



# Spender and Manager Guide



9:41  
Good morning  
Joanna Long

Float  
\$53.45

VISA  
Purchasing

Summer parties  
\*\*\*\* 9780

Transactions  
Your transactions are compliant

-\$334.80 CAD  
Pending

ansen Catering  
2023

-\$15.20 CAD

Palace  
2023

-\$271.41 CAD

Morar Entertainment  
July 1, 2023

Float

VISA  
Purchasing



# A Guide to Float for Spenders and Managers

**Wave goodbye to those tedious expense reports and say hello to smarter spending with Float.**

Your company has joined thousands of forward-thinking Canadian businesses who are looking for a smarter, and simpler, way to manage expenses. At Float, we recognize that lengthy spend approval and reimbursement processes can make it difficult for you to get what you need to do your job effectively.

We're here to make it easier for you to make purchases on behalf of the business so you can:

-  Stop spending on your personal credit card
-  Eliminate tedious expense reports and missing receipts
-  Reduce complicated communication around spend approvals



# Sounds great, but what is Float?

**Float is a new kind of corporate card -  
backed by intelligent software.**



## **Smart corporate cards**

Float provides physical and virtual corporate cards in both CAD and USD that are available instantly and can be used anywhere that VISA and Mastercard are accepted.



## **Spend management software**

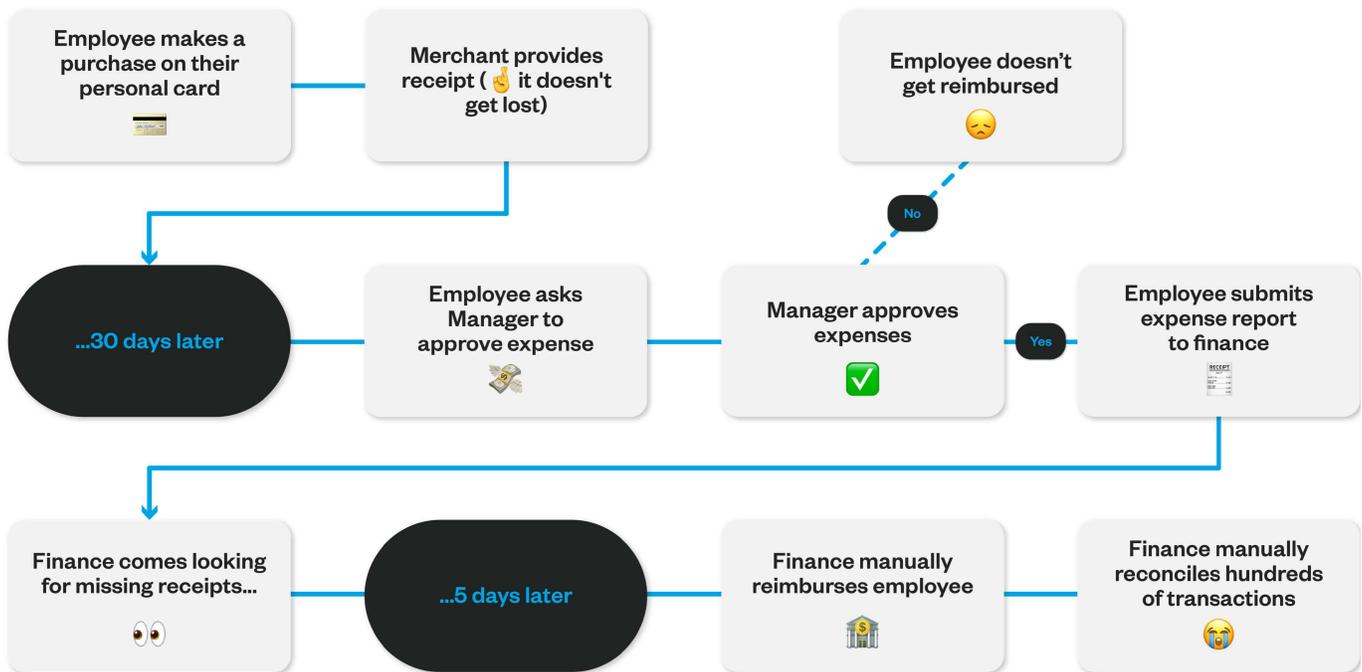
All Float Cards are connected to our spend management software, which means you can place controls directly on your cards, see transactions in real time, and eliminate manual reconciliations.



