

UMB Commercial Card Mobile App

Cardholder Walkthrough

UMB Commercial Card - Sales Team Presentation

Preview of Mobile App

Mobile App: Download & Installation



INSTALLATION:

- Search the Apple App Store or Google Play Store from your mobile device



For iPhone users.



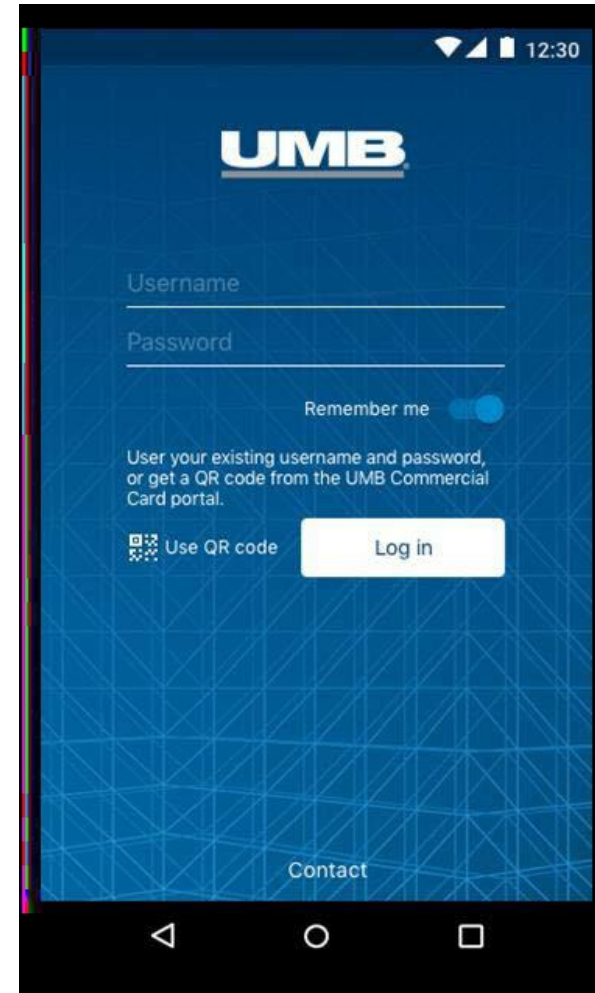
For Android users.

- Search for “**UMB Commercial Card**”
- Look for the UMB app with the card image in the tile.
- Click “Install” to download the **UMB Commercial Card** Mobile App.



AUTHENTICATION:

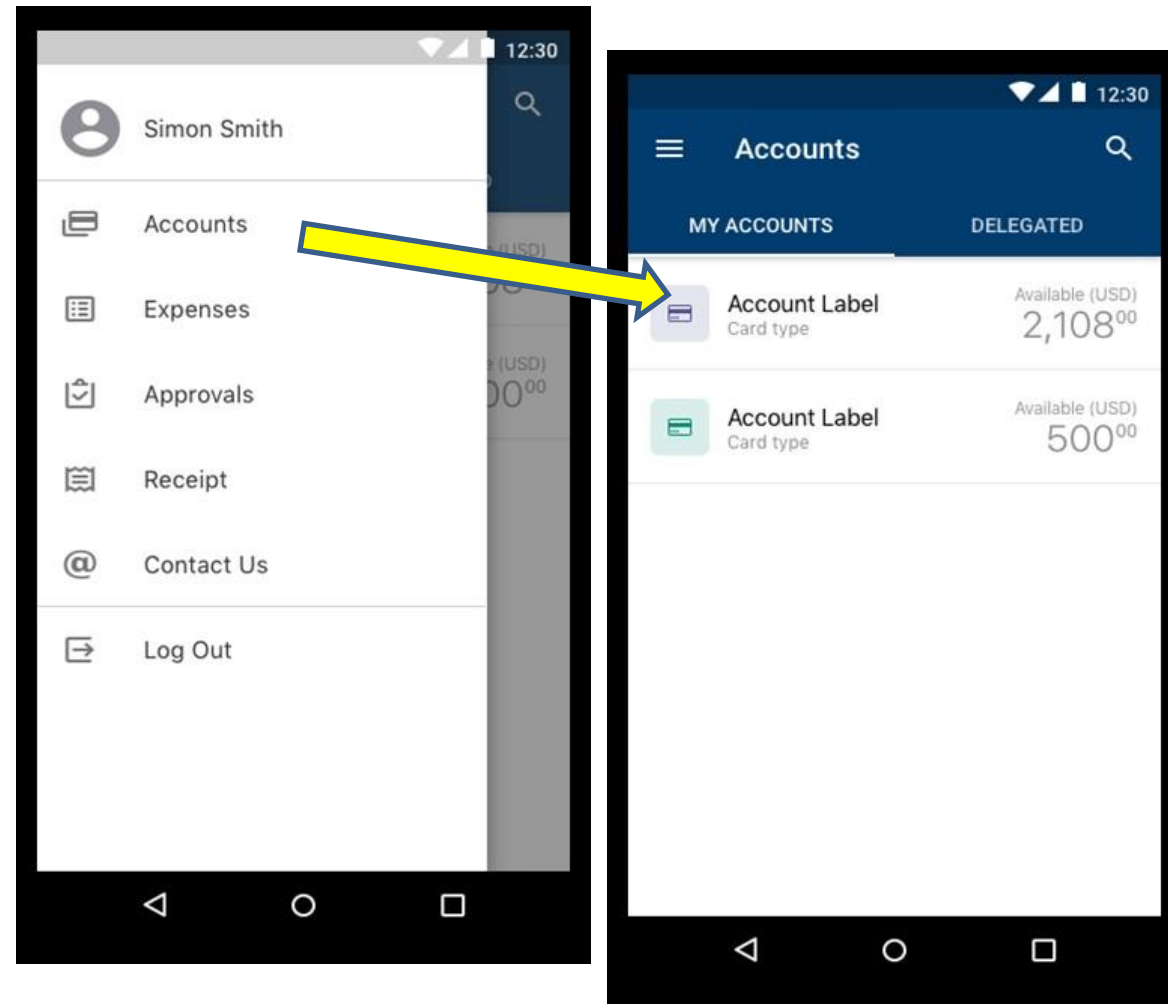
- Log-in with the same Username and Password as the UMB Commercial Card website
- Designate a PIN for quick access
- Enable Biometric Authentication to log-in (under Settings on your device)
- Register your mobile device within the UMBCC platform with a QR Code



Mobile App: Account Details

ACCOUNTS:

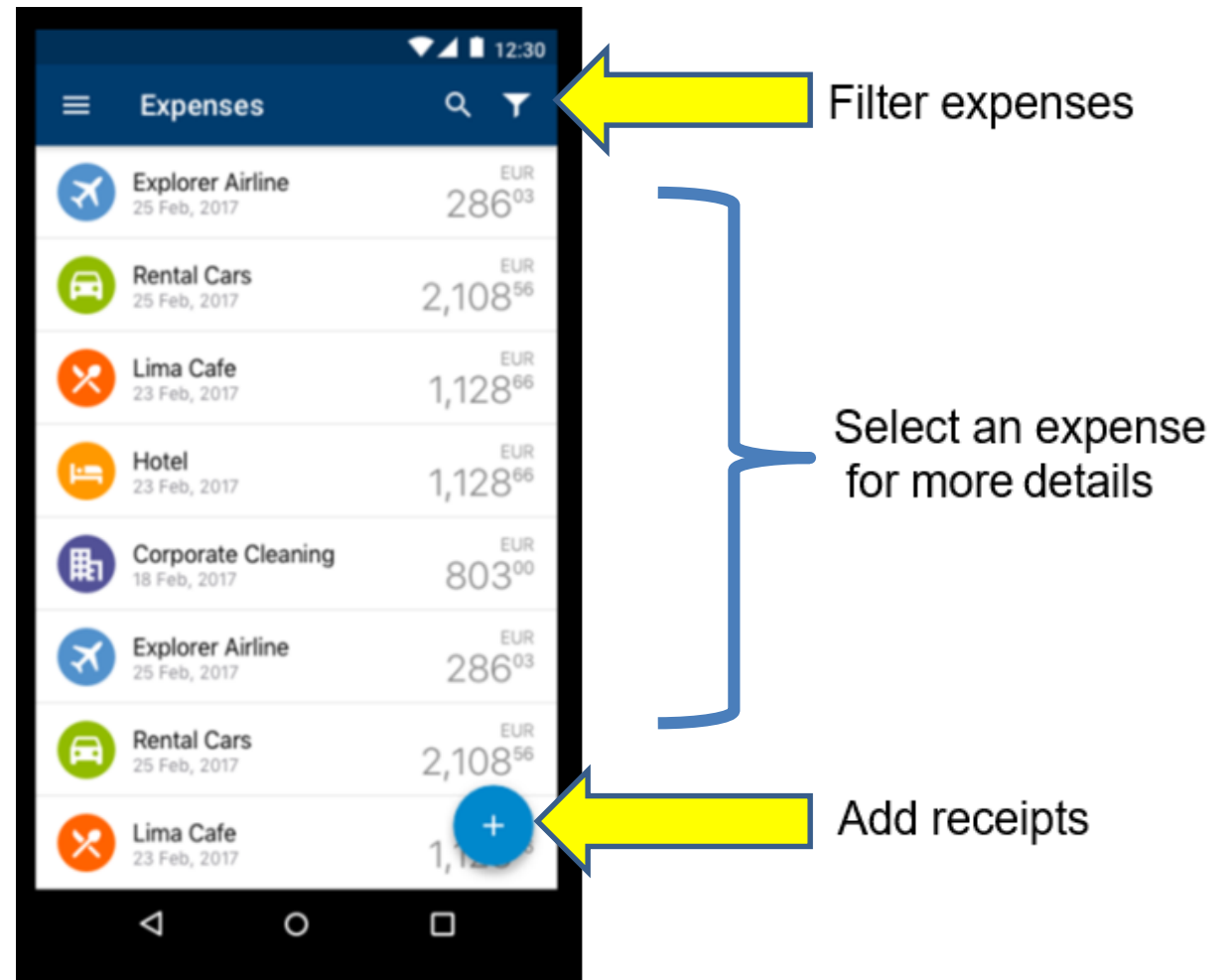
- View all active/mapped card accounts
- Search for a specific account if multiple cards are active
- “Refresh” or select account to obtain details in real-time:
 - Credit Limit
 - Balance
 - Amount Due & Due Date



Mobile App: Expenses

EXPENSES:

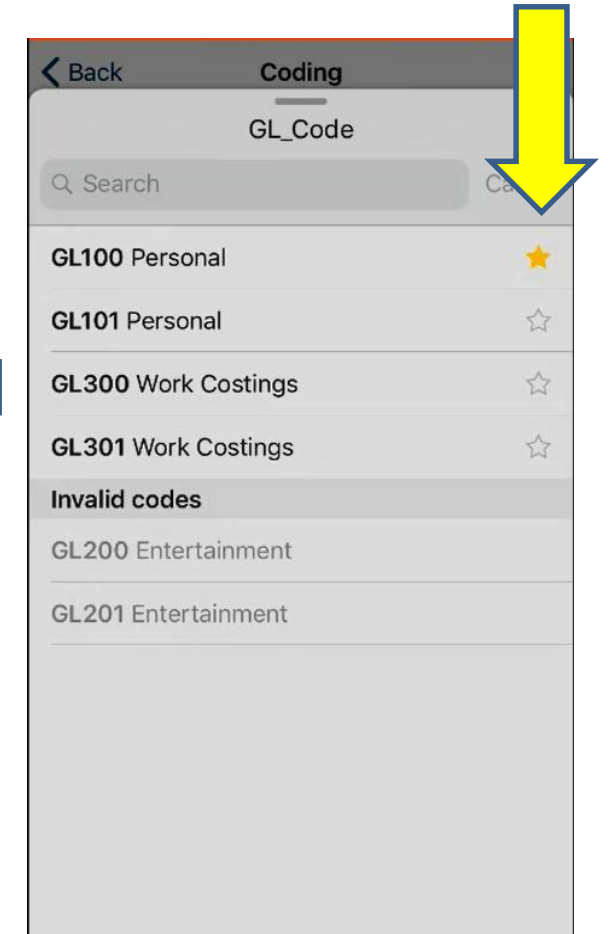
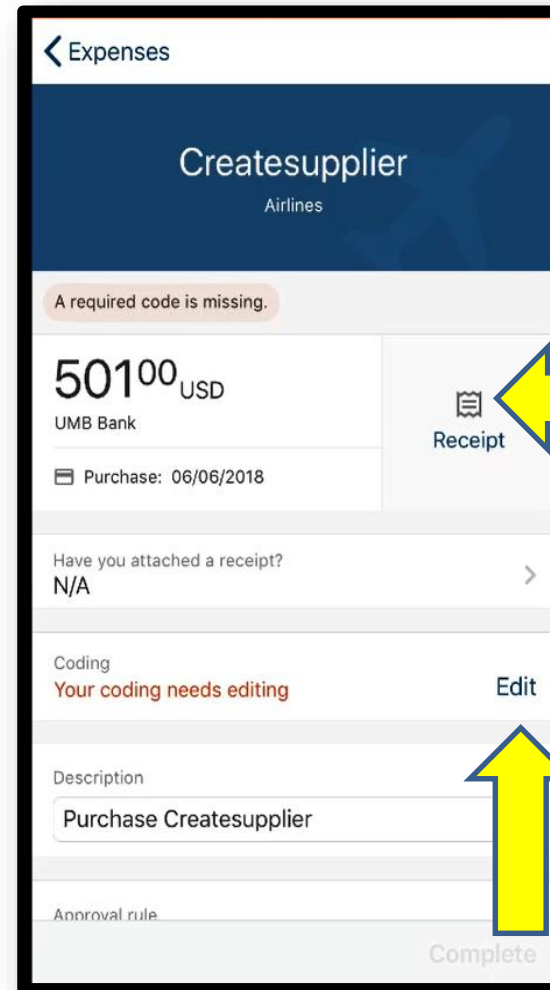
- Review transactions posted to account
- Create cash expenses
- Search expenses by merchant name, date, or amount
- Filter expenses by status
- Select an expense for more details
- Code transactions
- Add receipts
- Submit expenses for approval



Mobile App: Code Expenses

CODING TRANSACTIONS:

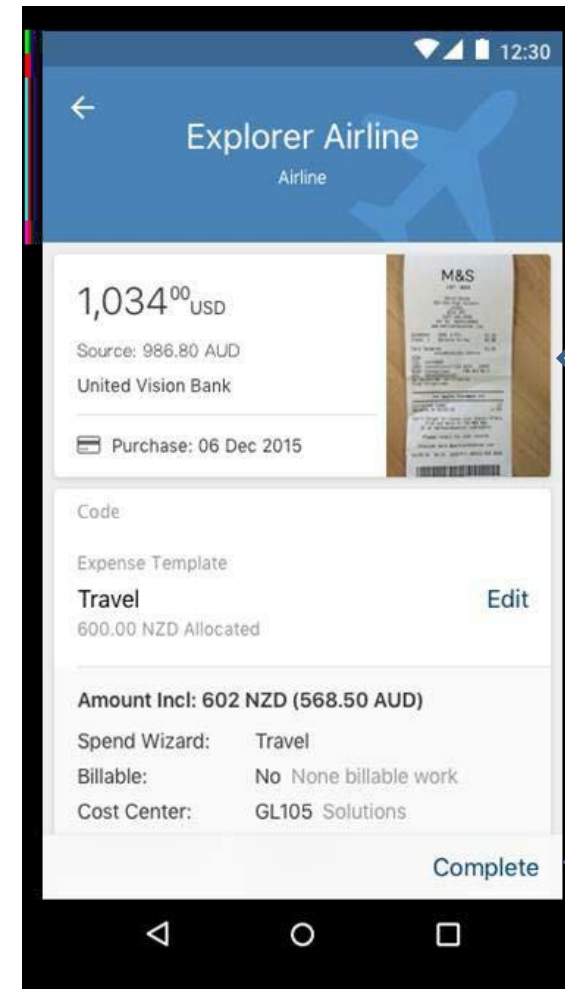
- Select an expense from the list to begin coding
- Click on 'Receipt' to link receipt images
- Choose 'Edit' to search for GL codes
- Save **Favorites** directly inside the app



