UMB Commercial Card Mobile App

Cardholder Walkthrough

UMB Commercial Card - Sales Team Presentation

Preview of Mobile App

Mobile App: Download & Installation

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INSTALLATION:

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

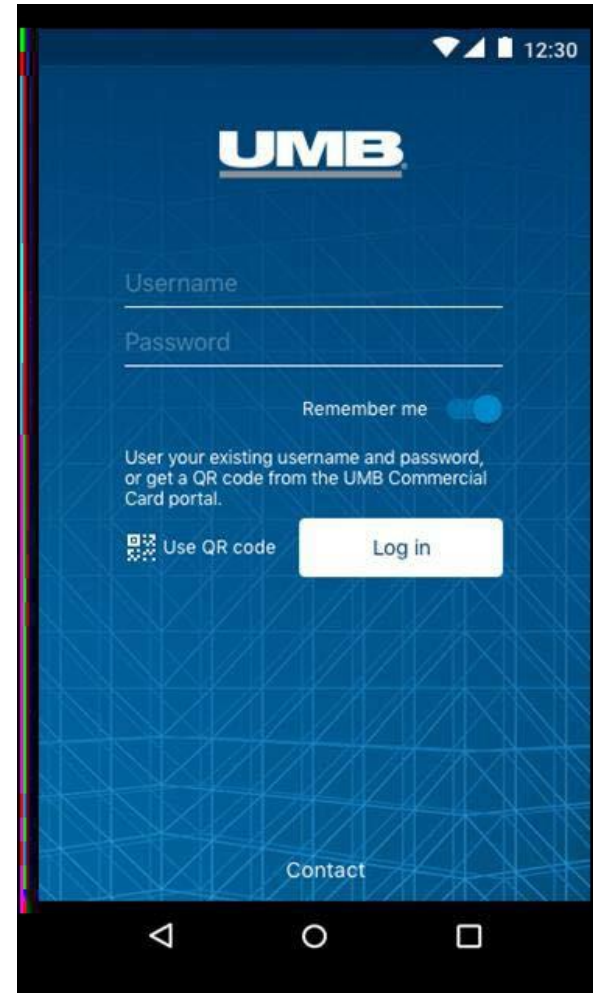 **Download on the App Store**   **For iPhone users.**   **GET IT ON Google Play**   **For Android users.**

- 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.

