CUSTOMER SUPPORT

Hours: 6am-10pm PST weekdays,
8am-10pm PST weekends and
holidays

Phone number: **(833) 228-2044**

Email: **support@brex.com**

Support Knowledge Base:
support.brex.com/hc/en-us

BREX

Onboarding Guide

Welcome to Brex, the corporate card for startups and innovative companies.

The following guide includes account setup instructions and recommendations to ensure you get the most value and efficiency possible out of your card usage.

Cardholders

Creating an Account

Accessing the Virtual Card

User Limit Overview

Receipt Management

Cardholders

Creating an Account

Your account administrator will first need to send you an invitation. The invite will arrive via email, and include a link to create your account.

Enter all of the relevant information and order a physical card if appropriate. Then...you're in!

Accessing the Virtual Card

You can access your Virtual Card by clicking on the credit card image in the top left-hand corner of your **Brex Dashboard**.

BREX

4859 3210 4366 3456

GOOD THRU 11/20   CVV 456

JOHN BIGGINS
VEYOND INC   VISA

The Virtual Card is designed to be a secure form of payment that cannot be lost or stolen. We recommend using your Virtual Card for all online transactions, and especially for servers, software subscriptions and digital ad campaigns that cannot risk interruption or downtime.

The Virtual Card should be used for any and all online transactions, including Amazon, Lyft/Uber, Airbnb etc. If you're buying something online, use the Virtual Card unless...

Brex advises virtual cardholders not to use your virtual cards for transactions that would potentially require you to present the cards for physical reference. Examples of such transactions include hotels, theater tickets, and car rentals.

User Limit Overview

Your "User Limit" is the amount your account administrator has permitted you to spend in a rolling 30-day window. You can view your User Limit, and your spend status relative to it, on your Dashboard at any time.

YOUR ACCOUNT

30 DAY SPEND

$4,387.34

30 DAY LIMIT

$5,000.00

YOUR SPENDING
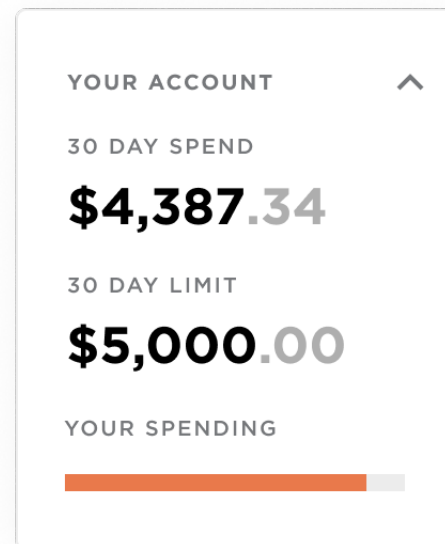
Receipt Management

Brex makes it easy for cardholders to track receipts with automatic receipt matching technology. This is our top-rated feature — employees love saying goodbye to paper receipts for good.

For Transactions placed on a *physical* Brex card — For each time you swipe your physical Brex card, you will receive a text message prompting you to take a photo of the receipt and respond with the photo. The photo of this receipt is then automatically matched to the relevant transaction and stored in your Brex Dashboard.

Note that any given user must be enrolled in SMS notifications to receive this alert.

Transactions placed on a virtual Brex card — For online transactions, your team is likely receiving receipts through email. To attach a receipt received through email, forward this email to **receipts@brex.com**.

Please note that the receipt must be forwarded from the email address you have on file. So if your account is tied to john@brex.com, you cannot forward a receipt from john@gmail.com. However, you can forward an email from john@gmail.com to john@brex.com and then forward the email from john@brex.com to **receipts@brex.com**.

Users may also manually upload a receipt after the fact via the direct upload option contained within the details of every transaction:

Uber		
June 12, 5:59 AM Temur Rayter Rideshare/Taxi Online		$10.11

DETAILS		RECEIPTS	ADD RECEIPT
Purchased at	Oct 25, 9:54 PM	*No receipt attached for this transaction*	
Posted at	Oct 26, 6:54 AM		
Merchant Address	San Francisco	MEMO	ADD MEMO
Website	uber.com	*No memo for this transaction*	
Quickbooks Category	Transportation ⌄		
Points Earned	76.3	REDEEM POINTS	REDEEM
		Redeem points to receive a statement credit	