

CORPORATE CARD GUIDE SERIES

Everything you need to issue, activate, and manage Paybotic Financial corporate cards. Eight focused one-pagers - Pick the guide that fits your role.

01 FOR ADMINS

SETTING SPENDING LIMITS

Build **reusable spending caps** — rolling-window budgets or per-swipe caps — that you apply to any cardholder at issuance.

02 FOR ADMINS

ADDING A CARDHOLDER

Issue a **physical or virtual** debit card to anyone on your team. Five steps from card type to Request card.

03 FOR ADMINS

ADMIN CARD CONTROLS

Once cards are issued, you stay in control. **Freeze, terminate, change limits, or rename** any card from the Manage Cardholder view.

04 FOR CARDHOLDERS

ACTIVATING YOUR PHYSICAL CARD

Verify your email, set a password, and access your card. The whole onboarding flow from inbox to Your Debit Card view.

05 FOR CARDHOLDERS

ACTIVATING YOUR VIRTUAL CARD

Welcome! Your administrator has issued you a **Paybotic Financial virtual corporate card**. Here's how to **verify your email, set a password, and start using your card** — in 5 steps.

06 FOR CARDHOLDERS

MANAGING YOUR CARD

Reveal card details for online use, add to **Apple Pay / Google Pay**, freeze if lost, and set a PIN.

07 FOR CARDHOLDERS

UPLOAD RECEIPTS

Attach a **receipt** to any posted transaction. **Uploaded receipts stay linked to the transaction**, making expense reports and bookkeeping easier later.

08 FOR CARDHOLDERS

DOWNLOAD STATEMENTS

Pull **monthly statements** from your card view in a few clicks. Perfect for **expense reports, bookkeeping, and tax season**.

HOW TO USE THIS SERIES PICK YOUR PATH

- **New admin?** Read in order — 01, 02, 03. That's the full lifecycle of issuing and managing cards.
- **New physical cardholder?** Start with 04. New virtual cardholder? Start with 05. Keep 06 handy for day-to-day questions.
- **Quick reference?** Each guide is a single page. Keep them bookmarked or printed near your workspace.
- **Need help?** Contact Paybotic Financial support — see footer.

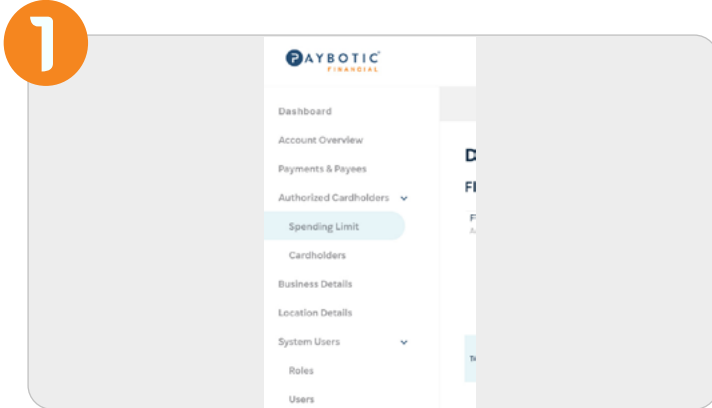
FOR ACCOUNT ADMINISTRATORS

SETTING SPENDING LIMITS

Reusable spending caps you create once and apply to any corporate card. Build them in 5 steps - then assign at card issuance

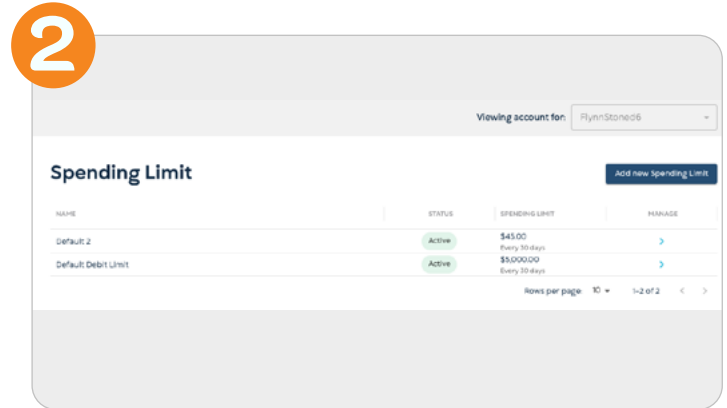
NEED HELP?

support@payboticfinancial.com
(833) 420 - 7300



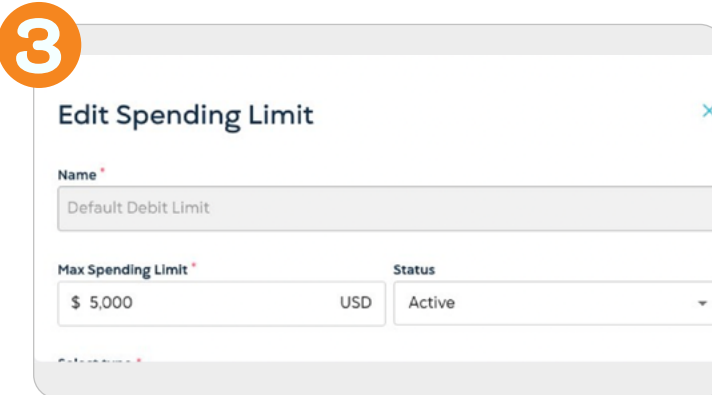
1 OPEN THE SPENDING LIMIT PAGE

In the Banking Portal, expand **Authorized Cardholders** in the left nav and click **Spending Limit**.



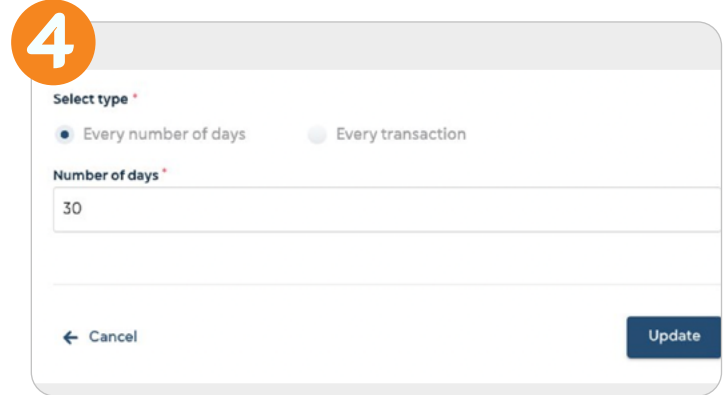
2 START A NEW LIMIT

Click **+ Add new Spending Limit** in the top right of the page to open the limit editor.



