Client portal guide: dashSpend

Table of Contents:

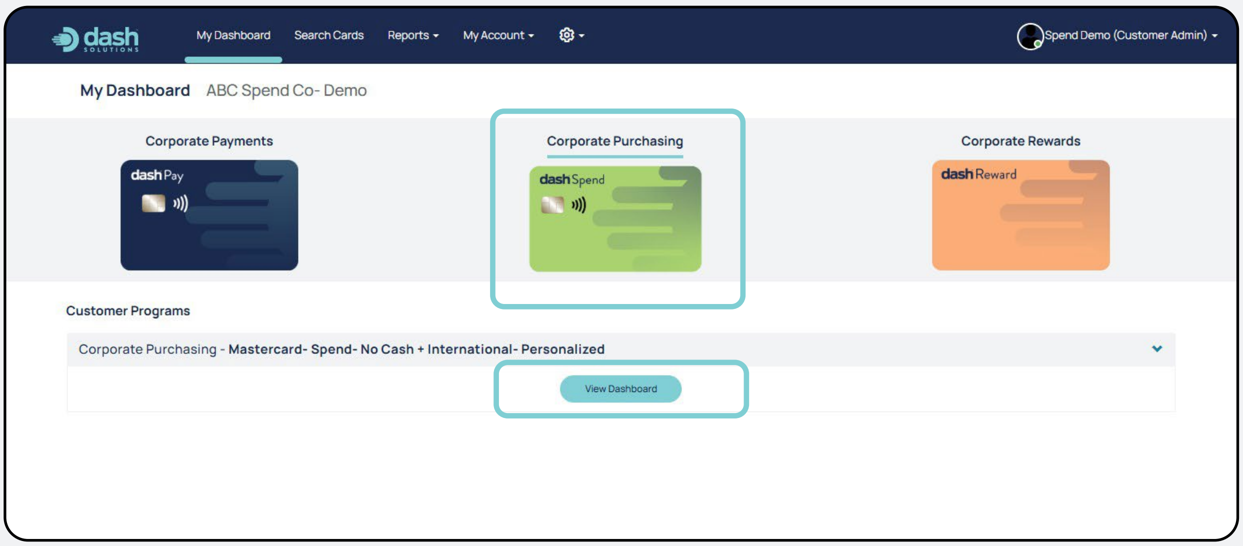
Login:

Log in to your account using your username and password.

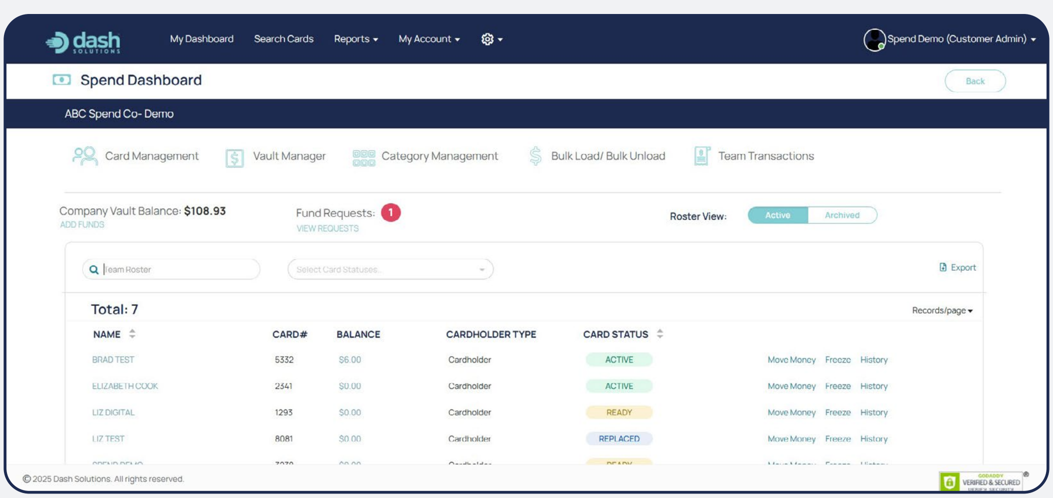
Dashboard:

Once logged in, you will see your main dashboard.

- Click on the “View Dashboard” button to navigate to your Corporate Purchasing program dashboard.



