BB&T Credit Card Connection for Company Administrators

Instructional Guide
Welcome to BB&T Credit Card Connection!

With BB&T Credit Card Connection you can manage your company Purchasing card program whenever you need to - 24 hours a day, 7 days a week.

This Company Administrator Guide is designed to be a core document to educate you on all the great features and functionality established within the core system. Additional guides may be provided to you in regards to supplement services your company may have enrolled in.

Along with this guide, BB&T Credit Card Connection offers easy, simple and fast page online help through the HELP button located in the top right corner of all pages. The online HELP is page specific and can often assist you with any questions you may have.

Company Administrators may also contact the BB&T Card Account Manager and/or the BB&T Client Services team at 800-397-1253 for technical and training support.
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Connecting to Credit Card Connection

- Go to www.bbtcreditcardconnection.com
- Click on the gold COMPANY ACCESS button under the Registered Company Administrators:

Signing on to Credit Card Connection

- Type your BB&T assigned Username and Click the Logon button
- Type your one-time Temporary Password and Click the Logon button
- The Change Password screen appears. This is where you will set your permanent password known only to you. Complete and click on Submit.

You will now see the Step 1 of 2 – Set Up Your Security Questions screen to complete 4 answers to 4 questions.

- Click on dropdown arrow by each Security Question 1 through 4 to select a question and type in the answer in each of the 4 answers boxes.
  - You cannot use the same answer for more than 1 question
  - Answers must be at least 3 characters
- To register the computer you are on, click on the first circle for “Please register it”. If you do not register the computer, you will be prompted for one or more security question/answers at logon.
- Click the Continue button.

You will now see the Step 2 of 2 – Confirm Your Security Account screen to review your selected Security Questions and Answers.

- TIP – You can print this screen to have Q&A for future reference.
  - Click the Back button to make changes or click on Finish to confirm your selections.

You will now be directed to your View Company List landing page
On your View Company List landing page:
- If you only have one card program, click on View Hierarchy to access this program
- If you have more than one card program, click on View Hierarchy for the specific card program you wish to access
- You will land on the Accounts page

Reviewing the Accounts Page - All accounts under the program

- Card Status defaults to All. You can click on the drop down box to filter by other status.
- Search for User by Card Number. Requires full 16 digit with no hyphens.
- Search for User by Employee ID.
- Search for User by First and Last Name.
- Download or Print Accounts List by clicking on these yellow buttons.
- Cardholder Details are listed here.
  - Blue font offers hyperlink to Cardholder Account Detail.
  - Employee ID is optional and is based on Employee ID field under Add New Cardholder being filled in by the company.
  - Checkmark in User field indicates the cardholder is self-enrolled in Credit Card Connection for online card access.

Navigating within BB&T Credit Card Connection

Company Administrator card program management options are located within the cardholder account profile through blue hyperlinks and through the dropdown box in the Navigation List at the top of each page. The options in the Navigation List are grouped by Main Topics of Accounts, Reporting, Level Options, Payments, Alerts and Messaging.
Common Administrator Tasks

Transaction Report

1. From Accounts page, click on dropdown arrow under Navigation List, and then click on Transaction Report.
2. Choose Account from dropdown box and then select account to run the report on. Can be at Cardholder level or the Billing level.
3. Then select Time Period, Download Format and then hit Download.

Viewing Statements

1. From Accounts page, locate the BL Account and then click on blue account number hyperlink.
2. The Account Detail page for the BL account displays.
4. A list of statements will display. Click on the blue date of the statement you wish to view.
5. Choose Transaction Download and click Download if you want statement report OR
6. Click View Images to view/print/save PDF statement.

View Credit Lines

1. From Accounts page, click on dropdown arrow under Navigation List, and then click on View Credit Lines.
2. This will bring up all accounts with Credit Lines. You can configure the report view by clicking on the Configure Report View and checking/unchecking field headers. You can also download the report.

Level Options
This section provides data on your BB&T card program.

Make Payment – Please note you must first set up a payment funding account under Managing Payment Accounts.

