

DRIVENTM

Learn to navigate your account management site for better control of your company's account and expenses.

User Guide



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ACCESSING YOUR ACCOUNT

LOGGING IN

1. Navigate to <https://www.cardmanagementonline.com>
2. Enter **USERNAME** and **PASSWORD**.
3. Select **LOGIN**.

NAVIGATING THE SITE

The **NAVIGATION BAR** at the top of the page is designed to provide you with an easy-to-use and consistent navigation experience while using the account management site. Regardless of where you go on the site, the navigation bar will always be at the top of every page, allowing you to move around freely and easily from task to task.

Below is a summary of the features under each navigation bar option:

Dashbard	<ul style="list-style-type: none">> View a breakdown of purchase categories and amount spent by card type> Select spend categories to review transaction details> View summary of the TOTAL SPENT for selected date range> View CREDIT LIMIT, NEXT PAYMENT DUE DATE, AND PAYMENT AMOUNT DUE
Cards	<ul style="list-style-type: none">> View a list of all active cards on the account> Use the status icon by each card to turn the card ON or OFF (temporary block)<ul style="list-style-type: none">○ Turning off the card temporarily blocks the card from use.○ To turn card back on, move status icon from “off” to on”> Select anywhere on the card line to update card preferences



	<ul style="list-style-type: none">> To add (i.e. order) a new card, select the “Add a Card” button<ul style="list-style-type: none">○ Select the card to be added and complete the form○ When completed, select “order card”
Transactions	<ul style="list-style-type: none">> View a list of posted transactions that can be filtered by authorization and decline status of transaction> Use the filter feature on the right side of the screen to limit search by date range, transaction type, cards and categories> Select the PRINT or EXPORT icons to create reports of transaction history per the selected filters
Statements	<ul style="list-style-type: none">> View a list of statements> Filter statements by date> Download the PDF file for each statement.
Pay Bill	<ul style="list-style-type: none">> Set up bank account information> Make a payment

These options are not found on the navigation bar but rather by clicking the ▼ icon to right of your name located at the top right-hand corner of the page:

User Settings	<ul style="list-style-type: none">> View BUSINESS INFORMATION including Business name, address, account number, and credit limit> Update CONTACT INFORMATION including Business phone and email address> Update password
Log Out	<ul style="list-style-type: none">> Logs you out of the account management system



CHANGING YOUR PASSWORD

Once you've logged into your account:

1. Select the ▼ icon to the right of your name located at the top right-hand corner of the page.
2. Select **USER SETTINGS**.
3. Navigate to the **UPDATE YOUR PASSWORD** section at the bottom right of the page.
4. Enter your **CURRENT PASSWORD**.
5. Enter your **NEW PASSWORD**.
6. Enter your new password again in the next field to **VERIFY NEW PASSWORD**.
7. Select **UPDATE PASSWORD**.

DASHBOARD

There are 2 different charts on this page that provide a dynamic view of your account activity. The **PIE CHART** provides a summary of overall spending by purchase category. The **LINE CHART** provides a summary of overall spending for the top 5 cards on the account.

1. Hover over any area of the chart and a summary will display with information on the **PURCHASE CATEGORY** and **SPENT AMOUNT**.
2. Select any section of the chart or the purchase category key at the bottom of the page to view the card transactions details associated with the selected purchase category.

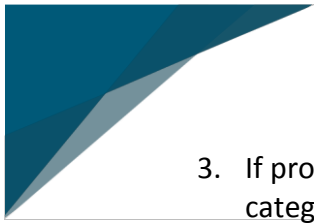
Adjust the view of the dynamic charts by using the date filters on the right side of the page. Filter options available are by **WEEK**, by **YEAR**, by **MONTH**, or by **CUSTOM** dates.

CARDS

The Cards page is designed to help you manage your card inventory easily and efficiently. This page provides a list of all cards that are available on your account. It also provides a high-level overview of the card types, time of use, and spend limits for each card.

ADD CARDS

1. Select the **ADD A CARD** button.
2. Select one of the available **CARD TYPE** by selecting the card image.



3. If prompted to select the type of purchases allowed on the card, specify the purchasing category by clicking the radio button. To further customize individual spending categories, select the **DETAILS** link.
4. Complete **NEW CARD DETAILS** by entering the card user's name as it should appear on the card.
5. Complete **CARD PREFERENCES**.
 - a. Enter the **SPENDING LIMITS**. Spending limits must be greater than \$1 and less than the account's credit limit.
 - b. Select from the drop-down box to indicate whether the spending limit should be applied **PER DAY**, **PER WEEK**, or **PER MONTH**.
 - c. Indicate **ON WHICH DAYS THIS CARD CAN BE USED** by marking the applicable radio button.
 - d. Indicate **WHAT TIME OF DAY THIS CARD CAN BE USED** by marking the applicable radio button.
6. Select **ORDER CARDS**.

TEMPORARY BLOCKING AND UNBLOCKING A CARD

Find the name and card number of the card you wish to block temporarily by reviewing the **CARDS** column table. Temporarily blocking the card means the card can not a be used to make any transaction while in "off" status.

1. To block the card from the **STATUS** column, move the button on the icon to the left to turn the card "off."
2. To unblock the card, from the **STATUS** column, move the button on the icon to the right to turn the card "on."


EDITING A CARD

This menu will allow you to order a replacement card, restrict the use of the card, delete a card, and update card restrictions.

1. Find the name and card number of the card you wish to update by reviewing the **CARDS** column table.
2. Select the line the card is on to **EDIT** the card.

