

Program Administrator Guide
Add A New User



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Add A New User

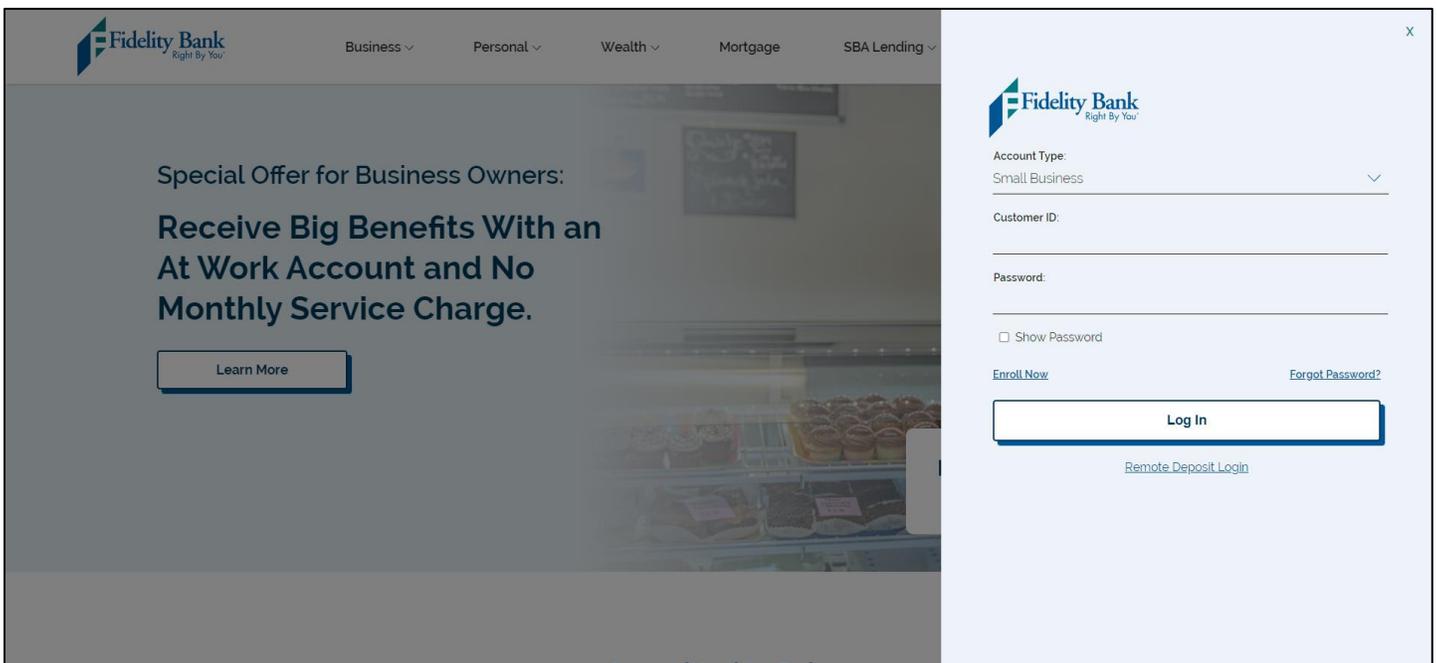


As a Program Administrator (PA), you will manage the entire credit card relationship for your business, including setting up users and controlling and monitoring employee transaction limits. SpendTrack, our new business credit card system, allows you to easily send invitation links to your employees so they can conveniently monitor their card online.

Please use the instructions below to add users to SpendTrack.

| Getting Started

Visit fidelitybanknc.com and log in to Business Advantage or Small Business Online Banking using the same credentials you currently use.



Once logged in, scroll down to the Cards section and click on a card to access SpendTrack.

