CUSTOMER SUPPORT

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

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

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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.

Administrators

Administrators

Brex account admins have full permissions, and are able to:

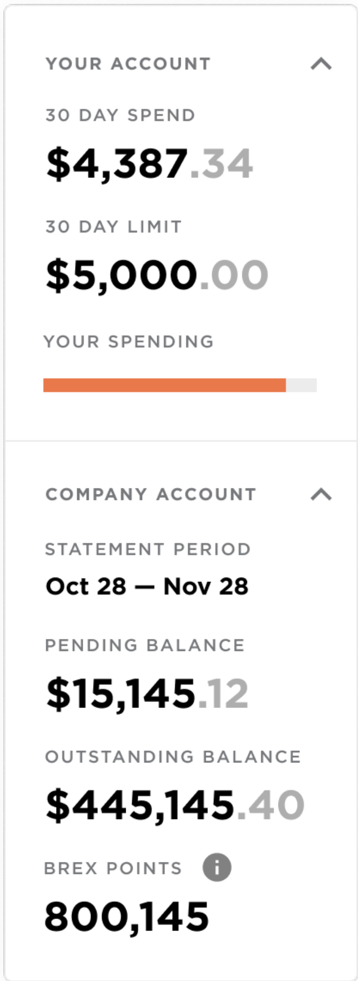
- Invite team members to get cards
- Manage team card limits
- Integrate accounting software and manage integrations
- View company-wide metrics, including all transactions
- Export statements

Account and User Limit Overview

A company's Account Limit is the total amount your entire team *— across all of your cards —* can spend during a given 30-day statement period.

The limit is dynamic and varies depending on your spending patterns and connected bank account balance. It is generally set at 10-15% of your connected bank account balance.

We understand there may be months you need to spend more than your Account Limit allows. At your request, we are able to initiate a payment in the middle of your statement cycle. Once this payment has been completed, your account limit will be restored.



Brex does not currently display your Account Limit, but we do show a range of other metrics.

Under “Company Account”, you can see:

- Your current statement period
- The total of your pending transactions (not yet cleared)
- The total of your cleared transactions, aka Outstanding Balance. This is the amount your team has spent all together during the statement period.
- Your total accrued rewards points

This section is only visible to account administrators and bookkeepers.

If you would like to know your company’s current Account Limit at any given time, or initiate an early payment, please email support@brex.com, or live chat with Brex Support from the chat bubble on the bottom right of every Brex landing and product page.

The “Your Account” section is specific to each user, and visible to non-administrators as well. It displays:

- The total spend on your cards in the past 30 days
- Your “User Limit”, aka the amount you are permitted to spend during a rolling 30-day window.

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.

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, especially for servers, software subscriptions and digital ad campaigns that cannot risk interruption or downtime.

Common examples include Amazon Web Services, Lyft/Uber, Airbnb, Github and LinkedIn.

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

Issuing Cards and Inviting Team Members

Brex makes it easy to issue cards to your entire team — it takes about 10 seconds per new user! This is one of the features our customers love most.

STEP 1 In your Brex dashboard, click your name (top right-hand corner).

STEP 2 Select "Team" from the dropdown menu.

STEP 3 Click on "Send Invites" (top right-hand corner).

STEP 4 Enter the requested information and select the role you would like that team member to have (Admin, User, or Bookkeeper).

STEP 5 Click on "Send Invites."

STEP 6 The invited team member(s) will receive an email from Brex. Advise them to open the email and follow the instructions in order to activate their Brex account.

Updating User Limits

Each member of your team has a “User Limit” — a total they can spend on their cards on a 30-day rolling basis.

Account admins can edit a team member’s User Limit in real time by following the steps outlined below:

STEP 1 In your Brex dashboard, click your name (top right-hand corner).

STEP 2 Select “Team” from the dropdown menu.

STEP 3 Find the user whose limit you would like to update.

STEP 4 Click the pencil icon next to the users current User Limit.

STEP 5 Enter a new User Limit and click “Update”.

Integrating Accounting and ERP Software

Brex integrates directly into Quickbooks, Xero and Expensify to enable automatic reconciliation (which may save your finance team many hours per month).

Please find integration instructions for Quickbooks and Xero here.

And integrations for Expensify here.

Brex Rewards

Brex Rewards is the most valuable card rewards program on the market for companies with spending patterns typical to startups.

Your team earns points with every transaction (1pt/dollar), with multipliers on the following categories:

7x RIDESHARE	**4x** BREX TRAVEL
3x RESTAURANTS	**2x** RECURRING SOFTWARE

* Multipliers are only available to Brex Exclusive customers.

Your points can then be redeemed for statement credit on your Transaction Feed, and flights or hotels through Brex's travel portal.

Please find directions on how to redeem your points here — it's very easy!

We also offer a range of exclusive Partner Offers valued at over $25,000. Please view our website for details.

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.

Transactions placed on a physical Brex card — 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: