

Global Card Access

Global User Guide – Program Administrators

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Introduction

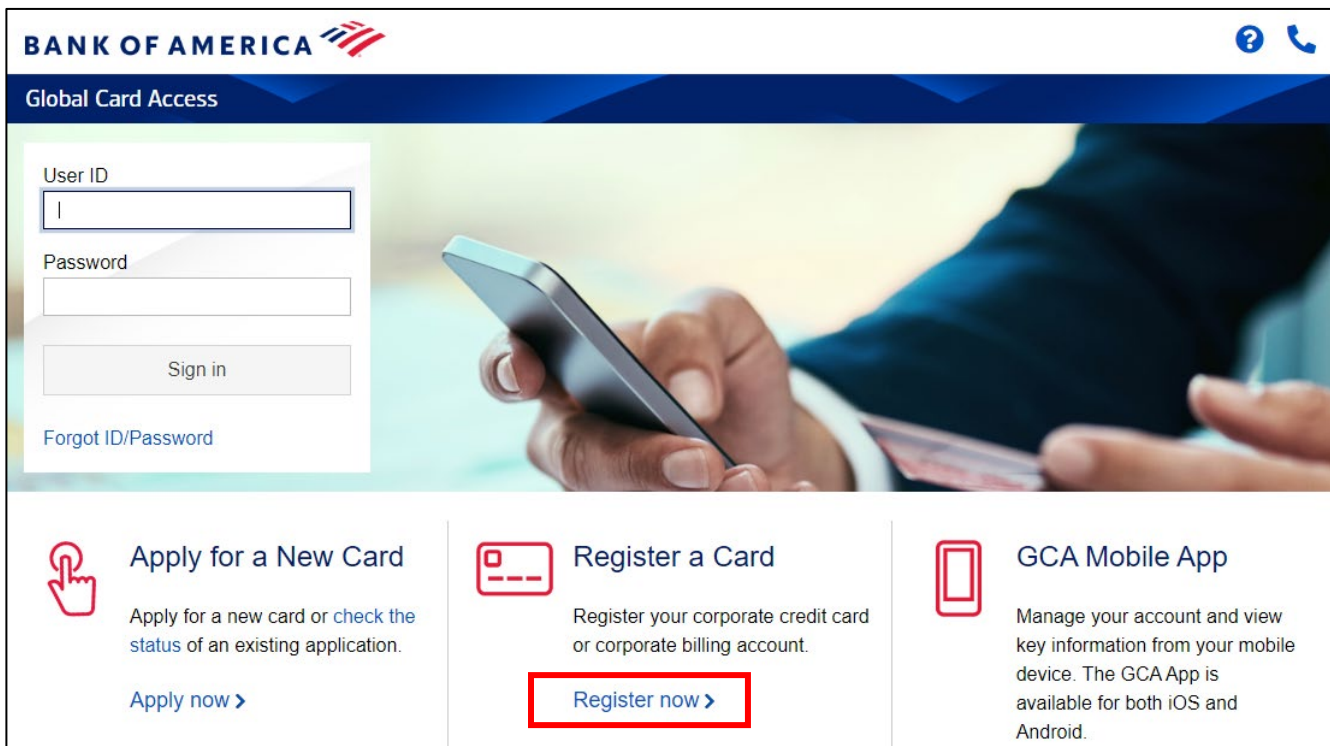
Global Card Access is an online card management tool that gives you and your cardholders access to your corporate card information whenever, wherever and however you need it. As a Program Administrator, you'll be able to view your global account dashboard, manage your cardholders, approve new account requests online, make payments¹, and view your statements. Your cardholders will have access to features such as checking their credit limit, balance, and available credit, along with viewing/changing their PIN, locking card, managing alerts, accessing statements, and making payments² for added convenience and security.

First-time Registration for Corporate Accounts

A Program Administrator who manages a company's North America corporate card program can register for Global Card Access using the company's billing account number. Program Administrators who manage EMEA and APAC corporate accounts should contact Card Digital Services to be registered for Global Card Access. All cardholders, globally, are able to self-register their account on Global Card Access.

To register as a new user for a corporate account, complete the following:

1. Access the Global Card Access website at <https://www.bankofamerica.com/globalcardaccess>.
2. From the Global Card Access sign-in screen, click *Register now*.



BANK OF AMERICA


Global Card Access


User ID


Password

Sign in

[Forgot ID/Password](#)

 **Apply for a New Card**
Apply for a new card or [check the status](#) of an existing application.
[Apply now >](#)

 **Register a Card**
Register your corporate credit card or corporate billing account.
[Register now >](#)

 **GCA Mobile App**
Manage your account and view key information from your mobile device. The GCA App is available for both iOS and Android.

3. Enter your company's billing account number and click *Continue*.

New User Registration

Enter your corporate card number or your company's billing account number.

4. Enter your account information (company name, company number, credit limit, zip/postal code) and click *Continue*.

Important:

- Enter the company name exactly as it appears on your statement.
- Enter your credit limit without dollar signs, commas or decimals.


Verify Your Card


1


2


3

Card Number
471569*****0738

Company Name
 

Company Number
 

Credit Limit
 

ZIP / Postal Code
 

5. Create your user ID, password and answer three security questions. This information will be used to verify your identity. Click *Continue*.
- A user ID must be a minimum of 7 characters and a maximum of 50 characters.
 - A password must be a minimum of 12 characters and a maximum of 100 characters and include alphabetic and numeric characters. Passwords are case sensitive.

Create Your Account

1

2

3

Create a User ID

Create a Password

Confirm Password

Select and answer three security questions. These will be used to verify your identity.

Question 1

Answer 1

Question 2

Answer 2

Question 3

6. Enter your user information (first name, last name, email address) and click *Submit*.

Enter Your Information

1

2

3

First Name

Program

Middle Name

Optional

Last Name

Administrator

Employee ID

Optional

Email Address

programadministrator@bofa.com

Submit

Cancel

7. You will be taken to the Global Card Access page to sign in with the user credentials you just created. You will also receive an email confirming your enrollment.
8. Accept the Terms and Conditions upon next sign-in to complete your registration.

BANK OF AMERICA

Global Card Access

Terms and Conditions

TERMS OF USE FOR BANK OF AMERICA GLOBAL CARD ACCESS WEBSITE

IMPORTANT! PLEASE READ THE FOLLOWING TERMS OF USE CAREFULLY.

By clicking the "Accept" button or Using the Network (as defined below), you:

1. Agree to comply with these terms of use ("Terms of Use") for the Services (as defined below) and GCA Service website (the "Site").

2. Agree that you may use the Service and the Site only if you have been expressly authorized to do so by the Client (as defined below).

3. Acknowledge that you have read all of the terms set out in these Terms of Use (in particular, we draw your attention to the terms set out under "Disclaimer of Warranties and Limitations of Liability" and "General" below).

4. Acknowledge that you are only being provided with the Service and the Site as an authorized user of the Client.

5. Acknowledge that you are not being provided with the Services and the Site either as a consumer or with respect to any of your individual or personal accounts with the Bank (as defined below) or its affiliates.

6. Agree to receive within this Site or through Alerts, the Terms of Use, all updates to the foregoing, and all disclosures, notices, alerts, and other communications regarding the Site.

7. Acknowledge that these Terms of Use will only be provided to you once even if you Use the Site with respect to multiple card accounts, and you agree that you will be deemed to have entered into these Terms of Use separately with respect to each such card account.

8. Agree, if you are resident in Canada, India or Singapore, to the collection, use and disclosure of your personal data and other data processing activities set out in the Privacy Notice for Canada, India and Singapore referenced below.

9. Agree to us communicating with you through the methods of electronic transmission set forth in the terms and conditions below, including through electronic mail (e-mail) and text messaging services.

10. Agree to us to sending communications using an automatic telephone dialing system or an artificial or prerecorded voice system.

You can withdraw your consent to the Terms of Use by calling customer service through the telephone numbers provided in the Contact Us section within the Site. However, withdrawing your consent means you will no longer be able to access or otherwise Use the Site or the Services.

IF YOU DO NOT AGREE TO THE TERMS OF USE, YOU MUST NOT USE THE SITE OR THE NETWORK.

"Bank", "we", "our", or "us" means with respect to cards issued in (i) Australia, Bank of America, National Association acting through its Australia Branch; (ii) Austria, Belgium, Bulgaria, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Sweden, Switzerland, Spain, Turkey, or the United Kingdom, Bank of America Europe Designated Activity Company; (iii) Canada, Bank of America, National Association acting through its Canada Branch; (iii) Hong Kong, Bank of America, National Association acting through its Hong Kong Branch; (iv) India, Bank of America, National Association acting through its Mumbai Branch; (v) Singapore, Bank of America, National Association acting through its Singapore Branch; and (vi) United States, Bank of America, N.A.

"Card Agreement" means a, Card Services Agreement, or Commercial Card agreement, in either case, entered into by Client with the Bank.

"Client" means client that is a legal entity and that has entered into a Card Agreement with the Bank.

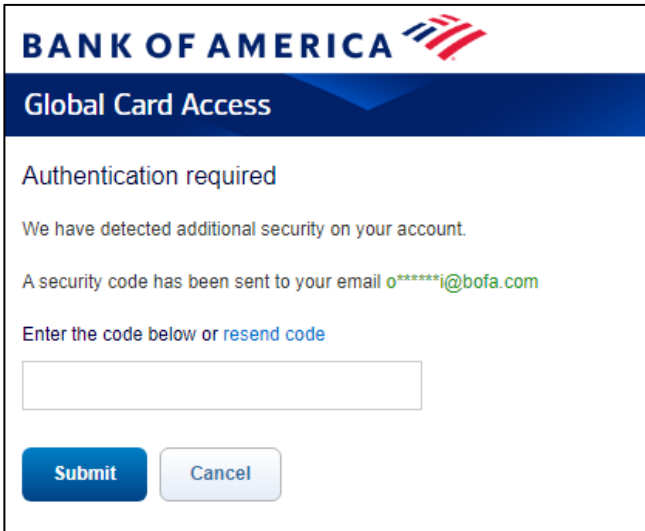
By choosing Accept, you agree to the terms and conditions. Choose Decline to cancel.

Accept

Decline

Signing into Global Card Access

Sign into Global Card Access via the following link: bankofamerica.com/globalcardaccess. After registration, subsequent sign-in to Global Card Access for all users will require additional authentication via a One-Time Passcode (OTP).



BANK OF AMERICA

Global Card Access

Authentication required

We have detected additional security on your account.

A security code has been sent to your email o*****i@bofa.com

Enter the code below or [resend code](#)

Submit **Cancel**

Important:

- The OTP is valid only for the current session and expires within 15 minutes from the time of generation. A new OTP will be required if the current session ends due to inactivity.
- The resend code link allows you to request a new single-use OTP to be resent via email. This will cause any outstanding passcodes previously sent during sign-in to expire. Multiple, consecutive expired or invalid token entries will cause your account to be locked.
- For North America and EMEA users, an email OTP is only presented at first sign-in from a particular device/browser. Users can continue to access Global Card Access from the same device/browser and will not be prompted for an email OTP going forward as this has now become a recognized device.
- APAC users will experience an email OTP upon each sign-in due to regional regulatory requirements.

If you have self-registered for an account, you will use the User ID and Password you created upon registration to sign into Global Card Access.

If you have had your role created for you either by a Program Administrator in your organization or a Bank Servicing user, you will receive an email from Global Card Access containing your User ID and a link to complete registration by setting your password and security questions. You may change your User ID from your profile upon signing into Global Card Access.

Program Administration Dashboard

From the account dashboard, you are able to view the spend details, statements, credit limit, available credit limit, and make payments for your corporate accounts. The following links are also located on the right-side navigation bar and provide quick, easy access to commonly used features:

- My tasks – Notification area of any pending items that require attention (e.g. password expiration or account request key expiration).
- Quick actions – Options listed in this menu vary depending on company configuration and availability per region.
 - Manage account requests – access the account requests awaiting approval and view account request history.
 - Manage users – view a complete list of users tied to your company.
 - View statements – view current and historical corporate statements. An email notification is sent when your statement is available for viewing.
 - Card Rewards (U.S. Only) – eligible accounts can view available Premium Reward points balance and access the rewards site to redeem reward points.
- Related Links
 - Global Reporting and Account Management – opens Global Reporting and Account Management in a new tab or browser window.
 - Works – opens Works in a new tab or browser window.
 - Card Assistant – opens Card Assistant, your commercial card resource center, in a new tab or browser window.

The screenshot displays the Bank of America Program Administration Dashboard. At the top, there are tabs for 'Program Administration' and 'My Accounts'. The main header includes the Bank of America logo and a user profile for 'Duane P'. Below the header, a navigation bar shows 'Global Card Access' and links to 'Home', 'Payments', 'Account Requests', 'Administration', and 'Enrollment Report'.

The main content area is divided into two columns. The left column contains:

- Account Summary:** A dropdown menu for 'Account ending 2043'. Below it, a table shows:

| Current balance | Available credit | Credit limit |
|-----------------|------------------|--------------|
| 69,723.80 | 4,927,976.20 | 5,001,200.00 |
- Statements:** Tabs for 'Corporate statements' and 'Cardholder statements'. A dropdown for the year '2023' is shown. Below is a list of statement dates: November 01, 2023; October 26, 2023; September 26, 2023; September 11, 2023; September 08, 2023; and September 01, 2023. Each date has a download icon.

The right column contains a sidebar with the following sections:

- My tasks:** 'No tasks at this time.'
- Quick actions:**
 - Manage account requests
 - Manage users
 - View statements
- Related links:**
 - Global Reporting and Account Management
 - Works
 - Card Assistant

User Management

As a Program Administrator, you can view, create, edit, and deactivate users, as well as reset their passwords.

Viewing Users

1. Go to *Administration* → *Users* from the top of the Program Administration Dashboard or *Manage users* from the Quick actions menu.
2. This will show you a view of all the users within your scope that are registered for Global Card Access, along with their role type.

Creating a User

1. Go to *Administration* → *Users* from the top of the Program Administration Dashboard or *Manage users* from the Quick actions menu.
2. Click *Create* from the top right-hand corner.
3. Select *Create User*.
4. Enter the user details: Name, User ID, Employee ID (optional), and Email Address.
 - A user ID must be a minimum of 7 characters and a maximum of 50 characters.
 - You may customize the field label from Employee ID to your preferred internal identifier (e.g. Person Number). Refer to the Customize Applications section for more information.
5. Click *Save and continue*.

The screenshot shows the 'Create new user' form in the Bank of America system. The form is titled 'Create new user' and is part of the 'Administration' section. It shows the '1. Enter user details' step. The form fields are: First name (Alec), Middle name (optional), Last name (Smith), User ID (alec_smith), Email address (customermail@works.com), and Employee ID (optional). There are 'Save and continue' and 'Cancel' buttons at the bottom.

6. Assign the desired roles to the new user. Role options are:
 - Program Administrator: User will have full administrative permission over the selected billing accounts.
 - i. Click *Add accounts* to assign accounts the user will be a Program Administrator for.
 - ii. Select the radio button for the type of Program Administrator you would like to create.
 1. Selecting *All accounts (Global)* will give the user the Global Program Administrator role, where they will have administrative privileges over all of your company's existing billing accounts, as well as any future billing accounts.
Note: This option may not be available based on your company's configuration.
 2. Selecting *Select accounts (Scoped)* will give the user the Scoped Program Administrator role, where they will have administrative privileges over a subset of your company's billing accounts. Use the radio buttons to designate these specific accounts.

3. Selecting *None* removes the Program Administrator role from the user.
 - iii. Once you've made your selection, click *Add*.
 - Auditor: User will have read-only permissions on the selected billing accounts.
 - i. Click *Add accounts* to assign accounts the user will be an Auditor for.
 - ii. Select the radio button for the type of Auditor you would like to create.
 1. Selecting *All accounts (Global)* will give the user the Global Auditor role, where they will have read-only permissions over all of your company's billing accounts, as well as any future billing accounts.





Note: This option may not be available based on your company's configuration.
 2. Selecting *Select accounts (Scoped)* will give the user the Scoped Auditor role, where they will have read-only permissions over a subset of your company's billing accounts. Use the radio buttons to designate these specific accounts.
 3. Selecting *None* removes the Auditor role from the user.
- Important:* A user cannot be a Program Administrator and an Auditor for the same billing account.
- Account Request Approver: If applicable to your program, the user will be able to approve online account request applications.
 - i. Click *Add approval groups* to add the groups that this user should approve applications for.
- Cardholder: This user is assigned to another cardholder's card account in order to perform functions on their behalf, such as setting up alerts, checking statements, etc. This role is often assigned to Executive Assistants to perform functions for their manager's card.
 - i. Click *Add accounts* to add accounts the user will have certain permissions over.
7. Once you complete the role assignment, click *Finish*. The user will receive a welcome email from Global Card Access with their user ID and steps for completing their registration.

Editing User Details

1. Go to *Administration* → *Users* from the top of the Program Administration Dashboard or *Manage users* from the Quick actions menu.
2. Click the desired user's name and select *View Full Details*.

Administration / Users

Users Create Clear Filters

| User ID | Name | Program Administrator (Global) | Program Administrator (Scoped) | Group Approver | Cardholder | Proxy User | Global Auditor | Scoped Auditor | GRAM | Locked | Email Address | Last Login Date |
|---------------------|--|--------------------------------|--------------------------------|----------------|------------|------------|----------------|----------------|------|----------|------------------------------|----------------------|
| romainvyls | Wyts, Romain | | | | X | | | | | Unlocked | customermail@works.com | 2021-01-06 12:10 CST |
| cardholder2520 | 2520, card | | | | X | | | | | Unlocked | medikonda.keerthi@bofa.com | 2021-08-18 07:43 CDT |
| msEmailRegistration | 2520, mari | | | | X | | | | | Unlocked | msspencer@bofa.com | |
| number_2520 |  View Full Details | | | | X | | | | | Unlocked | mutheswari.muthuraj@bofa.com | 2021-11-15 06:41 CST |
| |  Reset Password | | | | X | | | | | Unlocked | mutheswari.muthuraj@bofa.com | 2021-11-15 06:41 CST |
| |  Resend Welcome Email | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-30 09:22 CDT |
| |  Deactivate User | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-03 16:13 CDT |
| mari2520B | | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-30 09:22 CDT |
| ms2520cpv2.4533 | | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-03 16:13 CDT |

3. Edit the available fields as desired and click *Save*.
 - A user ID must be a minimum of 7 characters and a maximum of 50 characters.
 - Suppress awaiting approval email – selecting this checkbox provides the ability for the user to opt out of receiving an email each time an account request is submitted by an applicant.
 - Do not include my name or email address in emails to applicant – selecting this checkbox suppresses the user's name and email address in emails to applicants.

Deactivating a User

1. Go to *Administration* → *Users* from the top of the Program Administration Dashboard or *Manage users* from the Quick actions menu.
2. Click the desired user's name and select *Deactivate User*.
3. Click *Ok*. The user will no longer be able to sign in to Global Card Access.

Resetting a Password

1. Go to *Administration* → *Users* from the top of the Program Administration Dashboard or *Manage users* from the Quick actions menu.
2. Click the desired user's name and select *Reset Password*.
3. Click *Ok*. The user will be sent an email providing further instructions on how they can successfully reset their password.

Resend Welcome Email


1. Go to *Administration* → *Users* from the top of the Program Administration Dashboard or *Manage users* from the Quick actions menu.
2. Click the desired user's name and select *Resend Welcome Email*.
3. Click *Ok*. The user will be sent an email providing further instructions on how they can successfully reset their password and security questions.

Corporate Account Maintenance

1. Go to *Administration* → *Corporate Accounts* from the top of the Program Administration Dashboard.
2. Click the account you would like to edit and select *View Full Details*.

Administration / Corporate Accounts QL Test Company

Corporate Accounts Clear Filters

| Account name | Account last 4 | TSYS account ID | TSYS company number | Region | Eligible for account requests | Eligible for alerts |
|---|----------------|-----------------|---------------------|--------|-------------------------------|---------------------|
| APAC AUD CC 1500000 | 0766 | 80000001108 | 1500000 | APAC | X | |
|  View Full Details | 7759 | 80000014047 | 5800044 | EMEA | X | |

3. Edit the fields as desired and click *Save*.
 - Embossed Name 2 is the default value that will display on cards that are issued to new applicants; this is usually the company name.
 - Suppressing the accounting code will hide the Accounting Code field to Program Administrators on online account requests.
 - Select the approval method for account requests. Selecting Additional Approval – Online will enable the ability to set up Approval Groups and Approval Panels to review and approve online account requests in addition to Program Administrator approval.

Program Administration My Accounts

BANK OF AMERICA Olga Terezi

Global Card Access

Home Account Requests Administration

Administration / Corporate Accounts / Corporate Account Details

EXPERIAN FILE TEST34

| | |
|------------------------------------|--|
| Account Name: EXPERIAN FILE TEST34 | Embossed Name 2 Default: EXPERIAN FILE TEST34 (1 - 21) |
| Account Last 4: 1086 | Suppress Accounting Code: <input type="radio"/> Yes <input checked="" type="radio"/> No |
| TSYS Company Number: 6600067 | Approval Method: Additional Approval - Online |
| HL1: 6600067 | Allow Cash: <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Region: US/Canada | Delivery Options: <input type="checkbox"/> Standard Post to the cardholder at the primary mailing address (5-10 business days) |
| Currency: U.S. DOLLAR | <input type="checkbox"/> Overnight/urgent delivery to the cardholder at the primary mailing address (A fee may apply.) |
| Enrolled in Alerts: No | <input type="checkbox"/> Ship to the Program Administrator using the company bulk ship address (2-6 business days) |
| | Save |

4. To add a corporate account, select *Add* from the bottom left-hand side of the Corporate Accounts screen (North America accounts only). The New Card Registration page will appear.

Online Account Request Management

Global Card Access allows your employees to apply for new card accounts online. You must provide your employees with an Account Request Key which you generate in order for online card applications to be successfully submitted. As a Program Administrator, you'll be able to create and manage Account Request Keys and review and approve new account requests. Your company must be configured for this feature.

Creating Account Request Keys (Video tutorial)

Your employees will use Account Request Keys to request accounts online. Each Account Request Key has specific settings that govern how an employee's account is set up and managed, such as the Corporate Account to which an account will be linked to, and the type of card the applicant will receive upon approval.

Note: Once an account has been requested for a particular Corporate Account or product type, it cannot be changed. If the applicant has submitted a request using an incorrect Account Request Key for the account intended, they must submit a new application.

1. Go to *Account Requests > Key Management* from the top of the Program Administration Dashboard.
2. Click the *Create* dropdown from the top right-hand corner and select *Create Account Request Keys*.

| Global Card Access | | | | | | | | | | | |
|--|---|----------------|-----------|-----------------------------|-------------------------------|-----------------------|--------------------|----------------------|------------|-----------------|------------------------|
| Home Account Requests Administration Bank User | | | | | | | | | | | |
| / Account Requests / Key Management | | | | | | | | | | | |
| Account Request Keys | | | | | | | | | | | Create ▼ |
| <div> <div>>></div> <div>Create Account Request Keys</div> </div> | | | | | | | | | | | |
| Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses |
| <input type="checkbox"/> | | | All ▼ | | | | | | | | |
| <input type="checkbox"/> Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-jx4-5zj | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a |
| <input type="checkbox"/> Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | lo0-0nm-5x4 | Alerts | PA Approval Only | | | 2020-12-16 | 2020-12-19 | 5 |
| <input type="checkbox"/> Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67j-q8l | MK | Single Group Approval | Group | 1,500.00 | 2020-09-22 | 2022-09-22 | 100 |
| <input type="checkbox"/> Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | MCHIP ADV AUD TRVL - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |
| <input type="checkbox"/> Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | EMEA key | PA Approval Only | | 2,500.00 | 2020-07-22 | 2022-07-22 | n/a |
| <input type="checkbox"/> Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-gu0 | MCHIP ADV SEK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |

Note: If multiple corporate accounts exist, the *Select Corporate Account(s)* window displays. Select a corporate account and click *OK*.

3. Complete the *Create Account Request Key(s)* page.
 - a. Configure your Account Request Key in the *Settings* section.
 - i. *Key Nickname* gives you the option to name the key with a user-friendly name.
 - ii. Fields under *Expiration Date* are optional and provide you with alerts when keys are near expiration.
 - b. Select any of the optional *Account Request Options*.

- i. Selecting *Display Employee ID* requires you to set a minimum and maximum length for the Employee ID field. You can also indicate if the Employee ID is required when an account request is submitted.
 - ii. Selecting the *Suppress emails* option withholds any account request-related emails from being sent to applicants.
 - iii. Selecting the *Suppress Desired Credit Limit* option hides this field from applicants completing an online account request.
 - iv. Entering an amount in the *Default Credit Limit* field causes the Credit Limit amount to default on the Account Request form for Program Administrators. You may still edit the Credit Limit amount prior to approving a request, as needed.
 - v. Selecting *Require Manager Information* indicates that a Manager Name is required when an account request is submitted.
- c. Select one of the *Approval Method Options*.
- i. Selecting *PA Approval Only* routes account requests directly to the Program Administrator for approval.
 - ii. Selecting *Single Group Approval* routes account requests to members of the selected Approval Group first for approval before routing to the Program Administrator. Click the search tool to select the name of an Approval Group.
 - iii. Selecting *Panel Approval* routes account requests to the Approval Groups in the order designated on the Panel before routing to the Program Administrator. Click the search tool to select the name of an Approval Panel.
4. Click *Save*.

Create Account Request Key(s)

* Corporate Account:

Settings

* Number of Keys: (1 - 100)

Key Nickname:

A sequence number will be added to the key nickname when more than one key is requested.

* Start Date:

* Expiration Date:

☐ Limit number of uses to (1 - 10,000)

☐ Send key expiration reminder days before expiration

Account Request Options

☐ Display Employee ID
 ☐ Suppress emails to applicants
 ☐ Suppress Desired Credit Limit from applicants

Default Credit Limit: (1234.00)

☐ Require Manager Information

Approval Method Options

Approval Options:

Disabling or Editing Account Request Keys

1. Go to *Account Requests > Key Management* from the top of the Program Administration Dashboard.
2. To disable an Account Request Key, select the Account Request Key you wish to disable, click *Disable*, then click *OK*.

| Account Request Keys Create | | | | | | | | | | | | |
|--|--------|-------------------------|----------------|-----------|---------------------|------------------------------|-----------------------|--------------------|----------------------|------------|-----------------|------------------------|
| Clear Filters | | | | | | | | | | | | |
| | Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses |
| <input checked="" type="checkbox"/> | Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-ix4-5zj | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | io0-0nm-5x4 | Alada | PA Approval Only | | | 2020-12-16 | 2022-12-19 | 5 |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | kg6-ir5-177 | | Only | | | 2020-12-16 | 2022-12-16 | n/a |
| <input type="checkbox"/> | Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67l-q8l | | Approval Group | 1,500.00 | | 2020-09-22 | 2022-09-22 | 100 |
| <input type="checkbox"/> | Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | | Only | | | 2020-11-05 | 2022-11-05 | n/a |
| <input type="checkbox"/> | Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | | Only | 2,500.00 | | 2020-07-22 | 2022-07-22 | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-gu0 | MCHIP ADV SEK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV DKK COM | 6101 | EMEA | e7v-r4f-i1q | MCHIP ADV DKK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 2f2-062-u4w | BROADCOM 5800044 NOK CC | PA Approval Only | 100.00 | | 2020-08-13 | 2022-08-13 | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 09o-b9e-f6s | | Single Group Approval | test | | 2020-10-01 | 2022-10-01 | n/a |

1 Selected | 41 items

Show 10 per page

Page: 1 of 5

Disable

Download

3. To edit an Account Request Key, select the desired Account Request Key, edit the parameters as needed, and click *Save*.

Manage Approvers

As part of your online account request configuration, you can designate Approval Groups or Panels. Using Approval Groups and Panels enables your organization to require additional approvals for online account requests. Using a single Group Approval requires the approval of one approver from the designated Approval Group. Once approved, the request is routed to the Program Administrator for final approval. Using Approval Panels requires the approval by one approver from each of the Approval Groups that are members of the Approval Panel. A maximum of two Approval Groups can be assigned to a panel. An Approval Panel uses a set approval order, which can be edited by the Program Administrator.

Creating Approval Groups

1. Go to *Administration > Manage Approvers* from the top of the Program Administration Dashboard.
2. Click the *Create* dropdown from the top right-hand corner and select *Create Approval Group*.
3. Enter an Approval Group Name and Description (optional), and click *Save*.
4. The *Select User(s)* window displays. Select the checkbox next to each user to be added and click *OK*.

Global Card Access
[Home](#) [Account Requests](#)
[/ Administration / Manage Appr](#)

Test 3

* Name:

Approvers

Panels

☐

Name

0 Selected | 0 items

Remove Selected

Add Approver(s)

Select User(s)

Clear Filters

| | Last Name | First Name | User ID | Email Address |
|-------------------------------------|----------------------------|------------------------------|-----------------|---------------------------------|
| <input type="checkbox"/> | a<script>alert(1)</script> | a'><script>alert(3)</script> | qwerqwer | michael.ayer@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Priya | priya_grp | priyadharshini.sukumar@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Anusha | Anusha.Approver | anusha.kantu@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Friday | FridayApp | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr2 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr30 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | ApproverTest | Group | Group Approver | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Test | Test.Auditor | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Approver | ApprAud | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Auditor | Global | Global.Auditor1 | anusha.kantu@bofa.com |

3 Selected | 51 items
Show 10 per page
Page: 1 of 6

OK

Cancel

QL Test Company

Clear Filters

Last Login Date

Page: 1 of 0

- Click the *Keys* tab to assign Account Request Keys to the group.
- Click *Add Key(s)* and click the checkbox next to each Account Request Key you would like to add.
- Click *OK*.

Select Account Request Key(s) Clear Filters

| | Account Request Key | Key Nickname | Corporate Account | Account Last 4 | Region | Status |
|-------------------------------------|---------------------|-------------------------|-------------------------|----------------|-----------|--------|
| <input checked="" type="checkbox"/> | 2f2-o62-u4w | BROADCOM 5800044 NOK CC | BROADCOM 5800044 NOK CC | 7759 | EMEA | Active |
| <input type="checkbox"/> | kq6-ir5-177 | | EXPERIAN FILE TEST34 | 1086 | US/Canada | Active |

1 Selected | 2 items Show 10 per page Page: 1 of 1 OK Cancel

Editing Approval Groups

- Go to *Administration > Manage Approvers* from the top of the Program Administration Dashboard.
- Click a particular Group Name.
- To remove an approver, select the checkbox next to the Approver's name, click *Remove Selected* and click *OK*.
- To remove Account Request Keys, click the *Keys* tab, select the checkbox next to each Account Request Key to be removed, click *Remove* and click *OK*.
- To edit a Group Name or Description, edit the text in the *Name* and *Description* field and click *Save*.
- To download Approval Group information, select the checkbox for each group, click *Download*, select a format option, and follow the prompts to Save or Open the file.
- To delete an Approval Group, select the checkbox for the group name to be deleted, and click *Delete*, followed by *OK*.

Note: Upon deletion, account requests will be routed to the Program Administrator(s).

Creating Approval Panels

1. Go to *Administration > Manage Approvers* from the top of the Program Administration Dashboard.
2. Click the *Create* dropdown from the top right-hand side corner and select *Create Approval Panel*.
3. Enter an Approval Panel Name and Description (optional) and click *Save*.
4. Click *Add Approval Group* to add groups to the panel.

Note: A maximum of two Approval Groups can be assigned to a panel.

Home Account Requests Administration

/ Administration / Manage Approvers / Groups and Panels / Panel Details

Panel 3

* Name:

Description:

Approval Groups

| Approval Order | Name | Description |
|--|------|-------------|
| There are no approval groups assigned to this panel. | | |

[+ Add Approval Group](#)

[Save](#)

5. Click *Save*.
8. Click *Add Keys* in the Assigned Keys section and click the checkbox next to each Account Request Key you would like to add.
6. Click *OK*.

Editing Approval Panels


1. Go to *Administration > Manage Approvers* from the top of the Program Administration Dashboard.
2. Click the *Panels* tab, then select the specific panel name you would like to edit.
3. To remove an approval group, click the X next to the approval group name and click *Save*.
4. To change the order of the approval groups, click the Approval Order dropdown, select a number option for each group, and click *Save*.
5. To add an Account Request Key, click *Add Key(s)*. Select the checkbox for each Account Request Key to be added to the panel and click *OK*.
6. To remove an Account Request Key, select the checkbox for each Account Request Key to be removed, click *Remove*, and click *OK*.
7. To edit a Panel Name or Description, edit the text in the *Name* and *Description* fields as needed and click *Save*.
8. To download Approval Panel information, select the checkbox for each panel, click *Download*, select a format option, and follow the prompts to Save or Open the file.
9. To delete an Approval Panel, select the checkbox for the panel name to be deleted, and click *Delete*, followed by *OK*.

Note: Upon deletion, account requests will be routed to the Program Administrator(s).

Completing and Approving Account Requests (Video tutorial)

1. Go to *Account Requests > Approvals – Program Administrator* from the top of the Program Administration Dashboard or *Manage account requests* from the Quick actions menu.

[Home](#)
[Account Requests](#)
[Administration](#)

 / [Account Requests](#) / [Approvals - Program Administrator](#)

Account Requests - Program Administrator

Awaiting Approval

Submitted Requests

Completed Requests

Errors 1

Clear Filters

| | Applicant | Embossed Name 1 | Corporate Account | Submitted | Account Request Key | Account Request ID |
|-----------------------|--------------------|-----------------|---|----------------------|-----------------------------|--------------------|
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:29 CST | 7j1-67j-q8l | 244624 |
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:28 CST | 7j1-67j-q8l | 244623 |
| <input type="radio"/> | Smith, Joey | JOEY SMITH | WORKS 8594079 T JOHNSON | 2020-12-09 17:48 CST | ra1-ij1-6ux | 244613 |
| <input type="radio"/> | sample, test | TESTING | WORKS TEST CC 8705504 | 2020-11-16 00:49 CST | 7j1-67j-q8l | 244572 |
| <input type="radio"/> | Corner, Lex | TOKENTEST | MCHIP ADV CHF.COM | 2020-11-11 07:22 CST | yo2-oo9-jt9 | 244571 |

2. Select the radio button next to the desired account request and click on *Complete & Approve*.
3. Verify the card application information and edit any account details, as needed.

Note: You must verify the correct address has been entered to ensure successful card delivery.