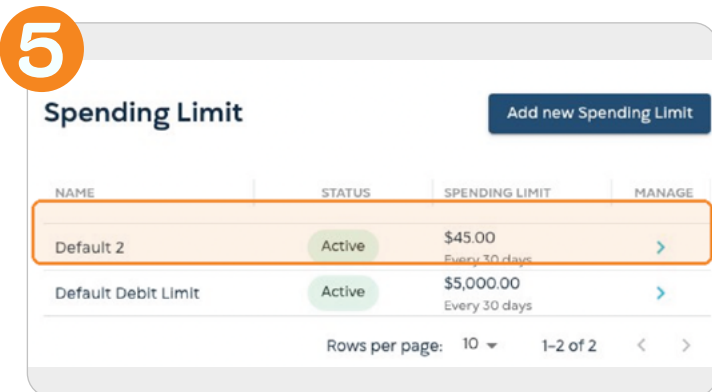
3 NAME & SET THE MAX AMOUNT

Give the limit a clear **Name** (e.g., "Travel — \$2K/30d") and set the **Max Spending Limit** in USD.



4 CHOOSE THE LIMIT TYPE

Every number of days for rolling-window budgets, or **Every transaction** for per-swipe caps.



5 SAVE & CONFIRM

Click **Create**. Your new limit appears in the list — ready to assign to any cardholder.

WHAT'S NEXT

PUT YOUR LIMIT TO WORK

- **Assign at issuance.** When you add a cardholder, your saved limits appear in the dropdown.
- **Track in real time.** See Current Utilization against the limit on the cardholder page.
- **Need a higher cap?** Contact Paybotic Financial support.

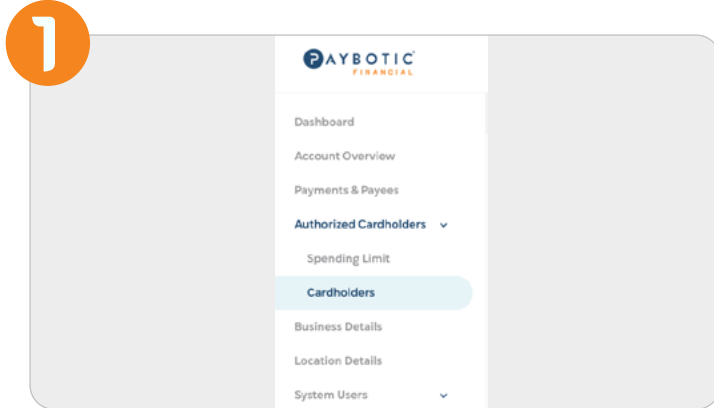
FOR ACCOUNT ADMINISTRATORS

ADDING A CARDHOLDER

Issue a physical or virtual debit card to anyone on your team - in 5 steps. Make sure your Spending Limits are set up first (see Guide 01).

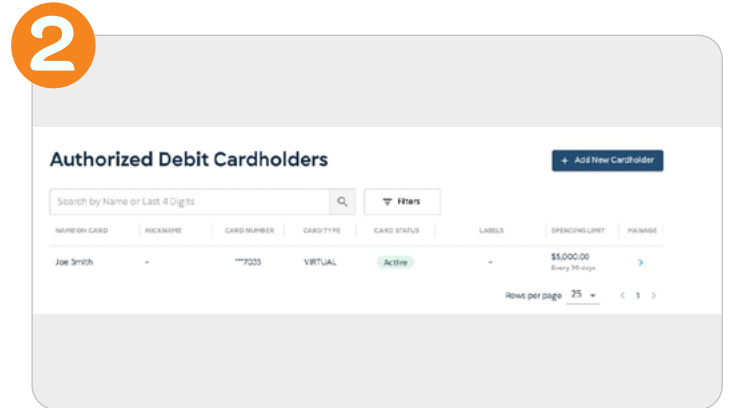
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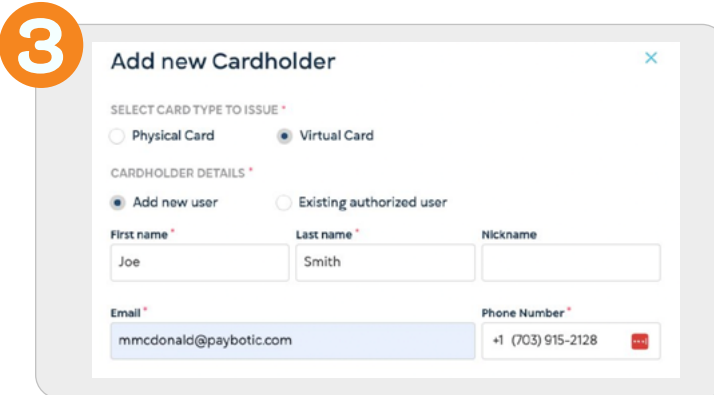
1 OPEN THE CARDHOLDERS PAGE

In the Banking Portal, expand **Authorized Cardholders** in the left nav and click **Cardholders**.



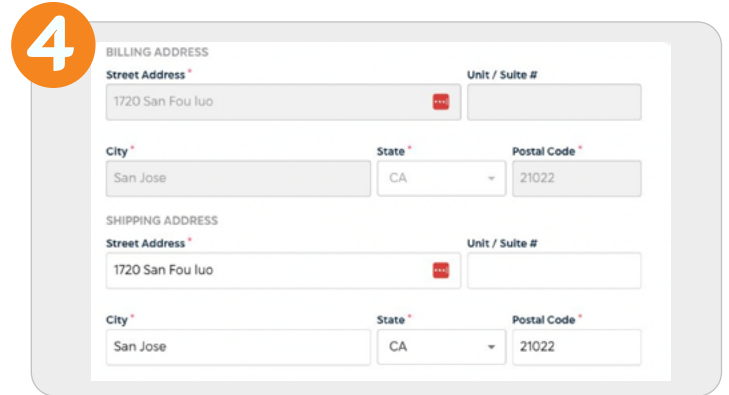
2 OPEN THE ADD CARDHOLDER FORM

Click **+ Add New Cardholder** in the top right of the page to open the form.



