Spend Control

Adding Additional Program Administrators

Adding an Additional Corporate Card Program Administrator

For audit purposes, if additional users need administrative access to Spend Control, an existing Program Administrator within the company must set them up. Below you will find the two Administrator role types available as well as step-by-step instructions on how to add this access.

Spend Control Administrator Role Options

Option #1: Program Administrator: Full access to Spend Control and Call Center

- Add new cardholders.
- Maintain existing cardholders (update credit limits, address, etc.).
- Access reporting for entire company.
- Create new Spend Control Users/Level Managers/Admins.
- Reset Spend Control passwords for Users and fellow Admins.
- Can be listed on the ‘Authorized to Call’ list the Call Center and Bank refers to on who is able to speak on behalf of cardholders regarding fraud, declines, etc. as well as make card program changes. Please see instructions on page 4 on how to grant Call Center access.
- Make a Payment towards the Corporate Balance.

Option #2: Read-only Program Administrator: Company level No Account Maintenance access

- Access reporting for all cardholders in entire company.
- Review cardholder declines.
- View cardholder Expense Reports.
- Reset Spend Control passwords for Users and fellow Admins.

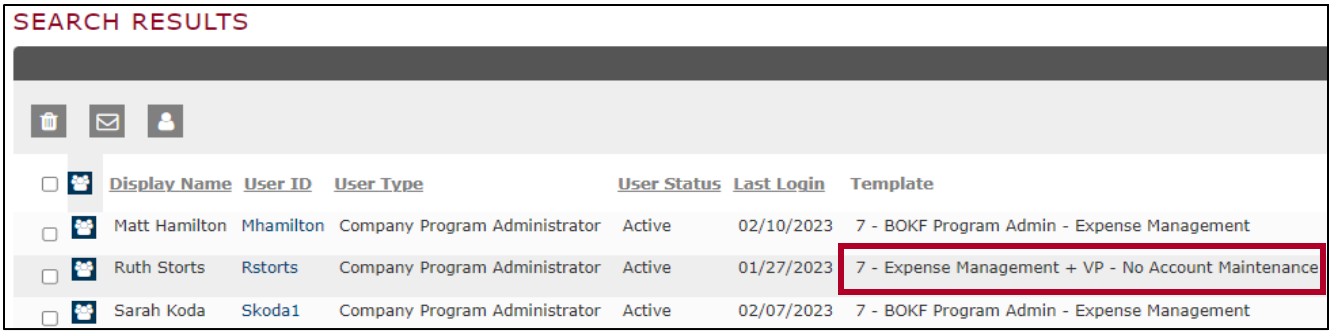
Instructions to Grant Administrative Access to Spend Control

Before getting started, we highly recommend checking for a few pieces of information that will be helpful when adding your new Administrator.

Step 1: Check to see if this individual already has access to Spend Control – as a Cardholder User or Level Manager for example. You can add a role to someone that has existing access to avoid creating multiple username/passwords. To check for existing access, go to User > User Summary > Search > scroll to locate user access. Please note there may be multiple pages.

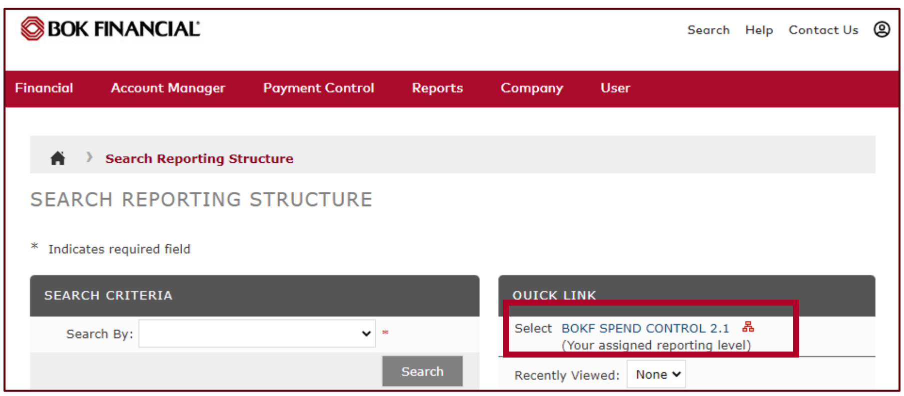
Step 2: Check to see if there is an existing person, including yourself, that you would like the new Admin access to mirror. In order for your new admin to have appropriate access, the correct Template will need to be selected. You will want to look for the Program Option Template they have applied.