Cards			
Corporate Total XXXXXXXX5804	Owner FIDELITY BANK	Current Balance COMING SOON	Available Balance COMING SOON

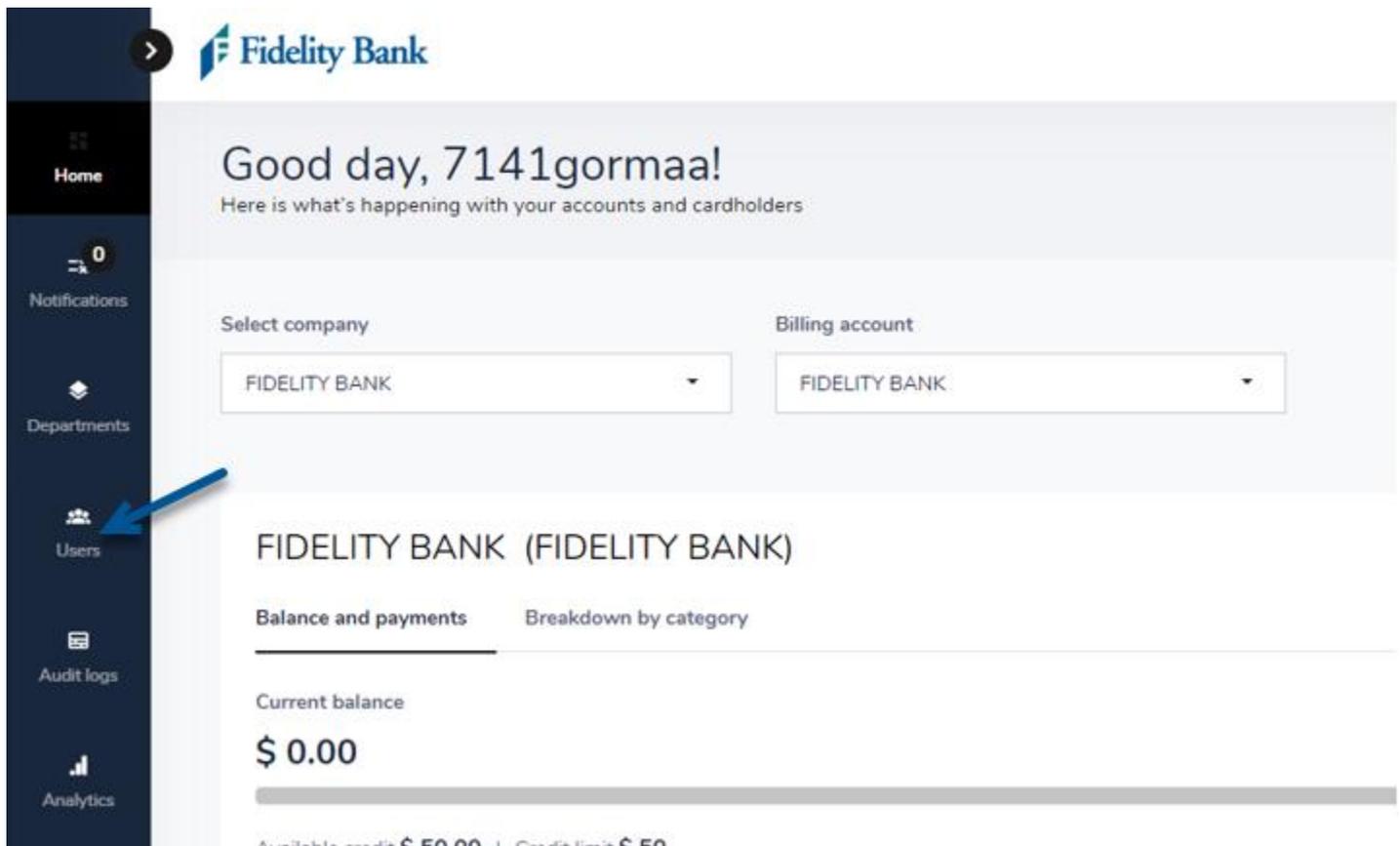
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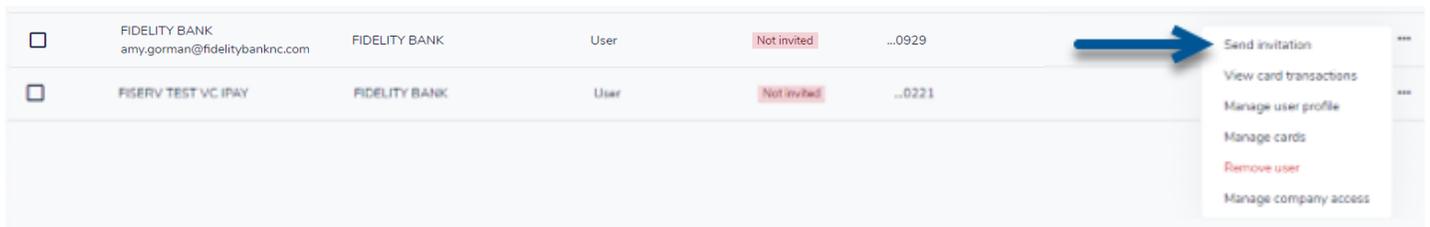


