Program Administrator Guide

Add A New User

Fidelity Bank
Right By You®

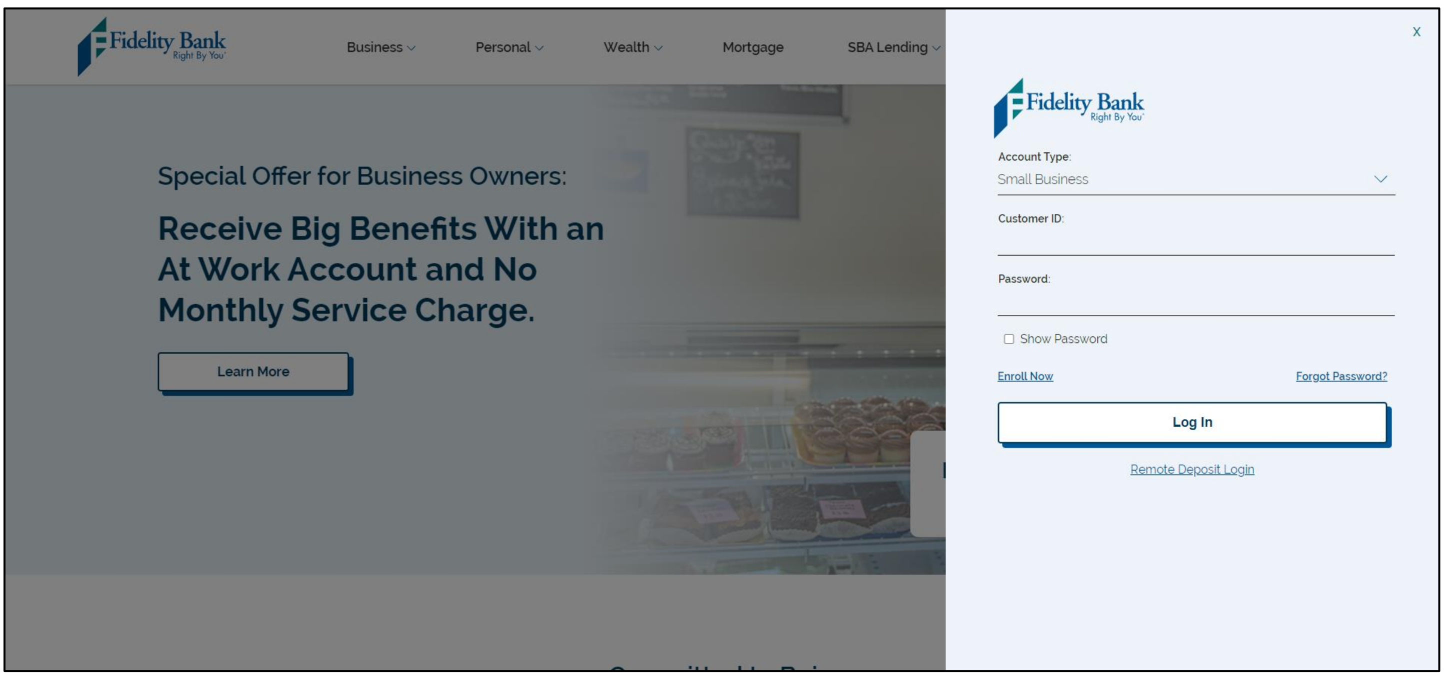
Rev. 8/2024

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.

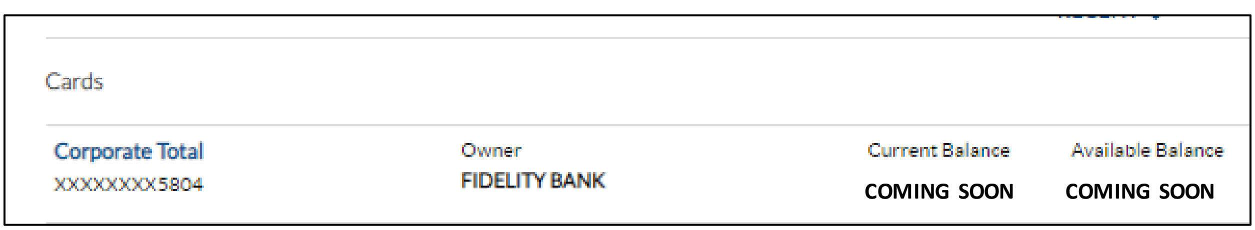
Please use the instructions below to add users to SpendTrack.