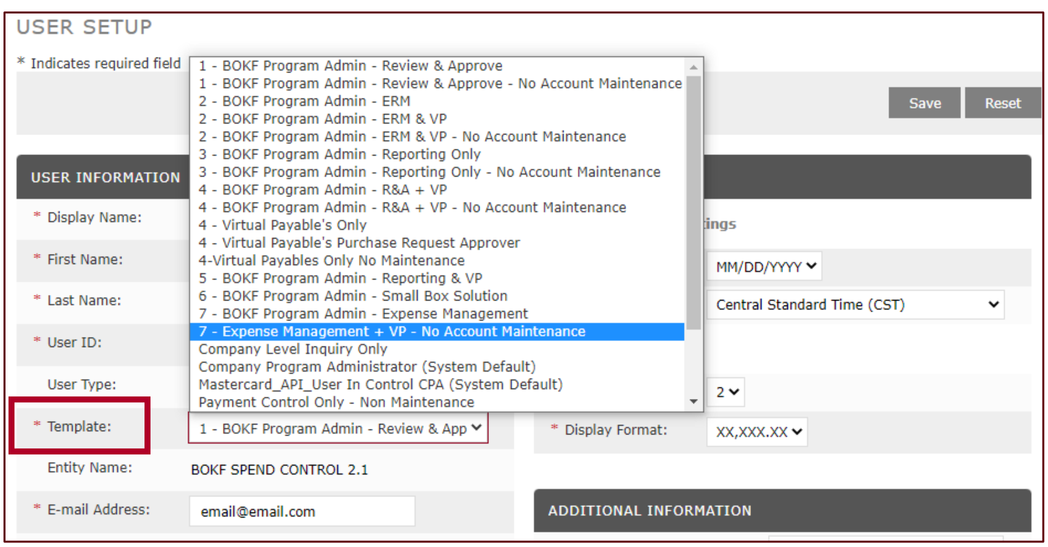
To see what Template you need to select, go to User > User Summary > Search > Locate your profile, or the individual you would like to mirror and look under the Template field here:



To Grant Access to New Admin with <u>no</u> existing Spend Control access:

Go to User > User Setup > Under Quick Links section, click on your Company Name (blue hyperlink).





Complete all required fields and create "username".

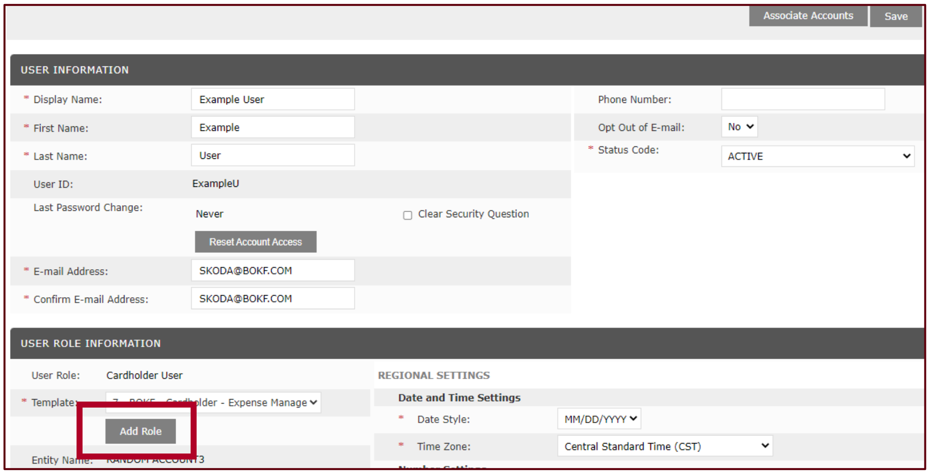
Most importantly, select "Template" that matches your Admin access or the individual you would like to mirror.

Please note: if you would like to apply the read-only Admin access, select the template that states "No Account Maintenance".

