

## Learn About Online Access

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# Business Credit Card Online Access

## Registration and User Guide

Use this guide to familiarize yourself with key functions for administrators and cardholders.

**TIP:** Some features to help navigate this guide work best on a desktop computer.

**START >**

**Log on to Credit Card Online Access >**

**BMO** 

# Introduction

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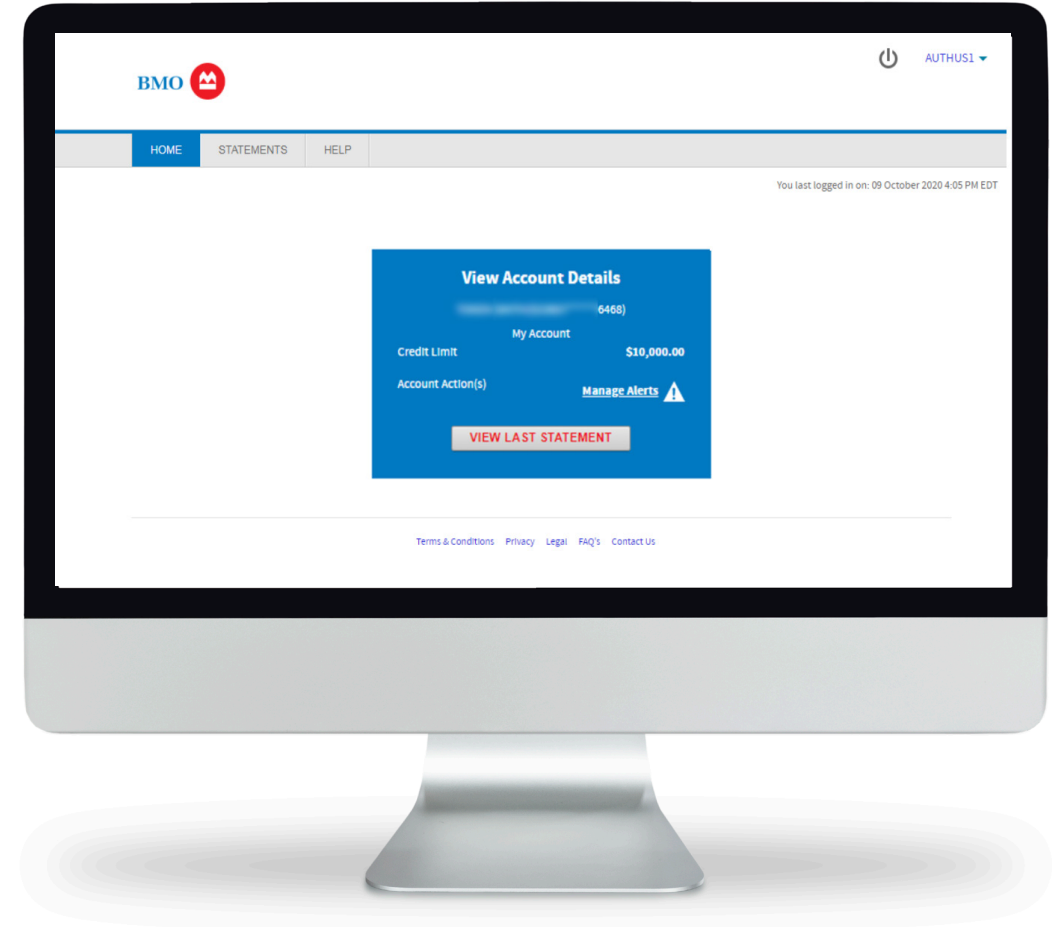
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## Welcome

**Credit Card Online Access is the go-to platform for managing your BMO Business Credit Card.**

This Quick Start Guide can help you make the most of your online access benefits — with tips to guide you through key functions that simplify expense management and improve productivity.

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Let's begin by setting up your Online Access:

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# Set-Up Access

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**To use Credit Card Online Access, you must have a User ID and Password. If you don't, you can register easily by following these simple steps:**

## STEP 1

[Visit Credit Card Online Access](#)

Then click "Not Registered?" to display the Provide Account Number screen. To self-register, you will need to provide the 16-digit number on your physical card or the 16-digit number of your company account.

### TIP

You can also contact your company administrator or call the phone number on the back of your card to get set up.

**BMO**

### Enter credentials

**User ID** ([Forgot your User ID?](#))

**Password** ([Forgot your password?](#))

**Language**

English (United States) ▼

**LOG ON**

**Additional Information**

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## STEP 2: Enter your 16-digit number, then click "NEXT" to continue your registration.

What account number should be used to register?

**Cardholder:** If you want to manage only your card, including making payments, then enter the 16-digit number printed on your card.

**Business Owner or Administrator:** Use the 16-digit company account number found on your billing statement or welcome letter, not the number printed on your credit card.

*Not sure if you are an Administrator?*

This access is required if you are billed by your company account number, not your card number. Administrators traditionally manage a company's card program performing tasks such as:

- Making payments
- Reviewing account activity
- Registering and maintaining cardholder(s) access

BMO

### Provide Account Number

Card Account Number

< STEP 2

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## STEP 3: Continue by creating your user ID and password.

**Email:** Enter your full email address (e.g., name@companyname.com). Email notifications will be sent to this address.

**Mobile Phone Number:** This information is optional.

**User ID and password:** Follow the on screen guidelines for acceptable characters and length. Enter choices that are easily remembered by you but not easily guessed by others.

**Password hint:** This hint can be a few words or short sentence that describes your password in case you ever need a reminder. Do not retype your password.

**TIP**

The information entered in these fields is for the online account profile only and will not be changed on the credit card account profile. For these changes, please call the number on the back of your card or on your statement.

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**BMO**

1 Create a user ID and password 2 Register Account 3 Additional Security Information

### Create a user ID and password

Your email address [?] **TIP** On-screen guidelines for any field marked with a ? symbol can be revealed by pointing your cursor at the ? symbol

Your Mobile Phone Number [?]

+1

First name Last name

Create a user ID [?]

Enter a password [?] Re-enter password

Your password hint [?]

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## STEP 4: Provide your registration information.

**Name:** Enter name exactly as it appears on your card.

**Credit Limit:** As displayed on your card mailer or most recent statement.


\*Note: If your limit was changed today, please use previous day limit.

**Zip Code:** For U.S. Zip codes, use the 5-digit billing zip code.

**Business Name:** Enter the business name exactly as it is on the cards. It will be either the legal name or the business name displayed on the card(s).

**Business Phone:** This number is listed in your business credit card profile.

### Cardholders



1 Create a user ID and password 2 Register Account 3 Addt

#### Register an existing account

**Card Account Number \***  
8729


**Cardholder Name \* [?]**

**Credit Limit \***

**Zip/Postal Code\* [?]**

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### Administrators



1 Create a user ID and password 2 Register Account 3 Addt

#### Register an organization administrator

**Account Number**  
1545

**Business Name \* [?]**

**Zip/Postal Code\* [?]**

**Business Phone**

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## STEP 5: Review and accept the cardholder statement delivery option.

**For Cardholders:** Online registration automatically enables electronic statements. All cardholders will have access to electronic statements. If the Statement Delivery Option is not displayed then paper statements are not generated on this account. Statements will be sent only electronically.

