

THE FIRST CORPORATE CARD FOR STARTUPS

GETTING STARTED

1. **Log on** to your Brex Dashboard at <https://dashboard.brex.com/login>
2. **Add Users:**
 - a. To invite users, click your name in the top right of the dashboard and select "Team"
 - b. Enter the first name, last name, email address and any desired monthly limit for the cardholder. Note – the monthly limit can be changed at any time
 - c. For "Role," you have the following options:
 - i. Admin – Receives virtual and physical card, and has access to all statements and accounting integrations
 - ii. Regular – Receives virtual and physical card (if desired) but has no access to invite other users or see other statements
 - iii. Bookkeeper – Does not have any card, but has access to see all statements and accounting integrations
 - d. After specifying the request information, click "Send Invites" to invite the additional user
3. **Virtual card:** Click the card icon at the top of the dashboard
 - a. Works in the exact same way as physical cards, except they are used only for online purchases. Numbers are entered rather than swiped / read from a chip
 - b. When "Show" is selected, the full card number is exposed to the user
 - c. Can never be lost or stolen, so no need to ever replace it if you lose your physical card
 - d. Many users use the virtual card to manage software subscriptions
4. **Physical card:** Your physical card will be delivered to you in the mail to the address you specified
 - a. To activate, please text the last 4 digits of the card to (415) 417-0824. An SMS was sent to you from this number as part of the signup flow.
 - b. Can be used at any card terminal that accepts Visa
 - c. Supports chip or magnetic swipe
5. **Receipt Tracking**
 - a. Email / Online Transactions - All email receipts can be forwarded to receipts@brex.com and they will automatically match to your statement
 - i. Use the same email address associated with your Brex account
 - b. Paper Receipts / In-Person Transactions – Brex will text you from (415) 417-0824 after every in-person transaction prompting you to respond with a photo of your receipt
 - i. You will be alerted once Brex has matched the receipt to the transaction (typically 1-2 minutes)
 - ii. Receipts do not need to be sent in the order they occurred
6. **Accounting Integrations:**
 - a. Click your name in the top right of the statement and select "Integrations"
 - b. Click the accounting software you use and login with your credentials
 - c. Map the Brex categories to the categories that automatically come through from your company's general ledger
 - d. Click "Apply Categories" to categorize the transactions according to the mapping you set up (this only needs to be done once)
 - e. Click "Sync" at the top of the dashboard to integrate with your accounting software
 - f. Anytime you click "Sync," only transactions previously not synced will update into your accounting software
7. **Refer a Friend:**
 - a. Share the great benefits of Brex with another startup and we'll send you both \$100
 - b. You were sent a referral link during your Brex onboarding process
 - c. In case you no longer have that email, your individual referral link is the following hyperlink with your email address appended
https://dashboard.brex.com/signup?ref_code=
 - d. For example, if your email address on file with Brex is john@doe.com, your referral code is:
https://dashboard.brex.com/signup?ref_code=john@doe.com