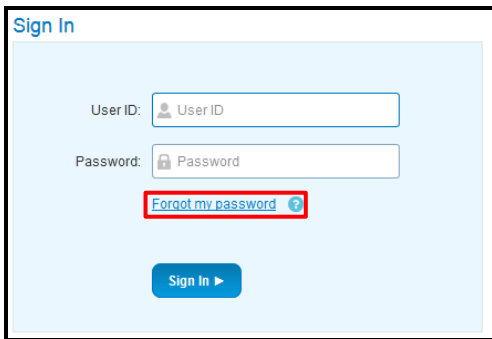**BMO** | **BMO Spend Dynamics® - Quick Reference Guide**   **Employee**

GETTING STARTED

First time Sign-In / Password Expiry (Video Tutorial)

Once the user logs in for the first time or their password has expired, the system will prompt the user to accept the Terms & Conditions, to change the temporary password for a permanent one.


Password requirements:
- Must be 8 to 20 characters long
- Must have lower and upper cases
- At least one numeric character
- At least one special character

The system will request the user to create three security questions.

Note: If you forget your password, please use the link "**Forgot my password**" to reset it. Three unsuccessful attempts will lock the user out of Spend Dynamics. For additional assistance, contact your program administrator.

Settings

From the **General Navigation** menu, users may access their Personal Settings page:
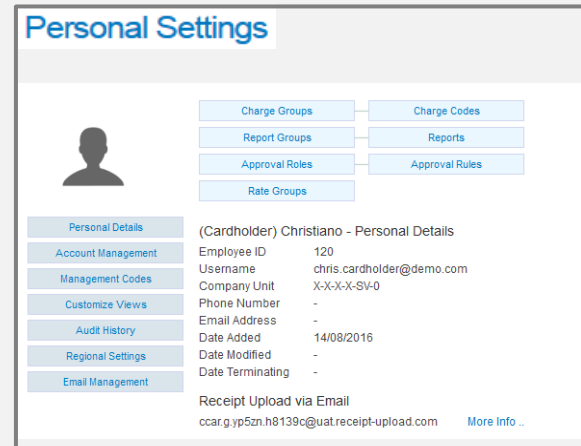
This page provides access to personal settings, such as Time zones, Date and Time format, decimals, and so on.

Home Page (Video Tutorial)

On the Home Page, users will see:

a) The **Main Menu** on the top
b) **General Navigation** menu - top right
c) **Card accounts** associated to their profile
d) **Announcements** section
e) **My Actions** section
f) **Pinned** section – when users pin their favourites, they will appear on Home page

General Navigation

In the upper right corner, there are options to change language, personal settings, help content, contact info for BMO and the logout button.
They are located under the user's name in a drop-down:
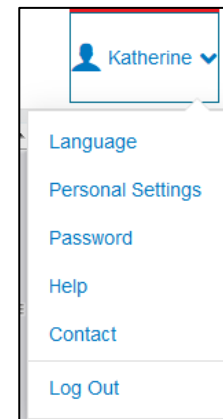
Main Menu

The Main Menu is located at the top of the page. Based upon the user's role, menu options may vary.

Support Services

How to get online help

Click on the **Help** button or you can access the online User Documentation by clicking on the Documents tab in the top navigation bar.

How to get offline help

For general questions about Spend Dynamics, contact your program administrator.

To report a lost/stolen card, or fraudulent transactions, please call BMO Customer Service at 1-800-263-2263 24x7 contact centre as soon as possible.
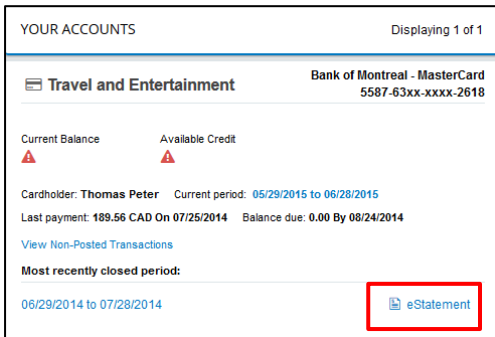
BMO | BMO Spend Dynamics® - Quick Reference Guide   **Employee**

