Credit Card Connection
Tutorial
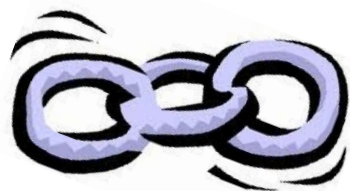
Quick Links Menu
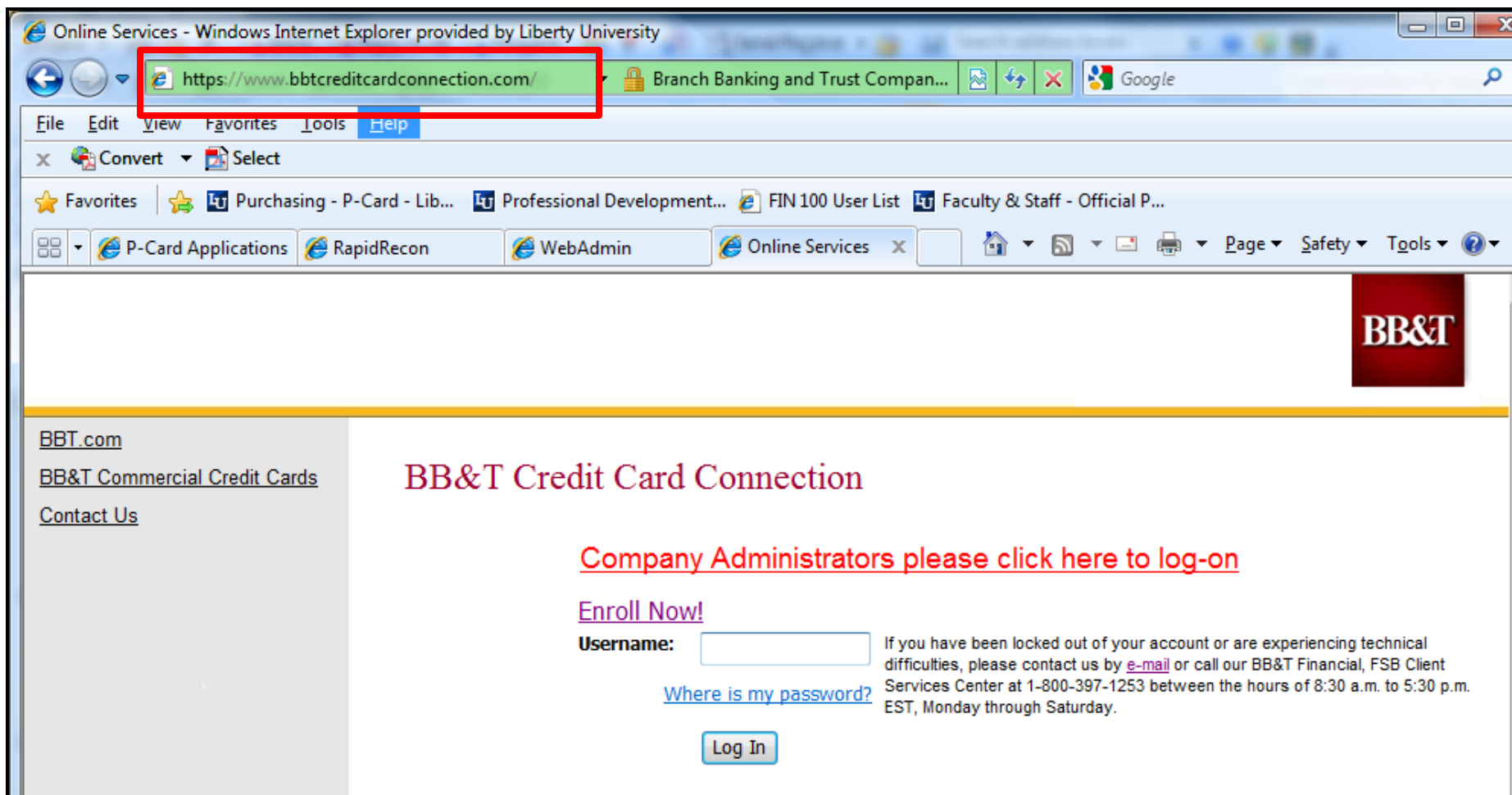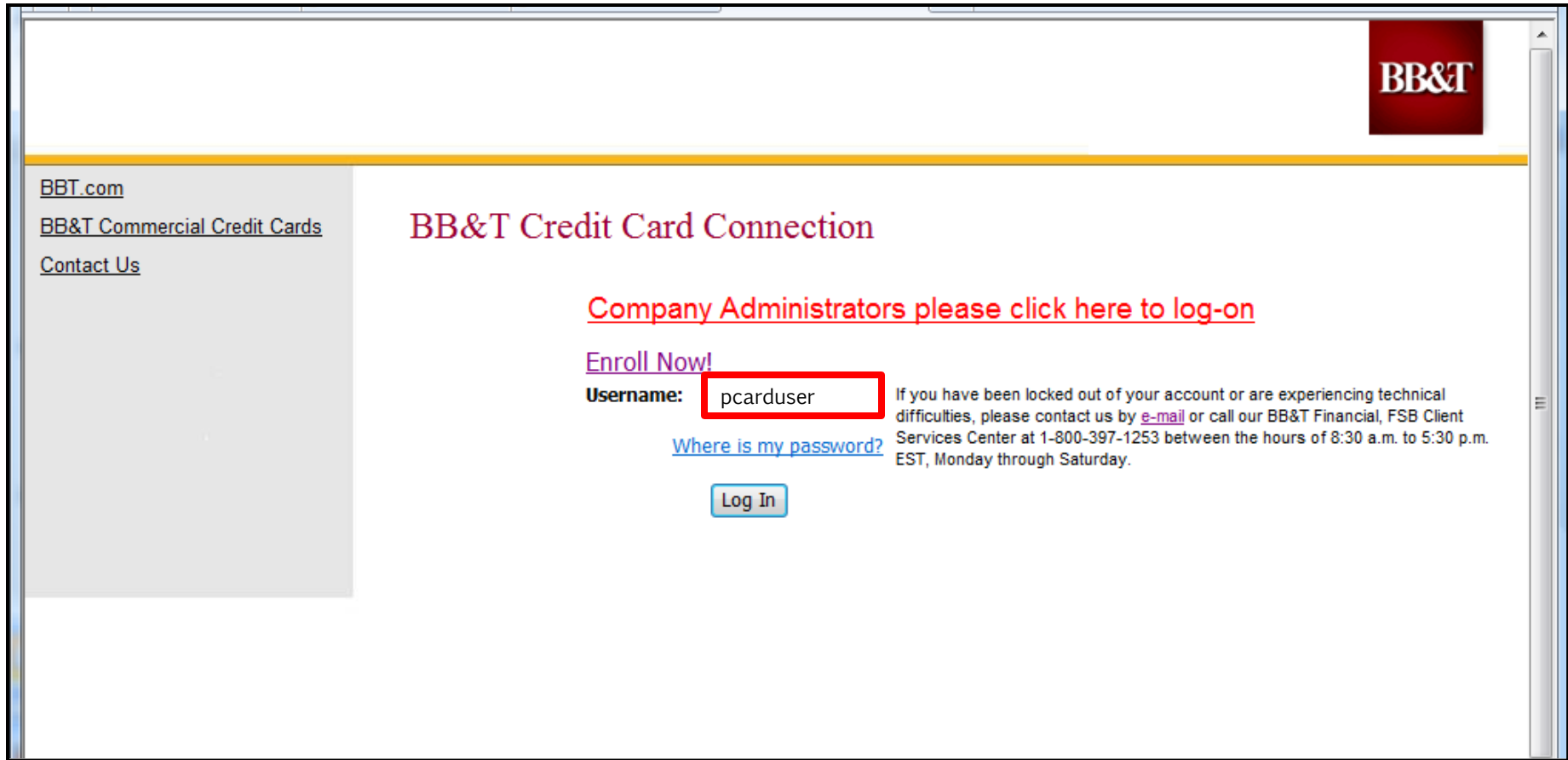
Logging into BB&T