**For Administrators:** As an administrator you have the ability to register additional cardholders with their own log in credentials. As a reminder, you will need each of your cardholder's details in order to register their account.

The screenshot shows the BMO registration interface. At the top left is the BMO logo. A progress bar at the top indicates three steps: 1. Create a user ID and password (completed), 2. Register Account (current step), and 3. Additional Security Information. The main heading reads "Account has been registered". Below this is a yellow banner with the text: "Your login account has been created and account [redacted] 1492 has been registered". There are three input fields: "Your email address", "Your name", and "Your User ID". A summary box titled "You have registered the following accounts" shows "Statement Delivery Option" set to "Send electronically only" for account [redacted] 1492. A blue arrow labeled "Step 5" points to this summary box. A "Register another account" link is located below the summary box.

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## STEP 6: Set up your security questions.

### Once you have completed your answers:

- Click "Submit" to display the End-User License Agreement
- Read it and click "Agree" to enter your organization's Credit Card Online Access homepage

#### TIP

**For each set of 5 questions** choose one to answer, then enter and re-enter your answer.

You may be asked one of more of these questions in the future to verify your identity when logging on or re-setting your password.

BMO

1 Create a user ID and password 2 Register Account 3 Additional Security Information

### Setup Security Information

To help protect your logon account from fraudulent use, you need to set up personal security questions. You may be prompted in the future to answer two or more of these questions as part of the Self Unlock/Reset Password process to help verify your identity.

Select and answer one question from each of the five sets. Use only Uppercase or lower case letters (a-z, A-Z), numbers (0-9), and single spaces in your answers. Do not use punctuation or symbols.

[Help me with this task](#)

**Security Question #1**  
Select a Question

**Security Answer #1**

**Confirm Security Answer #1**

**Security Question #2**  
Select a Question

**Security Answer #2**

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**Account Activity allows access to account summary, transactions, authorizations and statements.**

## STEP 1

Log on to Credit Card Online Access

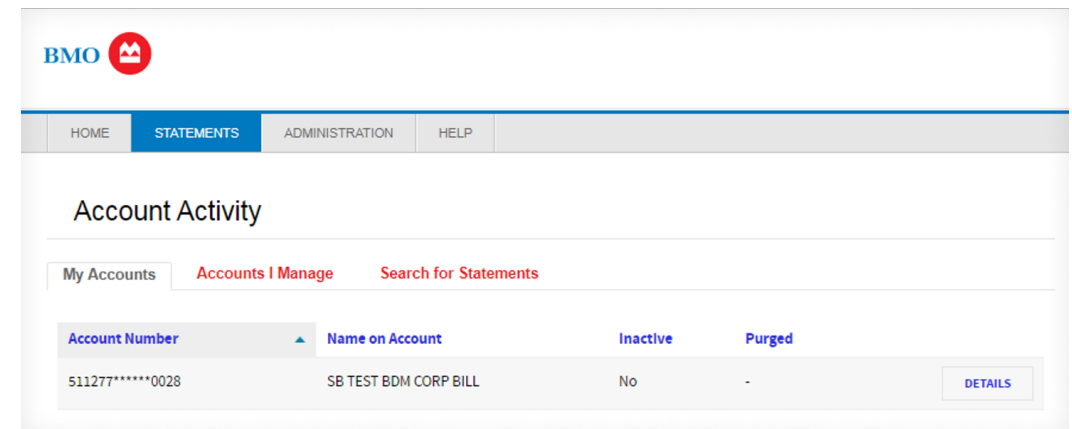
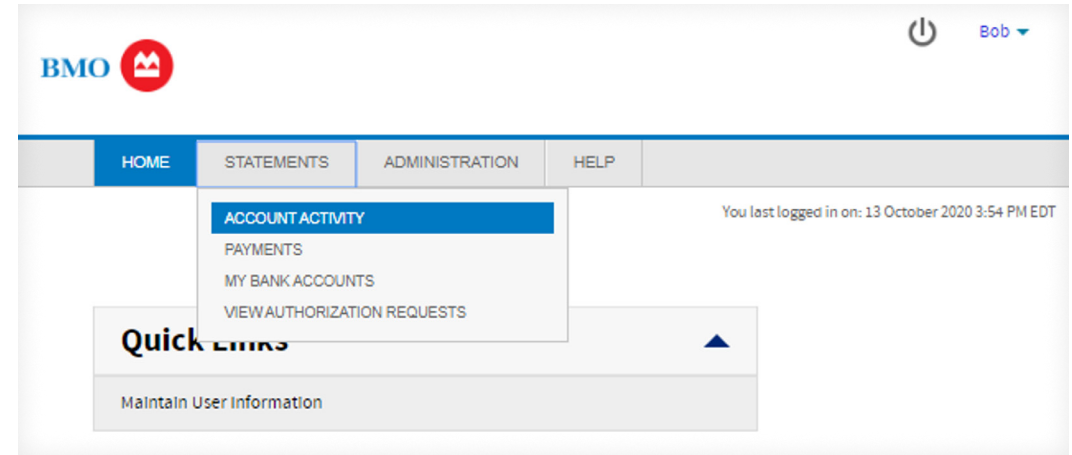
Then:

- From the HOME page, click on “STATEMENTS” to reveal the drop down menu
- Click on “ACCOUNT ACTIVITY” to reveal the account details screen
  - If you have access to one account, the Account Activity options will display
  - If you have access to more than one account, they will be displayed here, click “DETAILS” for the account you want to access

**Administrators:** You will see an interim Account Activity screen called “My Accounts.”

By clicking “DETAILS” on the company account, you will display all account and cardholder activity.

If you want to display a specific account that is not listed, select the “Accounts I Manage” tab to search.



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## STEP 2: Account Details shows your account Summary, Transactions, Authorization Requests or Statements.

### Summary:

- The Summary tab displays activity since the last statement plus a summary of the last statement

### Transactions:

- The Transactions tab provides a list of current or previous statement cycles (12 months) transactions. There is an option to download into several available formats

### Authorization Requests:

- The Authorization Requests tab provides details of approved transactions that may not be included in posted transactions

### Statements:

- The Statements tab includes access to up to 24 months previous statement cycles, access and download as a PDF

### Administrators:

- Account Details for the company account will include all cardholder(s)

The screenshot shows the BMO Account Details page for a company account. The page is titled "Account Details for [REDACTED] CORPORATION INC [REDACTED] 1844)". The navigation tabs are HOME, STATEMENTS (selected), ADMINISTRATION, and HELP. The page displays two tables: "Activity Since Last Statement" and "Summary of Last Statement (Statement Date: 9/26/2020)".

