

Add and Remove a Card From a Wallet

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Adding and removing cards

1.

Multiple cards can be used for a single wallet. This is an advantage when you want flexibility in which cards can access funds.

For example;

You could have 3 participants in a house with their own cards and one house card. You could connect the house card to all of their wallets so that if one of their cards are lost, house staff can quickly use the house card for their purchases while waiting for a new card to be ordered.

If you have questions about this please do not hesitate to contact your customer success manager.

The screenshot shows the Budget Hub dashboard for a user named 'Reece Miller (Super Admin)'. The sidebar on the left has the 'Cards' option highlighted with a red arrow. The main content area shows 'Top Wallets' with five wallets: 'Reece Miller 99' (Wallet Bal: \$0), 'Wallet 2 1958' (Wallet Bal: \$0), 'Groceries 1978' (Wallet Bal: \$0), 'Prod test 3 pt3' (Wallet Bal: \$998), and 'Prod test 2 pt2' (Wallet Bal: \$10). Below this is a 'Recent Transactions' table with columns for Merchant, Amount, Date / Time, User, Wallet, and Balance.

Merchant	Amount	Date / Time	User	Wallet	Balance
WW METRO/965 SMITH ST LVL-FITZROY AU	\$4.11	05/05/2024 04:37 PM	Reece Miller	Reece Miller	\$1295.16
TWO BOB CAFE-FITZROY NDEBT AU	\$61	05/05/2024 11:17 AM	Reece Miller	Reece Miller	\$1299.27
RESERVOR RSL-Reservor AU	\$16.2	04/05/2024 09:39 PM	Reece Miller	Reece Miller	\$1360.27
RESERVOR RSL-Reservor AU	\$19	04/05/2024 08:31 PM	Reece Miller	Reece Miller	\$1376.47
RESERVOR RSL-Reservor AU	\$18.4	04/05/2024 07:17 PM	Reece Miller	Reece Miller	\$1395.47

2.

Click 'Cards'

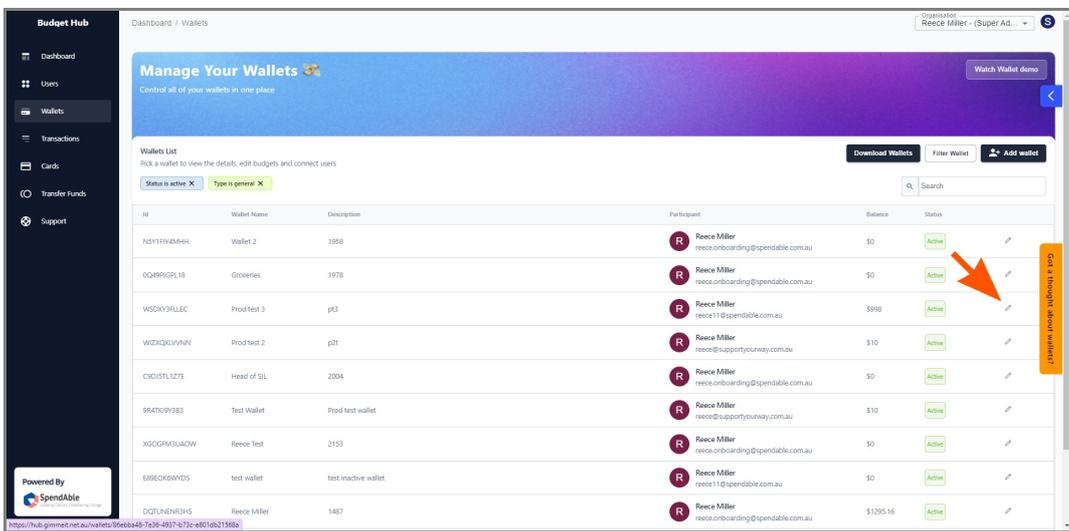
The screenshot shows the 'View Your Cards' page in Budget Hub. The sidebar has the 'Cards' option highlighted with a red arrow. The main content area has a 'Cards list' section with a search bar and a table of cards. The table has columns for ID, Card No., Order id, Status, User, and Access Type.

