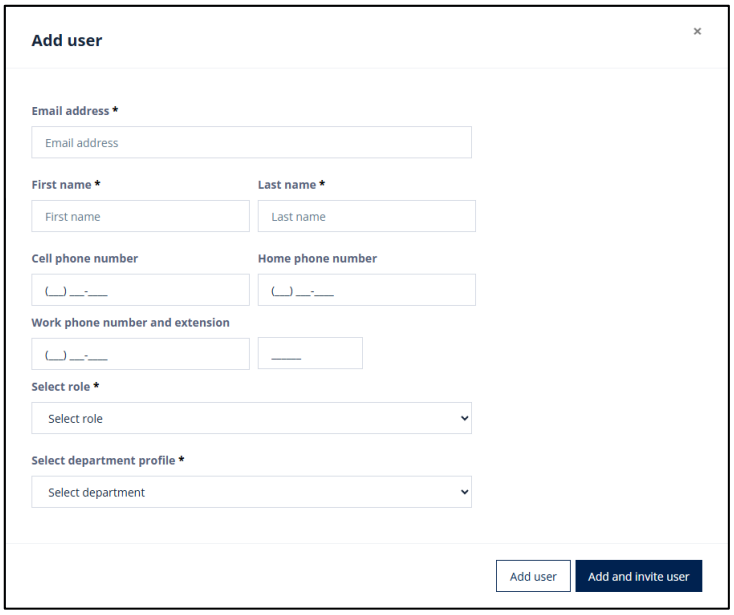
Create a New User

Administrators can create new users, which is the first step in ordering a new card.

From the navigation pane, select **Users** → **Add User**.

1. Enter the **Email address**
2. Enter **first and last name**
3. The **cell and home phone numbers** are not required fields but will be needed for the cardholder to receive text messages concerning possible fraud or to confirm transactions.
4. Select the **role** the user should have, either Program Administrator, Reporting Administrator, or User.
    a. Program Administrator: Can review and maintain cards for the company and can make changes and payments for the company.
    b. Reporting Administrator: Can review the entire company and cards but cannot make changes.
    c. User: Can only view the cards they are assigned and have limited maintenance access (i.e. turning the card off).
5. Select the **department** profile if you have departments set up.
6. Click **Add and invite** user. This will generate an email to the user so that they are able to complete the enrollment process.

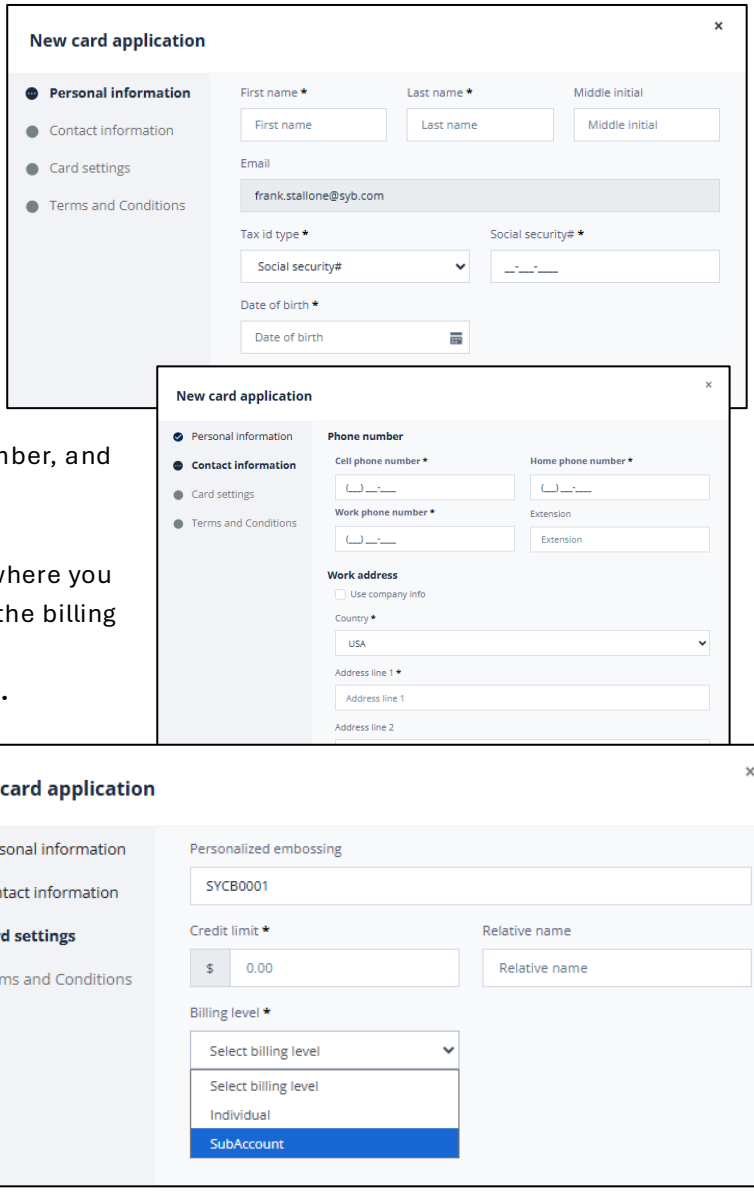


Note: If you are just ordering a card without granting access to SpendTrack, only select **Add User** so that an email *will not be generated* to the cardholder.

Add New Card

After the user is created:

1. From the list of users, click on the user name, and select **Manage Cards.**
2. Select **Apply for Credit Card.**
3. Enter the **Name, Email, Tax ID (Business EIN),** and **Date of Birth.**
4. Select **Submit** on the New card Application window.
5. Click **Save & Next.**
6. Enter **Contact Information**. This includes the business mailing/billing address, work phone number, and mobile number for fraud alerts and notifications.
7. Click **Save and Next.**
8. Next is the Personalized embossing area. This is where you will establish an individual credit limit, as well as the billing level (see Billing Levels below).
9. After selecting the Billing level, Click **Save & Next.**
10. Click the **View Terms and Conditions** box and select that you have read and **Agree** to the terms and conditions.
11. Select **Submit.**



Billing Levels:

- **Individual**: This indicates that the cardholder should be billed through individual billing.
- **SubAccount**: This ensures that the cardholder should be billed through corporate billing. This is the most common billing level used. Please contact Stock Yards Bank Card Services at (502) 625-9955 with any questions regarding this selection.

Note: Submitting this form begins the card creation process. After the card is created it can be seen on the Homepage.