

## How to use Spend Insights

Cardholders can view, analyze, and manage their spending trends using **Spend Insights**. Spend insights offers three different views on the card's transactions over a selected month.

What: Displays card transactions in the selected month across all merchants.

**When**: Displays spend trend by month and provides an insight into how the spend has changed over time.

Where: Displays locations where the transactions were made.

## **To Access Spend Insights:**

1. Under Card Details, select Spend Insights.



- 2. The Spend Insights screen will display with the current month's information for the WHAT category. To view various spend insights, select from the available months, and select **WHAT**, **WHEN**, or **WHERE** to view.
- 3. If there are transaction in another country when looking at WHERE, there will be a small flag for the country on the map. Click this flag to view transactions.



- 4. To view more insights on a specific transaction, select the **Transaction**. The Transaction details will provide such as Merchant Information, Transaction Details, and more.
- 5. To tag the transaction in order to categorize as business, personal, or family spend, click **Tag** and select the applicable tag. To add a memo to the transaction, click **Add a memo** and enter the memo regarding the transaction.

< Transaction Details				
<ul> <li>(*)</li> </ul>	Starbucks \$14.07		Merchant Name, logo, transaction amount, Merchant Category, and Transaction Type (in-store, online, etc.), Date and Time of transaction.	
	<b>Restaurant</b> In-Store			
Standard/Classic Secured *0045 Posted			Tue,	<b>Jan 10, 2023</b> 4:10 PM
	☐ Website	_		
STARBUCKS COFFEE #63 ABBOTSFORD, BC, Canada (As seen on statement)		Link to Merchant website (where available), Merchant location and details, Alert/Control details		Show Less
Store Number Terminal ID				63 0004
Reason(s) for Alert			Spend Limits - Per	<sup>-</sup> Transaction
Add a memo				Tag

\*The CardWise platform supports both Mastercard® and Visa\* credit cards issued by Collabria Financial Services. The above instructions apply to both networks.

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