- PA account access

Make cardholder payments

1. Do one of the following:

- For any billing account within the company, navigate to **Billing account** dropdown > **Make a payment**.
- For any of the eight cardholders with the highest balances, navigate to **Cardholders** tab > **Make a payment**.
- For any selected cardholder profile, navigate to **Cardholders** tab > **View all cardholders** > **Select menu** > **View transactions**.

Transactions

Andy Doe
...0000 Exp. date: 05/27

Period
Current period

Balance

Breakdown by category

Current balance
\$ 1,457.72

Available credit: **\$ 8,542.00** | Credit limit: **\$ 10,000.00**

0-50% 51-75% 76-100%

uChoose rewards
5000

Payment information

View payment activities

⚠ Your payment is past due - make a payment today to bring your account current.

💡 Your automatic payment is set for **minimum due amount on the due date of each month**.

Last statement balance: **\$ 1,457.72** | Minimum payment due: **\$ 1,234.00** | Payment due date: **Dec 18, 2024** | Past due amount: **\$ 1,204.00**

Make a payment | Update autopay | Add payment account

Paperless | Manage payment accounts | View statements

All transactions

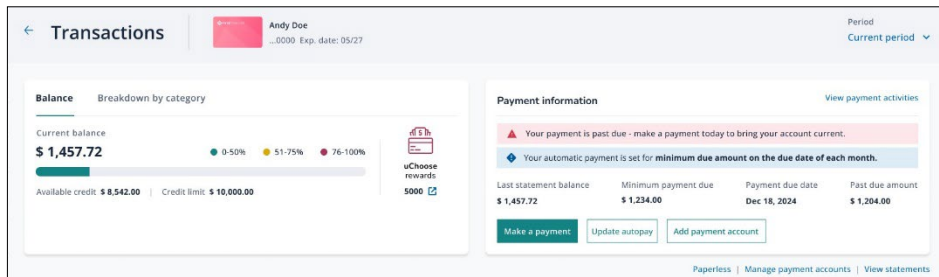
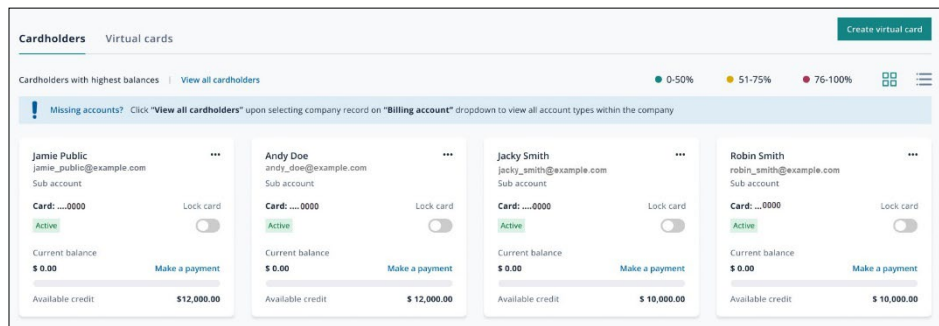
Search by cardholder, merchant or amount

Filter

Export

Merchant	Transaction date	Posted date	Status	File a dispute	Amount
Any travel Airlines	Nov 10, 2024	Nov 10, 2024	Posted	1	\$ 537.00 View
Any restaurants Hotels and motels	Nov 09, 2024	Nov 09, 2024	Posted	2	\$ 40.00 View
Any coffee shop Hotels and motels	Nov 09, 2024	Nov 09, 2024	Posted	3	\$ 20.00 View
Any apparel Clothing and stores	Nov 07, 2024	Nov 07, 2024	Posted	4	\$ 5.00 View
Any merchant Retail store	Nov 06, 2024	Nov 06, 2024	Posted	5	\$ 5.00 View
Any travel Airlines	Nov 05, 2024	Nov 05, 2024	Posted	6	\$ 30.00 View

Items per page: 30 | 1 - 6 of 6 items | 1 of 1



Make a one-time payment

1. Select **Make a payment**.
2. Choose a payment date.
3. Choose an amount.

 **Note:** Add a payment amount before making a payment.

4. Select a payment account from the dropdown.
5. Select **View terms and conditions**.
6. Review terms and conditions carefully.
7. Select the checkbox for the payment disclosure.

 **Note:** If you do not fully review the terms and conditions, the checkbox remains grayed out and unavailable.

8. Select **Pay**.

 **Note:** The one-time payment for **Other amount** cannot exceed the current balance of the account.

Make a payment

Autopay

View payment activities

Your automatic payment is set for **minimum due amount on the due date of each month.**

Payments submitted before **4:00 PM CST (5:00 PM EST)** will be considered as today's payment.

Choose payment date *

Payment can be scheduled up to 30 days in advance.

