



# Card Member Managers

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## Card Manager Accounts

Role  
Card Manager

Filter by keyword

	CARDMEMBER NAME	SITE NAME	CARD NUMBER	CYCLE	STATUS	TRANSACTIONS	TRANSACTION TOTAL	APPROVALS			
								CM	CMgr	BCA	AM
	> DAN F MEAD	US CPC	X-21004	05/11/17	Open	153	20,978.17				
	> SUSAN F CAMPBELL	US CPC	X-33008	05/11/17	Open	16	32,171.90				

Showing 1-2 of 2



This is the account overview screen, showing all the cards that you manage. **Click here** to expand the account.



## Card Manager Accounts

Role

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Filter by keyword



CARDMEMBER NAME ↕	SITE NAME ↕	CARD NUMBER ▲	CYCLE	STATUS	TRANSACTIONS	TRANSACTION TOTAL	APPROVALS			
							CM	CMgr	BCA	AM
			05/11/17	Open	153	20,978.17				
			04/11/17	Closed	142	19,787.41				
			03/12/17	Closed	122	21,597.08	CM	CMgr		
			02/10/17	Closed	159	29,232.41	CM	CMgr		
			01/10/17	Closed	72	14,750.18	CM	CMgr		
			12/10/16	Closed	101	18,594.16	CM	CMgr		
▼ DAN F MEAD	US CPC	X-21004	11/10/16	Closed	175	26,552.38	CM	CMgr		



Once a card is expanded, you will see details for up to 13 billing previous cycles of that particular card.

To view the transaction list for a particular cycle, **click on that cycle (on the right half of the screen.)**



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DAN F MEAD (X-21004)  
US CPC

Billing Cycle  
03/12/17 - 04/11/17

UPLOAD RECEIPTS

ALL TRANSACTIONS 142

NO RECEIPTS ADDED 55

NOT REVIEWED 25

NEEDS APPROVAL 138

Filter by keyword  Only transactions with an exception note

Selected Transactions: 0 of 142

EXPORT REALLOCATE (0) ADD RECEIPT APPROVE

	DATE	MERCHANT	Description 1	AMT. (USD)	APPROVALS CM CMgr	Company Code	Cost Center
<input type="checkbox"/>	04/11/17	STAPLES SCC MO 2471	ORD 7174418549-000-0;REQ DAN F MEAD	39.77	CM	1002	10288
<input type="checkbox"/>	04/11/17	STAPLES SCC MO 2471	ORD 7174406151-000-0;REQ DAN F MEAD	48.97	CM CMgr	1002	10381
<input type="checkbox"/>	04/11/17	STAPLES SCC MO 2471	ORD 7174406151-000-0;REQ DAN F MEAD	273.45		1001	13662
<input type="checkbox"/>	04/11/17	STAPLES SCC MO 2471	ORD 7174388033-000-0;REQ DAN F MEAD	347.79	CM CMgr	1001	11733

**i**

If your company has approvals enabled for Card Member and CM Manager roles, managers will see a "Needs Approval" tab instead of a "Needs Submission" tab.

**ii**

You can click on the Approval column headings (CM, CMgr, etc.) to sort the transactions by approval status, for example, to see which transactions have been approved by the Card Member.



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**DAN F MEAD (X-21004)**  
US CPC

Billing Cycle

03/12/17 - 04/11/17

[UPLOAD RECEIPTS](#)

<b>ALL TRANSACTIONS</b> <b>142</b>	<b>NO RECEIPTS ADDED</b> <b>55</b>	<b>NOT REVIEWED</b> <b>25</b>	<b>NEEDS APPROVAL</b> <b>138</b>
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Filter by keyword

Only transactions with an exception note

Selected Transactions: 3 of 142

[EXPORT](#)

[REALLOCATE \(3\)](#)

[ADD RECEIPT](#)

[APPROVE](#)

	DATE	MERCHANT	Description 1	AMT. (USD)	APPROVALS	Company Code	Cost Center
					CM CMgr		
<input checked="" type="checkbox"/>	04/11/17	STAPLES SCC MO 2471	ORD 7174418549-000-0;REQ DAN F MEAD	39.77	CM	1002	10288
<input type="checkbox"/>	04/06/17	STAPLES SCC MO 2471	ORD 7174170650-000-0;REQ DAN F MEAD	15.97	CM	1001	10141
<input type="checkbox"/>	04/06/17	STAPLES SCC MO 2471	ORD 7173608295-000-0;REQ DAN F MEAD	35.99	CM	1001	10025
<input checked="" type="checkbox"/>	04/06/17	STAPLES SCC MO 2471	ORD 7174191761-000-0;REQ DAN F MEAD	3.39	CM	1005	11027

**i**

If allowed by your company settings, you can select several transactions and approve them all at once.

**ii**

Select the desired transactions and click the Approve button.



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DAN F MEAD (X-21004)  
US CPC

Billing Cycle

03/12/17 - 04/11/17

UPLOAD RECEIPTS

ALL TRANSACTIONS 142

NO RECEIPTS ADDED 55

NOT REVIEWED 25

**NEEDS APPROVAL 138**

Filter by keyword

Only transactions with an exception note

APPROVE ALL

Selected Transactions: 0 of 138

EXPORT

REALLOCATE (0)

ADD RECEIPT

APPROVE

<input type="checkbox"/>	DATE	MERCHANT	Description 1	AMT. (USD)	APPROVALS CM CMgr	Company Code	Cost Center
<input type="checkbox"/>	04/11/17	STAPLES SCC MO 2471	ORD 7174418549-000-0;REQ DAN F MEAD	39.77	CM	1002	10288
<input type="checkbox"/>	04/06/17	STAPLES SCC MO 2471	ORD 7174170650-000-0;REQ DAN F MEAD	15.97	CM	1001	10141
<input type="checkbox"/>	04/06/17	STAPLES SCC MO 2471	ORD 7173608295-000-0;REQ DAN F MEAD	35.99	CM	1001	10025
<input type="checkbox"/>	04/06/17	STAPLES SCC MO 2471	ORD 7174191761-000-0;REQ DAN F MEAD	3.39	CM	1005	11027

You can also go to the "Needs Approval" tab, and click the "Approve All" button to approve all transactions at once, (if allowed by company settings).