eSTATEMENTS

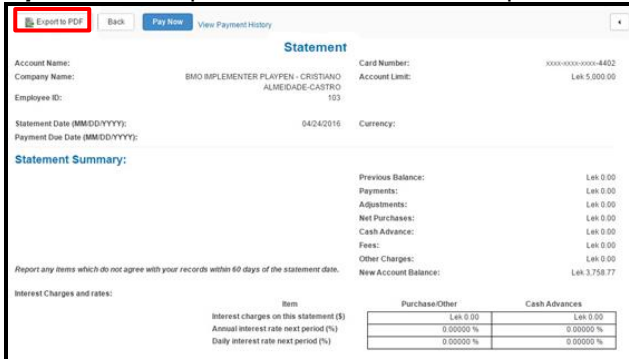### Viewing/Printing eStatements (Video Tutorial)

On the **Home Page**, users will see cards associated with their profile:

Step 1: To access current month's statement, click on the **eStatement** link shown above.

Note: For previous cycles, historic statements are available from the **eStatement** link on the **Main Menu.**
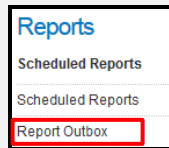
**Step 2:** On the top left of screen, click on Export to PDF.

When the Export to PDF button is clicked, you will see a success message as follows (on the bottom right-hand side of the screen):

> **Info**
> The statement is queued and will be available in your Report Outbox shortly.
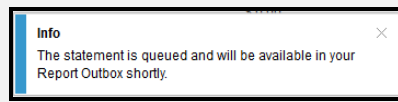
The eStatements, once posted, will be housed on the user's Reports Outbox:

Step 3: Click on Report Outbox link and a list of all reports will be displayed.
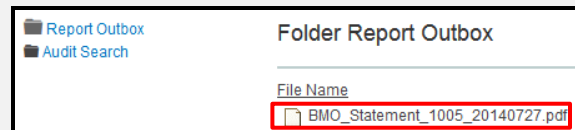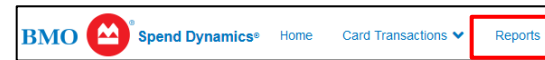

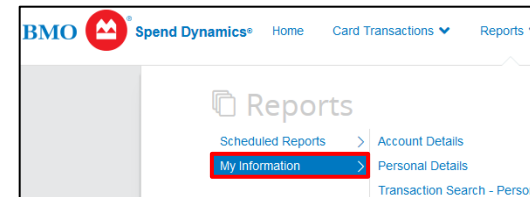**Step 4:** Click on the ⬇ icon to download to your computer.

REPORTS

Cardholder Reports (Video Tutorial)

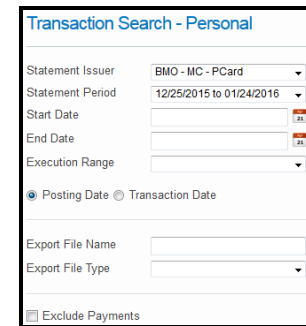**Step 1:** Select the **Reports** tab from the **Main Menu**:

Step 2: On the Main Menu, select **My Information** to expand the view.

Step 3: Click on **Transaction Search – Personal**.
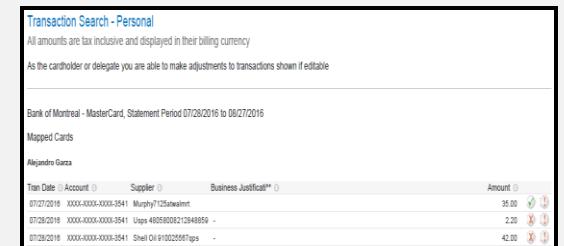
Step 4: In the **Search Engine**, select a **Statement Period** (drop down), or a certain **date range** (start date, end date or execution range).

Under **Transaction Type and Status**, users are able to filter transactions by type, supplier, currency, amounts, etc.

Under **Additional Fields**, users have the ability to include additional fields to their report.

Step 5: Click Search. Cardholders may export to PDF or Excel.

If cardholders need to create templates for reoccurring reports, they may do so by selecting all appropriate filters and expanding the **Report Templates drop-down.** A "Save Template" link will show. Select it, a **Create New Report Template** page will appear. Provide a name and save it.
To run a previously created template, simply expand the **Report Templates**, choose template and click on Search.