

# UMB Commercial Card Mobile App

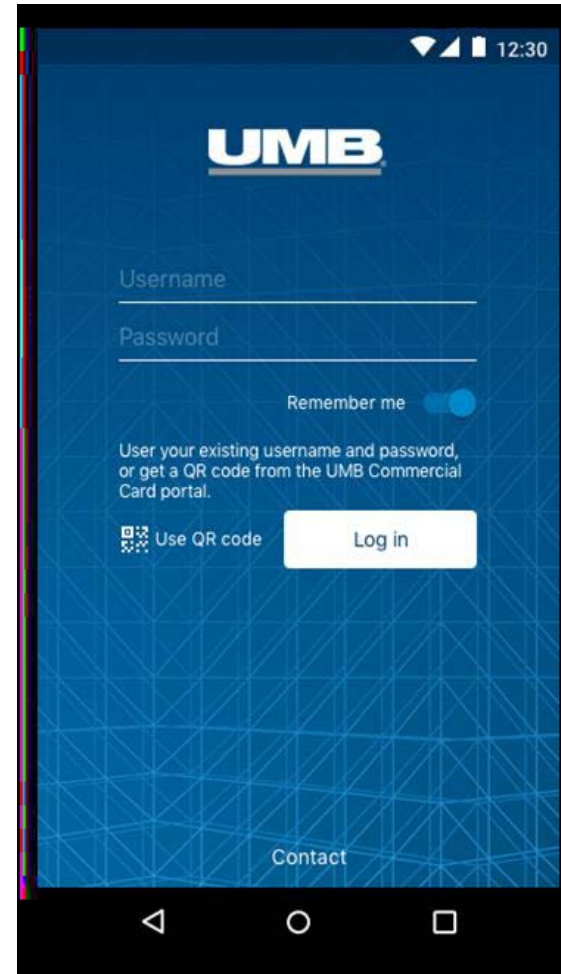
*Cardholder Walkthrough*

**UMB Commercial Card - Sales Team Presentation**

Preview of Mobile App

## AUTHENTICATION:

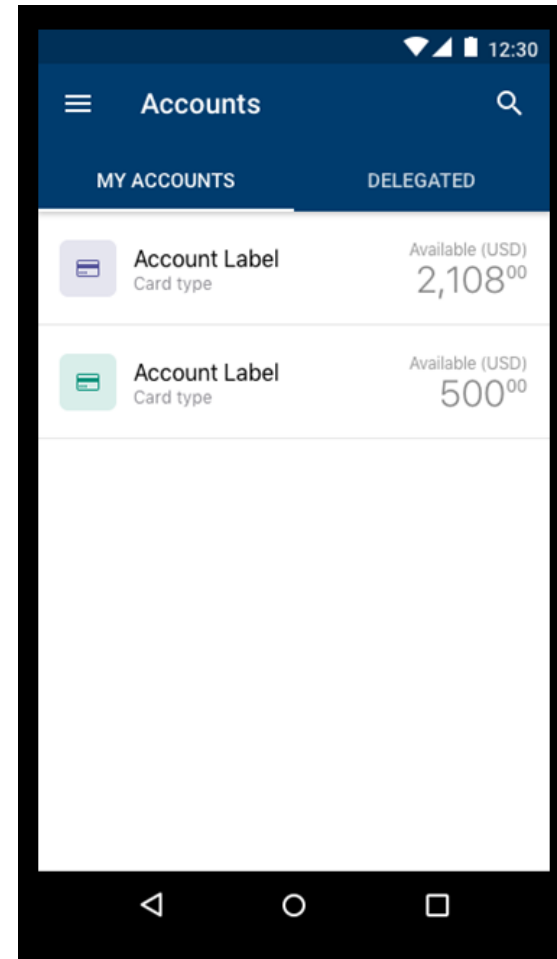
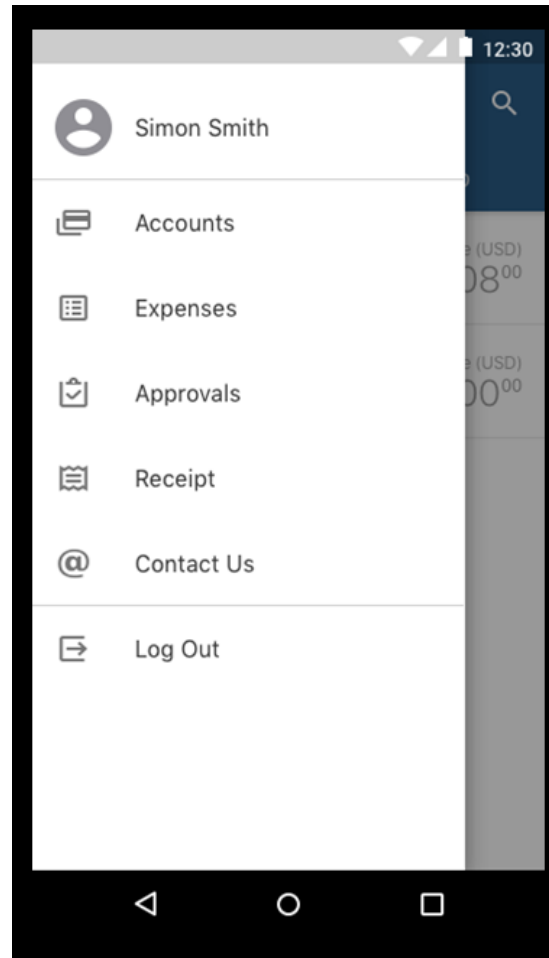
- Log-in with the same Username and Password as the UMB Commercial Card website
- Designate a PIN for quick access
- Register your mobile device within the UMBCC platform with a QR Code