# Wave goodbye to old spending habits.

## How about this?

Corporate cards workflow before Float.

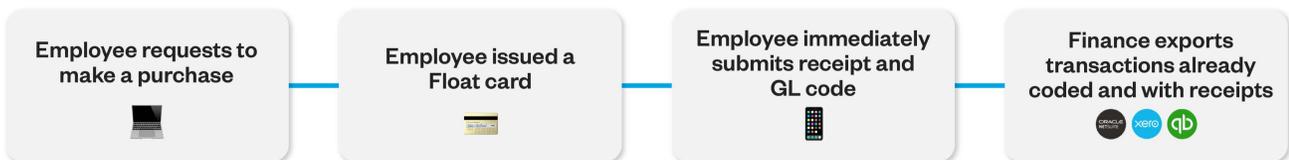




# Wave goodbye to old spending habits. Welcome to the Float way.

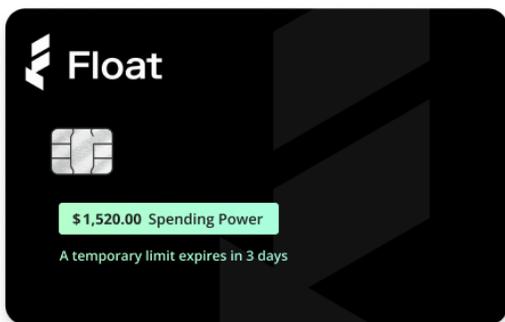
## The Float Effect.

Corporate cards with Float.





# Types of Float Cards



## Physical cards

Float's physical cards are great for on-the-ground expenses like business travel and employee benefits. Your Admin may issue you a Float Card with a \$0 balance, so you request Recurring or Temporary limits when you need to make a purchase. Once approved, funds will be loaded to your card and its balance will increase until limits expire.



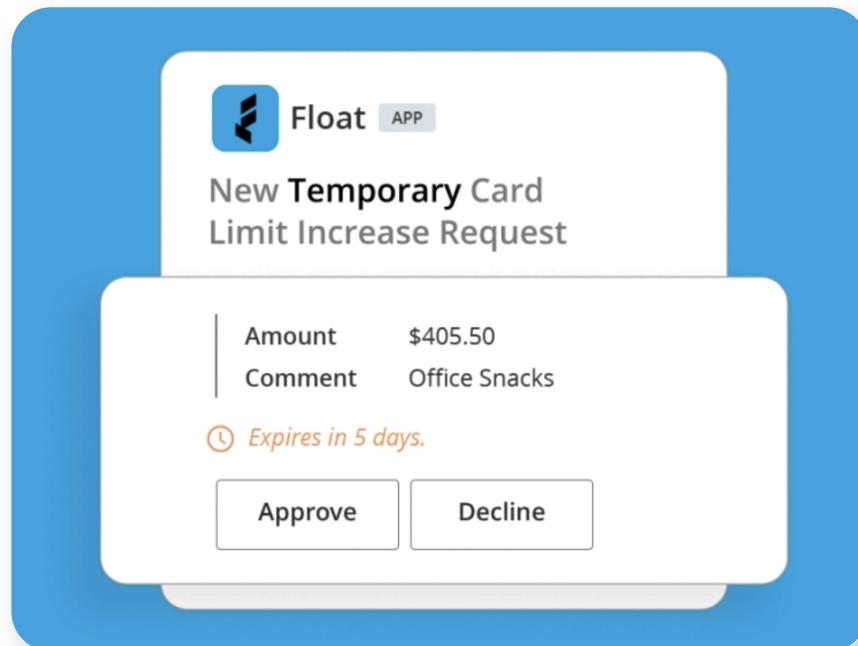
## Virtual cards

If you or your team are in charge of large vendor spending like software subscriptions or advertising budgets, you can request a virtual card for each vendor. By creating Recurring limits for your billing cycles and Temporary limits for one-off increases, you can eliminate overspending and fraud caused by catch-all cards.



# The Float Roles

With Float, team members get assigned unique roles based on the company's reporting structure and expense guidelines. Spenders can request cards and limit increases from their Managers, and in turn Managers can approve, edit, or deny requests. Float makes it easy to get quick approvals in-app and via Slack.





