

Client portal guide: dashSpend

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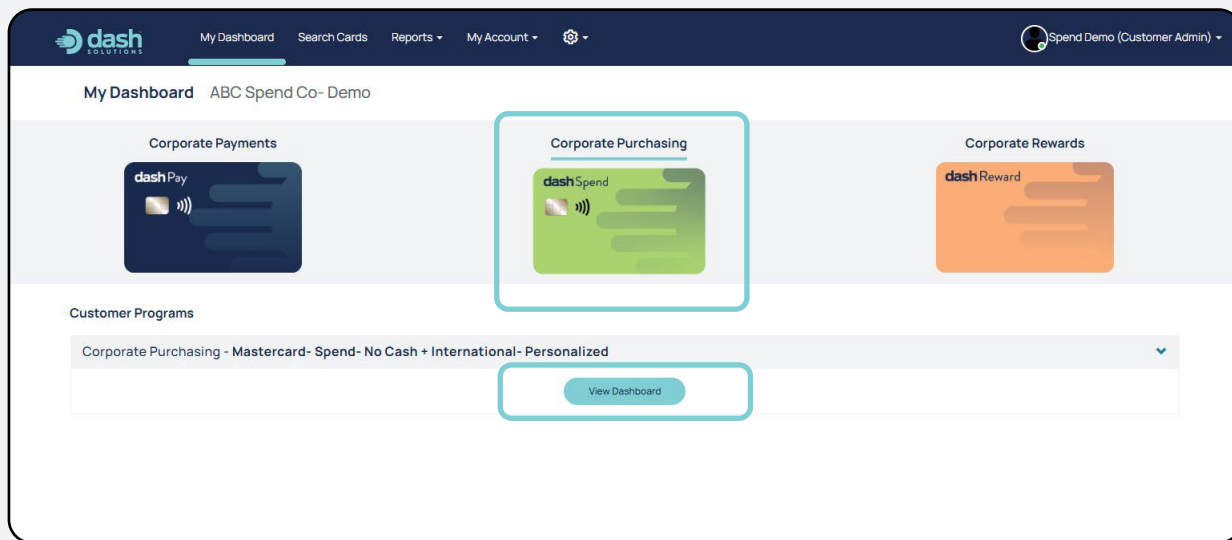
Login:

Log in to your account using your username and password.

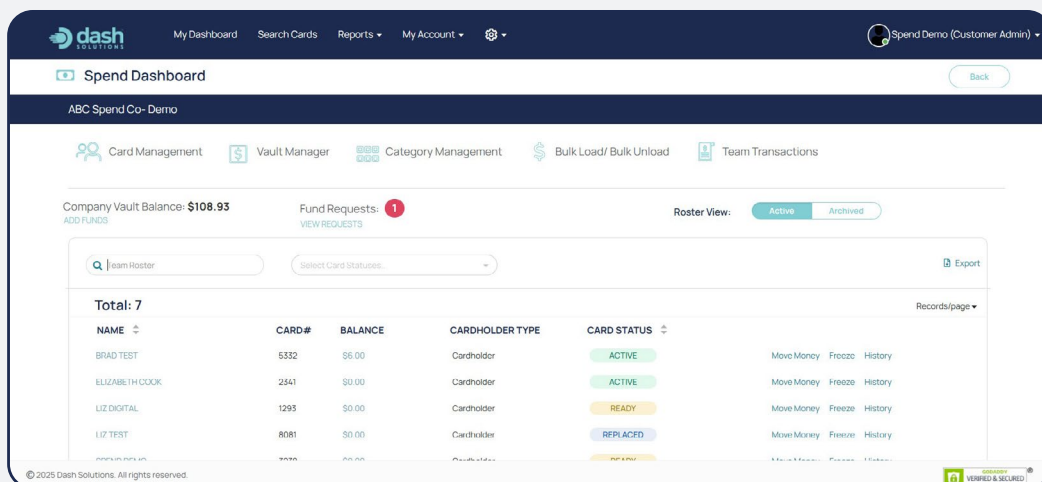
Dashboard:

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

The screenshot displays the Dash Solutions web application interface for Card Management. The top navigation bar includes links for My Dashboard, Search Cards, Reports, My Account, and a user profile for Spend Demo (Customer Admin). The main content area is divided into two steps:

STEP 1 OF 3: Enter Card Information

- Card Type:** Radio buttons for Physical Card (selected) and Digital Card.
- Preferred Shipping Method:** A dropdown menu showing USPS First Class.
- Estimated Shipping Cost:** Displayed as \$1.50.