- You are now in “Roster View.” From here, you will be able to access the following:
  - Company vault balance
  - Fund requests from cardholders
  - Cardholder details and management
  - Toggle between active and/or archived team members



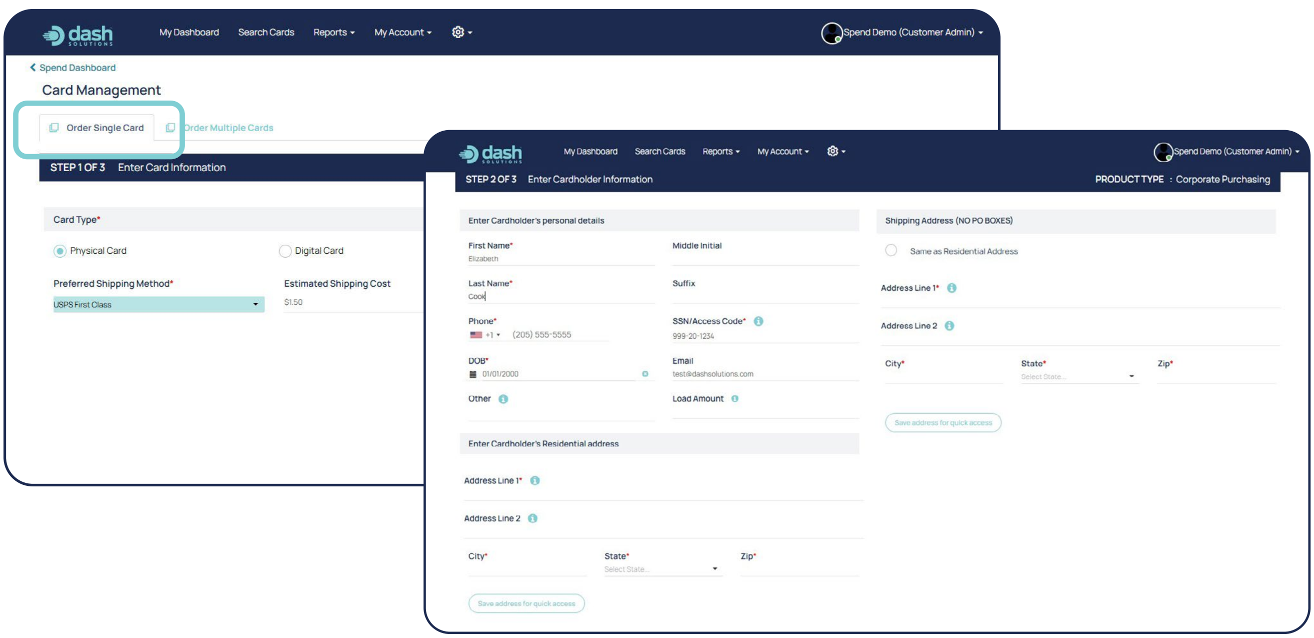
- From the “Roster View Dashboard”, you can:
  - Order and Register cards
  - Manage company vault
  - Manage categories
  - Bulk load and unload cards
  - Export consolidated team transaction reports

Card Management:

Under Card Management, you have the ability to order single cards or place bulk card orders.

To order a single card:

- Click on “Order Single Card” tab



- Enter cardholder details for all fields with a red asterisk. This includes:
  - First/last name
  - Phone number
  - SSN/Access Code

    You will need to input a number in this field. This can be a generic, 9-digit access code such as a tax ID number or employee ID number. If you do not have either of these, please input a generic number of your choice. This number will be used for identity verification if/when calling customer service.
  - Cardholder date of birth
  - Physical address
- Click “Next Page”, which will take you to a confirmation page to place the order.

- If cards will not be issued under a specific individual's name, you can use the first and last name areas to describe the entity in which the card will be used.

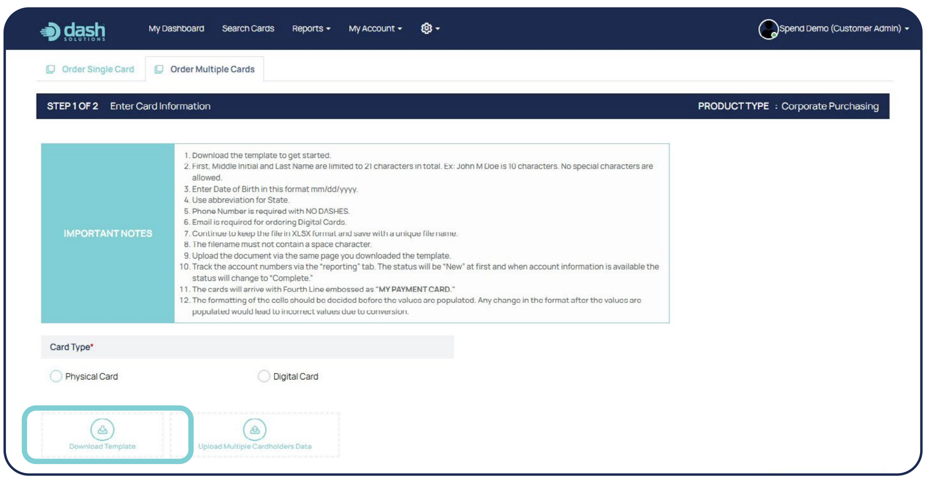
  e.g. First Name: 123 Main Last Name: Street or First Name: Star Last Name: Management 1,

  First Name: Star Last Name: Management 2

- Please note, this is the name that is printed on the purchasing card. There is a 21 character limit on first and last name combined, including spaces.