# Mobile App: Account Details

## ACCOUNTS:

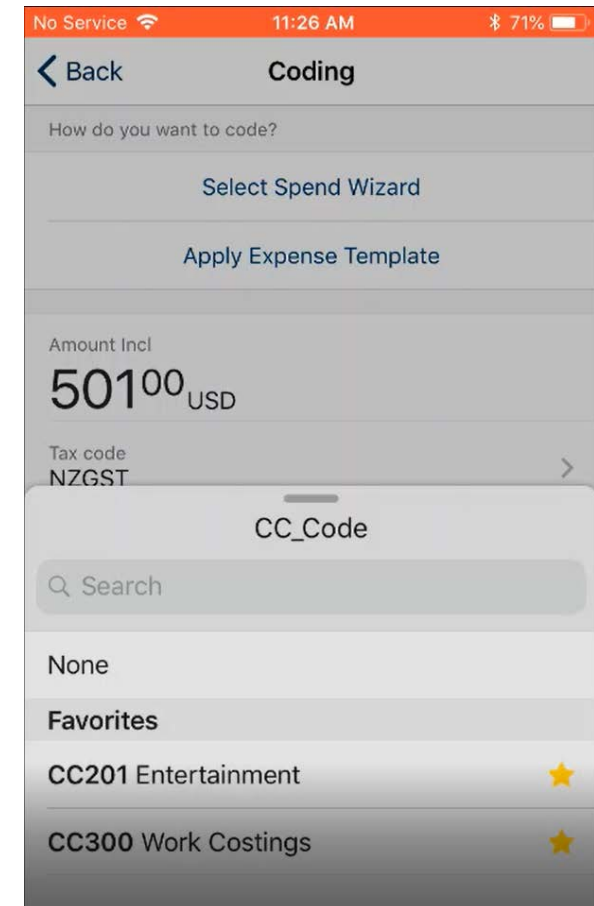
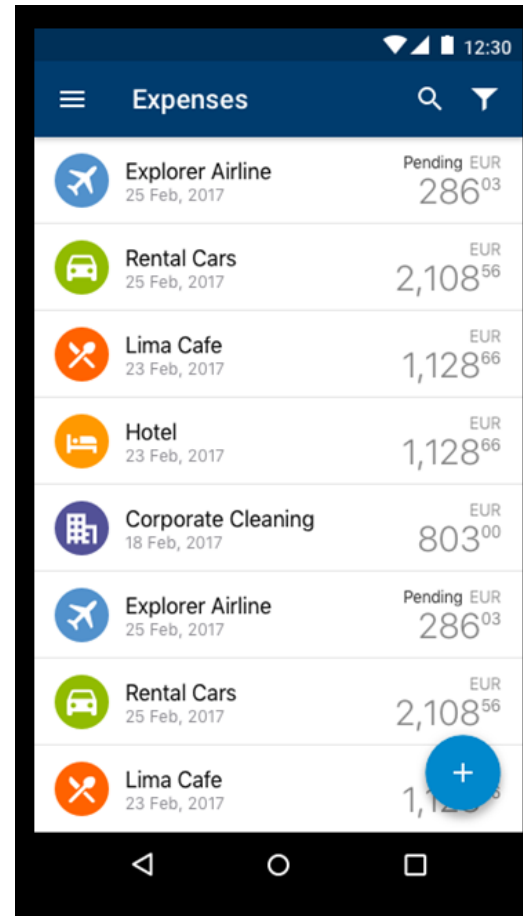
- View all active/mapped card accounts
- Search for a specific account if multiple cards are active
- View account details:
  - Credit Limit
  - Balance
  - Amount Due & Due Date