Getting Started

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

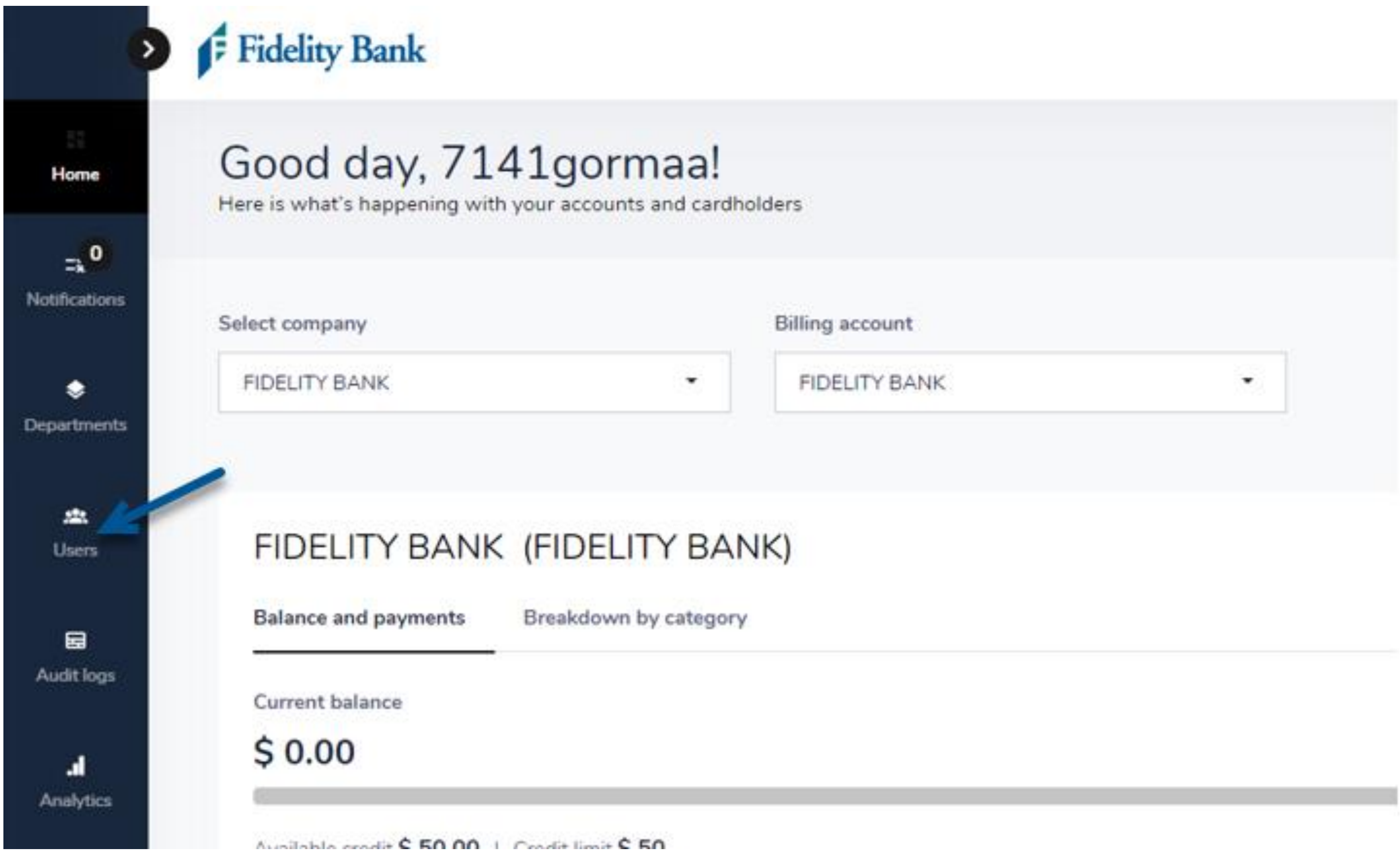


Once logged in, scroll down to the Cards section and click on a card to access SpendTrack.