To order bulk cards:

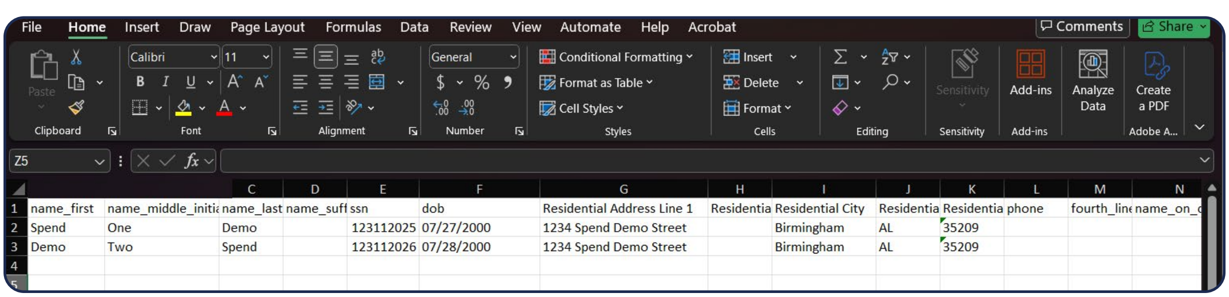
- You have the option to ship cards in bulk via UPS to a single address or ship cards individually via USPS to multiple addresses.
- Click on "Order Multiple Cards" tab
- Click on "Download Template" button at bottom of screen



- Open up template and enter the required cardholder information, including:
  - First/last name
  - Phone number
  - SSN/Access Code

    You will need to input a number in this field. This can be a generic, 9-digit access code such as a tax ID number or employee ID number. If you do not have either of these, please input a generic number of your choice. This number will be used for identity verification if/when calling customer service.

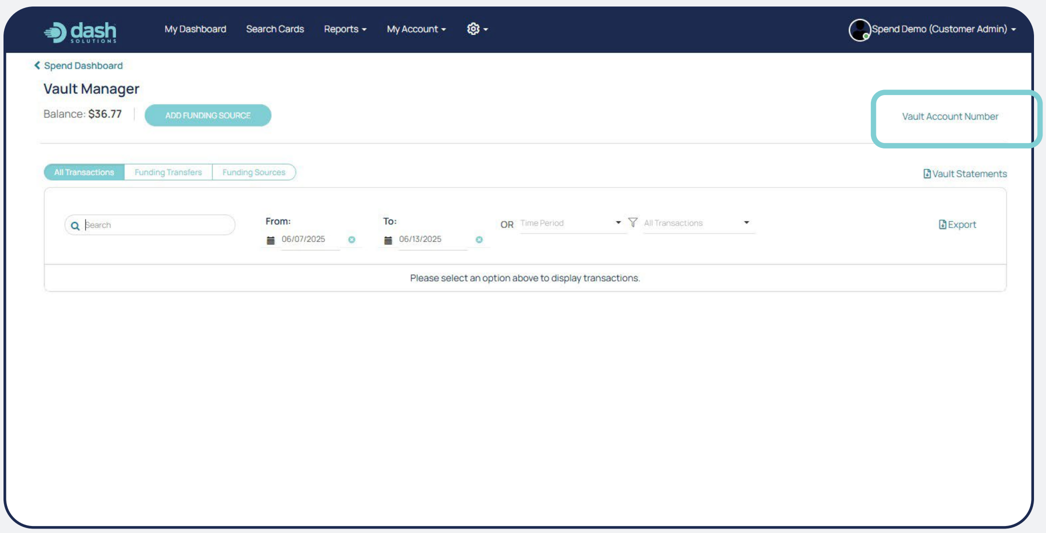
  - Cardholder date of birth
  - Physical address