# Mobile App: Expenses

## EXPENSES:

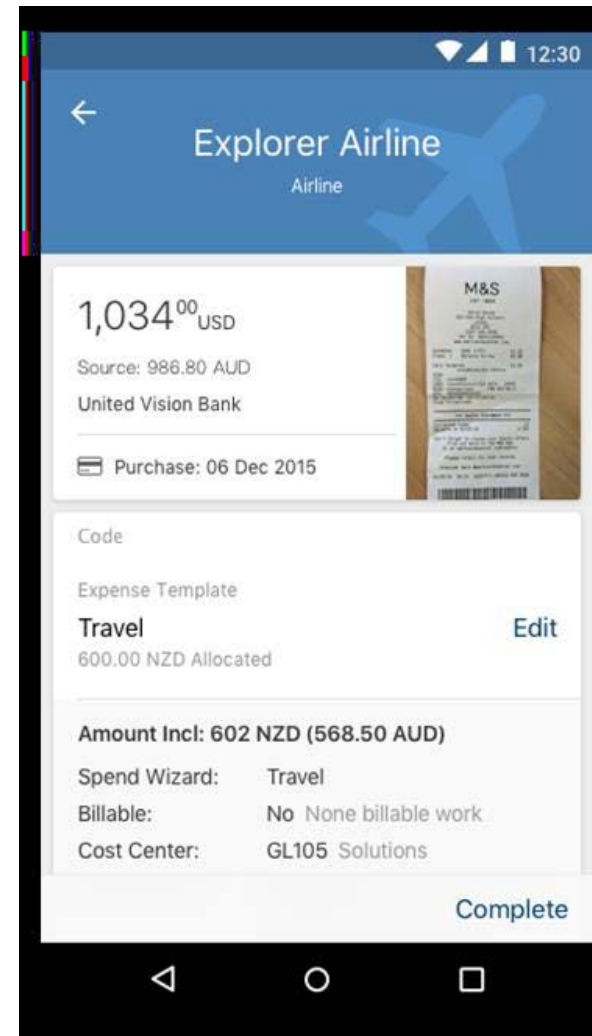
- Review transactions posted to account
- Create cash expenses
- Filter expenses by status
- Select an expense for more details
- Apply expense template or code transactions
- Submit expenses for approval



# Mobile App: Receipts

## CAPTURE AND ATTACH RECEIPTS:

- Take photos with your mobile device
- Attach receipt images directly to expenses
- Access image gallery
- Ease of use - eliminates the need to e-mail receipts to image vault



# Mobile App: Compare to Coding Online



Transaction: Details

Debit Adjustment: 04/08/2019  
Amount: \$3.50 USD  
Post A Sale

Advanced **Coding** Approval Summary

* Location	* GL Account	Group	Amount Incl	Tax Code	
Line 1 <input type="checkbox"/>	4	5	100	3.50	N/A
Line 2					
Line 3					
Line 4					

More.. Balance 0.00

Supplier Details Receipt  Dispute with UMB

Debit Adjustment

Reason for Expense  
Pizza and soda for meeting

Transaction and merchant details

Coding

Description/Reason for expense

← Debit Adjustment

3<sup>50</sup> USD  
UMB Bank

Debit Adjustment: 04/08/2019

Have you attached a receipt?  
Yes

Coding  
Your coding is complete **EDIT**

Supplier Details  
**Debit Adjustment**  
Reason for Expense  
Pizza and soda for meeting

**UMB**

Count on more.®

**UMB**