# A step-by-step guide to getting set up in Float

**Automate spend requests and approvals, all within company expense policies**

It can be a little overwhelming to use a new platform. But lucky for you – Float makes things easy breezy! Follow our step-by-step guide so you can start requesting (or approving) spend on Float.

- 1 Set up your Float account**
- 2 Download the mobile app**
- 3 Request to make a purchase**
- 4 Approve (or reject) spend requests**
- 5 Make a purchase with your Float card**
- 6 Submit your receipts**
- 7 Request a limit increase**



# Set up your Float Account

Your Float Admin will send you an email invite to join your Team on Float. Accept the invite and set up your Float password. Once you are logged in, you will be asked to verify your identity - don't worry, it isn't a credit check! Float is required by federal regulations to verify our cardholders' identities.

## You've been invited to join Float



Hi Amy,

Target Marketing has invited you to join Float for a simpler way to manage business spending.

**Activate your Float account now** by clicking the button below and setting your password:

Activate your Float Account



# Download the Float mobile app

## Request new spend on-the-go

Submit new spend and reimbursement requests for approval in a few clicks.

- Request new virtual and physical cards for recurring payments
- Request temporary card limit increases for one-off purchases
- Get fast spend approvals for limits and reimbursements with push notifications

## Make business payments anywhere

From booking travel to a work outing, make business payments hassle-free.

- Swipe through all of the cards issued to you and see available balances at a glance
- Access card details securely to make payments online
- Add cards to your phone's Mobile Wallet to tap to pay

## Get hassle-free policy compliance

Keep tabs on all of your spending at a glance and stay compliant.

- Submit expenses for reimbursement as soon as you spend
- Easily upload receipts to transactions right away
- See which transactions are non-compliant and add missing information from your phone

Download the Float mobile app for free on the App Store or on Google Play.



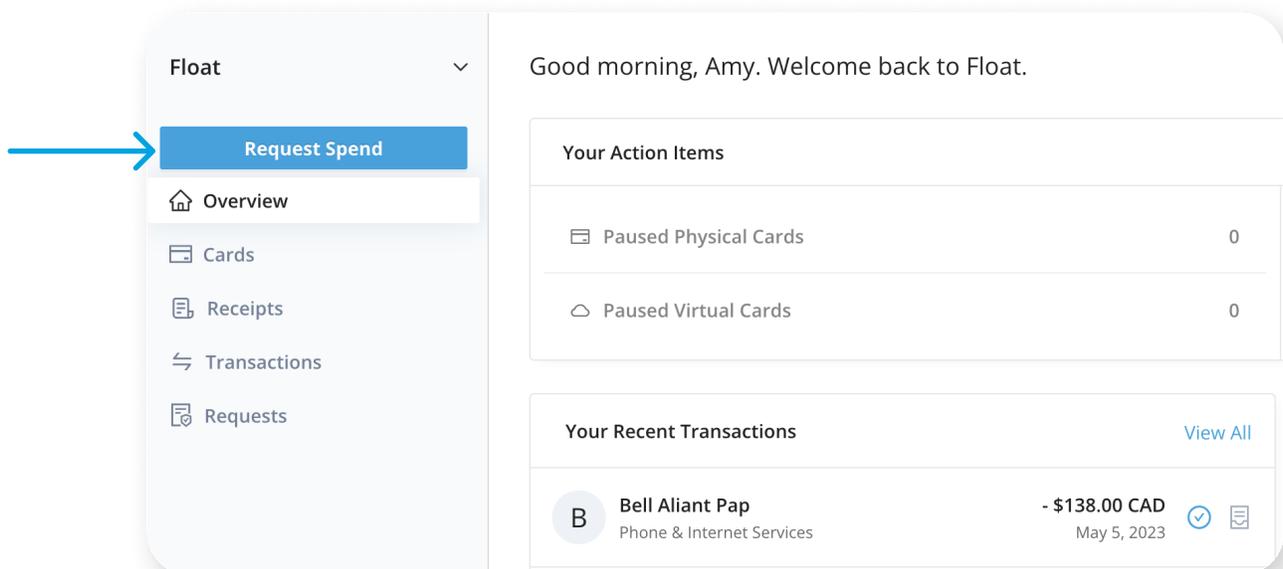


# Request to Make a Purchase

You can easily request spend directly within Float to edit or increase an existing card limit or to have a new virtual card issued to you instantly for your purchase.

