



BCA Managers



BCA Accounts

Role

BCA Manager

Filter by keyword

BCA NUMBER ^	SITE NAME ⇅	BCA NAME ⇅	DESCRIPTION ⇅	CYCLE	STATUS	TRANSACTIONS	TRANSACTION TOTAL	APPROVALS			
								CM	CMgr	BCA	AM
> 376420855390339	US CPC	IRENE W WILSON	Misc Travel	05/11/17	Open	60	3,481.49				
> 376423761090337	US CPC	P JOHN RYAN	Central Telecom	03/12/17	Closed	2	492,160.82				
> 376428392290332	US CPC	JILL V JACOBS	Office Supplies	05/11/17	Open	158	77,308.96				
> 376428475390339	US CPC	S RON JAMES	Marketing	05/11/17	Open	498	255,867.74				
> 376428877290334	US CPC	SUSAN HUNT	Meeting Travel	05/11/17	Open	64	296,052.00				

Showing 1-5 of 5

This is the Accounts & Cycles Summary page, which shows individual BCA's, along with the site name and BCA description.

The cycle lock status and approval status are the same as in the Card Member view (see page 6), except they apply to the entire BCA.



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Marketing
US CPC

Billing Cycle

03/12/17 - 04/11/17

ALL TRANSACTIONS
502

NO RECEIPTS ADDED
498

NOT REVIEWED
203

NEEDS APPROVAL
502

Filter by keyword

Only transactions with an exception note

Selected Transactions: 0 of 502

EXPORT

REALLOCATE (0)

ADD RECEIPT

APPROVE

☐	DATE ▼	MERCHANT ⇅	Cardmember Nar ▼ ⇅	AMT. (USD) ⇅	APPROVALS			Company Code ▼ ⇅	Cost Center ▼ ⇅
					CM	CMgr	BCA		
☐	04/11/17	C3 NETWORKS INC	M P HILL	480.00	CM	CMgr	1002	12907	
☐	04/11/17	FACEBOOK ADVERTISING USA	VINCE A MURPHY ESQ	530.61	CM	CMgr	1001	13412	
☐	04/11/17	FACEBOOK ADVERTISING USA	VINCE A MURPHY ESQ	1,469.62	CM	CMgr	1002	10390	
☐	04/10/17	KROGER GROCERY	KAREN EDITH XENG	25.00			1001	10053	

i

Once you select a particular BCA and Cycle, you will see the transaction list. The BCA name or description as well as the site name are shown here

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In the transaction list, you will see a column with the Card Members names. You can change what you see in this column using the dropdown menu.



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Marketing US CPC

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

Summary cards: ALL TRANSACTIONS 502, NO RECEIPTS ADDED 498, NOT REVIEWED 203, NEEDS APPROVAL 502

Filter by keyword Only transactions with an exception note

Selected Transactions: 3 of 502 EXPORT REALLOCATE (3) ADD RECEIPT APPROVE

Table with columns: DATE, MERCHANT, Cardmember Nar, AMT. (USD), APPROVALS, Company Code, Cost Center. Contains 4 transaction rows.

You can select multiple transactions for bulk reallocation or approval.



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Marketing US CPC

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

ALL TRANSACTIONS 502 NO RECEIPTS ADDED 498 NOT REVIEWED 203 **NEEDS APPROVAL 502**

Filter by keyword Only transactions with an exception note **APPROVE ALL**

Selected Transactions: 0 of 502

EXPORT REALLOCATE (0) ADD RECEIPT APPROVE

	DATE	MERCHANT	Cardmember Nar	AMT. (USD)	APPROVALS	Company Code	Cost Center
					CM CMgr BCA		
<input type="checkbox"/>	04/11/17	C3 NETWORKS INC	M P HILL	480.00	CM CMgr	1002	12907
<input type="checkbox"/>	04/11/17	FACEBOOK ADVERTISING USA	VINCE A MURPHY ESQ	530.61	CM CMgr	1001	13412
<input type="checkbox"/>	04/11/17	FACEBOOK ADVERTISING USA	VINCE A MURPHY ESQ	1,469.62	CM CMgr	1002	10390
<input type="checkbox"/>	04/10/17	KROGER GROCERY	KAREN EDITH XENG	25.00		1001	10053

In the "Needs Approval" tab, you can click the "Approve All" button to approve all transactions at once, (if allowed by your company's settings).



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Marketing US CPC

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

Summary cards: ALL TRANSACTIONS 502, NO RECEIPTS ADDED 498, NOT REVIEWED 203, NEEDS APPROVAL 502

Search input field containing 'vince' with an information icon 'i' to its left.

Only transactions with an exception note

Selected Transactions: 0 of 234

EXPORT REALLOCATE (0) ADD RECEIPT APPROVE

Table with columns: DATE, MERCHANT, Cardmember Nar, AMT. (USD), APPROVALS, Company Code, Cost Center. Contains 4 rows of transaction data.



The "Filter by Keyword" feature allows you to filter the transaction list. You can search for transactions based on date, merchant, amount, accounting code, or information in selectable transaction column. In this example, the user was searching for all transactions from a particular Card Member.



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Marketing US CPC

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

Summary cards: ALL TRANSACTIONS 502, NO RECEIPTS ADDED 498, NOT REVIEWED 203, NEEDS APPROVAL 502

Search input field containing '13223' with an information icon 'i' to its left.

Only transactions with an exception note

Selected Transactions: 0 of 4

EXPORT REALLOCATE (0) ADD RECEIPT APPROVE

Table with columns: DATE, MERCHANT, Cardmember Nar, AMT. (USD), APPROVALS, Company Code, Cost Center. Contains 4 transaction rows.

In this example, the user was searching for all transactions hitting Cost Center 13223.