To log into your BB&T Credit Card Connection account, visit www.bbtcreditcardconnection.com as shown above.

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Logging into BB&T

Next, enter your Username.

Logging into BB&T

Enter your Password, then click 'Log In.'

Account Summary

BB&T Credit Card Connection

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Log Off

Account Summary

Credit Card Account Number: ####-####-####-1234 (pcarduser)
Cardholder: P-Card User

HELP   PRINT

Balances are current as of Friday, June 24, 2011 at 8:56 AM

Current Account Summary	
Account Balance: View Transactions	$0.00
Cash Balance:	$0.00
Pending Balance: View Detail	$0.00
Available Credit:	$50,000.00
Available Cash:	$0.00
Credit Limit:	$50,000
Cash Limit:	$0
Past Due Amount:	$0.00
Overlimit Amount:	$0.00
Account Status:	Open
Last Activity Date:	2/26/2010
Cardholder Since:	10/3/2008

Access your account anytime anywhere, 24 hours a day and 7 days a week.

Get up to date account information such as your available credit, recent transactions, and payment information, or pay your credit card bill online.

Welcome to your 'Account Summary!'

The Account Summary provides your P-Card balance (posted transactions), pending transactions, and monthly available credit. You'll also find your monthly credit limit which refreshes on the 3rd day of each month.

Viewing Posted Transactions

Click the 'View Transactions' link to view a list of posted P-Card transactions.

Searching for Transactions

The 'View Transactions' screen provides the ability to search transaction history based upon specific criteria.

Click 'transaction search.'

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Searching for Transactions

You can search your transactions by entering a 'Date Posted,' a dollar 'Amount,' 'Type,' or 'Expense Category.'

Searching for Transactions

If you are selecting a date other than what initially appears in the calendar, please be patient. The date is entered by first selecting the month, then year, then day. You may have to wait a couple moments before it recognizes your selection.

Searching for Transactions

Select 'All' for the most comprehensive search. Some of the 'Type' choices will not apply to your P-Card use.

Searching for Transactions

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Search Transactions

Credit Card Account Number: ####-####-##
Cardholder: P-Card User

PRINT

You can create and save as many unique transaction searches as you would like.

Use any combination of the options below to search for transaction activity for your account.

Date Posted   After ▾   2/14/2010

Description

Type   All ▾

Search

Transaction Searches

Search ▾

No Records Available

Amount

Memo

Expense Category

Gifts Given
Groceries
Health & Medical
Home Repair
Household
Insurance
Legal And Professional
Miscellaneous
Payment
Personal Care
Pet Care
Recreation
Rent
Subscriptions & Memberships
Taxes
Transfer of Balance
Travel
Utilities
Work Related

You may categorize your expenses within BB&T Credit Card Connection. Once the P-Card expenses are categorized, you can pull transactions based upon the created categories. If you have not yet categorized your expenses or prefer a comprehensive search, select 'All.'

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Searching for Transactions

Once you enter your preferred search criteria, click 'Search.'

Searching for Transactions

Pictured above are the Transaction Search Results. Click 'Expense View' and the transactions will be summed by Expense Type. See the next slide.

Searching for Transactions

Above is the 'Expense View,' click 'Normal View' to return to the previous screen.

Searching for Transactions

Transaction details may be obtained by clicking on the Vendor name.

Expense Categorizing

When in the Transaction Detail view, you can assign or change the Expense Category. An expense category may be assigned by clicking the drop down arrow.

Expense Categorizing

Then select the category that most closely corresponds to the expense.

Click 'Submit.'

Expense Categorizing

Click 'Return to Transaction List' in order to categorize additional P-Card Transactions.