REISSUE CARD

1. Select the **REISSUE CARD** button to replace a worn or damaged card.
2. Select **CONFIRM AND REISSUE CARD** to complete the action, or **CANCEL** to cancel and return to the card's page.

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3. A new card with the same card number will be issued.

DELETE THIS CARD

The steps below allow you to permanently close and remove cards from your inventory.

1. Select the **DELETE THIS CARD** button to permanently remove a card from your account.
2. A confirmation window will appear.
3. Select **CONFIRM AND DELETE CARD** to complete the action, or **CANCEL** to cancel and return to the card's page.

The card will no longer be available for use and will be deleted from the **CARDS** page.

IF YOUR CARD HAS BEEN LOST OR STOLEN, this feature allows you to immediately block and permanently close the compromised card to prevent unauthorized use. You can then reorder a new card with a new card number by following the steps in **ADD CARDS** above. You should also immediately contact Customer Service at the phone number on the back of your card to report the card as lost or stolen.

EDIT CARD SETTINGS

1. EDIT CARD PREFERENCES

- a. Enter the **SPENDING LIMITS**. Spending limits must be greater than \$1 and less than the account's credit limit.
- b. Select from the drop-down box to indicate whether the spending limit should be applied **PER DAY**, **PER WEEK**, or **PER MONTH**.

2. EDIT DAYS AND TIMES ACTIVE

- a. Indicate **ON WHICH DAYS THIS CARD CAN BE USED** by marking the applicable radio button.
- b. Indicate **WHAT TIME OF DAY THIS CARD CAN BE USED** by marking the applicable radio button.

3. EDIT ALLOWED PURCHASE CATEGORIES

The ability to customize purchasing categories is available on some card types, and it can be done in two ways:

- a. To customize purchasing category group, select the radio button that applies. To further customize by individual spending categories, select the **DETAILS** link next to the purchasing group name.
 - b. To disable a specific purchase type, unselect the checkbox next to the item.
4. Select **UPDATE CARD** to save your changes. Select **CANCEL** to go back to the list of cards on your account.



TRANSACTIONS

This page provides details to the transactions on the account which can be filtered by week, month, year, or custom dates.

SEARCH FOR A TRANSACTION

Enter a keywords related to the transaction in the search field by last four digits of the card number, merchant, city, and employee.

FILTER

1. Select **WEEK, MONTH, YEAR, or CUSTOM** to filter by date range.
2. Check the box **POSTED TRANSACTIONS, AUTHORIZATIONS, and DECLINES** to filter by the status of the transaction.
3. Use the drop-down under **CARDS** to filter by a specific card.
4. Use the drop-down under **CATEGORIES** to narrow your search by the purchase category of the transaction.

PRINTING THE TRANSACTION DATA

Select the printer icon to print a report of the filtered results.

EXPORTING TRANSACTION DATA

Select the spreadsheet icon to download the filtered results.

STATEMENTS

This page provides a PDF download of all available statements.

1. Filters can be used to narrow the list of invoices available to download.
2. Locate the statement you wish to view and select **DOWNLOAD**.

PAY BILL

In order to make a payment on the account, you must first set up your bank account.

ENTER YOUR BANK INFORMATION

1. Select your bank **ACCOUNT TYPE** from the drop-down.



2. Enter your **9-DIGIT ROUTING NUMBER**.
3. Enter your **ACCOUNT NUMBER**.
4. Verify your **ACCOUNT NUMBER**.
5. Give the account a **NICKNAME**.
6. Select **SAVE**.
7. On the next page,
 - a. Select the hyperlink **SUBMIT** to make a payment.
 - b. Select the hyperlink **ADD** to add additional bank accounts to your profile.
 - c. Navigate back to the **PAY BILL** screen.

PAYING A BILL

1. Navigate to the **PAY BILL** page.
2. Select your **PAYMENT OPTIONS**.
 - a. **ACCOUNT BALANCE** to pay the entire outstanding balance
 - b. **TOTAL DUE** to pay the total balance due on the current statement.
 - c. **OTHER AMOUNT** to enter an alternative amount you wish to pay. This amount cannot be greater than the account balance.
3. Select your bank account by using the drop-down under **FROM** field.
4. If you wish to add a new bank account, select the **MANAGE BANKS** button.
5. Select **NEXT**.
6. Review your entry to confirm accuracy and select **CONFIRM PAYMENT** to submit.
7. Select **EDIT** if you need to go back and make changes.

MANAGE BANK ACCOUNTS

This section allows you to delete current bank account details and add new bank accounts. To manage your bank account:

1. Select **PAY BILL** on the **NAVIGATION BAR**.
2. Select the **MANAGE BANK** button.



DELETE BANK INFORMATION

1. Select the **DELETE ACCOUNT** hyperlink beside the bank account you wish to remove from your profile.
2. A confirmation window will appear.
3. Select **YES, DELETE MY ACCOUNT** to complete the action, or **CANCEL** to cancel and return to the **MANAGE BANK ACCOUNTS** page.

ADD BANK INFORMATION

1. Select the **ADD BANK** button.
2. Select your bank **ACCOUNT TYPE** from the drop-down.
3. Enter your **9-DIGIT ROUTING NUMBER**.
4. Enter your **ACCOUNT NUMBER**.
5. Verify **ACCOUNT NUMBER**.
6. Give the account a **NICKNAME**.
7. Select **SAVE**.
8. On the next page,
 - a. Select the hyperlink **SUBMIT** to make a payment.
 - b. Select the hyperlink **ADD** to add additional bank accounts to your profile.
 - c. Navigate back to the **PAY BILL** screen.