



A smarter way to manage recurring expenses

What is Float?

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

What does Float's spend management software do?

- Provides instant access to corporate cards accepted everywhere VISA and Mastercard are
- Allows for unlimited virtual cards to be created for each vendor for greater financial control
- Empowers employees to easily spend and request approvals for what they need with smart approval flows
- Stops receipt chasing and back-and-forth with the finance team
- Creates a healthier company spend culture with greater productivity and communication



A step-by-step guide to getting set up in Float

It can be a little overwhelming to use a new platform. But lucky for you – Float makes things easy breezy! Follow our step-by-step guide so you can start requesting (or approving) spend on Float.

- 1 Fill out the company spend checklist (pg. 4)**
- 2 Set up virtual cards by vendor (pg. 5)**
- 3 Change billing details (pg. 6)**
- 4 Review transactions in real time (pg. 8)**



Moving Your Company Spend Over to Float

Float is introducing a new way to manage expenses with virtual cards set up for every vendor in both CAD and USD.

What is a Virtual Card?

Virtual cards act in the same way as a normal credit card, except they don't have a physical counterpart. With a virtual card, you receive your card number right away, allowing you to use it instantly. They are great for making online purchases and can be used anywhere that accepts VISA and Mastercard.

Float offers greater financial control and visibility into company and team spending by giving you the ability to issue an unlimited number of virtual cards in both CAD and USD. We enable finance teams and managers to do the following:

-  Assign daily, weekly, monthly and yearly card limits
-  Instantly pause or cancel cards
-  Request and approve card top-ups
-  Automatically capture receipts and match them to transactions
-  Track spending in real time

For software subscriptions, digital advertising, or recurring operating expenses, setting up a card for vendors can:

-  Limit fraud as you don't have to rely on one card for multiple transactions
-  Ensure campaigns are not paused or shut down if card is cancelled or compromised
-  Allow for increased control while enabling teams to spend easier
-  Eliminate foreign transaction fees on USD software



Fill out the company spend checklist

Here's how you can increase oversight and control over company spending, while allowing Float's spend software to do all the work.

Step 1: Fill out the company spend checklist 📝

Identify the team or individual who will be the cardholder for each vendor. We recommend that the dedicated employee responsible for the vendor be the primary cardholder. This will allow them to keep track of usage and better budget costs over time. Float admins, however, will always have access and oversight into all company spending.

Share this Company Spend Checklist with your department leads and have them assign a cardholder and budget amount for each subscription, platform or vendor.

[Company Spend
Checklist](#)



Create a virtual card for each vendor

Step 2: Set up virtual cards by vendor 🇺🇸

Log into Float and instantly create a virtual card for each of your vendors. Simply go to “Cards”, then click “Create Card” and assign the cardholder, card limit, currency, and submission policy details based on the information your team provided. Spenders and managers can also request to create cards at any time for new subscriptions or recurring spend.

The screenshot shows the 'Create Card' interface in the Float application. The breadcrumb trail at the top reads 'Cards / Create Card / Virtual'. The main section is titled 'Card Information' and contains the following fields:

- Will this card be used just once, or should it have a recurring limit?** with radio buttons for 'Single use' and 'Recurring' (selected).
- Limit:** A dropdown for currency set to 'CAD', a text input for '\$ 1,000', and a dropdown for frequency set to 'Month'.
- Card Owner:** A dropdown menu showing 'Ashley Smith - Spender'.
- Team:** A dropdown menu showing 'Marketing'.
- What do you want to name this card?:** A text input field containing 'Facebook Ad Spend'.
- Description:** A text area containing 'Monthly ad budget for Facebook marketing.'

Pro tip: check the currency of the vendor before creating your Float card. Large merchants support multiple currencies (often determined by business, billing, or IP address), while others may default to USD.



Change billing details

Step 3: Change billing details 🧑

Your cardholder will be notified when the card is created and ready to use. From there, they can begin logging into the company's online accounts and review and change the virtual card details.

On the card details page, you can copy and paste the card number, expiry date, and CVC directly into your vendor's billing details page. Spenders can use the cardholder name as the billing name and the company address as the billing address.