ID	Card No.	Order id	Status	User	Access Type
91153021-9a99-4b03-b000-6129480929f	swag: 1487- ****4348	CRNovatt_20230308481166	ACTIVE	Reece Miller reece11@spendable.com.au	SHARED
0706d69-4129-4b6a-9981-153c8c098a2	Reece Miller- ****4348	DummyCard	ACTIVE	reece11@supportyourway.com.au	PRIVATE
3489a98a-470c-4250-9aeb-2002b4fe4550	****0047	CRNovatt_20240107660589	ACTIVE	Reece Miller reece.onboarding@spendable.com.au	SHARED
6896c420-a504-4492-92b1-e67770a3d955	****1508	CRNovatt_20240107660588	ACTIVE	Reece Miller reece.onboarding@spendable.com.au	SHARED

3.

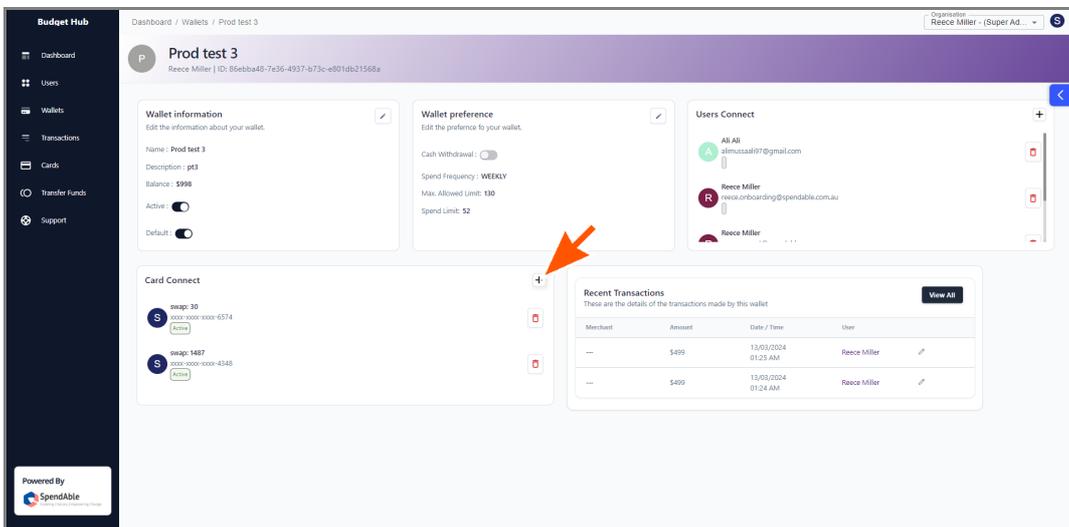
Observe the details of the card you want to connect to the wallet.

Remember the Card no and User.



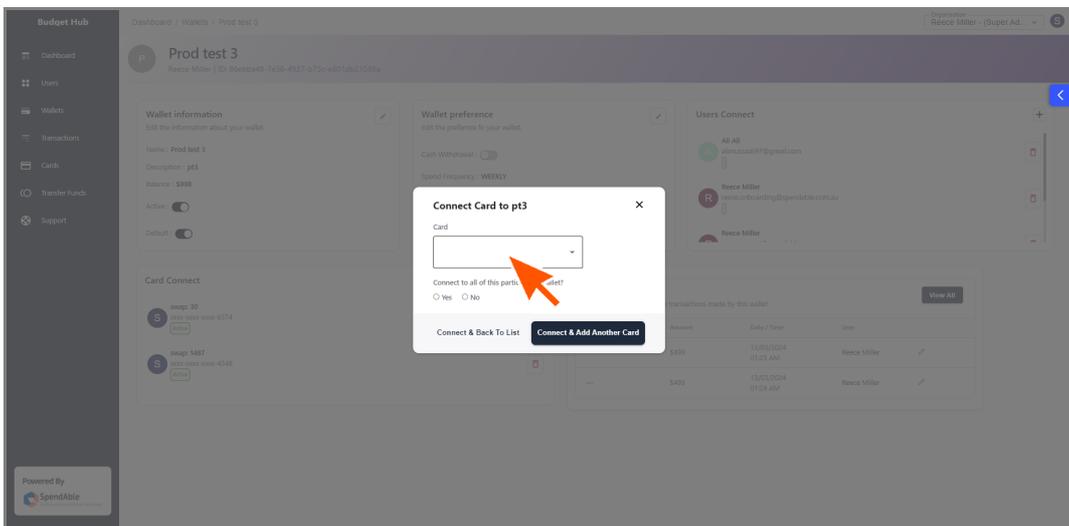
4.