☐ Due date

Dec 18, 2024

☒ Choose a different date

May 06, 2025

Choose amount *

☒ Minimum payment due

\$ 1,234.00

☐ Current balance

\$ 1,457.72

☐ Last statement balance

\$ 1,457.72

☐ Other amount

Payment account *

Account 01

Add payment account

You must open the link below in order to review and provide your consent.

View terms and conditions

☒

I have read and agree to the terms and conditions. I authorize 360 FEDERAL CREDIT UNION to debit the account with the amount that I have chosen in this web form on the date selected. I understand this is a one-time payment authorization and these funds may be withdrawn from the chosen account on the date selected or on the following banking day. You can cancel this authorization online from SpendTrack till 04:00 PM CST (05:00 PM EST) on or before the scheduled authorization date alternatively you can contact 360 FEDERAL CREDIT UNION at (982) 370-5859 till 04:00 PM CST (05:00 PM EST) on or before the scheduled authorization date.

Cancel

Pay

Make an autopay payment

1. Select **Autopay**.
2. Choose a payment date.
3. Choose an amount.

4. Choose an account type between checking and savings.
5. Enter the routing and bank account number.
6. Select **View terms and conditions**.
7. Review terms and conditions carefully.
8. Select the checkbox for the payment disclosure.



Note: If you do not fully review the terms and conditions, the checkbox remains grayed out and unavailable.

9. Select **Pay**.



Note: The one-time payment for **Other amount** cannot exceed the current balance of the account.

Make a payment

Autopay

[View payment activities](#)

◆ Payment is already scheduled. Click "View payment activities" for more details.

◆ Payments submitted before 4:00 PM CST (5:00 PM EST) will be considered as today's payment.

◆ Autopay scheduled will be effective from next statement cycle. Please make one-time payment for the current cycle.

Choose payment date *

☒ Due date ⓘ

The 18th of each month

☐ Choose a different date ⓘ

Choose amount *

☒ Minimum payment due

\$ 1,234.00

☐ Current balance

\$ 1,457.72

Available only when you choose a different date as the payment date.

☐ Last statement balance

\$ 1,457.72

☐ Other amount

Account type *

☒ Checking

☐ Savings

ABA routing number *

ABA routing number

Bank account number

Confirm bank account number

Bank account number

Confirm bank account number

You must open the link below in order to review and provide your consent.

[View terms and conditions](#)

☐ I have read and agree to the terms and conditions. I authorize 360 FEDERAL CREDIT UNION to debit the account with the amount that I have chosen in this web form on the date selected. I understand this is a one-time payment authorization and these funds may be withdrawn from the chosen account on the date selected or on the following banking day. You can cancel this authorization online from SpendTrack till 04:00 PM CST (05:00 PM EST) on or before the scheduled authorization date alternatively you can contact 360 FEDERAL CREDIT UNION at (982) 370-5859 till 04:00 PM CST (05:00 PM EST) on or before the scheduled authorization date.

Cancel

Set payment



Note: Payments are available for all account types. Use the Autopay tab to set up recurring payments. Autopay is not applicable for subaccounts.

View payment activities

At a glance

View payment activity for billing accounts, control accounts, subaccounts, and individual pay accounts. The Payment Activities page displays pending and past payments, allowing you to monitor payment status for the selected account.

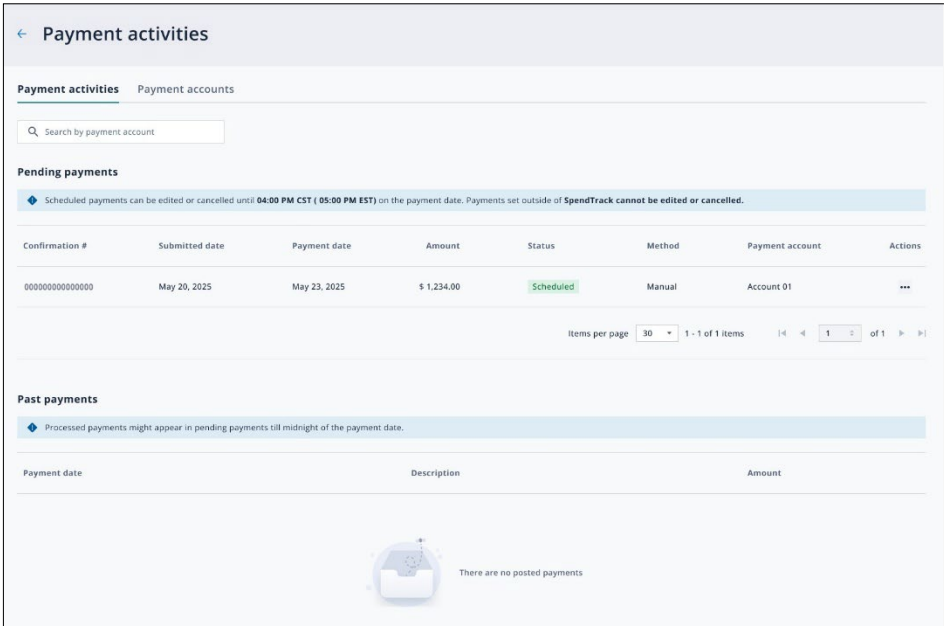
Prerequisites

- PA account access

View payment activities

Do one of the following:

- For any billing account within the company, navigate to **Billing account** dropdown > **View payment activities**.
- For any of the eight cardholders with the highest balances, navigate to **Cardholders** tab > **Select menu** > **View transactions** > **View payment activities**.
- For the selected cardholder profile, navigate to the **Cardholders** tab > **View all cardholders** > **Select menu** > **View transactions** > **View paymentactivities**.



From this page you can view account type payments. This includes control account, subaccount, or individual pay account:

- Pending payments display scheduled payment on the account.

- Past payments display posted payment on the account.



Note: You can edit or cancel scheduled payments until 04:00 PM CT (05:00 PM ET) on the payment date. Processed payments might appear in Pending payments until midnight of the payment date.

Add or manage a payment account

At a glance

Add, update, and remove payment accounts used for card and billing account payments in SpendTrack. Program administrators can manage existing payment accounts, delete accounts, and create new checking or savings payment accounts for future payment transactions.

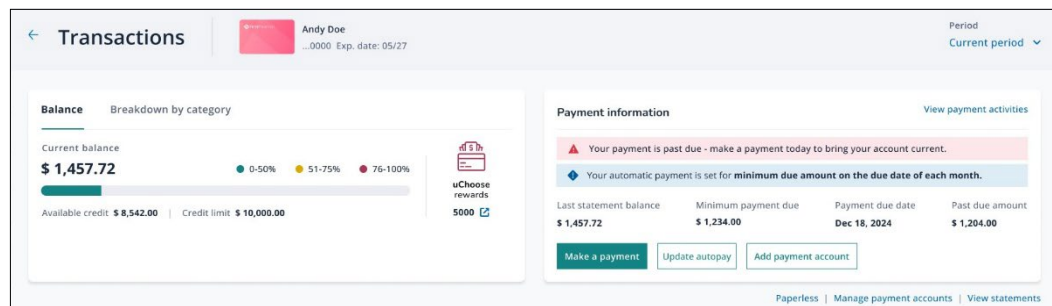
Prerequisites

- PA account access
- Access to a billing or cardholder account

Add or manage a payment account

1. Do one of the following:

- For any billing account within the company, navigate to **Billing account** dropdown > **View payment activities** > **Payment accounts** tab > **Edit**.
- For any of the eight cardholders with the highest balance, navigate to **Cardholders** tab > **Select menu** > **View transactions** > **Add payment account** or **Manage payment accounts**.
- For any selected cardholder profile, navigate to **Cardholders** tab > **View all cardholders** > **Select menu** > **View transactions** > **Add payment account** or **Manage payment accounts**.



- Select **Remove** to delete the payment account.

2. Do any of the following tasks:

- Select **Edit** to update the payment account.
- Select **Remove** to delete the payment account.

← Payment activities

Payment activities

Payment accounts

Add payment account

Account nick name	Account type	ABA routing number	Bank account number	Name on account	Actions
Account 01	Checking	000000000	...0000	Account 01 Default	Edit Remove

Items per page

30

1 - 1 of 1 items

<

1

>

3. Select **Add Payment Account** to add a new account.

- Select the account type.
- Complete the form.
- Select **Add Payment Account**.

← Add payment account

Account type *

☒ Checking
 ☐ Savings

ABA routing number *

000000000

Bank account number *

Confirm bank account number *

Name on account *

Account 03

Account nickname *

Account 03

☒ Set as default payment account

Cancel

Generate OTP

← Add payment account

Account type *

☒ Checking
 ☐ Savings

ABA routing number *

000000000

Bank account number *

Confirm bank account number *

Name on account *

Account 03

Account nickname *

Account 03

☒ Set as default payment account

One Time Passcode *

[Resend OTP](#)

Cancel

Add payment account

Reassign cards

At a glance

Reassign a card to the correct SpendTrack user profile when a card record exists with the card processor but is not linked to the corresponding SpendTrack user record. You can also undo a card reassignment if needed.

Prerequisites

- PA account access

Reassign cards

In some instances, a client record in SpendTrack is not connected to the card record with the card processor. Assign the card to the SpendTrack client record.

Example: Sid Doe is an employee for the business and already has a business card that is an existing card recorded with the card processor. Sid also has a user record in SpendTrack, but Sid's card is not connected to the SpendTrack user record.