Expense Categorizing

You'll notice a 'Dispute this Transaction' link. Please contact the Purchasing Department to report a dispute. Do not submit a dispute via the BB&T Credit Card Connection website.

To return to the Transaction List, click 'Return to Transaction List.'

Exporting Transactions

The site allows you to download your P-Card transactions into an Excel Spreadsheet. In order to do this, click on the yellow 'Download' button.

Exporting Transactions

Click 'Open' or 'Save' to open the Excel spreadsheet.

Exporting Transactions

The P-Card transactions are displayed above in an Excel Spreadsheet. The Excel spreadsheet provides flexibility to sort and analyze your P-Card transactions.

Exporting Transactions

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Transaction Search Results

Credit Card Account Number: ####-####-####-1234 (pcarduser)
Cardholder: P-Card User

HELP   PRINT

The listed transactions met the transaction search criteria you entered. You may save this search for future use by providing a name for the search and selecting the Save button or download the results of the search.

If you do not find the transactions you are looking for, you can return to transaction search and enter new search criteria.

Save this search as: Transaction Download

PCard Transactions   Save   Excel/Spreadsheet

Expense View   DOWNLOAD

Posting Date ▼	Trans Date	Type	Description	Expense Category	Amount
2/26/2010	2/24/2010	Purchase	CHILI'S CLT 10451292	Dining Out	$12.15
2/26/2010	2/24/2010	Purchase	STARBUCKS F TP10191542	Dining Out	$2.79
2/26/2010	2/24/2010	Purchase	USAIRWAYS 0372379955079	Travel	$50.00
2/25/2010	2/24/2010	Purchase	RPS Lynchburg Q02	Auto Related	$32.00
2/23/2010	2/21/2010	Purchase	SB & J NEWS CONNECTION	Groceries	$2.59
2/23/2010	2/21/2010	Purchase	MIDTOWN SUNDRIES	Dining Out	$7.61
2/23/2010	2/22/2010	Purchase	COLUMBIA RESTAURANT 0105	Dining Out	$28.29
2/23/2010	2/21/2010	Purchase	USAIRWAYS 0372379647581	Travel	$25.00
2/22/2010	2/21/2010	Purchase	PUBLIX #28	Groceries	$3.41

Total Debit Transactions: $163.84
Total Credit Transactions: $0.00

Return to the main menu by clicking on 'Accounts' listed in the left hand margin.

Statements

Click 'View Transactions' once again.

Statements

You can pull 'statements' by clicking the drop down arrow next to 'Since my last statement.'

Statements

Select the statement of your choice by highlighting the listing.

Statements

The transactions corresponding to the selected statement are displayed in the screen above.

Click on 'Accounts' in the left hand margin to return to the main menu.

Viewing Pending Transactions

Click on 'View Detail' to view the transactions that have been incurred (pending), but not yet posted.

Viewing Pending Transactions

This session does not have pending P-Card transactions. Not all transactions appearing in the Outstanding Transactions screen will post.

Click 'Return to Summary' to return to the main menu.

Viewing Pending Transactions

Notice the column in the left hand margin. As you click on each heading, the heading expands.

Viewing Pending Transactions

When 'Transactions' is clicked, it expands to 'Find Transactions,' 'Current Transactions,' and 'Reports.'

Viewing Pending Transactions

'Find Transactions' leads us to the screen above where we can search for specific transactions.

**Please see slides <u>8-13</u> to review transaction searches.

Viewing Pending Transactions

A list of 'Current Transactions' will appear in the screen above when clicking the 'Current Transactions' link above.

Reports

BB&T Credit Card Connection

BB&T

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Expense Report Request

Credit Card Account Number: ####-####-####-1234 (pcarduser)
Cardholder: P-Card User

HELP   PRINT

Hold the cursor over a Saved Report name to view a description of the report.

Saved Reports
You have no saved reports.

Select Report

Select the expense report you would like to run, then enter a date range.

