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Logging into BB&T

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

Next, enter your Username.
Logging into BB&T

Enter your Password, then click ‘Log In.’
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.
Click the ‘View Transactions’ link to view a list of posted P-Card transactions.
The ‘View Transactions’ screen provides the ability to search transaction history based upon specific criteria.

Click ‘transaction search.’
You can search your transactions by entering a ‘Date Posted,’ a dollar ‘Amount,’ ‘Type,’ or ‘Expense Category.’
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.
Select ‘All’ for the most comprehensive search. Some of the ‘Type’ choices will not apply to your P-Card use.
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.’
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.
Transaction details may be obtained by clicking on the Vendor name.
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.’
Click **Return to Transaction List** in order to categorize additional P-Card Transactions.
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.’
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.
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

Return to the main menu by clicking on 'Accounts' listed in the left hand margin.
Click ‘View Transactions’ once again.
You can pull ‘statements’ by clicking the drop down arrow next to ‘Since my last statement.’
Select the statement of your choice by highlighting the listing.
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

Account Summary

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

<table>
<thead>
<tr>
<th>Current Account Summary</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Balance:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Cash Balance:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Pending Balance:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Available Credit:</td>
<td>$50,000.00</td>
</tr>
<tr>
<td>Available Cash:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Credit Limit:</td>
<td>$50,000</td>
</tr>
<tr>
<td>Cash Limit:</td>
<td>$0</td>
</tr>
<tr>
<td>Past Due Amount:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Overlimit Amount:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Account Status:</td>
<td>Open</td>
</tr>
<tr>
<td>Last Activity Date:</td>
<td>2/26/2010</td>
</tr>
<tr>
<td>Cardholder Since:</td>
<td>10/3/2008</td>
</tr>
</tbody>
</table>

Click on ‘View Detail’ to view the transactions that have been incurred (pending), but not yet posted.
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.
Notice the column in the left hand margin. As you click on each heading, the heading expands.
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 8-13 to review transaction searches.**
A list of 'Current Transactions' will appear in the screen above when clicking the 'Current Transactions' link above.
The ‘Reports’ link allows you to create and save reports.
Select the expense report you’d like to run by filling in the corresponding radio button, enter the date range, and click ‘Submit.’
What a fancy report!
You can save the report by providing a name above and clicking ‘Save.’
Click ‘Return to 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.’
Click the ‘Statements’ link. The site will open a separate window to the ‘Statements’ page.
The new page will look similar to the one above. This ‘Statements’ link is a bit deceiving since Statements are not accessible through this page.
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.’
Click ‘Create a New Alert.’
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!
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!!
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.
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.
Your BB&T Credit Card Connection password may be updated.
The **contact number** 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.