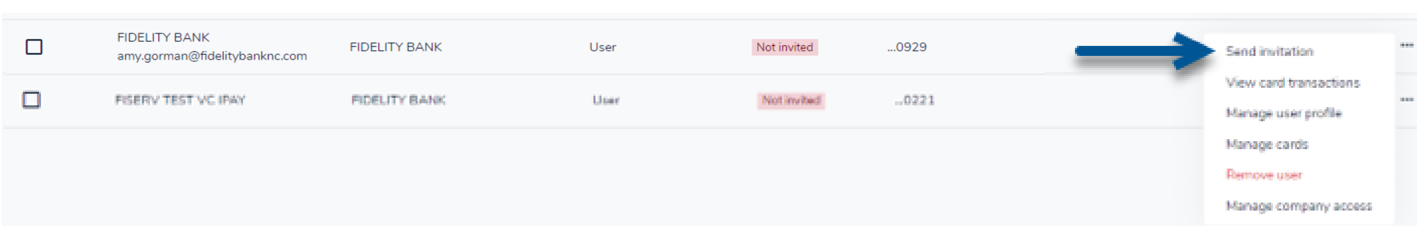


Invite an Existing Cardholder to SpendTrack

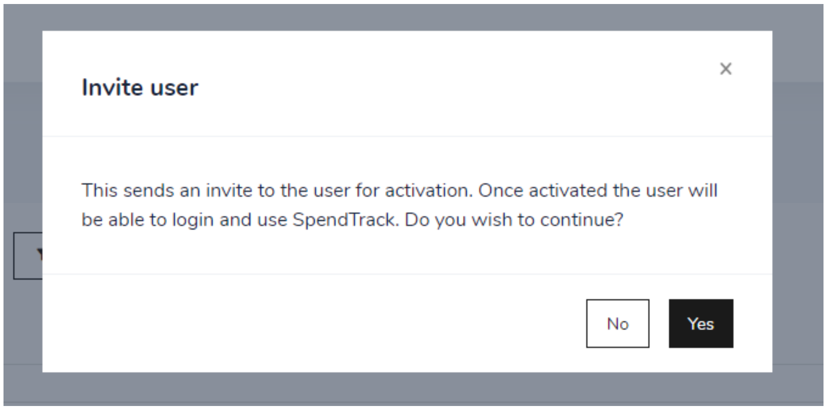
Once you are logged in to SpendTrack, click Users on the navigation menu.



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.

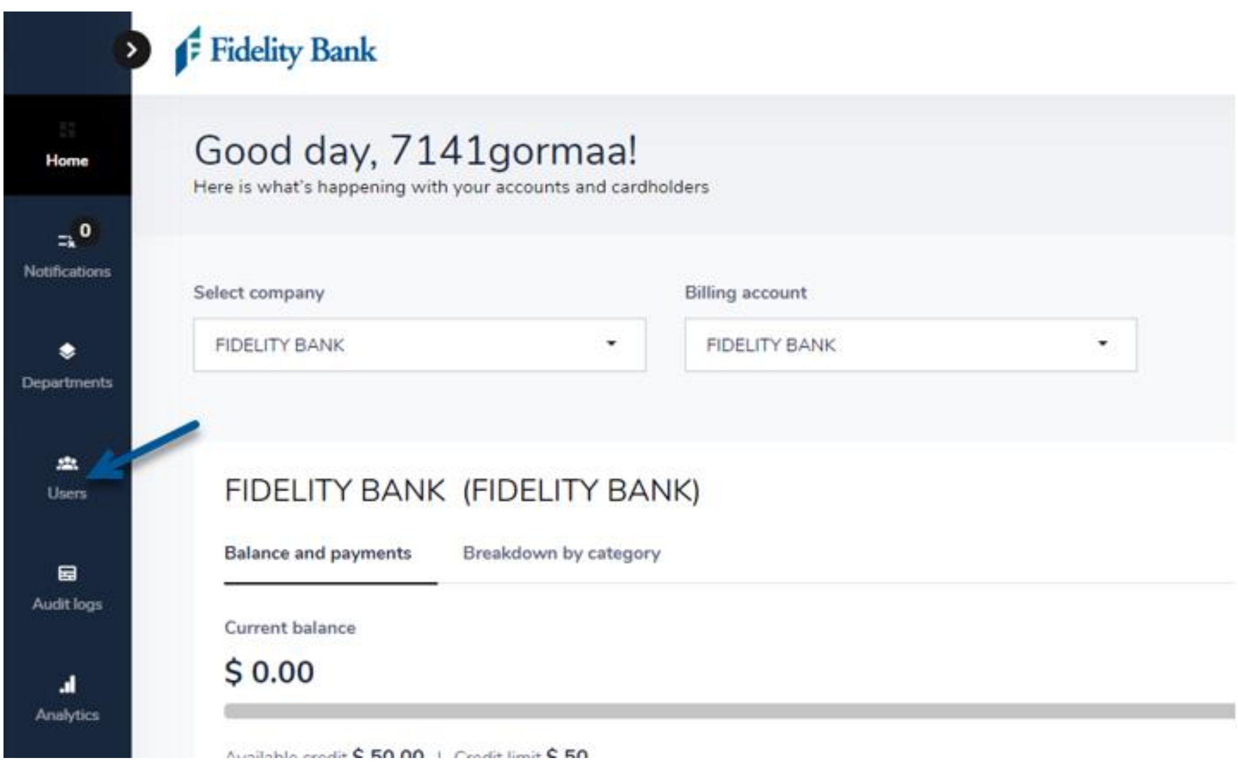


The user will receive an email with set up instructions, an activation link, an activation code, and a SpendTrack link to complete their registration. Users will also be required to set up a password and agree to terms and conditions.

