

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.

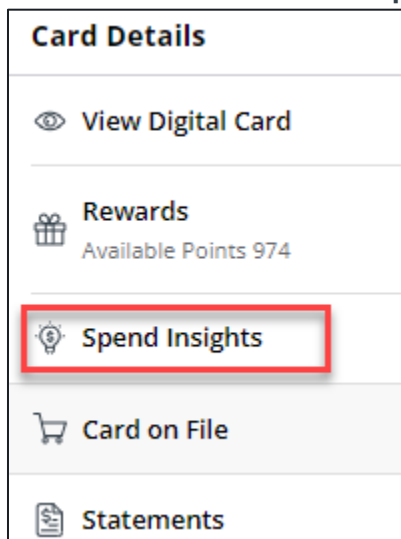
What: Displays card transactions in the selected month across all merchants.

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

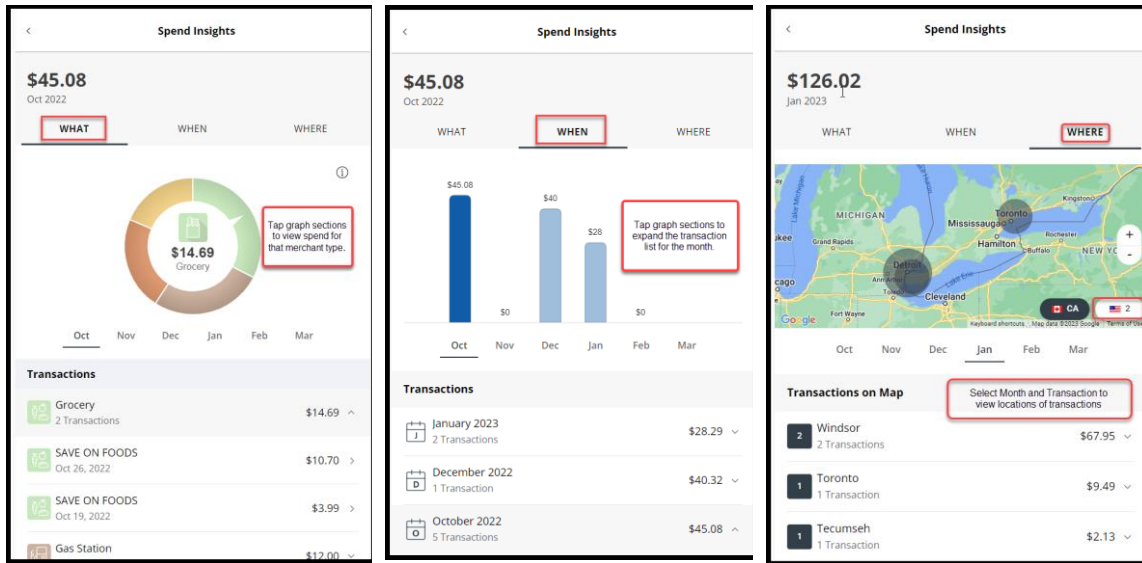
Where: Displays locations where the transactions were made.

To Access Spend Insights:

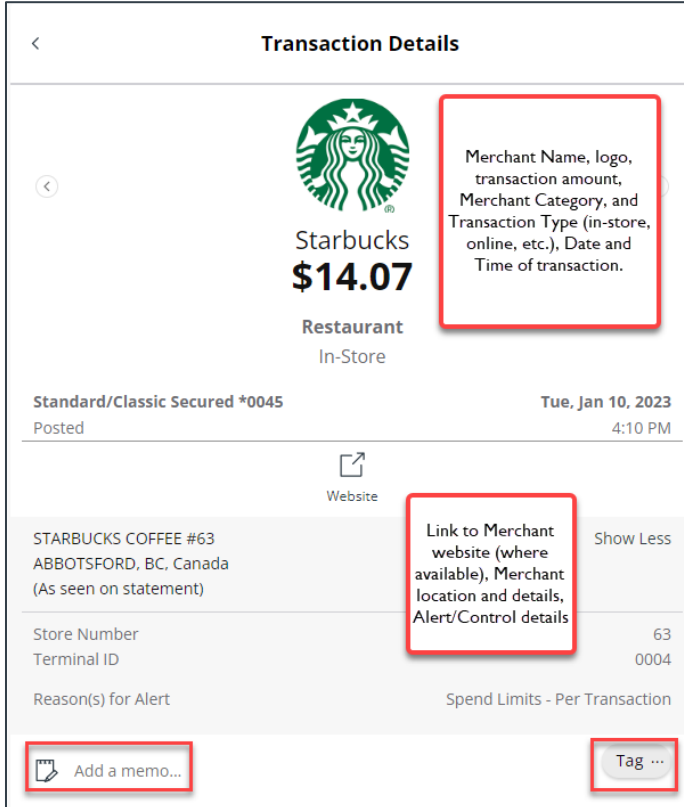
1. Under **Card Details**, select **Spend Insights**.



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.



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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