4. Once your review and/or edits are complete, click on *Approve* to approve the application or *Reject* to reject the application.

Note:

- Applicants are sent an email to confirm approval or rejection of the account request, unless the Account Request Key has been set to *Suppress emails to applicants*.
- If the account request is rejected, the employee must create a new account request if one is needed.
- As a Program Administrator, you may bypass a particular application that requires Group Approval by going to the *Submitted Requests* tab, clicking the checkbox next to the applicant, and clicking *Bypass*. You will have to provide a comment to provide justification for bypassing.

Handling Account Request Errors (U.S. only)

For U.S. programs, Program Administrators may resolve address errors identified with account requests. Address errors consist of mismatches between the state and postal code provided in an account request. This functionality is only available for US programs.

1. Go to *Account Requests > Approvals – Program Administrator* from the top of the Program Administration Dashboard or *Manage account requests* from the Quick actions menu.
2. Click on the *Errors* tab.

Note: A number displays on the *Errors* tab when account request address errors have been identified.

3. Select the radio button next to the desired applicant.
4. Click *Correct & Resubmit*.

Home Account Requests Administration

/ Account Requests / Approvals - Program Administrator

Account Requests - Program Administrator

Awaiting Approval Submitted Requests Completed Requests **Errors 1** [Clear Filters](#)

| | Applicant | Error | Embossed Name 1 | Errors Account | Submitted | Account Request Key | Account Request ID | Approved By | Approved Date |
|----------------------------------|-------------------|----------------------|------------------|---------------------------------------|----------------------|-----------------------------|--------------------|-------------|----------------------|
| <input checked="" type="radio"/> | Creation, Request | View | REQUEST CREATION | WORKS TEST CC 8705504 | 2020-11-11 06:25 CST | 711-671-981 | 244570 | GPA, Anusha | 2020-11-11 06:26 CST |

1 Selected | 1 item Show 10 per page Page: 1 of 1

[Reject](#) [Correct & Resubmit](#)

5. Edit the State and/or Postal Code within the Address section as needed.
6. Click *Resubmit*. The application will then move from the *Errors* queue to the *Completed Requests* queue.

Viewing and Downloading Completed Account Requests

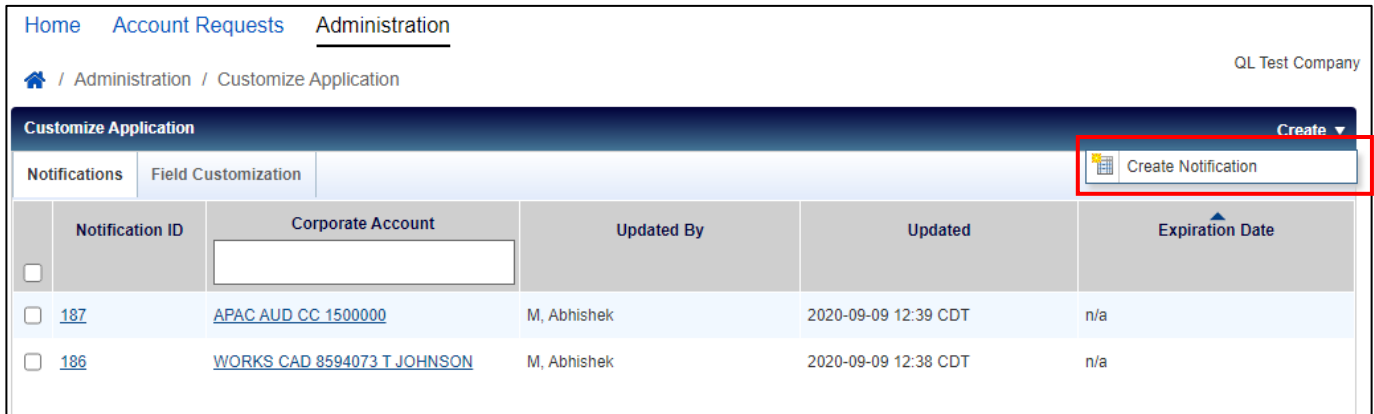
1. Go to *Account Requests > Approvals – Program Administrator* from the top of the Program Administration Dashboard or *Manage account requests* from the Quick actions menu.
2. Click on the *Completed Requests* tab.
3. Select the applicant whose application you would like to view and click *View Full Details*.
4. Select the checkbox next to each account request that you would like to download.
5. Click Download.
6. Select the download format and follow the prompts to Save or Open the file.

Customize Applications

You may customize card applications by either adding a notification that will display to applicants at the top of the account request form or by customizing the internal identifier asked of applicants during the online card application process.

Notifications

1. Go to *Administration* → *Customize Application* from the top of the Program Administration Dashboard.
2. If you have previously set up any notifications, you will see them listed in this view. If you would like to add a new notification, click the *Create* dropdown from the top right-hand corner.
3. Click *Create Notification*.



Home Account Requests Administration

QL Test Company

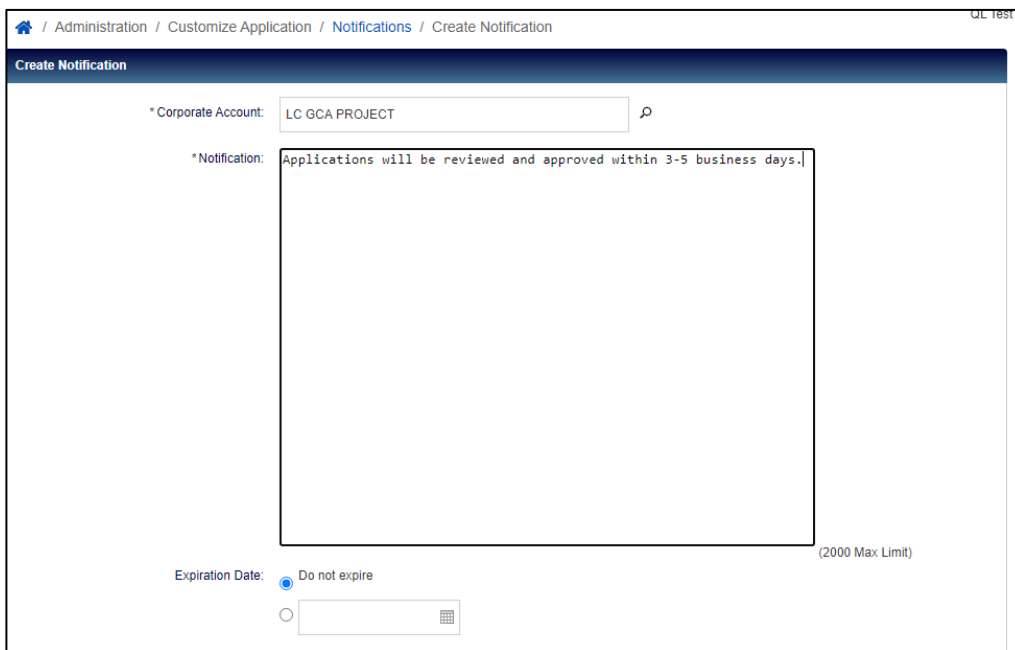
/ Administration / Customize Application

Customize Application Create

Notifications Field Customization

| | Notification ID | Corporate Account | Updated By | Updated | Expiration Date |
|--------------------------|---------------------|---|-------------|----------------------|-----------------|
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | 187 | APAC AUD CC 1500000 | M, Abhishek | 2020-09-09 12:39 CDT | n/a |
| <input type="checkbox"/> | 186 | WORKS CAD 8594073 T JOHNSON | M, Abhishek | 2020-09-09 12:38 CDT | n/a |

4. If you have scope over multiple corporate accounts, you will need to select which corporate account you would like to add the notification to. After selecting the corporate account, click *Ok*.
5. Enter your desired notification text in the *Notification* text box and select an expiration date for the message (optional).



/ Administration / Customize Application / Notifications / Create Notification

QL Test C

Create Notification

* Corporate Account: LC GCA PROJECT

* Notification: Applications will be reviewed and approved within 3-5 business days.

Expiration Date: ☒ Do not expire ☐

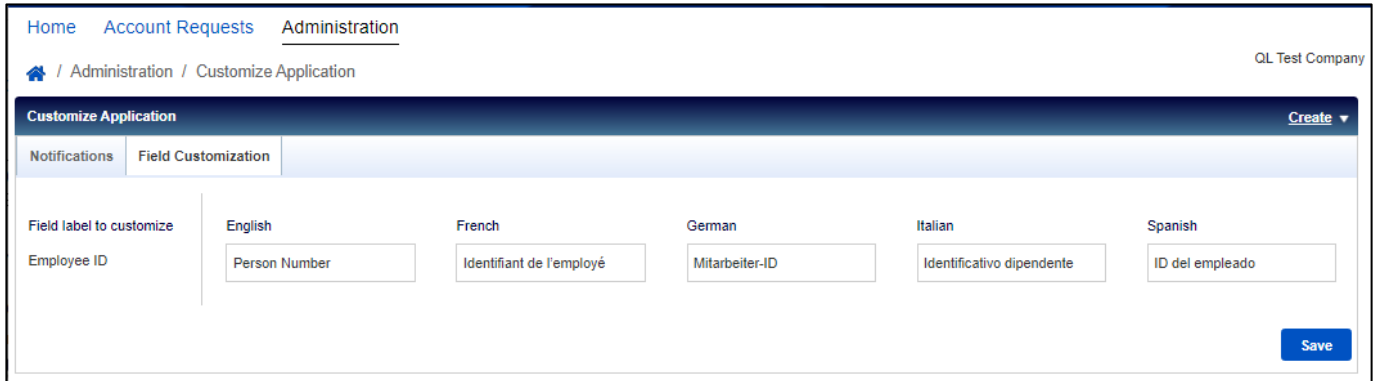
(2000 Max Limit)

6. Click *Save*.
7. You may edit notifications that you create at any time by clicking the *Notification ID*. To delete a notification, click the checkbox next to the Notification ID and click *Expire Now*, then click *Ok*.

Field Customization

1. Go to *Administration* → *Customize Application* from the top of the Program Administration Dashboard.
2. Click on the *Field Customization* tab.
3. The standard employee identifier field for card applications is the Employee ID. If you would like to change the label of this field to some other type of internal identifier, enter the new label you would like to display to applicants on the online card applications in the *English* text box.

Note: The Employee ID field label can be up to 30 characters.



| Field label to customize | English | French | German | Italian | Spanish |
|--------------------------|---------------|--------------------------|----------------|---------------------------|-----------------|
| Employee ID | Person Number | Identifiant de l'employé | Mitarbeiter-ID | Identificativo dipendente | ID del empleado |

Save

4. Enter the translated value of the new field label in French, German, Italian, and Spanish.
5. Click *Save*.

User Enrollment Report

Program Administrators can view which individual users are or are not registered for Global Card Access.

1. Go to *Enrollment Report* from the top of the Program Administration Dashboard.
2. The Enrollment Report displays with all card accounts that are within your scope.
 - a. A filter is available above each column to help you more easily search.
 - b. To filter based on particular corporate account(s), use the Advanced Filter on the left-hand side.
 - c. If the cardholder hasn't registered their card in Global Card Access, the User Name will appear as "No associated user".

Program Administration

My Accounts

BANK OF AMERICA

srijani gp

Global Card Access

Home

Account Requests

Administration

Enrollment Report

Enrollment Report

cc

Clear Filters

Advanced Filter

<

3. To download the Enrollment Report, select the checkbox for each account you would like to display in the report and click Download.
4. Select the download format and follow the prompts to Save or Open the file.

My Account

Global Card Access allows Administrators to access their own individual card accounts via the My Accounts tab.

Program Administration My Accounts

BANK OF AMERICA

Chris Test

Global Card Access

Home Administration Enrollment Report

Account Summary Balances as of Oct 25, 2022, 10:32 AM CDT

US LC CERT CORP - 1717

| | | | |
|---------------------------|-----------------|--------------|------------------|
| Payment due date | Current balance | Credit limit | Available credit |
| Jan 27, 2023 | 195.00 | 60.00 | 0.00 |
| Balance on last statement | Last payment | | |
| 195.00 | 9.23 | | |

My tasks

No tasks at this time.

Quick actions

Manage users

View statements

Make a payment

Card rewards

Redeem reward points

Reward points

10,346 pts

- To add an account to your existing Global Card Access profile, merge multiple accounts in Global Card Access, or edit your profile in Global Card Access, refer to [How to manage your account in Global Card Access](#)
- To view your PIN, refer to [How to use your Chip and PIN card](#)
- To change your PIN, refer to [How to change your PIN in Global Card Access](#)
- To set up alerts, refer to [How to set up alerts in Global Card Access](#)
- To view your statements, refer to [How to view your statement in Global Card Access](#)
- To lock/unlock your card, refer to [How to lock and unlock your card in Global Card Access](#)
- To make a payment, refer to [Cardholder payment instructions](#) (North America only)
- To learn more about Strong Customer Authentication (SCA), refer to the [SCA website](#) (EMEA only)
- For more information about account support, available reward types, and points usage, refer to [Premium Rewards FAQ](#) (U.S. only)

Global Card Access (Español)

Guía del usuario global: administradores del programa

Contenido

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| Inicie sesión en Global Card Access | 6 |
| Panel de administración de programas | 7 |
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Introducción

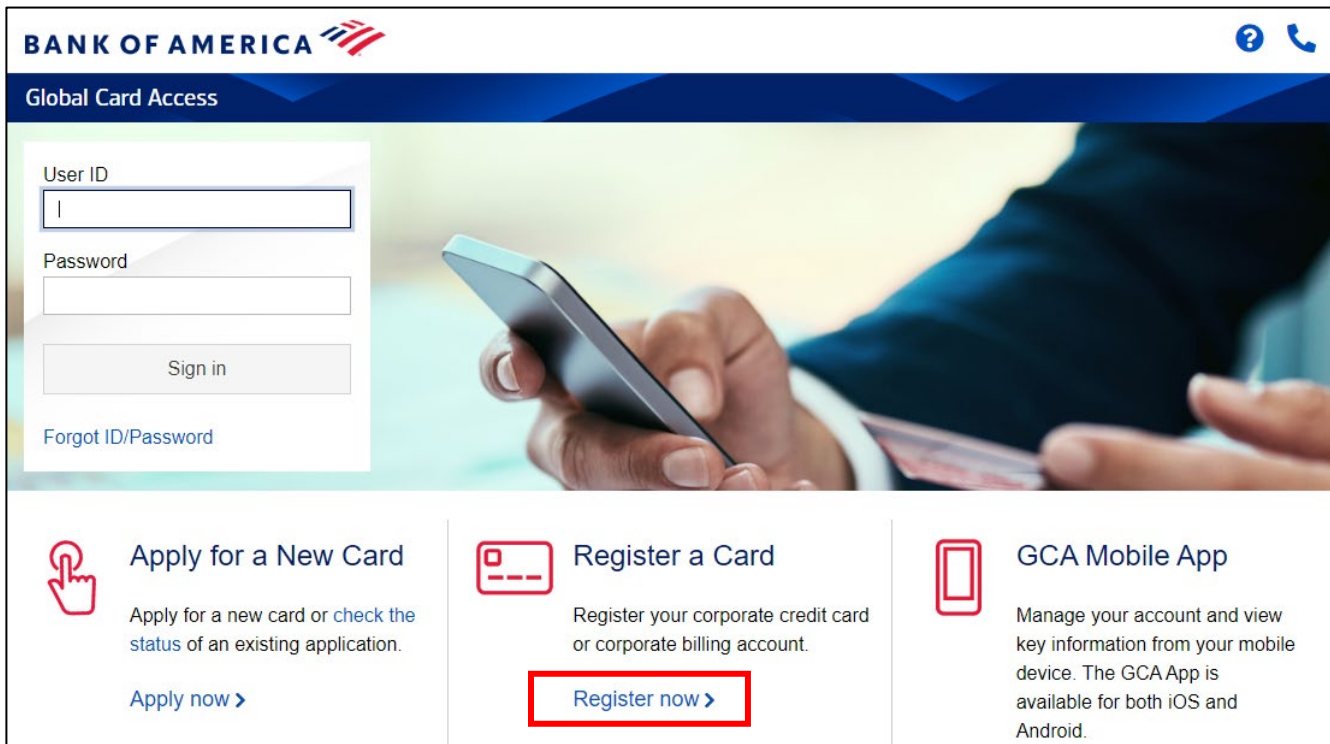
Global Card Access es una herramienta de gestión de tarjetas en línea que le da acceso a la información de su tarjeta cuando, donde y como la necesite. Como administrador del programa, podrá ver el panel de control de su cuenta global, administrar a sus titulares de tarjeta, aprobar solicitudes de cuentas nuevas por Internet, realizar pagos¹ y ver sus extractos de cuenta. Sus titulares de tarjeta tendrán acceso a características tales como verificar su límite de crédito, saldo y crédito disponible, así como ver o cambiar su PIN, bloquear tarjeta, administrar alertas, acceder a extractos de cuenta y realizar pagos² para mayor comodidad y seguridad.

Registro por primera vez para cuentas corporativas

Un administrador del programa que gestiona el programa de tarjetas corporativas de Norteamérica de una empresa puede registrarse en Global Card Access utilizando el número de cuenta de facturación de la empresa. Los administradores del programa que gestionen cuentas corporativas de EMEA y APAC deben ponerse en contacto con Card Digital Services para registrarse en Global Card Access. Todos los titulares de tarjetas, en todo el mundo, pueden registrar su cuenta en Global Card Access.

Para registrarse como usuario nuevo de una cuenta corporativa, deberá realizar los siguientes pasos:

1. Acceda a la web de Global Card Access en <https://www.bankofamerica.com/globalcardaccess>.
2. Desde la pantalla de inicio de sesión de Global Card Access, haga clic en *Register now* (*Registrarse ahora*)



BANK OF AMERICA


Global Card Access


User ID
|


Password

Sign in

[Forgot ID/Password](#)

 **Apply for a New Card**
Apply for a new card or [check the status](#) of an existing application.
[Apply now >](#)

 **Register a Card**
Register your corporate credit card or corporate billing account.
[Register now >](#)

 **GCA Mobile App**
Manage your account and view key information from your mobile device. The GCA App is available for both iOS and Android.

3. Introduzca el número de cuenta de facturación de su empresa y haga clic en *Continue* (Continuar).

New User Registration

Enter your corporate card number or your company's billing account number.

4. Introduzca la información de su cuenta (nombre de la empresa, número de la empresa, límite de crédito, código postal) y haga clic en *Continue*.

Importante:

- Introduzca el nombre de la empresa exactamente como aparece en su extracto bancario.
- Ingrese su límite de crédito sin signos de dólar, comas ni decimales.

Verify Your Card

1

2

3

Card Number
471569*****0738

Company Name
 ?

Company Number
 ?

Credit Limit
 ?

ZIP / Postal Code
 ?

5. Cree su ID de usuario y contraseña y responda a tres preguntas de seguridad. Esta información se utilizará para verificar su identidad. Haga clic en *Continue* (Continuar).
- El ID de usuario deberá tener un mínimo de siete caracteres y un máximo de 50.
 - La contraseña deberá tener un mínimo de 12 caracteres y un máximo de 100 e incluir caracteres alfanuméricos. Para las contraseñas, se diferencia entre mayúsculas y minúsculas.

Create Your Account

1

2

3

Create a User ID

Create a Password

Confirm Password

Select and answer three security questions. These will be used to verify your identity.

Question 1

Answer 1

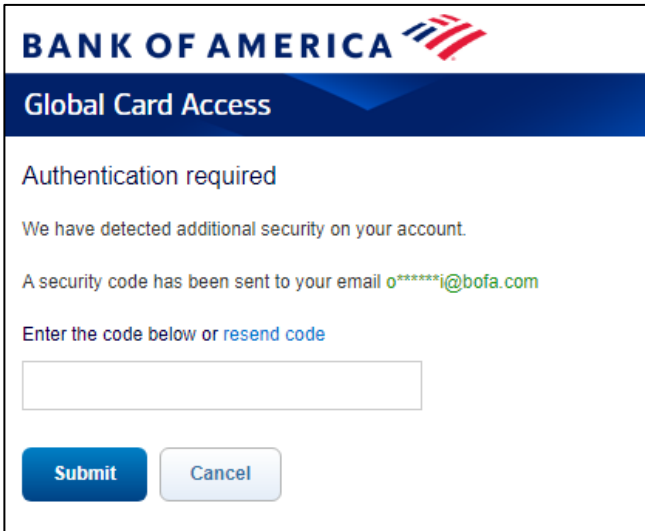
Question 2

Answer 2

Question 3

Inicie sesión en Global Card Access

Inicie sesión en Global Card Access a través del siguiente enlace: bankofamerica.com/globalcardaccess. Después del registro, el posterior inicio de sesión en Global Card Access para todos los usuarios requerirá una verificación adicional a través de una contraseña de un solo uso (OTP, por sus siglas en inglés).



BANK OF AMERICA

Global Card Access

Authentication required

We have detected additional security on your account.

A security code has been sent to your email o*****i@bofa.com

Enter the code below or [resend code](#)

Submit **Cancel**

Importante:

- La OTP solo es válida para la sesión actual y caduca en un plazo de 15 minutos desde el momento en que se genera. Se requerirá una nueva OTP si la sesión actual finaliza debido a la inactividad.
- El enlace de reenvío de código le permite solicitar que se reenvíe por correo electrónico una nueva OTP. Esto hará que caduquen todas las contraseñas pendientes enviadas previamente durante el inicio de sesión. Varias entradas de token vencidas consecutivas o no válidas harán que su cuenta se bloquee.
- Para los usuarios de Norteamérica y EMEA, una OTP por correo electrónico solo se presenta al iniciar sesión por primera vez desde un dispositivo o navegador en concreto. Los usuarios pueden seguir accediendo a Global Card Access desde el mismo dispositivo o navegador y no se les pedirá que envíen una OTP por correo electrónico en adelante, ya que ahora se ha convertido en un dispositivo reconocido.
- Los usuarios de APAC recibirán una OTP por correo electrónico cada vez que inicien sesión debido a los requisitos normativos regionales.

Si se ha registrado usted mismo en una cuenta, utilizará el ID de usuario y la contraseña que creó al registrarse para iniciar sesión en Global Card Access.

Si un administrador del programa de su organización o un usuario de Bank Servicing ha creado su función por usted, recibirá un correo electrónico de Global Card Access con su ID de usuario y un enlace para completar el registro estableciendo su contraseña y preguntas de seguridad. Puede cambiar su ID de usuario desde su perfil al iniciar sesión en Global Card Access.

Panel de administración de programas

Desde el panel de control de la cuenta, puede consultar los gastos, los extractos de cuenta, el límite de crédito, el límite de crédito disponible y emitir pagos para sus cuentas corporativas. Los siguientes enlaces se encuentran en la barra de navegación a la derecha y proporcionan un acceso rápido y fácil a las funciones usadas habitualmente:

- Mis tareas: área de notificación de cualquier elemento pendiente que requiera atención (p. ej., caducidad de la contraseña o caducidad del código de solicitud de cuenta).
- Acciones rápidas: las opciones enumeradas en este menú varían según la configuración de la empresa y la disponibilidad por región.
 - Gestionar solicitudes de cuenta: acceda a las solicitudes de cuenta que esperan aprobación y consulte el historial de solicitudes de cuenta.
 - Administrar usuarios: vea una lista completa de usuarios vinculados a su empresa.
 - Ver extractos de cuenta: ver extractos de cuenta corporativos actuales e históricos. Recibirá una notificación por correo electrónico cuando su extracto de cuenta esté disponible para su visualización.
 - Recompensas con tarjeta (solo en EE. UU.): las cuentas aptas pueden ver el saldo de puntos de recompensa Premium disponibles y acceder al sitio de recompensas para canjear puntos de recompensa.
- Enlaces relacionados
 - Global Reporting y Account Management: las funciones Global Reporting y Account Management se muestran en una nueva pestaña o ventana del navegador.
 - Works: Works se abre en una nueva pestaña o ventana del navegador.
 - Card Assistant: abre Card Assistant, su centro de recursos de tarjetas comerciales, en una nueva pestaña o ventana del navegador.

Program Administration My Accounts

BANK OF AMERICA

Global Card Access

Home Payments Account Requests Administration Enrollment Report

Account Summary Balances as of Nov 28, 2023, 11:52 AM CST

Account ending 2043

| Current balance | Available credit | Credit limit |
|-----------------|------------------|--------------|
| 69,723.80 | 4,927,976.20 | 5,001,200.00 |

Statements

Corporate statements Cardholder statements

2023

| | |
|--------------------|--|
| November 01, 2023 | |
| October 26, 2023 | |
| September 26, 2023 | |
| September 11, 2023 | |
| September 08, 2023 | |
| September 01, 2023 | |

My tasks

No tasks at this time.

Quick actions

- Manage account requests
- Manage users
- View statements

Related links

- Global Reporting and Account Management
- Works
- Card Assistant

Gestión de usuarios

Como administrador del programa, puede ver, crear, editar y desactivar usuarios, así como restablecer sus contraseñas.

Visualización de usuarios

1. Vaya a → *Administration Users* (Usuarios de administración) desde la parte superior del panel de administración de programas o a *Manage users* (Administrar usuarios) desde el menú Acciones rápidas.
2. Esto le mostrará una vista de todos los usuarios dentro de su alcance que están registrados para Global Card Access, junto con su tipo de función.

Creación de un usuario

1. Vaya a → *Administration Users* (Usuarios de administración) desde la parte superior del panel de administración de programas o a *Manage users* (Administrar usuarios) desde el menú Acciones rápidas.
2. Haga clic en *Create* (Crear) en la esquina superior derecha.
3. Seleccione *Create User* (Crear usuario).
4. Introduzca los datos del usuario: Nombre, ID de usuario, ID de empleado (opcional) y dirección de correo electrónico.
 - El ID de usuario deberá tener un mínimo de siete caracteres y un máximo de 50.
 - Puede personalizar la etiqueta de campo desde la ID de empleado hasta su identificador interno preferido (p. ej., número de persona). Consulte la sección “Customize Applications” (Personalizar aplicaciones) para obtener más información.
5. Haga clic en *Save and continue* (Guardar y continuar).

Home Account Requests Administration

/ Administration / Users / Create User

QL Test Company

Create new user

1. Enter user details

| | | | |
|-------------|----------|---------------|------------------------|
| First name | Alec | User ID | alec_smith |
| Middle name | optional | Email address | customermail@works.com |
| Last name | Smith | Employee ID | optional |

[Save and continue](#) [Cancel](#)

6. Asigne las funciones deseadas al nuevo usuario. Las opciones de funciones son:
 - Administrador del programa: el usuario tendrá permiso administrativo completo sobre las cuentas de facturación seleccionadas.
 - i. Haga clic en *Add accounts* (Agregar cuentas) para asignar las cuentas para las que el usuario será el administrador del programa.
 - ii. Seleccione el botón de opción para el tipo de administrador del programa que desea crear.
 1. Al seleccionar *All accounts (Global)*, [Todas las cuentas (global)], el usuario tendrá la función de Administrador del programa global, donde tendrá privilegios

administrativos sobre todas las cuentas de facturación existentes de su empresa, así como sobre cualquier posible cuenta de facturación futura.

Nota: Es posible que esta opción no esté disponible en función de la configuración de su empresa.

2. Al seleccionar *Select accounts (Scoped)* [Seleccionar cuentas (limitadas)], se le dará al usuario la función Administrador del programa dentro de un límite, donde tendrá privilegios administrativos sobre un subconjunto de las cuentas de facturación de su empresa. Utilice los botones de opción para designar estas cuentas específicas.
 3. Si selecciona *None* (Ninguno), se eliminará la función de Administrador del programa del usuario.
- iii. Una vez que haya realizado su selección, haga clic en *Add* (Agregar).
- Auditor: El usuario tendrá permisos de solo lectura en las cuentas de facturación seleccionadas.
 - i. Haga clic en *Add accounts* (Agregar cuentas) para asignar cuentas para las que el usuario será auditor.
 - ii. Seleccione el botón de opción para el tipo de auditor del programa que desea crear.
 1. Al seleccionar *All accounts (Global)*, [Todas las cuentas (global)], el usuario tendrá la función de Auditor del programa global, donde tendrá privilegios administrativos sobre todas las cuentas de facturación existentes de su empresa, así como sobre cualquier posible cuenta de facturación.

Nota: es posible que esta opción no esté disponible en función de la configuración de su empresa.
 2. Al seleccionar *Select accounts (Scoped)* [Seleccionar cuentas (limitadas)] se le dará al usuario la función Auditor del programa dentro de un límite, donde tendrá privilegios administrativos sobre un subconjunto de las cuentas de facturación de su empresa. Utilice los botones de opción para designar estas cuentas específicas.
 3. Al seleccionar *None* (Ninguno) se elimina la función de Auditor del usuario.

Importante: un usuario no puede ser Administrador del programa y Auditor a la vez para la misma cuenta de facturación.





- Encargado de aprobar la solicitud de cuenta: Si corresponde a su programa, el usuario podrá aprobar solicitudes de cuenta en línea.
 - i. Haga clic en *Add approval groups* (Agregar grupos de aprobación) para agregar los grupos para los que este usuario debe aprobar las solicitudes.
 - Titular de tarjeta: Este usuario está asignado a la cuenta de tarjeta de otro titular de tarjeta para realizar funciones en su nombre, como configurar alertas, extractos de cuenta de cheques, etc. Esta función suele asignarse a los asistentes ejecutivos para que realicen funciones para la tarjeta de su gestor.
 - i. Haga clic en *Add accounts* (Agregar cuentas) para agregar cuentas sobre las cuales el usuario tendrá ciertos permisos.
7. Una vez que haya completado la asignación de funciones, haga clic en *Finish* (Finalizar). El usuario recibirá un correo electrónico de bienvenida de Global Card Access con su ID de usuario y los pasos para completar su registro.

Editar datos del usuario

1. Vaya a → *Administration Users* (Usuarios de administración) desde la parte superior del panel de administración de programas o a *Manage users* (Administrar usuarios) desde el menú Acciones rápidas.
2. Haga clic en el nombre del usuario deseado y seleccione *View Full Details* (Ver datos completos).

Administration / Users

Users Create Clear Filters

| User ID | Name | Program Administrator (Global) | Program Administrator (Scoped) | Group Approver | Cardholder | Proxy User | Global Auditor | Scoped Auditor | GRAM | Locked | Email Address | Last Login Date |
|---------------------|--|--------------------------------|--------------------------------|----------------|------------|------------|----------------|----------------|------|----------|------------------------------|----------------------|
| romainvyts | Wyts, Romain | | | | X | | | | | Unlocked | customermail@works.com | 2021-01-06 12:10 CST |
| cardholder2520 | 2520, card | | | | X | | | | | Unlocked | medikonda.keerthi@bofa.com | 2021-08-18 07:43 CDT |
| msEmailRegistration | 2520, mari | | | | X | | | | | Unlocked | msspencer@bofa.com | |
| number_2520 | <div>  View Full Details  Reset Password  Resend Welcome Email  Deactivate User </div> | | | | X | | | | | Unlocked | mutheswari.muthuraj@bofa.com | 2021-11-15 06:41 CST |
| mari2520B | | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-30 09:22 CDT |
| ms2520cpv2.4533 | | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-03 16:13 CDT |

3. Edite los campos disponibles como desee y haga clic en *Save* (Guardar).
 - La ID de usuario deberá tener un mínimo de siete caracteres y un máximo de 50.
 - Suprimir correo electrónico a la espera de aprobación: al seleccionar esta casilla, el usuario puede optar por no recibir un correo electrónico cada vez que un solicitante envíe una solicitud de cuenta.
 - No incluya mi nombre ni mi dirección de correo electrónico en los correos electrónicos para el solicitante: si selecciona esta casilla de verificación, se suprimirá el nombre y la dirección de correo electrónico del usuario en los correos electrónicos para los solicitantes.

Desactivación de un usuario

1. Vaya a → *Administration Users* (Usuarios de administración) desde la parte superior del panel de administración de programas o a *Manage users* (Administrar usuarios) desde el menú Acciones rápidas.
2. Haga clic en el nombre del usuario deseado y seleccione *Deactivate User* (Desactivar usuario).
3. Haga clic en *Ok* (Aceptar). El usuario ya no podrá iniciar sesión en Global Card Access.

Restablecimiento de una contraseña

1. Vaya a → *Administration Users* (Usuarios de administración) desde la parte superior del panel de administración de programas o a *Manage users* (Administrar usuarios) desde el menú Acciones rápidas.
2. Haga clic en el nombre del usuario deseado y seleccione *Reset Password* (Restablecer contraseña).
3. Haga clic en *Ok* (Aceptar). Se enviará al usuario un correo electrónico con instrucciones adicionales para restablecer correctamente su contraseña.

Reenviar correo electrónico de bienvenida

1. Vaya a → *Administration Users* (Usuarios de administración) desde la parte superior del panel de administración de programas o a *Manage users* (Administrar usuarios) desde el menú Acciones rápidas.
2. Haga clic en el nombre del usuario deseado y seleccione *Resend Welcome Email* (Reenviar correo electrónico de bienvenida).

- Haga clic en *Ok* (Aceptar). Se enviará al usuario un correo electrónico con instrucciones adicionales para restablecer correctamente su contraseña.


Mantenimiento de la cuenta corporativa

- Vaya a *Administration Corporate Accounts* → (Administración de cuentas corporativas) desde la parte superior del panel de administración del programa.
- Haga clic en la cuenta que desea editar y seleccione *View Full Details* (Ver datos completos).

QL Test Company

Administration / Corporate Accounts

Corporate Accounts [Clear Filters](#)

| Account name | Account last 4 | TSYS account ID | TSYS company number | Region | Eligible for account requests | Eligible for alerts |
|--|----------------|-----------------|---------------------|--------|-------------------------------|---------------------|
| APAC AUD CC 1500000 | 0766 | 80000001108 | 1500000 | APAC | X | |
|  View Full Details | 7759 | 80000014047 | 5800044 | EMEA | X | |

- Edite los campos como desee y haga clic en *Save* (Guardar).
 - Un nombre grabado en relieve 2 es el valor predeterminado que se mostrará en las tarjetas emitidas a nuevos solicitantes; este suele ser el nombre de la empresa.
 - Suprimir el código contable ocultará el campo Código contable a los administradores del programa en las solicitudes de cuentas en línea.
 - Seleccione el método de aprobación para las solicitudes de cuenta. Al seleccionar "Additional Approval - Online" (Aprobación adicional: en línea), se permitirá configurar grupos de aprobación y paneles de aprobación para revisar y aprobar solicitudes de cuentas en línea, además de la aprobación del administrador del programa.

Program Administration
My Accounts

BANK OF AMERICA
Olga Terezi

Global Card Access

Home
Account Requests
Administration

/ Administration / Corporate Accounts / Corporate Account Details

Account Name:

EXPERIAN FILE TEST34

Account Last 4:

1086

TSYS Company Number:

6600067

HL1:

6600067

Region:

US/Canada

Currency:

U.S. DOLLAR

Enrolled in Alerts:

No

Embossed Name 2 Default:

EXPERIAN FILE TEST34

(1 - 21)

Suppress Accounting Code:

☐ Yes
☒ No

Approval Method:

Additional Approval - Online

Allow Cash:

☐ Yes
☒ No

Delivery Options:

☐ Standard Post to the cardholder at the primary mailing address (5-10 business days)
☐ Overnight/urgent delivery to the cardholder at the primary mailing address (A fee may apply.)
☐ Ship to the Program Administrator using the company bulk ship address (2-6 business days)

Save

- Para agregar una cuenta corporativa, seleccione *Add* (Agregar) en la parte inferior izquierda de la pantalla "Corporate Accounts" (Cuentas corporativas; solo para cuentas de Norteamérica). Aparecerá la página Registro de tarjeta nueva.

Gestión de solicitudes de cuentas en línea

Global Card Access permite solicitar a sus empleados cuentas de tarjeta nueva en línea. Debe proporcionar a sus empleados el código de solicitud de cuenta que genere usted para que las solicitudes de tarjetas en línea se envíen correctamente. Como administrador del programa, podrá crear y administrar códigos de solicitud de cuenta y revisar y aprobar solicitudes de cuentas nuevas. Su empresa debe estar configurada para esta función.

Creación de códigos de solicitud de cuenta (tutorial en vídeo)

Sus empleados utilizarán los códigos de solicitud de cuenta para solicitar cuentas en línea. Cada código de solicitud de cuenta tiene configuraciones específicas que rigen cómo se configura y gestiona la cuenta de un empleado, como la cuenta corporativa a la que se vinculará una cuenta y el tipo de tarjeta que recibirá el solicitante tras la aprobación.

Nota: Una vez que se ha solicitado una cuenta para una cuenta corporativa o tipo de producto en particular, no puede cambiarse. Si el solicitante ha enviado una solicitud utilizando un código de solicitud de cuenta incorrecta para la cuenta prevista, debe enviar una nueva solicitud.

1. Vaya a *Account Requests > Key Management* (Solicitudes de cuenta > Gestión de códigos) desde la parte superior del panel de administración de programas.
2. Haga clic en el menú desplegable *Create* (Crear) en la esquina superior derecha y seleccione *Create Account Request Keys* (Crear códigos de solicitud de cuenta).

| Global Card Access | | | | | | | | | | | | |
|--|---|----------------|-----------|-----------------------------|-------------------------------|-----------------------|--------------------|----------------------|------------|-----------------|------------------------|----------|
| Home Account Requests Administration Bank User | | | | | | | | | | | | |
| / Account Requests / Key Management | | | | | | | | | | | | |
| Account Request Keys | | | | | | | | | | | | Create ▼ |
| Create Account Request Keys | | | | | | | | | | | | |
| Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses | |
| <input type="checkbox"/> | | | All ▼ | | | | | | | | | |
| <input type="checkbox"/> Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-ix4-5zj | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a | |
| <input type="checkbox"/> Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | io0-0nm-5x4 | Alerts | PA Approval Only | | | 2020-12-16 | 2020-12-19 | 5 | |
| <input type="checkbox"/> Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67j-q8l | MK | Single Group Approval | Group | 1,500.00 | 2020-09-22 | 2022-09-22 | 100 | |
| <input type="checkbox"/> Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | MCHIP ADV AUD TRVL - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a | |
| <input type="checkbox"/> Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | EMEA key | PA Approval Only | | 2,500.00 | 2020-07-22 | 2022-07-22 | n/a | |
| <input type="checkbox"/> Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-gu0 | MCHIP ADV SEK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a | |

Nota: Si existen varias cuentas corporativas, aparecerá la ventana *Select Corporate Account(s)* [Seleccionar cuenta(s) corporativas]. Seleccione una cuenta corporativa y haga clic en *Ok* (Aceptar).

3. Complete la página *Create Account Request Key(s)* [Crear código(s) de solicitud de cuenta].
 - a. Configure su código de solicitud de cuenta en la sección *Configuration* (Configuración).
 - i. *Key Nickname* (Apodo de código) le da la opción de nombrar el código con un nombre fácil de usar.

- ii. Los campos en *Expiration Date* (Fecha de caducidad) son opcionales y le proporcionan alertas cuando los códigos están a punto de caducar.
 - b. Seleccione cualquiera de las opciones posibles en *Account Request Options* (Opciones de solicitud de cuenta).
 - i. Al seleccionar *Display Employee ID* (Mostrar ID de empleado), debe establecer una longitud mínima y máxima para el campo ID de empleado. También puede indicar si la ID de empleado es obligatoria cuando se envía una solicitud de cuenta.
 - ii. Al seleccionar la opción *Suppress emails* (Suprimir correos electrónicos) se evita que los correos electrónicos relacionados con solicitudes de cuentas se envíen a los solicitantes.
 - iii. Al seleccionar la opción *Suppress Desired Credit Limit* (Suprimir límite de crédito deseado), se oculta este campo a los solicitantes que completen una solicitud de cuenta en línea.
 - iv. La introducción de un importe en el campo *Default Credit Limit* (Límite de crédito predeterminado) hace que el importe del límite de crédito se establezca de forma predeterminada en el formulario solicitud de cuenta para los administradores del programa. Aún puede editar el importe del límite de crédito antes de aprobar una solicitud, si es necesario.
 - v. Al seleccionar *Require Manager Information* (Requerir información del gestor), se indica que se requiere un nombre de gestor cuando se envía la solicitud de cuenta.
 - c. Seleccione una de las opciones en *Approval Method Options* (Opciones de método de aprobación).
 - i. Al seleccionar *PA Approval Only* (Solamente Administrador de programa), las solicitudes de cuenta se envían directamente al administrador del programa para su aprobación.
 - ii. Al seleccionar *Single Group Approval* (Aprobación de grupo único), primero se envían las solicitudes de cuenta a los miembros del grupo de aprobación seleccionado para su aprobación antes de enviarse al Administrador del programa. Haga clic en la herramienta de búsqueda para seleccionar el nombre de un grupo de aprobación.
 - iii. Al seleccionar *Panel Approval* (Aprobación de panel), las solicitudes de cuenta se dirigen a los Grupos de aprobación en el orden designado en el Panel antes de enviarse al Administrador del programa. Haga clic en la herramienta de búsqueda para seleccionar el nombre de un grupo de aprobación.
4. Haga clic en *Save* (Guardar).

Create Account Request Key(s)

* Corporate Account:

Settings

* Number of Keys: (1 - 100)

Key Nickname:

A sequence number will be added to the key nickname when more than one key is requested.

* Start Date:

* Expiration Date:

☐ Limit number of uses to (1 - 10,000)

☐ Send key expiration reminder days before expiration

Account Request Options

☐ Display Employee ID
☐ Suppress emails to applicants
☐ Suppress Desired Credit Limit from applicants

Default Credit Limit:

(1234.00)

☐ Require Manager Information

Approval Method Options

Approval Options:

Desactivación o edición de códigos de solicitud de cuenta

1. Vaya a *Account Requests > Key Managemet* (Solicitudes de cuenta > Gestión de códigos) desde la parte superior del panel de administración de programas.
2. Para desactivar un código de solicitud de cuenta, seleccione el código de solicitud de cuenta que desea desactivar, haga clic en *Deactivate* (Desactivar) y, a continuación, haga clic en *Accept* (Aceptar).

| Account Request Keys Create | | | | | | | | | | | | | |
|--|--------|---|----------------|-----------|-----------------------------|------------------------------|-----------------------|--------------------|----------------------|------------|-----------------|------------------------|--------------------------|
| Clear Filters | | | | | | | | | | | | | |
| | Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses | Remaining Number of Uses |
| <input checked="" type="checkbox"/> | Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-jk4-5zj | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a | n/a |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | io0-0nm-5x4 | Alaska | PA Approval Only | | | 2020-12-16 | 2020-12-19 | 5 | 5 |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | kg6-ir5-177 | | Only | | | 2020-12-16 | 2022-12-16 | n/a | n/a |
| <input type="checkbox"/> | Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67j-q8l | | Approval | Group | 1,500.00 | 2020-09-22 | 2022-09-22 | 100 | 63 |
| <input type="checkbox"/> | Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | | Only | | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | | Only | | 2,500.00 | 2020-07-22 | 2022-07-22 | n/a | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-gu0 | MCHIP ADV SEK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV DKK COM | 6101 | EMEA | e7v-r4f-i1g | MCHIP ADV DKK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 2f2-o62-u4w | BROADCOM 5800044 NOK CC | PA Approval Only | | 100.00 | 2020-08-13 | 2022-08-13 | n/a | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 09c-b9e-f6s | | Single Group Approval | test | | 2020-10-01 | 2022-10-01 | n/a | n/a |

1 Selected | 41 items

Show 10 per page

Page: 1 of 5

Disable

Download

- Para editar un código de solicitud de cuenta, seleccione el código de solicitud de cuenta deseada, edite los parámetros según sea necesario y haga clic en **Save** (Guardar).

Gestionar aprobadores

Como parte de su configuración de solicitud de cuenta en línea, puede designar grupos o paneles de aprobación. El uso de grupos y paneles de aprobación permite a su organización exigir aprobaciones adicionales para solicitudes de cuentas en línea. El uso de una sola aprobación de grupo requiere la aprobación de un aprobador del grupo de aprobación designado. Una vez aprobada, la solicitud se envía al Administrador del programa para su aprobación final. El uso de paneles de aprobación requiere la aprobación de un aprobador de cada uno de los grupos de aprobación que son miembros del panel de aprobación. Puede asignarse un máximo de dos grupos de aprobación a un panel. Un panel de aprobación utiliza un orden de aprobación establecido, que puede editar el Administrador del programa.

Creación de grupos de aprobación

1. Vaya a *Administration > Manage Approvers* (Administración > Gestionar aprobadores) desde la parte superior del panel de administración del programa.
2. Haga clic en el menú desplegable *Create* (Crear) en la esquina superior derecha y seleccione *Create Approval Group* (Crear grupo de aprobación).
3. Introduzca el Nombre y la Descripción del grupo de aprobación (opcional) y haga clic en *Save* (Guardar).
4. Para que pueda seleccionar los usuarios del grupo, aparecerá la ventana *Select User(s)*. Seleccione la casilla de verificación junto a cada usuario que desee añadir y haga clic en *Ok* (Aceptar).

Global Card Access

Home Account Requests

/ Administration / Manage Approvers

Test 3

* Name: Test 3

Approvers Panels

Name

0 Selected | 0 items

Remove Selected Add Approver(s)

Select User(s)

Clear Filters

| | Last Name | First Name | User ID | Email Address |
|-------------------------------------|----------------------------|------------------------------|-----------------|---------------------------------|
| <input type="checkbox"/> | a<script>alert(1)</script> | a'><script>alert(3)</script> | qwerqwer | michael.ayer@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Priya | priya_grp | priyadharshini.sukumar@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Anusha | Anusha Approver | anusha.kantu@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Friday | FridayApp | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr2 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr30 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | ApproverTest | Group | Group Approver | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Test | Test.Auditor | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Approver | ApprAud | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Auditor | Global | Global.Auditor1 | anusha.kantu@bofa.com |

3 Selected | 51 items Show 10 per page Page: 1 of 6

OK Cancel

Page: 1 of 0

- Haga clic en la pestaña *Keys* (Códigos) para asignar los códigos de solicitud de cuenta al grupo.
- Haga clic en *Add Key(s)* [Agregar código(s)] y haga clic en la casilla de verificación junto a cada código de solicitud de cuenta que desee agregar.
- Haga clic en *Ok* (Aceptar).

| | Account Request Key | Key Nickname | Corporate Account | Account Last 4 | Region | Status |
|-------------------------------------|---------------------|-------------------------|-------------------------|----------------|-----------|--------|
| <input checked="" type="checkbox"/> | 2f2-o62-u4w | BROADCOM 5800044 NOK CC | BROADCOM 5800044 NOK CC | 7759 | EMEA | Active |
| <input type="checkbox"/> | kq6-ir5-177 | | EXPERIAN FILE TEST34 | 1086 | US/Canada | Active |

Editar grupos de aprobación

- Vaya a *Administration > Manage Approvers* (Administración > Gestionar aprobadores) desde la parte superior del panel de administración del programa.
- Haga clic en un nombre de grupo en particular.
- Para eliminar un aprobador, seleccione la casilla de verificación junto al nombre del aprobador, haga clic en *Remove Selected* (Eliminar seleccionado) y haga clic en *Ok*.
- Para eliminar los códigos de solicitud de cuenta, haga clic en la pestaña *Keys* (Códigos), seleccione la casilla de verificación junto a cada código de solicitud de cuenta que desee eliminar, haga clic en *Remove* (Eliminar) y haga clic en *Ok* (Aceptar).
- Para editar un nombre de grupo o una descripción, edite el texto en el campo *Name and Description* (Nombre y descripción) y haga clic en *Save* (Guardar).
- Para descargar la información del grupo de aprobación, seleccione la casilla de verificación de cada grupo, haga clic en *Download* (Descargar), seleccione una opción de formato y siga las indicaciones para guardar o abrir el archivo.
- Para eliminar un grupo de aprobación, seleccione la casilla de verificación del nombre del grupo que desea eliminar y haga clic en *Delete* (Eliminar), seguido de *Ok* (Aceptar).

Nota: una vez eliminadas, las solicitudes de cuenta se enviarán al Administrador o Administrador(es) del Programa.

Creación de paneles de aprobación

1. Vaya a *Administration > Manage Approvers* (Administración > Gestionar aprobadores) desde la parte superior del panel de administración del programa.
 2. Haga clic en el menú desplegable *Create* (Crear) en la esquina superior derecha y seleccione *Create Approval Panel* (Crear panel de aprobación).
 3. Introduzca un nombre y la descripción del panel de aprobación (opcional) y haga clic en *Save* (Guardar).
 4. Haga clic en *Add Approval Group* (Agregar grupo de aprobación) para agregar grupos al panel.
- Nota:* puede asignarse un máximo de dos grupos de aprobación a un panel.

Home Account Requests Administration

/ Administration / Manage Approvers / Groups and Panels / Panel Details

Panel 3

* Name:

Description:

Approval Groups

| Approval Order | Name | Description |
|--|------|-------------|
| There are no approval groups assigned to this panel. | | |

[+ Add Approval Group](#)

[Save](#)

5. Haga clic en *Save* (Guardar).
8. Haga clic en “Add Keys” [Agregar código(s)] y haga clic en la casilla de verificación junto a cada código de solicitud de cuenta que desee agregar.
6. Haga clic en *Ok* (Aceptar).

Editar paneles de aprobación

1. Vaya a *Administration > Manage Approvers* (Administración > Gestionar aprobadores) desde la parte superior del panel de administración del programa.
2. Haga clic en la pestaña *Panels* (Paneles) y, a continuación, seleccione el nombre del panel específico que desea editar.
3. Para eliminar un grupo de aprobación, haga clic en la X junto al nombre del grupo de aprobación y haga clic en *Save* (Guardar).
4. Para cambiar el orden de los grupos de aprobación, haga clic en el menú desplegable “Approval Order” (Orden de aprobación), seleccione una opción numérica para cada grupo y haga clic en *Save* (Guardar).
5. Para agregar un código de solicitud de cuenta, haga clic en *Add Key(s)*. Seleccione la casilla de verificación para cada código de solicitud de cuenta que se añadirá al panel y haga clic en *Ok* (Aceptar).
6. Para eliminar los códigos de solicitud de cuenta, seleccione la casilla de verificación junto a cada código de solicitud de cuenta que desee eliminar, haga clic en “Remove” (Eliminar) y haga clic en “Ok” (Aceptar).
7. Para editar un nombre de panel o una descripción, edite el texto del campo *Name and Description* (Nombre y descripción), según sea necesario, y haga clic en *Save* (Guardar).


- Para descargar la información del panel de aprobación, seleccione la casilla de verificación de cada panel, haga clic en *Download* (Descargar), seleccione una opción de formato y siga las indicaciones en “Save” u “Open” para guardar o abrir el archivo.
- Para eliminar un panel de aprobación, seleccione la casilla de verificación del nombre del panel que desea eliminar y haga clic en *Delete* (Eliminar), seguido de *Ok* (Aceptar).

Nota: una vez eliminadas, las solicitudes de cuenta se enviarán al Administrador o Administrador(es) del Programa.

Completar y aprobar solicitudes de cuenta (tutorial en vídeo)

- Vaya a *Account Requests > Approvals - Program Administrator* (Solicitudes de cuenta > Aprobaciones: Administrador del programa) desde la parte superior del panel Administración del programa o a *Manage account requests* (Administrar solicitudes de cuentas) desde el menú Acciones rápidas.

[Home](#)
[Account Requests](#)
[Administration](#)

 / [Account Requests](#) / [Approvals - Program Administrator](#)

Account Requests - Program Administrator

Awaiting Approval

Submitted Requests

Completed Requests

Errors 1

Clear Filters

| | Applicant | Embossed Name 1 | Corporate Account | Submitted | Account Request Key | Account Request ID |
|-----------------------|--------------------|-----------------|---|----------------------|-----------------------------|--------------------|
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:29 CST | 7j1-67j-q8l | 244624 |
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:28 CST | 7j1-67j-q8l | 244623 |
| <input type="radio"/> | Smith, Joey | JOEY SMITH | WORKS 8594079 T JOHNSON | 2020-12-09 17:48 CST | ra1-jj1-6ux | 244613 |
| <input type="radio"/> | sample, test | TESTING | WORKS TEST CC 8705504 | 2020-11-16 00:49 CST | 7j1-67j-q8l | 244572 |
| <input type="radio"/> | Corner, Lex | TOKENTEST | MCHIP ADV CHF COM | 2020-11-11 07:22 CST | yo2-oo9-jt9 | 244571 |

- Selecione el botón de opción junto a la solicitud de cuenta deseada y haga clic en *Complete & Approve* (Completar y aprobar).
- Verifique la información de la solicitud de tarjeta y edite los datos de la cuenta, según sea necesario.

Nota: debe verificar que se ha introducido la dirección correcta para garantizar la entrega correcta de la tarjeta.

- Una vez que haya completado su revisión o ediciones, haga clic en *Approve* para aprobar la solicitud o *Reject* para rechazar la solicitud.

Nota:

- se envía a los solicitantes un correo electrónico para confirmar la aprobación o el rechazo de la solicitud de cuenta, a menos que el código de solicitud de cuenta se haya establecido en *Suppress emails to applicants* (Suprimir correos electrónicos a los solicitantes).
- Si se rechaza la solicitud de cuenta, el empleado deberá crear una nueva solicitud de cuenta si es necesaria.
- Como Administrador del programa, puede omitir una solicitud concreta que requiera aprobación de grupo en la pestaña *Submitted Requests* (Solicitudes enviadas), haciendo clic en la casilla de verificación junto al solicitante y haciendo clic en *Bypass* (Omitir). Tendrá que proporcionar un comentario para justificar la omisión.

Gestión de errores de solicitud de cuenta (solo EE. UU.)

Para los programas de EE. UU., los Administradores del Programa pueden resolver errores de dirección identificados con solicitudes de cuenta. Los errores de dirección consisten en discrepancias entre el estado y el código postal proporcionado en la solicitud de cuenta. Esta función solo está disponible para los programas de EE. UU.

1. Vaya a *Account Requests > Approvals - Program Administrator* (Solicitudes de cuenta > Aprobaciones: Administrador del programa) desde la parte superior del panel Administración del programa o a *Manage account requests* (Administrar solicitudes de cuenta) desde el menú Acciones rápidas.
2. Haga clic en la pestaña *Errors* (Errores).

Nota: Se muestra un número en la pestaña Errores cuando se han identificado errores de dirección de solicitud de cuenta.

3. Seleccione el botón de opción junto al solicitante deseado.
4. Haga clic en *Correct & Resubmit* (Corregir y volver a enviar).

Home Account Requests Administration

/ Account Requests / Approvals - Program Administrator

Account Requests - Program Administrator

Awaiting Approval Submitted Requests Completed Requests Errors 1 Clear Filters

| | Applicant | Error | Embossed Name 1 | Errors Account | Submitted | Account Request Key | Account Request ID | Approved By | Approved Date |
|----------------------------------|-------------------|----------------------|------------------|---------------------------------------|----------------------|-----------------------------|--------------------|-------------|----------------------|
| <input checked="" type="radio"/> | Creation, Request | View | REQUEST CREATION | WORKS TEST CC 8705504 | 2020-11-11 06:25 CST | 711-671-981 | 244570 | GPA, Anusha | 2020-11-11 06:26 CST |

1 Selected | 1 item Show 10 per page Page: 1 of 1

Reject Correct & Resubmit

5. Edite el estado o el código postal en la sección Dirección si es necesario.
6. Haga clic en *Resubmit* (Volver a enviar). A continuación, la aplicación pasará de la cola de errores a la cola *Completed Requests* (Solicitudes completadas).

Ver y descargar solicitudes de cuenta completadas

1. Vaya a *Account Requests > Approvals - Program Administrator* (Solicitudes de cuenta > Aprobaciones: Administrador del programa) desde la parte superior del panel Administración del programa o a *Manage account requests* (Administrar solicitudes de cuenta) desde el menú Acciones rápidas.
2. Haga clic en la pestaña *Completed Requests* (Solicitudes completadas).
3. Seleccione el solicitante cuya solicitud desea ver y haga clic en *View Full Details* (Ver datos completos).
4. Seleccione la casilla de verificación junto a cada solicitud de cuenta que desea descargar.

- Haga clic en "Download" (Descargar).
- Seleccione el formato de descarga y siga las indicaciones en "Save" u "Open" para guardar o abrir el archivo.

Personalizar aplicaciones

Puede personalizar las solicitudes de tarjeta agregando una notificación que se mostrará a los solicitantes en la parte superior del formulario de solicitud de cuenta o personalizando el identificador interno solicitado a los solicitantes durante el proceso de solicitud de tarjeta en línea.

Notificaciones

- Vaya a *Administration* → *Customize Application* (Administración > Personalizar aplicación) desde la parte superior del panel de administración del programa.
- Si ha configurado previamente alguna notificación, las verá en esta vista. Si desea agregar una nueva notificación, haga clic en el menú desplegable *Create* (Crear) en la esquina superior derecha.
- Haga clic en *Create Notification* (Crear notificación).

| Notification ID | Corporate Account | Updated By | Updated | Expiration Date |
|------------------------------|---|-------------|----------------------|-----------------|
| <input type="checkbox"/> 187 | APAC AUD CC 1500000 | M, Abhishek | 2020-09-09 12:39 CDT | n/a |
| <input type="checkbox"/> 186 | WORKS CAD 8594073 T JOHNSON | M, Abhishek | 2020-09-09 12:38 CDT | n/a |

- Si tiene algún límite sobre varias cuentas corporativas, deberá seleccionar a qué cuenta corporativa desea agregar la notificación. Después de seleccionar la cuenta corporativa, haga clic en *Ok* (Aceptar).
- Introduzca el texto de notificación deseado en el cuadro de texto de *Notificación* y seleccione una fecha de caducidad para el mensaje (opcional).

6. Haga clic en *Save* (Guardar).
7. Puede editar las notificaciones que cree en cualquier momento haciendo clic en el ID de notificación. Para eliminar una notificación, haga clic en la casilla de verificación junto a la ID de notificación y haga clic en *Expire Now* (Caducar ahora), luego haga clic en *Ok* (Aceptar).

Personalizar campo

1. Vaya a *Administration* → *Customize Application* (Administración > Personalizar aplicación) desde la parte superior del panel de administración del programa.
2. Haga clic en la pestaña *Field Customization* (Personalizar campo).
3. El campo identificador de empleado estándar para las aplicaciones de tarjeta es la ID de empleado. Si desea cambiar la etiqueta de este campo por otro tipo de identificador interno, introduzca la nueva etiqueta que desea mostrar a los solicitantes en las solicitudes de tarjetas en línea en el cuadro de texto en *inglés*.

Nota: la etiqueta del campo ID de empleado puede tener hasta 30 caracteres.

4. Introduzca el valor traducido de la nueva etiqueta de campo en francés, alemán, italiano y español.
5. Haga clic en *Guardar*.

Informe de inscripción del usuario

Los administradores del programa pueden ver qué usuarios individuales están o no registrados para Global Card Access.

1. Vaya a *Enrollment Report* (Informe de inscripción) desde la parte superior del Panel de administración del programa.
2. El Informe de inscripción se muestra con todas las cuentas de tarjeta que están dentro de su marco.
 - a. Hay un filtro disponible encima de cada columna para facilitarle la búsqueda.
 - b. Para filtrar en función de cuentas corporativas concretas, utilice el Filtro avanzado del lado izquierdo.
 - c. Si el titular de la tarjeta no ha registrado su tarjeta en Global Card Access, el nombre de usuario aparecerá como “No associated user” (Ningún usuario asociado).

| Advanced Filter | User Name | Name on Card | Account Last 4 | Corporate Account | Card Status |
|--|--------------|--------------|----------------|---------------------------|-------------|
| <input type="checkbox"/> Corporate Account - All | | | | | Active |
| <input type="checkbox"/> 0195, GodProxy | WILLIAM GOAT | | 5800 | EXPERIAN FILE TEST34-1005 | Active |
| <input type="checkbox"/> 1, proxy | DELETE TEST | | 4322 | AUTOM CC 6600948 #1-0435 | Active |
| <input type="checkbox"/> 1, proxy | TONI HODSON | | 7374 | EXPERIAN FILE TEST34-1005 | Active |
| <input type="checkbox"/> 1085, Proxy | | | 7911 | EXPERIAN FILE TEST34-1005 | Active |
| <input type="checkbox"/> 2, proxy | 2520CARD | | 2093 | PINCHECK SEK-8422 | Active |
| <input type="checkbox"/> 2520, check | | | 8350 | PINCHECK SEK-8422 | Active |

3. Para descargar el informe de inscripción, seleccione la casilla de verificación para cada cuenta que desee mostrar en el informe y haga clic en “Download” (Descargar).
4. Seleccione el formato de descarga y siga las indicaciones en “Save” u “Open” para guardar o abrir el archivo.

Mi cuenta

Global Card Access permite a los administradores acceder a sus propias cuentas de tarjeta individuales a través de la pestaña “My Accounts” (Mis cuentas).

The screenshot shows the 'My Accounts' section of the Bank of America Global Card Access interface. At the top, there are navigation links for 'Program Administration' and 'My Accounts'. The user is logged in as 'Chris Test'. The main heading is 'Global Card Access', with sub-links for 'Home', 'Administration', and 'Enrollment Report'. Below this, the 'Account Summary' for 'US LC CERT CORP - 1717' is displayed. The summary includes a table with the following data:

| Payment due date | Current balance | Credit limit | Available credit |
|------------------|-----------------|--------------|------------------|
| Jan 27, 2023 | 195.00 | 60.00 | 0.00 |

Below the table, it shows 'Balance on last statement' as 195.00 and 'Last payment' as 9.23. To the right, under 'My tasks', it states 'No tasks at this time.' Under 'Quick actions', there are links for 'Manage users', 'View statements', and 'Make a payment'. A 'Card rewards' section shows a link to 'Redeem reward points' and a balance of '10,346 pts'.

- Para añadir una cuenta a su perfil de Global Card Access existente, fusionar varias cuentas en Global Card Access o editar su perfil en Global Card Access, consulte [Cómo gestionar su cuenta en Global Card Access](#)
- Para ver su PIN, consulte [Cómo utilizar su tarjeta con chip y PIN](#)
- Para cambiar su PIN, consulte [Cómo cambiar su PIN en Global Card Access](#)
- Para configurar alertas, consulte [Cómo configurar alertas en Global Card Access](#)
- Para ver sus extractos de cuenta, consulte [Cómo ver su extracto de cuenta en Global Card Access](#)
- Para bloquear o desbloquear su tarjeta, consulte [Cómo bloquear y desbloquear su tarjeta en Global Card Access](#)
- Para realizar un pago, consulte las [instrucciones de pago del titular de la tarjeta](#) (solo Norteamérica)
- Para obtener más información sobre la verificación sólida del cliente (SCA, por sus siglas en inglés), consulte la [página web de SCA](#) (solo EMEA)
- Para obtener más información sobre el soporte de la cuenta, los tipos de recompensas disponibles y el uso de puntos, consulta las [Preguntas frecuentes sobre Premium Rewards](#) (solo en EE. UU.)

Global Card Access (Français)

Guide mondial de l'utilisateur – Administrateurs de programme

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Présentation

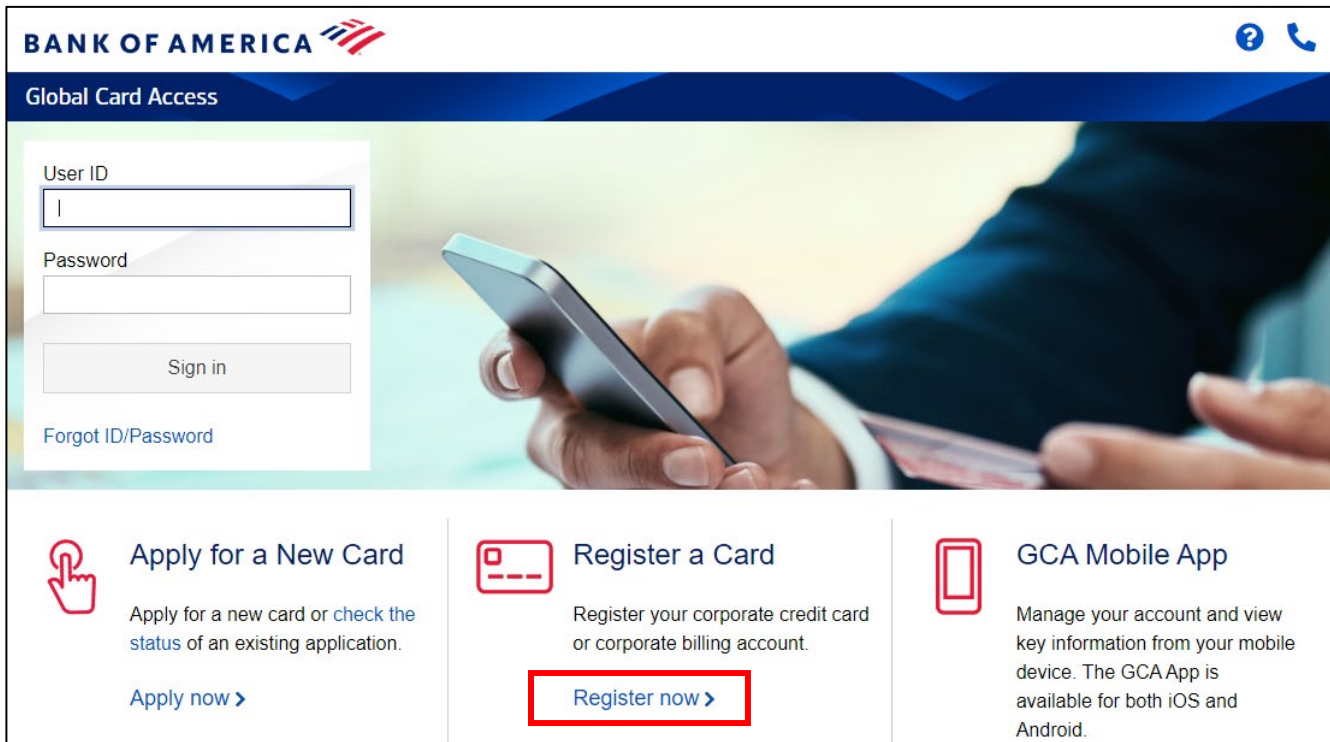
Global Card Access est un outil de gestion des cartes en ligne qui vous permet, ainsi qu'à vos titulaires de cartes, d'accéder aux informations relatives à vos cartes d'entreprise, à tout moment, partout et de la manière dont vous avez besoin. En tant qu'administrateur de programme, vous pourrez consulter le tableau de bord de votre compte mondial, gérer vos titulaires de carte, approuver des demandes d'ouverture de comptes en ligne, effectuer des paiements¹ et consulter vos relevés de compte. Vos titulaires de carte auront accès à des fonctionnalités telles que la vérification de leur limite de crédit, de leur solde et de leur crédit disponible, ainsi que la consultation/modification de leur code PIN, le verrouillage de leur carte, la gestion des alertes, l'accès aux relevés de comptes et la réalisation de paiements² pour plus de facilité et de sécurité.

Première inscription pour les comptes d'entreprise

Un administrateur de programme qui gère le programme de carte d'entreprise d'une société en Amérique du Nord peut s'inscrire à Global Card Access en utilisant le numéro de compte de facturation de la société. Les administrateurs de programme qui gèrent des comptes d'entreprise dans les régions EMEA et APAC doivent contacter les services numériques de cartes (Card Digital Services) pour s'inscrire à Global Card Access. Tous les titulaires de cartes, dans le monde entier, peuvent enregistrer eux-mêmes leur compte sur Global Card Access.

Pour s'inscrire en tant que nouvel utilisateur d'un compte d'entreprise, renseignez les informations suivantes :

1. Accédez au site Web de Global Card Access à l'adresse www.bankofamerica.com/globalcardaccess.
2. Dans l'écran de connexion à Global Card Access, cliquez sur *Register now (S'inscrire maintenant)*.



BANK OF AMERICA


Global Card Access


User ID


Password

Sign in

[Forgot ID/Password](#)

 **Apply for a New Card**
Apply for a new card or [check the status](#) of an existing application.
[Apply now >](#)

 **Register a Card**
Register your corporate credit card or corporate billing account.
[Register now >](#)

 **GCA Mobile App**
Manage your account and view key information from your mobile device. The GCA App is available for both iOS and Android.

- Saisissez le numéro de compte de facturation de votre société et cliquez sur *Continue (Continuer)*.

New User Registration

Enter your corporate card number or your company's billing account number.

Continue

Cancel

- Saisissez les informations relatives à votre compte (nom de la société, numéro de la société, limite de crédit, code postal) et cliquez sur *Continue (Continuer)*.

Important :

- Saisissez le nom de la société tel qu'il apparaît sur votre relevé de compte.
- Saisissez votre limite de crédit sans signes de dollar, ni virgule ni décimale.

Verify Your Card

1

2

3

Card Number

471569*****0738

Company Name

?

Company Number

?

Credit Limit

?

ZIP / Postal Code

?

Continue

Cancel

5. Créez votre ID d'utilisateur, votre mot de passe et répondez à trois questions de sécurité. Ces informations seront utilisées pour vérifier votre identité. Cliquez sur *Continue (Continuer)*.
- L'ID d'utilisateur doit comporter au moins 7 caractères et au maximum 50 caractères.
 - Un mot de passe doit comporter au moins 12 caractères et au maximum 100 caractères, et inclure des caractères alphabétiques et numériques. Les mots de passe sont sensibles à la casse.

Create Your Account

1

2

3

Create a User ID

Create a Password

Confirm Password

Select and answer three security questions. These will be used to verify your identity.

Question 1

Answer 1

Question 2

Answer 2

Question 3

- Saisissez vos informations d'utilisateur (prénom, nom, adresse e-mail) et cliquez sur *Submit* (*Soumettre*).

Enter Your Information

1

2

3

First Name

Program

Middle Name

Optional

Last Name

Administrator

Employee ID

Optional


Email Address

programadministrator@bofa.com

Submit

Cancel

- Vous serez redirigé(e) vers la page de Global Card Access pour vous connecter avec les informations d'identification que vous venez de créer. Vous recevrez également un e-mail confirmant votre inscription.
- Acceptez les Conditions générales lors de votre prochaine connexion pour terminer votre inscription.

BANK OF AMERICA 

Global Card Access

Terms and Conditions

TERMS OF USE FOR BANK OF AMERICA GLOBAL CARD ACCESS WEBSITE

IMPORTANT! PLEASE READ THE FOLLOWING TERMS OF USE CAREFULLY.

By clicking the "Accept" button or Using the Network (as defined below), you:

- Agree to comply with these terms of use ("Terms of Use") for the Services (as defined below) and GCA Service website (the "Site").
- Agree that you may use the Service and the Site only if you have been expressly authorized to do so by the Client (as defined below).
- Acknowledge that you have read all of the terms set out in these Terms of Use (in particular, we draw your attention to the terms set out under "Disclaimer of Warranties and Limitations of Liability" and "General" below).
- Acknowledge that you are only being provided with the Service and the Site as an authorized user of the Client.
- Acknowledge that you are not being provided with the Services and the Site either as a consumer or with respect to any of your individual or personal accounts with the Bank (as defined below) or its affiliates.
- Agree to receive within this Site or through Alerts, the Terms of Use, all updates to the foregoing, and all disclosures, notices, alerts, and other communications regarding the Site.
- Acknowledge that these Terms of Use will only be provided to you once even if you Use the Site with respect to multiple card accounts, and you agree that you will be deemed to have entered into these Terms of Use separately with respect to each such card account.
- Agree, if you are resident in Canada, India or Singapore, to the collection, use and disclosure of your personal data and other data processing activities set out in the Privacy Notice for Canada, India and Singapore referenced below.
- Agree to us communicating with you through the methods of electronic transmission set forth in the terms and conditions below, including through electronic mail (e-mail) and text messaging services.
- Agree to us sending communications using an automatic telephone dialing system or an artificial or prerecorded voice system.

You can withdraw your consent to the Terms of Use by calling customer service through the telephone numbers provided in the Contact Us section within the Site. However, withdrawing your consent means you will no longer be able to access or otherwise Use the Site or the Services.

IF YOU DO NOT AGREE TO THE TERMS OF USE, YOU MUST NOT USE THE SITE OR THE NETWORK.

"Bank", "we", "our", or "us" means with respect to cards issued in (i) Australia, Bank of America, National Association acting through its Australia Branch; (ii) Austria, Belgium, Bulgaria, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Sweden, Switzerland, Spain, Turkey, or the United Kingdom, Bank of America Europe Designated Activity Company; (iii) Canada, Bank of America, National Association acting through its Canada Branch; (iii) Hong Kong, Bank of America, National Association acting through its Hong Kong Branch; (iv) India, Bank of America, National Association acting through its Mumbai Branch; (v) Singapore, Bank of America, National Association acting through its Singapore Branch; and (vi) United States, Bank of America, N.A.

"Card Agreement" means a, Card Services Agreement, or Commercial Card agreement, in either case, entered into by Client with the Bank.

"Client" means client that is a legal entity and that has entered into a Card Agreement with the Bank.

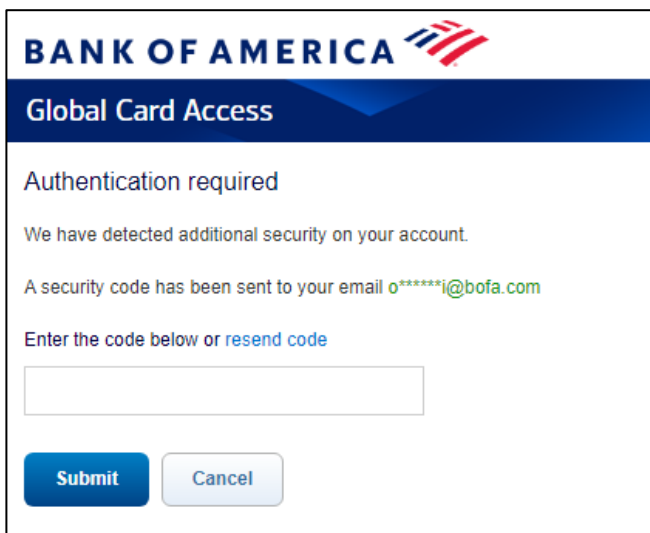
By choosing Accept, you agree to the terms and conditions. Choose Decline to cancel.

Accept

Decline

Se connecter à Global Card Access

Connectez-vous à Global Card Access via le lien suivant : bankofamerica.com/globalcardaccess. Après l'inscription, la connexion ultérieure à Global Card Access pour tous les utilisateurs nécessitera une authentification supplémentaire au moyen d'un code d'accès à usage unique (One-Time Passcode, OTP).



Important :

- L'OTP n'est valable que pour la session en cours et expire dans les 15 minutes suivant sa création. Un nouvel OTP sera nécessaire si la session en cours se termine en raison d'une inactivité.
- Le lien de renvoi de code vous permet de demander qu'un nouvel OTP vous soit envoyé par e-mail. Cela entraînera l'expiration de tous les codes d'accès en attente précédemment envoyés lors de la connexion. La saisie de plusieurs codes d'authentification expirés ou invalides consécutifs entraînera le verrouillage de votre compte.
- Pour les utilisateurs d'Amérique du Nord et de la région EMEA, un OTP par e-mail n'est présenté que lors de la première connexion à partir d'un appareil/navigateur particulier. Les utilisateurs pourront continuer à accéder à Global Card Access à partir du même appareil/navigateur et ne seront plus invités à fournir un OTP par e-mail, car cet appareil/navigateur sera désormais reconnu.
- Les utilisateurs de la région APAC recevront un OTP par e-mail à chaque connexion en raison des exigences réglementaires régionales.

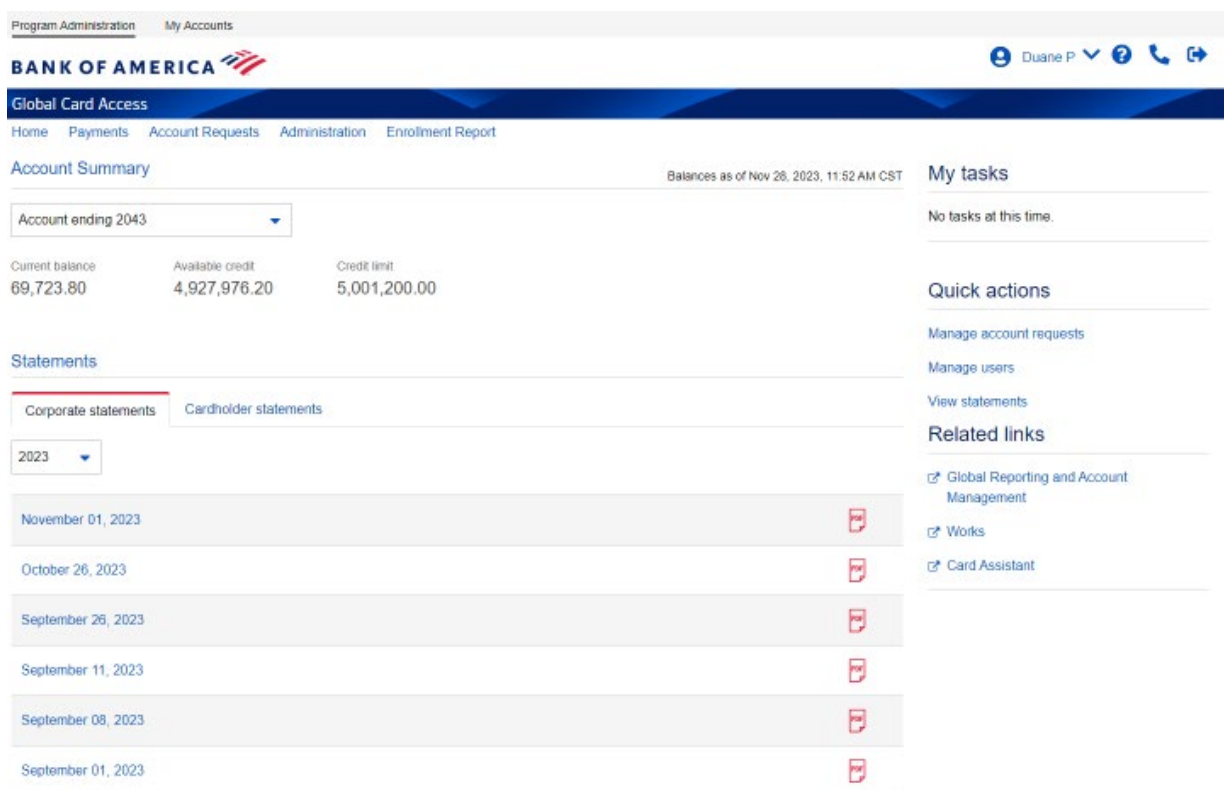
Si vous vous êtes inscrit(e) par vous-même pour un compte, vous utiliserez l'ID utilisateur et le mot de passe que vous avez créés lors de l'inscription pour vous connecter à Global Card Access.

Si votre rôle a été créé pour vous par un administrateur de programme de votre organisation ou par un utilisateur des services bancaires, vous recevrez un e-mail de la part de Global Card Access contenant votre ID d'utilisateur et un lien vous permettant de terminer l'inscription en définissant votre mot de passe et vos questions de sécurité. Vous pouvez modifier votre ID d'utilisateur à partir de votre profil en vous connectant à Global Card Access.

Tableau de bord Administration de programme

Depuis le tableau de bord du compte, vous pouvez consulter les détails des dépenses, les relevés de compte, la limite de crédit et la limite de crédit disponible, et effectuer des paiements pour vos comptes d'entreprise. Les liens suivants se trouvent également dans la barre de navigation de droite et permettent d'accéder rapidement et facilement aux fonctions les plus utilisées :

- My task (Mes tâches): zone de notification de tout élément en attente nécessitant une attention particulière (par exemple, expiration du mot de passe ou de la clé de demande de compte).
- Quick action (Actions rapides): les options répertoriées dans ce menu varient en fonction de la configuration de votre société et de la disponibilité dans chaque région.
 - Gérer les demandes de compte : accédez aux demandes de compte en attente d'approbation et consultez l'historique des demandes de compte.
 - Gérer les utilisateurs : consultez une liste complète des utilisateurs liés à votre société.
 - Consulter les relevés de compte : consultez les relevés de compte actuels et historiques de l'entreprise. Une notification par e-mail vous est envoyée lorsque votre relevé de compte est disponible pour consultation.
 - Card Rewards (Récompenses de carte) (États-Unis uniquement) : les comptes éligibles peuvent consulter le solde de points Premium Reward disponibles et accéder au site de récompenses pour échanger des points de récompense.
- Liens connexes
 - Rapports mondiaux et gestion des comptes : la page Rapports mondiaux et gestion des comptes s'affiche dans un nouvel onglet ou une nouvelle fenêtre de navigation.
 - Works : ouvre Works dans un nouvel onglet ou une nouvelle fenêtre de navigation.
 - Assistant de cartes : ouvre la page Assistant de cartes, votre centre de ressources sur les cartes commerciales, dans un nouvel onglet ou une nouvelle fenêtre de navigation.



The screenshot displays the Bank of America Global Card Access interface. At the top, there are navigation tabs for 'Program Administration' and 'My Accounts'. The main header includes the Bank of America logo and a user profile 'Duane P'. Below this, a 'Global Card Access' section contains links for 'Home', 'Payments', 'Account Requests', 'Administration', and 'Enrollment Report'. The 'Account Summary' section shows a dropdown for 'Account ending 2043' and a balance as of Nov 28, 2023, 11:52 AM CST. The summary table lists: Current balance (69,723.80), Available credit (4,927,976.20), and Credit limit (5,001,200.00). The 'Statements' section has tabs for 'Corporate statements' and 'Cardholder statements', with a dropdown for the year '2023'. A list of statement dates is shown: November 01, 2023; October 26, 2023; September 26, 2023; September 11, 2023; September 08, 2023; and September 01, 2023. On the right, a 'My tasks' section states 'No tasks at this time.' Below it, 'Quick actions' include 'Manage account requests', 'Manage users', and 'View statements'. 'Related links' include 'Global Reporting and Account Management', 'Works', and 'Card Assistant'.

Gestion des utilisateurs

En tant qu'administrateur de programme, vous pouvez consulter, créer, modifier et désactiver des utilisateurs, ainsi que réinitialiser leurs mots de passe.

Consulter les utilisateurs

1. Accédez à *Administration* → *Users (Utilisateurs)* en haut du tableau de bord Administration de programme ou à *Manage users (Gérer les utilisateurs)* dans le menu Quick action (Actions rapides).
2. Cela vous montrera une vue de tous les utilisateurs sous votre contrôle qui sont inscrits sur Global Card Access, ainsi que leur type de rôle.

Créer un utilisateur

1. Accédez à *Administration* → *Users (Utilisateurs)* en haut du tableau de bord Administration de programme ou à *Manage users (Gérer les utilisateurs)* dans le menu Quick action (Actions rapides).
2. Cliquez sur *Create (Créer)* dans le coin supérieur droit.
3. Sélectionnez *Create User (Créer un utilisateur)*.
4. Saisissez les détails de l'utilisateur : nom, identifiant de l'utilisateur, identifiant de l'employé(e) (facultatif) et adresse e-mail.
 - L'ID d'utilisateur doit comporter au moins 7 caractères et au maximum 50 caractères.
 - Vous pouvez personnaliser l'étiquette du champ en remplaçant l'identifiant de l'employé(e) par votre identifiant interne préféré (par exemple, le numéro de la personne). Reportez-vous à la section Personnaliser les demandes pour plus d'informations.
5. Cliquez sur *Save and continue (Enregistrer et continuer)*.

Home Account Requests Administration

/ Administration / Users / Create User

QL Test Company

Create new user

1. Enter user details

| | | | |
|-------------|---------------------------------------|---------------|---|
| First name | <input type="text" value="Alec"/> | User ID | <input type="text" value="alec_smith"/> |
| Middle name | <input type="text" value="optional"/> | Email address | <input type="text" value="customermail@works.com"/> |
| Last name | <input type="text" value="Smith"/> | Employee ID | <input type="text" value="optional"/> |

6. Attribuez les rôles souhaités au nouvel utilisateur. Les options de rôle sont les suivantes :

- Administrateur de programme : l'utilisateur disposera d'une autorisation administrative complète sur les comptes de facturation sélectionnés.
 - i. Cliquez sur *Add accounts (Ajouter des comptes)* pour attribuer des comptes pour lesquels l'utilisateur sera un administrateur de programme.
 - ii. Sélectionnez la case d'option correspondant au type d'administrateur de programme que vous souhaitez créer.
 1. La sélection de *All accounts (Global) (Tous les comptes [Mondiaux])* confère à l'utilisateur le rôle d'administrateur de programme mondial, ce qui lui confère des privilèges administratifs sur tous les comptes de facturation existants de votre société, ainsi que sur tous les comptes de facturation futurs.

Remarque : cette option peut ne pas être disponible en fonction de la configuration de votre société.

2. La sélection de *Select accounts (Scoped) (Comptes choisis [contrôlés])* confère à l'utilisateur le rôle d'administrateur de programme contrôlé, ce qui lui confère des privilèges administratifs sur un sous-ensemble des comptes de facturation de votre société. Utilisez les cases d'option pour désigner ces comptes spécifiques.
3. La sélection de *None (Aucun)* supprime le rôle d'administrateur de programme de l'utilisateur.

iii. Une fois votre sélection effectuée, cliquez sur *Add (Ajouter)*.

- Auditeur : l'utilisateur disposera d'autorisations en lecture seule sur les comptes de facturation sélectionnés.
 - i. Cliquez sur *Add accounts (Ajouter des comptes)* pour attribuer des comptes pour lesquels l'utilisateur sera un auditeur.
 - ii. Sélectionnez le bouton de radio correspondant au type d'auditeur que vous souhaitez créer.
 1. La sélection de *All accounts (Global) (Tous les comptes [Mondiaux])* confère à l'utilisateur le rôle d'auditeur mondial, ce qui lui permettra d'accéder en lecture seule à tous les comptes de facturation existants de votre société, ainsi qu'à tous les comptes de facturation futurs.

Remarque : cette option peut ne pas être disponible en fonction de la configuration de votre société.

2. La sélection de *Select accounts (Scoped)* (*Comptes choisis [contrôlés]*) confère à l'utilisateur le rôle d'auditeur contrôlé, ce qui lui permettra d'accéder en lecture seule à un sous-ensemble de comptes de facturation de votre société. Utilisez les cases d'option pour désigner ces comptes spécifiques.
3. La sélection de *None (Aucun)* supprime le rôle d'auditeur de l'utilisateur.

Important : un utilisateur ne peut pas être un administrateur de programme et un auditeur pour le même compte de facturation.

- Approbateur de demande de compte : si cela s'applique à votre programme, l'utilisateur pourra approuver les demandes de compte en ligne.
 - i. Cliquez sur *Add approval groups (Ajouter des groupes d'approbation)* pour ajouter les groupes pour lesquels cet utilisateur doit approuver les demandes.
 - Titulaire de carte : cet utilisateur est affecté au compte d'un autre titulaire de carte afin d'exécuter des fonctions en son nom, telles que la mise en place d'alertes, la vérification des relevés de compte, etc. Ce rôle est souvent attribué aux assistants de direction pour qu'ils exécutent des fonctions pour la carte de leur supérieur hiérarchique.
 - i. Cliquez sur *Add accounts (Ajouter des comptes)* pour ajouter des comptes pour lesquels l'utilisateur aura certaines autorisations.
7. Une fois l'attribution des rôles terminées, cliquez sur *Finish (Terminer)*. L'utilisateur recevra un e-mail de bienvenue de la part de Global Card Access avec son ID d'utilisateur et les étapes à suivre pour terminer son inscription.

Modifier les détails de l'utilisateur

1. Accédez à *Administration* → *Users (Utilisateurs)* en haut du tableau de bord Administration de programme ou à *Manage users (Gérer les utilisateurs)* dans le menu Quick action (Actions rapides).
2. Cliquez sur le nom de l'utilisateur souhaité et sélectionnez *View Full Details (Afficher tous les détails)*.

Administration / Users

Users Create Clear Filters

| User ID | Name | Program Administrator (Global) | Program Administrator (Scoped) | Group Approver | Cardholder | Proxy User | Global Auditor | Scoped Auditor | GRAM | Locked | Email Address | Last Login Date |
|---------------------|--------------|--------------------------------|--------------------------------|----------------|------------|------------|----------------|----------------|------|----------|------------------------------|----------------------|
| romainvyts | Wyts, Romain | | | | X | | | | | Unlocked | customermail@works.com | 2021-01-06 12:10 CST |
| cardholder2520 | 2520, card | | | | X | | | | | Unlocked | medikonda.keerthi@bofa.com | 2021-08-18 07:43 CDT |
| msEmailRegistration | 2520, mari | | | | X | | | | | Unlocked | m Spencer@bofa.com | |
| number_2520 | | | | | X | | | | | Unlocked | mutheswari.muthuraj@bofa.com | 2021-11-15 06:41 CST |
| mari2520B | | | | | X | | | | | Unlocked | m Spencer@bofa.com | 2021-06-30 09:22 CDT |
| ms2520cpv2.4533 | | | | | X | | | | | Unlocked | m Spencer@bofa.com | 2021-06-03 16:13 CDT |

Context menu for '2520, mari':

- View Full Details
- Reset Password
- Resend Welcome Email
- Deactivate User

3. Modifiez les champs disponibles comme vous le souhaitez et cliquez sur *Save (Enregistrer)*.
 - L'ID d'utilisateur doit comporter au moins 7 caractères et au maximum 50 caractères.
 - Supprimer l'e-mail d'approbation en attente : en cochant cette case, l'utilisateur peut choisir de ne pas recevoir un e-mail chaque fois qu'une demande de compte est soumise par un demandeur.
 - Ne pas inclure mon nom ou mon adresse e-mail dans les e-mails adressés aux demandeurs : en cochant cette case, le nom et l'adresse e-mail de l'utilisateur sont supprimés des e-mails adressés aux demandeurs.

Désactiver un utilisateur

1. Accédez à *Administration* → *Users (Utilisateurs)* en haut du tableau de bord Administration de programme ou à *Manage users (Gérer les utilisateurs)* dans le menu Quick action (Actions rapides).
2. Cliquez sur le nom de l'utilisateur souhaité et sélectionnez *Deactivate User (Désactiver l'utilisateur)*.
3. Cliquez sur *OK*. L'utilisateur ne pourra plus se connecter à Global Card Access.

Réinitialiser un mot de passe

1. Accédez à *Administration* → *Users (Utilisateurs)* en haut du tableau de bord Administration de programme ou à *Manage users (Gérer les utilisateurs)* dans le menu Quick action (Actions rapides).
2. Cliquez sur le nom de l'utilisateur souhaité et sélectionnez *Reset Password (Réinitialiser le mot de passe)*.
3. Cliquez sur *OK*. L'utilisateur recevra un e-mail contenant des instructions supplémentaires sur la manière de réinitialiser son mot de passe.

Renvoyer l'e-mail de bienvenue


1. Accédez à *Administration* → *Users (Utilisateurs)* en haut du tableau de bord Administration de programme ou à *Manage users (Gérer les utilisateurs)* dans le menu Quick action (Actions rapides).
2. Cliquez sur le nom de l'utilisateur souhaité et sélectionnez *Resend Welcome Email (Renvoyer l'e-mail de bienvenue)*.
3. Cliquez sur *OK*. L'utilisateur recevra un e-mail contenant des instructions supplémentaires sur la manière de réinitialiser son mot de passe et ses questions de sécurité.

Maintenance des comptes d'entreprise

1. Accédez à *Administration* → *Comptes d'entreprise* en haut du tableau de bord Administration de programme.
2. Cliquez sur le compte que vous souhaitez modifier et sélectionnez *View Full Details* (*Afficher tous les détails*).

Home / Administration / Corporate Accounts OL Test Company

Corporate Accounts [Clear Filters](#)

| Account name | Account last 4 | TSYS account ID | TSYS company number | Region | Eligible for account requests | Eligible for alerts |
|---|----------------|-----------------|---------------------|--------|-------------------------------|---------------------|
| APAC AUD CC 1500000 | 0766 | 80000001108 | 1500000 | APAC | X | |
|  View Full Details | 7759 | 80000014047 | 5800044 | EMEA | X | |

3. Modifiez les champs disponibles comme vous le souhaitez et cliquez sur *Save* (*Enregistrer*).
 - Le champ Embossed Name 2 (Nom en relief 2) est la valeur par défaut qui s'affiche sur les cartes émises pour les nouveaux demandeurs ; il s'agit généralement du nom de la société.
 - La suppression du code comptable masquera le champ Code comptable pour les administrateurs de programme dans les demandes de compte en ligne.
 - Sélectionnez la méthode d'approbation pour les demandes de compte. La sélection de Additional Approval – Online (Approbation supplémentaire – En ligne) permettra de créer des groupes d'approbation et des comités d'approbation pour examiner et approuver les demandes de compte en ligne, en plus de l'approbation de l'administrateur de programme.

Program Administration My Accounts

BANK OF AMERICA Olga Terezi

Global Card Access

Home Account Requests Administration

Home / Administration / Corporate Accounts / Corporate Account Details

EXPERIAN FILE TEST34

| | |
|------------------------------------|--|
| Account Name: EXPERIAN FILE TEST34 | Embossed Name 2 Default: EXPERIAN FILE TEST34 (1 - 21) |
| Account Last 4: 1086 | Suppress Accounting Code: <input type="radio"/> Yes <input checked="" type="radio"/> No |
| TSYS Company Number: 6600067 | Approval Method: Additional Approval - Online |
| HL1: 6600067 | Allow Cash: <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Region: US/Canada | Delivery Options: <input type="checkbox"/> Standard Post to the cardholder at the primary mailing address (5-10 business days) |
| Currency: U.S. DOLLAR | <input type="checkbox"/> Overnight/urgent delivery to the cardholder at the primary mailing address (A fee may apply.) |
| Enrolled in Alerts: No | <input type="checkbox"/> Ship to the Program Administrator using the company bulk ship address (2-6 business days) |

Save

- Pour ajouter un compte d'entreprise, sélectionnez *Add (Ajouter)* en bas à gauche de l'écran Corporate Accounts (Comptes d'entreprise) (comptes pour l'Amérique du Nord uniquement). La page d'enregistrement d'une nouvelle carte s'affiche.

Gestion des demandes de compte en ligne

Global Card Access permet à vos employés de demander de nouveaux comptes de carte en ligne. Vous devez fournir à vos employés une clé de demande de compte que vous générez pour que les demandes de carte en ligne puissent être soumises avec succès. En tant qu'administrateur de programme, vous pourrez créer et gérer les clés de demande de compte, et examiner et approuver les nouvelles demandes de comptes. Votre société doit être configurée pour cette fonctionnalité.

Créer des clés de demande de compte (tutoriel vidéo)

Vos employés utiliseront des clés de demande de compte pour demander des comptes en ligne. Chaque clé de demande de compte comporte des paramètres spécifiques qui régissent la configuration et la gestion du compte d'un(e) employé(e), comme le compte d'entreprise auquel le compte sera lié et le type de carte que le demandeur recevra en cas d'approbation.

Remarque : une fois qu'un compte a été demandé pour un compte d'entreprise ou un type de produit particulier, il ne peut plus être modifié. Si le demandeur a soumis une demande en utilisant une clé de demande de compte incorrecte pour le compte prévu, il doit soumettre une nouvelle demande.

- Accédez à *Account Requests (Demandes de compte) > Key Management (Gestion des clés)* en haut du tableau de bord Administration de programme.
- Cliquez sur le menu déroulant *Create (Créer)* en haut à droite et sélectionnez *Create Account Request Keys (Créer des clés de demande de compte)*.

| Global Card Access | | | | | | | | | | | |
|--|---|----------------|-----------|-----------------------------|-------------------------------|-----------------------|--------------------|----------------------|------------|-----------------|------------------------|
| Home Account Requests Administration Bank User | | | | | | | | | | | |
| / Account Requests / Key Management | | | | | | | | | | | |
| Account Request Keys | | | | | | | | | | | Create |
| Create Account Request Keys | | | | | | | | | | | |
| Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses |
| <input type="checkbox"/> | | | All | | | | | | | | |
| <input type="checkbox"/> Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-ix4-5zj | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a |
| <input type="checkbox"/> Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | jo0-0nm-5x4 | Alerts | PA Approval Only | | | 2020-12-16 | 2020-12-19 | 5 |
| <input type="checkbox"/> Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67j-q8l | MK | Single Group Approval | Group | 1,500.00 | 2020-09-22 | 2022-09-22 | 100 |
| <input type="checkbox"/> Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | MCHIP ADV AUD TRVL - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |
| <input type="checkbox"/> Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | EMEA key | PA Approval Only | | 2,500.00 | 2020-07-22 | 2022-07-22 | n/a |
| <input type="checkbox"/> Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-qu0 | MCHIP ADV SEK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |

Remarque : s'il existe plusieurs comptes d'entreprise, la fenêtre *Select Corporate Account(s) (Sélectionner le ou les comptes d'entreprise)* s'affiche. Sélectionnez un compte d'entreprise et cliquez sur *OK*.

- Complétez la page *Create Account Request Key(s) (Créer une ou des clés de demande de compte)*.

- a. Configurez votre clé de demande de compte dans la section *Settings (Paramètres)*.
 - i. Le champ *Key Nickname (Nom de la clé)* vous permet de donner un nom convivial à la clé.
 - ii. Les champs *Expiration Date (Date d'expiration)* sont facultatifs et vous permettent d'être averti(e) lorsque les clés arrivent presque à expiration.
 - b. Sélectionnez l'une des *Account Request Options (Options de demande de compte)* facultatives.
 - i. La sélection de *Display Employee ID (Afficher l'ID de l'employé[e])* vous oblige à définir une longueur minimale et maximale pour le champ Employee ID (ID de l'employé[e]). Vous pouvez également indiquer si l'ID de l'employé(e) est requis lorsqu'une demande de compte est soumise.
 - ii. La sélection de l'option *Suppress emails (Supprimer les e-mails)* empêche l'envoi d'e-mails liés à une demande de compte aux demandeurs.
 - iii. La sélection de l'option *Suppress Desired Credit Limit (Supprimer la limite de crédit souhaitée)* masque ce champ pour les demandeurs qui effectuent une demande de compte en ligne.
 - iv. La saisie d'un montant dans le champ *Default Credit Limit (Limite de crédit par défaut)* entraîne l'affichage par défaut du montant de la limite de crédit dans le formulaire de demande de compte destiné aux administrateurs de programme. Vous pouvez toujours modifier le montant de la limite de crédit avant d'approuver une demande, si nécessaire.
 - v. La sélection de *Require Manager Information (Exiger des informations relatives au responsable)* indique qu'un nom de responsable est requis lors de la soumission d'une demande de compte.
 - c. Sélectionnez l'une des *Approval Method Options (options de méthode d'approbation)*.
 - i. La sélection de *PA Approval Only (Approbation de l'AP uniquement)* transmet les demandes de compte directement à l'administrateur de programme pour approbation.
 - ii. La sélection de *Single Group Approval (Approbation d'un seul groupe)* permet de transmettre les demandes de compte aux membres du groupe d'approbation sélectionné pour qu'ils les approuvent avant de les transmettre à l'administrateur de programme. Cliquez sur l'outil de recherche pour sélectionner le nom d'un groupe d'approbation.
 - iii. La sélection de *Panel Approval (Approbation d'un comité)* transmet les demandes de compte aux groupes d'approbation dans l'ordre indiqué dans le comité avant d'être transférées à l'administrateur de programme. Cliquez sur l'outil de recherche pour sélectionner le nom d'un comité d'approbation.
4. Cliquez sur *Save (Enregistrer)*.

Create Account Request Key(s)

* Corporate Account:

Settings

* Number of Keys: (1 - 100)

Key Nickname:

A sequence number will be added to the key nickname when more than one key is requested.

* Start Date:

* Expiration Date:

☐ Limit number of uses to (1 - 10,000)

☐ Send key expiration reminder days before expiration

Account Request Options

☐ Display Employee ID
☐ Suppress emails to applicants
☐ Suppress Desired Credit Limit from applicants

Default Credit Limit:

(1234.00)

☐ Require Manager Information

Approval Method Options

Approval Options:

Désactiver ou modifier des clés de demande de compte

1. Accédez à *Account Requests (Demandes de compte)* > *Key Management (Gestion des clés)* en haut du tableau de bord Administration de programme.
2. Pour désactiver une clé de demande de compte, sélectionnez la clé de demande de compte que vous souhaitez désactiver, cliquez sur *Disable (Désactiver)*, puis sur *OK*.

Account Request Keys

Create

>>

Clear Filters

| | Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses | Remaining Number of Uses |
|-------------------------------------|--------|---|----------------|-----------|-----------------------------|------------------------------|------------------|--------------------|----------------------|------------|-----------------|------------------------|--------------------------|
| <input checked="" type="checkbox"/> | Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-jk4-5zj | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a | n/a |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | io0-0nm-5x4 | PA Approval Only | | | | 2020-12-16 | 2020-12-19 | 5 | 5 |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | kg6-ir5-177 | PA Approval Only | | | | 2020-12-16 | 2022-12-16 | n/a | n/a |
| <input type="checkbox"/> | Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67j-q8l | Approval Group | 1,500.00 | | 2020-09-22 | 2022-09-22 | 100 | 63 | |
| <input type="checkbox"/> | Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | PA Approval Only | | | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | PA Approval Only | 2,500.00 | | 2020-07-22 | 2022-07-22 | n/a | n/a | |
| <input type="checkbox"/> | Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-gu0 | MCHIP ADV SEK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV DKK COM | 6101 | EMEA | e7v-r4f-i1g | MCHIP ADV DKK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 2f2-o62-u4w | BROADCOM 5800044 NOK CC | PA Approval Only | | 100.00 | 2020-08-13 | 2022-08-13 | n/a | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 09c-b9e-f6s | Single Group Approval | test | | | 2020-10-01 | 2022-10-01 | n/a | n/a |

1 Selected | 41 items

Show10per page

Disable

Download

Confirm Account Request Key(s) Dis...

Disable 1 account request key(s).

OKCancel

- Pour modifier une clé de demande de compte, sélectionnez la clé de demande de compte souhaitée, modifiez les paramètres si nécessaire et cliquez sur *Save (Enregistrer)*.

Gérer les approbateurs

Dans le cadre de la configuration des demandes de compte en ligne, vous pouvez désigner des groupes ou des comités d'approbation. L'utilisation de groupes et de comités d'approbation permet à votre organisation d'exiger des approbations supplémentaires pour les demandes de compte en ligne. L'utilisation de l'approbation d'un seul groupe requiert l'approbation d'un approbateur du groupe d'approbation désigné. Une fois approuvée, la demande est transmise à l'administrateur de programme pour approbation finale. L'utilisation des comités d'approbation requiert l'approbation d'un approbateur de chacun des groupes d'approbation membres du comité d'approbation. Un maximum de deux groupes d'approbation peut être affecté à un comité. Un comité d'approbation utilise un ordre d'approbation défini, qui peut être modifié par l'administrateur de programme.

Créer des groupes d'approbation

1. Accédez à *Administration > Manage Approvers (Gérer les approbateurs)* en haut du tableau de bord Administration de programme.
2. Cliquez sur le menu déroulant *Create (Créer)* en haut à droite et sélectionnez *Create Approval Group (Créer un groupe d'approbation)*.
3. Saisissez un nom de groupe d'approbation et une description (facultatif), puis cliquez sur *Save (Enregistrer)*.
4. La fenêtre *Select User(s) (Sélectionner un ou plusieurs utilisateurs)* s'affiche. Cochez la case à côté de chaque utilisateur à ajouter et cliquez sur *OK*.

Global Card Access

Home Account Requests

/ Administration / Manage Approvers

Test 3

* Name: Test 3

Approvers Panels

Name

0 Selected | 0 items

Remove Selected Add Approver(s)

Select User(s)

Clear Filters

| | Last Name | First Name | User ID | Email Address |
|-------------------------------------|----------------------------|------------------------------|-----------------|---------------------------------|
| <input type="checkbox"/> | a<script>alert(1)</script> | a'><script>alert(3)</script> | qwerqwer | michael.ayer@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Priya | priya_grp | priyadharshini.sukumar@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Anusha | Anusha.Approver | anusha.kantu@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Friday | FridayApp | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr2 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr30 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | ApproverTest | Group | Group Approver | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Test | Test.Auditor | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Approver | ApprAud | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Auditor | Global | Global.Auditor1 | anusha.kantu@bofa.com |

3 Selected | 51 items Show 10 per page Page: 1 of 6

OK Cancel

Page: 1 of 0

5. Cliquez sur l'onglet *Keys (Clés)* pour attribuer des clés de demande de compte au groupe.
6. Cliquez sur *Add Key(s) (Ajouter une ou plusieurs clés)* et cochez la case à côté de chaque clé de demande de compte que vous souhaitez ajouter.
7. Cliquez sur *OK*.

| | Account Request Key | Key Nickname | Corporate Account | Account Last 4 | Region | Status |
|-------------------------------------|---------------------|-------------------------|-------------------------|----------------|-----------|--------|
| <input checked="" type="checkbox"/> | 2f2-o62-u4w | BROADCOM 5800044 NOK CC | BROADCOM 5800044 NOK CC | 7759 | EMEA | Active |
| <input type="checkbox"/> | kq6-ir5-177 | | EXPERIAN FILE TEST34 | 1086 | US/Canada | Active |

1 Selected | 2 items Show 10 per page Page: 1 of 1 OK Cancel

Modifier des groupes d'approbation

1. Accédez à *Administration > Manage Approvers (Gérer les approbateurs)* en haut du tableau de bord Administration de programme.
2. Cliquez sur un nom de groupe particulier.
3. Pour supprimer un approbateur, cochez la case à côté du nom de l'approbateur, cliquez sur *Remove Selected (Supprimer la sélection)* et cliquez sur *OK*.
4. Pour supprimer des clés de demande de compte, cliquez sur l'onglet *Keys (Clés)*, cochez la case à côté de chaque clé de demande de compte à supprimer, cliquez sur *Remove (Supprimer)* puis sur *OK*.
5. Pour modifier le nom ou la description d'un groupe, modifiez le texte dans le champ *Name (Nom)* et *Description*, et cliquez sur *Save (Enregistrer)*.
6. Pour télécharger les informations relatives à un groupe d'approbation, cochez la case de chaque groupe, cliquez sur *Download (Télécharger)*, sélectionnez une option de format et suivez les instructions pour enregistrer ou ouvrir le fichier.
7. Pour supprimer un groupe d'approbation, cochez la case correspondant au nom du groupe à supprimer et cliquez sur *Delete (Supprimer)* puis sur *OK*.

Remarque : en cas de suppression, les demandes de compte seront transférées à l'administrateur ou aux administrateurs du programme.

Créer des comités d'approbation

1. Accédez à *Administration > Manage Approvers (Gérer les approbateurs)* en haut du tableau de bord Administration de programme.
2. Cliquez sur le menu déroulant *Create (Créer)* en haut à droite et sélectionnez *Create Approval Panel (Créer un comité d'approbation)*.
3. Saisissez un nom de comité d'approbation et une description (facultatif), puis cliquez sur *Save (Enregistrer)*.
4. Cliquez sur *Add Approval Group (Ajouter un groupe d'approbation)* pour ajouter des groupes au comité.
Remarque : un maximum de deux groupes d'approbation peut être attribué à un comité.

5. Cliquez sur *Save (Enregistrer)*.
8. Cliquez sur *Add Key(s) (Ajouter une ou plusieurs clés)* et cochez la case à côté de chaque clé de demande de compte que vous souhaitez ajouter.
6. Cliquez sur *OK*.

Modifier des comités d'approbation

1. Accédez à *Administration > Manage Approvers (Gérer les approbateurs)* en haut du tableau de bord Administration de programme.
2. Cliquez sur l'onglet *Panels (Comités)*, puis sélectionnez le nom du comité que vous souhaitez modifier.
3. Pour supprimer un groupe d'approbation, cliquez sur le X à côté du nom du groupe d'approbation et cliquez sur *Save (Enregistrer)*.
4. Pour modifier l'ordre des groupes d'approbation, cliquez sur le menu déroulant *Approval Order (Ordre d'approbation)*, sélectionnez une option de numérotation pour chaque groupe, puis cliquez sur *Save (Enregistrer)*.
5. Pour ajouter une clé de demande de compte, cliquez sur *Add Key(s) (Ajouter une ou plusieurs clés)*. Cochez la case de chaque clé de demande de compte à ajouter au comité et cliquez sur *OK*.
6. Pour supprimer une clé de demande de compte, cochez la case à côté de chaque clé de demande de compte à supprimer, cliquez sur *Remove (Supprimer)* puis sur *OK*.

7. Pour modifier le nom ou la description d'un comité, modifiez le texte dans le champ *Name (Nom)* et *Description*, et cliquez sur *Save (Enregistrer)*.
8. Pour télécharger les informations relatives à un comité d'approbation, cochez la case de chaque comité, cliquez sur *Download (Télécharger)*, sélectionnez une option de format et suivez les instructions pour enregistrer ou ouvrir le fichier.
9. Pour supprimer un comité d'approbation, cochez la case correspondant au nom du comité à supprimer et cliquez sur *Delete (Supprimer)* puis sur *OK*.
Remarque : en cas de suppression, les demandes de compte seront transférées à l'administrateur ou aux administrateurs du programme.

Compléter et approuver des demandes de compte (tutoriel vidéo)

1. Accédez à *Account Requests (Demandes de compte)* > *Approvals – Program Administrator (Approbations – Administrateur de programme)* en haut du tableau de bord Administration de programme ou à *Manage account requests (Gérer les demandes de compte)* dans le menu Quick actions (Actions rapides).

[Home](#)
[Account Requests](#)
[Administration](#)

[Home](#) / [Account Requests](#) / [Approvals - Program Administrator](#)

Account Requests - Program Administrator

Awaiting Approval

Submitted Requests

Completed Requests

Errors 1

Clear Filters

| | Applicant | Embossed Name 1 | Corporate Account | Submitted | Account Request Key | Account Request ID |
|-----------------------|--------------------|-----------------|---|----------------------|-----------------------------|--------------------|
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:29 CST | 7j1-67j-q8l | 244624 |
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:28 CST | 7j1-67j-q8l | 244623 |
| <input type="radio"/> | Smith, Joey | JOEY SMITH | WORKS 8594079 T JOHNSON | 2020-12-09 17:48 CST | ra1-jj1-6ux | 244613 |
| <input type="radio"/> | sample, test | TESTING | WORKS TEST CC 8705504 | 2020-11-16 00:49 CST | 7j1-67j-q8l | 244572 |
| <input type="radio"/> | Corner, Lex | TOKENTEST | MCHIP ADV CHF COM | 2020-11-11 07:22 CST | yo2-oo9-jt9 | 244571 |

2. Sélectionnez la case d'options à côté de la demande de compte souhaitée et cliquez sur *Complete & Approve (Terminer et approuver)*.
3. Vérifiez les informations de la demande de carte et modifiez les détails du compte, si nécessaire.

Remarque : vous devez vérifier que l'adresse saisie est correcte pour garantir la livraison de la carte.

4. Une fois votre examen et/ou vos modifications terminés, cliquez sur *Approve (Approuver)* pour approuver la demande ou sur *Reject (Rejeter)* pour rejeter la demande.

Remarque :

- Les demandeurs reçoivent un e-mail confirmant l'approbation ou le rejet de la demande de compte, sauf si la clé de demande de compte a été définie sur *Suppress emails to applicants (Supprimer les e-mails adressés aux demandeurs)*.
- Si la demande de compte est rejetée, l'employé(e) doit créer une nouvelle demande de compte si nécessaire.

- En tant qu'administrateur de programme, vous pouvez contourner une demande particulière qui nécessite une approbation de groupe en allant dans l'onglet *Submitted Requests (Demandes soumises)*, en cochant la case à côté du demandeur et en cliquant sur *Bypass (Contourner)*. Vous devrez fournir un commentaire pour justifier le contournement.

Gestion des erreurs de demande de compte (États-Unis uniquement)

Pour les programmes aux États-Unis, les administrateurs de programme peuvent résoudre les erreurs d'adresse identifiées dans les demandes de compte. Les erreurs d'adresse consistent en une non-concordance entre l'État et le code postal fournis dans une demande de compte. Cette fonctionnalité n'est disponible que pour les programmes aux États-Unis.

- Accédez à *Account Requests (Demandes de compte) > Approvals – Program Administrator (Approbations – Administrateur de programme)* en haut du tableau de bord Administration de programme ou à *Manage account requests (Gérer les demandes de compte)* dans le menu Quick actions (Actions rapides).
- Cliquez sur l'onglet *Errors (Erreurs)*.

Remarque : un numéro s'affiche dans l'onglet Errors (Erreurs) lorsque des erreurs d'adresse de demande de compte ont été identifiées.

- Sélectionnez la case d'option à côté du demandeur souhaité.
- Cliquez sur *Correct & Resubmit (Corriger et soumettre à nouveau)*.

The screenshot shows the 'Account Requests - Program Administrator' interface. The 'Errors' tab is active, displaying a table with the following data:

| Applicant | Error | Embossed Name 1 | Errors Account | Submitted | Account Request Key | Account Request ID | Approved By | Approved Date |
|-------------------|----------------------|------------------|---------------------------------------|----------------------|-----------------------------|--------------------|-------------|----------------------|
| Creation, Request | View | REQUEST CREATION | WORKS TEST CC 8705504 | 2020-11-11 06:25 CST | 711-671-981 | 244570 | GPA, Anusha | 2020-11-11 06:26 CST |

At the bottom of the interface, there are two buttons: 'Reject' and 'Correct & Resubmit'. The 'Correct & Resubmit' button is highlighted with a red box.

- Modifiez l'État et/ou le code postal dans la section Adresse si nécessaire.
- Cliquez sur *Resubmit (Soumettre à nouveau)*. La demande passe alors de la file d'attente *Errors (Erreurs)* à la file d'attente *Completed Requests (Demandes terminées)*.

Consulter et télécharger des demandes de compte terminées

1. Accédez à *Account Requests (Demandes de compte) > Approvals – Program Administrator (Approbations – Administrateur de programme)* en haut du tableau de bord Administration de programme ou à *Manage account requests (Gérer les demandes de compte)* dans le menu Quick actions (Actions rapides).
2. Cliquez sur l'onglet *Completed Requests (Demandes terminées)*.
3. Sélectionnez le demandeur dont vous souhaitez consulter la demande et cliquez sur *View Full Details (Afficher tous les détails)*.
4. Cochez la case à côté de chaque demande de compte que vous souhaitez télécharger.
5. Cliquez sur *Download (Télécharger)*.
6. Sélectionnez le format de téléchargement et suivez les instructions pour enregistrer ou ouvrir le fichier.

Personnaliser les demandes

Vous pouvez personnaliser les demandes de cartes en ajoutant une notification qui s'affichera pour les demandeurs en haut du formulaire de demande de compte ou en personnalisant l'identifiant interne demandé aux demandeurs au cours de la procédure de demande de carte en ligne.

Notifications

1. Accédez à *Administration → Customize Application (Personnaliser la demande)* en haut du tableau de bord Administration de programme.
2. Si vous avez déjà configuré des notifications, vous les verrez apparaître dans cette vue. Si vous souhaitez ajouter une nouvelle notification, cliquez sur le menu déroulant *Create (Créer)* dans le coin supérieur droit.
3. Cliquez sur *Create Notification (Créer une notification)*.

| | | | | | |
|--|-----------------|-----------------------------|-------------|----------------------|-----------------|
| Home Account Requests Administration | | | | | |
| / Administration / Customize Application | | | | | |
| QL Test Company | | | | | |
| Customize Application | | | | | |
| Create | | | | | |
| Notifications Field Customization | | | | | |
| Create Notification | | | | | |
| | Notification ID | Corporate Account | Updated By | Updated | Expiration Date |
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | 187 | APAC AUD CC 1500000 | M, Abhishek | 2020-09-09 12:39 CDT | n/a |
| <input type="checkbox"/> | 186 | WORKS CAD 8594073 T JOHNSON | M, Abhishek | 2020-09-09 12:38 CDT | n/a |

4. Si vous avez le contrôle de plusieurs comptes d'entreprise, vous devrez sélectionner le compte d'entreprise auquel vous souhaitez ajouter la notification. Après avoir sélectionné le compte d'entreprise, cliquez sur *OK*.
5. Saisissez le texte de la notification que vous souhaitez dans la zone de texte *Notification* et sélectionnez une date d'expiration pour le message (facultatif).

Administration / Customize Application / Notifications / Create Notification

Create Notification

* Corporate Account: LC GCA PROJECT

* Notification: Applications will be reviewed and approved within 3-5 business days. (2000 Max Limit)

Expiration Date: ☒ Do not expire ☐

6. Cliquez sur *Save (Enregistrer)*.
7. Vous pouvez modifier les notifications que vous créez à tout moment en cliquant sur *Notification ID (ID de notification)*. Pour supprimer une notification, cochez la case à côté de Notification ID (ID de notification) et cliquez sur *Expire Now (Arrêter maintenant)*, puis sur *OK*.

Personnalisation des champs

1. Accédez à *Administration* → *Customize Application (Personnaliser la demande)* en haut du tableau de bord Administration de programme.
2. Cliquez sur l'onglet *Field Customization (Personnalisation des champs)*.
3. Le champ Identifiant de l'employé(e) standard pour les demandes de carte est l'identifiant de l'employé(e). Si vous souhaitez remplacer le libellé de ce champ par un autre type d'identifiant interne, saisissez dans la zone de texte *English (Anglais)* le nouveau libellé que vous souhaitez afficher pour les demandeurs pour les demandes de carte en ligne.

Remarque : le libellé de champ ID de l'employé(e) peut contenir jusqu'à 30 caractères.

Home Account Requests Administration

Administration / Customize Application

Customize Application Create

Notifications Field Customization

| Field label to customize | English | French | German | Italian | Spanish |
|--------------------------|---------------|--------------------------|----------------|---------------------------|-----------------|
| Employee ID | Person Number | Identifiant de l'employé | Mitarbeiter-ID | Identificativo dipendente | ID del empleado |

Save

4. Saisissez la valeur traduite du nouveau libellé de champ en français, en allemand, en italien et en espagnol.

5. Cliquez sur *Save (Enregistrer)*.

Rapport sur l'inscription des utilisateurs

Les administrateurs de programme peuvent voir quels utilisateurs individuels sont ou ne sont pas inscrits à Global Card Access.

1. Accédez à *Enrollment Report (Rapport sur l'inscription)* en haut du tableau de bord Administration du programme.
2. Le rapport sur l'inscription s'affiche avec tous les comptes de carte qui se trouvent sous votre contrôle.
 - a. Un filtre est disponible au-dessus de chaque colonne pour faciliter la recherche.
 - b. Pour filtrer sur la base d'un ou de plusieurs comptes d'entreprise, utilisez le filtre avancé sur le côté gauche.
 - c. Si le titulaire de la carte n'a pas enregistré sa carte dans Global Card Access, le nom d'utilisateur apparaîtra comme « Pas d'utilisateur associé ».

Program Administration

My Accounts

BANK OF AMERICA

srijani gp

Global Card Access

Home

Account Requests

Administration

Enrollment Report

Enrollment Report

Clear Filters

Advanced Filter

Corporate Account - All

Search

Reset

| | User Name | Name on Card | Account Last 4 | Corporate Account | Card Status |
|--------------------------|----------------|--------------|----------------|---------------------------|-------------|
| <input type="checkbox"/> | | | | | Active |
| <input type="checkbox"/> | 0105, GodProxy | WILLIAM GOAT | 5800 | EXPERIAN FILE TEST34-1005 | Active |
| <input type="checkbox"/> | 1, proxy | DELETE TEST | 4322 | AUTOM CC 6600948 #1-0435 | Active |
| <input type="checkbox"/> | 1, proxy | TONI HODSON | 7374 | EXPERIAN FILE TEST34-1005 | Active |
| <input type="checkbox"/> | 1086, Proxy | | 7911 | EXPERIAN FILE TEST34-1005 | Active |
| <input type="checkbox"/> | 2, proxy | 2520CARD | 2893 | PINCHECK SEK-8422 | Active |
| <input type="checkbox"/> | 2520, check | | 8350 | PINCHECK SEK-8422 | Active |

3. Pour télécharger le rapport sur l'inscription, cochez la case de chaque compte que vous souhaitez afficher dans le rapport et cliquez sur Download (Télécharger).
4. Sélectionnez le format de téléchargement et suivez les instructions pour enregistrer ou ouvrir le fichier.

Mon compte

Global Card Access permet aux administrateurs d'accéder à leurs propres comptes de carte individuels via l'onglet My Accounts (Mes comptes).

The screenshot shows the 'My Accounts' section of the Bank of America Global Card Access interface. At the top, there are navigation links for 'Program Administration' and 'My Accounts'. The user is logged in as 'Chris Test'. The main heading is 'Global Card Access'. Below this, there are tabs for 'Home', 'Administration', and 'Enrollment Report'. The 'Account Summary' section shows a dropdown menu with 'US LC CERT CORP - 1717' selected. To the right, it says 'Balances as of Oct 25, 2022, 10:32 AM CDT'. Below the dropdown, there is a table with account details:

| | | | |
|---------------------------|-----------------|--------------|------------------|
| Payment due date | Current balance | Credit limit | Available credit |
| Jan 27, 2023 | 195.00 | 60.00 | 0.00 |
| Balance on last statement | Last payment | | |
| 195.00 | 9.23 | | |

On the right side, there is a 'My tasks' section with the message 'No tasks at this time.' Below that is a 'Quick actions' section with links for 'Manage users', 'View statements', and 'Make a payment'. At the bottom right, there is a 'Card rewards' section with a link to 'Redeem reward points' and a display of 'Reward points: 10,346 pts'.

- Pour ajouter un compte à votre profil Global Card Access existant, fusionner plusieurs comptes dans Global Card Access ou modifier votre profil dans Global Card Access, consultez la section [Comment gérer votre compte dans Global Card Access](#).
- Pour consulter votre code PIN, consultez la section [Comment utiliser votre carte à puce et votre code PIN](#).
- Pour modifier votre code PIN, consultez la section [Comment modifier votre code PIN dans Global Card Access](#).
- Pour configurer des alertes, consultez la section [Comment configurer des alertes dans Global Card Access](#).
- Pour consulter vos relevés de compte, consultez la section [Comment consulter votre relevé de compte dans Global Card Access](#).
- Pour verrouiller/déverrouiller votre carte, consultez la section [Comment verrouiller et déverrouiller votre carte dans Global Card Access](#).
- Pour effectuer un paiement, consultez la section [Instructions de paiement du titulaire de carte](#) (Amérique du Nord uniquement).
- Pour en savoir plus sur l'authentification forte des clients (Strong Customer Authentication, SCA), consultez la section [site Web SCA](#) (région EMEA uniquement).
- Pour plus d'informations sur l'assistance de compte, les types de récompenses disponibles et l'utilisation des points, consultez la section [FAQ Premium Rewards](#) (États-Unis uniquement).

Global Card Access (Italiano)

Guida utente globale – Amministratori del programma

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Introduzione

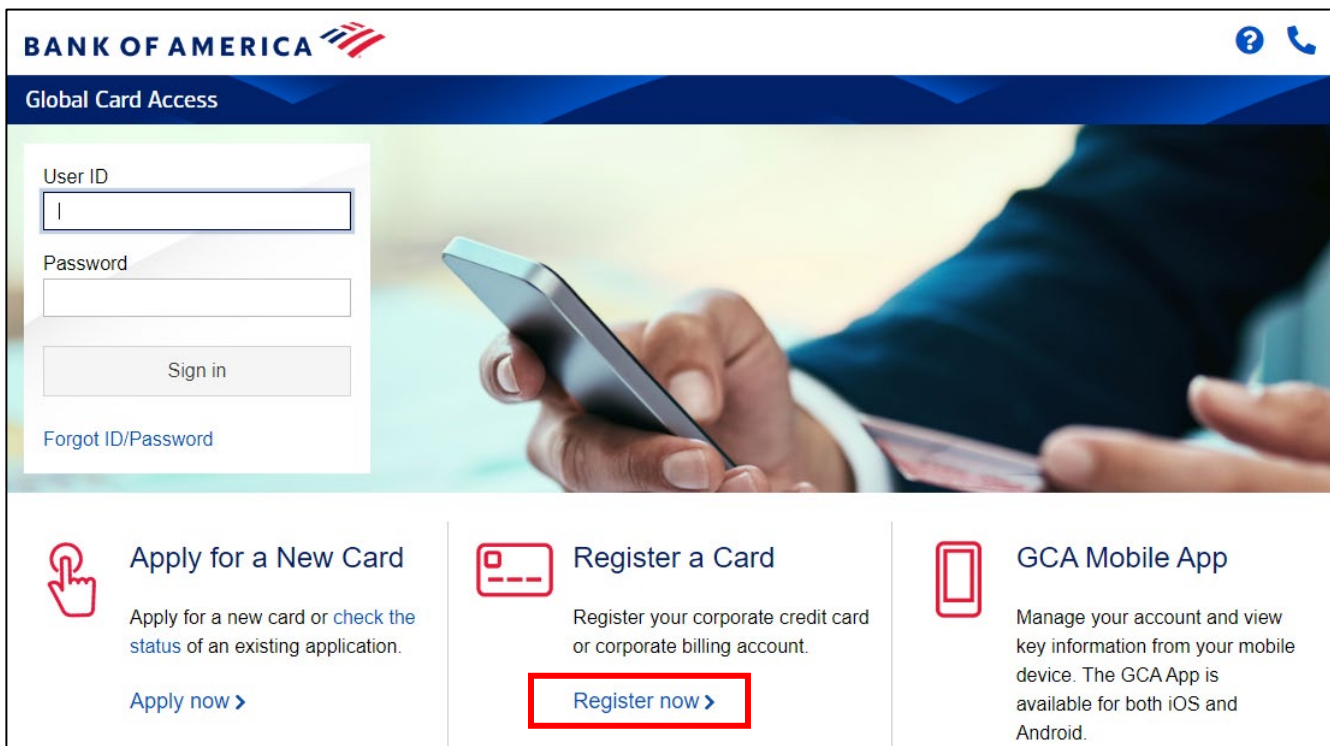
Global Card Access è uno strumento di gestione delle carte online che dà accesso a Lei e ai Suoi titolari di carta alle informazioni sulle Sue carte aziendali quando, dove e come necessario. In qualità di Amministratore del programma, sarà possibile visualizzare la dashboard globale del proprio conto, gestire i titolari di carta, approvare le richieste di nuovi conti online, effettuare pagamenti¹ e visualizzare i propri estratti conto. I titolari di carta avranno accesso a funzionalità come la verifica del limite di credito, il saldo e il credito disponibile, oltre a visualizzare/modificare il PIN, bloccare la carta, gestire gli avvisi, accedere agli estratti conto ed effettuare pagamenti² per maggiore comodità e sicurezza.

Prima registrazione per conti aziendali

Un Amministratore del programma che gestisce il programma di carte aziendali in Nord America di un'azienda può registrarsi a Global Card Access utilizzando il numero di conto di fatturazione dell'azienda. Gli Amministratori del programma che gestiscono i conti aziendali EMEA e APAC devono contattare Card Digital Services per registrarsi a Global Card Access. Tutti i titolari di carta, a livello globale, possono registrare automaticamente il proprio conto su Global Card Access.

Per registrarsi come nuovo utente per un conto aziendale, procedere come segue:

1. Visitare il sito Web di Global Card Access all'indirizzo <https://www.bankofamerica.com/globalcardaccess>.
2. Nella schermata di accesso di Global Card Access, fare clic su *Registrati ora*.



BANK OF AMERICA


Global Card Access


User ID


Password

Sign in

[Forgot ID/Password](#)

 **Apply for a New Card**
Apply for a new card or [check the status](#) of an existing application.
[Apply now >](#)

 **Register a Card**
Register your corporate credit card or corporate billing account.
[Register now >](#)

 **GCA Mobile App**
Manage your account and view key information from your mobile device. The GCA App is available for both iOS and Android.

3. Inserire il numero di conto di fatturazione dell'azienda e fare clic su *Continua*.

New User Registration

Enter your corporate card number or your company's billing account number.

ContinueCancel

4. Inserire le informazioni sul conto (nome e numero dell'azienda, limite di credito, CAP), quindi fare clic su *Continua*.

Importante:

- Inserire il nome dell'azienda esattamente come appare sull'estratto conto.
- Inserire il limite di credito senza simboli di dollari, virgole o decimali.

Verify Your Card

1

2

3

Card Number
471569*****0738

Company Name
 ?

Company Number
 ?

Credit Limit
 ?

ZIP / Postal Code
 ?

ContinueCancel

5. Crei il Suo ID utente, la password e risponda a tre domande di sicurezza. Queste informazioni saranno usate per verificare la Sua identità. Faccia clic su *Continua*.
- Un ID utente deve contenere un minimo di 7 ed un massimo di 50 caratteri.
 - Una password deve essere compresa tra un minimo di 12 e un massimo di 100 caratteri e deve includere caratteri alfabetici e numerici. Le password rilevano la differenza fra maiuscole e minuscole.

Create Your Account

1

2

3

Create a User ID

Create a Password

Confirm Password

Select and answer three security questions. These will be used to verify your identity.

Question 1

Answer 1

Question 2

Answer 2

Question 3

6. Inserire le proprie informazioni utente (nome, cognome, indirizzo e-mail) e fare clic su *Invia*.

Enter Your Information

1

2

3

First Name

Program

Middle Name

Optional

Last Name

Administrator

Employee ID

Optional

Email Address

programadministrator@bofa.com

Submit

Cancel

7. Si sarà indirizzati alla pagina di Global Card Access per accedere con le credenziali utente appena create. Riceverà anche un'e-mail di conferma della Sua iscrizione.
8. Accettare i Termini e condizioni all'accesso successivo per completare la registrazione.

BANK OF AMERICA

Global Card Access

Terms and Conditions

TERMS OF USE FOR BANK OF AMERICA GLOBAL CARD ACCESS WEBSITE

IMPORTANT! PLEASE READ THE FOLLOWING TERMS OF USE CAREFULLY.

By clicking the "Accept" button or Using the Network (as defined below), you:

1. Agree to comply with these terms of use ("Terms of Use") for the Services (as defined below) and GCA Service website (the "Site").

2. Agree that you may use the Service and the Site only if you have been expressly authorized to do so by the Client (as defined below).

3. Acknowledge that you have read all of the terms set out in these Terms of Use (in particular, we draw your attention to the terms set out under "Disclaimer of Warranties and Limitations of Liability" and "General" below).

4. Acknowledge that you are only being provided with the Service and the Site as an authorized user of the Client.

5. Acknowledge that you are not being provided with the Services and the Site either as a consumer or with respect to any of your individual or personal accounts with the Bank (as defined below) or its affiliates.

6. Agree to receive within this Site or through Alerts, the Terms of Use, all updates to the foregoing, and all disclosures, notices, alerts, and other communications regarding the Site.

7. Acknowledge that these Terms of Use will only be provided to you once even if you Use the Site with respect to multiple card accounts, and you agree that you will be deemed to have entered into these Terms of Use separately with respect to each such card account.

8. Agree, if you are resident in Canada, India or Singapore, to the collection, use and disclosure of your personal data and other data processing activities set out in the Privacy Notice for Canada, India and Singapore referenced below.

9. Agree to us communicating with you through the methods of electronic transmission set forth in the terms and conditions below, including through electronic mail (e-mail) and text messaging services.

10. Agree to us sending communications using an automatic telephone dialing system or an artificial or prerecorded voice system.

You can withdraw your consent to the Terms of Use by calling customer service through the telephone numbers provided in the Contact Us section within the Site. However, withdrawing your consent means you will no longer be able to access or otherwise Use the Site or the Services.

IF YOU DO NOT AGREE TO THE TERMS OF USE, YOU MUST NOT USE THE SITE OR THE NETWORK.

"Bank", "we", "our", or "us" means with respect to cards issued in (i) Australia, Bank of America, National Association acting through its Australia Branch; (ii) Austria, Belgium, Bulgaria, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Sweden, Switzerland, Spain, Turkey, or the United Kingdom, Bank of America Europe Designated Activity Company; (iii) Canada, Bank of America, National Association acting through its Canada Branch; (iii) Hong Kong, Bank of America, National Association acting through its Hong Kong Branch; (iv) India, Bank of America, National Association acting through its Mumbai Branch; (v) Singapore, Bank of America, National Association acting through its Singapore Branch; and (vi) United States, Bank of America, N.A.

"Card Agreement" means a, Card Services Agreement, or Commercial Card agreement, in either case, entered into by Client with the Bank.

"Client" means client that is a legal entity and that has entered into a Card Agreement with the Bank.

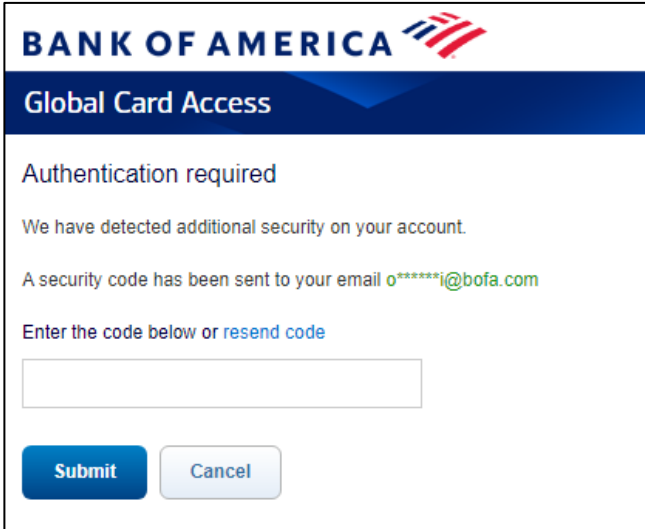
By choosing Accept, you agree to the terms and conditions. Choose Decline to cancel.

Accept

Decline

Accedere a Global Card Access

Accedi a Global Card Access facendo clic su seguente link: bankofamerica.com/globalcardaccess. Dopo la registrazione, il successivo accesso a Global Card Access per tutti gli utenti richiederà un'autenticazione aggiuntiva tramite un One-Time Passcode (OTP).



Importante:

- L'OTP è valido solo per la sessione corrente e scade entro 15 minuti dal momento della generazione. Se la sessione corrente termina a causa di inattività, sarà necessario un nuovo OTP.
- Il link di reinvio del codice consente di richiedere che un nuovo OTP monouso sia inviato nuovamente per e-mail. Ciò causerà la scadenza dei passcode in sospeso precedentemente inviati durante l'accesso. Voci token multiple, consecutive scadute o non valide causeranno il blocco dell'account.
- Per gli utenti del Nord America e EMEA, un OTP per e-mail è visualizzato solo al primo accesso da un particolare dispositivo/browser. Gli utenti possono continuare ad accedere a Global Card Access dallo stesso dispositivo/browser e successivamente non verrà richiesto di inviare un OTP per e-mail poiché il suddetto è ora un dispositivo riconosciuto.
- Gli utenti APAC riceveranno un OTP per e-mail a ogni accesso a causa dei requisiti normativi regionali.

Se ci si è registrati automaticamente per un conto, si userà l'ID utente e la password creati al momento della registrazione per accedere a Global Card Access.

Se il ruolo è stato creato da un Amministratore del programma nella propria organizzazione o da un utente di Assistenza bancaria, si riceverà un'e-mail da Global Card Access contenente il proprio ID utente e un link per completare la registrazione attraverso l'impostazione della password e delle domande di sicurezza. È possibile modificare l'ID utente nel proprio profilo al momento dell'accesso a Global Card Access.

Dashboard di amministrazione programma

Nella dashboard del conto, è possibile visualizzare i dettagli di spesa, gli estratti conto, il limite di credito e il limite di credito disponibile, oltre che effettuare pagamenti per i conti aziendali. Nella barra di navigazione a destra si trovano inoltre i seguenti link, che forniscono un rapido e facile accesso alle funzioni comunemente utilizzate:

- Le mie attività: area di notifica di eventuali elementi in sospeso che richiedono attenzione (ad es. scadenza della password o scadenza della chiave di richiesta del conto).
- Azioni rapide: le opzioni elencate in questo menu variano a seconda della configurazione dell'azienda e della disponibilità per regione.
 - Gestisci richieste sul conto: accedere alle richieste sul conto in attesa di approvazione e visualizzare la loro cronologia.
 - Gestisci utenti: visualizzare un elenco completo degli utenti correlati alla propria azienda.
 - Visualizza estratti conto: visualizzare estratti conto aziendali attuali e storici. Quando gli estratti sono disponibili per la visualizzazione, viene inviata una notifica via e-mail.
 - Premi carta (solo per gli USA): i conti aventi diritto possono visualizzare il saldo dei punti Premium Reward disponibili e accedere al sito dei premi per riscattare i punti premio.
- Link correlati
 - Global Reporting and Account Management: visualizza la reportistica globale e la gestione del conto in una nuova scheda o finestra del browser.
 - Attività: apre Attività in una nuova scheda o finestra del browser.
 - Card Assistant: apre Card Assistant, il centro risorse della carta aziendale, in una nuova scheda o finestra del browser.

The screenshot displays the 'Program Administration' dashboard for Bank of America. At the top, there are tabs for 'Program Administration' and 'My Accounts'. The main header includes the Bank of America logo and a user profile 'Duane P.' with various icons. Below the header, a navigation bar lists 'Home', 'Payments', 'Account Requests', 'Administration', and 'Enrollment Report'. The 'Account Summary' section shows a dropdown for 'Account ending 2043' and a table with current balance, available credit, and credit limit. The 'Statements' section has tabs for 'Corporate statements' and 'Cardholder statements', with a dropdown for the year '2023'. A list of statement dates is shown, each with a download icon. The right sidebar contains 'My tasks' (No tasks at this time), 'Quick actions' (Manage account requests, Manage users, View statements), and 'Related links' (Global Reporting and Account Management, Works, Card Assistant).

| Balances as of Nov 28, 2023, 11:52 AM CST | | |
|---|------------------|--------------|
| Current balance | Available credit | Credit limit |
| 69,723.80 | 4,927,976.20 | 5,001,200.00 |

| Statement Date | Action |
|--------------------|----------|
| November 01, 2023 | Download |
| October 26, 2023 | Download |
| September 26, 2023 | Download |
| September 11, 2023 | Download |
| September 08, 2023 | Download |
| September 01, 2023 | Download |

Gestione utenti

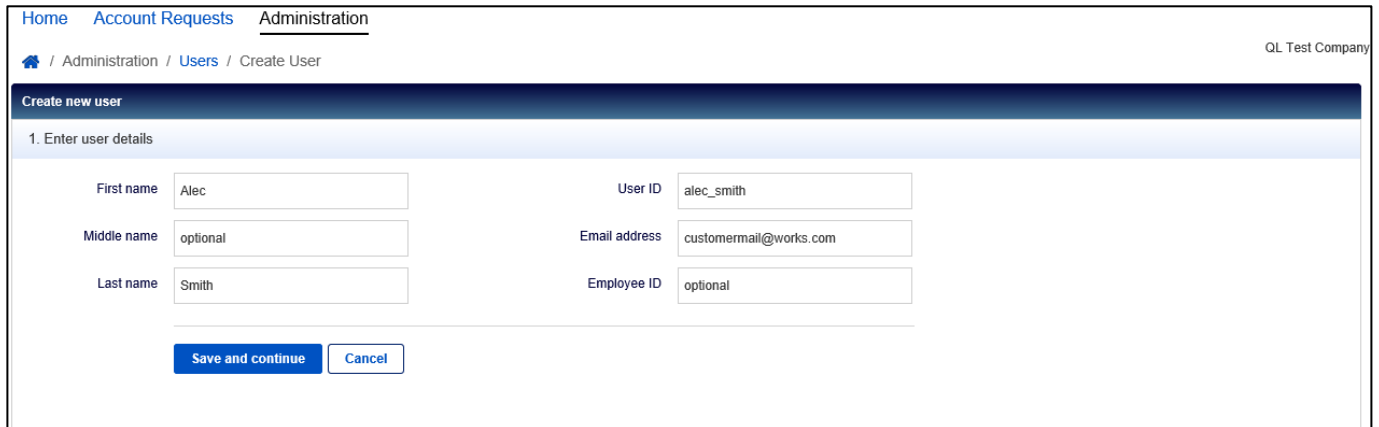
In qualità di Amministratore del programma, è possibile visualizzare, creare, modificare e disattivare gli utenti, nonché reimpostare le loro password.

Visualizzazione degli utenti

1. Andare a *Amministrazione* → *Utenti* in alto nella Dashboard di amministrazione del programma o *Gestisci utenti* nel menu Azioni rapide.
2. Tale operazione mostrerà una vista di tutti gli utenti all'interno del proprio ambito che sono registrati a Global Card Access, insieme al loro tipo di ruolo.

Creazione di un utente

1. Andare a *Amministrazione* → *Utenti* in alto nella Dashboard di amministrazione del programma o *Gestisci utenti* nel menu Azioni rapide.
2. Fare clic su *Crea* nell'angolo in alto a destra.
3. Selezionare *Crea utente*.
4. Immettere i dettagli utente: nome, ID utente, ID dipendente (facoltativo) e indirizzo e-mail.
 - Un ID utente deve contenere un minimo di 7 ed un massimo di 50 caratteri.
 - È possibile personalizzare l'etichetta del campo dall'ID dipendente all'identificatore interno preferito (ad es., Numero della persona). Per ulteriori informazioni, consultare la sezione Personalizza richieste.
5. Fare clic su *Salva e continua*.



The screenshot shows the 'Create new user' form within the Bank of America administration interface. The breadcrumb trail at the top reads: Home / Account Requests / Administration / Users / Create User. The form is titled 'Create new user' and has a sub-header '1. Enter user details'. It contains several input fields: 'First name' (Alec), 'Middle name' (optional), 'Last name' (Smith), 'User ID' (alec_smith), 'Email address' (customermail@works.com), and 'Employee ID' (optional). At the bottom of the form are two buttons: 'Save and continue' and 'Cancel'.

6. Assegnare i ruoli desiderati al nuovo utente. Le opzioni sul ruolo sono:
 - Amministratore del programma: l'utente disporrà dell'autorizzazione amministrativa completa per i conti di fatturazione selezionati.
 - i. Fare clic su *Aggiungi conti* per assegnare conti per i quali l'utente sarà un Amministratore del programma.
 - ii. Selezionare il pulsante di opzione per il tipo di Amministratore del programma che si desidera creare.
 1. Selezionando *Tutti i conti (Globale)* l'utente avrà il ruolo di Amministratore del programma globale, in cui avrà privilegi amministrativi su tutti i conti di fatturazione esistenti della società, nonché su eventuali conti di fatturazione futuri.

Nota: questa opzione potrebbe non essere disponibile in base alla configurazione dell'azienda.

2. Selezionando *Seleziona conti (Ambito)* l'utente avrà il ruolo di Amministratore del programma di un ambito, dove avrà privilegi amministrativi su un sottoinsieme dei conti di fatturazione della propria azienda. Utilizzare i pulsanti di opzione per designare questi conti specifici.
 3. Selezionando *Nessuno* si rimuove il ruolo di Amministratore del programma dall'utente.
- iii. Una volta effettuata la selezione, fare clic su *Aggiungi*.
- Revisore: l'utente disporrà di autorizzazioni di sola lettura sui conti di fatturazione selezionati.
 - i. Fare clic su *Aggiungi conti* per assegnare conti per i quali l'utente sarà un Revisore.
 - ii. Selezionare il pulsante di opzione per il tipo di Revisore che si desidera creare.
 1. Selezionando *Tutti i conti (Globale)* l'utente avrà il ruolo di Revisore globale, in cui avrà permessi di sola lettura su tutti i conti di fatturazione della società, nonché su eventuali conti di fatturazione futuri.

Nota: questa opzione potrebbe non essere disponibile in base alla configurazione dell'azienda.
 2. Selezionando *Seleziona conti (Ambito)* l'utente avrà il ruolo di Revisore di un ambito, dove avrà permessi di sola lettura su un sottoinsieme dei conti di fatturazione della propria azienda. Utilizzare i pulsanti di opzione per designare questi conti specifici.
 3. Selezionando *Nessuno*, il ruolo Revisore viene rimosso dall'utente.

Importante: un utente non può essere un Amministratore del programma e un Revisore per lo stesso conto di fatturazione.

- Approvatore delle richieste di conti: se applicabile al programma, l'utente sarà in grado di approvare le richieste di conti online.
 - i. Fare clic su *Aggiungi gruppi di approvazione* per aggiungere i gruppi per i quali l'utente deve approvare le richieste.
 - Intestatario della carta: questo utente viene assegnato al conto carta di un altro titolare di carta per svolgere funzioni per suo conto, come la configurazione di avvisi, il controllo degli estratti conto, ecc. Questo ruolo viene spesso assegnato agli Assistenti esecutivi per svolgere funzioni per la carta del loro manager.
 - i. Fare clic su *Aggiungi conto* per aggiungere conti su cui l'utente avrà determinate autorizzazioni.
7. Una volta completata l'assegnazione del ruolo, fare clic su *Fine*. L'utente riceverà un'e-mail di benvenuto da Global Card Access contenente il suo ID utente e i passaggi per completare la registrazione.

Modifica dei dettagli dell'utente

1. Andare a *Amministrazione* → *Utenti* in alto nella Dashboard di amministrazione del programma o *Gestisci utenti* nel menu Azioni rapide.
2. Fare clic sul nome dell'utente desiderato e selezionare *Visualizza dettagli completi*.

Administration / Users

Users Create ▼

Clear Filters

| User ID | Name | Program Administrator (Global) | Program Administrator (Scoped) | Group Approver | Cardholder | Proxy User | Global Auditor | Scoped Auditor | GRAM | Locked | Email Address | Last Login Date |
|---------------------|--------------|--------------------------------|--------------------------------|----------------|------------|------------|----------------|----------------|------|----------|------------------------------|----------------------|
| romainvyts | Wyts, Romain | | | | X | | | | | Unlocked | customermail@works.com | 2021-01-06 12:10 CST |
| cardholder2520 | 2520, card | | | | X | | | | | Unlocked | medikonda.keerthi@bofa.com | 2021-08-18 07:43 CDT |
| msEmailRegistration | 2520 mari | | | | X | | | | | Unlocked | msspencer@bofa.com | |
| number_2520 | | | | | X | | | | | Unlocked | mutheswari.muthuraj@bofa.com | 2021-11-15 06:41 CST |
| mari2520B | | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-30 09:22 CDT |
| ms2520cpv2.4533 | | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-03 16:13 CDT |

View Full Details
Reset Password
Resend Welcome Email
Deactivate User

3. Modificare i campi disponibili come desiderato e fare clic su *Salva*.
 - Un ID utente deve contenere un minimo di 7 ed un massimo di 50 caratteri.
 - Elimina e-mail in attesa di approvazione: selezionando questa casella l'utente può scegliere di non ricevere un'e-mail ogni volta che viene inviata una richiesta di conto.
 - Non includere il mio nome o indirizzo e-mail nelle e-mail al richiedente: selezionando questa casella di controllo si eliminano il nome e l'indirizzo e-mail dell'utente nelle e-mail ai richiedenti.

Disattivazione di un utente

1. Andare a *Amministrazione* → *Utenti* in alto nella Dashboard di amministrazione del programma o *Gestisci utenti* nel menu Azioni rapide.
2. Fare clic sul nome dell'utente desiderato e selezionare *Disattiva utente*.
3. Fare clic su *OK*. L'utente non potrà più accedere a Global Card Access.

Reimpostazione di una password

1. Andare a *Amministrazione* → *Utenti* in alto nella Dashboard di amministrazione del programma o *Gestisci utenti* nel menu Azioni rapide.
2. Fare clic sul nome dell'utente desiderato e selezionare *Reimposta password*.
3. Fare clic su *OK*. All'utente verrà inviata un'e-mail contenente ulteriori istruzioni su come reimpostare correttamente la password.

Invia nuovamente l'e-mail di benvenuto


1. Andare a *Amministrazione* → *Utenti* in alto nella Dashboard di amministrazione del programma o *Gestisci utenti* nel menu Azioni rapide.
2. Fare clic sul nome dell'utente desiderato e selezionare *Reinvia e-mail di benvenuto*.
3. Fare clic su *OK*. All'utente verrà inviata un'e-mail contenente ulteriori istruzioni su come reimpostare correttamente la password e le domande di sicurezza.

Manutenzione del conto aziendale

1. Andare su *Amministrazione* → *Conti aziendali* in alto nella Dashboard di amministrazione del programma.
2. Fare clic sull'account che si desidera modificare e selezionare *Visualizza dettagli completi*.

Administration / Corporate Accounts QL Test Company

Corporate Accounts Clear Filters

| Account name | Account last 4 | TSYS account ID | TSYS company number | Region | Eligible for account requests | Eligible for alerts |
|---|----------------|-----------------|---------------------|--------|-------------------------------|---------------------|
| APAC AUD CC 1500000 | 0766 | 80000001108 | 1500000 | APAC | X | |
|  View Full Details | 7759 | 80000014047 | 5800044 | EMEA | X | |

3. Modificare i campi come desiderato e fare clic su *Salva*.

- Nome stampigliato 2 è il valore predefinito che verrà visualizzato sulle carte emesse ai nuovi richiedenti; di solito è il nome dell'azienda.
- La soppressione del codice contabile nasconderà il campo Codice contabile agli Amministratori del programma nelle richieste di conti online.
- Selezionare il metodo di approvazione per le richieste di conti. Selezionando Approvazione aggiuntiva - Online sarà possibile impostare Gruppi di approvazione e Pannelli di approvazione per rivedere e approvare le richieste di conti online oltre all'approvazione dell'Amministratore del programma.

Program Administration My Accounts

BANK OF AMERICA Olga Terezi

Global Card Access

Home Account Requests Administration

Administration / Corporate Accounts / Corporate Account Details

EXPERIAN FILE TEST34

| | |
|------------------------------------|--|
| Account Name: EXPERIAN FILE TEST34 | Embossed Name 2 Default: EXPERIAN FILE TEST34 (1 - 21) |
| Account Last 4: 1086 | Suppress Accounting Code: <input type="radio"/> Yes <input checked="" type="radio"/> No |
| TSYS Company Number: 6600067 | Approval Method: Additional Approval - Online |
| HL1: 6600067 | Allow Cash: <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Region: US/Canada | Delivery Options: <input type="checkbox"/> Standard Post to the cardholder at the primary mailing address (5-10 business days) |
| Currency: U.S. DOLLAR | <input type="checkbox"/> Overnight/urgent delivery to the cardholder at the primary mailing address (A fee may apply.) |
| Enrolled in Alerts: No | <input type="checkbox"/> Ship to the Program Administrator using the company bulk ship address (2-5 business days) |

Save

4. Per aggiungere un conto aziendale, selezionare *Aggiungi* nella parte inferiore sinistra della schermata Conti aziendali (solo per i conti di Nord America). Verrà visualizzata la pagina Nuova registrazione carta.

Gestione delle richieste di conti online

Global Card Access consente ai dipendenti di richiedere nuovi conti carta online. È necessario fornire ai dipendenti una Chiave di richiesta conto che si genera affinché le richieste di carte online siano inviate correttamente. In qualità di Amministratore del programma, è possibile creare e gestire le Chiavi di richiesta conti e rivedere e approvare le richieste di nuovi conti. Per questa funzione è necessario configurare la Sua azienda.

Creazione di chiavi di richiesta conti (Tutorial video)

I Suoi dipendenti utilizzeranno le Chiavi di richiesta conti per richiedere conti online. Ogni Chiave di richiesta conto ha impostazioni specifiche che regolano il modo in cui il conto di un dipendente viene configurato e gestito, come il Conto aziendale a cui sarà collegato un conto e il tipo di carta che il richiedente riceverà previa approvazione.

Nota: Una volta richiesto un conto per un particolare Conyo aziendale o tipo di prodotto, il suddetto non potrà essere modificato. Se il richiedente ha inviato una richiesta utilizzando una Chiave di richiesta conto errata per il conto previsto, dovrà inviare una nuova richiesta.

1. Andare su *Richieste conti > Gestione chiavi* in alto nella Dashboard di amministrazione del programma.
2. Fare clic sul menu a discesa *Crea* nell'angolo in alto a destra e selezionare *Crea chiavi di richiesta conti*.

Global Card Access

Home

Account Requests

Administration

Bank User

/ Account Requests / Key Management

Account Request Keys

Create

>>

Create Account Request Keys

| | Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses |
|--------------------------|--------|---|----------------------|-----------|-----------------------------|-------------------------------|-----------------------|--------------------|----------------------|------------|-----------------|------------------------|
| <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | All | <input type="text"/> | <input type="text"/> | | | | | | |
| <input type="checkbox"/> | Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-ix4-5zi | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | io0-0nm-5x4 | Alerts | PA Approval Only | | | 2020-12-16 | 2020-12-19 | 5 |
| <input type="checkbox"/> | Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67j-q8l | MK | Single Group Approval | Group | 1,500.00 | 2020-09-22 | 2022-09-22 | 100 |
| <input type="checkbox"/> | Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | MCHIP ADV AUD TRVL - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |
| <input type="checkbox"/> | Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | EMEA key | PA Approval Only | | 2,500.00 | 2020-07-22 | 2022-07-22 | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-gu0 | MCHIP ADV SEK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |

Nota: Se sono presenti diversi conti aziendali, viene visualizzata la finestra *Seleziona conto/i aziendale/i*. Selezionare un conto aziendale e fare clic su *OK*.

3. Compilare la pagina *Crea chiave/i di richiesta conto/i*.
 - a. Configurare la Chiave di richiesta conto nella sezione *Impostazioni*.
 - i. Il *Soprannome della chiave* consente di assegnare un nome intuitivo alla chiave.
 - ii. I campi all'interno di *Data di scadenza* sono opzionali e forniscono avvisi quando le chiavi stanno per scadere.
 - b. Selezionare una delle *Apzioni di richiesta conto* facoltative.

- i. Selezionando *Visualizza ID dipendente* è necessario impostare una lunghezza minima e massima per il campo ID dipendente. È anche possibile indicare se l'ID dipendente è necessaria quando viene inviata una richiesta di conto.
 - ii. Selezionando l'opzione *Elimina e-mail* tutte le e-mail relative alle richieste di conti non potranno essere inviate ai richiedenti.
 - iii. Selezionando l'opzione *Elimina limite di credito desiderato*, questo campo viene nascosto ai richiedenti che completano una richiesta di conto online.
 - iv. L'inserimento di un importo nel campo *Limite di credito predefinito* determina l'impostazione predefinita dell'importo Limite di credito nel modulo Richiesta conto per gli Amministratori del programma. È comunque possibile modificare l'importo del Limite di credito prima di approvare una richiesta, se necessario.
 - v. La selezione di *Richiedi informazioni sul manager* indica che è necessario un Nome di manager quando viene inviata una richiesta di conto.
 - c. Selezionare una delle *Opzioni del metodo di approvazione* .
 - i. Selezionando *Solo approvazione PA* le richieste di conti vengono indirizzate direttamente all'Amministratore del programma per l'approvazione.
 - ii. Selezionando *Approvazione gruppo singolo*, le richieste di conto vengono instradate ai membri del Gruppo di approvazione selezionato per l'approvazione prima di essere inoltrate all'Amministratore del programma. Fare clic sullo strumento di ricerca per selezionare il nome di un Gruppo di approvazione.
 - iii. Selezionando *Approvazione pannello*, le richieste di conti vengono instradate ai Gruppi di approvazione nell'ordine indicato nel Pannello prima di essere inoltrate all'Amministratore del programma. Fare clic sullo strumento di ricerca per selezionare il nome di un Pannello di approvazione.
4. Fare clic su *Salva*.

Create Account Request Key(s)

* Corporate Account:

Settings

* Number of Keys: (1 - 100)

Key Nickname: A sequence number will be added to the key nickname when more than one key is requested.

* Start Date:

* Expiration Date:

☐ Limit number of uses to (1 - 10,000)

☐ Send key expiration reminder days before expiration

Account Request Options

☐ Display Employee ID

☐ Suppress emails to applicants

☐ Suppress Desired Credit Limit from applicants

Default Credit Limit: (1234.00)

☐ Require Manager Information

Approval Method Options

Approval Options:

Disattivazione o modifica delle chiavi di richiesta conti

1. Andare su *Richieste conti* > *Gestione chiavi* in alto nella Dashboard di amministrazione del programma.
2. Per disabilitare una Chiave di richiesta conto, selezionare la chiave che si desidera disattivare, fare clic su *Disabilita*, quindi fare clic su *OK*.

| Account Request Keys Create | | | | | | | | | | | | |
|--|-------------------|---|--------|---------------------|-----------------------------|------------------------------|-----------------------|----------------------|------------|-----------------|------------------------|--------------------------|
| Clear Filters | | | | | | | | | | | | |
| Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses | Remaining Number of Uses |
| <input checked="" type="checkbox"/> | Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-jk4-5zj | MK-US | PA Approval Only | | 2020-12-16 | 2022-12-16 | n/a | n/a |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | io0-0nm-5x4 | Alaska | PA Approval Only | | 2020-12-16 | 2020-12-19 | 5 | 5 |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | kg6-ir5-177 | Alaska | Only | | 2020-12-16 | 2022-12-16 | n/a | n/a |
| <input type="checkbox"/> | Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67j-q8l | Alaska | Approval Group | 1,500.00 | 2020-09-22 | 2022-09-22 | 100 | 63 |
| <input type="checkbox"/> | Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | Alaska | Only | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | Alaska | Only | 2,500.00 | 2020-07-22 | 2022-07-22 | n/a | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-gu0 | MCHIP ADV SEK COM - Test Key | PA Approval Only | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV DKK COM | 6101 | EMEA | e7v-r4f-i1g | MCHIP ADV DKK COM - Test Key | PA Approval Only | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 2f2-o62-u4w | BROADCOM 5800044 NOK CC | PA Approval Only | 100.00 | 2020-08-13 | 2022-08-13 | n/a | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 09c-b9e-f6s | BROADCOM 5800044 NOK CC | Single Group Approval | test | 2020-10-01 | 2022-10-01 | n/a | n/a |

1 Selected | 41 items

Show 10 per page

Page: 1 of 5

Disable

Download

- Per modificare una Chiave di richiesta conto, selezionare la chiave desiderata, modificare i parametri secondo necessità e fare clic su *Salva*.

Gestisci approvatori

Come parte della configurazione della richiesta di conti online, è possibile designare Gruppi o Pannelli di approvazione. L'utilizzo di Gruppi e Pannelli di approvazione consente all'organizzazione di richiedere approvazioni aggiuntive per le richieste di conti online. L'utilizzo di una singola Approvazione di gruppo richiede l'approvazione di un approvatore del Gruppo di approvazione designato. Una volta approvata, la richiesta viene inoltrata all'Amministratore del programma per l'approvazione finale. L'utilizzo di Pannelli di approvazione richiede l'approvazione di un approvatore di ciascuno dei Gruppi di approvazione che sono membri del Pannello di approvazione. È possibile assegnare un massimo di due Gruppi di approvazione a un pannello. Un Pannello di approvazione utilizza un ordine di approvazione impostato, che può essere modificato dall'Amministratore del programma.

Creazione di Gruppi di approvazione

1. Andare su *Amministrazione > Gestisci approvatori* in alto nella Dashboard di amministrazione del programma.
2. Fare clic sul menu a discesa *Crea* nell'angolo in alto a destra e selezionare *Crea Gruppo di approvazione*.
3. Immettere un Nome e una descrizione del Gruppo di approvazione (facoltativo) e fare clic su *Salva*.
4. Viene visualizzata la finestra *Seleziona utente/i*. Selezionare la casella di controllo accanto a ciascun utente da aggiungere e fare clic su *OK*.

Global Card Access

Home Account Requests

/ Administration / Manage App

Test 3

* Name: Test 3

Approvers Panels

Name

Select User(s)

Clear Filters

| | Last Name | First Name | User ID | Email Address |
|-------------------------------------|----------------------------|------------------------------|-----------------|---------------------------------|
| <input type="checkbox"/> | | | | |
| <input type="checkbox"/> | a<script>alert(1)</script> | a'><script>alert(3)</script> | qwerqwer | michael.ayer@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Priya | priya_grp | priyadharshini.sukumar@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Anusha | Anusha Approver | anusha.kantu@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Friday | FridayApp | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr2 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr30 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | ApproverTest | Group | Group Approver | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Test | Test.Auditor | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Approver | ApprAud | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Auditor | Global | Global.Auditor1 | anusha.kantu@bofa.com |

3 Selected | 51 items

Show 10 per page

Page: 1 of 6

OK Cancel

0 Selected | 0 items

Remove Selected Add Approver(s)

QL Test Company

Clear Filters

Last Login Date

Page: 1 of 0

5. Fare clic sulla scheda *Chiavi* per assegnare le Chiavi di richiesta conti al gruppo.
6. Fare clic su *Aggiungi chiave/i* e fare clic sulla casella di controllo accanto a ogni Chiave di richiesta conto che si desidera aggiungere.
7. Fare clic su *OK*.

| | Account Request Key | Key Nickname | Corporate Account | Account Last 4 | Region | Status |
|-------------------------------------|---------------------|-------------------------|-------------------------|----------------|-----------|--------|
| <input checked="" type="checkbox"/> | 2f2-o62-u4w | BROADCOM 5800044 NOK CC | BROADCOM 5800044 NOK CC | 7759 | EMEA | Active |
| <input type="checkbox"/> | kq6-ir5-177 | | EXPERIAN FILE TEST34 | 1086 | US/Canada | Active |

1 Selected | 2 items Show 10 per page Page: 1 of 1 OK Cancel

Modifica dei Gruppi di approvazione

1. Andare su *Amministrazione > Gestisci approvatori* in alto nella Dashboard di amministrazione del programma.
2. Fare clic su un nome di gruppo particolare.
3. Per rimuovere un approvatore, selezionare la casella di controllo accanto al nome del suddetto, fare clic su *Rimuovi selezionati* e successivamente su *OK*.
4. Per rimuovere le Chiavi di richiesta conti, fare clic sulla scheda *Chiavi*, selezionare la casella di controllo accanto a ciascuna Chiave di richiesta conto da rimuovere, fare clic su *Rimuovi* e successivamente su *OK*.
5. Per modificare il nome o la descrizione di un gruppo, modificare il testo nei campi *Nome* e *Descrizione* e fare clic su *Salva*.
6. Per scaricare le informazioni sul Gruppo di approvazione, selezionare la casella di controllo per ciascun gruppo, fare clic su *Scarica*, selezionare un'opzione di formato e seguire le istruzioni per salvare o aprire il file.
7. Per eliminare un Gruppo di approvazione, selezionare la casella di controllo del nome del gruppo da eliminare e fare clic su *Elimina*, seguito da *OK*.

Nota: Al momento dell'eliminazione, le richieste di conti verranno indirizzate all'Amministratore o agli Amministratori del programma.

Creazione di Pannelli di approvazione

1. Andare su *Amministrazione > Gestisci approvatori* in alto nella Dashboard di amministrazione del programma.
 2. Fare clic sul menu a discesa *Crea* nell'angolo in alto a destra e selezionare *Crea Pannello di approvazione*.
 3. Immettere un Nome e una descrizione del Pannello di approvazione (facoltativo) e fare clic su *Salva*.
 4. Fare clic su *Aggiungi Gruppo di approvazione* per aggiungere gruppi al pannello.
- Nota:* È possibile assegnare un massimo di due Gruppi di approvazione a un pannello.

Home Account Requests Administration

/ Administration / Manage Approvers / Groups and Panels / Panel Details

Panel 3

* Name:

Description:

Approval Groups

| Approval Order | Name | Description |
|--|------|-------------|
| There are no approval groups assigned to this panel. | | |

[+ Add Approval Group](#)

[Save](#)

5. Fare clic su *Salva*.
8. Fare clic su *Aggiungi chiavi* nella sezione Chiavi assegnate e fare clic sulla casella di controllo accanto a ogni Chiave di richiesta conto che si desidera aggiungere.
6. Fare clic su *OK*.

Modifica di Pannelli di approvazione

1. Andare su *Amministrazione > Gestisci approvatori* in alto nella Dashboard di amministrazione del programma.
2. Fare clic sulla scheda *Pannelli*, quindi selezionare il nome del pannello specifico che si desidera modificare.
3. Per rimuovere un gruppo di approvazione, fare clic sulla X accanto al nome del gruppo da eliminare e fare clic su *Salva*.
4. Per modificare l'ordine dei gruppi di approvazione, fare clic sul menu a discesa Ordine di approvazione, selezionare un'opzione numerica per ciascun gruppo e fare clic su *Salva*.
5. Per aggiungere una Chiave di richiesta conto, fare clic su *Aggiungi chiave/i*. Selezionare la casella di controllo per ogni Chiave di richiesta conto da aggiungere al pannello e fare clic su *OK*.
6. Per rimuovere una Chiave di richiesta conto, selezionare la casella di controllo accanto a ciascuna Chiave di richiesta conto da rimuovere, fare clic su *Rimuovi* e successivamente su *OK*.
7. Per modificare il nome o la descrizione di un pannello, modificare il testo nei campi *Nome* e *Descrizione* come necessario e fare clic su *Salva*.
8. Per scaricare le informazioni sul Pannello di approvazione, selezionare la casella di controllo per ciascun pannello, fare clic su *Scarica*, selezionare un'opzione di formato e seguire le istruzioni per salvare o aprire il file.

9. Per eliminare un Pannello di approvazione, selezionare la casella di controllo del nome del pannello da eliminare e fare clic su *Elimina*, seguito da *OK*.

Nota: Al momento dell'eliminazione, le richieste di conti verranno indirizzate all'Amministratore o agli Amministratori del programma.

Completamento e approvazione delle richieste di account (Video tutorial)

1. Andare a *Richieste di conti > Approvazioni – Amministratore del programma* in alto nella Dashboard di amministrazione del programma o *Gestisci richieste conti* nel menu Azioni rapide.

[Home](#)
[Account Requests](#)
[Administration](#)

[Home](#) / [Account Requests](#) / [Approvals - Program Administrator](#)

Account Requests - Program Administrator

Awaiting Approval

Submitted Requests

Completed Requests

Errors 1

Clear Filters

| | Applicant | Embossed Name 1 | Corporate Account | Submitted | Account Request Key | Account Request ID |
|-----------------------|--------------------|-----------------|---|----------------------|-----------------------------|--------------------|
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:29 CST | 7j1-67j-q8l | 244624 |
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:28 CST | 7j1-67j-q8l | 244623 |
| <input type="radio"/> | Smith, Joey | JOEY SMITH | WORKS 8594079 T JOHNSON | 2020-12-09 17:48 CST | ra1-ij1-6ux | 244613 |
| <input type="radio"/> | sample, test | TESTING | WORKS TEST CC 8705504 | 2020-11-16 00:49 CST | 7j1-67j-q8l | 244572 |
| <input type="radio"/> | Corner, Lex | TOKENTEST | MCHIP ADV CHF COM | 2020-11-11 07:22 CST | yo2-oo9-jt9 | 244571 |

2. Selezionare il pulsante di opzione accanto alla richiesta di conto desiderata e fare clic su *Completa e approva*.
3. Verificare le informazioni sulla richiesta carta e modificare i dettagli del conto, se necessario.

Nota: è necessario verificare che sia stato inserito l'indirizzo corretto per garantire la consegna corretta della carta.

4. Una volta completata la revisione e/o le modifiche, fare clic su *Approva* per approvare la domanda o su *Rifiuta* per rigettarla.

Nota:

- Ai richiedenti viene inviata un'e-mail per confermare l'approvazione o il rifiuto della richiesta di conto, a meno che la Chiave di richiesta conto non sia stata impostata su *Elimina e-mail per i richiedenti*.
- Se la richiesta di conto viene rifiutata, il dipendente deve creare una nuova richiesta di conto, se necessario.
- In qualità di Amministratore del programma, è possibile ignorare una particolare richiesta che prevede l'Approvazione del gruppo andando alla scheda *Richieste inviate*, facendo clic sulla casella di controllo accanto al richiedente e selezionando *Ignora*. Dovrà fornire un commento per fornire una giustificazione per l'aggiornamento.

Gestione degli errori di richiesta conto (solo per gli USA)

Per i programmi statunitensi, gli Amministratori del programma possono risolvere gli errori di indirizzo identificati con le richieste di conti. Gli errori di indirizzo consistono in mancate corrispondenze tra lo Stato e il CAP forniti in una richiesta di conto. Questa funzionalità è disponibile solo per i programmi statunitensi.

1. Andare a *Richieste di conti > Approvazioni – Amministratore del programma* in alto nella Dashboard di amministrazione del programma o *Gestisci richieste conti* nel menu Azioni rapide.
2. Fare clic sulla scheda *Errori*.

Nota: un numero viene visualizzato nella scheda Errori quando sono stati identificati errori di indirizzo in una richiesta di conto.

3. Selezionare il pulsante di opzione accanto al richiedente desiderato.
4. Fare clic su *Correggi e invia nuovamente*.

Home Account Requests Administration

/ Account Requests / Approvals - Program Administrator

Account Requests - Program Administrator

Awaiting Approval Submitted Requests Completed Requests **Errori 1** [Clear Filters](#)

| Applicant | Error | Embossed Name 1 | Errors Account | Submitted | Account Request Key | Account Request ID | Approved By | Approved Date | |
|-----------------------|-------------------|----------------------|------------------|---------------------------------------|----------------------|-----------------------------|-------------|---------------|----------------------|
| <input type="radio"/> | Creation, Request | View | REQUEST CREATION | WORKS TEST CC 8705504 | 2020-11-11 06:25 CST | 711-871-981 | 244570 | GPA, Anusha | 2020-11-11 06:26 CST |

1 Selected | 1 item Show 10 per page Page: 1 of 1

5. Modificare lo Stato e/o il CAP nella sezione Indirizzo, se necessario.
6. Fare clic su *Invia nuovamente*. La richiesta passerà dalla coda *Errori* a quella *Richieste completate*.

Visualizzazione e download delle richieste di conti completate

1. Andare a *Richieste di conti > Approvazioni – Amministratore del programma* in alto nella Dashboard di amministrazione del programma o *Gestisci richieste conti* nel menu Azioni rapide.
2. Fare clic sulla scheda *Richieste completate*.
3. Selezionare il richiedente di cui si desidera visualizzare la richiesta e fare clic su *Visualizza dettagli completi*.
4. Selezionare la casella di controllo accanto a ogni richiesta di conto che si desidera scaricare.
5. Fare clic su Scarica.
6. Selezionare il formato di download e seguire le istruzioni per salvare o aprire il file.

Personalizza richieste

È possibile personalizzare le richieste di carte aggiungendo una notifica che sarà visualizzata ai richiedenti nella parte superiore del modulo di richiesta del conto, oppure personalizzando l'identificatore interno richiesto ai richiedenti durante il processo di richiesta della carta online.

Notifiche

1. Andare su *Amministrazione* → *Personalizza richiesta* in alto nella Dashboard di amministrazione del programma.
2. Se in precedenza sono state impostate delle notifiche, le suddette saranno elencate in questa vista. Se si desidera aggiungere una nuova notifica, fare clic sul menu a discesa *Crea* nell'angolo in alto a destra.
3. Fare clic su *Crea notifica*.

Home Account Requests Administration

/ Administration / Customize Application QL Test Company

Customize Application Create

Notifications Field Customization

| | Notification ID | Corporate Account | Updated By | Updated | Expiration Date |
|--------------------------|---------------------|---|-------------|----------------------|-----------------|
| <input type="checkbox"/> | | <input type="text"/> | | | |
| <input type="checkbox"/> | 187 | APAC AUD CC 1500000 | M, Abhishek | 2020-09-09 12:39 CDT | n/a |
| <input type="checkbox"/> | 186 | WORKS CAD 8594073 T JOHNSON | M, Abhishek | 2020-09-09 12:38 CDT | n/a |

4. Se si dispone di più conti aziendali, sarà necessario specificare a quale conto aziendale si desidera aggiungere la notifica. Dopo aver selezionato l'account aziendale, fare clic su *OK*.
5. Immettere il testo di notifica desiderato nella casella di testo *Notifica* e selezionare una data di scadenza per il messaggio (opzionale).

6. Fare clic su *Salva*.
7. È possibile modificare le notifiche create in qualsiasi momento facendo clic sull'*ID notifica*. Per eliminare una notifica, fare clic sulla casella di controllo accanto all'*ID notifica* e fare clic su *Scadenza ora* e successivamente su *OK*.

Personalizzazione del campo

1. Andare su *Amministrazione* → *Personalizza richiesta* in alto nella Dashboard di amministrazione del programma.
2. Fare clic sulla scheda *Personalizzazione campo*.
3. Il campo identificatore del dipendente standard per le richieste della carta è l'*ID del dipendente*. Se si desidera modificare l'etichetta di questo campo con un altro tipo di identificativo interno, inserire la nuova etichetta che si desidera sia visualizzata ai richiedenti nelle richieste di carte online all'interno della casella di testo *inglese*.

Nota: l'etichetta del campo ID del dipendente può contenere fino a 30 caratteri.

4. Inserire il valore tradotto della nuova etichetta del campo in francese, tedesco, italiano e spagnolo.
5. Fare clic su *Salva*.

Report registrazione utente

Gli Amministratori del programma possono visualizzare quali singoli utenti sono o non sono registrati per Global Card Access.

1. Andare a *Report registrazione* in alto nella Dashnpard di amministrazione del programma.
2. Il Report registrazione viene visualizzato con tutti i conti carta che rientrano nell'ambito di applicazione.
 - a. È disponibile un filtro sopra ogni colonna per facilitare la ricerca.
 - b. Per filtrare in base a uno o più conti aziendali particolari, utilizzare il Filtro avanzato sul lato sinistro.
 - c. Se il titolare della carta non ha registrato la propria carta in Global Card Access, il Nome utente sarà visualizzato come “Nessun utente associato”.

| | User Name | Name on Card | Account Last 4 | Corporate Account | Card Status |
|--------------------------|----------------|--------------|----------------|---------------------------|-------------|
| <input type="checkbox"/> | | | | | Active |
| <input type="checkbox"/> | 0105, GodProxy | WILLIAM GOAT | 5800 | EXPERIAN FILE TEST34-1005 | Active |
| <input type="checkbox"/> | 1, proxy | DELETE TEST | 4322 | AUTOM CC 6600948 #1-0435 | Active |
| <input type="checkbox"/> | 1, proxy | TONI HODSON | 7374 | EXPERIAN FILE TEST34-1005 | Active |
| <input type="checkbox"/> | 1086, Proxy | | 7911 | EXPERIAN FILE TEST34-1005 | Active |
| <input type="checkbox"/> | 2, proxy | 2520CARD | 2893 | PINCHECK SEK-8422 | Active |
| <input type="checkbox"/> | 2520, check | | 8350 | PINCHECK SEK-8422 | Active |

3. Per scaricare il Report registrazione, selezionare la casella di controllo per ogni conto che si desidera visualizzare nel report e fare clic su Scarica.
4. Selezionare il formato di download e seguire le istruzioni per salvare o aprire il file.

Il mio conto

Global Card Access consente agli Amministratori di accedere ai propri conti carta individuali tramite la scheda I miei conti.

The screenshot displays the 'Global Card Access' dashboard. At the top, there's a navigation bar with 'Program Administration' and 'My Accounts'. The main header shows the Bank of America logo and the user 'Chris Test'. Below this, the 'Global Card Access' section is active, with links for 'Home', 'Administration', and 'Enrollment Report'. The 'Account Summary' for 'US LC CERT CORP - 1717' is shown, with balances as of Oct 25, 2022, 10:32 AM CDT. The summary table includes:

| Payment due date | Current balance | Credit limit | Available credit |
|------------------|-----------------|--------------|------------------|
| Jan 27, 2023 | 195.00 | 60.00 | 0.00 |

Additional details include 'Balance on last statement' (195.00) and 'Last payment' (9.23). On the right, 'My tasks' shows 'No tasks at this time.' Below this, 'Quick actions' includes links for 'Manage users', 'View statements', and 'Make a payment'. A 'Card rewards' section shows a link to 'Redeem reward points' and a current balance of 'Reward points: 10,346 pts'.

- Per aggiungere un conto al profilo Global Card Access esistente, unire più conti in Global Card Access o modificare il profilo in Global Card Access, fare riferimento a [Come gestire il proprio conto in Global Card Access](#)
- Per visualizzare il PIN, fare riferimento a [Come utilizzare la carta con chip e PIN](#)
- Per modificare il PIN, fare riferimento a [Come modificare il PIN in Global Card Access](#)
- Per impostare gli avvisi, fare riferimento a [Come impostare gli avvisi in Global Card Access](#)
- Per visualizzare gli estratti conto, fare riferimento a [Come visualizzare l'estratto conto in Global Card Access](#)
- Per bloccare/sbloccare la carta, fare riferimento a [Come bloccare e sbloccare la carta in Global Card Access](#)
- Per effettuare un pagamento, fare riferimento alle [istruzioni per il pagamento dei titolari di carta](#) (solo per il Nord America)
- Per ulteriori informazioni su Strong Customer Authentication (SCA), fare riferimento al [sito Web SCA](#) (solo per EMEA)
- Per ulteriori informazioni sul supporto ai conti, sui tipi di premi disponibili e sull'utilizzo dei punti, fare riferimento alle [Domande frequenti su Premium Rewards](#) (solo per gli Stati Uniti)

Global Card Access (Deutsch)

Globales Benutzerhandbuch – Programmverwalter

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Einleitung

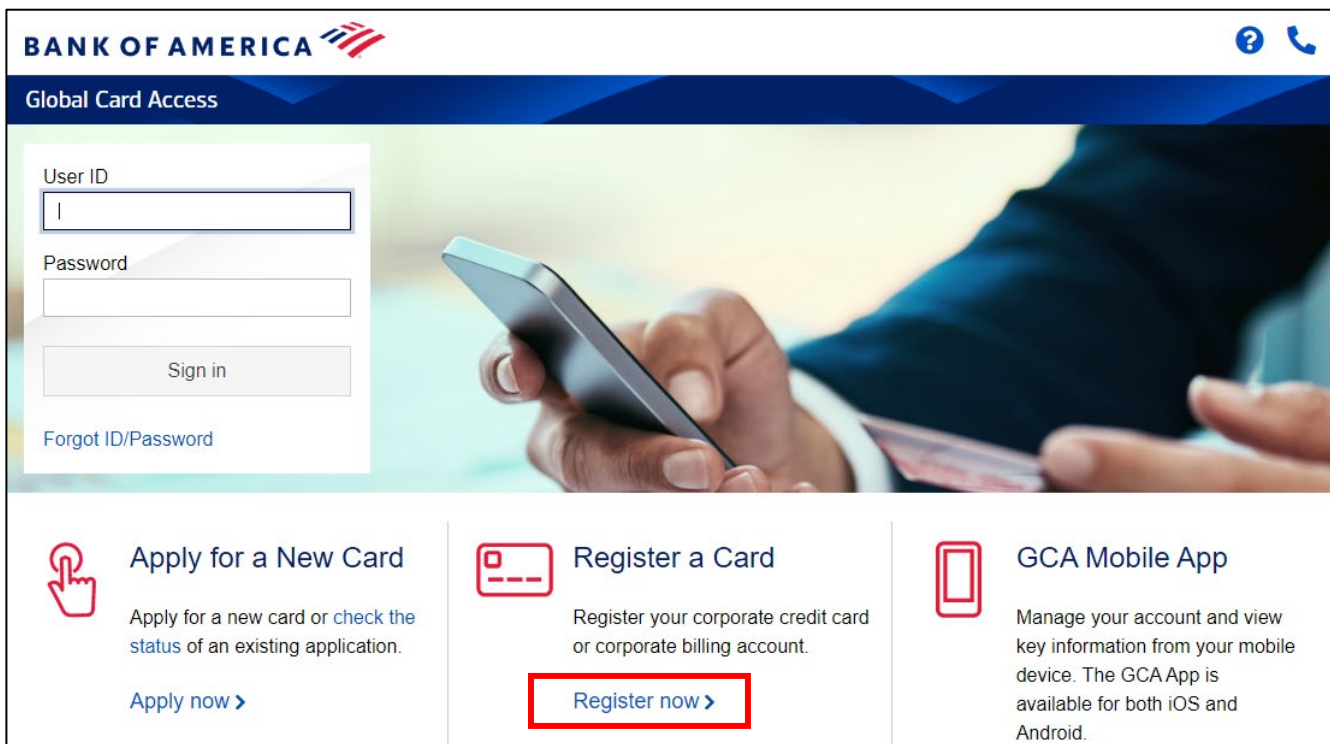
Global Card Access ist ein Online-Tool zur Kartenverwaltung, das Ihnen und Ihren Karteninhabern Zugriff auf Ihre Firmenkarteninformationen bietet, wann, wo und wie immer Sie sie benötigen. Als Programmverwalter können Sie Ihr globales Konto-Dashboard einsehen, Ihre Karteninhaber verwalten, neue Kontoanfragen online genehmigen, Zahlungen vornehmen¹ und Ihre Kontoauszüge einsehen. Ihre Karteninhaber haben Zugriff auf Funktionen wie das Überprüfen ihres Kreditlimits, ihres Guthabens und ihrer verfügbaren Kredite sowie das Einsehen/Ändern ihrer PIN, das Sperren der Karte, das Verwalten von Benachrichtigungen, das Zugreifen auf Kontoauszüge und das Tätigen von Zahlungen² für zusätzlichen Komfort und Sicherheit.


Erstmalige Anmeldung für Firmenkonten

Ein Programmverwalter, der das Firmenkartenprogramm eines Unternehmens in Nordamerika verwaltet, kann sich unter Verwendung der Nummer des Firmenabrechnungskontos des Unternehmens für Global Card Access registrieren. Programmverwalter, die EMEA- und APAC-Firmenkonten verwalten, sollten sich an Card Digital Services wenden, um sich für Global Card Access zu registrieren. Alle Karteninhaber weltweit können ihr Konto bei Global Card Access selbst registrieren.

Führen Sie die folgenden Schritte durch, um sich als neuer Benutzer für ein Firmenkonto anzumelden:

1. Besuchen Sie die Website von Global Card Access unter <https://www.bankofamerica.com/globalcardaccess>.
2. Klicken Sie auf dem Bildschirm „Global Card Access“-Anmeldung auf *Jetzt registrieren*.



BANK OF AMERICA 


Global Card Access


User ID


Password

Sign in

[Forgot ID/Password](#)

 **Apply for a New Card**
Apply for a new card or [check the status](#) of an existing application.
[Apply now >](#)

 **Register a Card**
Register your corporate credit card or corporate billing account.
[Register now >](#)

 **GCA Mobile App**
Manage your account and view key information from your mobile device. The GCA App is available for both iOS and Android.

3. Geben Sie die Nummer des Firmenabrechnungskontos Ihres Unternehmens ein und klicken Sie auf *Weiter*.

New User Registration

Enter your corporate card number or your company's billing account number.

4. Geben Sie Ihre Kontoinformationen ein (Firmenname, Firmennummer, Kreditlimit, Postleitzahl) und klicken Sie auf *Weiter*.

Wichtig:

- Geben Sie den Firmennamen genau so ein, wie er auf Ihrer Abrechnung erscheint.
- Geben Sie Ihr Kreditlimit ohne Dollarzeichen, Kommas oder Dezimalstellen ein.

Verify Your Card

1

2

3

Card Number
471569*****0738

Company Name
 ?

Company Number
 ?

Credit Limit
 ?

ZIP / Postal Code
 ?

5. Erstellen Sie Ihre Benutzer-ID und Ihr Passwort und beantworten Sie drei Sicherheitsfragen. Mit diesen Informationen wird Ihre Identität verifiziert. Klicken Sie auf *Fortfahren*.
- Eine Benutzer-ID muss mindestens sieben und darf maximal 50 Zeichen umfassen.
 - Ein Passwort muss mindestens zwölf und darf maximal 100 Zeichen umfassen und muss alphabetische und numerische Zeichen enthalten. Bei Passwörtern ist auf die Groß- und Kleinschreibung zu achten.

Create Your Account

1

2

3

Create a User ID

Create a Password

Confirm Password

Select and answer three security questions. These will be used to verify your identity.

Question 1

Answer 1

Question 2

Answer 2

Question 3

6. Geben Sie Ihre Benutzerinformationen ein (Vorname, Nachname, E-Mail-Adresse) und klicken Sie auf *Absenden*.

Enter Your Information

1
2
3

First Name


Middle Name



Last Name

Employee ID

Email Address

7. Sie werden zur Seite von Global Card Access weitergeleitet, um sich mit den von Ihnen gerade erstellten Zugangsdaten anzumelden. Sie erhalten ferner eine E-Mail, in der Ihre Anmeldung bestätigt wird.
8. Akzeptieren Sie bei Ihrer nächsten Anmeldung die Allgemeinen Geschäftsbedingungen, um Ihre Registrierung abzuschließen.



Global Card Access

Terms and Conditions

TERMS OF USE FOR BANK OF AMERICA GLOBAL CARD ACCESS WEBSITE

IMPORTANT! PLEASE READ THE FOLLOWING TERMS OF USE CAREFULLY.

By clicking the "Accept" button or Using the Network (as defined below), you:

1. Agree to comply with these terms of use ("Terms of Use") for the Services (as defined below) and GCA Service website (the "Site").
2. Agree that you may use the Service and the Site only if you have been expressly authorized to do so by the Client (as defined below).
3. Acknowledge that you have read all of the terms set out in these Terms of Use (in particular, we draw your attention to the terms set out under "Disclaimer of Warranties and Limitations of Liability" and "General" below).
4. Acknowledge that you are only being provided with the Service and the Site as an authorized user of the Client.
5. Acknowledge that you are not being provided with the Services and the Site either as a consumer or with respect to any of your individual or personal accounts with the Bank (as defined below) or its affiliates.
6. Agree to receive within this Site or through Alerts, the Terms of Use, all updates to the foregoing, and all disclosures, notices, alerts, and other communications regarding the Site.
7. Acknowledge that these Terms of Use will only be provided to you once even if you Use the Site with respect to multiple card accounts, and you agree that you will be deemed to have entered into these Terms of Use separately with respect to each such card account.
8. Agree, if you are resident in Canada, India or Singapore, to the collection, use and disclosure of your personal data and other data processing activities set out in the Privacy Notice for Canada, India and Singapore referenced below.
9. Agree to us communicating with you through the methods of electronic transmission set forth in the terms and conditions below, including through electronic mail (e-mail) and text messaging services.
10. Agree to us to sending communications using an automatic telephone dialing system or an artificial or prerecorded voice system.

You can withdraw your consent to the Terms of Use by calling customer service through the telephone numbers provided in the Contact Us section within the Site. However, withdrawing your consent means you will no longer be able to access or otherwise Use the Site or the Services.

IF YOU DO NOT AGREE TO THE TERMS OF USE, YOU MUST NOT USE THE SITE OR THE NETWORK.

"Bank", "we", "our", or "us" means with respect to cards issued in (i) Australia, Bank of America, National Association acting through its Australia Branch; (ii) Austria, Belgium, Bulgaria, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Sweden, Switzerland, Spain, Turkey, or the United Kingdom, Bank of America Europe Designated Activity Company; (iii) Canada, Bank of America, National Association acting through its Canada Branch; (iii) Hong Kong, Bank of America, National Association acting through its Hong Kong Branch; (iv) India, Bank of America, National Association acting through its Mumbai Branch; (v) Singapore, Bank of America, National Association acting through its Singapore Branch; and (vi) United States, Bank of America, N.A.

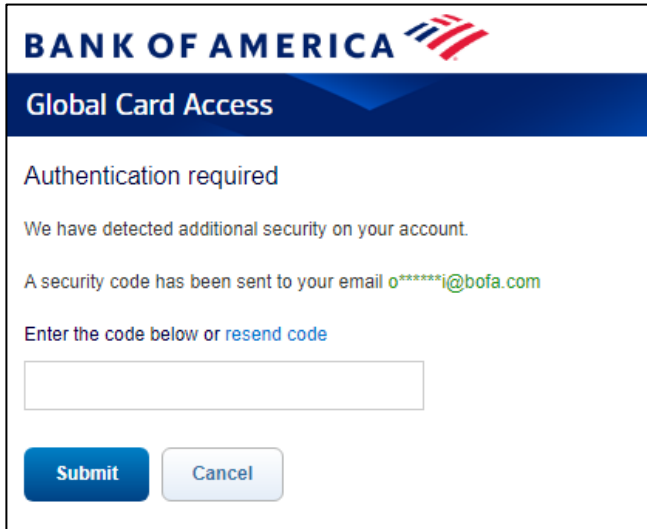
"Card Agreement" means a, Card Services Agreement, or Commercial Card agreement, in either case, entered into by Client with the Bank.

"Client" means client that is a legal entity and that has entered into a Card Agreement with the Bank.

By choosing Accept, you agree to the terms and conditions. Choose Decline to cancel.

Anmeldung bei Global Card Access

Melden Sie sich über den folgenden Link bei Global Card Access an: bankofamerica.com/globalcardaccess. Nach der Registrierung erfordert die darauffolgende Anmeldung bei Global Card Access für alle Benutzer eine zusätzliche Authentifizierung über einen einmaligen Zugangscode (One-Time Passcode, OTP).



Wichtig:

- Der OTP ist nur für die aktuelle Sitzung gültig und läuft innerhalb von 15 Minuten ab dem Zeitpunkt der Erstellung ab. Ein neues OTP ist erforderlich, wenn die aktuelle Sitzung aufgrund von Inaktivität endet.
- Über den Link zum erneuten Senden des Codes können Sie einen neuen Einmal-OTP per E-Mail anfordern. Dies führt dazu, dass alle ausstehenden ZugangsCodes ablaufen, die zuvor während der Anmeldung gesendet wurden. Mehrere aufeinanderfolgende abgelaufene oder ungültige Token-Eingaben führen dazu, dass Ihr Konto gesperrt wird.
- Für Benutzer in Nordamerika und EMEA wird ein E-Mail-OTP nur bei der ersten Anmeldung von einem bestimmten Gerät/Browser aus angezeigt. Benutzer können weiterhin von demselben Gerät/Browser aus auf Global Card Access zugreifen und werden in Zukunft nicht mehr aufgefordert, ein E-Mail-OTP einzugeben, da dieses Gerät nun erkannt wurde.
- APAC-Benutzer erhalten aufgrund regionaler regulatorischer Anforderungen bei jeder Anmeldung einen E-Mail-OTP.

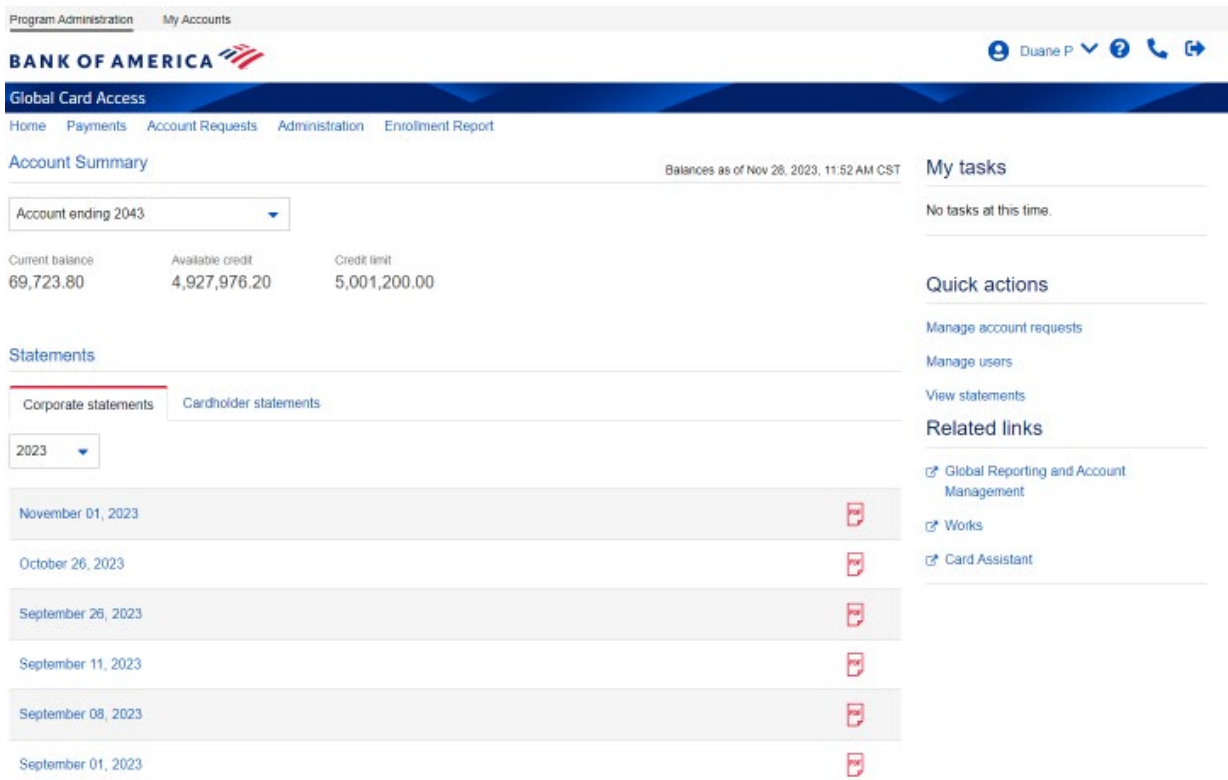
Verwenden Sie die Benutzer-ID und das Passwort, die Sie bei der Registrierung erstellt haben, um sich bei Global Card Access anzumelden, falls Sie sich selbst für ein Konto registriert haben.

Wenn Ihre Rolle entweder von einem Programmverwalter in Ihrem Unternehmen oder einem Benutzer von Bank Servicing für Sie erstellt wurde, erhalten Sie eine E-Mail von Global Card Access mit Ihrer Benutzer-ID und einen Link zum Abschließen der Registrierung, indem Sie Ihr Passwort und Ihre Sicherheitsfragen festlegen. Sie können Ihre Benutzer-ID in Ihrem Profil ändern, wenn Sie sich bei Global Card Access anmelden.

Dashboard für die Programmverwaltung

Im Konto-Dashboard können Sie die Ausgabendetails, Abrechnungen, das Kreditlimit und das verfügbare Kreditlimit anzeigen und Zahlungen für Ihre Firmenkonten vornehmen. Die folgenden Links befinden sich ebenfalls in der Navigationsleiste auf der rechten Seite und bieten schnellen, einfachen Zugriff auf häufig verwendete Funktionen:

- Meine Aufgaben – Benachrichtigungsbereich über alle ausstehenden Elemente, die bearbeitet werden müssen (z. B. Ablauf des Passworts oder Ablauf des Kontoeröffnungs-Codes).
- Schnellmaßnahmen – Die in diesem Menü aufgeführten Optionen unterscheiden sich je nach der vom Unternehmen gewünschten Konfiguration und der regionalen Verfügbarkeit.
 - Kontoanfragen verwalten – greifen Sie auf die Kontoanfragen zu, die noch genehmigt werden müssen, und zeigen Sie den Kontoanfrageverlauf an.
 - Benutzer verwalten – sehen Sie eine vollständige Liste der mit Ihrem Unternehmen verknüpften Benutzer ein.
 - Abrechnungen anzeigen – aktuelle und vergangene Unternehmensabrechnungen anzeigen. Wenn Ihre Rechnung zur Ansicht verfügbar ist, erhalten Sie eine E-Mail-Benachrichtigung.
 - Kartenprämien (nur USA) – berechnete Konten können den verfügbaren Premium Reward-Punktestand einsehen und auf die Prämienseite zugreifen, um Prämienpunkte einzulösen.
- Weiterführende Links
 - Global Reporting und Account Management – öffnet Global Reporting und Account Management in einer neuen Registerkarte oder einem neuen Browser-Fenster.
 - Works – öffnet Works in einer neuen Registerkarte oder einem neuen Browser-Fenster.
 - Card Assistant – öffnet Card Assistant, Ihr kommerzielles Kartenressourcenzentrum, in einer neuen Registerkarte oder einem neuen Browserfenster.



The screenshot displays the 'Global Card Access' dashboard for a user named Duane P. The dashboard is divided into several sections:

- Account Summary:** Shows the current balance of 69,723.80, available credit of 4,927,976.20, and a credit limit of 5,001,200.00. The account is ending in 2043. Balances are as of Nov 28, 2023, 11:52 AM CST.
- Statements:** A section for viewing statements, currently showing 'Corporate statements' for the year 2023. A list of statement dates is provided: November 01, 2023; October 26, 2023; September 26, 2023; September 11, 2023; September 08, 2023; and September 01, 2023. Each date has a download icon.
- My tasks:** A section indicating 'No tasks at this time.'
- Quick actions:** A list of actions including 'Manage account requests', 'Manage users', and 'View statements'.
- Related links:** A list of links including 'Global Reporting and Account Management', 'Works', and 'Card Assistant'.

Benutzerverwaltung

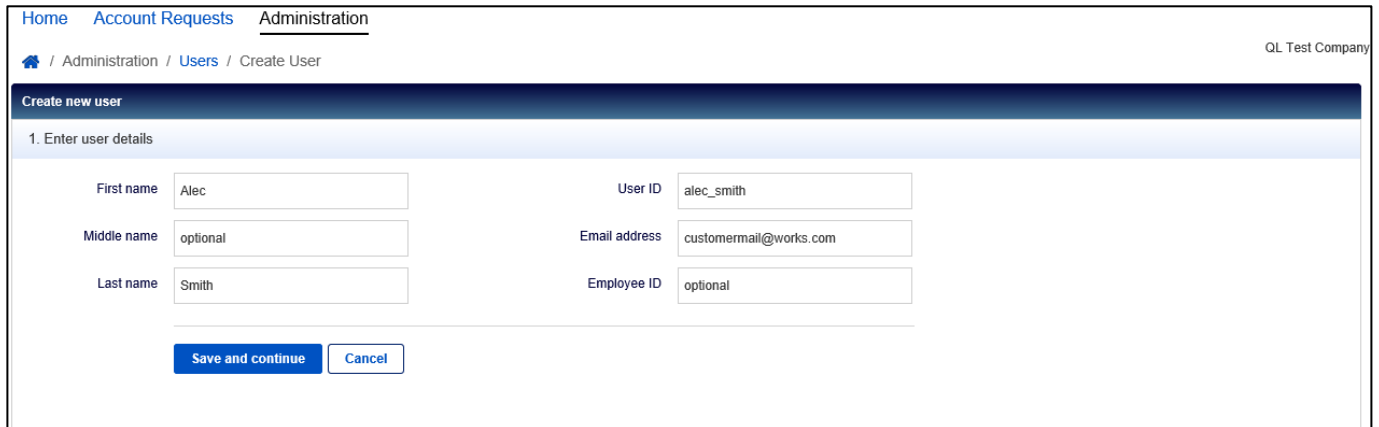
Als Programmverwalter können Sie Benutzer anzeigen, erstellen, bearbeiten und deaktivieren sowie ihre Passwörter zurücksetzen.

Einsehen von Benutzern

1. Gehen Sie oben im Dashboard für die Programmverwaltung zu *Verwaltung* → *Benutzer* oder zu *Benutzer verwalten* im Menü „Schnellmaßnahmen“.
2. Dies zeigt Ihnen eine Ansicht aller Benutzer in Ihrem Geltungsbereich, die für Global Card Access registriert sind, zusammen mit ihrem Rollentyp.

Erstellen eines Benutzers

1. Gehen Sie oben im Dashboard für die Programmverwaltung zu *Verwaltung* → *Benutzer* oder zu *Benutzer verwalten* im Menü „Schnellmaßnahmen“.
2. Klicken Sie in der oberen rechten Ecke auf *Erstellen*.
3. Wählen Sie *Benutzer erstellen*.
4. Geben Sie die Benutzerdetails ein: Name, Benutzer-ID, Mitarbeiter-ID (optional) und E-Mail-Adresse.
 - Eine Benutzer-ID muss mindestens sieben und darf maximal 50 Zeichen umfassen.
 - Sie können die Feldbezeichnung von der Mitarbeiter-ID an Ihre bevorzugte interne Kennung (z. B. Personennummer) anpassen. Weitere Informationen finden Sie im Abschnitt „Anträge anpassen“.
5. Klicken Sie auf *Speichern und fortfahren*.



Home Account Requests Administration

/ Administration / Users / Create User

QL Test Company

Create new user

1. Enter user details

| | | | |
|-------------|---------------------------------------|---------------|---|
| First name | <input type="text" value="Alec"/> | User ID | <input type="text" value="alec_smith"/> |
| Middle name | <input type="text" value="optional"/> | Email address | <input type="text" value="customermail@works.com"/> |
| Last name | <input type="text" value="Smith"/> | Employee ID | <input type="text" value="optional"/> |

6. Weisen Sie dem neuen Benutzer die gewünschten Rollen zu. Vorhandene Rollenoptionen:
 - Programmverwalter: Der Benutzer hat die volle administrative Berechtigung für die ausgewählten Rechnungskonten.
 - i. Klicken Sie auf *Konten hinzufügen*, um Konten zuzuweisen, für die der Benutzer ein Programmverwalter sein wird.
 - ii. Wählen Sie das Optionsfeld für den Typ des Programmverwalters, den Sie erstellen möchten.
 1. Wenn Sie *Alle Konten (Global)* auswählen, erhält der Benutzer die Rolle des Globalen Programmverwalters, in der er administrative Berechtigungen für alle bestehenden Rechnungskonten Ihres Unternehmens sowie für alle zukünftigen Rechnungskonten hat.

Hinweis: Diese Option ist aufgrund der Konfiguration Ihres Unternehmens möglicherweise nicht verfügbar.

2. Die Auswahl von *Konten auswählen (umfassend)* gibt dem Benutzer die Rolle des Programmverwalters, in der er administrative Berechtigungen für eine Untergruppe der Rechnungskonten Ihres Unternehmens hat. Verwenden Sie die Optionsfelder, um diese spezifischen Konten zu kennzeichnen.
3. Wenn Sie *Keine* auswählen, wird die Rolle des Programmverwalters von dem Benutzer entfernt.
- iii. Klicken Sie auf *Hinzufügen*, sobald Sie Ihre Auswahl getroffen haben.
- Prüfer: Der Benutzer hat Lese-Berechtigungen für die ausgewählten Rechnungskonten.
 - i. Klicken Sie auf *Konten hinzufügen*, um Konten zuzuweisen, für die der Benutzer ein Prüfer sein wird.
 - ii. Wählen Sie das Optionsfeld für den Typ des Prüfers, den Sie erstellen möchten.
 1. Wenn Sie *Alle Konten (Global)* auswählen, erhält der Benutzer die Rolle des Globalen Prüfers, in der er Lese-Berechtigungen für alle Rechnungskonten Ihres Unternehmens sowie für alle zukünftigen Rechnungskonten hat.
Hinweis: Diese Option ist aufgrund der Konfiguration Ihres Unternehmens möglicherweise nicht verfügbar.
 2. Die Auswahl von *Konten auswählen (umfassend)* gibt dem Benutzer die Rolle des Prüfers, in der er Lese-Berechtigungen für eine Untergruppe der Rechnungskonten Ihres Unternehmens hat. Verwenden Sie die Optionsfelder, um diese spezifischen Konten zu kennzeichnen.
 3. Wenn Sie *Keine* auswählen, wird die Rolle des Prüfers von dem Benutzer entfernt.

Wichtig: Ein Benutzer kann kein Programmverwalter und Prüfer für dasselbe Rechnungskonto sein.

- Genehmiger von Kontoeröffnungs-Anträgen: Falls für Ihr Programm zutreffend, kann der Benutzer Anträge für Online-Kontoanfragen genehmigen.
 - i. Klicken Sie auf *Genehmigungsgruppen hinzufügen*, um die Gruppen hinzuzufügen, für die dieser Benutzer Anträge genehmigen soll.
- Kartenbesitzer: Dieser Benutzer wird dem Kartenkonto eines anderen Karteninhabers zugewiesen, um Funktionen in seinem Namen auszuführen, wie z. B. das Einrichten von Benachrichtigungen, das Überprüfen von Abrechnungen usw. Diese Rolle wird häufig Executive Assistants zugewiesen, um Funktionen für die Karte ihres Managers auszuführen.
 - i. Klicken Sie auf *Konten hinzufügen*, um Konten hinzuzufügen, für die der Benutzer bestimmte Berechtigungen hat.
- 7. Klicken Sie auf *Fertigstellen*, wenn Sie die Rollenzuweisung abgeschlossen haben. Der Benutzer erhält eine Willkommens-E-Mail von Global Card Access mit seiner Benutzer-ID und den Schritten zum Abschluss seiner Registrierung.

Bearbeiten von Benutzerangaben

1. Gehen Sie oben im Dashboard für die Programmverwaltung zu *Verwaltung* → *Benutzer* oder zu *Benutzer verwalten* im Menü „Schnellmaßnahmen“.
2. Klicken Sie auf den Namen des gewünschten Benutzers und wählen Sie *Vollständige Details ansehen*.