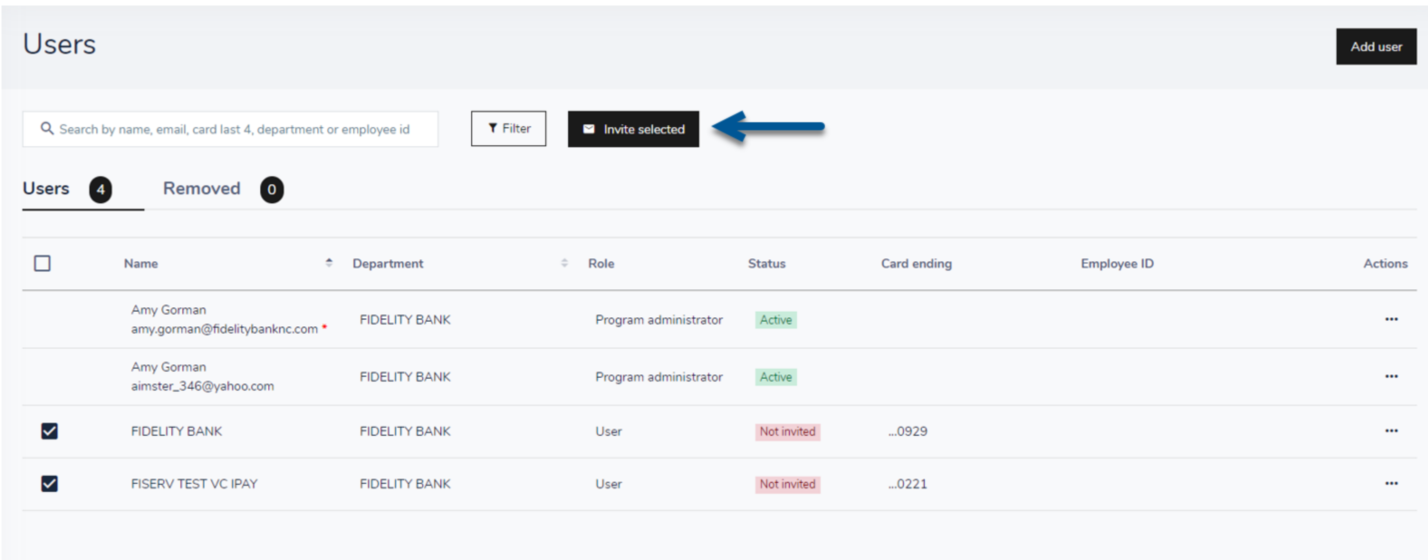
Users will only have access to their own card.

Invite More Than One Existing Cardholder to SpendTrack

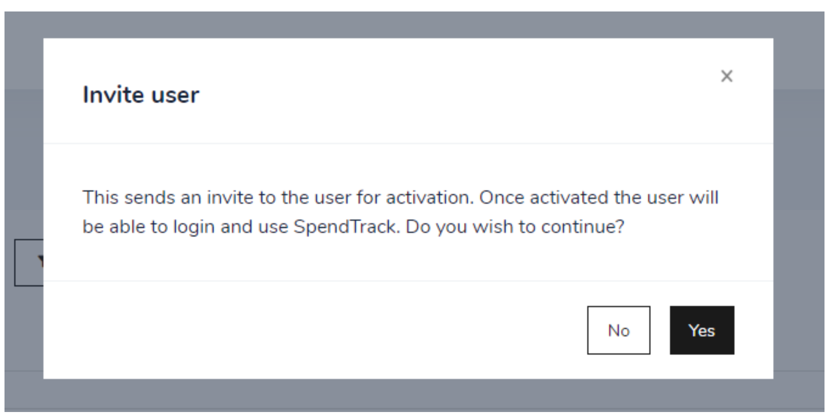
Once you are logged in to SpendTrack, click Users on the navigation menu.



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.



