



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: bmo.adobeconnect.com/spenddynamicsonlinedemonstration
 - French: bmo.adobeconnect.com/demonstration-en-ligne-opti-depenses
- 3. Advise key stakeholders of the transition to BMO Spend Dynamics and the timeline for transition.**
 An Implementation Specialist will schedule a time to discuss the scope and details of your card program set-up, and will contact you to do so a few weeks prior to the start of your transition period. We recommend that this discussion include representatives from Finance, Procurement and other internal departments so all policies, processes and business rules pertaining to your corporate card program can be reviewed.
- 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/spenddynamics2
- 5. Register for a live system overview (1.5 hr) with a BMO Spend Dynamics expert.**
 Registration links will be provided to you approximately 60 days before the start of your transition period.

Let's connect

Have questions or require more information?

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