Mobile App: Receipts

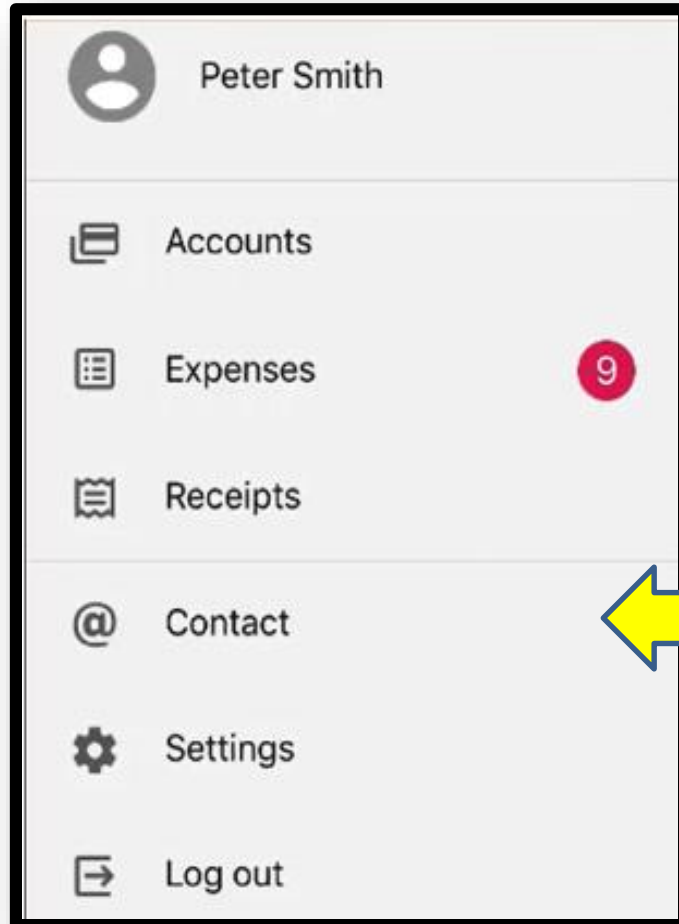
CAPTURING & ATTACHING RECEIPTS:

- Take photos with your mobile device
- Attach receipt images to expenses
- Eliminate the need to e-mail receipts to the image library
- Complete coding within the app
- Choose to code later with receipts already attached for ease and speed in completing Expense Reports




Receipt attached

Coding complete



LEFT-HAND NAVIGATION MENU:

- Click the three stacked bars  to open the left-hand navigation panel.
- **RECEIPTS** – Launches the entire Image Library (which mirrors any images stored within UMBCC via the desktop version of the application).
- **CONTACT** – Provides information about the user's mobile device: Manufacturer (Apple or Android), Model, Operating System, Device Name and App Version.
- **SETTINGS** – Allows the user to Create a PIN (if one was not established at the first log-in), designate the Home Page (Accounts or Expenses), turn Notifications 'on' and 'off', initiate Biometric Authentication (if preferred over the use of a PIN).

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