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

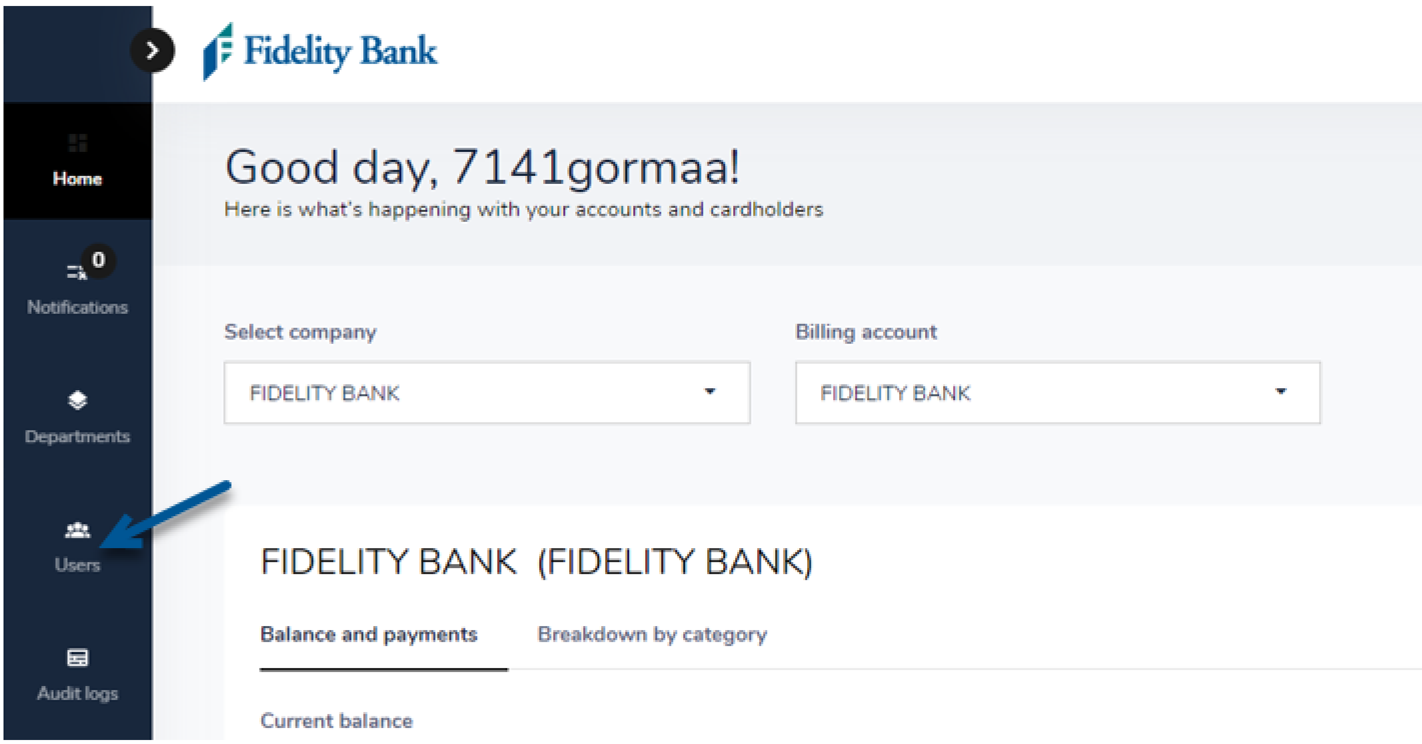


The user will receive an email with set up instructions, an activation link, an activation code, and a SpendTrack link to complete their registration. Users will also be required to set up a password and agree to terms and conditions.

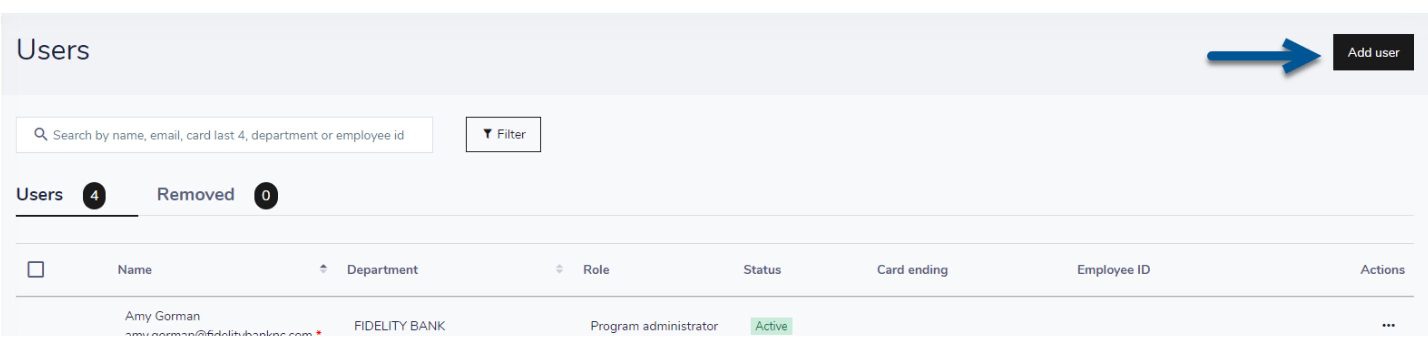
Users will only have access to their own card.

Add a New User to SpendTrack

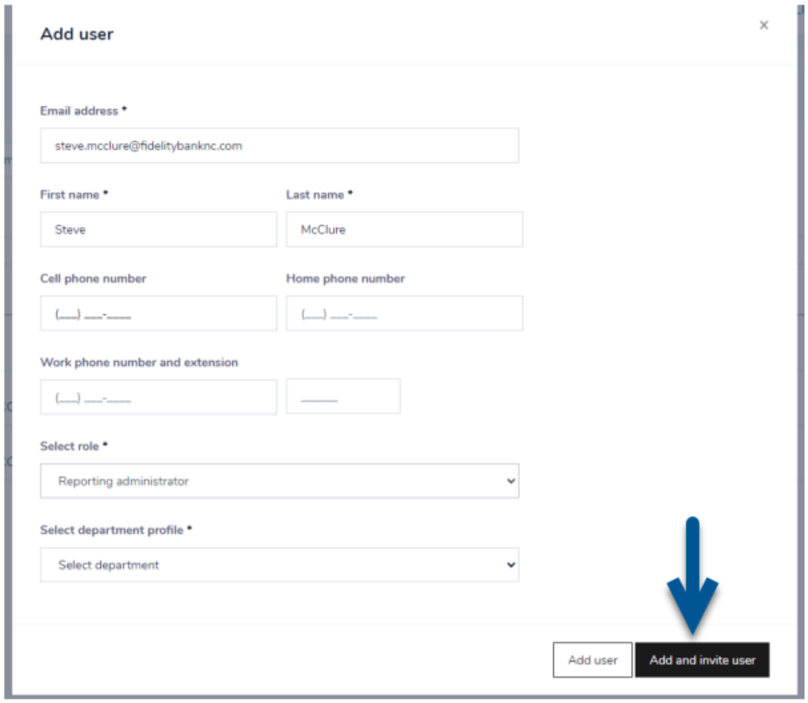
Once you are logged in to SpendTrack, click Users on the navigation menu.