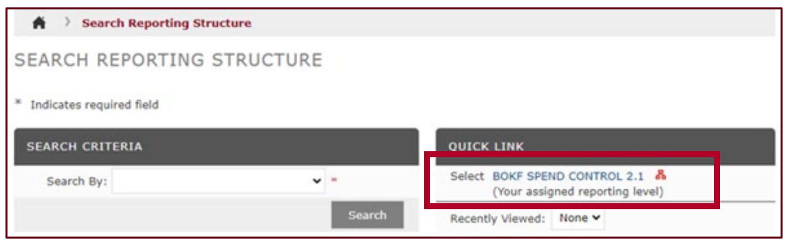
Not sure what Template to select, please reach out to us at corporatecardsupport@bokf.com

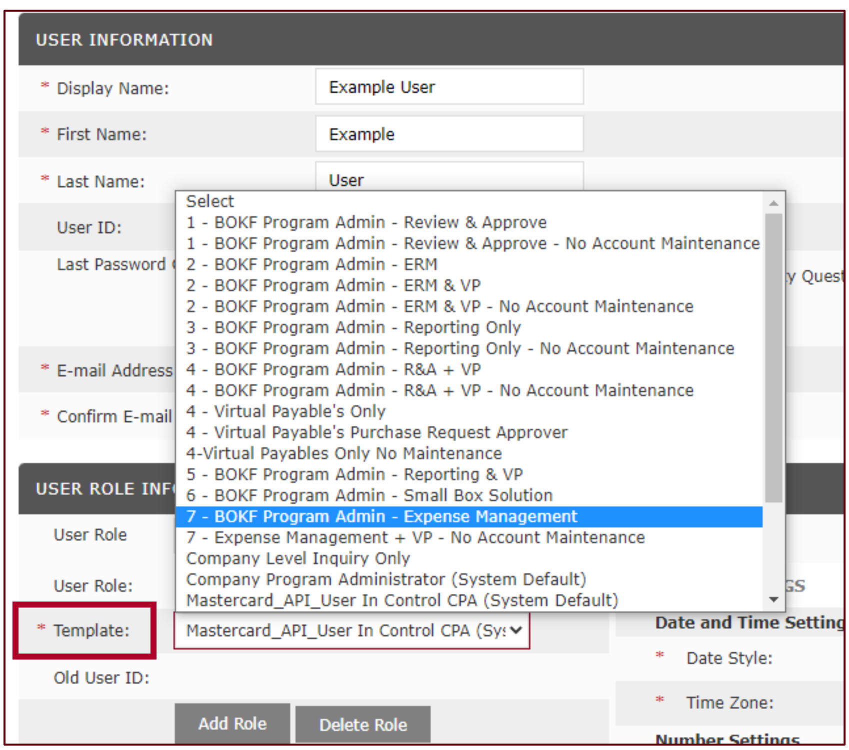
To Grant Access to New Admin with existing Spend Control access:

Go to User > User Summary > Search > Locate and select the existing username > Click "Add Role" button.



Under Quick Links section, click on your Company Name (blue hyperlink).





Now, most importantly, change the Template to match your Admin access or the individual you would like to mirror > Click "Save".

Please note: if you would like to apply the read-only Admin access, select the template that states "No Account Maintenance".

Not sure what Template to select, please reach out to us at corporatecardsupport@bokf.com

Granting Call Center Access – Full Program Administrators Only

Adding Administrative access to Spend Control will not automatically add the individual to the 'Authorized to Inquire' contact listing the Call Center refers to.

Please have an existing Program Administrator send an email request to CorporateCardSupport@bokf.com and provide the following information:

- Please indicate in the "Subject" of the email that this is a request to give full Program Administrative access at the Call Center.
- Provide contact information for the new Program Administrator.
    - First and Last Name
    - Direct Phone Number
    - Email Address

Note: It can take up to 3 business days for new Administrator to be added as a Call Center contact.

Once request has been submitted, please share the following information with the new Administrator as this information will be required to validate identity with the Call Center:

- 9-digit Corporate Tax-ID
- Corporate zip code
- 4-digit Admin Security Code (same code shared by all admins)

Access the BOK Financial Program Administrator Guide located on our User Guide page here.

If you have any questions, please feel free to contact us at corporatecardsupport@bokf.com.