| Invite an Existing Cardholder to SpendTrack

Once you are logged in to SpendTrack, click Users on the navigation menu.



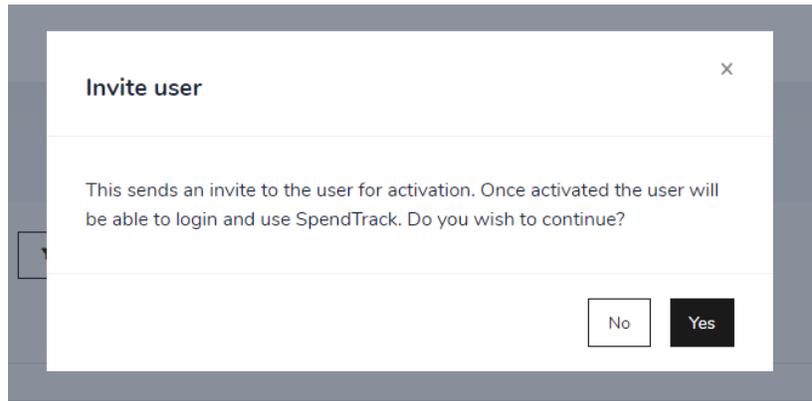
Then, find the user that you would like to send an invitation link to and verify the email address on file is accurate. If it is correct, click on the three dots and select Send invitation. If the email address is not correct or if there is not one on file, review the steps to update user contact information.



A confirmation screen will appear, Click Yes to send an invitation to the user.