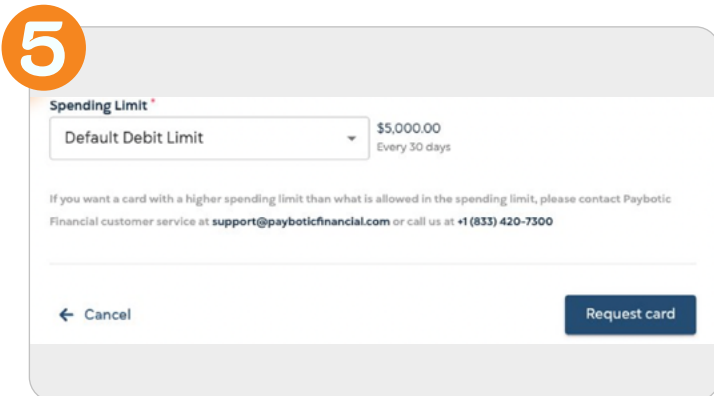
3 PICK CARD TYPE & CARDHOLDER

Select **Physical** or **Virtual**. Then choose **Add new user** and fill in name, email, and phone — or pick from Existing authorized user.



4 CONFIRM THE ADDRESSES

Enter the **Billing Address**. For **Physical** cards, also confirm the **Shipping Address** — that's where the card mails to.



5 PICK A SPENDING LIMIT & SUBMIT

Choose a saved **Spending Limit** from the dropdown, then click **Request card**. Need a higher cap? Contact support.

WHAT HAPPENS NEXT

THE CARDHOLDER TAKES OVER

- **Verification email sent.** The new cardholder receives an email to verify their address and access their card.
- **Card delivery.** Virtual cards are issued instantly. Physical cards mail to the shipping address.
- **Hand off Guide 04 (Physical) or Guide 05 (Virtual).** Walk new cardholders through activation and Apple Pay / Google Pay setup.

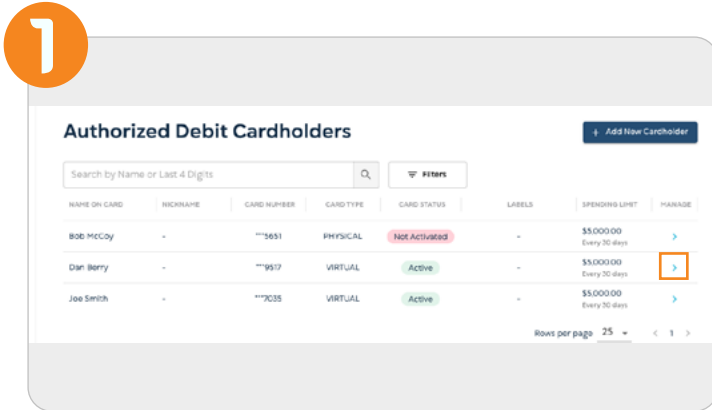
FOR ACCOUNT ADMINISTRATORS

ADMIN CARD CONTROLS

Once cards are issued, you stay in control. Freeze a lost card, terminate a stolen one, change a cardholder's spending limit, or rename the card - all from the Manage Cardholder view.

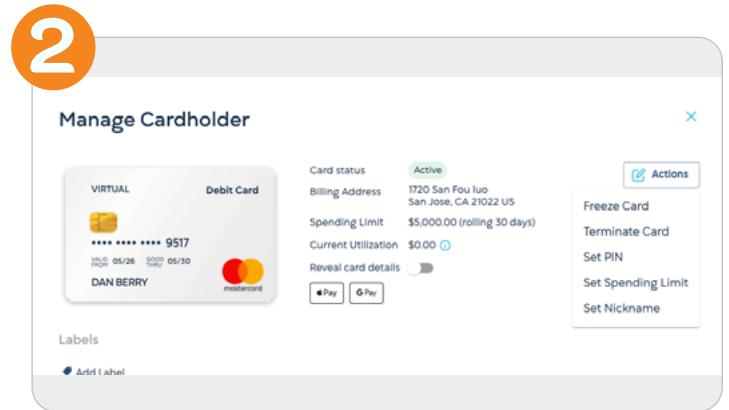
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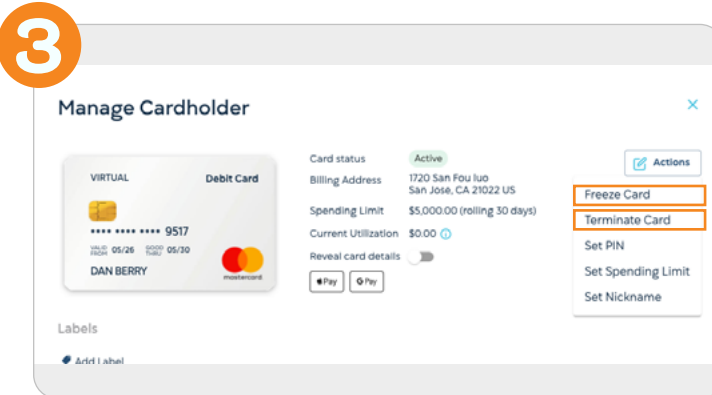
1 OPEN THE CARDHOLDER

From **Authorized Cardholders - Cardholders**, click the blue > arrow on the row of the cardholder you want to manage.



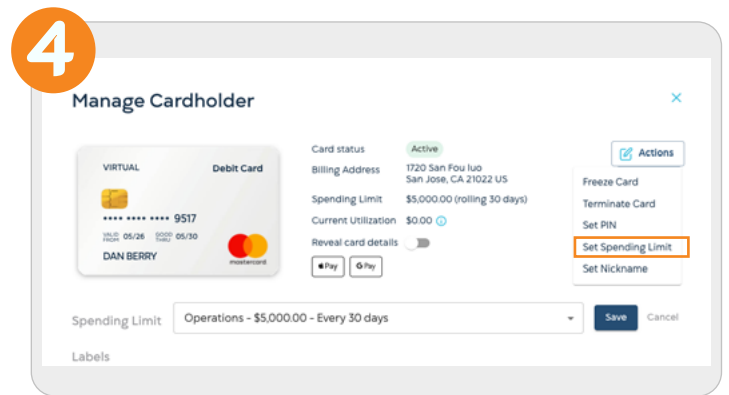
2 OPEN THE ACTIONS MENU

On the **Manage Cardholder** view, click **Actions** to see all five admin controls — Freeze, Terminate, Set PIN, Set Spending Limit, Set Nickname.



