



# Barclaycard Spend Management

Reporting cardholder user guide



# Welcome to Barclaycard Spend Management

This guide will walk you through a few simple steps to help you get the most from the system.

Barclaycard Spend Management is a simple, intuitive online tool that helps you manage your Barclaycard account. It will help you keep track of your spending, including your credit limits, available balance, and gives you access to online statements.

This quick guide will take you through the basics of using the system, showing you how to keep complete control of your spending. Start using your card today and enjoy all the benefits of your online account.



You can navigate easily through this document by clicking on the tabs in the header of each page



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# Getting started: first time login

To log in to your Corporate online servicing accounts, you'll need your PINsentry card reader and your Barclaycard Corporate card or Authentication card.

- 1 Navigate to [barclaycard.co.uk/business](https://barclaycard.co.uk/business) and log in with the button in the top-right corner
- 2a You'll then see a **'Log into your account'** screen. Enter your username or email address and press **'Next'** to move on to the verification screen
- 2b If you don't have a username or haven't used online servicing before, press **'Not got your username?'**
- 2c On the next screen, enter your surname and the card number from your Barclaycard Corporate card or Authentication card. Then press **'Submit'**



## Log into your account

**i** You'll notice there's a different way to securely access your account. This is to help give you added protection when accessing your online account. If you're accessing the system for the first time, please use the username that we have provided to you.

### Your details

Email address/Username

2a

[Not got your username? Click here.](#)

Next

2b

## Don't have your username?

Enter your details below

Surname

Sample Surname

Card number

4564564564564564

Cancel

2c

Submit

# Getting started: first time login

- 3a** The next screen will appear with instructions to confirm it's you using your PINsentry card reader
- 3b** Start by entering the last four digits of your card into the box on the login screen
- 3c** Insert your Barclaycard Corporate card or Authentication card in the card slot, chip-end first. Then press **'Identify'**

Log in to your account

We need to make sure it's really you before you log in.

Please log in with your PINsentry card reader following these steps.

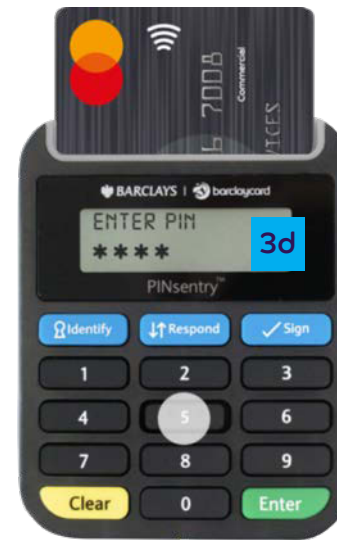
1. Enter the last 4 digits of your card  
 **3a**
2. Insert your card into the PINsentry card reader and press IDENTIFY
3. Type in your 4-digit card PIN and press ENTER
4. Enter the 8-digit code from your PINsentry card reader below  
  **3b**

Login



# Getting started: first time login

- 3d** Tap in your card's four-digit PIN and press **'Enter'**
- 3e** Your card reader will now show you an eight-digit code, which will only be valid for a few minutes, so enter it straight away
- 3f** Enter the eight-digit code in the box on the verification screen and press **'Submit'**



## Log in to your account

**i** You'll notice there's a different way to securely access your account. This is to help give you added protection when accessing your online account.

We need to make sure it's really you before you log in.

Please log in with your PINsentry card reader following these steps.

1. Enter the last 4 digits of your card
2. Insert your card into the PINsentry card reader and press IDENTIFY



4. Enter the 8-digit code from your PINsentry card reader below

1984 1976

**3f**

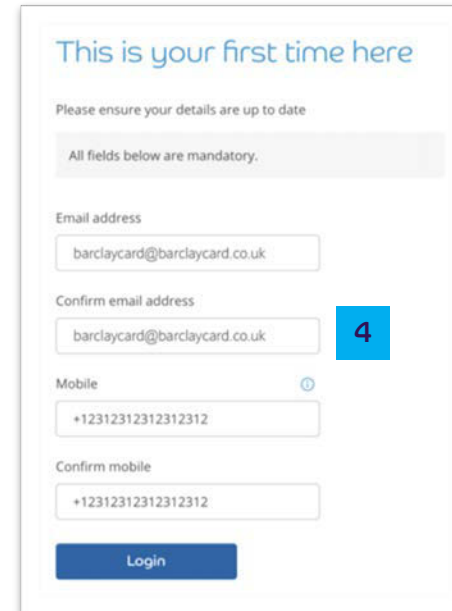
# Getting started: first time login

4

If this is the first time you've logged in, you'll also be asked to enter your email address and mobile. This will also allow you to use your email address to log in in the future

5

You're now logged in and you can choose the platform you'd like to visit by hitting **'Take me to my account'**



This is your first time here

Please ensure your details are up to date

All fields below are mandatory.

