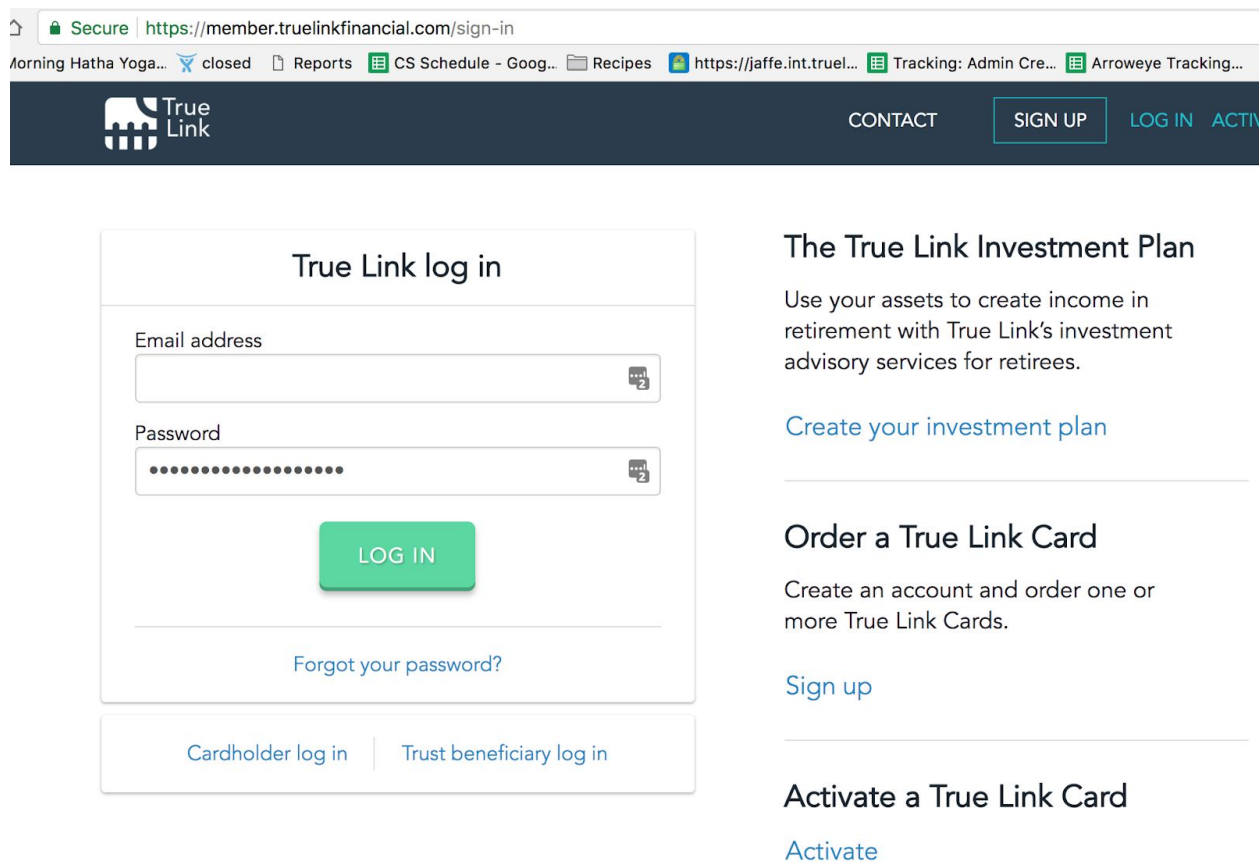


Each month, you need to log into the True Link website (www.truelinkcard.com) and download a copy of your monthly transactions as a CSV file. You will then add a column for descriptions and type in a description of each expense, save the CSV, and upload it to [the monthly report submission form](#).

Here are detailed instructions on how to do this:

First, visit www.truelinkcard.com and click the "Login" button in the top right corner.

The first time you visit the website, you will need to click the link that says "Cardholder log in."



The screenshot shows the True Link website interface. At the top, there is a navigation bar with the True Link logo on the left, and links for "CONTACT", "SIGN UP", "LOG IN", and "ACTIV" on the right. Below the navigation bar is a "True Link log in" form. The form has two input fields: "Email address" and "Password". Below the password field is a green "LOG IN" button. Underneath the button is a link that says "Forgot your password?". At the bottom of the form, there are two links: "Cardholder log in" and "Trust beneficiary log in". To the right of the login form, there are three sections of text. The first section is titled "The True Link Investment Plan" and describes using assets to create income in retirement. Below this is a link "Create your investment plan". The second section is titled "Order a True Link Card" and describes creating an account and ordering cards. Below this is a link "Sign up". The third section is titled "Activate a True Link Card" and has a link "Activate".

Provide the last 4 digits of your Social Security number, your date of birth, and the last 4 digits of your True Link Card number. Then click "Log in."

Cardholder log in

Please enter the last four digits of your Social Security number:

000-00- 1234

Please enter your date of birth:

06/26/1990


Please enter the last four digits of your card number:

0000-0000-0000- 5443

[Log in](#)

[Non-cardholder log in](#)

You will then be able to see the dashboard, which shows you your current balance, your recent transactions, and options for viewing monthly statements and card settings.