Here's how:

1. Click "Request Spend" in the upper lefthand corner of Float. Here, you have the option to select a limit increase to an existing card or a new virtual card.





# Request to Make a Purchase

2. Provide your company with details about what you're planning to purchase, like "Flights for Conference" or "Software Subscription."

### Request Spending

Ask your manager for a new card, a limit increase, or a temporary boost to make a purchase.

#### Request Details

Select Float card

Create a new virtual card

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\* Description

\* Limit type

Recurring  Temporary



# Request to Make a Purchase

3. Choose the type of limit increase and amount you need for your purchase. Recurring limits will reload your card at the chosen interval, while Temporary limits will expire once they are used or the time limit is reached.

4. If requesting a new virtual card, give your new card a name and select the Submission policy that covers your expense type.

\* Description

\* Limit type

Recurring  Temporary

Request a temporary top-up to your card balance for a one-time increase for things like one-time purchases or short-term budget increases.

\* Amount

\* Expires On

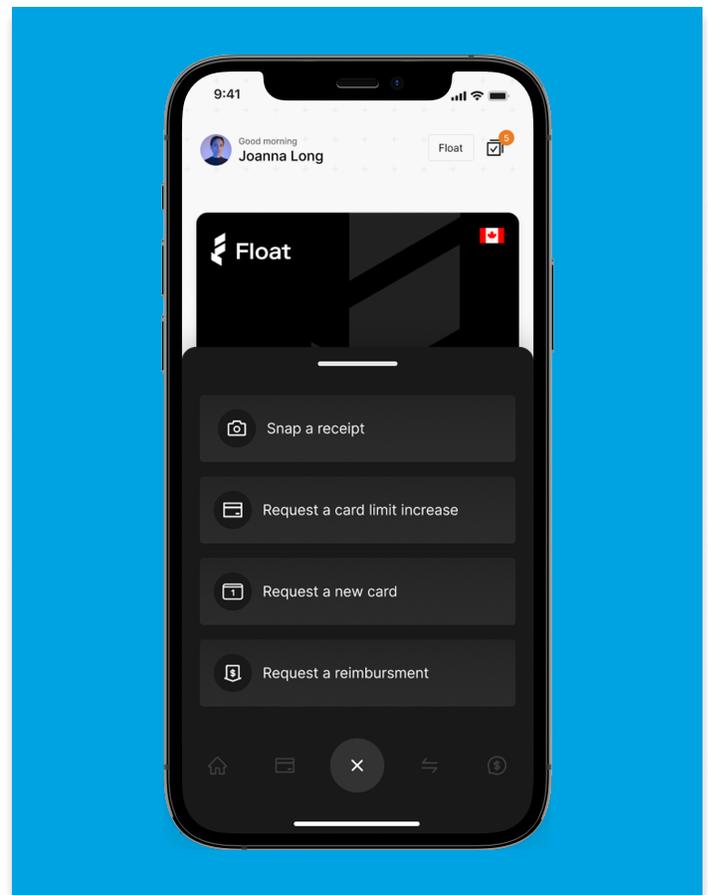


# Request to Make a Purchase

## Request spend on the mobile app

You can also request new cards and card limit increases on-the-go with the Float mobile app.

Simply click the plus sign in the menu at the bottom of the app to get started.

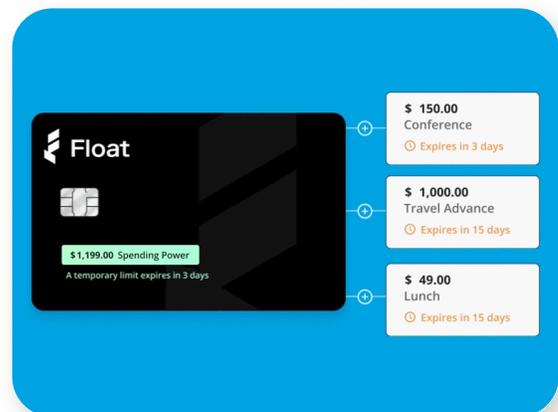




# Float Cards in Action

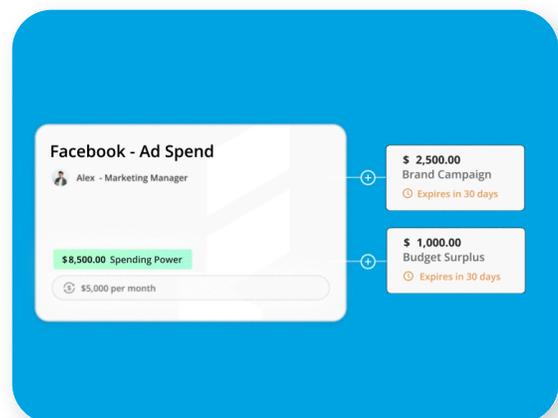
## Team Travel and Expenses

If your admin has assigned you a physical card, you can request temporary limit increases for things like travel advances, lunches, or party supplies 🏠