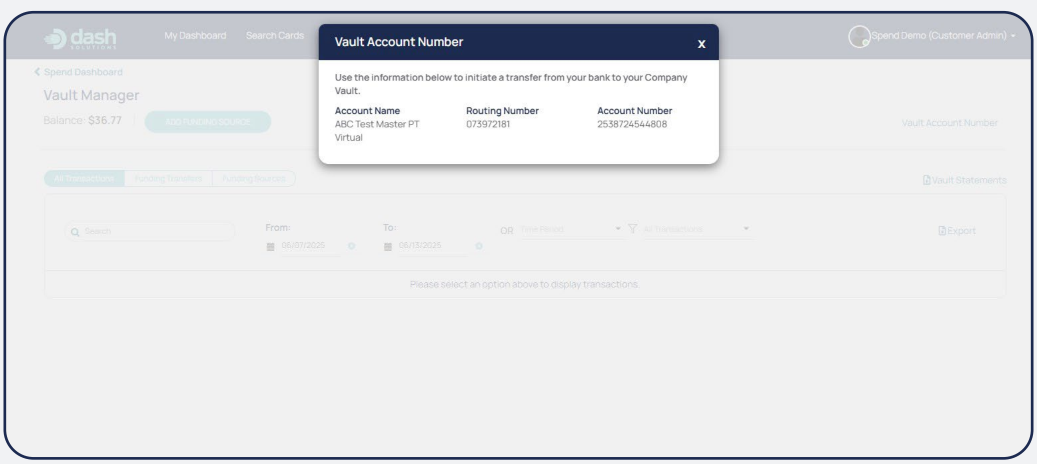


- Note: “Fourth Line” is used if you would like the card embossed with company name or other message (character limit is 21 including spaces).
- Be sure to read through the important notes for formatting.
- Once you have completed the template, save the file with a unique name then upload the saved file to the Upload Multiple Cardholders Data area to process the order.

Vault Manager:

Your vault has an established account and routing number that allows you to push funds from an external source directly into the vault. Once funds are available within your Company Vault you are able to move funds to cards in real time. Your current vault balance, vault transaction history, and vault account number can always be found here.



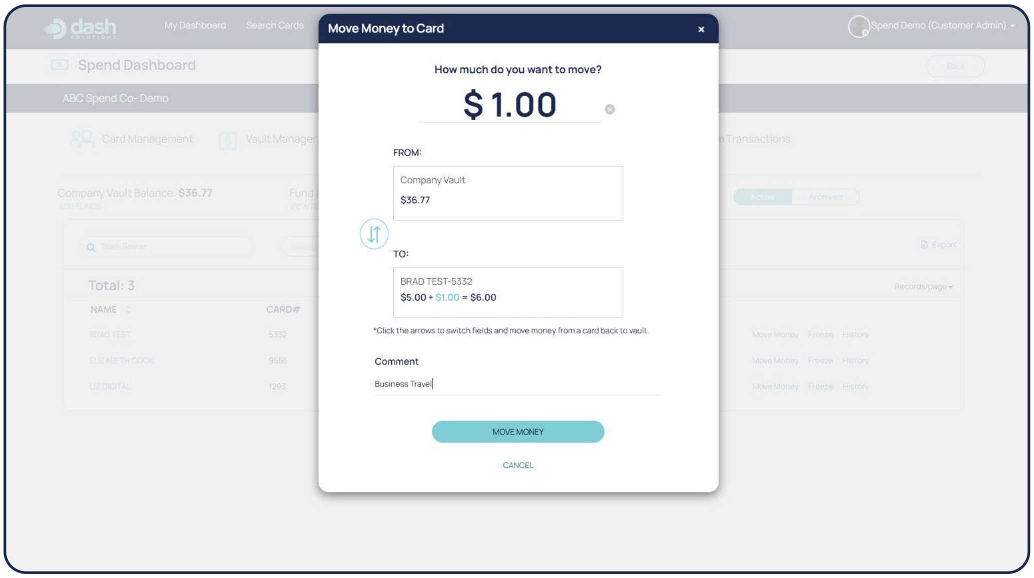


Single Card Loads:

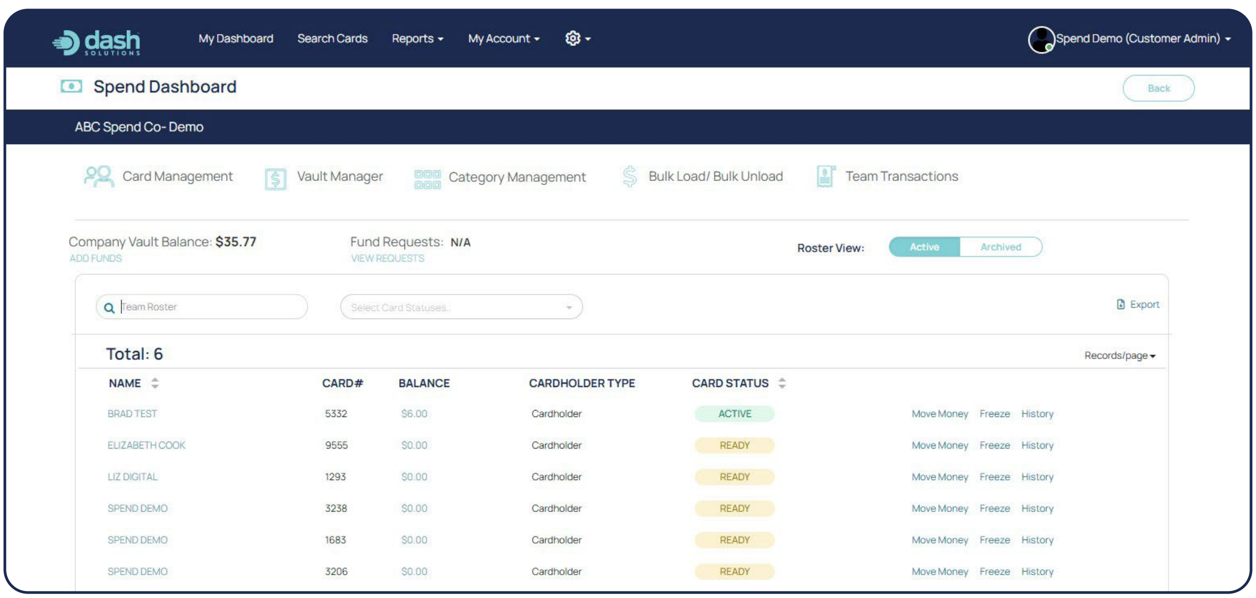
Funds can be loaded onto cards once you have sufficient funds in your Company Vault.