1. Do one of thefollowing:

- For any of the eight cardholders with highest balances, navigate to **Cardholders Tab > Select menu > Reassign card**.
- For a selected cardholder profile, navigate to **Cardholders Tab > View all cardholders**

Reassign card ending in ...0000

You may transfer this card to any user within the same company.

Search for a user

Q Andy Doe

New cardholder

Andy Doe
andy_doe@example.com

Cancel Reassign card

>Select menu > Reassign card.

2. Search for the SpendTrack user record.
3. Select the user from the search results.
4. Select **Reassign card**.

Undo a reassignment

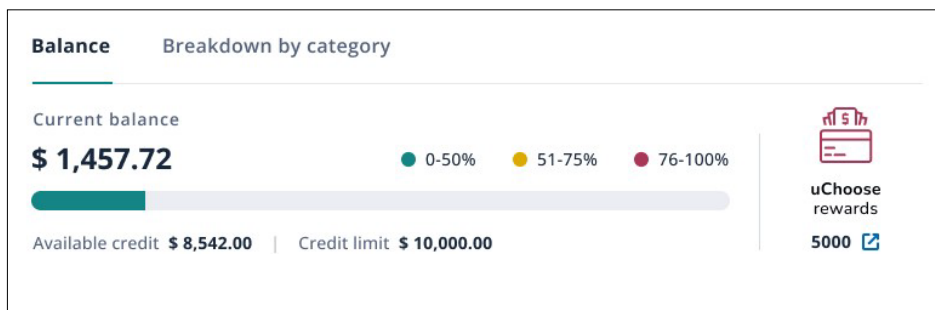
1. Select **Cancel reassign card** from the action menu. A confirmation popup appears.
2. Select **Yes** from the confirmation popup to undo the reassignment.

View and redeem uChoose Rewards

Do one of the following:

- For the billing account under the company, navigate to **Billing account > Balance > Reward points**.
- For a selected cardholder profile, navigate to **Cardholders tab > View all cardholders > Select menu > View transactions > Rewards**.

An account enrolled in uChoose Rewards® can view points totals from the home page for billing accounts within the company. You can view rewards points on the transaction's pages. Select the arrow icon next to the points to sign in through single sign-on (SSO) to the uChoose Rewards website and redeem points. To redeem points on the uChoose Rewards website, select the arrow icon next to the points to sign in through single sign-on (SSO).



Analytics

At a glance

Use the Analytics page to review spending activity and trends across your organization. Analytics provide visual insights into transaction volumes, spending amounts, top merchants, and merchant category group spending over selected timeperiods.

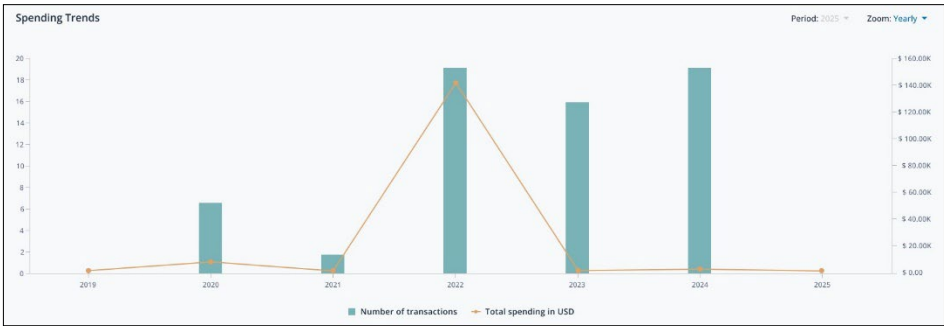
Prerequisites

- PA account access

Spending trends

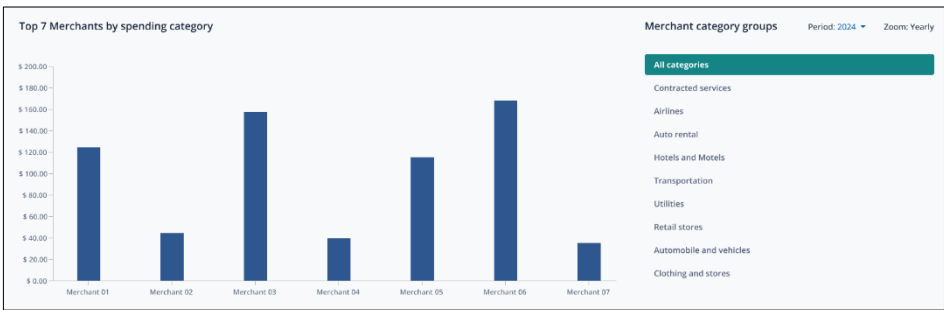
This chart displays a total number of transactions forming the spend amount in a specific timeframe. Hover over the chart to view a specific number of transactions and spend value.