Activity Since Last Statement	
Current balance:	\$567.64
Current amount past due:	\$0.00
Available to spend:	\$36,432.36
Credit limit:	\$37,000.00

[HIDE DETAILS \[-\]](#)

Summary of Last Statement (Statement Date: 9/26/2020)	
Statement balance:	\$3,120.71
Past due amount:	\$0.00
Minimum payment due:	\$3,120.71
Payment due date:	9/29/2020

[HIDE DETAILS \[-\]](#)

Previous balance:	\$3,120.71
Payment received:	\$3,153.05
Purchases:	\$229.98
Cash advances:	\$400.00
Cash advance fees:	\$20.00
Other fees:	\$0.00

*The current balance amount includes last payment received and cash advances.*

Previous balance:	\$3,150.42
Payment received:	\$183.01
Purchases:	\$100.00
Cash advances:	\$0.00
Finance charges:	\$53.30
Cash advance fees:	\$0.00
Late payment fee:	\$0.00
Other fees:	\$0.00

If desired, payments can be initiated from this page

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Next, let's look at the Transactions tab:

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## Transactions

The Transactions tab provides a list of current or previous statement cycles (12 months) transactions. There is an option to download into several available formats.

Transaction details can include:

- Purchases/credits
- Payments
- Fees
- Any other adjustments

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The screenshot displays the BMO online banking interface. At the top, the BMO logo is visible. Below it, a navigation bar includes links for HOME, STATEMENTS (which is highlighted), ADMINISTRATION, and HELP. The main content area shows the account details for a corporation, with tabs for Summary, Transactions (selected), Authorization Requests, and Statements. Below the tabs, there are controls for selecting the statement cycle (Current) and download format (Select), along with DOWNLOAD and PRINT THIS PAGE buttons. A note indicates that up to 90 transactions display per page. The transaction list includes:

Transaction Description	Posted On	Transaction Date	Location	Originating Account Name	Originating Account Number	MCC	MCC Description	Amount
AUTOMATIC PYMT RECEIVED	9/29/2020	9/29/2020		CORPORATION INC	1844			(\$3,120.71)
BEST BUY	10/1/2020	9/30/2020	TORONTO ON 00000		6948	5045	COMPUTERS, COMPUTER PERIPHERAL EQUIPMENT, SOFTWARE	\$99.99
WALMART	9/30/2020	9/30/2020	TORONTO ON 00000		6948	5399	MISCELLANEOUS GENERAL MERCHANDISE STORES	\$129.99

Next, let's look at the Authorization Requests tab:

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## Authorization Requests

The Authorization Requests tab provides details of approved transactions that may not be included in posted transactions.

- Results can be searched by date and/or status

TIP

Current authorizations since your last statement may reduce the available credit on the account if not yet posted.

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Click on 'Details' to view additional transaction information



TIP >

Account Details for [REDACTED] 3880)

Summary Transactions **Authorization Requests** Statements

Approved

From  To

SEARCH

Search Results

Details	Date/Time	Status	Auth Code	Merchant	MCC	Amount	Type	Reason
...	11/3/2020 9:02 AM	Approved	05360C	KWIK TRIP #808	5541	\$6.36	Purchase	APPROVED

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Next, let's review how to Access Account Statements:

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**Cardholders can access statements for their individual accounts, and administrators can access statements for multiple accounts, by following these simple steps:**

## STEP 1

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Then:

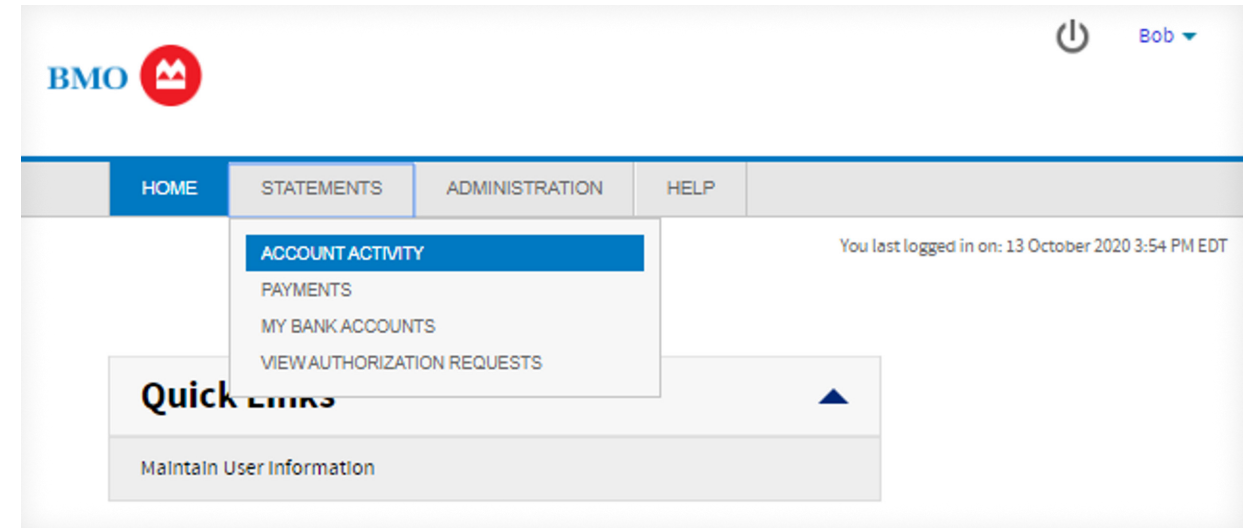
- From the HOME page, click on “STATEMENTS” to reveal the drop down menu
- Click on “ACCOUNT ACTIVITY” to reveal the account details screen.

**Cardholders:** The ‘Account Details’ screen is displayed, select the “**STATEMENTS**” tab

**Administrators:** The “Account Activity” screen is displayed with the options to:

- Review the company account statements: click “DETAILS”
- Search accounts under the “Accounts I Manage” tab for a **list of accounts**, then click “DETAILS” for the account you want to display
- Review a **specific account** statement using the “Search for Statements” tab. You will need the cardholder name or account number.

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## Statements

The Statements tab includes access to up to 24 months previous statement cycles, access and download as a PDF.

### STEP 2: Select the statement.

Click on a statement to download it in a PDF format

#### TIP

- Up to 24 months of past statements will be listed.
- The most recent statement will appear at the top of the list.

The screenshot shows the BMO online banking interface. At the top left is the BMO logo. Below it is a navigation bar with tabs for HOME, STATEMENTS (which is highlighted in blue), ADMINISTRATION, and HELP. Below the navigation bar is a breadcrumb trail: < Back to results. The main content area displays 'Account Details for [REDACTED] CORPORATION INC ([REDACTED] 1844)'. Below this, there are four tabs: Summary, Transactions, Authorization Requests, and Statements. The Statements tab is selected and highlighted with a blue box and a blue arrow pointing to it with the text 'STEP 2'. Below the tabs, there is a list of statements with two entries: 'Saturday, September 26, 2020' and 'Wednesday, August 26, 2020'. At the bottom of the page, there is a footer with the Adobe Acrobat Reader logo and a message: 'To view a statement, you must first have Adobe Acrobat Reader installed. You can download Acrobat Reader for free from Adobe's web site.' Below the footer are links for Terms & Conditions, Privacy, Legal, FAQ's, and Contact Us.

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Next, let's review how to search for statements for multiple accounts:

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**OPTIONAL STEP 3: If you have access to multiple accounts, choosing the “Search for Statements” tab will allow you to search for other account statements.**

- To download in a PDF format, simply click the PDF icon

**TIP**

The search option will default to view active accounts and inactive within the last 45 days.