1. From Accounts page, click on dropdown arrow under Navigation List, and then click on Make Payment.
2. Click on Make a Payment to the right of the account to make payment to.
3. Complete the **Payment Information** screen by selecting Payment Account, Payment Amount, Payment Date, Payment Memo, checkmark the box and fill in email address for confirmation.
4. Click on **Submit**.
5. You will now be asked to review the payment again and if all is ok, click on **Make Payment** to send for processing.
6. The **Payment Confirmation** screen will display. Please print and save for your records.

```
Payment Confirmation - 000000050 00000050 COMPANY

Thank you for making your payment. Please print or save a copy for your records. Don’t forget to record this transaction in your checking or savings account register.

Payment Information
Payment Account: acct 1
Financial Institution Name: test bank
Account Number: xxxxx6789
Routing Number: 063000021
Account Type: Checking
Payment Amount: $49,998.74
Payment Date: 8/17/2016
Memo: For bill due
Send confirmation email to: joe@abc.com
Confirmation Number: 3019

Make Another Payment  Payment History
```

**Managing Payment Accounts**

1. To pay bill online, you will first set up a funding account.
2. From **Accounts** page, click on dropdown arrow under **Navigation List**, and then click on **Manage Payments Accounts**.
3. Select **Add Payment Account**, complete all fields listed and click on **Save**.
4. The new account will show in the **Payments Account List** with an Active status.

**To View Payment History**

1. From **Accounts** page, click on dropdown arrow under **Navigation List**, and then click on **Payment History**.
2. The **Payment History** screen appears which shows all payments you have made through Credit Card Connection. You can update or cancel payments that have a pending status.

**Company Administrator Online Servicing Requests**

- From **Accounts** page, click on dropdown arrow under **Navigation List**, and then click on **Online Requests**.
- From the **Online Requests** page, click on the dropdown arrow under **Service Request Types** and select the online request option and click on the **GO** button and then >>>

**FOLLOW THE STEPS IN BLUE ON PAGE 8 FOR SPECIFIC REQUEST PROCESSING**
Add a New Cardholder

1. From the **Company Accounts** screen, select **Online Requests** under the Navigation bar. The **Online Requests** screen below will show.

2. Under **Service Request Types**, select **Add New Cardholder Account** and click **GO**

3. Complete the **New Cardholder Account** form as shown
   - Items marked with * are required (red circle)
   - If your company leverages hierarchy levels, please confirm you have selected the correct hierarchy level to add the cardholder
   - By default, please always fill in cardholder mobile/cell phone number so that BB&T can contact individuals directly to verify card authorizations
   - You may also wish to fill in Employee ID field to use as an additional search item
   - You can always obtain quick help by clicking on the Gold HELP button

3. You can rush card delivery by clicking on the + Rush Card Delivery Key and completing this box. There is a $25 rush fee which is charged to the new card account.

4. Fill in **Memo** box and then click on the **Continue** button

5. Confirm **New Cardholder Account** request and if all is correct, click on **Submit** to process
Address and Phone Change
1. Select Cardholder account from dropdown box to access their profile.
2. Key the address or phone number change and fill in Memo box
3. Click on the Continue button.
4. Confirm change request on the Address and Phone Change Review page
5. Click on Submit to process

Change Cardholder Authorization Block
1. Select Cardholder account from dropdown box to access their profile.
2. Change the block status to Add Block (card is blocked from use) or Remove Block (card is ready to use) and fill in the Memo box
3. Click on the Continue button.
4. Confirm change request on the Review Change Cardholder Authorization Block page
5. Click on Submit to process

Change Credit Limit
1. Select Cardholder account from dropdown box to access their profile.
2. Change the limit as a Permanent Increase (no expire date) or Temporary Increase (with expire date) following the page requirements and then fill in the Memo box
3. Click on the Continue button.
4. Confirm change request on the Review Change Credit Limit page
5. Click on Submit to process

Close an Account
1. Select Cardholder account from dropdown box to access their profile.
2. Choose Reason for Closing Account (one reason) and then fill in the Memo box
3. Click on the Continue button.
4. Confirm change request on the Review Close Account page
5. Click on Submit to process

Request a Replacement Card
1. Select Cardholder account from dropdown box to access their profile.
2. Choose Reason for Card Replacement (one reason) and then fill in the Memo box
3. Click on the Continue button.
4. Confirm change request on the Review Card Replacement page
5. Click on Submit to process

By default, BB&T sets up all commercial card programs with no Cash or ATM access. If the company wants this access, they will select this option on the New Account documents.

For Commercial Card programs of which the company has enrolled for Cash and ATM access, the Company Administrator will be able to view Add Cash and ATM PIN Access options on the Online Requests page and under the Service Requests Types dropdown box.
My Company Alerts

My Company Alerts allows the Company Administrator to select and assign alerts on the company program. From this page, click on the Create My Company Alerts link.

1. The below screen will appear. Check the box by each alert you wish to activate and then fill in the alert text box with the required information.
2. Select Billing or Card Account under dropdown arrow.
3. Click the Submit button to save.