Click the edit pencil for the wallet you want to connect the card to



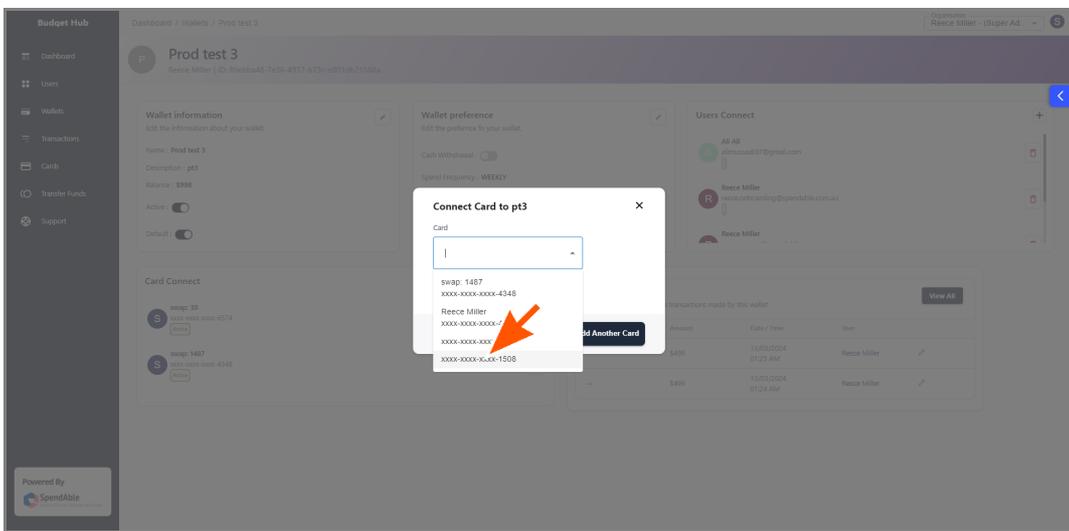
5.

Click the 'Add button' in the *Card Connect* section

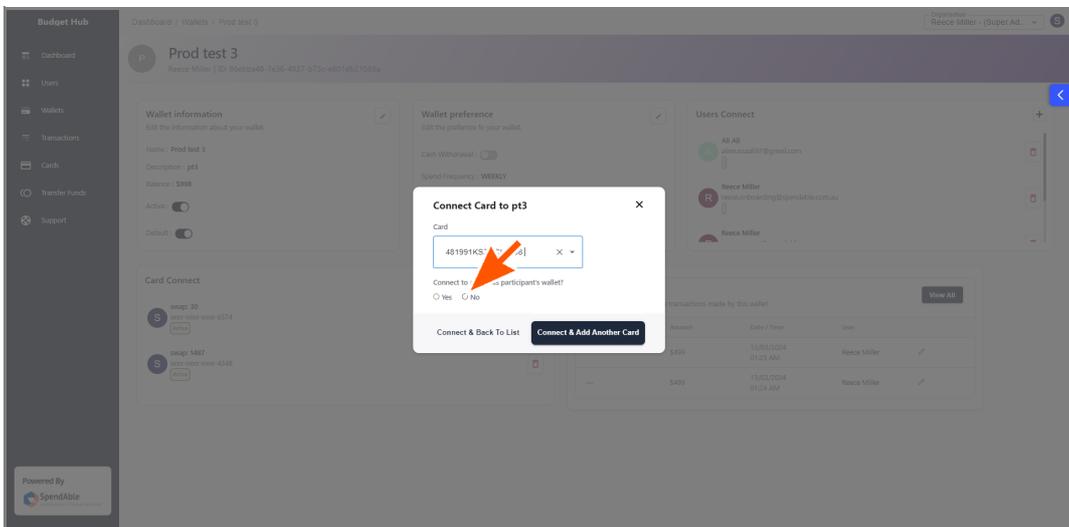


6.