Select the options below the chart to display by data year, quarter, month, or last 7 days.



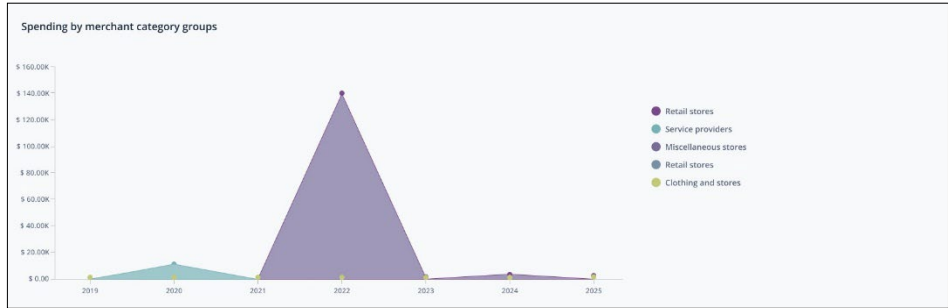
Top seven merchants by spending category

This chart displays merchant spend data. View the top five of all merchants or select a category on the right to view the top five merchants for that specific category.



Spending by merchant category groups

The Spending by Category chart displays the spending data by time frame and merchant category groups. Hover over the chart to view specific spend values.



Navigate notifications

At a glance

Use the Notifications page to review, approve, and decline requests submitted by cardholders. The page displays pending requests, approval workflows, comments, notification history, and approval statuses. The page also provides search and filtering options to help locate specific requests.

Prerequisites

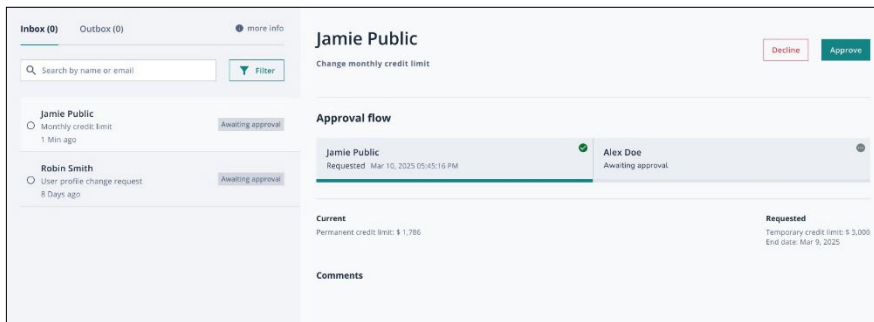
- PA account access

Navigate notifications

1. Navigate to **Notifications** from the navigation pane. The Inbox displays requests from cardholders that are awaiting approval. Messages include useful information, including the approval flow and comments.
2. Select a message in the Inbox to display the request details and options.
 - **Approve**—Approves the request and sends a notification to the requester.
 - **Decline**—Rejects the request and sends a notification to the requester.

Additional information

- Requests and their approval status display on the Notifications page.



- To search for notifications, enter name and email into the search function.
- Filter notifications by Type, Status, and Date range.

Filters notifications

×

Type

-Select type

Status

-Select status

Date range

-Select date range

Current month

Last 90 days

Custom range

Filter notifications

×

Type

-Select type

Merchant category groups

Card application

User profile

Credit limit

-Select date range

Cancel

Apply

Filter notifications

×

Type

-Select type

Status

-Select status

Approved

Declined

Requested / Awaiting approval

Cancel

Apply

Department head features

At a glance

Department heads manage users, cards, and virtual cards within their assigned departments. They can approve requests, oversee spending, manage department structures, and view department-level reporting.

Prerequisites

- PA account access

Department head features

The Department head owns a set of features that are exclusively managed within their department.

Card management

- Activate card
- Request credit limit change
- Request temporary credit limit change
- Lock card / Unlock card
- Reset PIN
- Replace card
- Report lost or stolen
- Travel plans
- Close card
- Paperless
- View monthly statements
- Download monthly statements
- Request Merchant Category group change
- View transactions
- Download transactions (standard CSV)
- View rewards
- Redeem rewards
- New card application
- Make a payment
- Autopay
- Add payment account
- Manage payment account

User management

- Request personal information change
- Request contact information change
- Reset password
- Self-unlock

- Disable user
- **Virtual card**
 - Create a Virtual card for yourself
 - Create a Virtual card for others
 - Update a Virtual card for yourself
 - Update Virtual card for others
 - Approve and decline Virtual card
 - Lock/Unlock Virtual card
 - View Virtual card transaction
 - Close Virtual card

Department

- Edit department name
- View users inside department

Miscellaneous

- Notifications
- Share your feedback

Create a department

You can group users into departments for analysis. You can place an individual user in only one department. You can create subdepartments as necessary. You can assign department heads who have enhanced capabilities as well.