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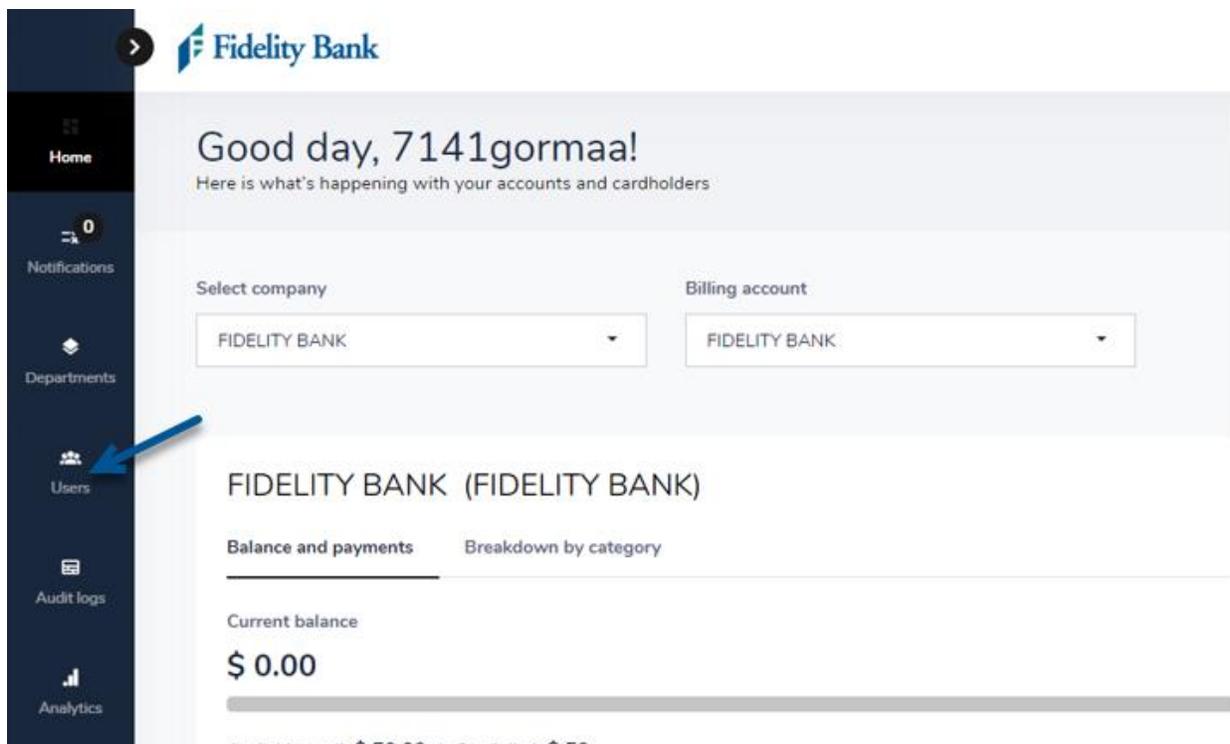


The user will receive an email with set up instructions, an activation link, an activation code, and a SpendTrack link to complete their registration. Users will also be required to set up a password and agree to terms and conditions.

Users will only have access to their own card.

| Invite More Than One Existing Cardholder to SpendTrack

Once you are logged in to SpendTrack, click Users on the navigation menu.



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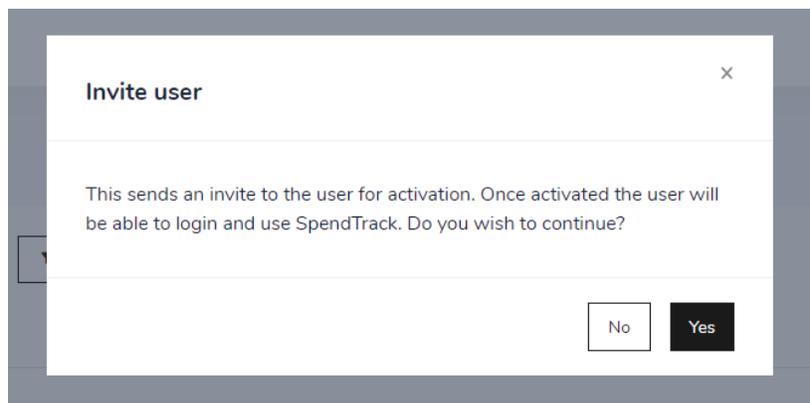


Then, verify the email addresses on file are accurate for the users you'd like to invite to SpendTrack. If they are correct, select the users you'd like to send an invitation link to and click Invite selected. If the email addresses are not correct or if there is not one on file, review the steps to update user contact information.

The screenshot shows the 'Users' management page. At the top right is an 'Add user' button. Below it is a search bar and a 'Filter' dropdown. The 'Invite selected' button is highlighted with a blue arrow. Below the search bar, there are two tabs: 'Users' with a count of 4 and 'Removed' with a count of 0. A table lists users with columns for Name, Department, Role, Status, Card ending, Employee ID, and Actions. Two users are selected with checkboxes, and their status is 'Not invited'.