## Software and Advertising

If you're responsible for large spend amounts, request a virtual card for each vendor and get rid of your catch-all credit card. Request Recurring limits based on your billing or budget cycles, and Temporary limit increases for one-time billing increases. 🏠

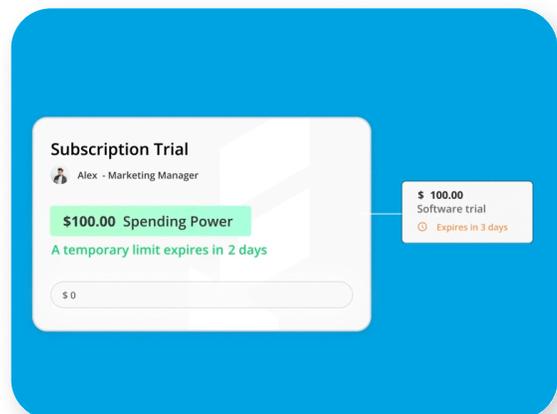




# Float Cards in Action

## One-time Purchases

If you're responsible for large spend amounts, request a virtual card for each vendor and get rid of your catch-all credit card. Request Recurring limits based on your billing or budget cycles, and Temporary limit increases for one-time billing increases. 





# Approve Spend Requests (Managers)

Once a spend request is submitted, it is automatically sent to Managers for approval. Managers are automatically notified once an employee submits a spend request via push notification, email or Slack. Managers can view spend requests details and approve, edit, or reject the request. If approved, the new limit increase will be added to the card's total Spending Power or a new virtual card will be issued.

 **Float** APP 9:25 AM  
New spend request from Amy Fisher [View other requests](#)

**Card Name:** Monthly Ad Sponsorship  
**Amount:** \$100.00 CAD  
**Card Type:** Monthly  
**Comment:** Monthly sponsorship spend for magazine.

[Approve](#) [Decline](#)

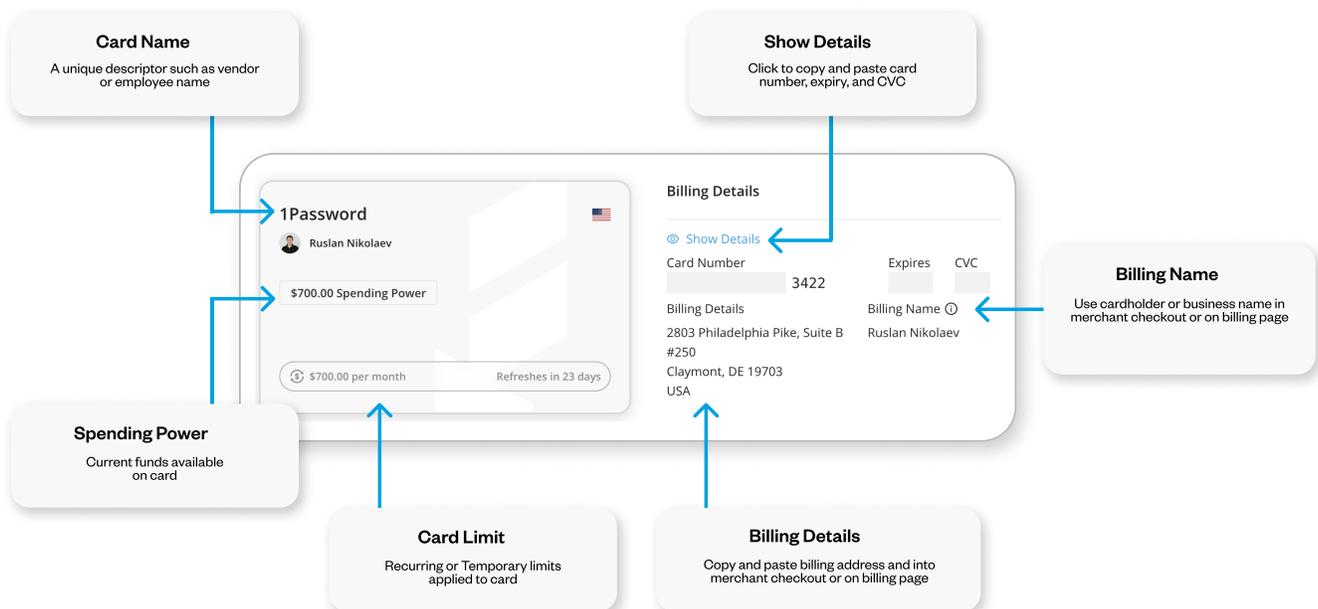
 **Pro tip:** Use our Slack integration for seamless spend requests and approvals.