Navigate to **Departments** from the navigation pane.

Options include:

- Add user—Adds a user to an existing department.
- Add department—Creates a new department.
- Add department head—Adds a user to the department head role.
- Add sub department—Creates a new subdepartment.
- Pencil icon—Edit the department or subdepartment.
- Trash icon—Deletes the department or subdepartment.

The screenshot shows a 'Departments' management page. At the top right is an 'Add user' button. Below the header, the 'Information technology' department is selected, with 'Alex Doe' listed as the head. To the right of this header is an 'Add department' button. Below the header, there are three expandable department rows: 'Information technology' (head: Alex Doe), 'Sales', and 'Marketing'. Each row has an 'Add sub department' button and an 'Edit department head' button with a pencil icon.

Edit a department

1. Navigate to **Departments** from the navigation pane.
2. Select the arrow to the right of the department name to open the record.
3. Select the **pencil icon** to the right of Dept. Head to edit. Information under Users includes names, email, profile, and status.

The screenshot shows a modal window titled 'Edit department' with a close button (X) in the top right corner. Inside the modal, there is a label 'Department name *' followed by a text input field containing the text 'Information technology'. At the bottom right of the modal is a green 'Save' button.

View department spend analytics

Sign in to SpendTrack as a department head user.

Department heads have enhanced capabilities for the departments to which they are assigned:

- Home—View spend analytics on the home page and spend by spend for each user within the department.
- Notifications—View client requests, such as spend limit increases. The system first sends user requests to the department head before the PA. From the Notifications page, department heads select Approve or Decline. After the department head approves a request, SpendTrack sends it to the PA for final approval.
- Users—View a list of users in the department. Options include send an invitation email, disable user, reset password, view transactions, and view card profile.
- Card Profile—View details of the cardholder. Options include locking a card and resetting a PIN.

Home page

Good day, Alex!

Here is what's happening with your accounts and cardholders

Departments

Information technology

Company 13 (Information technology)

Breakdown by category

Current period

No spending

Airlines\$ 0.00

Hotels and motels\$ 0.00

Transportation\$ 0.00

Utilities\$ 0.00

Retail stores\$ 0.00

Business services\$ 0.00

Repair services\$ 0.00

Other\$ 0.00

Latest transactions

View all transactions

Any travel

Nov 15, 2024

\$ 537.00

Posted

Any restaurants

Nov 15, 2024

\$ 40.00

Posted

Any coffee shop

Nov 15, 2024

\$ 20.00

Posted

Any apparel

Nov 15, 2024

\$ 5.00

Posted

Any merchant

Nov 15, 2024

\$ 5.00

Posted

Notifications page

Inbox (0)

Outbox (0)

more info

Search by name or email

Filter

Jamie Public

Monthly credit limit

1 Min ago

Awaiting approval

Robin Smith

User profile change request

8 Days ago

Awaiting approval

Jamie Public

Change monthly credit limit

Decline

Approve

Approval flow

Jamie Public

Requested

Mar 10, 2025 05:45:16 PM

Alex Doe

Awaiting approval

Current

Permanent credit limit: \$ 1,786

Requested

Temporary credit limit: \$ 3,000

End date: Mar 9, 2025

Comments

Users

At a glance

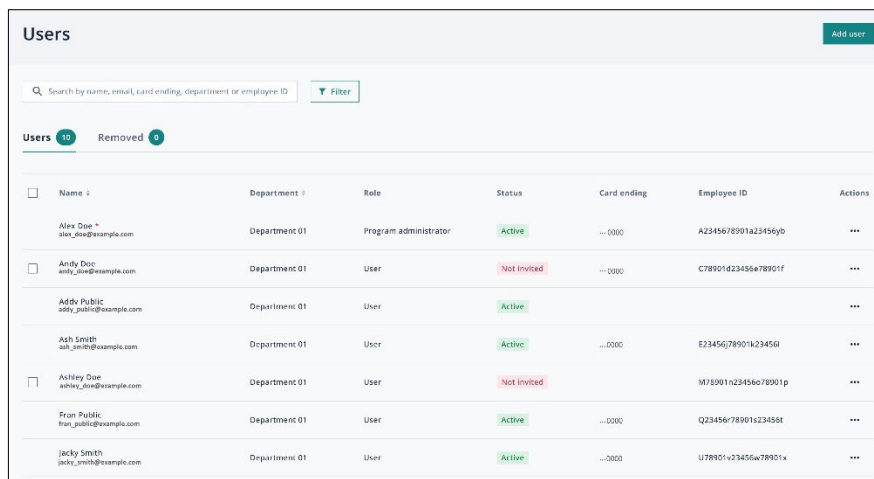
From the Users page, clients can manage existing users, create new users, and add cards to users.