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The screenshot shows the BMO Account Activity page. The 'STATEMENTS' tab is selected in the navigation bar. Below the navigation bar, there are tabs for 'Accounts I Manage' and 'Search for Statements'. The 'Search for Statements' tab is highlighted with a blue box and a blue arrow pointing to it with the word 'OPTIONAL' in a blue box. A callout box with an exclamation mark icon contains the text: 'The search for statements tab is optional and can be used to find statements if you have more than one account'. Below the tabs, there are search filters: 'Subunit number', 'Name on account', and 'Account number'. There are also checkboxes for 'View active accounts only', 'Inactive within 45 days', 'Inactive longer than 45 days', and 'Purged'. Date pickers for 'Start Date' and 'End Date' are shown. A 'SEARCH' button is located below the filters. Below the search button, there is a 'Search Results' section with a 'Download All' link. The search results are displayed in a table with columns: Account Number, Name on Account, Unit Name, Unit Number, Statement Date, Inactive, and Download. The table contains four rows of data.

Account Number	Name on Account	Unit Name	Unit Number	Statement Date	Inactive	Download
0127					No	
0420					No	
0453					No	
6161					No	

Next, let's look at how to Edit Personal Info or Password:

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**You can edit your personal information or change your password by following these simple steps:**

## STEP 1

Log on to Credit Card Online Access

Then:

- Click the arrow next to your User ID to reveal the drop down menu
- Click the desired option to either "Edit Personal Information" or "Edit Password"

The screenshot shows the BMO online banking interface. At the top left is the BMO logo. The user is logged in as 'Bob'. A dropdown menu is open, showing options for 'Edit Personal Information' and 'Edit Password'. A blue box highlights the 'STEP 1' instruction. The main navigation bar includes 'HOME', 'STATEMENTS', 'ACCOUNTS', 'ADMINISTRATION', and 'HELP'. Below the navigation bar, there is a 'View Account Details' section for 'SB TEST BDN IND BILL(511277\*\*\*\*\*0010)' with a credit limit of '\$1,000.00' and a 'VIEW LAST STATEMENT' button. To the right is a 'Quick Links' section with 'Manage Accounts' and 'Maintain User Information' options. At the bottom, there are links for 'Terms & Conditions', 'Privacy', 'Legal', and 'Contact Us'.

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## STEP 2: Make the desired edits, then click "SAVE".

### Personal info:

- Provide the email address to which you want notifications sent.
- The cc email address is optional; if desired, notifications can also be sent to a second email address.
- A mobile phone number is optional; to provide or edit this information, enter the mobile number and select the phone number country.

### Password:

- Passwords are case sensitive; to reveal the guidelines for creating an acceptable password, point your cursor at the ? symbol.
- The Password Hint can be a few words to help you remember your password if you ever need a reminder. **IMPORTANT:** The system will not allow you to embed your password in the password hint field.

#### TIP

The information entered in these fields is for the online account profile only and will not be changed on the credit card account profile. For these changes, please call the number on the back of your card or on your statement.

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The screenshot shows the 'Personal info' section of the BMO online account management system. The page title is 'Edit Personal Information'. A red asterisk indicates a required field. The form includes the following fields: 'User ID' (with a redacted value), 'First name: [?] \*', 'Last name: [?] \*', 'Email address: [?] \*', 'CC Email address: [?]', 'Email Language [?]' (set to 'English US'), and 'Mobile Phone: [?]' (with a country code dropdown set to '+1'). At the bottom, there are 'SAVE' and 'Cancel' buttons.

The screenshot shows the 'Password' section of the BMO online account management system. The page title is 'Edit Password'. The form includes the following fields: 'User ID' (with a redacted value), 'Current Password', 'New password: [?]', 'Confirm new password:', and 'Password hint: [?]' (with a redacted value). At the bottom, there are 'SAVE' and 'Cancel' buttons. At the very bottom of the page, there are links for 'Terms & Conditions', 'Privacy', 'Legal', and 'Contact Us'.

Next, let's look at how to access Manage Alerts:

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**You can use the Manage Alerts page to activate & enable, suspend or disenroll the available alerts by following these simple steps:**

## STEP 1

Log on to Credit Card Online Access

Then:

- From the HOME page click on "Manage Alerts"

The screenshot displays the BMO Credit Card Online Access interface. At the top left is the BMO logo. Below it is a navigation bar with 'HOME', 'STATEMENTS', and 'HELP' tabs. The main content area shows 'View Account Details' for a cardholder named SMITH (6468). The account type is 'My Account' with a credit limit of '\$10,000.00'. Under 'Account Action(s)', there is a 'Manage Alerts' button with a warning icon, which is highlighted by a blue callout box labeled 'STEP 1'. Below this is a 'VIEW LAST STATEMENT' button. The page also includes a login timestamp 'You last logged in on: 09 October 2020 4:18 PM ED' and a footer with links for 'Terms & Conditions', 'Privacy', 'Legal', 'FAQ's', and 'Contact Us'.

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### STEP 2: Enable or suspend alerts as desired.

- To ENABLE ALERTS: Confirm that “YES” is displayed in the slider window
- If “NO” is displayed, then, alerts are suspended. Click the left side of the slider to Enable Alerts

### STEP 3: Contact preferences will be displayed below the contacts tab. If none are displayed click the Add Contact button to specify:

- The email address(es) to receive email alerts
- The phone number(s) to receive text alerts\*

\* Message and data rates may apply. Contact your wireless carrier for details.

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DISENROLL

Language Bank Number Company number  
ENGLISH 7721

Enable Alerts  
YES **STEP 2**

Alerts are active. Switch to NO to suspend.

Contacts Alerts

ADD CONTACT **STEP 3**

	Type	Mobile Number	Email
⊖	✉		
⊖	💬		
⊖	💬		

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### To add Contacts for your Alerts, simply:

- Complete the fields as required
- Read and acknowledge the Terms & Conditions
- Click "SAVE" to update your preferences

#### Contact Types

- Click the boxes to specify your preferences.
- Alerts can be sent to any or all of the contacts you specify.

#### Email

- Provide the email address where alerts should be sent and a nickname to identify it (e.g., Work Email).

#### SMS (text)

- Provide the mobile number where text alerts should be sent and a nickname to identify it (e.g., My Work Cell Phone).

The image displays two overlapping screenshots of the 'Add Contact' form. The top-left screenshot shows the 'Email' section selected, with fields for 'Email Contact Nickname' and 'Email Address'. The bottom-right screenshot shows the 'SMS' section selected, with fields for 'Text Message Nickname', 'Mobile Number', and a 'Terms & Conditions' section with a scrollable text area and an 'I Agree to Terms & Conditions' checkbox.