◉ Full Expense Report
◎ Ten Most Expensive Purchases Report
◎ Top 10 Expense Categories Report
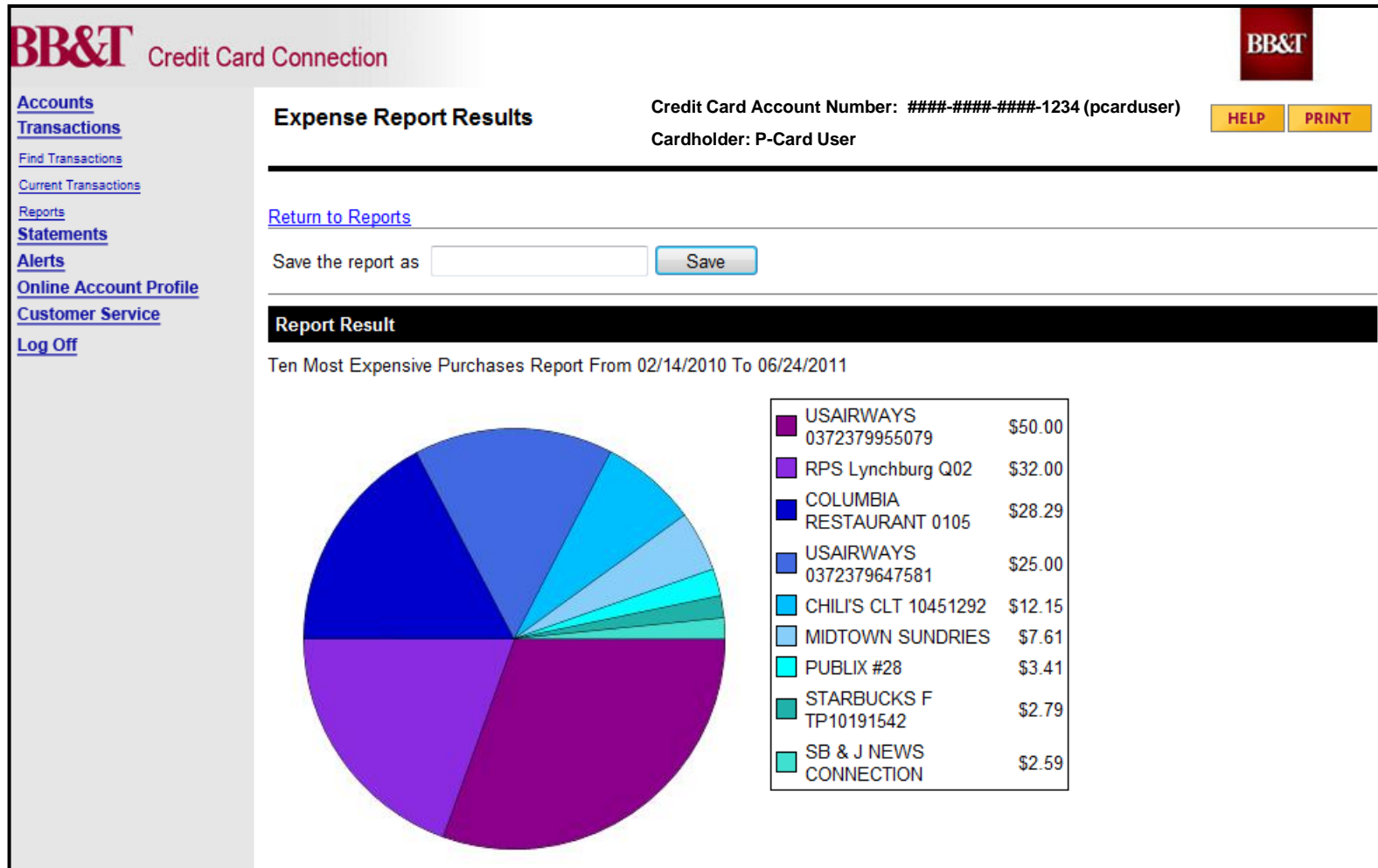◎ Top 10 Merchants Report

From: _____

To: _____

You can view up to 18 months worth of transactions.

