

All actions are clickable and redirect to a resource article in the knowledge base

User options

- ☐ Load your users
- ☐ Assign roles
- ☐ Invite users
- ☐ Train users

Travel Settings

- ☐ Submit Travel Settings from
- ☐ Add Payment Methods

Spend Settings

- ☐ Connect Your Finance System (Xero, Sage Accounting Online, Quickbooks)
- ☐ Or Manual Accounting Set-up
- ☐ Create Segments
- ☐ Map Expense Types
- ☐ Set Mileage Reimbursement Rate
- ☐ Tax Settings
- ☐ Connect Your Card Feed
- ☐ Set your spend policy
- ☐ Test Your Internal Process End-To-End
- ☐ Authorise Users to Create Cash Expense

Purchase

- ☐ Create Punchout group in Amazon Business
- ☐ Connect Amazon Business

AMEX GBT
Neo1

**ONBOARDING
CHECKLIST**

UK Customers