Spend Control

New Cardholder Request

Spend Control – Adding Cardholders

Account Manager > New Account Setup

Complete the required fields with the red asterisks

- **Company Number:** Do not modify this field.
- **Hierarchy Levels:** Do not modify this field.
- **Name 1:** Must be in the following format: John*Smith or John A*Smith.
- **Name 2:** Not required. Will default to company name.
- **Correspondence Address:** **Required** – Best practice is to use the business address.
- **Date of Birth:** **Required** – Should be in the following format: 01/01/1900.
- **SSN:** Last 4 digits required. Must be in the following format: 000001234.
- **Employee ID:** Not required.
- **Cash Advance Limit:** Not required. This function is generally disabled.
- **E-mail Address:** Not required.
- **Home Phone Number:** **Required** – This should be the cell number of the cardholder, format: 1234567890.
- **Work Phone Number:** Not required.
- **Accounting Code:** Not required.
- **Credit Limit:** **Required** – Format: 1000.
- Click “Submit”. You will be taken to a confirmation screen.
- Review for errors and click “Submit” again.

Fleet and Sub Account Customers

Customers requesting cards requiring prompts for odometer and or Fleet code follow a different process. In addition, customers requesting cards linked to sub accounts follow a different process.

- Send in requests through Cardholder Upload Excel template used in past requests.
- Email CorporateCardSupport@bokf.com for additional help.

Ordering more than 5 new cards

- Email corporatecardsupport@bokf.com for a Cardholder Upload Excel template for faster entry.
- Do not use this process to replace an account that has fraudulent activity.
    - Contact the call center immediately if unauthorized activity is on the account 1-877-468-6115. For Program Administrators, you will need the corporate account number, Tax ID and 4 digit security PIN.

If you have any questions, please contact CorporateCardSupport@bokf.com.