Apps

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Mobile App: Access

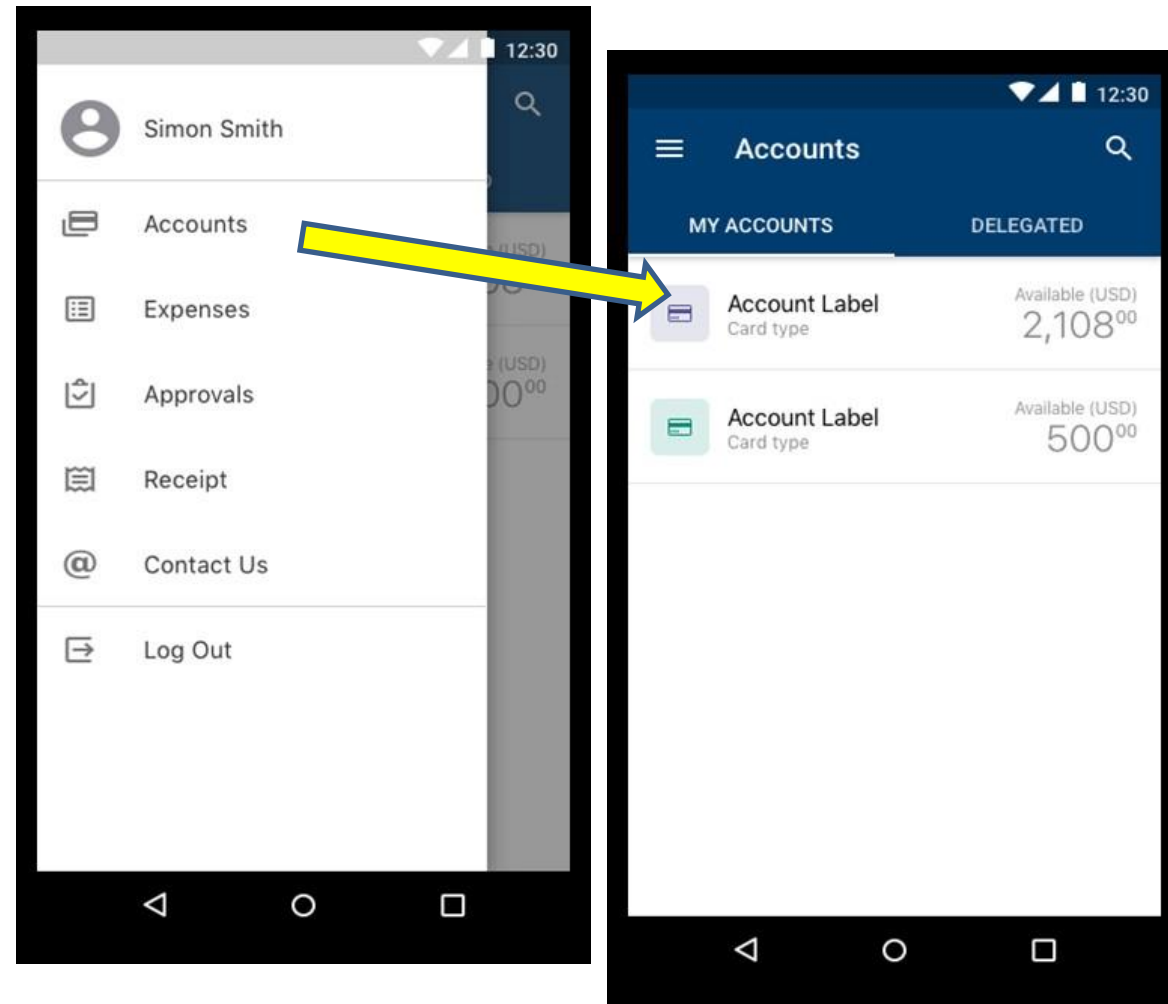**UMB**

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

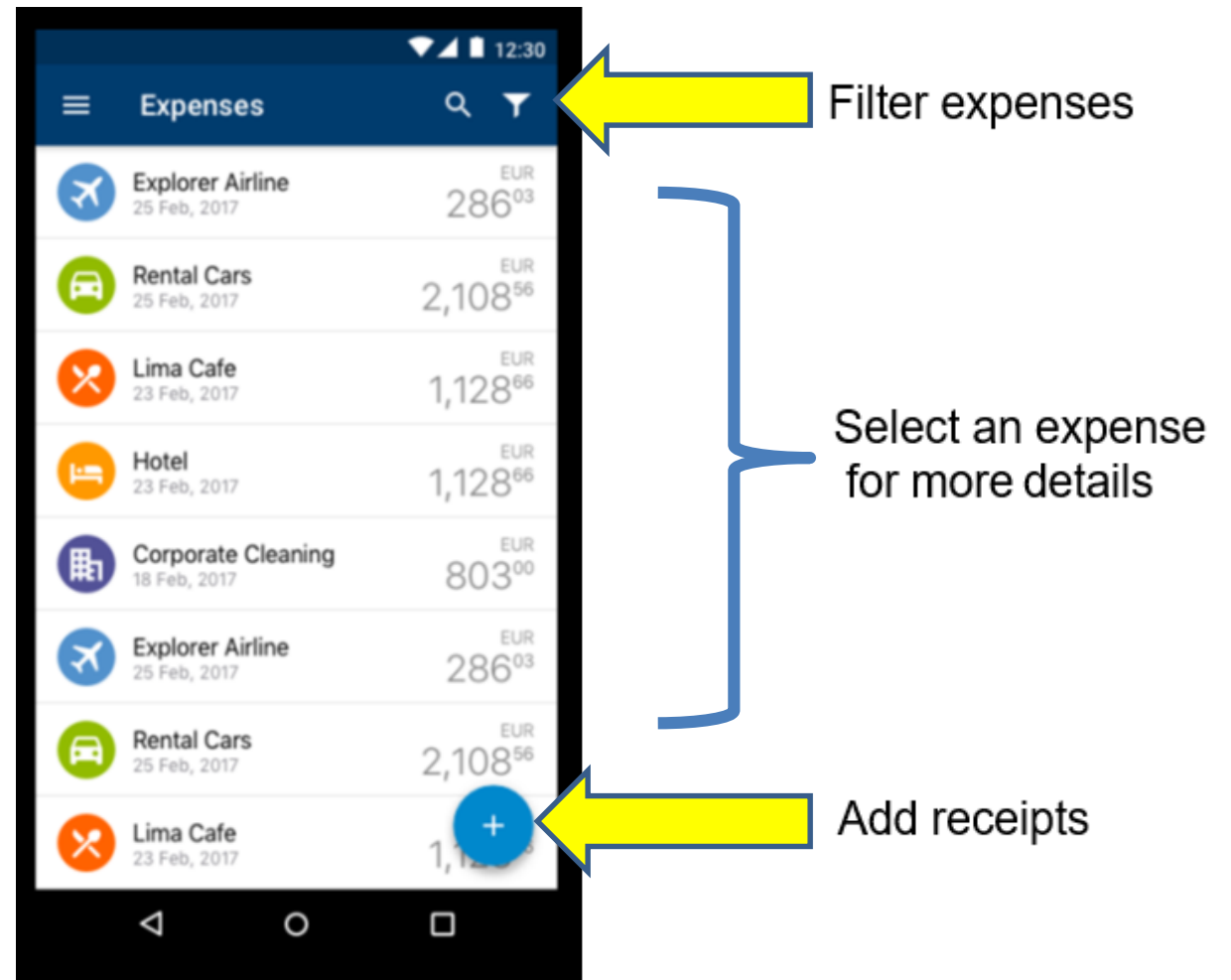# Mobile App: Account Details