STEP 2 OF 3: Enter Cardholder Information

This step is divided into two main sections:

- Enter Cardholder's personal details:**
 - First Name* (Required), Middle Initial, Last Name* (Required), Suffix.
 - Phone* (Required) with a dropdown for country code (+1) and a text field for the number (205) 555-5555.
 - SSN/Access Code* (Required) with a text field containing 999-20-1234.
 - DOB* (Required) with a date picker showing 01/01/2000.
 - Email (Required) with a text field containing test@dashsolutions.com.
 - Load Amount (Optional) with a text field.
- Enter Cardholder's Residential address:**
 - Address Line 1* (Required), Address Line 2.
 - City* (Required), State* (Required) with a dropdown menu, and Zip* (Required).
 - A button labeled "Save address for quick access" is present.

On the right side of the interface, there is a section for **Shipping Address (NO PO BOXES)** with a radio button option for "Same as Residential Address" and fields for Address Line 1*, Address Line 2, City*, State*, and Zip*.

- 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.

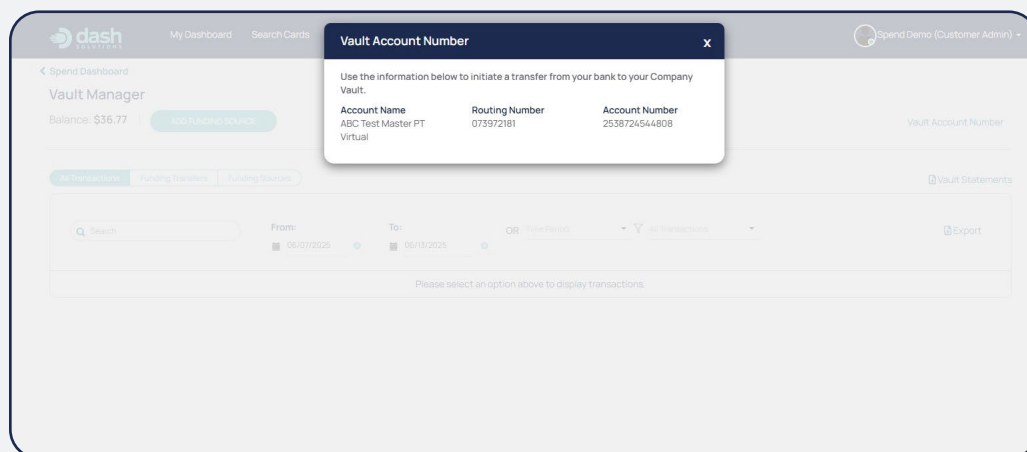
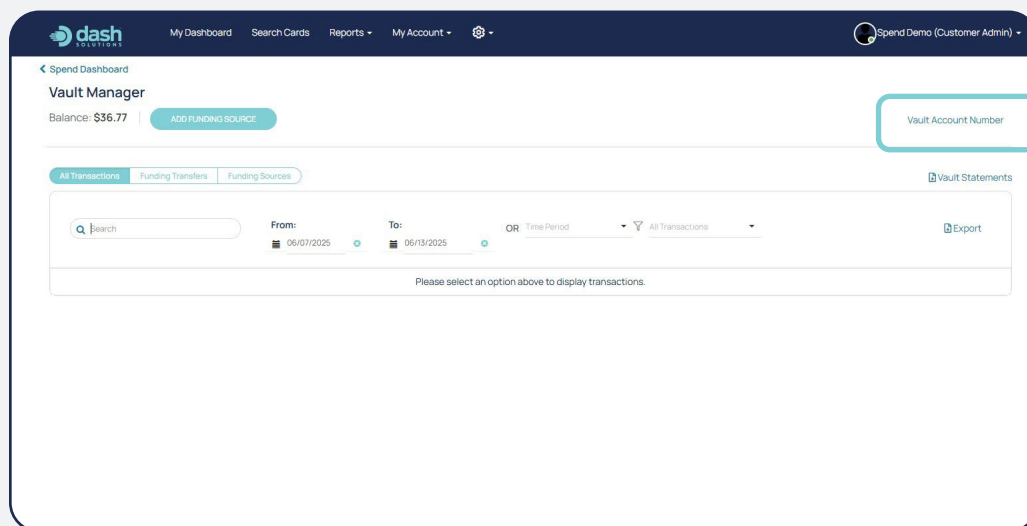
- Cardholder date of birth
- Physical address

