

# Creating a Profile and Ordering Cards

From the Home page go to Administration. Click on Employees.

The screenshot shows the Spend Dynamics web application interface. At the top, there is a navigation bar with the BMO logo and the text "Spend Dynamics". Below this is a secondary navigation bar with links for "Home", "Administration", and "Reports". The main content area is titled "Administration Overview" and features two tabs: "Employee" (selected) and "Organization". A diagram illustrates the organizational structure, with "Employees" highlighted by a red circle. To the left of the diagram are three gear icons. To the right, a list of administrative functions is shown, including Charge Groups, Report Groups, Rights Groups, Approval Roles, and Rate Groups, each with a corresponding sub-function like Charge Codes, Reports, Rights, and Rate Tables. A sidebar on the left lists various management options such as Account Management, Instance Management, and File Management.

To order a card you must first have profile to map it to. From the Search page that pops up once you hit employee search for the employee by name. Hit Search. Or you can simply press Search and all profiles will pop up. Make sure you adjust the view from "Top 20" to "All" if you have more than 20 profiles.

Employee Search

Employee ID

Employee First Name

Employee Last Name

Account Number (Last 4 Digits)

Account Holder With

**System Login Rights**

Yes  Password Expired

No  Exclude Account Locked

All

**Lock Status**

Locked by Date

Manually Locked

Forgotten Password

Return Results

**Manager Details**

Manager First Name

Manager Last Name

Management Level

**Group & Role Memberships**

Login Disclaimer Acceptance

Date Ranges

User Rights

Additional Fields & Sort Order

If the profile does not exist you must Insert New Employee. If the employee does exist you proceed to the Account Management section order card.

The screenshot shows a web browser window with the URL <https://www.bmospenddynamics.com/main/homepage.asp>. The page features a blue header with the BMO logo and the text 'Spend Dynamics®'. Below the header is a navigation bar with 'Home', 'Administration', and 'Reports'. The main content area is titled 'Employee Administration' and includes a search icon and a 'Back' link. The message 'Sorry no employees found matching your criteria' is displayed. A red circle highlights the 'Insert New Employee' link in the top right corner of the main content area.

**Administration**

**Overview**

- Administration Overview
- Account Management
- Card Activity
- Email Management

**Instance Management**

- File Management
- Period Management
- Configuration Management
- Data Extract Management

**Employee Administration**

View Your Organization's Employee Details

Sorry no employees found matching your criteria

[Insert New Employee](#)

Here you will create the profile to link the card to. Id, last name and your password are required. I would strongly urge you add first name and email address to receive information. Under Group and Role Membership choose Cardholder if you would like them to have minimal rights (they can view and print their statements and ones you delegate to them). Save

Personal Settings - Mozilla Firefox

Bank of Montreal (CA) https://www.bmospendynamics.com/settings/settings\_ss\_e1.asp?xs\_emp=-1

### Insert Personal Details

Employee ID *	<input type="text"/>	Group and Role Membership	▼
First Name	<input type="text"/>	Charge Group	<input type="text"/>
Last Name *	<input type="text"/>	Report Group	<input type="text"/>
Middle Name	<input type="text"/>	Approval Role	Administrator
Email Address	<input type="text"/>		Cardholder
Email Address 2	<input type="text"/>		Manager
Phone Number	<input type="text"/>	Manager Details	▲
Company Unit	<input type="text"/>	Default Coding	▲
Home Country Code	<input type="text"/>	Delegation	▲
Date Terminating	<input type="text"/>	User Details	▲

For security reasons before saving you need to enter your current password.

Your Password \*

Undo Save

Go to Account Management to order card.

Administration

- Overview > Administration Overview
- Instance Management > **Account Management**
- File Management > Card Activity
- Period Management > Email Management
- Configuration Management >
- Data Extract Management >

YOUR ACCOUNTS Displaying 5 of 5

Commercial Card		BMO
		5550-08xx-xxxx-6393
Current Balance (USD)	Available Credit (USD)	
1,271.66	18,728.00	
Cardholder: <b>Weidner Rebekah</b>		
Current period: <b>11/06/2018 to 12/05/2018</b>		
Last payment: <b>216.74 USD On 11/12/2018</b>		
Balance due: <b>216.74 By 11/12/2018</b>		
<a href="#">View Non-Posted Transactions</a>		
<b>Most recently closed period:</b>		
10/06/2018 to 11/05/2018		<a href="#">eStatement</a>

payment center and as of May 31, 2018, we will no longer be able to receive any packages at 234 Simcoe St., Toronto, ON M5T 1T4, Canada. Following May 31, please make appropriate arrangements to have all overnight courier payments sent to the correct address which can be found on your monthly statement. For additional information, please contact your BMO Financial Group representative.

[Click here](#) to see what's new with our latest BMO Spend Dynamics® release! (09/2018 - Release 4)

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When the Search box pops up hit Search on the bottom and x out of Search box.

Account Search - Mozilla Firefox

Bank of Montreal (CA) | https://www.bmospenddynamics.com/reports/report2\_1515c.asp

## Account Search

Report mode: Employee  Account

Account Number (Last 4 Digits)

Account Issuer

Account Status

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Hierarchy Node

First Name

Last Name

---

Export File Name

Export File Type

---

Summary - Issuer  Unmapped Details

Summary - Hierarchy Node

Account Listing  Selected Node Only

Account Details

Account Mapping  All accounts  
 Mapped accounts only  
 Unmapped accounts only

Account Activity  All accounts  
 Used accounts only  
 Unused accounts only

Account Date Ranges

Account Limits

Additional Fields

Report Templates

Click on Create New Card and follow the instructions. If you have questions call Spend Dynamics Client Services: 800.844.6445. If you have a large number to order please contact Client Services.

You can also view card requests here.

File Edit View History Bookmarks Tools Help

Spend Dynamics

Bank of Montreal (CA) https://www.bmospenddynamics.com/main/homepage.asp

Most Visited details Online Illinois ASBO: Projects Illinois ASBO Spend Dynamics FedEx Tracking Shi... Gmail: Email from Go... DeKalb CUSD428 Info... AIM Illinois P-Card

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BMO Spend Dynamics®

Home Administration Reports

Administration

Overview

- Administration Overview
- Account Management
- Card Activity
- Email Management

Instance Management

- File Management
- Period Management
- Configuration Management
- Data Extract Management

Account Search

All accounts matching your search criteria are listed below

Account Issuer	Unmapped	Open	Closed	Expired	Lost / Stolen
Bank of Montreal - MasterCard	-	11	16	-	23
Total	-	11	16	-	23

[Export to Excel](#) [Export to PDF](#)

Create New Card - MasterCard  
View Card Creation Requests