- In Dashboard/Roster View, you will see all cards listed with current balance and card status.
- Find the cardholder you’d like to fund and click “Move Money”.

- Click “Load Funds” on the popup and enter the amount you would like to load on the card. Add comments if needed. These comments can be viewed by the cardholder within the cardholder application. Comments will also carry over into reporting. Once you click the Move Money button, money will be moved instantly from your Company Vault to the card.



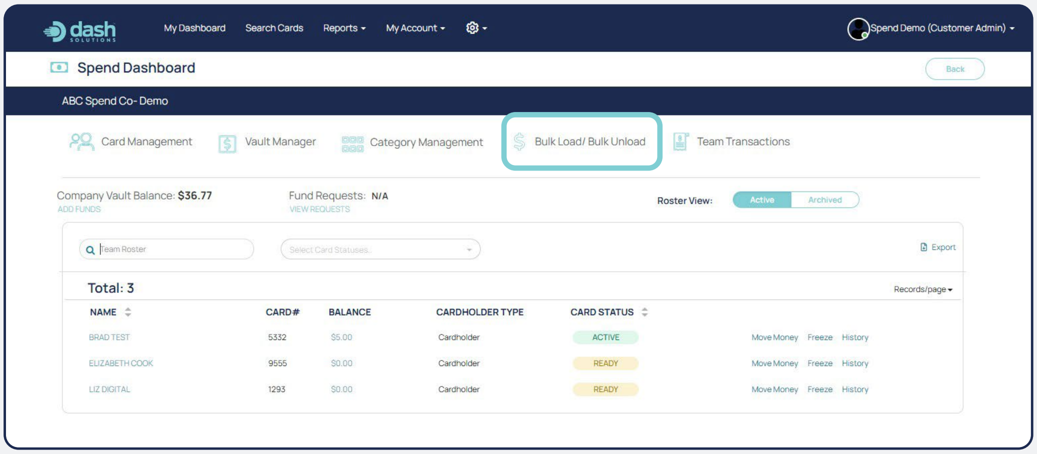
- Once submitted, you will be taken to the Roster.

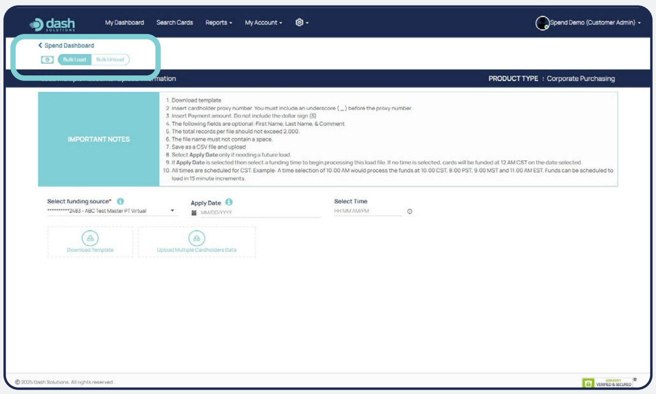


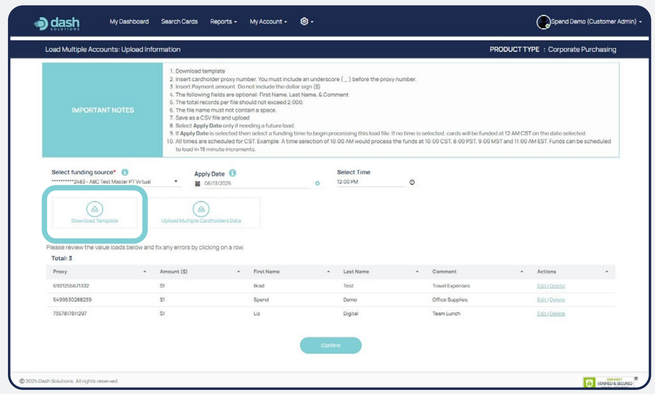
Bulk Load:

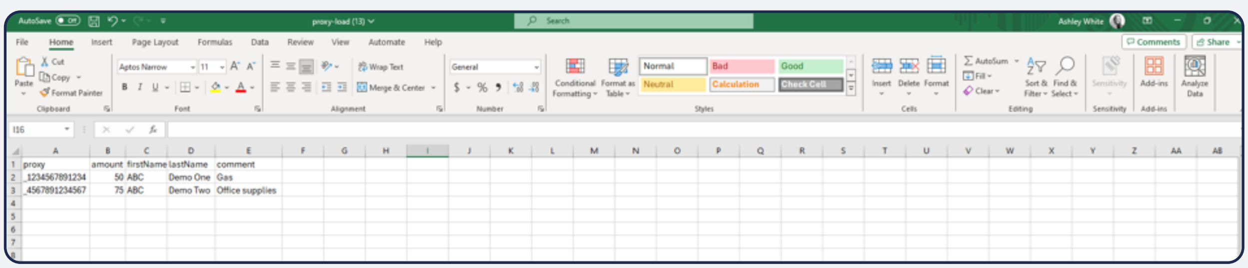
Bulk Load / Bulk Unload allows you to load or unload more than one card at a time.

- From the dashboard, click on “Bulk Load / Bulk Unload” and then toggle to Bulk Load or Bulk Unload at the top, depending on the action you would like to take. Download the template and enter the proxy number that you want to load or unload.
  - Note: be sure and lead with an “_” and then the amount you want loaded on the card or unloaded off of the card. You do not need to add the $ sign.







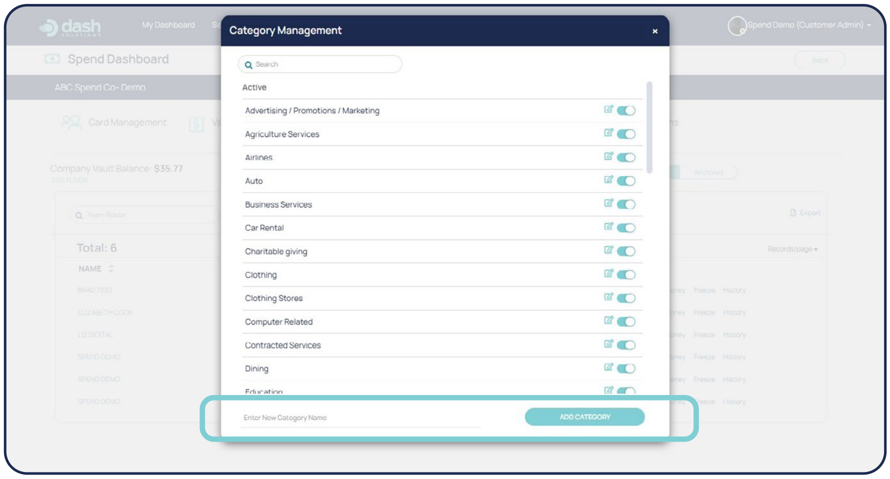


- First/last name and comment columns are optional, but this information may be helpful for reporting purposes.
- Save the file with a unique name and then upload to the Upload Multiple Cardholders Data area. Your file will now be processed. Please note, this could take up to one hour for full completion.

Category Management:

For reporting transparency, by default, we have enabled standard categories that cardholders can choose from after a transaction has been made.

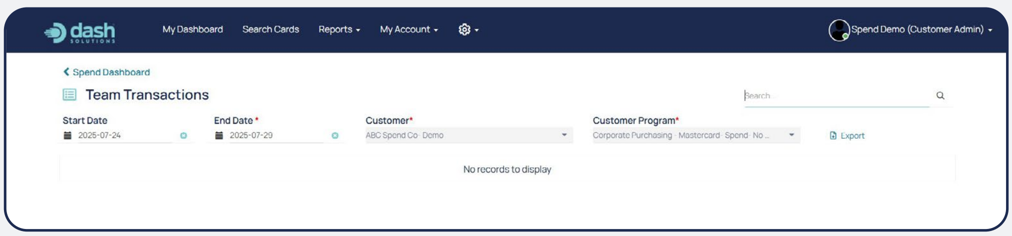
- These categories are automatically enabled but can be disabled by using the associated toggle button. There is also an option to add custom categories for your specific business needs. Categories filter back into business reporting when associated with a transaction.