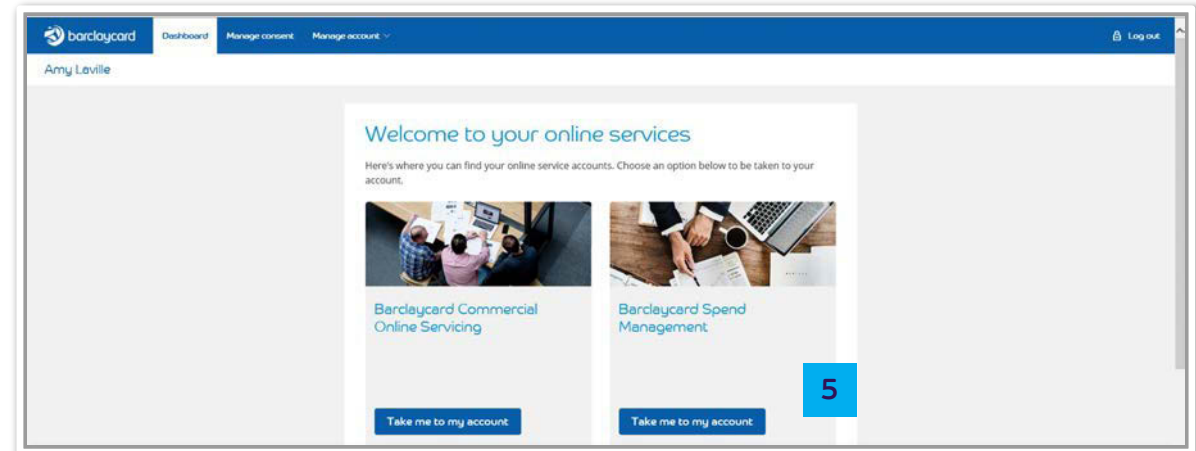
Email address

Confirm email address  
 4

Mobile

Confirm mobile

Login



barclaycard Dashboard Manage consent Manage account Log out

Amy Leville

Welcome to your online services

Here's where you can find your online service accounts. Choose an option below to be taken to your account.

Barclaycard Commercial Online Servicing  
Take me to my account

Barclaycard Spend Management  
Take me to my account

5

# Getting started: first time login

6

If you have more than one account on any of the platforms you have access to, you can choose the one you want using the dropdown menu. Select your chosen account and then press **'Take me to my account'** to access it

7

You'll now have access to service your account online. If you're having trouble logging into your account, please contact us on **0800 008 008** or **+44 (0) 1604 269 452** from abroad