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Now let's review how to select and activate alerts:

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# Manage Account (Manage Alerts, continued)

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**Manage Alerts**

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**After setting up your Contacts, select the “Alerts” tab to activate your preferred alerts.**

- Use the “Alerts” tab to review the available alerts and to individually activate or de-activate the alerts of your choice\*
- To activate any Alert(s), simply click the slider in the active column to Yes

\*Available alerts will vary depending on your account access

Active	Alert	Contacts	Description
<input type="checkbox"/>	<a href="#">Company Percent to Credit Limit</a>	<a href="#">0 selected</a>	Monitor Company Percent to Credit Limit
<input checked="" type="checkbox"/>	<a href="#">Missed Payment /Missed Payment</a>	<a href="#">2 selected</a>	Notify me when I have missed my payment
<input checked="" type="checkbox"/>	<a href="#">Payment Due in XX Days / Payment Due in XX Days</a>	<a href="#">2 selected</a>	Notify me a number of days before my payment is due
<input checked="" type="checkbox"/>	<a href="#">Personal Information Change /Personal Info Change -Name, DOB, SSN/Verify</a>	<a href="#">2 selected</a>	Notify me when my personal information changes
<input checked="" type="checkbox"/>	<a href="#">Specific Balance Amount /Balance Greater Than \$X</a>	<a href="#">2 selected</a>	Notify me when my balance exceeds amount

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Active	Alert	Contacts	Description
<input type="checkbox"/>	<a href="#">Multiple Percent to Credit Limit</a>	<a href="#">0 selected</a>	Monitor Balance as it reaches specified percents of my credit limit
<input checked="" type="checkbox"/>	<a href="#">Purchase Merchant State /Purchase Merchant State / Province</a>	<a href="#">1 selected</a>	Monitor Merchant State/Province Activity
<input checked="" type="checkbox"/>	<a href="#">Purchase Merchant Country /International Purchase Orchestrator</a>	<a href="#">1 selected</a>	Monitor Merchant Country Activity
<input type="checkbox"/>	<a href="#">Cash Purchase</a>	<a href="#">1 selected</a>	Monitor Cash Activity
<input checked="" type="checkbox"/>	<a href="#">Personal Information Change /Personal Info Change -Name, POB, SSN/Verify</a>	<a href="#">2 selected</a>	Notify me when my personal information changes
<input checked="" type="checkbox"/>	<a href="#">Internet Purchase /Ecommerce Purchase</a>	<a href="#">1 selected</a>	Monitor Internet Purchase Activity

Next, let's explore options for receiving statements:

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# Manage Account (Change Statement Delivery Option)

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[Manage Alerts](#)

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**The Statement Delivery Option specified during User Registration can be changed by following these simple steps:**

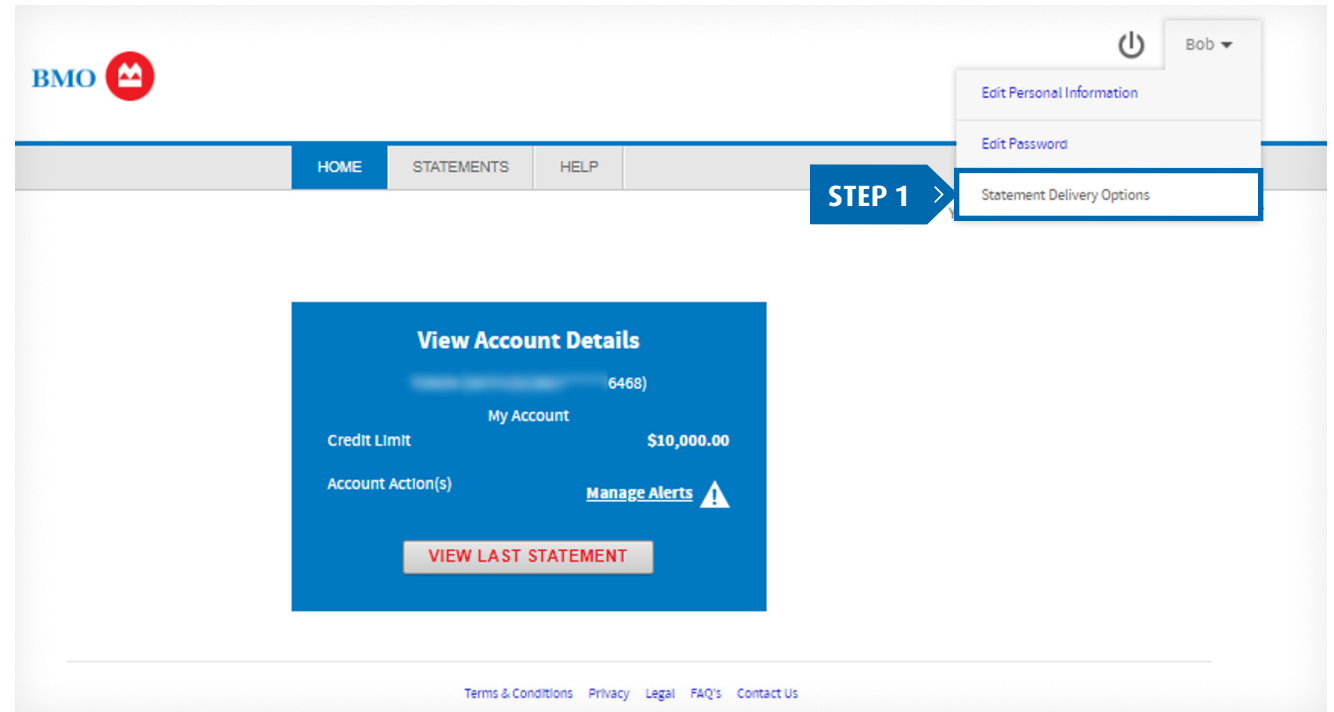
### STEP 1

Log on to Credit Card Online Access

Use the drop down menu adjacent to your User ID to select "Statement Delivery Options"

TIP

You can also contact your company administrator or call the phone number on the back of your card to get set up.



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# Manage Account (Change Statement Delivery Option, continued)

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Access Account Activity

Access Account Statements

Edit Personal Info or Password

Manage Alerts

Change Statement Delivery Option

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**STEP 2:** Click on the drop down menu to select your preferred delivery option.

**STEP 3:** Review the Consent section and the additional disclosure that appears below it.

Then scroll to the bottom of the page and click "SAVE".

TIP

You'll know that the statement delivery option was successfully changed by the option displayed.

Statement Delivery Option

Send by mail and electronically ▼

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### Manage Statement Options

Account Number Name on Account Statement Delivery Option

Send by mail and electronically ▼

Send electronically only

Send by mail and electronically

**STEP 2**

If you choose to turn off paper statements you will no longer receive a regular paper statement of your account in the mail, and you will be notified by email when your statement is available online.

By selecting 'Send electronically only' and clicking Save, you are providing BMO Bank N.A. ("BMO" "we" or "us") your affirmative consent to receive your BMO Credit Card statement electronically as the delivery method.

**Giving Your Consent**

- You agree to receive your BMO Credit Card statement electronically. We will discontinue mailing paper statements unless notified by you in accordance with the instructions in the section "Receiving Paper Statements" below.
- You have reviewed, retained and agree to these Terms and Conditions.
  - Your equipment has the best commercially available encryption, anti-virus and internet security software.
  - You can access and retain a PDF file copy of your statements. If you cannot access a PDF file, visit [adobe.com](http://adobe.com) for information on how to download Adobe® Acrobat Reader®.
- If you change your email address, you must sign on to the online credit card site to update your email so that we can alert you to any such updates.
- For more information about computer and internet security, please visit [www.bmo.com/security](http://www.bmo.com/security).