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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
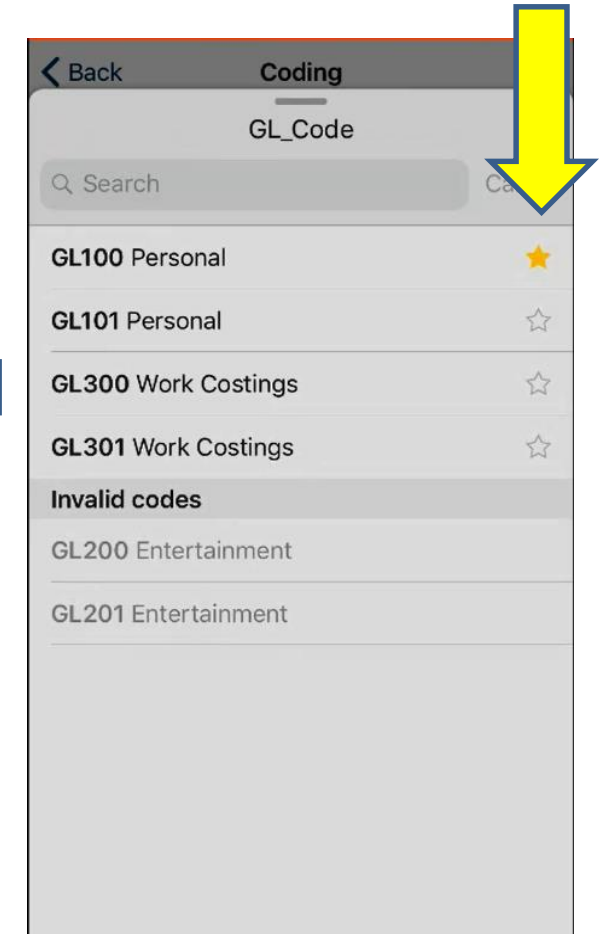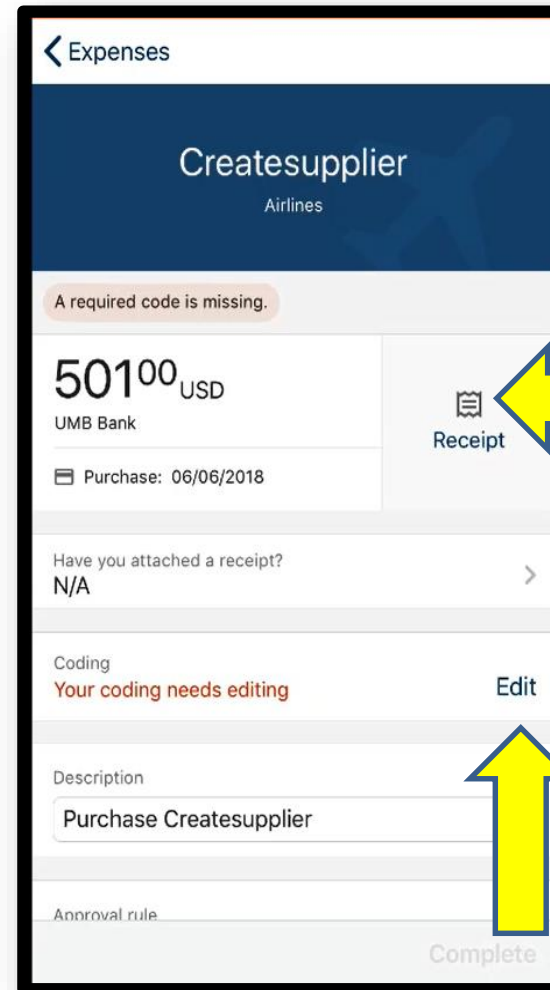
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EXPENSES:

- 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

Filter expenses

Select an expense for more details

Add receipts

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Mobile App: Code Expenses
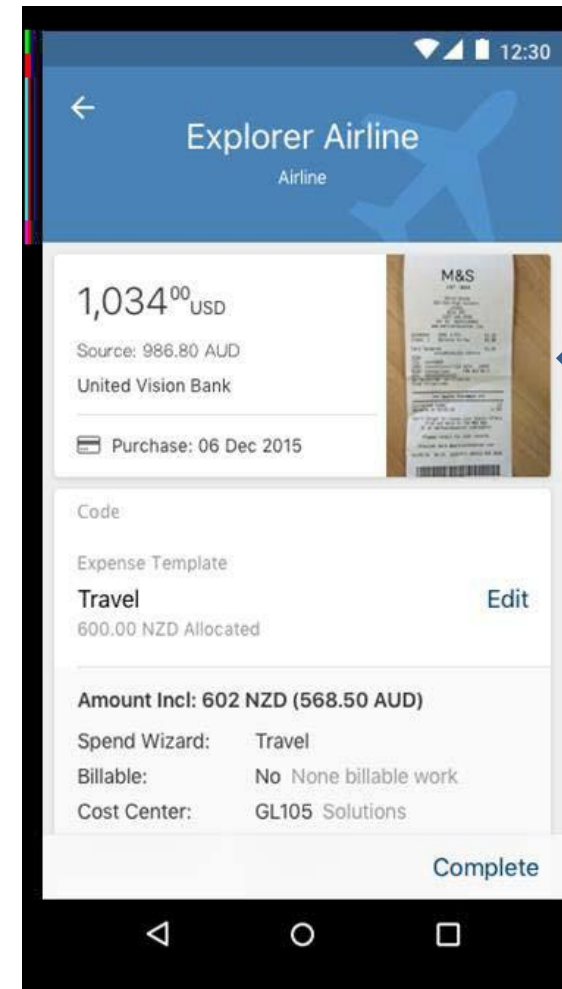
CODING TRANSACTIONS:

- 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
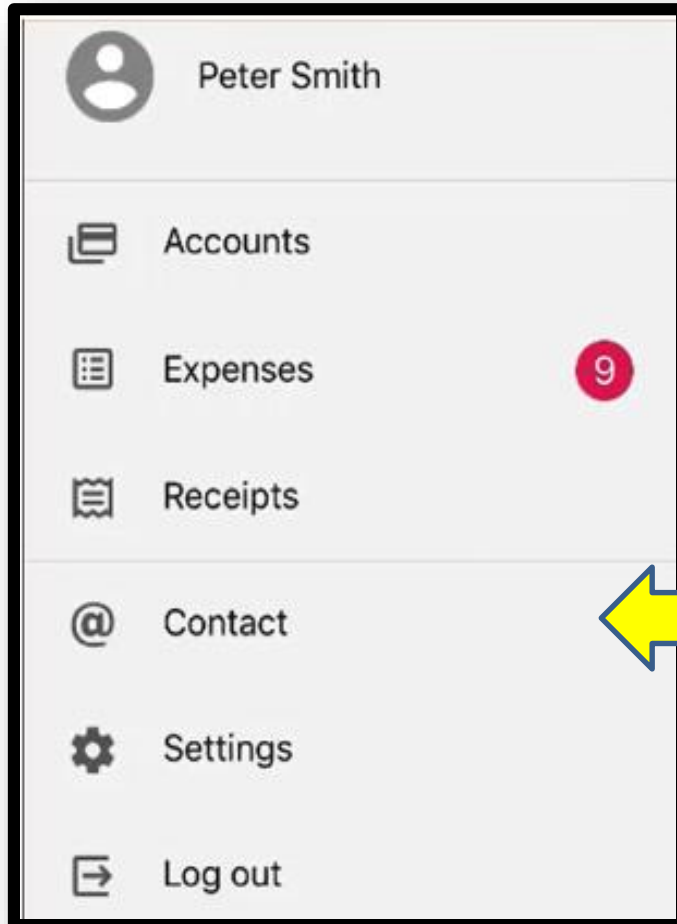
Mobile App: Receipts

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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

Mobile App: Other Functions within the App

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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).