	C	D	E	F	G	H	I	J	K	L	M	N
1	name_first	name_middle_init	name_last	name_suff	ssn	dob	Residential Address Line 1	Residential City	Residential State	Residential phone	fourth_line_name_on_c	
2	Spend	One	Demo		123112025	07/27/2000	1234 Spend Demo Street	Birmingham	AL	35209		
3	Demo	Two	Spend		123112026	07/28/2000	1234 Spend Demo Street	Birmingham	AL	35209		
4												

- 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.

dash SOLUTIONS My Dashboard Search Cards Spend Dashboard

ABC Spend Co- Demo

Card Management Vault Manager

Company Vault Balance: \$36.77

How much do you want to move?

\$1.00

FROM: Company Vault \$36.77

TO: BRAD TEST-5332 \$5.00 + \$1.00 = \$6.00

*Click the arrows to switch fields and move money from a card back to vault.

Comment: Business Travel

MOVE MONEY CANCEL

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

dash SOLUTIONS My Dashboard Search Cards Reports My Account Spend Demo (Customer Admin)

Spend Dashboard Back

ABC Spend Co- Demo

Card Management Vault Manager Category Management Bulk Load/ Bulk Unload Team Transactions

Company Vault Balance: \$35.77 Fund Requests: N/A

Roster View: Active Archived

Team Roster Select Card Statuses Export

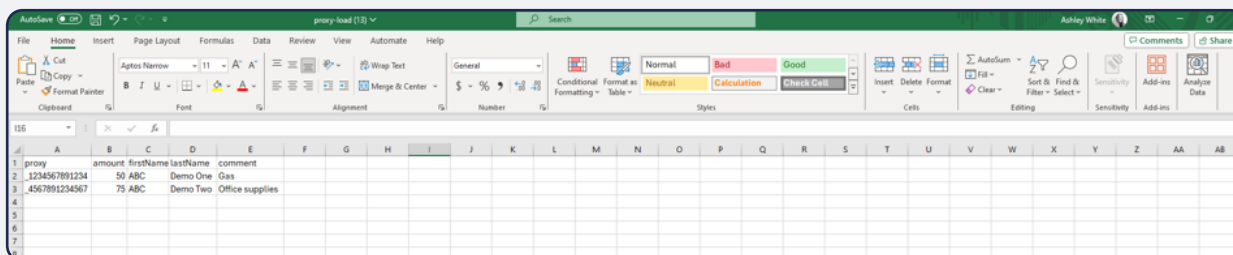
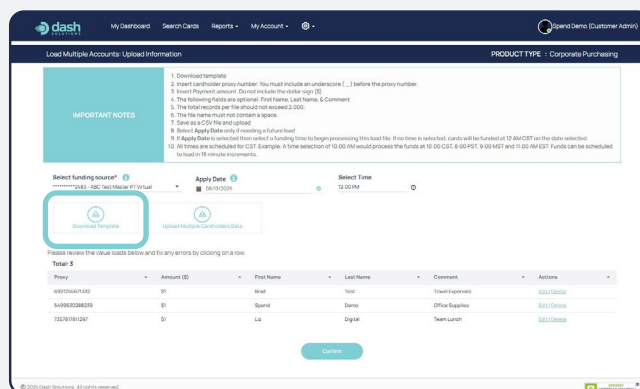
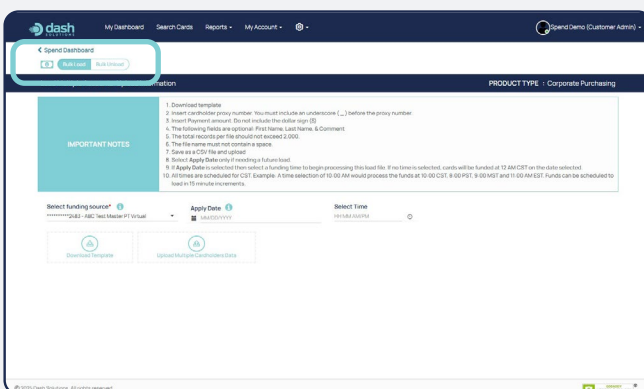
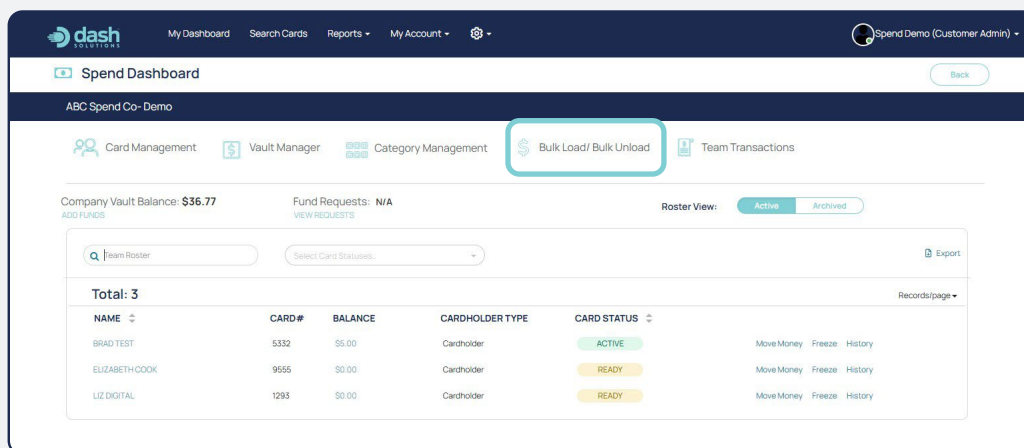
Total: 6

NAME	CARD#	BALANCE	CARDHOLDER TYPE	CARD STATUS	
BRAD TEST	5332	\$6.00	Cardholder	ACTIVE	Move Money Freeze History
ELIZABETH COOK	9555	\$0.00	Cardholder	READY	Move Money Freeze History
LIZ DIGITAL	1293	\$0.00	Cardholder	READY	Move Money Freeze History
SPEND DEMO	3238	\$0.00	Cardholder	READY	Move Money Freeze History
SPEND DEMO	1683	\$0.00	Cardholder	READY	Move Money Freeze History
SPEND DEMO	3206	\$0.00	Cardholder	READY	Move Money Freeze History

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.

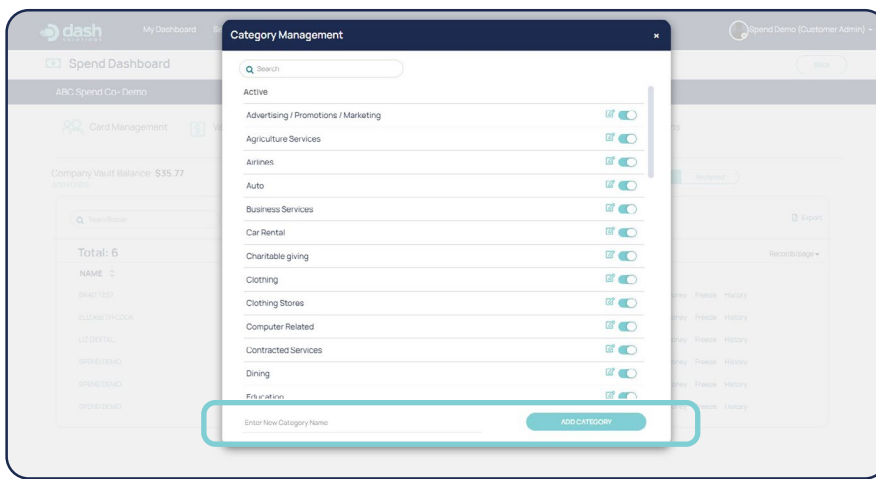


- First/last name and comment columns are optional, but this information may be helpful for reporting purposes.
- Save the file with a unique name and then upload to the Upload Multiple Cardholders Data area. Your file will now be processed. Please note, this could take up to one hour for full completion.

