



Better manage marketing spend with Float

What is Float?

Float is Canada's first smart corporate card and spend management solution that provides businesses with real-time control and visibility over company-wide spend. We provide businesses with an unlimited number of high-limit Visa corporate cards tethered to our spend management software.

What does Float's spend management software do?

- In-depth analysis of company spending with real-time data
- Empower employees to easily spend and request approvals for what they need with smart approval flows
- Eliminate tedious expense reports and other manual tasks like reconciliations with automatic receipt collection and matching
- Improve accuracy by minimizing human error and expense fraud
- Create a healthier company spend culture with greater productivity and communication



A Float Guide for Marketing Teams

If your marketing team is constantly asking for the corporate credit card, don't worry – you're not alone! With Float, you no longer have to use a single card for all of your business purchases. Your finance team can instantly issue an unlimited number of physical and virtual VISA cards specifically to your marketing team — including managers, employees, and even interns!

Float gives marketing teams flexibility to spend while providing the finance team with oversight and control. It's a win-win.

How Float drives marketing teams forward

Marketing is typically one of the biggest spenders in an organization — regardless of the industry you're in. In the age of digital advertising, the list of expenses is always growing and can be even more complicated to manage without the right tools in place. These day-to-day expenses can include:

- 💰 Funding social campaigns
- ✈️ Travelling to conferences
- 💻 Purchasing software subscriptions
- ➕ So much more!



Easily request cards for marketing spend

Your marketing team needs to be able to make strategic decisions fast, without any bottlenecks. Our Teams and Expense Policy features enable Finance Admins to give marketing team leaders the authority to set spending limits on cards and quickly approve spend requests from their staff.

You can log into Float at any time and easily request a single use virtual card for purchases like swag orders, props for shoots or photography equipment. For advertising and software subscriptions, you can request a recurring virtual card. Virtual cards are issued instantly and accepted everywhere VISA and Mastercard are - all you have to do is simply copy and paste the card details into the vendor's billing details page.

Request Spending

Card Information

Card name

Is this a recurring expense?
 Single use Recurring

Currency: Limit: per Renewal

Description / Notes

Team

Accounting Settings

GL Code [ⓘ]

Additional Tags [ⓘ]

Approval Process

- Create Spend Request
- Receive Approval Auto-Approval
Amrita Gurney
Head of Marketing
- Receive Approval
Jennifer McNamee
Finance Manager
- Card Created
You will get notified once the card is created