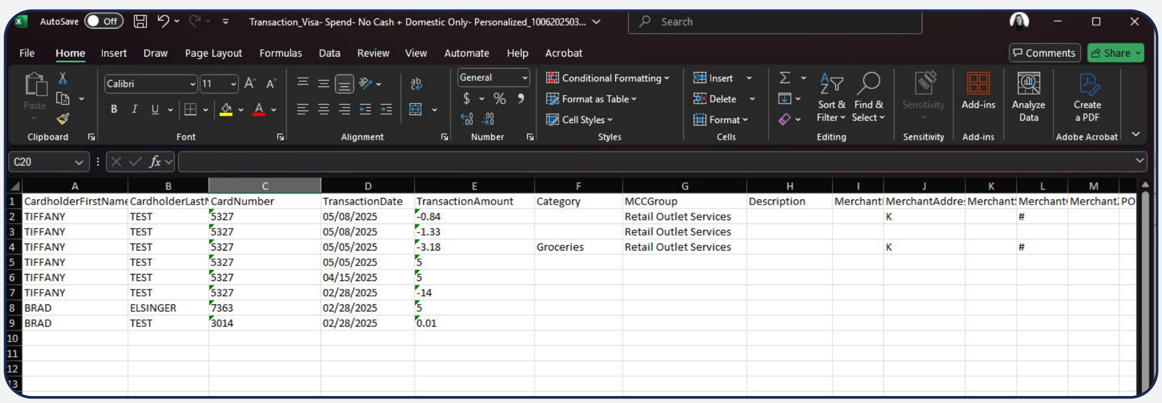


Team Transactions:

The Team Transactions report allows you to pull consolidated transaction history across all cards within the date range of your choice.

- Here, you can export this report in either Excel, CSV, or a Quickbooks-accepted format.



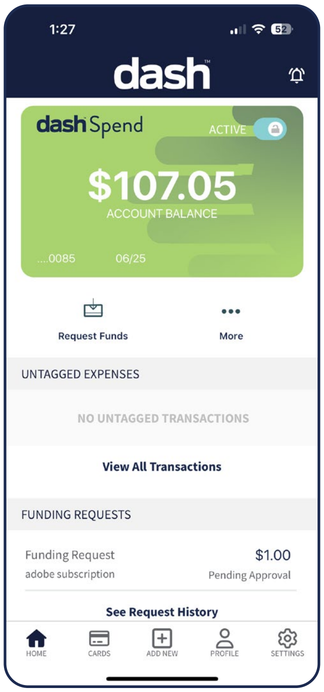


CardholderFirstName	CardholderLastN	CardNumber	TransactionDate	TransactionAmount	Category	MCCGroup	Description	Merchant	MerchantAddre	Merchant	Merchant	Merchant	PO
TIFFANY	TEST	5327	05/08/2025	-0.84		Retail Outlet Services			K		#		
TIFFANY	TEST	5327	05/08/2025	-1.33		Retail Outlet Services							
TIFFANY	TEST	5327	05/05/2025	-3.18	Groceries	Retail Outlet Services			K		#		
TIFFANY	TEST	5327	05/05/2025	5									
TIFFANY	TEST	5327	04/15/2025	5									
TIFFANY	TEST	5327	02/28/2025	-14									
BRAD	ELSINGER	7363	02/28/2025	5									
BRAD	TEST	3014	02/28/2025	0.01									

MyDashCard:

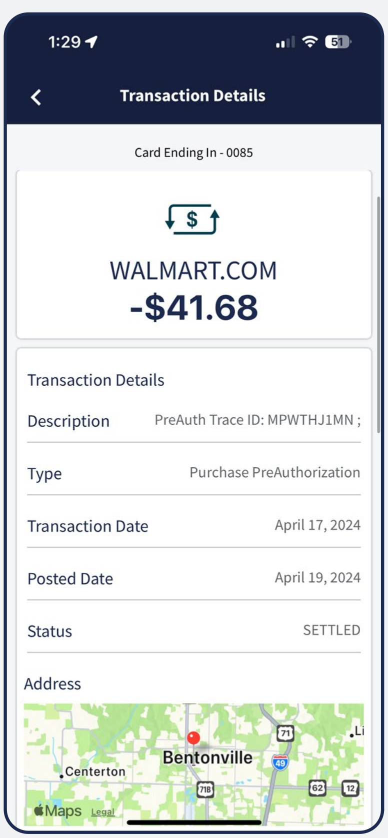
Cardholders can keep track of spending and balance, within the MyDashCard mobile app or on a desktop via MyDashCard.com. Here, they can upload a receipt, categorize a transaction, and leave a comment against the transaction that will carry through to business reporting.