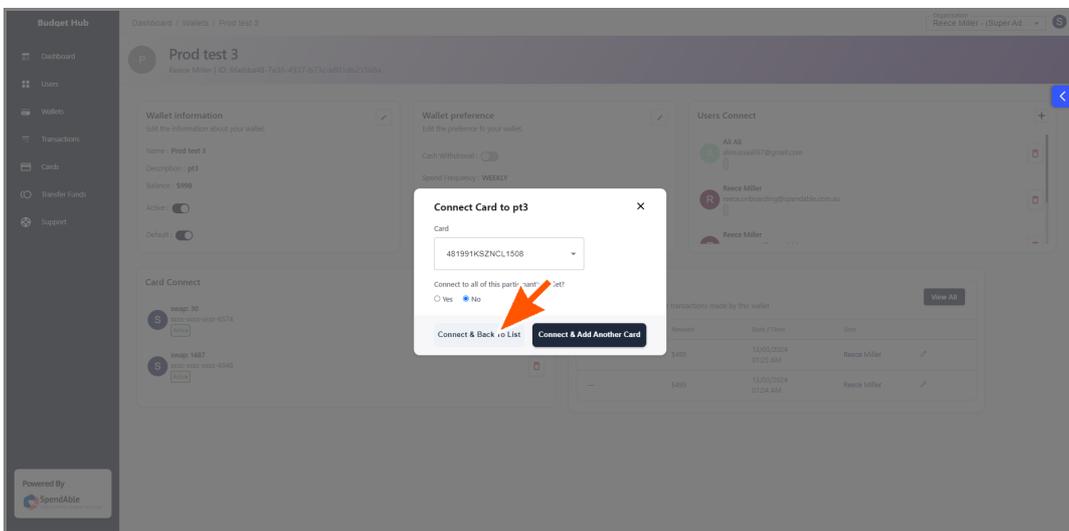
Open the card dropdown box



7.
Select the card you want from the list using the Name and Card No.



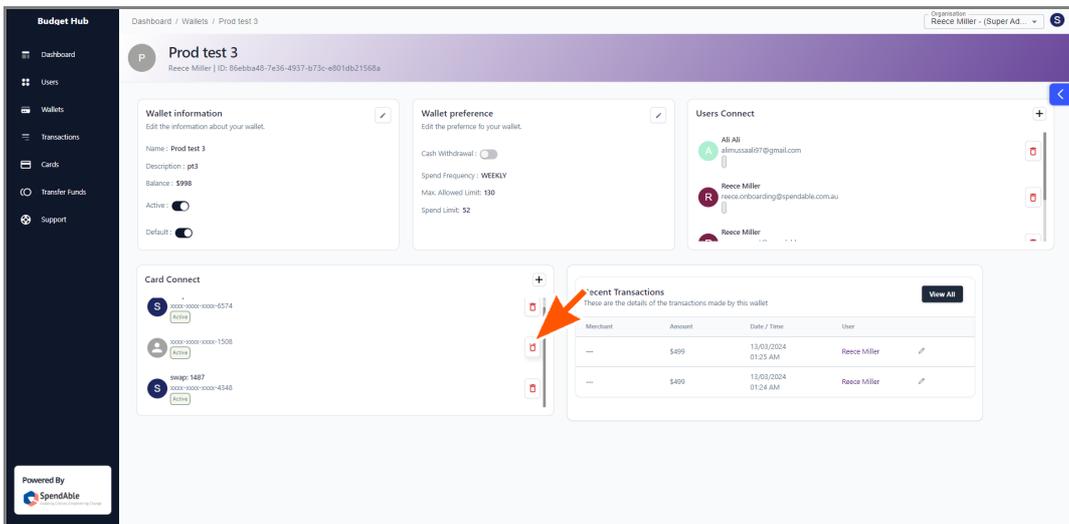
8.
If you only want to connect this card to this one wallet select - No
If you want to connect this card to all wallets of this participant select - Yes