 [CONTACT](#) [LOGOUT](#)

Your True Link Card

Current Balance: **\$750.07** [refresh balance](#)

[Recent Transactions](#) [Transaction Report](#) [Monthly Statements](#) [Card Settings](#)

Recent Transactions

[back to top](#)

List of Finalized Recent Transactions

| Date | Description | Amount |
|--------|---------------------------|---------|
| Oct 17 | Transfer - TRUE LINK CARD | \$33.00 |
| Oct 17 | Transfer - TRUE LINK CARD | \$7.00 |

Click on the link for “monthly statements.” The following screen should appear:

Transaction report [back to top](#)

Generate a report of transactions on this card for any time period:

Start date — End date [Open](#) [Download as Spreadsheet](#)

Monthly statements [back to top](#)

Select Month [Open](#) [Download as Spreadsheet](#) [Download as PDF](#)

Card Settings [back to top](#)

These are the settings on your True Link Card. The card only works for purchases set to Allow. To change the settings on your card, talk to your card administrator.

Access to Cash

- ALLOWED Cash withdrawals at ATMs
- ALLOWED Cash withdrawals inside a bank

Under “monthly statements,” select the most recent month, and click “Download as Spreadsheet.”

Save the spreadsheet on your computer, and open the file. Your monthly report spreadsheet will look like this:

| | A | B | C | D | E |
|----|------------|---------------------------|-------------------|----------------------|--------|
| 1 | Cardholder | Card Last 4 Digits | Statement Month | | |
| 2 | Test Card | 1234 | 17-Sep | | |
| 3 | | | | | |
| 4 | Date | Vendor | Location or Phone | Type | Amount |
| 5 | 9/1/17 | Transfer - TRUE LINK CARD | | | 100 |
| 6 | 9/11/17 | WALGREENS STOR | San Francisco CA | Drug Stores | -24.49 |
| 7 | 9/11/17 | WALGREENS STORE 2690 MISS | San Francisco CA | Drug Stores | -13.79 |
| 8 | 9/18/17 | WALGREENS STORE 2690 MISS | San Francisco CA | Drug Stores | -2.99 |
| 9 | 9/22/17 | OFFICEMAX/OFFICEDEPOT6368 | San Francisco CA | Office Supply Stores | -4.32 |
| 10 | 9/29/17 | Transfer - TRUE LINK CARD | | | 250 |
| 11 | | | | | |

Simply add the word “Description” to the cell to the right of “Amount,” and use that column to enter detailed descriptions of your transactions that month. You’ll need to

include details like what you bought and what it was for. If it was for a pre-approved election-related expense, you should specify what race and candidate it was for (or it was in opposition to).

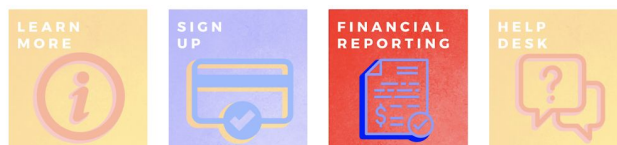
| | A | B | C | D | E | F |
|----|------------|---------------------------|-----------------|---------------|--------|--|
| 1 | Cardholder | Card Last 4 Di | Statement Month | | | |
| 2 | Test Card | 1234 | 17-Sep | | | |
| 3 | | | | | | |
| 4 | Date | Vendor | Location or Ph | Type | Amount | Description |
| 5 | 9/1/17 | Transfer - TRUE LINK CARD | | | 100 | |
| 6 | 9/11/17 | WALGREENS S | San Francisco | Drug Stores | -24.49 | Snacks for phonebank supporting AL candidate Doug Jones for Senate |
| 7 | 9/11/17 | WALGREENS S | San Francisco | Drug Stores | -13.79 | Paper and pens for phonebank supporting AL candidate Doug Jones for Senate |
| 8 | 9/18/17 | WALGREENS S | San Francisco | Drug Stores | -2.99 | Markers for healthcare rally |
| 9 | 9/22/17 | OFFICEMAX/O | San Francisco | Office Supply | -4.32 | Posterboard for healthcare rally |
| 10 | 9/29/17 | Transfer - TRUE LINK CARD | | | 250 | |

In the example above, you can see that the group treasurer specified the purpose of each expense (e.g. “snacks for phonebank”) as well as the race and candidate (“supporting AL candidate Doug Jones for Senate”).

Reminder that you MUST get pre-approval for any spending on federal elections, and this card cannot be used for spending on state and local elections at all. Please submit your requests for pre-approval for political spending [here](#).

Once you’ve added descriptions to all your expenses, click Save to save your work.

Go to <https://www.indivisiblehq.org/distributed-fundraising-financial-reporting> and scroll down to the Monthly Spending Report Form.



Financial Reporting

MONTHLY REPORTING

POLITICAL SPENDING

Each month, you need to log into the True Link website (www.truelinkcard.com) and download a copy of your monthly transactions as a CSV file. You will then add a column for descriptions and type in a description of each expense, save the CSV, and upload to the monthly report submission form below.

Detailed instructions on how to do this can be found [here](#).

Monthly Spending Report Form

Submissions are due by the 10th of every month. If you need a reminder about how to download and prepare your report, [click here](#).

Enter your treasurer and group information

Monthly Spending Report Form

Submissions are due by the 10th of every month. If you need a reminder about how to download and prepare your report, [click here](#).

Treasurer Name*

First Name

Last Name

Group Name*

Group ID (from your enrollment confirmation email)*

Treasurer Email:*

Confirm Treasurer Email:*

Treasurer Phone:

What month is this report for?*

Upload your spreadsheet of monthly charges here:*

Anything else to add?

Submit Form

Upload your monthly report spreadsheet by clicking “No file chosen” under the “Upload your spreadsheet here” header.

Complete the form and hit submit!