**Service Charges**

You will not pay any service charges to view your account statement online. If we change this policy, you will be notified in advance and allowed to discontinue your service.

**Additional Disclosure Information:**

**Receiving Paper Statements**

After you have enrolled, you can withdraw your consent to receiving only electronic statements so that you receive paper statements instead by returning to the Statement Delivery Options page and changing your preferences or contacting us at 1-855-825-9231. Withdrawing your consent means you will receive your next monthly statement in the mail.

**Getting Paper Copies**

You may also request paper copies of your BMO Credit Card statement which may incur a charge, by contacting BMO at 1-855-825-9231.

SAVE Cancel

Next, let's explore how to make payments:

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# Make Payments (Set Up and Review Payments)

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**Users can set up or schedule payments by following these simple steps:**

## STEP 1

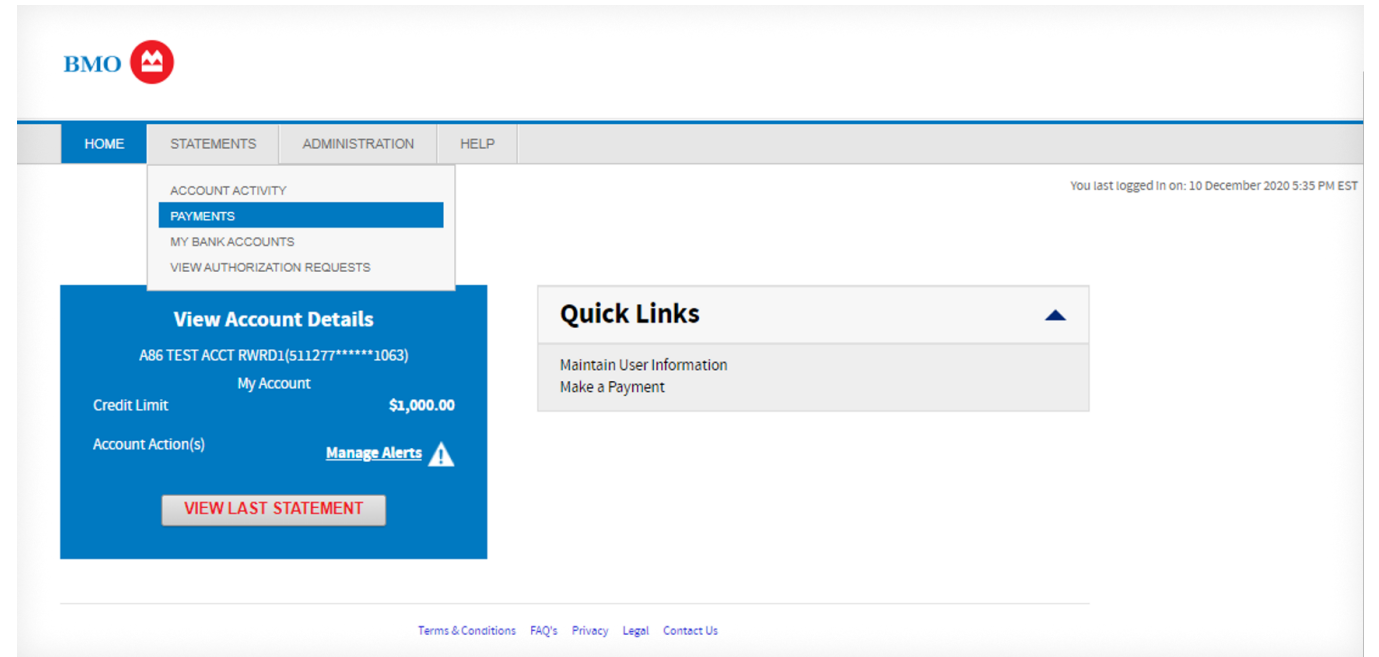
Log on to Credit Card Online Access

Then:

- Click "Make a Payment" under **Quick Links** options.

OR

- Click "STATEMENTS" to reveal the drop down menu
- Click "PAYMENTS" to proceed



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# Make Payments (Set Up and Review Payments, continued)

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## STEP 2: Select account(s):

- If you have access to one account, it will be displayed here. Click "CONTINUE"
- If you have access to more than one account, they will be displayed here. Select the account(s), then click "CONTINUE".

**Individual Cardholders:** view and pay your own card on this page.

**Administrators:** Cardholder accounts can be added to your Payment Queue by clicking the (+) symbol at the beginning of each listing in your Search Results.

**Select Accounts to Make a Payment**

My Accounts [Search for Other Accounts](#)

Actions	Name on Account	Account Number	Statement Balance	Minimum Payment	Payment Due Date	Current Balance	Credit Limit	Settlement Currency
	BDM FLOOR INSTALLERS	1545	40.61	40.61	10/01/2020	79.61	10,000.00	USD

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Continue with Search for Other Accounts:

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**STEP 2 (continued):** If you have access to multiple accounts, choosing the “Search for Other Accounts” tab will allow you to search for other accounts.

**Administrators:** These accounts can be added to your Payment Queue individually by clicking the + symbol at the beginning of each listing in your Search Results

**Select Accounts to Make a Payment**

1 Select Accounts to Make a Payment 2 Define Details 3 Submit Payment

**My Accounts** Search for Other Accounts **< OPTIONAL !**

Please enter search criteria. you can use an asterisk (\*) as a leading or trailing wildcard character.

**Search Account**

Name on Account

Active accounts  Inactive within 45 days  Inactive longer than 45 days

**SEARCH**

**Search Results**

Up to 60 accounts can be selected at one time. Selected accounts:

Selected Accounts: 0

Actions	Name on Account	Account Number	Unit Name	Unit Number	Settlement Currency	Status	Inactive
	***  BDM FLOOR INSTALLERS	****-****-1545	****-****-****	****	USD	AV;FU;LA;OA;PD;TA;YA;;MA	No
	***  SMITH	****-****-3776	****-****-****	****	USD	EM;FU;OA;TA;YA;	No
	***  SMITH	****-****-7214	****-****-****	****	USD	EM;FU;IN;OA;TA;	No

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## STEP 3: Define your Payment Details.



**IMPORTANT:** If no bank account is set up, you will need to “Define Payment Details” and complete the required fields. If a bank account is already set up, select the account to make the payment from.

**Pay From:** Select the Bank Account to make payment from or ‘My Bank Accounts’ to add a new account.

**Payment Date:** Defaults to next available payment date. Go to ‘Account Details – Summary’ for payment due information.

### Payment Option

- Select available payment option, defaults to “Minimum Amount”.
- If you select “Minimum Amount” or “Pay In Full”, the Payment Amount field will be filled in automatically.
- If you select “Other Amount”, 0.00 will be filled in and should be edited to reflect your desired payment amount.

Then:

- Click “MAKE PAYMENT”
- If “MAKE PAYMENT” button is disabled then your account has a credit balance, and no payment is possible at this time.

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Actions	Name on Account	Account Number	Statement Balance	Minimum Payment	Payment Due Date	Current Balance	Credit Limit	Payment Option	Amount
	BDM FLOOR INSTALLERS	1545	40.61	40.61	10/01/2020	79.61	10,000.00	Minimum Amount	40.61

TIP

If any of the payment options are shaded out, it is not an available payment option  
Go to “View Payment Log” icon for payment history or “Account Activity” for details

Continue to Step 4:

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# Make Payments (Set Up and Review Payments, continued)

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## STEP 4: Review and Submit Payment.