<input type="checkbox"/>	Name	Department	Role	Status	Card ending	Employee ID	Actions
<input type="checkbox"/>	Amy Gorman amy.gorman@fidelitybanknc.com	FIDELITY BANK	Program administrator	Active			...
<input type="checkbox"/>	Amy Gorman aimster_346@yahoo.com	FIDELITY BANK	Program administrator	Active			...
<input checked="" type="checkbox"/>	FIDELITY BANK	FIDELITY BANK	User	Not invited	...0929		...
<input checked="" type="checkbox"/>	FISERV TEST VC IPAY	FIDELITY BANK	User	Not invited	...0221		...

A confirmation screen will appear, Click Yes to send an invitation to the user.



The user will receive an email with set up instructions, an activation link, an activation code, and a SpendTrack link to complete their registration. Users will also be required to set up a password and agree to terms and conditions.

Users will only have access to their own card.

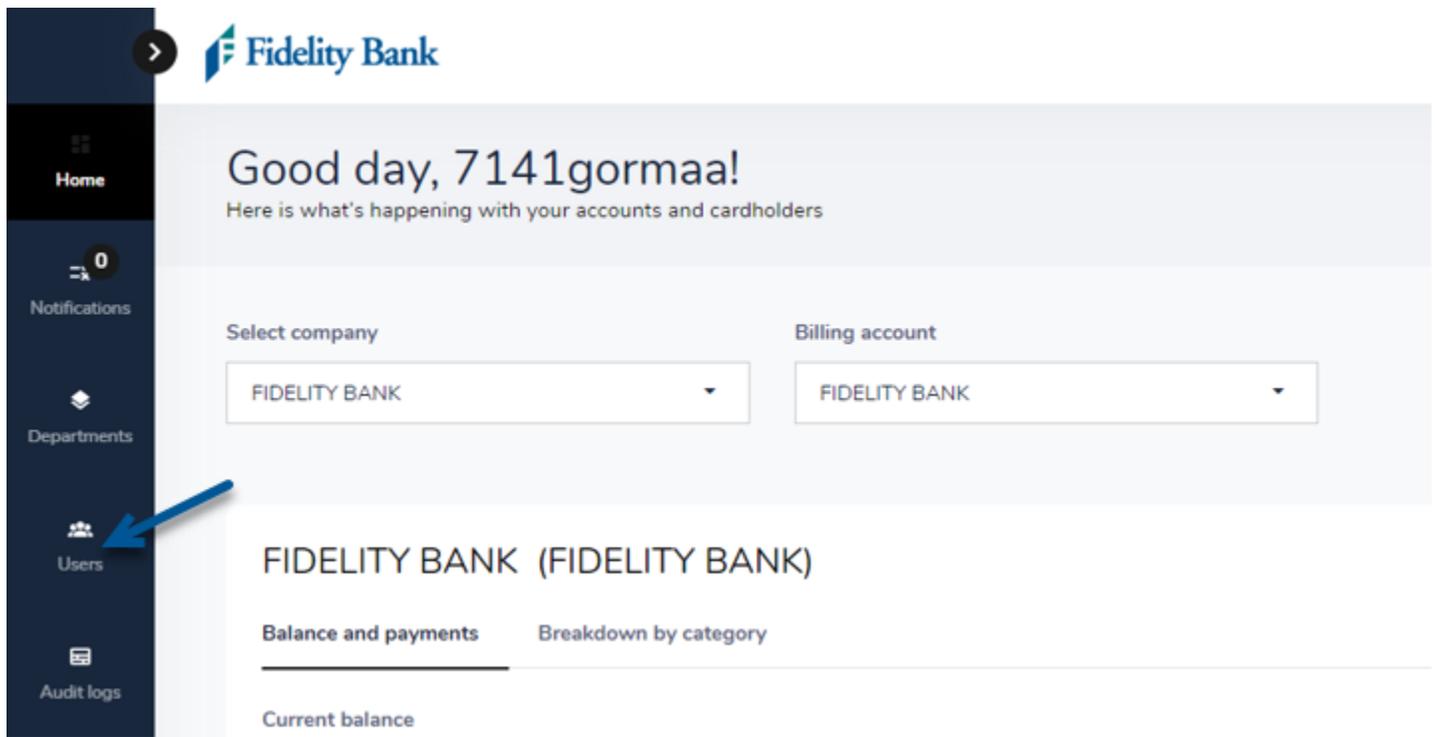
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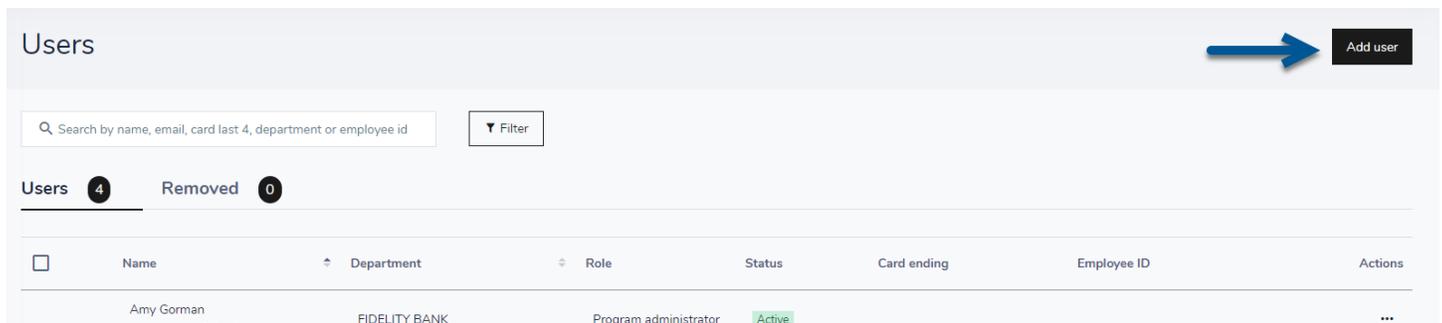