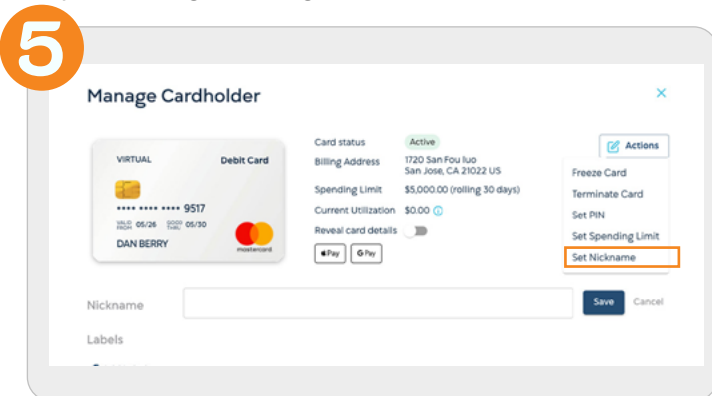
3 FREEZE OR TERMINATE THE CARD

Freeze Card blocks new charges and is reversible — use it for lost cards. **Terminate Card is permanent** and can't be undone — use it only when retiring a card for good.



4 CHANGE THE SPENDING LIMIT

Click **Actions - Set Spending Limit**. An inline form opens — pick a different saved limit from the dropdown and click Save.



5 RENAME THE CARD

Click **Actions - Set Nickname**. Enter a memorable name (e.g., "Sarah Travel" or "Marketing Q4") and click **Save**. Nicknames show in the cardholder list.

OTHER ADMIN POWERS

MORE FROM THE ACTIONS MENU

- **Set PIN remotely.** Useful when shipping a new physical card with a pre-set PIN — also in the Actions menu.
- **Track real-time spend.** Each cardholder's Current Utilization updates with every transaction.
- **Issue another card?** See Guide 02 — Adding a Cardholder.
- **Need help?** Contact Paybotic Financial support — see footer.

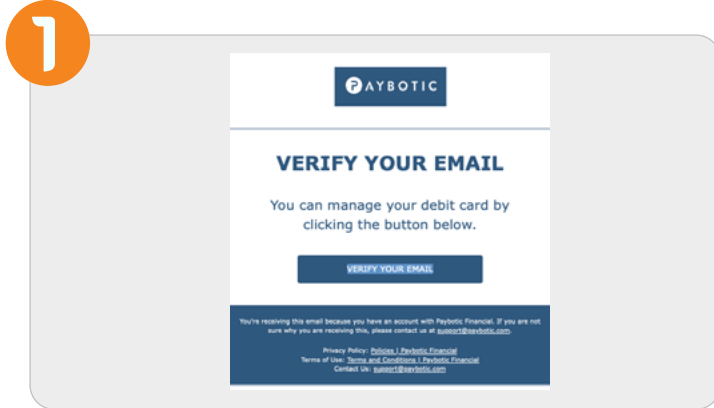
FOR CARDHOLDERS

ACTIVATING YOUR PHYSICAL CARD

Once your physical Paybotic Financial card arrives in the mail, start with the welcome email from support@payboticfinancial.com. Verify your email, set a password, sign in, and activate your card — all from one place.

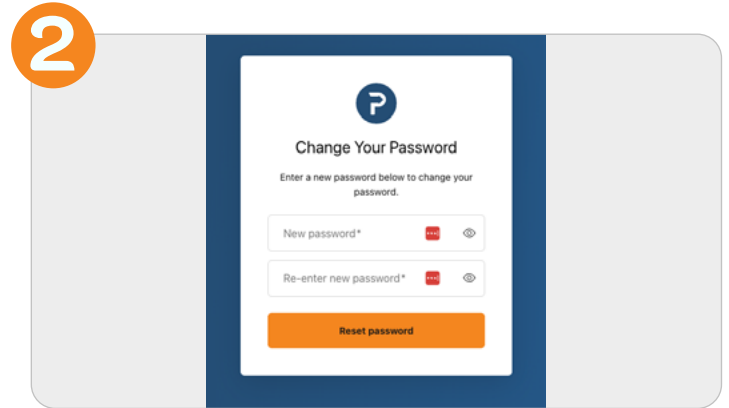
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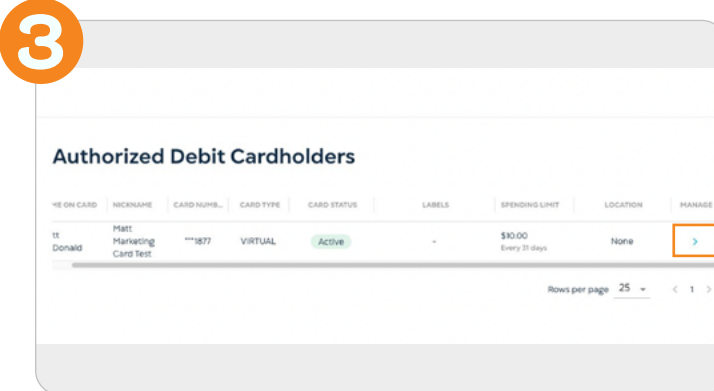
VERIFY YOUR EMAIL

Open the email from **support@payboticfinancial.com** with the subject "Access your Paybotic Financial Debit Card today". Click **VERIFY YOUR EMAIL**.