Review payment information, then:

- If changes need to be made click "MODIFY" or to cancel, click "CANCEL"
- If payment information is correct, enter your Online Credit Card Password

Then:

- Click "SUBMIT PAYMENT"

**BMO**

HOME STATEMENTS ADMINISTRATION HELP

Select Account Define Details **3 Submit Payment**

### Authenticate and Confirm Payment - BDM FLOOR INSTALLERS (XXXXXXXXXX 1545)

You have requested the following payment:

**Payment Amount**  
40.61

**Fee Amount**  
0.00

*The fee amount is charged to the credit card and is not included in the amount being deducted from the paying account.*

**Withdraw from Account**  
XXXXXXXXXX

**Transit Routing Number**  
075000051

**Requested Payment Date**  
10/26/2020

**Additional Authentication**

**Username**  
bdmfloor

Additional Security Information is required. To make a payment enter your security information below.

**Enter your Online Credit Card Password : \***

.....

**TIP >** Password is required to submit payment and will not be submitted until entered

By clicking Submit Payment I authorize BMO Harris Bank to initiate the payment from the Payment Account displayed above to be applied to the credit card account in the payment amount indicated. If you have any questions about your payment, please call the Contact Center at 1-855-825-9231.

Your payment will not be processed until you click Submit.

**SUBMIT PAYMENT** [Modify](#) [Cancel](#)

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## STEP 5: Payment Confirmation Receipt is displayed.

- Your confirmation is displayed here and in your payment log
- If additional documentation is required, you can print a copy for your records using the print button at the bottom of the screen

The screenshot shows the BMO online banking interface. At the top, there is a navigation bar with the BMO logo and a user profile 'Bob'. Below the navigation bar, there are tabs for 'HOME', 'STATEMENTS', 'ADMINISTRATION', and 'HELP'. A progress indicator shows three steps: 'Select Account', 'Define Details', and 'Submit Payment', with the third step being active. The main content area displays a 'Payment Request Receipt' with the following information:

- Payment has been submitted successfully.
- Confirmation Number: 545-25-20
- Payment Amount: 40.61
- Fee Amount: 0.00
- The fee amount is charged to the credit card and is not included in the amount being deducted from the paying account.*
- Withdraw from Account: [Redacted]
- Transit Routing Number: 075000051
- Requested Payment Date: 10/26/2020
- Account Name: BDM FLOOR INSTALLERS
- Applied to Account: [Redacted] 1545

At the bottom, there is a 'Print this page for your records.' instruction, a 'PRINT' button, and a 'Make Another Payment' link.

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Next, let's look at how to review, cancel or edit payments:

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# Make Payments (Review, Edit Or Cancel Payments)

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**Review payments, plus cancel or edit payments not processed yet, by following these simple steps:**

### STEP 1:

[Log on to Credit Card Online Access](#)

Then:

- Click "STATEMENTS" to reveal the drop down menu
- Click "PAYMENTS", then click the Notepad Icon to reveal the Payment Log

### STEP 2:

- Click "DETAILS" to access payment history and status
- If you wish to Cancel or Edit a payment, go to Step 3

The screenshot shows the BMO Credit Card Online Access interface. The navigation menu includes HOME, STATEMENTS, ADMINISTRATION, and HELP. The main content area displays a "Payment Log for BDM FLOOR INSTALLERS (611277-1545)". Below the title is a table with the following data:

Payment Date	Entry Date	Payment Amount	Confirmation Number	Source	Status	DETAILS
10/30/2020	10/13/2020	40.61	545-19-20	internet	FUTURE	<a href="#">DETAILS</a>

At the bottom of the page, there are links for Terms & Conditions, Privacy, Legal, FAQ's, and Contact Us. A blue callout box labeled "STEP 2" points to the "DETAILS" button in the table.

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Continue to Step 3:

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# Make Payments (Review, Edit Or Cancel Payments, continued)

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## STEP 3: Choose the desired action, CANCEL or EDIT.

**IMPORTANT:** If the payment has already been processed, it can no longer be cancelled or edited and the options will not appear.

### “CANCEL”

- Window prompt will display to confirm you want to cancel the payment by clicking YES or NO.
- After clicking YES, the Payment Log Details will display the payment with the status of CANCELLED.

### “EDIT”

- Change payment criteria.
- Enter your password.
- Click “SAVE DETAILS” to complete and view receipt.

BMO

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### Payment Log Details

[CANCEL](#) [EDIT](#)

Status:	FUTURE	Account Number:	1545
Confirmation Number:	545-19-20	Account Name:	
Return Date:		User Logon:	
Return Description:		Bank Account Type:	Checking
Payment Amount:	40.61	Bank Account Number:	*6789
Fee Amount:	0.00	Transit Routing Number:	
Payment Date:	10/30/2020	Bank Name:	
Entry Date:	10/13/2020		

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To edit a payment, continue to Step 4:

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# Make Payments (Review, Edit Or Cancel Payments, continued)

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## STEP 4: Edit the payment details as desired.

Then:

- Enter your password to confirm your identity
- Click "SAVE DETAILS" to finalize your edits

TIP

Users will only be able to edit or cancel payments that have not been processed yet.

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**BMO**

HOME STATEMENTS ADMINISTRATION HELP

### Edit Payment Log Details

BDM FLOOR INSTALLERS ( ██████████ 1545)

Statement Balance	40.61	Last posted payment	307.11
Past due amount	1.21	Date posted	8/12/2020
Minimum payment due	39.40	Current Balance	79.61
Payment Due Date	10/1/2020	Credit Limit	10,000.00

**Pay From : \***  
BDM checking (\*6789) [?] Select menu option My Bank Accounts to add new accounts

**Payment Amount \***

Pay minimum amount due (39.40)

Pay current balance (79.61)

Pay other amount

40.61

**Payment Date : \*** 10/30/2020

Payments made after ██████████ will be processed the next business day.

Additional Authentication

**Username**  
bdmfloor

**Enter your Online Credit Card Password \***

SAVE DETAILS Cancel

Next, let's look at how to Add a New Bank Account:

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# Manage Account (Add a New Bank Account)

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**Users can add a bank account as an available payment option by following these simple steps:**

### STEP 1

Log on to Credit Card Online Access

Then:

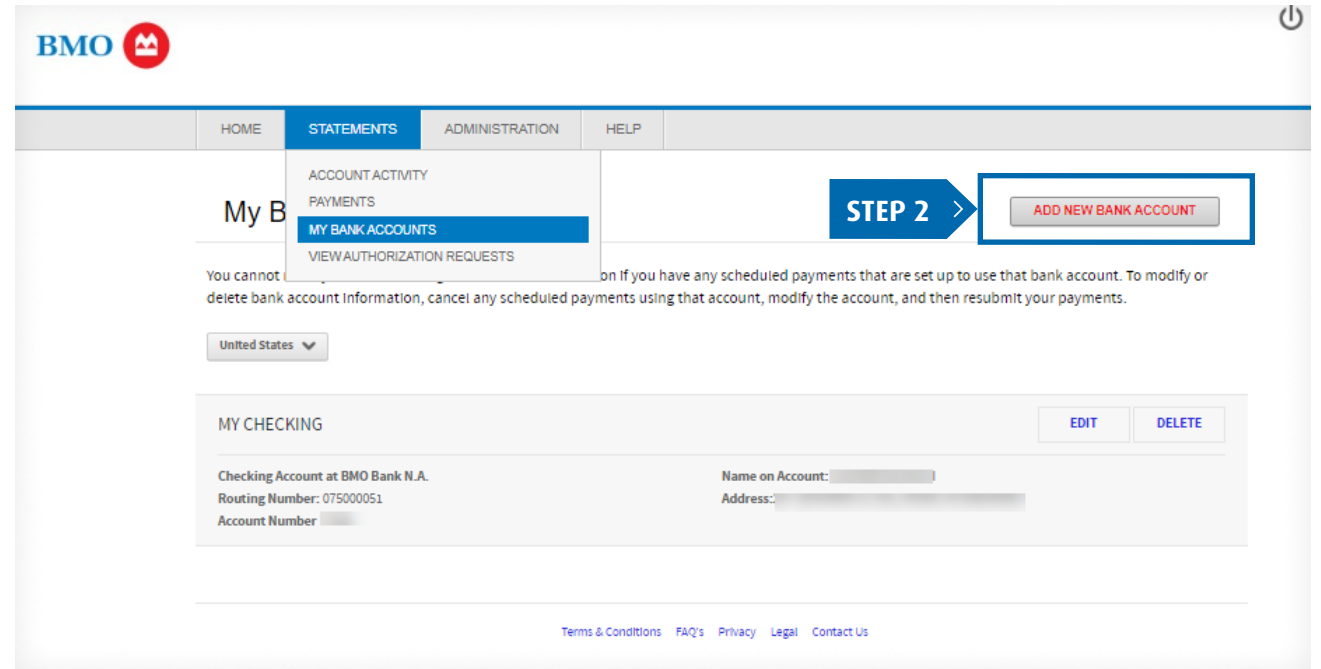
- Click "STATEMENTS" to reveal the drop down menu
- Click "MY BANK ACCOUNTS" to proceed

### STEP 2:

- Click "ADD NEW BANK ACCOUNT"

**TIP**

- Selecting "MY BANK ACCOUNTS" will also reveal any existing account(s) currently available for payment.
- You will have the option to either EDIT or DELETE any existing account(s) by clicking the link of your choice on the right.



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# Manage Account (Add a New Bank Account, continued)

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### STEP 3: Complete the required fields.

Then click "ADD ACCOUNT" to save the new account to your payment options.

TIP

The account number and other account information should reflect the details for you bank deposit account.

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The screenshot shows the BMO website's 'Add New Bank Account' form. At the top left is the BMO logo. A navigation bar contains 'HOME', 'STATEMENTS', 'ADMINISTRATION', and 'HELP'. The form title is 'Add New Bank Account'. It includes several required fields: 'Bank Country \*' (dropdown with 'United States'), 'Account Type \*' (dropdown with 'Select'), 'Account Currency \*' (dropdown with 'Select'), 'Personal/Business \*' (radio buttons for 'Personal' and 'Business', with 'Business' selected), 'Account Number \*' (text input), 'Routing Number [?]' (text input), 'Account Nickname \*' (text input), 'Bank Name' (text input with 'N/A'), 'Name on Account \*' (text input), 'Address Line 1 \*' (text input), 'Address Line 2' (text input), 'City \*' (text input), 'State / Province \*' (dropdown with 'Select'), and 'Postal Code \*' (text input). At the bottom are 'ADD ACCOUNT' and 'Cancel' buttons.

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## Additional help is always available online.

To access the Help Library:

[Log on to Credit Card Online Access](#)

Then:

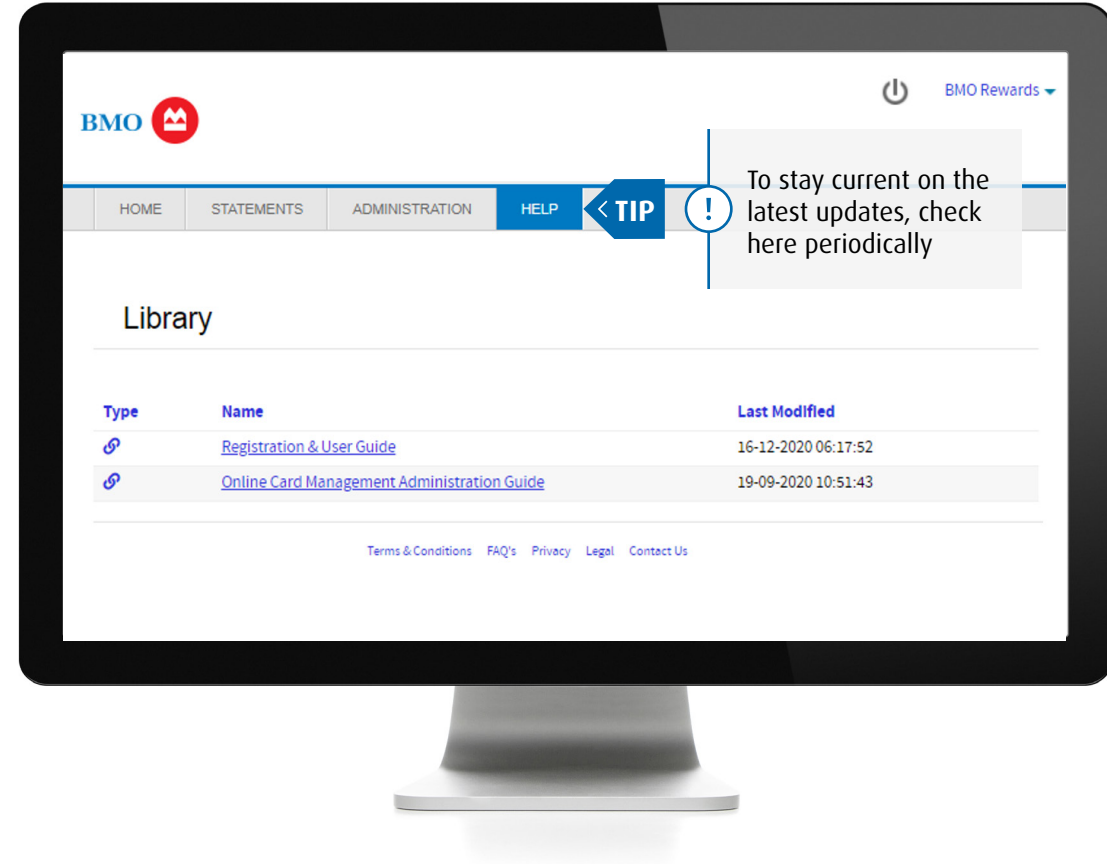
- Click the HELP tab to reveal the drop down menu
- Click "LIBRARY" to access the latest selection of periodically updated user references

Get in touch with our customer care team by visiting [bmo.com/contact](https://bmo.com/contact).

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Thank you for choosing BMO for your business credit card and banking needs