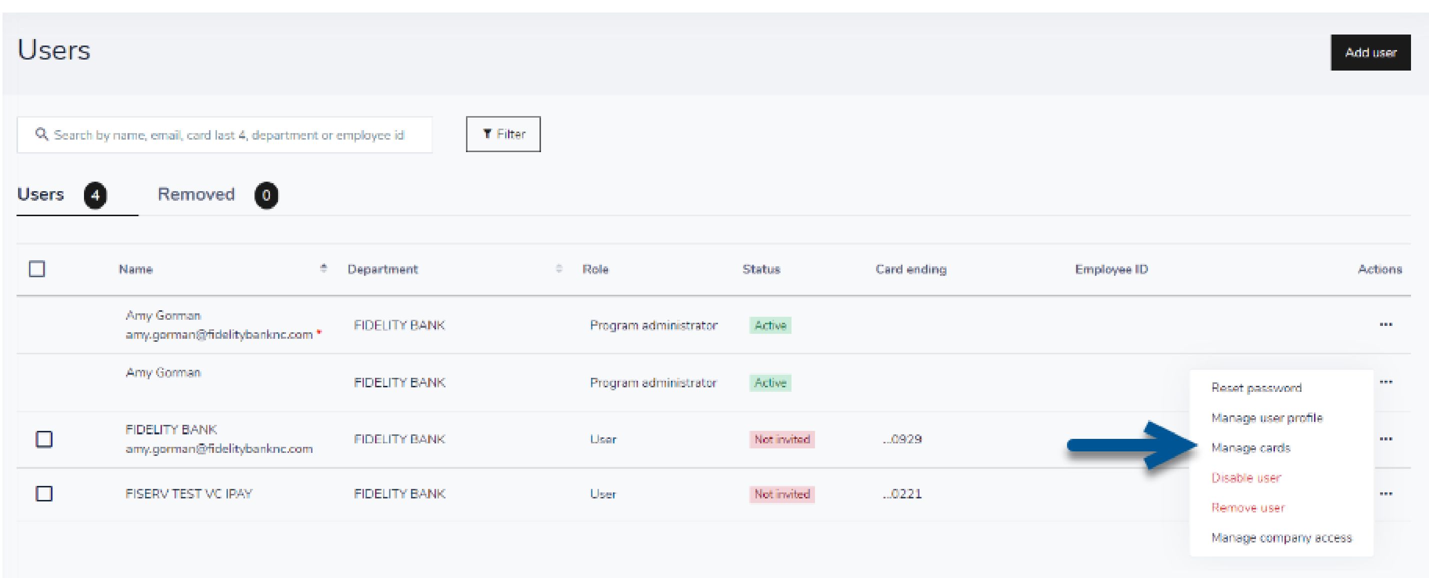
Then, click the Add user button.



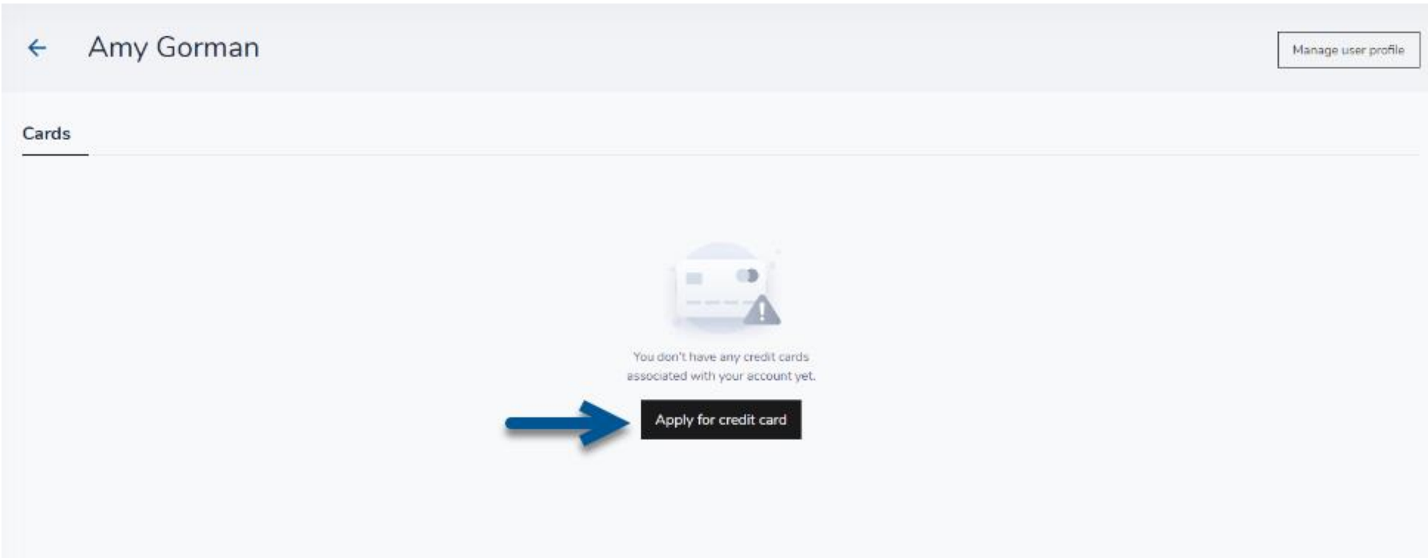
Next, complete the required fields for the new user, select the appropriate role, and click Add and invite user.