## Barclaycard Commercial

XXXX-XXXX-XXXX - 1234

XXXX-XXXX-XXXX - 4321

XXXX-XXXX-XXXX - 4567

Please select



Take me to my account



## Barclaycard Spend Management

Choose account

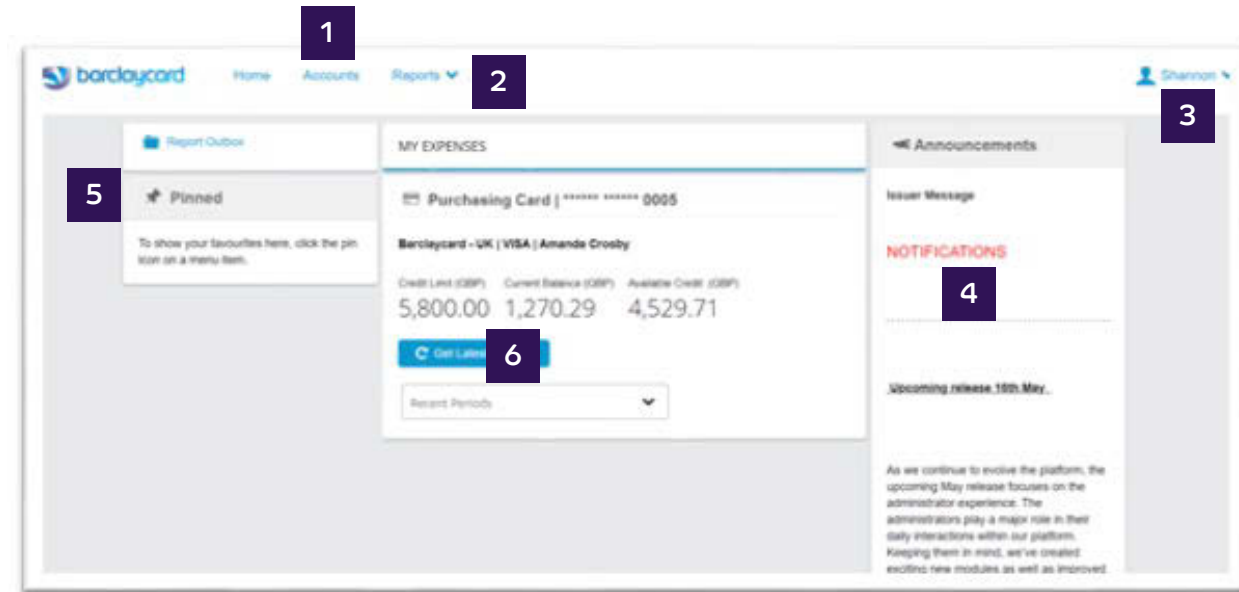
Please select

Take me to my account




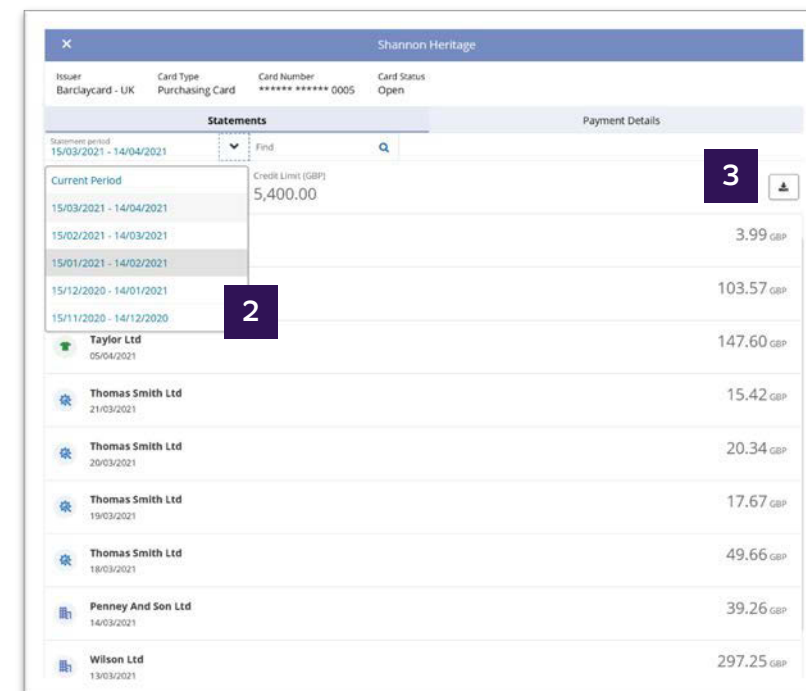
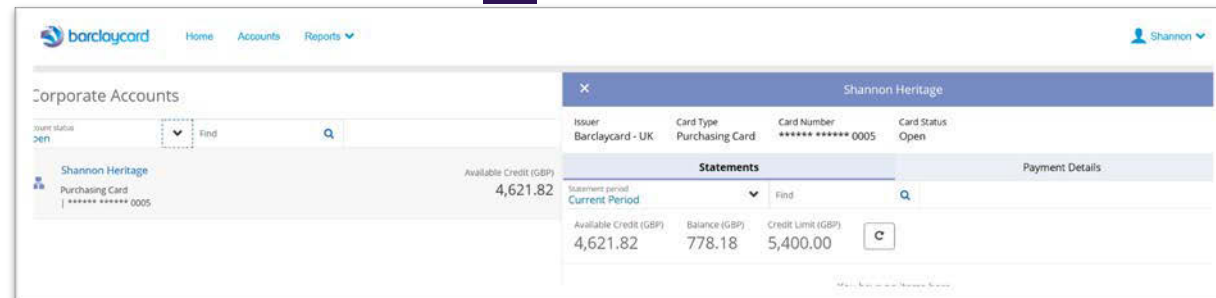
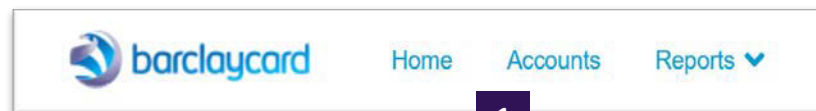
# Navigation: finding your way around