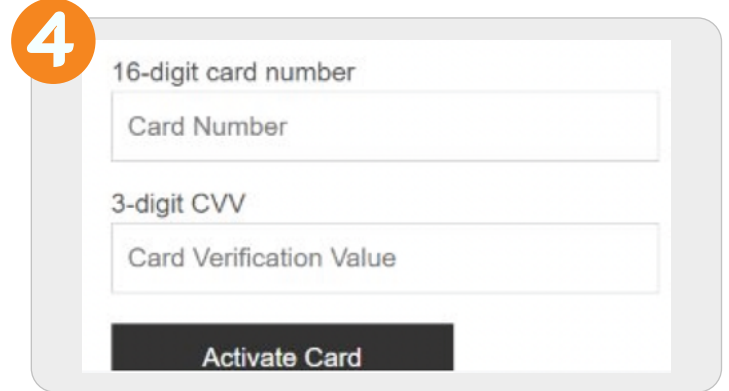
SET YOUR PASSWORD

On the **Change Your Password** page, enter a strong password, confirm it, and click **Reset password**.



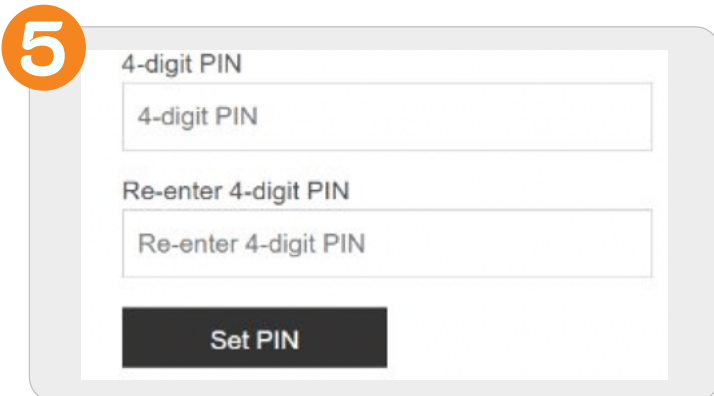
OPEN YOUR CARD DETAILS

Sign in at **app.payboticfinancial.com**. On the **Authorized Cardholders** page, click the carrot (>) in the **Manage** column.



ENTER YOUR CARD DETAILS

In the **Your Debit Card** view, click **Actions / Activate Card**. Type the **16-digit number** (front of card) and **3-digit CVV** (back), then click **Activate Card**.



SET YOUR PIN

Choose a memorable 4-digit PIN (avoid 1234, 0000, or your birth year), re-enter to confirm, then click **Set PIN**.

WHAT'S NEXT

YOUR CARD IS READY

Status switches to **Active** right after activation. Insert, tap, or swipe at any merchant.

For online purchases or mobile wallets, open **Your Debit Card** and toggle **Reveal card details** to see your full PAN, expiry, and CVV. You can also add the card to Apple Pay or Google Pay from there.

KEEP YOUR PIN PRIVATE

Paybotic Financial will never ask for your PIN. Don't share it with anyone.

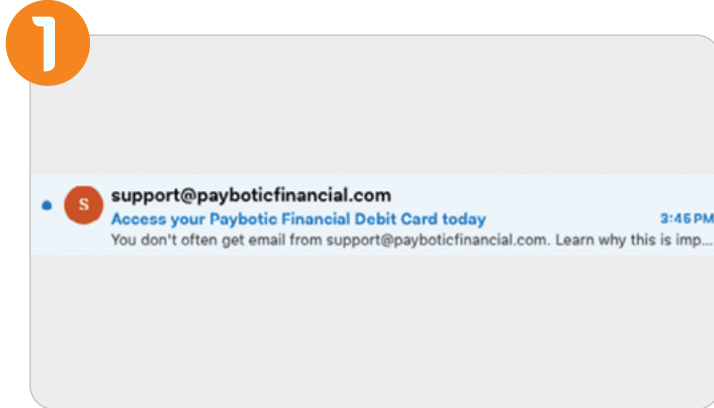
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ACTIVATING YOUR VIRTUAL CARD

Welcome! Your administrator has issued you a Paybotic Financial virtual corporate card. Here's how to verify your email, set a password, and start using your card — in 5 steps.

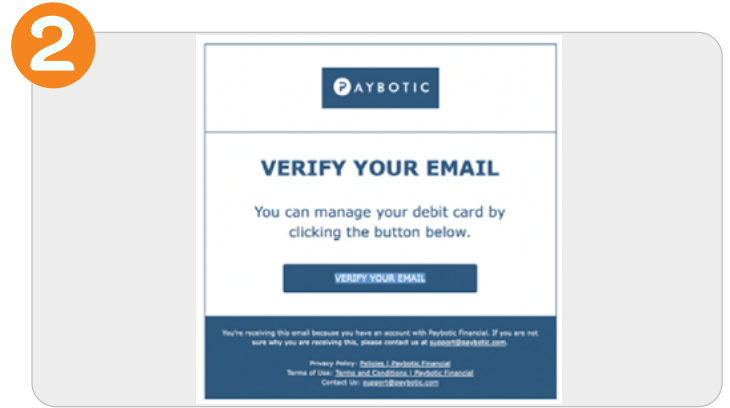
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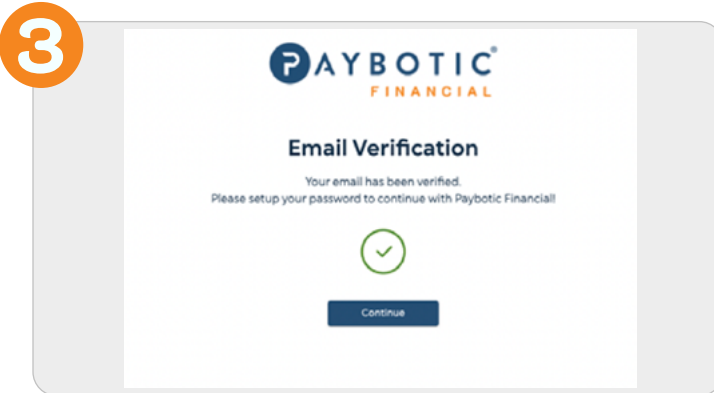
WATCH FOR THE EMAIL

Look for an email from support@payboticfinancial.com with the subject Access your Paybotic Financial Debit Card today.