| Add a New User to SpendTrack

Once you are logged in to SpendTrack, click Users on the navigation menu.



Then, click the Add user button.



Next, complete the required fields for the new user, select the appropriate role, and click Add and invite user.

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Add user

Email address *
steve.mcclure@fidelitybanknc.com

First name *
Steve

Last name *
McClure

Cell phone number
() - - - -

Home phone number
() - - - -

Work phone number and extension
() - - - -

Select role *
Reporting administrator

Select department profile *
Select department

Add user Add and invite user

Once you have added the new user, you can order a credit card for them. Click on the three dots and click Manage cards.

Users Add user

Search by name, email, card last 4, department or employee id Filter

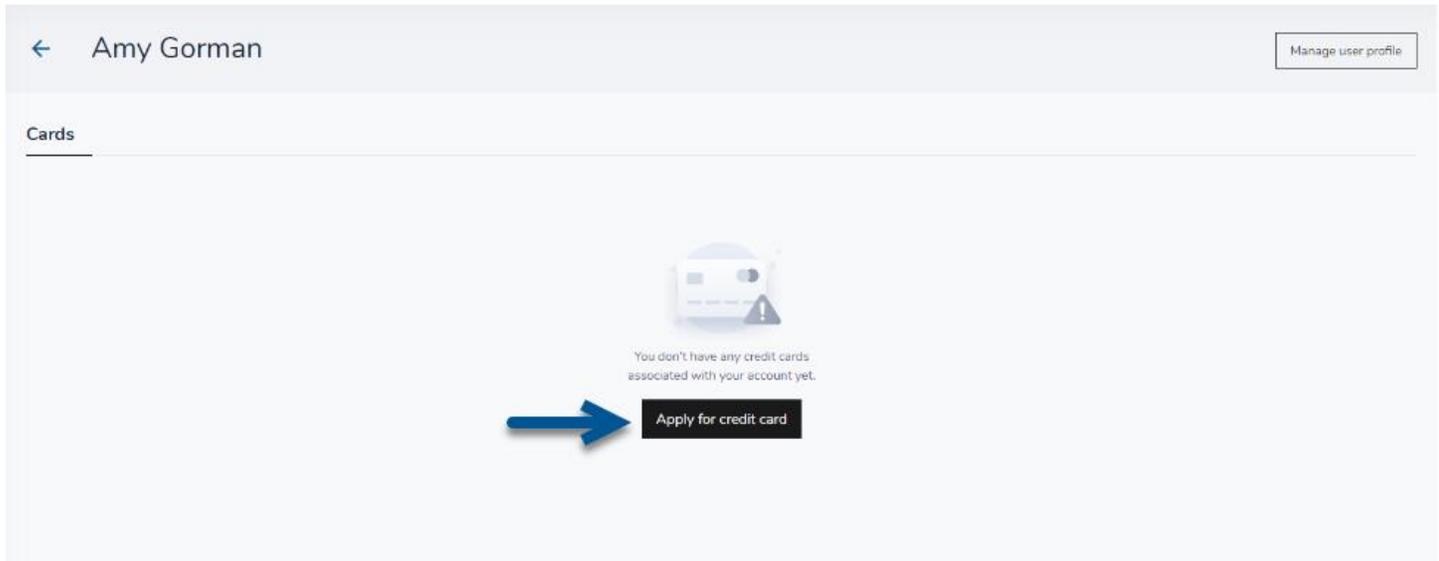
Users 4 Removed 0

<input type="checkbox"/>	Name	Department	Role	Status	Card ending	Employee ID	Actions
<input type="checkbox"/>	Amy Gorman amy.gorman@fidelitybanknc.com	FIDELITY BANK	Program administrator	Active			...
<input type="checkbox"/>	Amy Gorman	FIDELITY BANK	Program administrator	Active			...
<input type="checkbox"/>	FIDELITY BANK amy.gorman@fidelitybanknc.com	FIDELITY BANK	User	Not invited	..0929		Reset password Manage user profile Manage cards Disable user Remove user Manage company access
<input type="checkbox"/>	FISERV TEST VC IPAY	FIDELITY BANK	User	Not invited	..0221		...

Then, select Apply for credit card.

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Follow the on-screen prompts to order a card for the user.

New card application x

- **Personal information**
- Contact information
- Card settings
- Terms and Conditions

First name *

Last name *

Middle initial

Email

Tax id type *

Social security# *

Date of birth *

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| Update User Contact Information