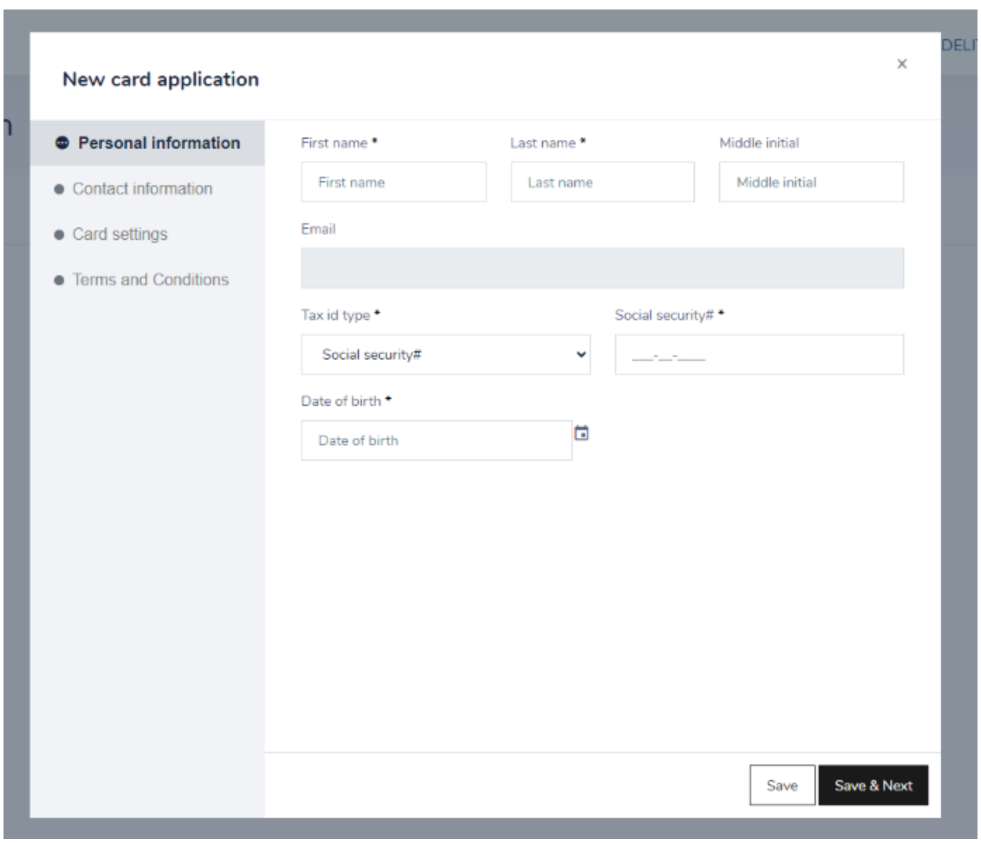
Once you have added the new user, you can order a credit card for them. Click on the three dots and click Manage cards.



Then, select Apply for credit card.

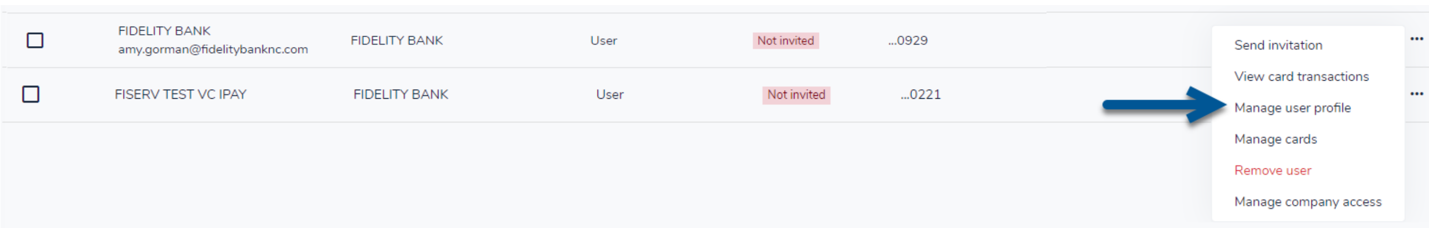


Follow the on-screen prompts to order a card for the user.