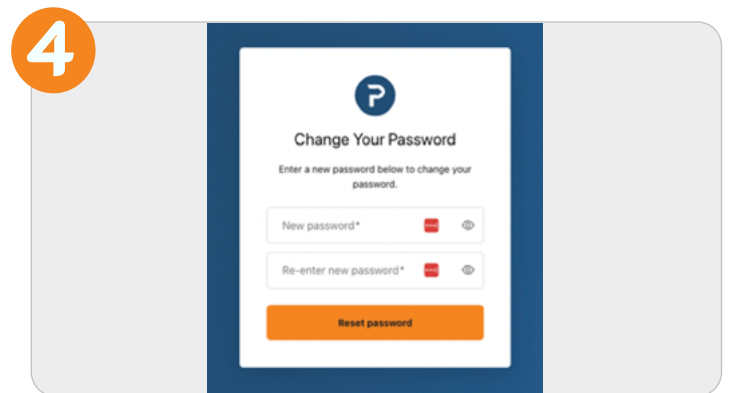
CLICK "VERIFY YOUR EMAIL"

Open the email and click the VERIFY YOUR EMAIL button to confirm your address.



CONFIRM VERIFICATION

You'll see a confirmation page — "Your email has been verified." Click Continue to set up your account.



SET YOUR PASSWORD

Enter a new password, confirm it, and click Reset password. Use something strong — a passphrase or password manager works best.



SIGN IN & ACCESS YOUR CARD

Sign in with your new password, find your card in the list, and click the > arrow to under manage to open it. You'll see your card details, status, and spending limit — all in one place.

WHAT'S NEXT

USE YOUR CARD

Reveal card details. Toggle Reveal card details to see your full card number, expiration, and CVV for online purchases.

Add to your wallet. Tap the Apple Pay or Google Pay button to add the card to your phone for tap-to-pay.

Use it right away. Virtual cards work for online purchases as soon as you reveal the details.

Need help? Contact your account administrator or Paybotic Financial support.

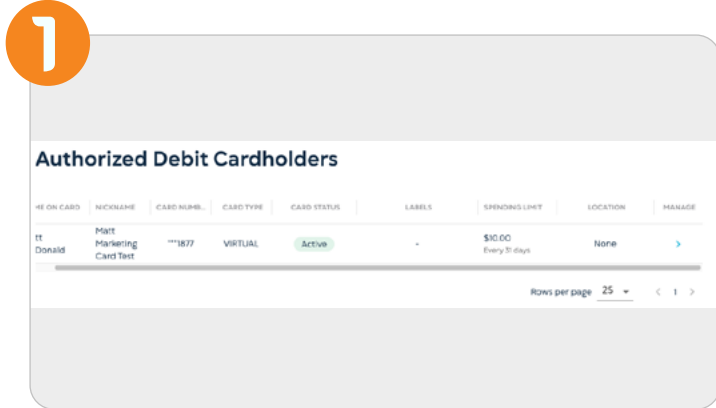
FOR CARDHOLDERS

MANAGING YOUR CARD

Now that your Paybotic Financial card is activated, here's how to use it every day - reveal details for online purchases, add to your phone wallet, freeze if lost, and set your PIN.

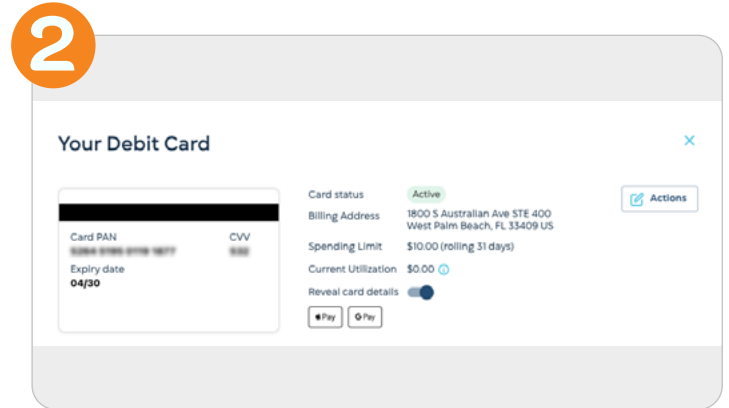
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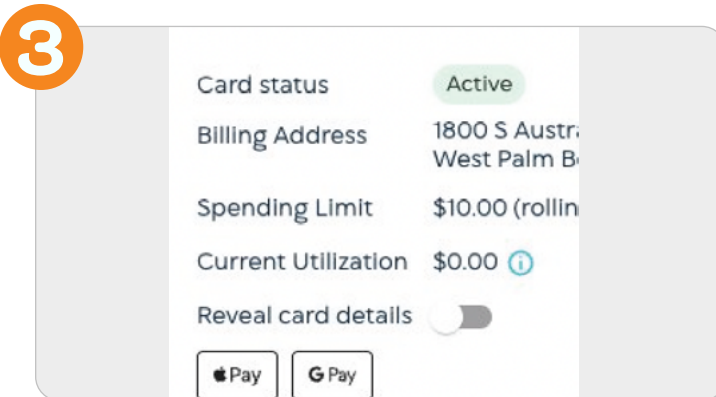
FIND YOUR CARD & OPEN IT

Sign in to your account. You'll land on **Authorized Cardholders** with your card listed. **Click the blue > arrow** at the right of your row to open it.



REVEAL DETAILS FOR ONLINE USE

Toggle **Reveal card details** to see your full **card number, expiry, and CVV**. Use these to pay online or set up a recurring vendor.



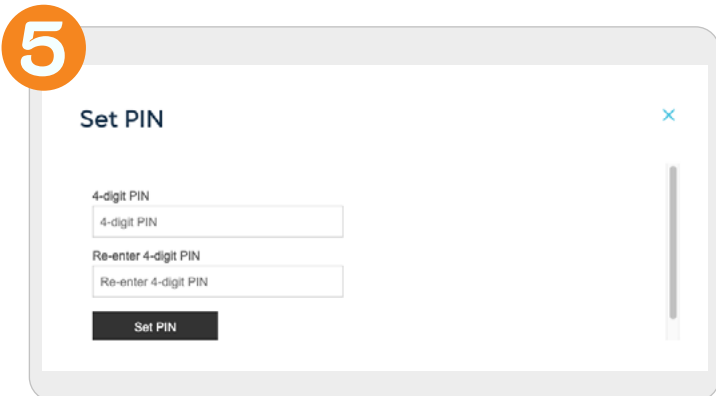
ADD TO YOUR PHONE WALLET

Tap the **Apple Pay** or **Google Pay** button to add your card to your phone for tap-to-pay. Your phone walks you through verification.



