



Welcome to SpendTrack for Program Administrators! Get started in 2 steps:

1. Call the MB&T Service Center at (805) 963-7511 to request an activation email with your first-time login instructions including an Activation Code. Once initiated by a Service Center associate, the email will be sent from alerts@spendtrack.fiserv.com with the Subject: **SpendTrack Welcome & Activation**. The Activation Code in the email is only valid for 2 days, so don't delay!

Sample email:

Dear Business Customer,

Welcome to SpendTrack, provided by MONTECITO BANK & TRUST. You recently received an email from MONTECITO BANK & TRUST notifying you of a change to your credit card online account access. MONTECITO BANK & TRUST Institution Administrator is informing you about the steps necessary to access SpendTrack.

What is SpendTrack?

SpendTrack is a new, improved online credit card management solution that allows businesses to easily manage credit card accounts online and provides real-time card controls, transaction details, statement access, payment capabilities, and spend analytics. SpendTrack replaces your current online card management solution.

To access your business credit card account online with SpendTrack, please follow the instructions below to set up your account.

How to Set Up Your SpendTrack Account:

1. To access and set up your SpendTrack account, click the activation link: <https://spendtrack-stage.fiservapp.com/montecito-bank-trust/activate>
2. Enter the following **Activation Code** in the required field:
bc1fd2b9-bae4-4522-a6e5-5809ead16150
(This activation code will expire in 2 days.)

How to Access Your Account

Once your SpendTrack account has been set up, please use the following new URL to log into your account: <https://spendtrack-stage.fiservapp.com/montecito-bank-trust/>
Consider adding this URL to your favorite bookmarks for future use.

- Enter your email address
- Enter your password
- Check your email for your one-time passcode
- Enter the one-time passcode in the required field

If you have any questions or require assistance, please contact your MONTECITO BANK & TRUST Administrator at (855) 256-9153.

2. Once you are logged in, invite Users to the Cardholder Portal by following the 3 steps in the screenshot below. Inviting Users will send a **SpendTrack Welcome & Activation** email with first time login instructions to the User's email address.



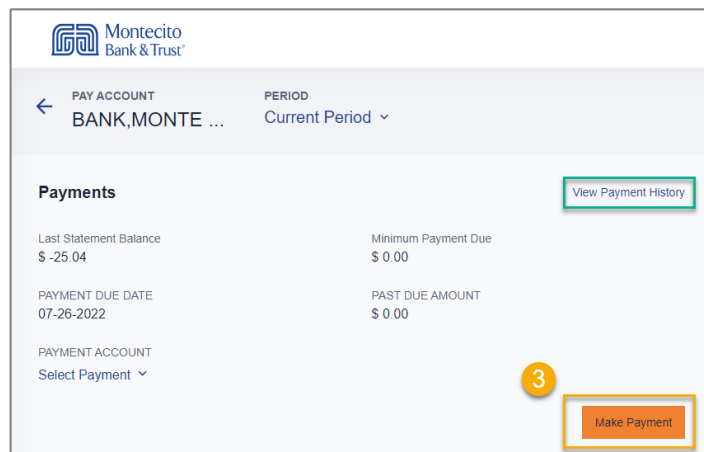
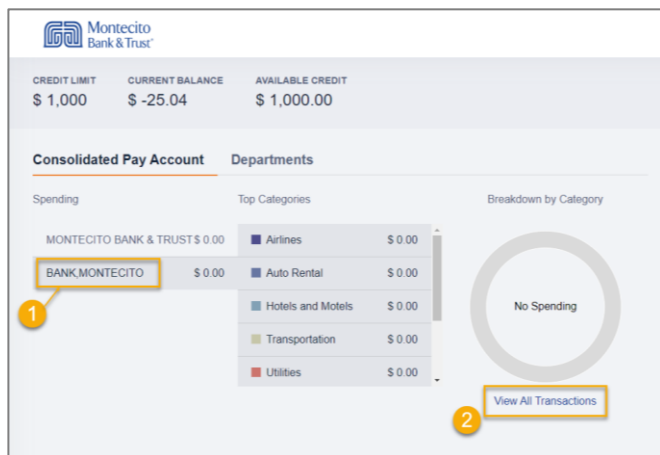
Note: If you wish to make a User a secondary Program Administrator, click the ellipses next to their name, select **Edit Profile**, and change their role to Program Administrator before sending the invitation. This will send an activation email to the user for the Program Administrator portal.