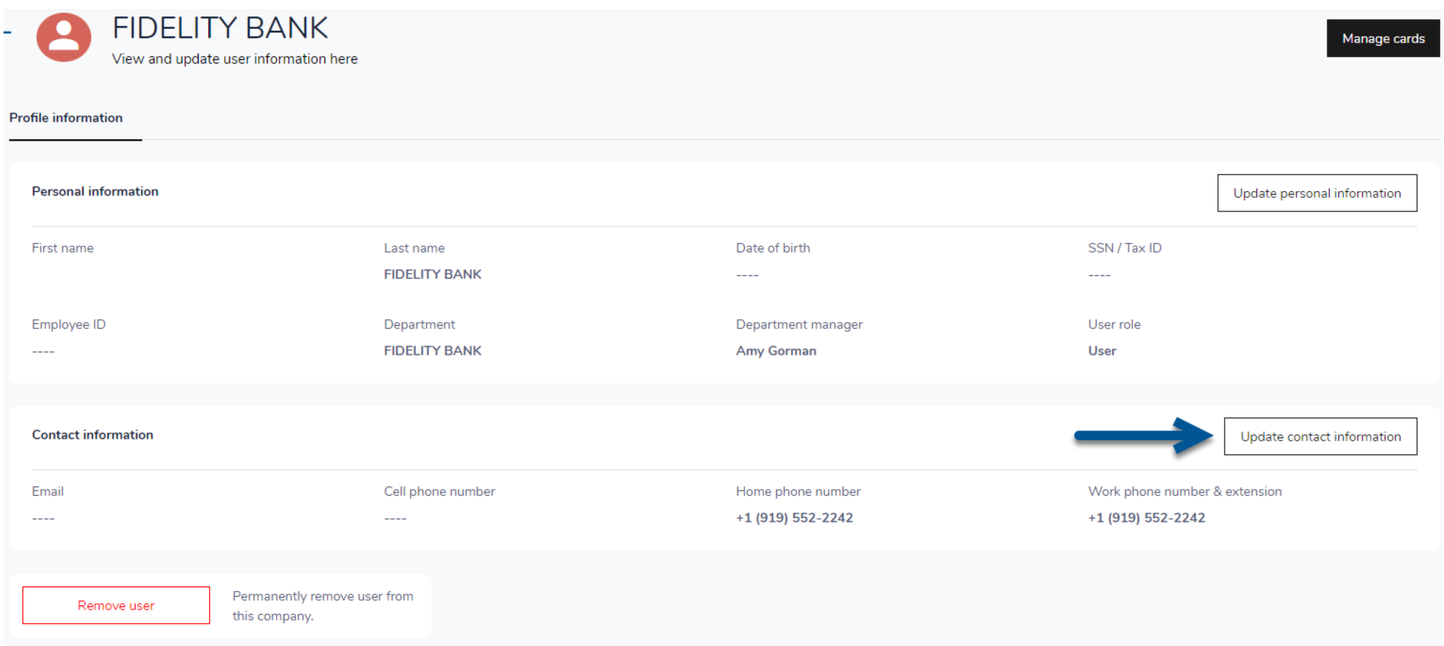


Update User Contact Information

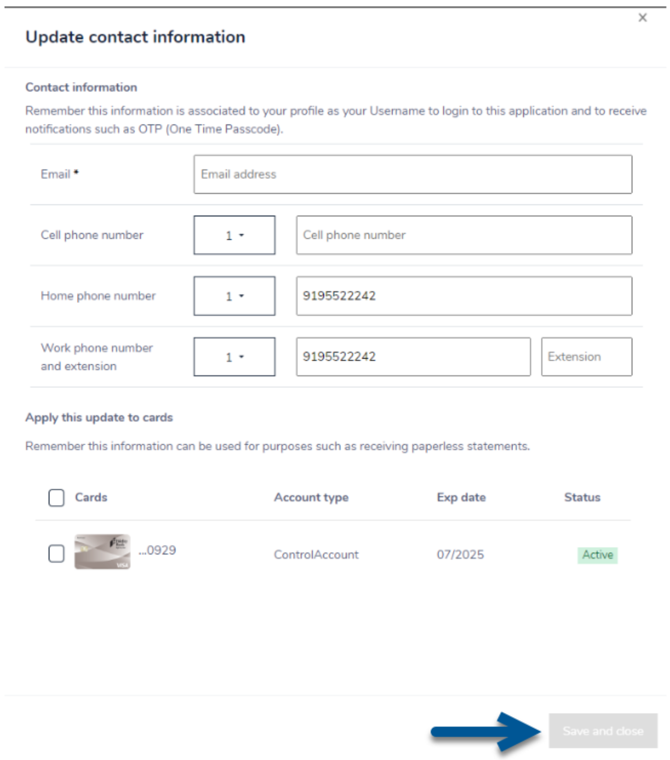
If a user's email address is not correct or if there is not one on file, click on the three dots and select Manage user profile.



Then, click Update contact information.



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.



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