Prerequisites

- PA account access

Manage users

1. Navigate to **Users** from the navigation pane. The Users page appears.



☐	Name	Department	Role	Status	Card ending	Employee ID	Actions
☐	Alex Doe alex_doe@example.com	Department 01	Program administrator	Active	...0000	A2345678901a23456yb	...
☐	Andy Doe andy_doe@example.com	Department 01	User	Not invited	...0000	C78901d23456e78901f	...
☐	Andy Public andy_public@example.com	Department 01	User	Active			...
☐	Ash Smith ash_smith@example.com	Department 01	User	Active	...0000	E2345678901k23456d	...
☐	Ashley Doe ashley_doe@example.com	Department 01	User	Not invited		M78901n23456o78901p	...
☐	Fran Public fran_public@example.com	Department 01	User	Active	...0000	Q2345678901l23456t	...
☐	Jacky Smith jacky_smith@example.com	Department 01	User	Active	...0000	U78901v23456w78901x	...

2. Do any of the following:
 - Search by name or email.
 - If the status is Not Invited, select the checkbox to the left. Then select the Invite Selected button at the top of the page.
 - If the company participates in self-registration, the PA does not need to invite cardholders to access SpendTrack. The system sends the cardholder a welcome email with instructions. After self-registering, the PA approves or declines the request from the Notifications page.
 - Select a column heading to sort the list.
 - Select a record to open the user page.
 - Select the action menu to the right for additional options:
 - Manage user profile—Opens the Edit User page.
 - Manage cards—Opens the Card Profile page.
 - Disable User—Changes the status to Inactive.

- Reset Password—Prompts the user to reset the password.
- View card transactions, if the user has a card
- Remove user
- Manage company access

Create a new user

PAs create new users from this page, which is the first step in submitting an application for a new card. To create a new user:

1. Navigate to **Users** from the navigation pane.
2. Select **Add User**.
3. Complete the required fields email, first name, and last name. The phone number fields are optional.
4. Select either **Program Administrator**, **Reporting Administrator**, or **User** from the Select role dropdown list.

The screenshot shows a modal window titled "Add user" with a close button (X) in the top right corner. The form contains the following fields and options:

- Email address ***: Text input with "robin_doe@example.com".
- First name ***: Text input with "Robin".
- Last name ***: Text input with "Doe".
- Mobile phone number**: Text input with "+1" in a dropdown and "(000) 555-0000".
- Home phone number**: Text input with "+1" in a dropdown and "(000) 555-0000".
- Work phone number and extension**: Text input with "(000) 555-0000" and "122".
- Select role ***: Dropdown menu with "User" selected.
- Select department profile ***: Dropdown menu with "Root department" selected.

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

5. Select a department from the Select department profile dropdown list. The PA manages the list of departments from the Departments page.
6. Select **Add User** to create a new user record or **Add and invite the user** to create a record and send the user an invitation email to sign in to SpendTrack. The user receives an email with instructions to sign in.

Add a card

After you create a new user, the user displays in the Users page. When you add a card to a user, the system creates a cardholder record with the card processor. The card processor then mails a physical card to the

address on file. To add a card to the user:

1. Navigate to **Users** from the navigation pane and select a user from the list.
2. Select **Create credit card** from the Create card dropdown list. The New Card Application popup window appears.
3. Complete the form and select **Submit**. This is the same form as **My cards > Create card > Create credit card**.

Submitting this form begins the card creation process. You can see the card on the home page under the Cardholder tab after you create it.

Add subaccounts

Businesses that want to have subaccounts linked to control accounts begin by working with Southern Bank Customer Care to create the control accounts.

To add subaccounts to a control account:

- Southern Bank creates a control account with at least one subaccount linked to it the Bank's system.
 - The PA creates a new user in SpendTrack.
 - The PA adds a new card to each user.
1. Navigate to the Card Settings step in the New Card Application form.
 2. Select **Subaccount** from the Billing Level dropdown list.
 3. Select an account from the **Billing Account Last Four** dropdown list to link the new card to the control account.

Manage company access

At a glance

Manage which companies a user can access in SpendTrack. Assign or remove company access and manage company assignments from the Users page. Each user needs to be assigned to at least one company. A PA can assign up to 50 companies to a single user.

Prerequisites

- PA account access

Manage company access

Program Administrators use Manage Company Access to control which companies a user can access.

Select the **Users** menu in the left navigation. This page lists all the users inside the company. Select a user, then click the **More** icon (ellipsis) on the **right side**. A dropdown appears, and one of the options is **Manage Company Access**.

The screenshot shows the FirstFinancial Users page. The left navigation menu has the 'Users' option highlighted. The main content area displays a table of users with columns for Name, Department, Role, Status, Card ending, Employee ID, and Actions. A dropdown menu is open for the user 'Ashley Doe', showing options like 'View transactions', 'Reset password', 'Manage user profile', 'Manage card', 'Disable user', 'Remove user', and 'Manage company access'. The 'Manage company access' option is highlighted with a red box.