Category Management:

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

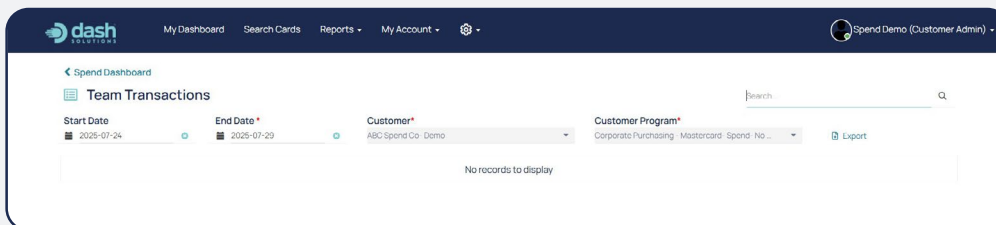
- These categories are automatically enabled but can be disabled by using the associated toggle button. There is also an option to add custom categories for your specific business needs. Categories filter back into business reporting when associated with a transaction.



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.



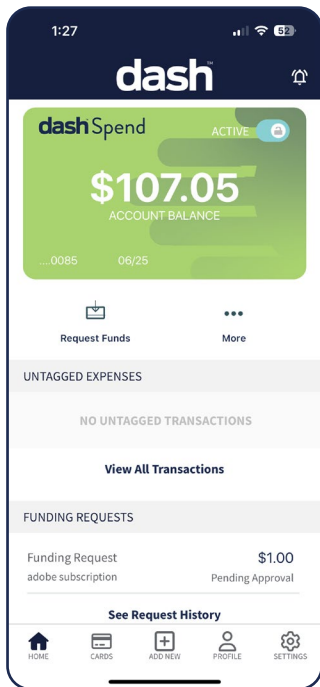
Cardholder	Card Number	Transaction Date	Transaction Amount	Category	MCC Group	Description	Merchant	Merchant Address
TIFFANY	TEST	05/08/2025	-0.84		Retail Outlet Services		K	#
TIFFANY	TEST	05/08/2025	-1.33		Retail Outlet Services			
TIFFANY	TEST	05/05/2025	-3.18	Groceries	Retail Outlet Services		K	#
TIFFANY	TEST	05/05/2025	5					
TIFFANY	TEST	04/15/2025	5					
TIFFANY	TEST	02/28/2025	-14					
BRAD	ELSINGER	02/28/2025	5					
BRAD	TEST	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.