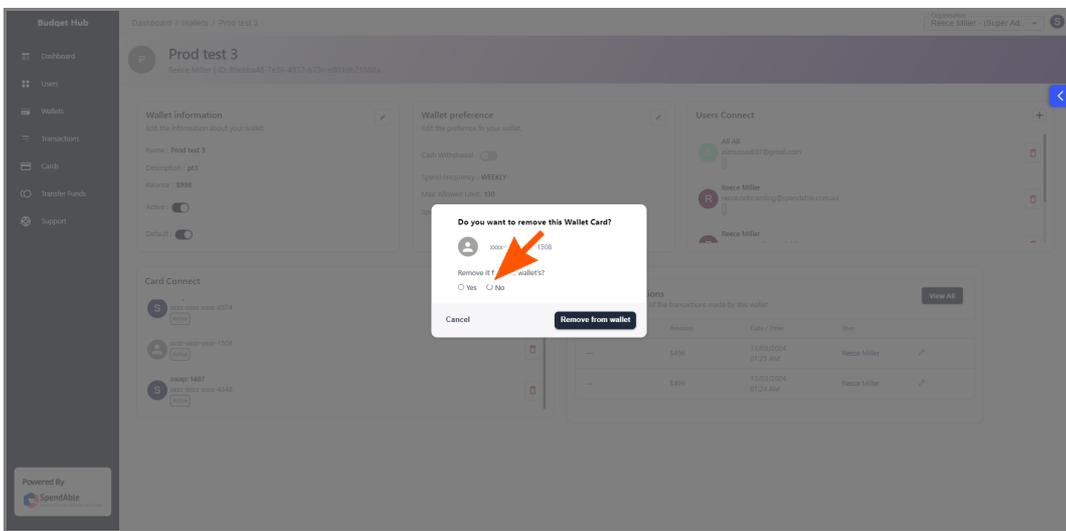
9. Click 'Connect and Back To List'

Remove a card

10. If you need to remove a card from the list because it is lost or not being used anymore it is fairly simple.



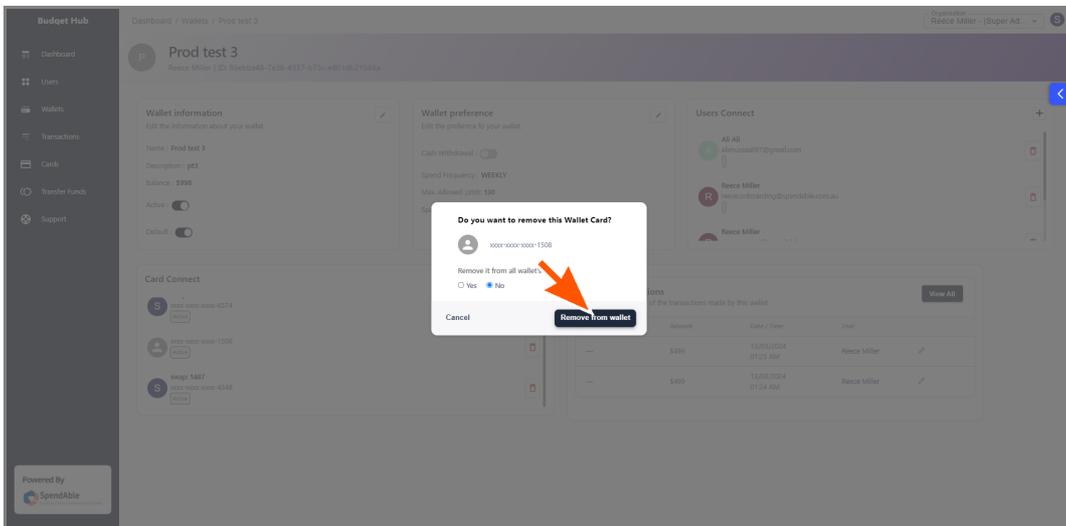
11. Click the Red delete button in the *Card Connect* section of the wallet



12.

If you only want to disconnect this card from this one wallet select - No

If you want to disconnect this card from all wallets select - Yes



13.

Click 'Remove From Wallet'