# Make a Purchase with Your Float Card

You can see all the physical and virtual cards issued to you on the web app's 'Cards' page or on the mobile app homepage after logging in. You can select each card to see the balance, card details, all the transactions made, and which transactions are missing receipts.

If an Admin has issued you a physical card, you'll need to activate it once it arrives. To spend using a virtual card, click on the card to display its details. By clicking the "Show" button, you'll get the card number, expiry date and 3-digit CVC, which you can copy and paste into any website's billing page.



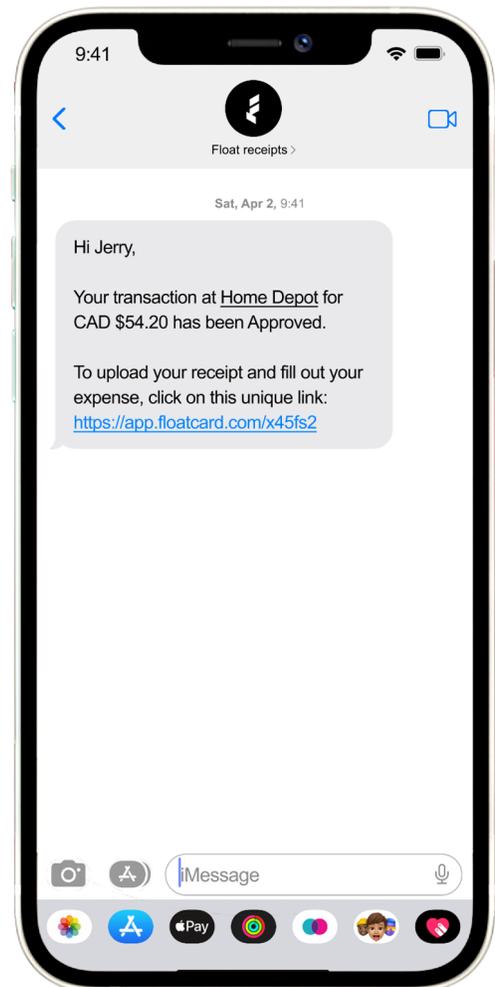


# Submit Your Receipts

Float has the simplest ways to submit your expenses as soon as they are made, eliminating the need for tedious expense reports and back-and-forth with the finance team.

Once you make a purchase using your Float physical or virtual card, you'll be automatically sent a link to upload your receipts and submit all the relevant purchase details.

 **Heads up** - your cards may be temporarily paused if you forget to upload your receipts 😬 To avoid interruptions in your spending, update your mobile number in your Settings page to get SMS notifications while you're on-the-go.





# Request a Reimbursement

If you make a purchase on your personal card instead of a Float Card, you can easily submit out-of-pocket expenses directly in the Float with **Reimbursements**.

Float allows you to simply upload your receipt and expense information, and automatically sends the request to your manager for approval so you can get paid back faster.

Simply log in to Float web app and click Request Spend > Reimbursement or tap the plus button at the bottom menu of your mobile app. Attach your receipt and supporting expense information.

Once submitted, your Manager will be notified right away to approve or decline the request in the Requests > Needs Approval page.

The screenshot shows the 'Reimbursement Request' form in the Float app. At the top left is the Float logo, and at the top right is a blue button labeled 'Reimbursement Request'. Below this is a horizontal line. The form contains three main sections: 'Amount:' with a text input field containing '\$126.00'; 'Receipt:' with a dashed box containing a green checkmark icon, the text 'Receipt captured', and a file name 'Receipt\_20Jun2022\_001028.pdf'; and 'Comment:' with a text input field containing 'Team lunch (forgot my Float Card!)'. At the bottom right of the form is a blue 'Submit' button. Overlaid on the bottom left of the form is a white notification box with a green checkmark icon and the text 'Your request has been submitted for approval!'.