Cards / Customer Support Onboarding Card

Customer Support Onboarding Card Virtual

0.00 spent | 1,500.00 limit 🇨🇦

MA Mauricio Ruiz Rivas | Card is inactive

Card Details [Show](#)

Card Number: [redacted] 2040 | Expires: [redacted] | CVC: [redacted]

Billing Details | Billing Name: Journal US

151 Charles Street West suite #199, Kitchener, N2G 1H6, ON, Canada



Common vendor billing changes

Easily change your company billing details to Float cards. Click the links below to be directed to the billing pages for the most common vendors on Float. Avoid foreign transaction fees by matching Float's card currency to the billing currency of the merchant (many software subscriptions charge in USD).

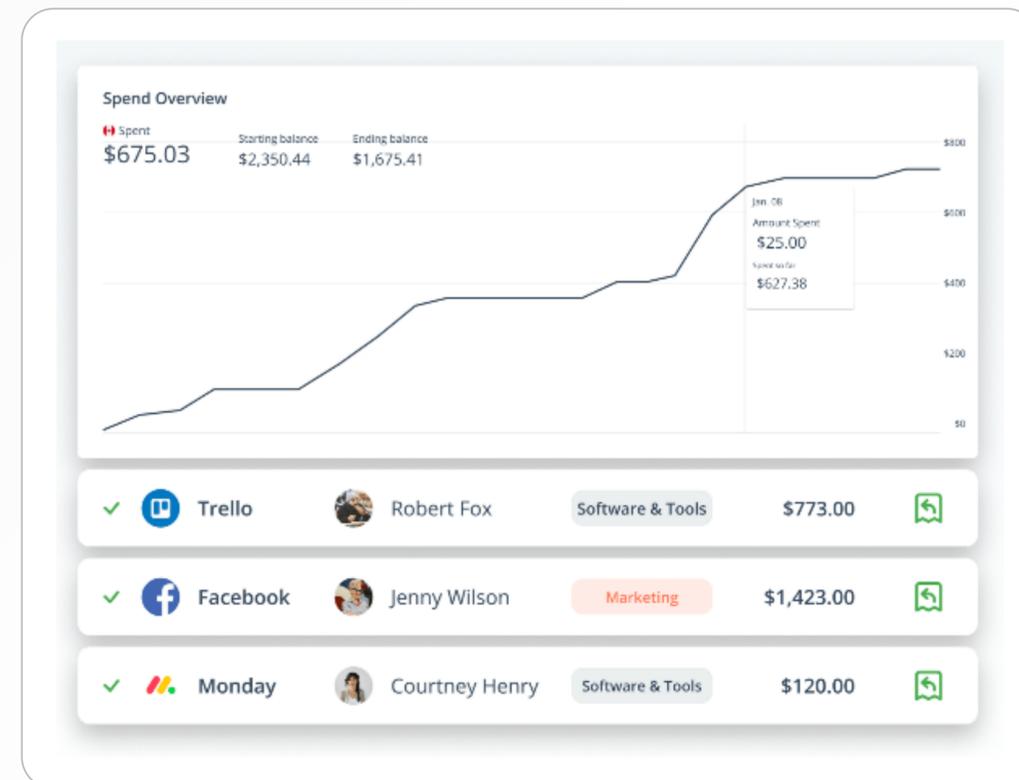
	Update Billing Here		Update Billing Here
	Update Billing Here		Update Billing Here
	Update Billing Here		Update Billing Here
	Update Billing Here		Update Billing Here
	Update Billing Here		Update Billing Here



Review transactions in real time

Step 4: Review transactions in real time 🏆

With Float, you can review transactions as they happen and track spending by team, vendor, or individual to identify big-ticket spends or questionable charges. Float admins can log into Float at their own convenience and review all of their company spending in real time. To get a full picture of company spending, go to the “Overview” page and then “Transactions” to filter by vendor, spender, or GL code. You can also view each card individually with the respective transactions.





That's it!

Moving your company spend over to Float is the smartest way you can increase oversight and control over team spending while automating tedious admin tasks. Need help transitioning your spend over to Float? Reach out to [our team](#) - we're here to help simplify your business spend.

Ready to get started? [Log in to start creating your Float cards today.](#)

[Create Float Cards](#)