FREEZE YOUR CARD IF LOST

Click **Actions**, then **Freeze Card**, to immediately block any new charges. Click again to unfreeze when you find it.



SET OR CHANGE YOUR PIN

Click **Actions - Set PIN**. Enter a 4-digit PIN, confirm it, and click **Set PIN**. Use this PIN at ATMs and chip terminals.

OTHER THINGS YOU CAN DO

MORE FROM YOUR CARD VIEW

- **View transactions.** Posted and pending charges appear at the bottom of your card view, refreshed in real time.
- **Track utilization.** Watch Current Utilization climb against your Spending Limit as you spend.
- **Bigger changes** (terminate, raise your limit, rename) — contact your account administrator.
- **Need help?** Reach out to Paybotic Financial support — see footer.

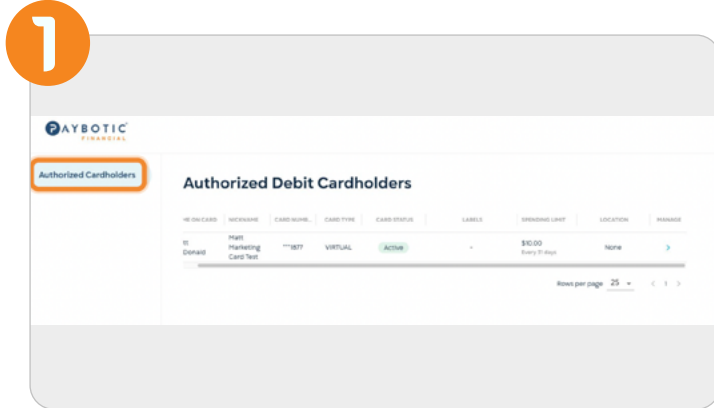
FOR CARDHOLDERS

UPLOADING RECEIPTS

Attach a receipt to any posted transaction. Uploaded receipts stay linked to the transaction, making expense reports and bookkeeping easier later.

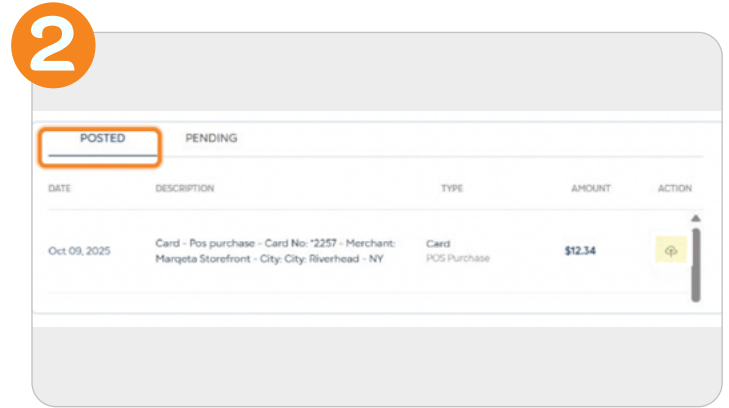
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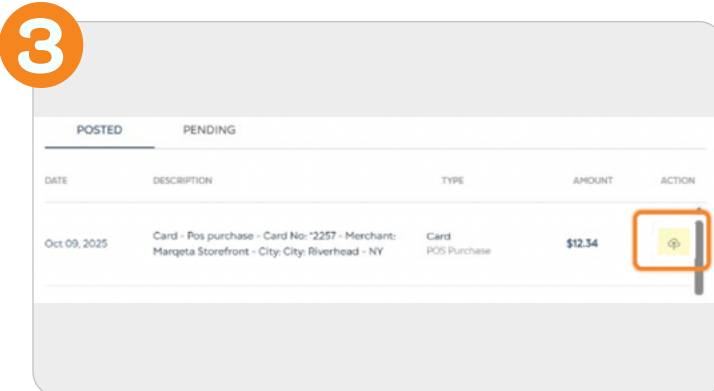
1 OPEN YOUR CARD DETAILS

From the **Authorized Cardholders** page, click the blue carrot (>) in the Manage column to open the Your Debit Card panel.



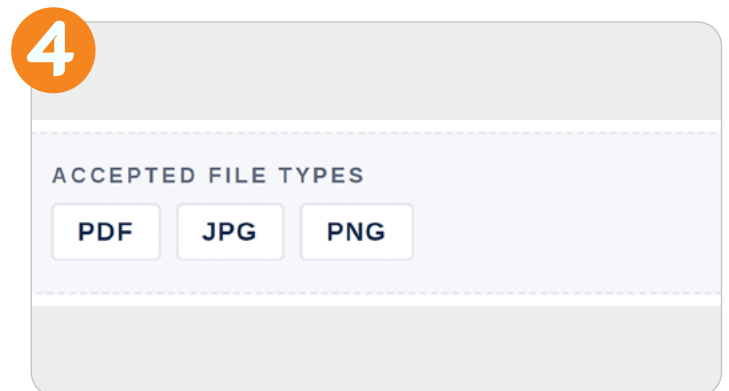
2 OPEN THE POSTED TRANSACTIONS

Scroll down to the **Transactions** section and make sure the **POSTED** tab is selected.



3 CLICK THE UPLOAD ICON

Find the transaction in the list. In the **Action** column, click the **upload icon**.



4 CHOOSE YOUR RECEIPT FILE

Select the receipt file from your device. It attaches to the transaction immediately — no separate save step.

TIPS FOR GOOD RECEIPTS

Capture everything — date, amount, merchant name, and any tax should all be readable in the photo.

Save digital receipts as PDFs — email confirmations work great. Save them to your phone before uploading.

One receipt per transaction — match each upload to the right charge in the Posted list.

WHAT'S NEXT

RECEIPTS & EXPENSE REPORTING

Attached receipts stay with the transaction permanently and are visible to your admin as well.

Come back later to view or download any receipt you've uploaded — handy for expense reports and audits.

