

BMO Spend Dynamics® transition checklist

For Corporate Card Program Administrators



BMO Spend Dynamics® is a user-centric, online card program management and reporting tool that provides intuitive navigation, increased flexibility, as well as control and visibility into your organization's corporate card spend.

To help you prepare for your transition, we've developed this useful checklist of four quick and simple action items:

1. Confirm the email address that BMO has on file for you.

You will find it in the BMO Spend Dynamics® notification you received, or in your BMO *details* Online® profile.

- If it is not accurate, please contact us immediately at 1-800-844-6445.
- If the email address is accurate, no action is required.

2. View an online demonstration of BMO Spend Dynamics.

- English: <https://bmo.adobeconnect.com/p1p183pyz68/>
- French: <https://bmo.adobeconnect.com/p3omxmf52d0/>

3. Schedule time in the month prior to your transition to review the online training modules.

Approximately 60 days ahead of your transition BMO will send the training links to the email address BMO has on file for you.

- The number of online training modules required will depend on your tool usage.
The average time required for a Program Administrator can range from 1.5 - 2 hours, which you can complete at your own pace.

4. Advise employees with access to BMO *details* Online about the upcoming BMO Spend Dynamics transition:

We recommend that all employees with access prepare as follows:

- View the online demonstration by visiting bmo.com/spenddynamics
- Schedule time in the month prior to the transition to review the online training modules.
The average training time required for a cardholder is 30 - 45 minutes, which they can complete at their own pace.



Let's connect

Have questions or require more information?

Please contact our Corporate Client Services Department at 1-800-844-6445.