	NAME	EMAIL	DEPARTMENT	USER TYPE	STATUS	CARD
<input checked="" type="checkbox"/>	John Smith		MONTECITO BANK & TRU ...	User	Ne	Send Invitation
<input type="checkbox"/>			MONTECITO BANK & TRU ...	Program Administrator	Ac	Edit Profile View Transactions
<input type="checkbox"/>	Jane Smith		Sales	User	Ac	Card Profile
<input type="checkbox"/>	Jeff Smith		Sales	User	Not invited	...7173

More Useful Tips for Getting Started

Make a Payment

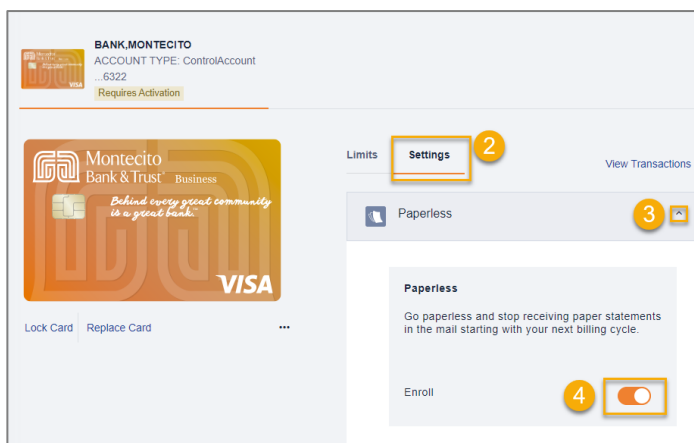
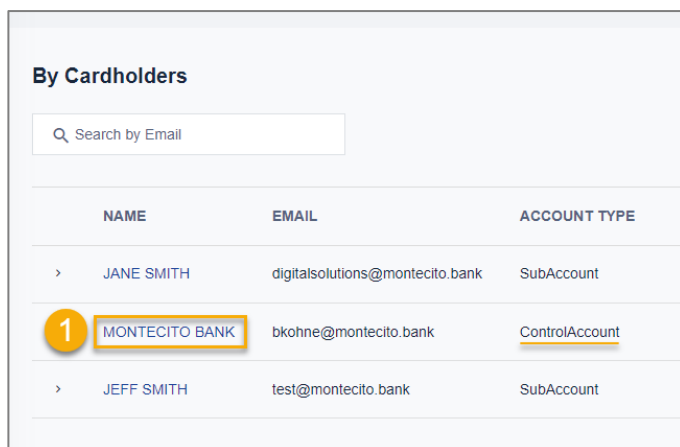
If you had payment accounts and/or autopay set up in the old card portal, your payment settings should already be established in the new portal. You can check this by clicking the **View Payment History** page (see green box below for link location).



1. Click on the **Control Account Name** (second name listed) on the dashboard
2. Click **View All Transactions**
3. Click **Make Payment** to schedule a one-time or recurring payment

Enroll in eStatements

If you were enrolled in eStatements in the old portal, your eStatement settings should already be established in the new portal. You can verify enrollment or enroll for the first time by following these steps:



1. On the **Home dashboard**, scroll down to the **Cardholder list**. Then click on the **Control Account Name**.
2. Click **Settings**
3. Click the **Paperless** header to expand the paperless settings
4. Click the toggle to **Enroll**