# Download the Float mobile app

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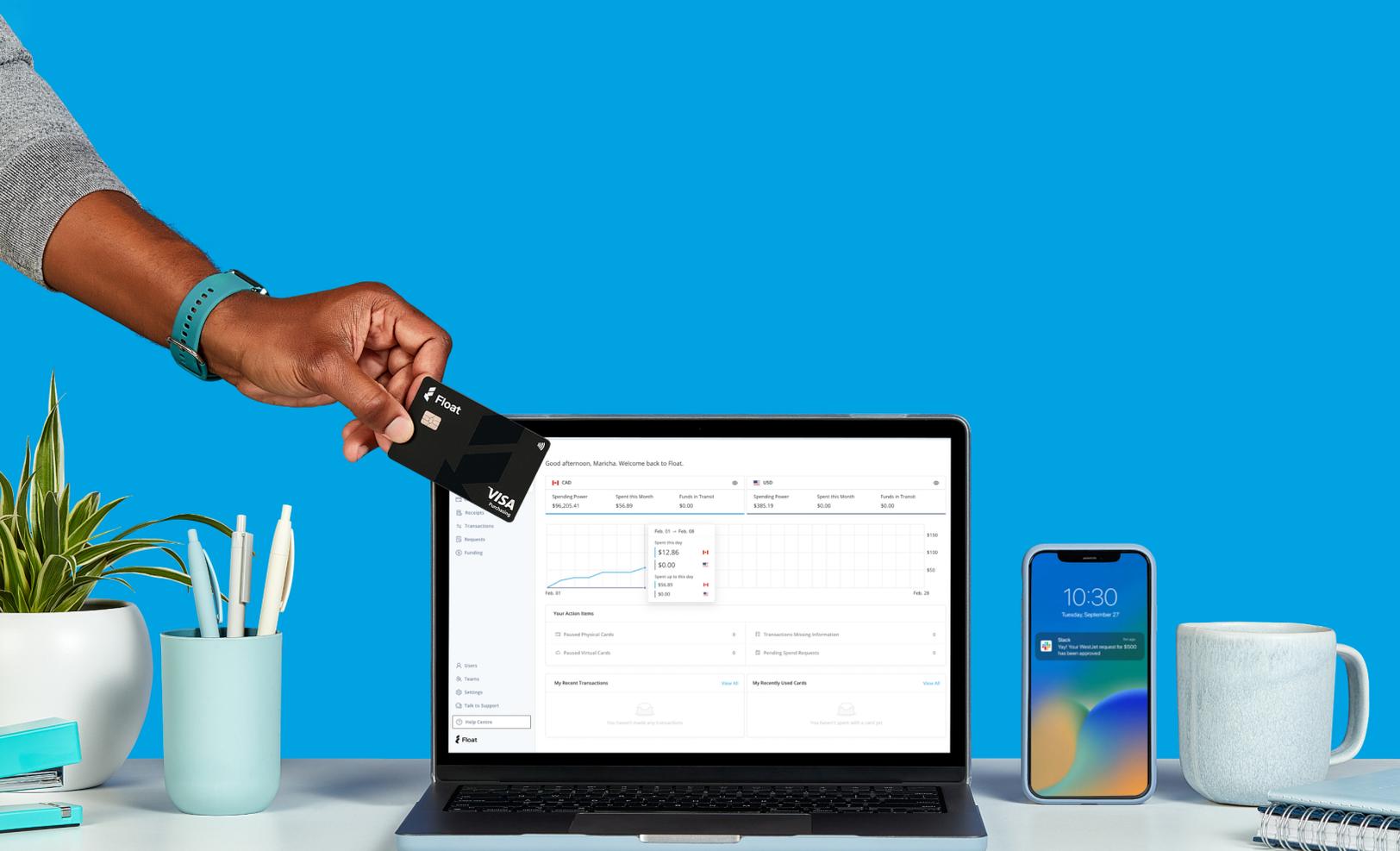
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# Ready to get started?

Log in today to request spend.



\*Some features only available on Float's Professional Plan - learn what's included in your plan [here](#).