- 1 Accounts** – allows you to select the appropriate card account and search transactions / download statements
- 2 Reports** – access to a suite of reporting functionality that helps you to analyse your spend
- 3 Profile management menu** – a menu box where you can access a range of functions, such as altering the language settings
- 4 Issuer message** – information from Barclaycard about any changes to the system
- 5 Pinning function** – the menu lets you pin the items you use most often
- 6 Transactions** – displays key information such as credit limit, available balance



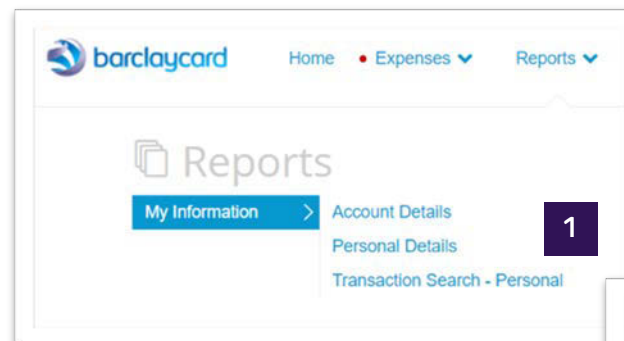
# Transactions: Viewing your spending

- 1 To view a summary of your recent transactions click **Accounts**. This screen will then display transactions for the current period
- 2 To select a statement period, choose from the drop down menu
- 3 To download a statement, click on the  icon



# Reports: running reports

- 1 Click on **'Reports'** from the main menu to see a list of the reports
- 2 Select the **'Transaction Search – Personal'** and enter the parameters as required in the new window
- 3 Once your options are selected, click **'Search'** to display your results



The screenshot shows the 'Transaction Search - Personal' search form. It includes several sections for filtering results:

- Statement Issuer:** Barclays, UK - Corporate (X)
- Statement Period:** 15/06/2019 to 14/09/2019
- Account Type:** [All Types]
- Start Date:** [Date field]
- End Date:** [Date field]
- Execution Range:** [Dropdown menu]
- Transaction Type & Status:** Includes Transaction Type, Transaction Status, Approval Status, and Policy Status.
- Receipt Status:** Radio buttons for Yes, No, Both.
- Personal Transactions:** Radio buttons for Yes, No, Both.
- Linked Transactions:** Radio buttons for Yes, No, Both.
- Disputed Transactions:** [Checkbox]
- Supplier Groups:** [Dropdown menu]
- Currency & Amount:** [Dropdown menu]
- Enhanced Data & Spend Wizard:** [Dropdown menu]
- Coding Information:** [Dropdown menu]
- Additional Fields:** [Dropdown menu]
- Report Templates:** [Dropdown menu]
- Export File Name:** [Text field]
- Export File Type:** [Dropdown menu]
- Exclude Payments:** [Checkbox]
- Search:** [Button]

A red box with the number '2' is placed over the 'Transaction Search - Personal' title, and another red box with the number '3' is placed over the 'Search' button.

The screenshot shows the transaction search results for 'Barclaycard - UK, 04/07/2019 to 02/10/2019'. The table is titled 'Mapped Cards' and 'Cardholder 2 Cardholder 2'. The table has the following columns: Posting Date, Tran Date, Supplier, and Amount. Each row represents a transaction and includes a red 'X' and a red arrow icon next to the amount.