PRO TIP

Upload as soon as you make the purchase — much easier than tracking receipts down weeks later.

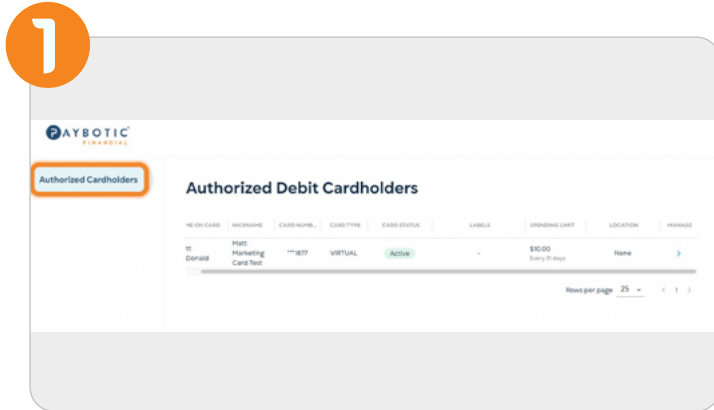
FOR CARDHOLDERS

DOWNLOADING STATEMENTS

You can download monthly statements for your Paybotic Financial card directly from the Banking Portal. Statements generate monthly and are available as PDFs from the **Your Debit Card** view.

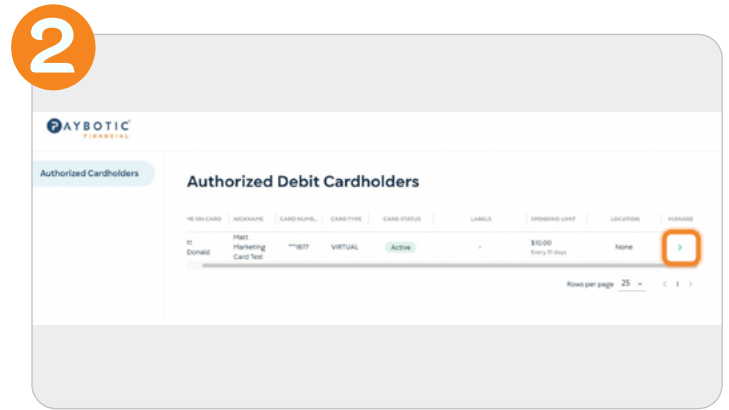
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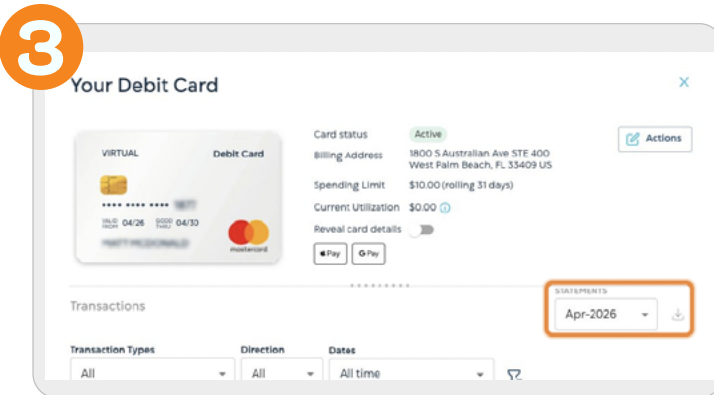
OPEN AUTHORIZED CARDHOLDERS

After signing in to the Banking Portal, you'll land on the **Authorized Cardholders** page with your card listed.



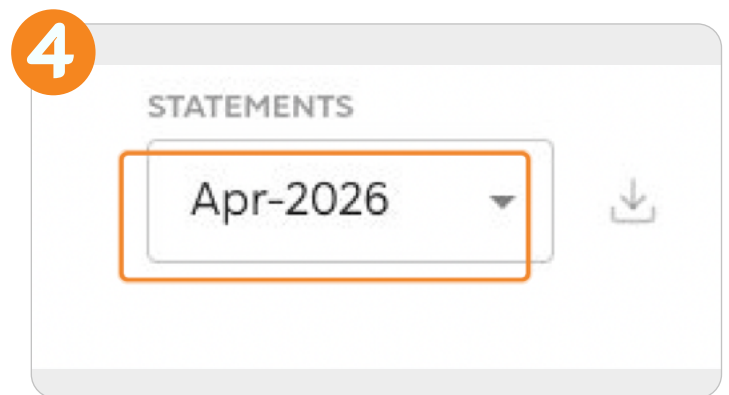
CLICK THE MANAGE CARROT

In the **Manage** column for your card, click the blue **carrot** (>) to open your card details.



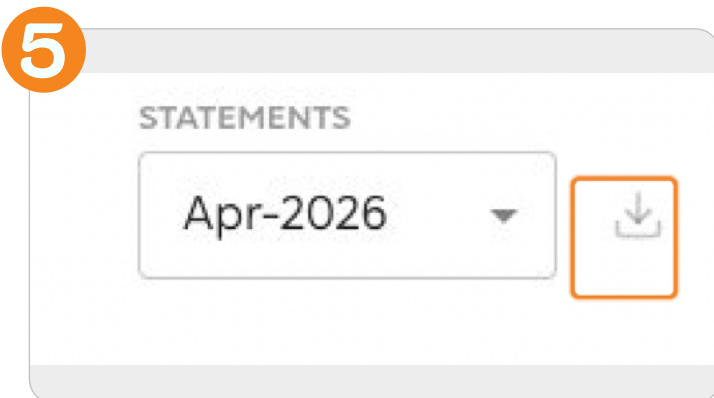
FIND THE STATEMENTS WIDGET

In the **Your Debit Card** panel, locate the **Statements** section, in the upper-right area.



SELECT A STATEMENT PERIOD

Click the **Statements** dropdown and choose the month you want to download.



DOWNLOAD THE STATEMENT

Click the **download icon** to the right of the dropdown. The statement saves as a PDF.

WHAT'S NEXT

STATEMENT AVAILABILITY

Statements generate monthly and become available within the first few business days after each billing cycle closes. If a recent period isn't in the dropdown, the cycle hasn't closed yet — check back after the next monthly close.

PRO TIP

Statements show all transactions, fees, and balances for the period. Save them for your records or expense reports.