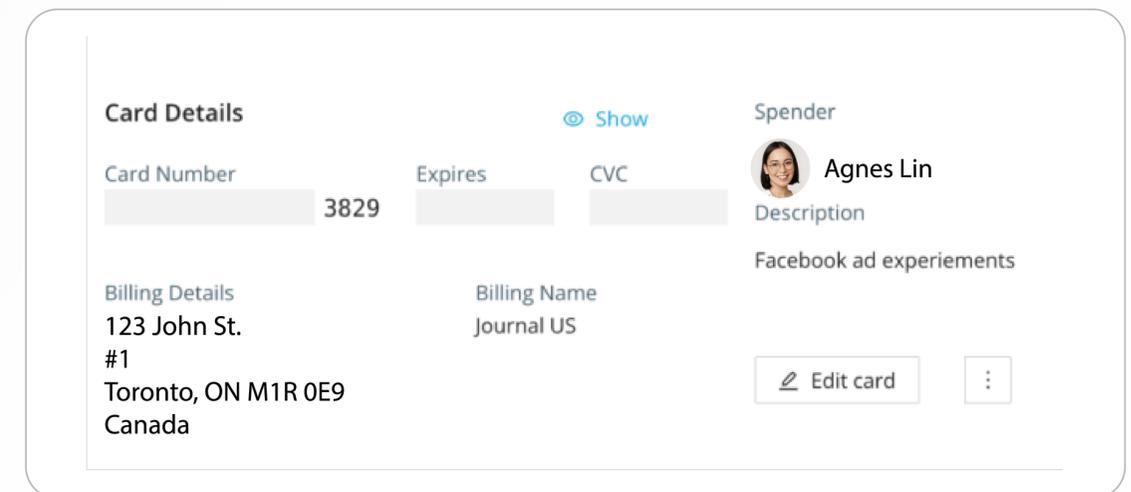
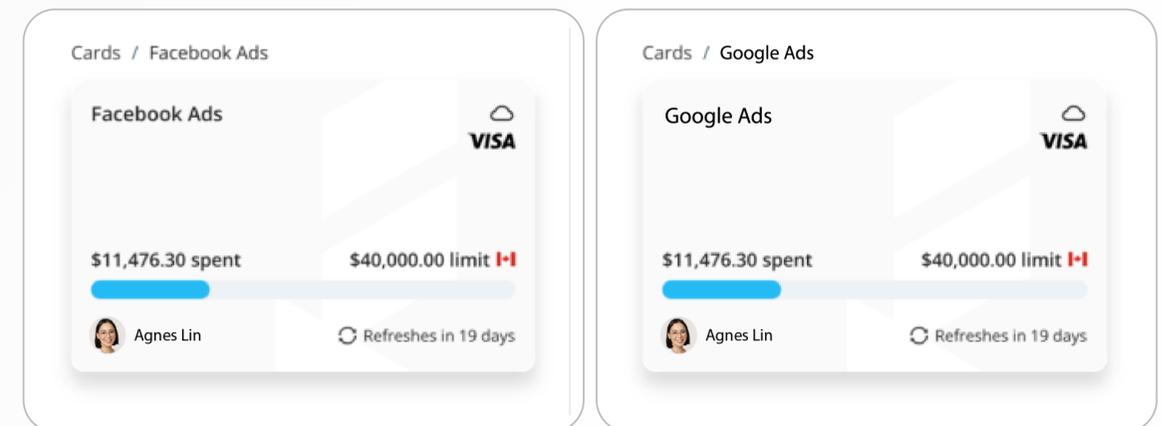
Instantly create a virtual card **by vendor**



Create a virtual card by vendor to easily categorize the types of recurring online spend your marketing team is making. A virtual card for every vendor gives you the option to create daily, weekly or even monthly recurring cards with assigned budgets. For example, if you know that your Facebook ad spend is \$40K/month, you can create a recurring monthly card with that limit.

A virtual card by vendor allows you to:

- 👛 Set monthly budgets for specific marketing activities
- 👁️ Easily track and control spending over the month
- ✅ Set limits to every card to ensure spend isn't exceeded
- 👋 Ensure vendors don't overcharge the card without your authorization
- 📄 Avoid disrupting other subscriptions or payments when you pause or cancel a card





Use physical cards for real world expenses

The finance team can issue a physical card to each marketing team member who has on-the-go expenses for travel, conferences, or client meetings. Float offers unlimited physical cards to Profesional plan members, and with the ability to set card limits and apply automated expense policies, there's no reason to hold out.

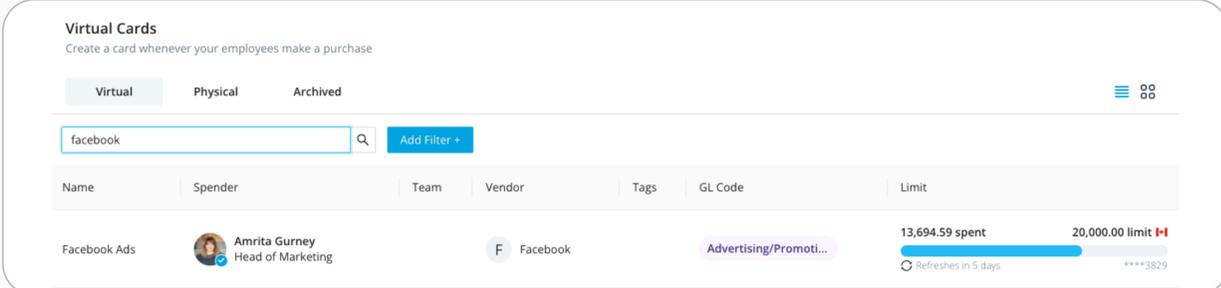
Cardholders are automatically reminded to easily send Float receipts and assign pre-defined GL codes as soon as the purchase is made, eliminating month end expense reports and reconciliations.