Posting Date	Tran Date	Supplier	Amount
10/07/2019	07/07/2019	Eastern Trains	12.50
12/07/2019	09/07/2019	Snak-Atak	4.95
12/07/2019	09/07/2019	Luxair	501.36
12/07/2019	09/07/2019	Parentheses	1,249.22
20/07/2019	17/07/2019	Press Release Plc	32.00
22/07/2019	19/07/2019	Uscustoms Esta Appl Pmt	9.28
22/07/2019	19/07/2019	Www Flybe Co Abc789	9.99
22/07/2019	19/07/2019	Oscar Dining	55.30
31/07/2019	31/07/2019	Orange Grill	125.88
31/07/2019	31/07/2019	British Airw	159.37
01/08/2019	01/08/2019	Payment - Payment	-2,702.52

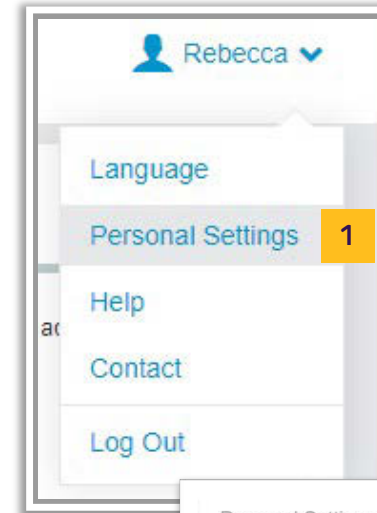
A red box with the number '3' is placed over the 'Mapped Cards' title.

# Customise your settings: personal settings

The 'Personal Settings' section allows you to customise certain aspects of Barclaycard Spend Management, such as the depth of information on your statements, language and time zone.


1

Click on the dropdown arrow on the right-hand side and click **'Personal Settings'**



Personal Settings

The following diagram map is aimed to help you configure and manage your own personal settings. If you have any questions or wish to change settings not available here then please contact your system administrator.



Charge Groups	Charge Codes
Report Groups	Reports
Approval Roles	Approval Rules
Rate Groups	

Personal Details	Mark O'Donnell - Personal Details		<a href="#">Edit ...</a>
Account Management	Employee ID	12345	
Management Codes	Username	MarkOD1	
Default Codes	Company Unit	Corporation 1	
Expense Templates	Phone Number	-	
Approval Delegation	Email Address	Mark.Odonnell@barclaycard.co.uk	
Customise Views	Date Added	19/04/2021	
Audit History	Date Modified	-	
Regional Settings	Date Departing	-	
Security	Receipt Upload via Email		<a href="#">More Info ...</a>
Email Management	mod.u.nph7.krr623@receipt-upload.com		
	Manager Details		
	No Manager		

# Help

This guide provides details on how to perform the key functions in the application. If you need further detail, the 'Help' function contains more information in a range of formats.

- 1 Choose **'Help'** from the main menu
- 2 You can search for topics or navigate using the key menu topics



If you still need further support, please contact our Technical Helpdesk who'll be happy to assist. You can call us on 0844 824 0231 from 9am 5pm Monday to Friday, or you can get in touch by email to [BCTechnicalHelpDesk@barclaycard.co.uk](mailto:BCTechnicalHelpDesk@barclaycard.co.uk)

The screenshot displays the Barclaycard Help interface. At the top right, a user profile for 'Rebecca' is visible with a dropdown menu containing 'Language', 'Personal Settings', 'Help' (highlighted with a yellow '1'), and 'Contact'. Below this, a 'Log Out' button is present. The main content area is titled 'Your home screen' and includes sections for 'Quick actions' and 'Main'. A left-hand navigation menu is visible, with 'Contents' highlighted (yellow '2') and 'Personal settings' also highlighted (yellow '2'). The 'Contents' menu lists various topics such as 'Your role as administrator', 'Card information security', 'Log in and out of solution', 'Forgotten password request', 'Login disclaimer message', 'Language settings', 'Your home screen', 'Navigation', 'Session time out', and 'Browser support'. The 'Main' section provides information about account types and panels.



# Thank you

This information is available in large print, Braille or audio format by calling **0844 822 2140**.

Calls to 0800 and 0844 numbers are free from UK landlines and personal mobiles, otherwise call charges may apply. Please check with your service provider. To maintain a quality service we may monitor or record phone calls.

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