Submit

The 'Reports' link allows you to create and save reports.

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Reports

Select the expense report you'd like to run by filling in the corresponding radio button, enter the date range, and click 'Submit.'
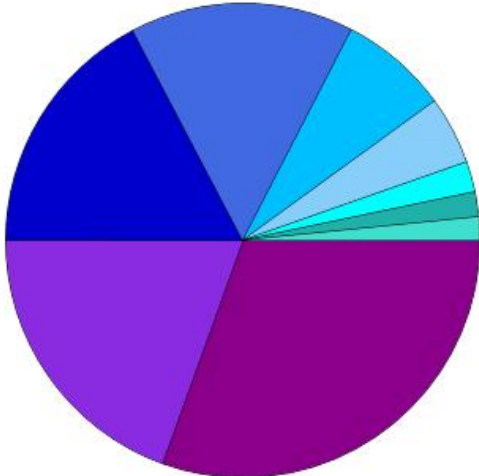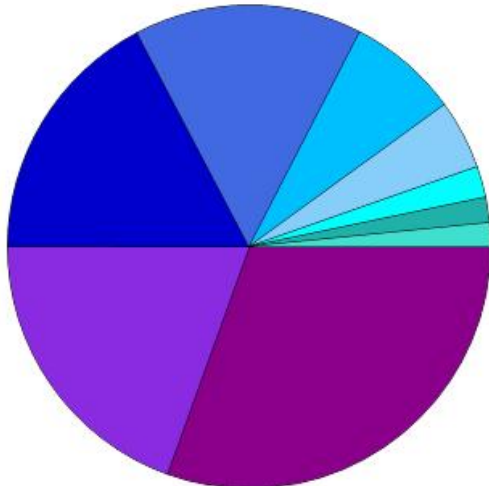
Reports

What a fancy report!

Reports

You can save the report by providing a name above and clicking 'Save.'

Reports

Click 'Return to Reports.'

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Reports

See the saved report listed above. If you click the report name, the report will open. If you no longer need the report, click 'Delete.'

Reports

Click the 'Statements' link. The site will open a separate window to the 'Statements' page.

Reports

The new page will look similar to the one above. This 'Statements' link is a bit deceiving since <u>Statements</u> are not accessible through this page.

Alerts

Quick Links Menu

Alerts are next! You can create an alert to remind you to reconcile or to prompt you when nearing your P-Card's monthly limit. Click **'Custom Alerts.'**

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Alerts

Click 'Create a New Alert.'

Alerts

Alerts may be sent to your Liberty email address or to your cellular device. Alerts can be set for a number of events. Try it out for yourself!

Alerts

I'm creating an alert to remind myself to reconcile! Click 'Submit!'

At the bottom of the screen, BB&T reminds us that BB&T is not responsible for text messaging charges. Be careful!!

Alerts

See the new alert listed. The alert maybe disabled, modified or deleted.

To place a second alert or to return to the Main Alerts Page, click the corresponding links above.

Online Account Profile

Listed below 'Alerts' is 'Online Account Profile.' The **'Online Account Profile' allows you to make minor changes to your BB&T Account profile.**

Online Account Profile

The email address may be changed.

Online Account Profile

Your BB&T Credit Card Connection password may be updated.

Online Account Profile

The <u>contact number</u> for BB&T needed in order to report your P-Card as lost or stolen. Don't forget to contact the Purchasing Office as well.

Online Account Profile

Messages sent to BB&T through this website are accessible through this site by clicking on 'Inbox,' 'Sent,' or 'Archived Items.'

NOTE: **When establishing your BB&T Credit Card Connection account, please keep your password in a safe place.**

If you forget or lose your password, please contact the customer service phone number on the reverse side of your P-Card (1-800-397-1253).   Purchasing cannot reset passwords.