Name	Department	Role	Status	Card ending	Employee ID	Actions
Alex Doe * alex_doe@example.com	Root Department	Program administrator	Active	... 0000	A2345678901a23456yb	...
Andy Doe andy_doe@example.com	Department 01	User	Not invited	... 0000	C78901d23456e78901f	...
Addy Public addy_public@example.com	Department 01	User	Active	...	...	...
Ash Smith ash_smith@example.com	Department 01	User	Active	... 0000	E2345	...
Ashley Doe ashley_doe@example.com	Department 01	User	Not invited	...	M789	...
Fran Public fran_public@example.com	Department 01	User	Active	... 0000	Q2345	...
Jacky Smith jacky_smith@example.com	Department 01	User	Active	... 0000	...	...
Jade Doe jade_doe@example.com	Department 01	User	Not invited	...	Y2345678901a23456yb	...
Jamie Public jamie_public@example.com	Department 01	User	Active	... 0000	...	...
Jay Smith jay_smith@example.com	Department 01	User	Active	... 0000,0000	G23456h78901i23456j	...
Jerry Doe jerry_doe@example.com	Department 01	User	Not invited	... 0000	K78901l23456m78901n	...
Kyle Public kyle_public@example.com	Department 01	User	Active	...	...	...
Lynn Smith lynn_smith@example.com	Department 01	User	Active	... 0000	W23456x78901y23456z	...
Max Doe max_doe@example.com	Department 01	User	Not invited	... 0000	...	...
Pat Public pat_public@example.com	Department 01	User	Active	... 0000	R23456g78901q23456	...
Robin Smith robin_smith@example.com	Department 01	User	Active	... 0000	W23456x78901y23456z	...

The **Manage Company Access** view displays all companies currently available to that user and allows Program Administrators to add or remove company access as needed by toggling companies on or off. Program Administrators can assign up to 50 companies to a single user. This flexibility ensures that a user

Audit logs and settings

At a glance

View and monitor audit activity and system changes in SpendTrack. Audit logs provide visibility into updates made to user records, helping administrators track changes and support auditing and compliance requirements.

Prerequisites

- PA account access
- Access to at least one onboarded company

View audit logs

1. Audit logs track and display changes made to user records. Complete the following to view audit logs:
2. Select **Audit Logs** from the navigation pane.
3. Use the **Event** dropdown list and the date fields to filter the list by criteria in a date range.
4. Select **Export to CSV** to save the data as a .csv file.

Audit logs

User activity

Authentication activity

Event

All

Start date *

Jan 21, 2025

End date *

Jan 28, 2025

Apply

Export to CSV

Date and time	Modified by	Action	Changes for	Updated value
Jan 28, 2025 9:29:21 PM	alex_smith@example.com	User modified	addy_public@example.com	Substatus:invited,userboarding
Jan 27, 2025 5:21:42 PM	alex_smith@example.com	User modified	pat_public@example.com	Substatus:invited,userboarding
Jan 26, 2025 3:18:36 PM	alex_smith@example.com	User created	robin_smith@example.com	Userboardingstatus:pending,email:
Jan 25, 2025 12:15:16 PM	alex_smith@example.com	Department membership created	jacky_smith@example.com	Organisation:ruet1 inc,fullname
Jan 24, 2025 11:29:21 AM	andy_doe@example.com	User profile completed	Wehyrosyplbxcdrhomi - Alex Doe	
Jan 23, 2025 8:21:42 AM	alex_smith@example.com	User profile auto approved	wehyrosyplbxcdrhomi - Alex Doe	ID:wehyrosyplbxcdrhomi/member
Jan 22, 2025 6:18:36 AM	alex_smith@example.com	Workflow config created	max_doe@example.com	Name:approval by custom level rep
Jan 21, 2025 4:15:16 AM	jade_doe@example.com	Expense updated	jamie_public@example.com	Expenseid:frymc5qmmde,segmen
Jan 21, 2025 3:15:16 AM	alex_smith@example.com	Department membership created	lynn_smith@example.com	Organisation:ruet1 inc,fullname

Items per page 30 1 - 9 of 9 items 1 of 1

Related information

- [Analytics](#)

Settings navigation

At a glance

Manage personal account settings and update profile preferences in SpendTrack. The Settings page allows users to maintain account security, including updating passwords and managing profile information.

Prerequisites

- PA account access

Change password

Make edits to your profile in Settings.

1. Select your name in the top right to view a dropdown list.
2. Select **Settings**. The Settings page displays.
3. Select the **Change password** link.

Settings	
Personal	
Name:	Alex Doe
Email address:	alex_doe@example.com
Password:	Change password