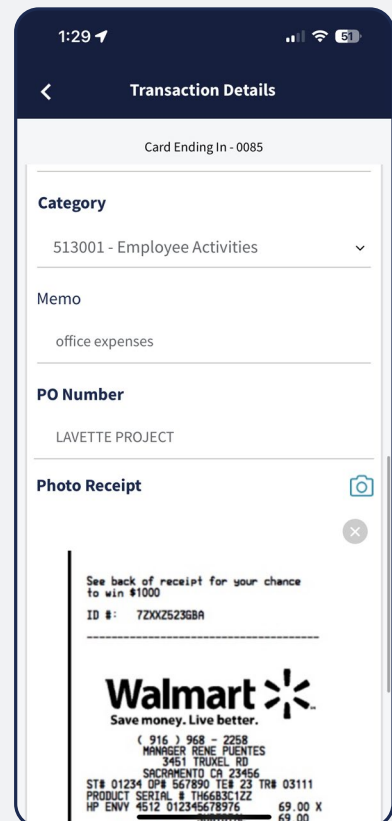
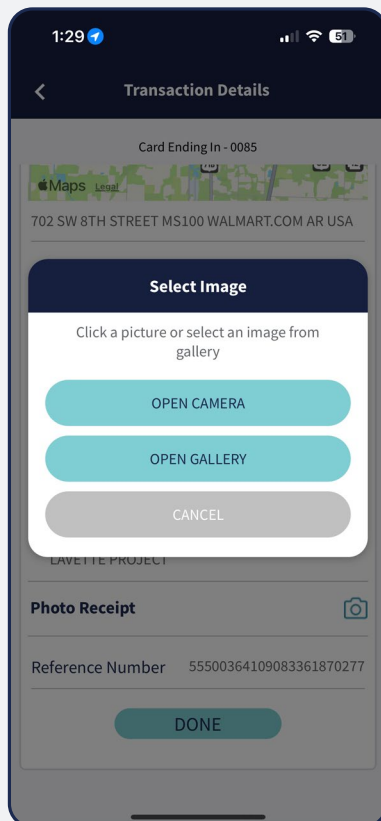
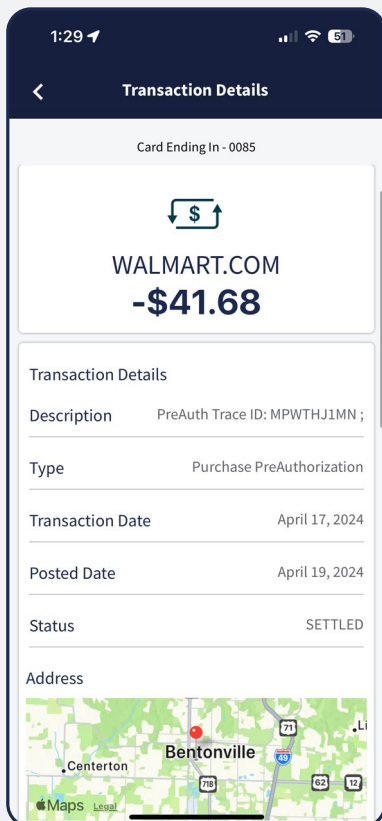


Download the MyDashCard mobile app from the app store OR login at mydashcard.com.



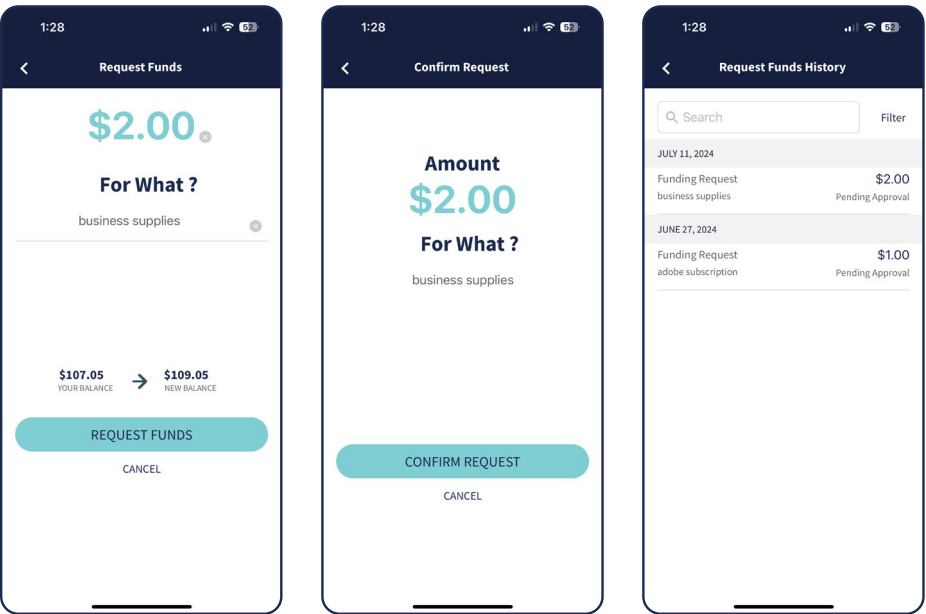
Tag Transactions:

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.