If a user's email address is not correct or if there is not one on file, click on the three dots and select Manage user profile.

<input type="checkbox"/>	FIDELITY BANK amy.gorman@fidelitybanknc.com	FIDELITY BANK	User	Not invited	...0929	...
<input type="checkbox"/>	FISERV TEST VC IPAY	FIDELITY BANK	User	Not invited	...0221	...

- Send invitation
- View card transactions
- Manage user profile
- Manage cards
- Remove user
- Manage company access

Then, click Update contact information.

FIDELITY BANK
View and update user information here Manage cards

Profile information

Personal information Update personal information

First name	Last name FIDELITY BANK	Date of birth ----	SSN / Tax ID ----
Employee ID ----	Department FIDELITY BANK	Department manager Amy Gorman	User role User

Contact information Update contact information

Email ----	Cell phone number ----	Home phone number +1 (919) 552-2242	Work phone number & extension +1 (919) 552-2242
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Remove user Permanently remove user from this company.

Add or update the contact information, select the card(s) that the contact information should be added to, and select Save and close to save your changes.

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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 *

Cell phone number

Home phone number

Work phone number and extension

Apply this update to cards
Remember this information can be used for purposes such as receiving paperless statements.

<input type="checkbox"/>	Cards	Account type	Exp date	Status
<input type="checkbox"/>	 ...0929	ControlAccount	07/2025	Active



To learn more about our SpendTrack system, view our demo at fidelitybanknc.com/cardupgrade.

| Have Additional Questions?

If you have additional questions or have difficulty with this system update, please call our Credit Card department at 1-855-547-1385 and select option five for assistance.