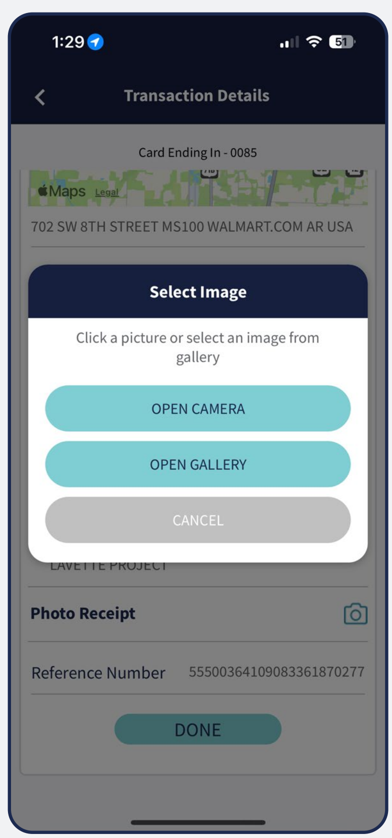
Download the MyDashCard mobile app from the app store OR login at mydashcard.com.

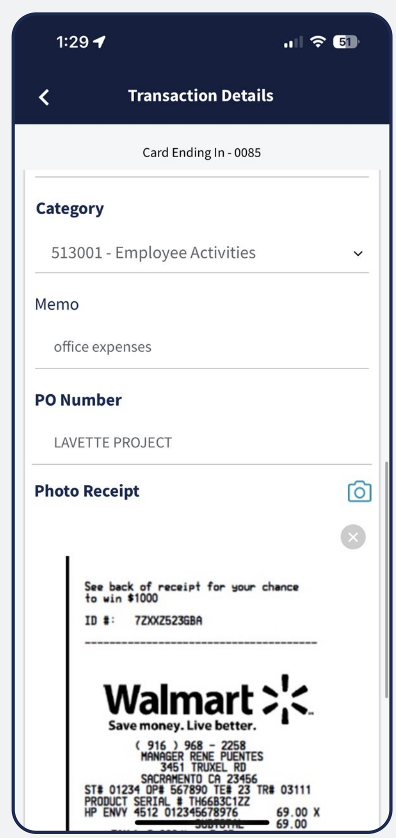


Tag Transactions:

A user can click an individual transaction to categorize, upload, and comment on the purchase. Once that information has been entered and saved, the transaction is removed from the untagged expenses area and the user can click the View All Transactions link to review or make adjustments.

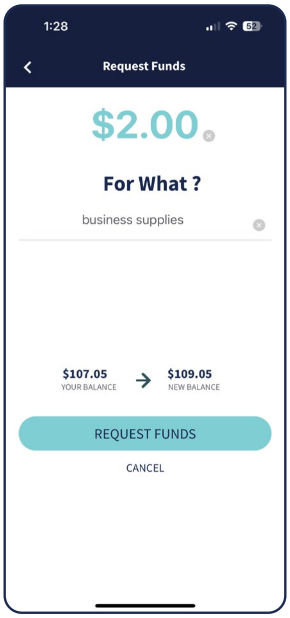


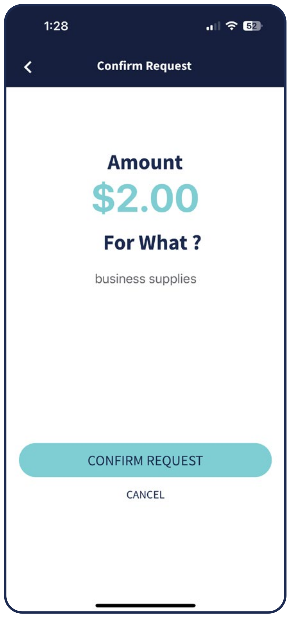


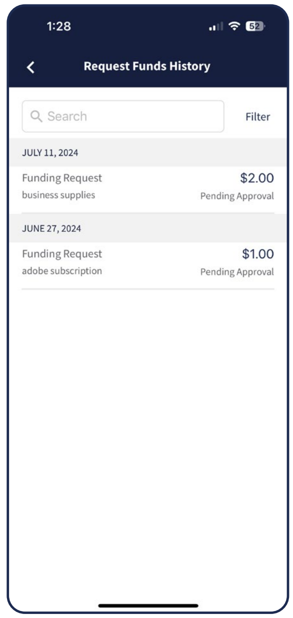


Request Funds:

A cardholder can request funds from an admin by clicking the Request Funds button in the cardholder application. The cardholder will be prompted to enter in an amount and reason for requesting the funds. Once requested, an email will be sent to the portal admin.







The company admin will receive an email alerting them of the request. The email will provide details of the request, as well as a link directly to the admin portal. The admin can approve or decline the request with a reason. If approved, the card will be automatically funded from the Company Vault. If declined, the cardholder will receive an alert that the request was declined.