Track spending in real time without any guesswork

Marketing leaders can log into Float and monitor their team's spending in real time. Expenses like Google ads, travel costs and even miscellaneous expenses like morning coffee and lunch are all visible and categorized by vendors too. Gone are the days of asking for budget updates over Slack and tracking spend through a spreadsheet. Float makes everything available for you right on the dashboard. No guesswork, no errors, and no stress!



Virtual Cards
Create a card whenever your employees make a purchase

Virtual Physical Archived

facebook Add Filter +

Name	Spender	Team	Vendor	Tags	GL Code	Limit
Facebook Ads	 Amrita Gurney Head of Marketing		F Facebook	Advertising/Promoti...		13,694.59 spent 20,000.00 limit  <small>Refreshes in 5 days ****3829</small>

As for the finance team, Float grants them full visibility over what every department is spending, what they're purchasing, and whether their budgets need to be increased or scaled back.



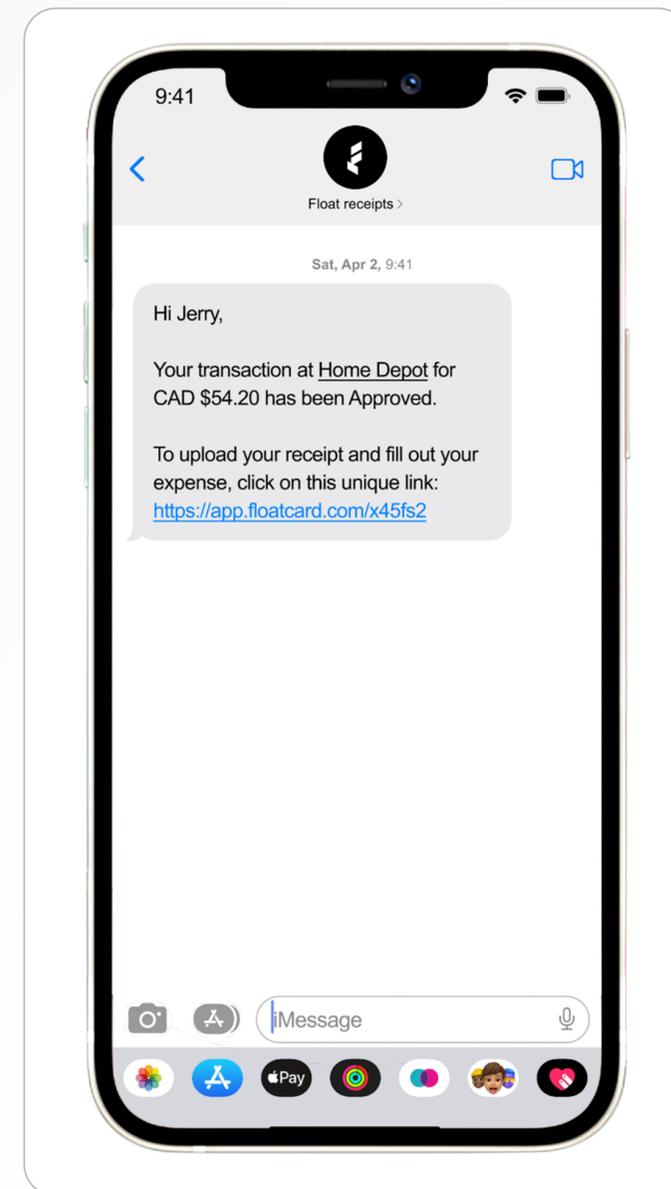
Collect and manage receipts in a flash

With so many transactions being made, marketing teams typically generate a ton of receipts. Float makes it easy to stay on top of those receipts through our SMS receipt upload and email receipt feature.

Spenders can:

-  Simply snap a picture of their receipt and submit it via text or email
-  Instantly upload it into the platform or forward the invoice directly to Float
-  Be reminded by their managers if a receipt is not submitted within a specific timeframe

Float even provides the option to tag expenses by vendor or category and add additional notes to every receipt submission so that managers know exactly what every purchase is for.



Ready to
get started?
Login to Float
or book a demo
with us today!

[Learn more](#)