Administration / Users

Users Create ▼

Clear Filters

| User ID | Name | Program Administrator (Global) | Program Administrator (Scoped) | Group Approver | Cardholder | Proxy User | Global Auditor | Scoped Auditor | GRAM | Locked | Email Address | Last Login Date |
|---------------------|--------------|--------------------------------|--------------------------------|----------------|------------|------------|----------------|----------------|------|----------|------------------------------|----------------------|
| romainvyls | Wyts, Romain | | | | X | | | | | Unlocked | customermail@works.com | 2021-01-06 12:10 CST |
| cardholder2520 | 2520, card | | | | X | | | | | Unlocked | medikonda.keerthi@bofa.com | 2021-08-18 07:43 CDT |
| msEmailRegistration | 2520 mari | | | | X | | | | | Unlocked | msspencer@bofa.com | |
| number_2520 | | | | | X | | | | | Unlocked | mutheswari.muthuraj@bofa.com | 2021-11-15 06:41 CST |
| mari2520B | | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-30 09:22 CDT |
| ms2520cpv2.4533 | | | | | X | | | | | Unlocked | msspencer@bofa.com | 2021-06-03 16:13 CDT |

Context menu for '2520 mari':

- View Full Details
- Reset Password
- Resend Welcome Email
- Deactivate User

3. Bearbeiten Sie die verfügbaren Felder wie gewünscht und klicken Sie auf *Speichern*.
 - Eine Benutzer-ID muss mindestens sieben und darf maximal 50 Zeichen umfassen.
 - E-Mails für anstehende Genehmigungen ausblenden – Durch das Auswählen dieses Kontrollkästchens kann der Benutzer verhindern, jedes Mal eine E-Mail zu erhalten, wenn eine Kontoanfrage von einem Bewerber eingereicht wird.
 - Geben Sie meinen Namen oder meine E-Mail-Adresse nicht in E-Mails an den Bewerber an – die Auswahl dieses Kontrollkästchens unterdrückt den Namen und die E-Mail-Adresse des Benutzers in E-Mails an den Bewerber.

Deaktivieren eines Benutzers

1. Gehen Sie oben im Dashboard für die Programmverwaltung zu *Verwaltung* → *Benutzer* oder zu *Benutzer verwalten* im Menü „Schnellmaßnahmen“.
2. Klicken Sie auf den Namen des gewünschten Benutzers und wählen Sie *Benutzer deaktivieren* aus.
3. Klicken Sie auf *OK*. Der Benutzer kann sich nicht mehr bei Global Card Access anmelden.

Zurücksetzen eines Passworts

1. Gehen Sie oben im Dashboard für die Programmverwaltung zu *Verwaltung* → *Benutzer* oder zu *Benutzer verwalten* im Menü „Schnellmaßnahmen“.
2. Klicken Sie auf den Namen des gewünschten Benutzers und wählen Sie *Passwort zurücksetzen*.
3. Klicken Sie auf *OK*. Der Benutzer erhält eine E-Mail mit weiteren Anweisungen, um sein Passwort erfolgreich zurückzusetzen.


Willkommens-E-Mail erneut senden


1. Gehen Sie oben im Dashboard für die Programmverwaltung zu *Verwaltung* → *Benutzer* oder zu *Benutzer verwalten* im Menü „Schnellmaßnahmen“.
2. Klicken Sie auf den Namen des gewünschten Benutzers und wählen Sie *Willkommens-E-Mail erneut senden* aus.

3. Klicken Sie auf *OK*. Der Benutzer erhält eine E-Mail mit weiteren Anweisungen, um sein Passwort und seine Sicherheitsfragen erfolgreich zurückzusetzen.

Verwaltung des Firmenkontos


1. Gehen Sie oben auf dem Dashboard für die Programmverwaltung auf *Verwaltung von → Firmenkonten*.
2. Klicken Sie auf das Konto, das Sie bearbeiten möchten, und wählen Sie *Vollständige Details ansehen*.

 / Administration / Corporate Accounts QL Test Company

| Corporate Accounts Clear Filters | | | | | | |
|---|----------------|-----------------|---------------------|--------|-------------------------------|---------------------|
| Account name | Account last 4 | TSYS account ID | TSYS company number | Region | Eligible for account requests | Eligible for alerts |
| APAC AUD CC 1500000 | 0766 | 80000001108 | 1500000 | APAC | X | |
|  View Full Details | 7759 | 80000014047 | 5800044 | EMEA | X | |

3. Bearbeiten Sie die Felder wie gewünscht und klicken Sie auf *Speichern*.
 - Aufgeprägter Name 2 ist der Standardwert, der auf Karten angezeigt wird, die an neue Bewerber ausgegeben werden; dies ist normalerweise der Unternehmensname.
 - Durch das Ausblenden des Buchhaltungscode bleibt das Feld „Buchhaltungscode“ für Programmverwalter bei Online-Kontoanfragen verborgen.
 - Wählen Sie die Genehmigungsmethode für Kontoanfragen aus. Wenn Sie online „Zusätzliche Genehmigung“ auswählen, können Sie Genehmigungsgruppen und Genehmigungspaneile einrichten, um Online-Kontoanfragen zusätzlich zur Genehmigung durch den Programmverwalter zu überprüfen und zu genehmigen.

Program Administration
My Accounts

BANK OF AMERICA 
Olga Terezi

Global Card Access

Home
Account Requests
Administration

/ Administration / Corporate Accounts / Corporate Account Details

EXPERIAN FILE TEST34

| | |
|------------------------------------|--|
| Account Name: EXPERIAN FILE TEST34 | Embossed Name 2 Default: EXPERIAN FILE TEST34 (1 - 21) |
| Account Last 4: 1086 | Suppress Accounting Code: <input type="radio"/> Yes <input checked="" type="radio"/> No |
| TSYS Company Number: 6600067 | Approval Method: Additional Approval - Online |
| HL1: 6600067 | Allow Cash: <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Region: US/Canada | Delivery Options: |
| Currency: U.S. DOLLAR | <input type="checkbox"/> Standard Post to the cardholder at the primary mailing address (5-10 business days) |
| Enrolled in Alerts: No | <input type="checkbox"/> Overnight/urgent delivery to the cardholder at the primary mailing address (A fee may apply.) |
| | <input type="checkbox"/> Ship to the Program Administrator using the company bulk ship address (2-6 business days) |

Save

- Wählen Sie unten links auf dem Bildschirm Firmenkonten die Option *Hinzufügen* (nur Konten in Nordamerika), um ein Firmenkonto hinzuzufügen. Die Seite „Registrierung einer neuen Karte“ wird angezeigt.

Verwaltung von Online-Anträgen auf Kontoeröffnung

Mit Global Card Access können Ihre Mitarbeiter online neue Kartenkonten beantragen. Sie müssen Ihren Mitarbeitern einen Kontoeröffnungs-Code zur Verfügung stellen, den Sie generieren, damit Online-Kartenanträge erfolgreich eingereicht werden können. Als Programmverwalter können Sie Kontoeröffnungs-Codes erstellen und verwalten sowie neue Kontoanfragen überprüfen und genehmigen. Ihr Unternehmen muss für diese Funktion konfiguriert sein.

Erstellen von Kontoeröffnungs-Codes (Video-Tutorial)

Ihre Mitarbeiter werden Kontoeröffnungs-Codes verwenden, um online Konten anzufordern. Jeder Kontoeröffnungs-Code hat spezifische Einstellungen, die regeln, wie das Konto eines Mitarbeiters eingerichtet und verwaltet wird, z. B. das Unternehmenskonto, mit dem ein Konto verknüpft wird, und die Art der Karte, die der Bewerber nach der Genehmigung erhält.

Hinweis: Sobald ein Konto für ein bestimmtes Firmenkonto oder einen bestimmten Produkttyp angefordert wurde, kann es nicht mehr geändert werden. Hat der Antragsteller einen Antrag mit einem falschen Kontoeröffnungs-Code für das vorgesehene Konto gestellt, so hat er einen neuen Antrag zu stellen.

1. Gehen Sie oben im Dashboard für die Programmverwaltung zu *Kontoanfragen > Codeverwaltung*.
2. Klicken Sie in der oberen rechten Ecke auf das Dropdown-Menü *Erstellen* und wählen Sie *Kontoeröffnungs-Code(s) erstellen*.


| Global Card Access | | | | | | | | | | | | |
|--|--------|---|----------------|-----------|-----------------------------|-------------------------------|-----------------------|--------------------|----------------------|------------|-----------------|------------------------|
| Home Account Requests Administration Bank User | | | | | | | | | | | | |
| / Account Requests / Key Management | | | | | | | | | | | | |
| Account Request Keys | | | | | | | | | | | | Create ▾ |
| <div> <div>>></div> <div>Create Account Request Keys</div> </div> | | | | | | | | | | | | |
| | Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses |
| <input type="checkbox"/> | Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-ix4-5zj | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | io0-0nm-5x4 | Alerts | PA Approval Only | | | 2020-12-16 | 2020-12-19 | 5 |
| <input type="checkbox"/> | Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67j-q8l | MK | Single Group Approval | Group | 1,500.00 | 2020-09-22 | 2022-09-22 | 100 |
| <input type="checkbox"/> | Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | MCHIP ADV AUD TRVL - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |
| <input type="checkbox"/> | Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | EMEA key | PA Approval Only | | 2,500.00 | 2020-07-22 | 2022-07-22 | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-gu0 | MCHIP ADV SEK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a |

Hinweis: Wenn mehrere Firmenkonten vorhanden sind, wird das Fenster *Firmenkonten auswählen* angezeigt. Wählen Sie ein Firmenkonto aus und klicken Sie auf *OK*.

3. Füllen Sie die Seite *Kontoeröffnungs-Code(s) erstellen* aus.
 - a. Konfigurieren Sie Ihren Kontoeröffnungs-Code im Abschnitt *Einstellungen*.
 - i. *Code-Nickname* bietet Ihnen die Möglichkeit, den Code mit einem benutzerfreundlichen Namen zu versehen.


- ii. Felder unter *Ablaufdatum* sind optional und bieten Ihnen Benachrichtigungen, wenn Codes bald ablaufen.
 - b. Wählen Sie eine der optionalen *Optionen für Kontoeröffnungs-Anträge* aus.
 - i. Wenn Sie *Mitarbeiter-ID anzeigen* auswählen, müssen Sie eine Mindest- und Höchstlänge für das Feld Mitarbeiter-ID festlegen. Sie können auch angeben, ob die Mitarbeiter-ID erforderlich ist, wenn ein Kontoantrag eingereicht wird.
 - ii. Durch die Auswahl der Option *E-Mails ausblenden* wird verhindert, dass E-Mails im Zusammenhang mit Kontoanfragen an Bewerber gesendet werden.
 - iii. Wenn Sie die Option *Gewünschtes Kreditlimit ausblenden* auswählen, wird dieses Feld für Bewerber ausgeblendet, die eine Online-Kontoanfrage ausfüllen.
 - iv. Wenn Sie einen Betrag in das Feld *Standard-Kreditlimit* eingeben, wird der Betrag des Kreditlimits standardmäßig im Kontoantragsformular für Programmverwalter angezeigt. Sie können den Kreditlimitbetrag noch bearbeiten, bevor Sie eine Anfrage genehmigen, falls erforderlich.
 - v. Wenn Sie *Managerinformationen erforderlich* auswählen, wird angezeigt, dass ein Managername erforderlich ist, wenn ein Kontoantrag eingereicht wird.
 - c. Wählen Sie eine der *Genehmigungsmethode-Optionen* aus.
 - i. Wenn Sie *Nur PA-Genehmigung* auswählen, werden Kontoanfragen direkt an den Programmverwalter zur Genehmigung weitergeleitet.
 - ii. Durch die Auswahl von *Einzelne Gruppengenehmigung* werden Kontoanfragen zuerst an Mitglieder der ausgewählten Genehmigungsgruppe zur Genehmigung weitergeleitet, bevor sie an den Programmverwalter weitergeleitet werden. Klicken Sie auf das Suchwerkzeug, um den Namen einer Genehmigungsgruppe auszuwählen.
 - iii. Wenn Sie *Panel-Genehmigung* auswählen, werden Kontoanfragen an die Genehmigungsgruppen in der im Panel festgelegten Reihenfolge weitergeleitet, bevor sie an den Programmverwalter weitergeleitet werden. Klicken Sie auf das Suchwerkzeug, um den Namen eines Genehmigungspanels auszuwählen.
- 4. Klicken Sie auf *Speichern*.


Create Account Request Key(s)


* Corporate Account: 

Settings

* Number of Keys: (1 - 100)

Key Nickname:  A sequence number will be added to the key nickname when more than one key is requested.

* Start Date: 

* Expiration Date: 

☐ Limit number of uses to (1 - 10,000)

☐ Send key expiration reminder days before expiration

Account Request Options

☐ Display Employee ID


☐ Suppress emails to applicants

☐ Suppress Desired Credit Limit from applicants

Default Credit Limit: (1234.00)

☐ Require Manager Information

Approval Method Options

Approval Options: 

Deaktivieren oder Bearbeiten von Kontoeröffnungs-Codes

1. Gehen Sie oben im Dashboard für die Programmverwaltung zu *Kontoanfragen > Codeverwaltung*.
2. Wählen Sie den Kontoeröffnungs-Code aus, den Sie deaktivieren möchten, klicken Sie auf *Deaktivieren*, und klicken Sie dann auf *OK*, um einen Kontoeröffnungs-Code zu deaktivieren.

Account Request Keys

Create

>>

Clear Filters

| | Status | Corporate Account | Account Last 4 | Region | Account Request Key | Key Nickname | Approval Method | Group / Panel Name | Default Credit Limit | Start Date | Expiration Date | Maximum Number of Uses | Remaining Number of Uses |
|-------------------------------------|--------|---|----------------|-----------|-----------------------------|-------------------------------|------------------|--------------------|----------------------|------------|-----------------|------------------------|--------------------------|
| <input checked="" type="checkbox"/> | Active | WORKS 8594079 T JOHNSON | 3152 | US/Canada | dz2-jk4-5zj | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a | n/a |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | io0-0nm-5x4 | MK-US | PA Approval Only | | | 2020-12-16 | 2020-12-19 | 5 | 5 |
| <input type="checkbox"/> | Active | EXPERIAN FILE TEST34 | 1086 | US/Canada | kg6-ir5-177 | MK-US | PA Approval Only | | | 2020-12-16 | 2022-12-16 | n/a | n/a |
| <input type="checkbox"/> | Active | WORKS TEST CC 8705504 | 2279 | US/Canada | 7j1-67j-q8j | MK-US | Approval Group | 1,500.00 | | 2020-09-22 | 2022-09-22 | 100 | 63 |
| <input type="checkbox"/> | Active | MCHIP ADV AUD TRVL | 6735 | APAC | x22-0ob-95n | MCHIP ADV AUD TRVL - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | PINCHECK SEK | 8422 | EMEA | 8ks-4by-97h | MCHIP ADV SEK COM - Test Key | PA Approval Only | | 2,500.00 | 2020-07-22 | 2022-07-22 | n/a | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV SEK COM | 6705 | EMEA | gv5-nb8-gu0 | MCHIP ADV DKK COM - Test Key | PA Approval Only | | | 2020-11-05 | 2022-11-05 | n/a | n/a |
| <input type="checkbox"/> | Active | MCHIP ADV DKK COM | 6101 | EMEA | e7v-r4f-i1g | BROADCOM 5800044 NOK CC | PA Approval Only | | 100.00 | 2020-08-13 | 2022-08-13 | n/a | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 2f2-o62-u4w | Single Group Approval | test | | | 2020-10-01 | 2022-10-01 | n/a | n/a |
| <input type="checkbox"/> | Active | BROADCOM 5800044 NOK CC | 7759 | EMEA | 09c-b9e-f6s | | | | | | | | |

1 Selected | 41 items

Show 10 per page

Page: 1 of 5

Disable

Download

Confirm Account Request Key(s) Dis...

Disable 1 account request key(s).

OK

Cancel

- Wählen Sie den gewünschten Kontoeröffnungs-Code aus, bearbeiten Sie die Parameter nach Bedarf und klicken Sie auf *Speichern*, um einen Kontoeröffnungs-Code zu bearbeiten.

Genehmiger verwalten

Im Zuge Ihrer Online-Kontoanfragen-Konfiguration können Sie Genehmigungsgruppen oder Panele festlegen. Die Verwendung von Genehmigungsgruppen und Panele ermöglicht es Ihrem Unternehmen, zusätzliche Genehmigungen für Online-Kontoanfragen zu verlangen. Die Verwendung einer einzelnen Gruppengenehmigung erfordert die Genehmigung eines Genehmigers aus der festgelegten Genehmigungsgruppe. Nach der Genehmigung wird der Antrag zur endgültigen Genehmigung an den Programmverwalter weitergeleitet. Die Verwendung von Genehmigungspaneelen erfordert die Genehmigung durch einen Genehmiger aus jeder der Genehmigungsgruppen, die Mitglieder des Genehmigungspanels sind. Einem Panel können maximal zwei Genehmigungsgruppen zugewiesen werden. Ein Genehmigungspanel verwendet einen festgelegten Genehmigungsauftrag, der vom Programmverwalter bearbeitet werden kann.

Erstellen von Genehmigungsgruppen

1. Gehen Sie zu *Verwaltung > Genehmiger verwalten* oben auf dem Dashboard für die Programmverwaltung.
2. Klicken Sie in der oberen rechten Ecke auf das Dropdown-Menü *Erstellen* und wählen Sie *Genehmigungsgruppe erstellen*.
3. Geben Sie einen Namen und eine Beschreibung der Genehmigungsgruppe ein (optional) und klicken Sie auf *Speichern*.
4. Das Fenster *Benutzer auswählen* wird angezeigt. Wählen Sie das Kontrollkästchen neben jedem Benutzer aus, der hinzugefügt werden soll, und klicken Sie auf *OK*.

Global Card Access

Home Account Requests

/ Administration / Manage App

Test 3

* Name: Test 3

Approvers Panels

Name

0 Selected | 0 items

Remove Selected Add Approver(s)

Select User(s)

Clear Filters

| | Last Name | First Name | User ID | Email Address |
|-------------------------------------|----------------------------|------------------------------|-----------------|---------------------------------|
| <input type="checkbox"/> | a<script>alert(1)</script> | a'><script>alert(3)</script> | qwerqwer | michael.ayer@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Priya | priya_grp | priyadharshini.sukumar@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Anusha | Anusha.Approver | anusha.kantu@bofa.com |
| <input checked="" type="checkbox"/> | Approver | Friday | FridayApp | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr2 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Approver | Friday | FridayAppr30 | james.r.patterson@bofa.com |
| <input type="checkbox"/> | ApproverTest | Group | Group Approver | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Test | Test.Auditor | anusha.kantu@bofa.com |
| <input type="checkbox"/> | Auditor | Approver | ApprAud | james.r.patterson@bofa.com |
| <input type="checkbox"/> | Auditor | Global | Global.Auditor1 | anusha.kantu@bofa.com |

3 Selected | 51 items Show 10 per page Page: 1 of 6

OK Cancel

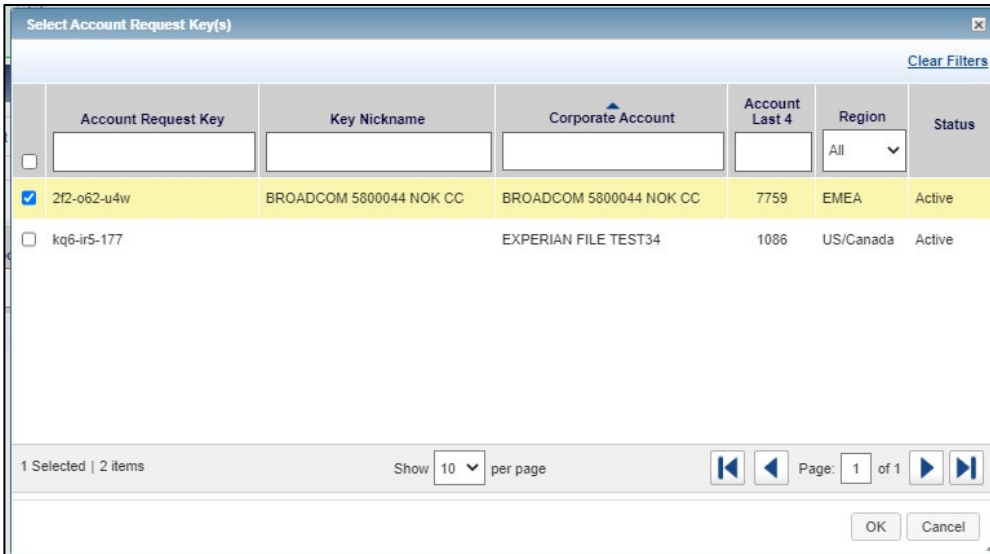
QL Test Company

Clear Filters

Last Login Date

Page: 1 of 0

5. Klicken Sie auf die Registerkarte *Codes*, um der Gruppe Kontoeröffnungs-Codes zuzuweisen.
6. Klicken Sie auf *Code(s) hinzufügen* und anschließend auf das Kontrollkästchen neben jedem Kontoeröffnungs-Code, den Sie hinzufügen möchten.
7. Klicken Sie auf *OK*.



| | Account Request Key | Key Nickname | Corporate Account | Account Last 4 | Region | Status |
|-------------------------------------|---------------------|-------------------------|-------------------------|----------------|-----------|--------|
| <input checked="" type="checkbox"/> | 2f2-o62-u4w | BROADCOM 5800044 NOK CC | BROADCOM 5800044 NOK CC | 7759 | EMEA | Active |
| <input type="checkbox"/> | kq6-ir5-177 | | EXPERIAN FILE TEST34 | 1086 | US/Canada | Active |

1 Selected | 2 items Show 10 per page Page: 1 of 1 OK Cancel

Bearbeiten von Genehmigungsgruppen

1. Gehen Sie zu *Verwaltung > Genehmiger verwalten* oben auf dem Dashboard für die Programmverwaltung.
2. Klicken Sie auf einen bestimmten Gruppennamen.
3. Wählen Sie zum Entfernen eines Genehmigers das Kontrollkästchen neben dem Namen des Genehmigers aus, klicken Sie auf *Auswahl entfernen* und dann auf *OK*.
4. Klicken Sie zum Entfernen von Kontoeröffnungs-Codes auf die Registerkarte *Codes*, wählen Sie das Kontrollkästchen neben jedem zu entfernenden Kontoeröffnungs-Code aus, klicken Sie auf *Entfernen* und anschließend auf *OK*.
5. Bearbeiten Sie den Text im Feld *Name* und *Beschreibung* und klicken Sie auf *Speichern*, um einen Gruppennamen oder eine Gruppenbeschreibung zu bearbeiten.
6. Wählen Sie das Kontrollkästchen für jede Gruppe aus, klicken Sie auf *Herunterladen*, wählen Sie eine Formatoption aus und folgen Sie den Anweisungen zum Speichern oder Öffnen der Datei, um Informationen zur Genehmigungsgruppe herunterzuladen.
7. Wählen Sie das Kontrollkästchen für den zu löschenden Gruppennamen aus und klicken Sie auf *Löschen*, gefolgt von *OK*, um eine Genehmigungsgruppe zu löschen.
Hinweis: Nach dem Löschen werden Kontoanfragen an den/die Programmverwalter weitergeleitet.

Erstellen von Genehmigungspanelen

1. Gehen Sie zu *Verwaltung > Genehmiger verwalten* oben auf dem Dashboard für die Programmverwaltung.
2. Klicken Sie in der oberen rechten Ecke auf der Seite auf das Dropdown-Menü *Erstellen* und wählen Sie *Genehmigungspanel erstellen*.
3. Geben Sie einen Namen und eine Beschreibung des Genehmigungspanels ein (optional) und klicken Sie auf *Speichern*.
4. Klicken Sie auf *Genehmigungsgruppe hinzufügen*, um dem Panel Gruppen hinzuzufügen.
Hinweis: Einem Panel können maximal zwei Genehmigungsgruppen zugewiesen werden.

Home Account Requests Administration

Administration / Manage Approvers / Groups and Panels / Panel Details

Panel 3

* Name:

Description:

Approval Groups

| Approval Order | Name | Description |
|--|------|-------------|
| There are no approval groups assigned to this panel. | | |

[+ Add Approval Group](#)

5. Klicken Sie auf *Speichern*.
8. Klicken Sie im Abschnitt „Zugewiesene Codes“ auf *Codes hinzufügen* und klicken Sie auf das Kontrollkästchen neben jedem Kontoeröffnungs-Code, den Sie hinzufügen möchten.
6. Klicken Sie auf *OK*.

Bearbeiten von Genehmigungspanelen


1. Gehen Sie zu *Verwaltung > Genehmiger verwalten* oben auf dem Dashboard für die Programmverwaltung.
2. Klicken Sie auf die Registerkarte *Panelle* und wählen Sie dann den spezifischen Panelnamen aus, den Sie bearbeiten möchten.
3. Um eine Genehmigungsgruppe zu entfernen, klicken Sie auf das X neben dem Namen der Genehmigungsgruppe und anschließend auf *Speichern*.
4. Klicken Sie in der Dropdown-Liste auf „Genehmigungsauftrag“, wählen Sie eine Zahlenoption für jede Gruppe aus und klicken Sie auf *Speichern*, um die Reihenfolge der Genehmigungsgruppen zu ändern.
5. Klicken Sie auf *Code(s) hinzufügen*, um einen Kontoeröffnungs-Code hinzuzufügen. Wählen Sie das Kontrollkästchen für jeden Kontoeröffnungs-Code aus, der dem Panel hinzugefügt werden soll, und klicken Sie auf *OK*.
6. Wählen Sie zum Entfernen eines Kontoeröffnungs-Codes das Kontrollkästchen für jeden zu entfernenden Kontoeröffnungs-Code aus, klicken Sie auf *Entfernen* und anschließend auf *OK*.
7. Bearbeiten Sie bei Bedarf den Text in den Feldern *Name* und *Beschreibung* und klicken Sie auf *Speichern*, um einen Panelnamen oder eine Gruppenbeschreibung zu bearbeiten.

8. Wählen Sie das Kontrollkästchen für jedes Panel aus, klicken Sie auf *Herunterladen*, wählen Sie eine Formatoption aus und folgen Sie den Anweisungen zum Speichern oder Öffnen der Datei, um Informationen zum Genehmigungspanel herunterzuladen.
 9. Wählen Sie das Kontrollkästchen für den zu löschenden Panelnamen aus und klicken Sie auf *Löschen*, gefolgt von *OK*, um ein Genehmigungspanel zu löschen.
- Hinweis:* Nach dem Löschen werden Kontoanfragen an den/die Programmverwalter weitergeleitet.

Abschließen und Genehmigen von Kontoanträgen (Video-Tutorial)

1. Gehen Sie zu *Kontoanfragen > Genehmigungen – Programmverwalter* oben im Dashboard für die Programmverwaltung oder zu *Kontoanfragen verwalten* im Schnellmaßnahmen-Menü.

[Home](#)
[Account Requests](#)
[Administration](#)

 / [Account Requests](#) / [Approvals - Program Administrator](#)

Account Requests - Program Administrator

Awaiting Approval

Submitted Requests

Completed Requests

Errors 1

Clear Filters

| | Applicant | Embossed Name 1 | Corporate Account | Submitted | Account Request Key | Account Request ID |
|-----------------------|--------------------|-----------------|---|----------------------|-----------------------------|--------------------|
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:29 CST | 7j1-67j-q8l | 244624 |
| <input type="radio"/> | Medikonda, Keerthi | US | WORKS TEST CC 8705504 | 2020-12-16 01:28 CST | 7j1-67j-q8l | 244623 |
| <input type="radio"/> | Smith, Joey | JOEY SMITH | WORKS 8594079 T JOHNSON | 2020-12-09 17:48 CST | ra1-ij1-6ux | 244613 |
| <input type="radio"/> | sample, test | TESTING | WORKS TEST CC 8705504 | 2020-11-16 00:49 CST | 7j1-67j-q8l | 244572 |
| <input type="radio"/> | Corner, Lex | TOKENTEST | MCHIP ADV CHF COM | 2020-11-11 07:22 CST | yo2-oo9-jt9 | 244571 |

2. Wählen Sie das Optionsfeld neben der gewünschten Kontoanfrage aus und klicken Sie auf *Abschließen und genehmigen*.
3. Überprüfen Sie die Kartenanmeldungsinformationen und bearbeiten Sie bei Bedarf alle Kontodetails.

Hinweis: Sie müssen überprüfen, ob die richtige Adresse eingegeben wurde, um eine erfolgreiche Kartenzustellung sicherzustellen.

4. Klicken Sie auf *Genehmigen*, um den Antrag zu genehmigen, oder auf *Ablehnen*, um den Antrag abzulehnen, sobald Ihre Prüfung und/oder Bearbeitung abgeschlossen ist.

Hinweis:

- Antragssteller erhalten eine E-Mail, in der die Genehmigung oder Ablehnung der Kontoanfrage bestätigt wird, es sei denn, der Kontoeröffnungs-Code wurde auf *E-Mails an Antragssteller ausblenden* gesetzt.
- Wenn die Kontoanfrage abgelehnt wird, muss der Mitarbeiter eine neue Kontoanfrage erstellen, falls sie erforderlich ist.
- Als Programmverwalter können Sie eine bestimmte Anfrage, die eine Gruppengenehmigung erfordert, umgehen, indem Sie auf die Registerkarte *Eingereichte Anfragen* gehen, das Kontrollkästchen neben dem Antragssteller anklicken und auf *Umgehen* klicken. Sie müssen einen Kommentar zur Begründung für die Umgehung abgeben.

Umgang mit Kontoantragsfehlern (nur USA)

Für US-Programme können Programmverwalter Adressfehler beheben, die bei Kontoanträgen identifiziert wurden. Adressfehler bestehen aus Diskrepanzen zwischen dem Bundesstaat und der Postleitzahl, die in einem Kontoantrag angegeben sind. Diese Funktion ist nur für US-Programme verfügbar.

1. Gehen Sie zu *Kontoanfragen > Genehmigungen – Programmverwalter* oben im Dashboard für die Programmverwaltung oder zu *Kontoanfragen verwalten* im Schnellmaßnahmen-Menü.
2. Klicken Sie auf die Registerkarte *Fehler*.

Hinweis: Auf der Registerkarte „Fehler“ wird eine Zahl angezeigt, wenn Fehler bei der Adresse des Kontoantrages identifiziert wurden.

3. Wählen Sie das Optionsfeld neben dem gewünschten Bewerber.
4. Klicken Sie auf *Korrigieren und erneut senden*.

Home Account Requests Administration

/ Account Requests / Approvals - Program Administrator

Account Requests - Program Administrator

Awaiting Approval Submitted Requests Completed Requests Errors 1 Clear Filters

| Applicant | Error | Embossed Name 1 | Errors Account | Submitted | Account Request Key | Account Request ID | Approved By | Approved Date | |
|-----------------------|-------------------|----------------------|------------------|---------------------------------------|----------------------|-----------------------------|-------------|---------------|----------------------|
| <input type="radio"/> | Creation, Request | View | REQUEST CREATION | WORKS TEST CC 8705504 | 2020-11-11 06:25 CST | 711-871-981 | 244570 | GPA, Anusha | 2020-11-11 06:26 CST |

1 Selected | 1 item Show 10 per page Page: 1 of 1

Reject **Correct & Resubmit**

5. Bearbeiten Sie den Bundesstaat und/oder die Postleitzahl im Abschnitt „Adresse“, falls erforderlich.
6. Klicken Sie auf *Erneut senden*. Der Antrag wird dann aus der *Fehler*-Warteschlange in die Warteschlange *Abgeschlossene Anträge* verschoben.

Einsehen und Herunterladen abgeschlossener Kontoanfragen

1. Gehen Sie zu *Kontoanfragen > Genehmigungen – Programmverwalter* oben im Dashboard für die Programmverwaltung oder zu *Kontoanfragen verwalten* im Schnellmaßnahmen-Menü.
2. Klicken Sie auf die Registerkarte *Abgeschlossene Anträge*.
3. Wählen Sie den Bewerber aus, dessen Bewerbung Sie einsehen möchten, und klicken Sie auf *Vollständige Details ansehen*.
4. Wählen Sie das Kontrollkästchen neben jedem Kontoeröffnungs-Antrag aus, den Sie herunterladen möchten.
5. Klicken Sie auf „Herunterladen“.

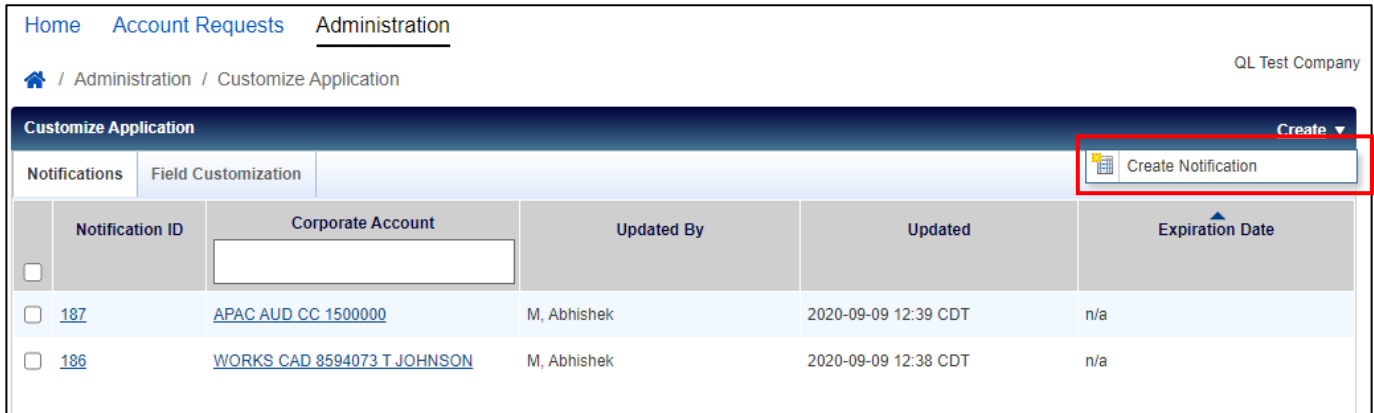
- Wählen Sie das Download-Format aus und folgen Sie den Aufforderungen zum Speichern oder Öffnen der Datei.

Anträge anpassen

Sie können Kartenanträge anpassen, indem Sie entweder eine Benachrichtigung hinzufügen, die den Bewerbern oben auf dem Kontoantragsformular angezeigt wird, oder indem Sie die interne Kennung anpassen, die von den Bewerbern während des Online-Kartenantragsprozesses angefordert wird.

Benachrichtigungen

- Gehen Sie zu *Verwaltung* → *Antrag verwalten* oben auf dem Dashboard für die Programmverwaltung.
- Wenn Sie bereits Benachrichtigungen eingerichtet haben, werden diese in dieser Ansicht angezeigt. Klicken Sie oben rechts auf das Dropdown-Menü *Erstellen*, wenn Sie eine neue Benachrichtigung hinzufügen möchten.
- Klicken Sie auf *Benachrichtigung erstellen*.



Home Account Requests Administration

QL Test Company

Administration / Customize Application

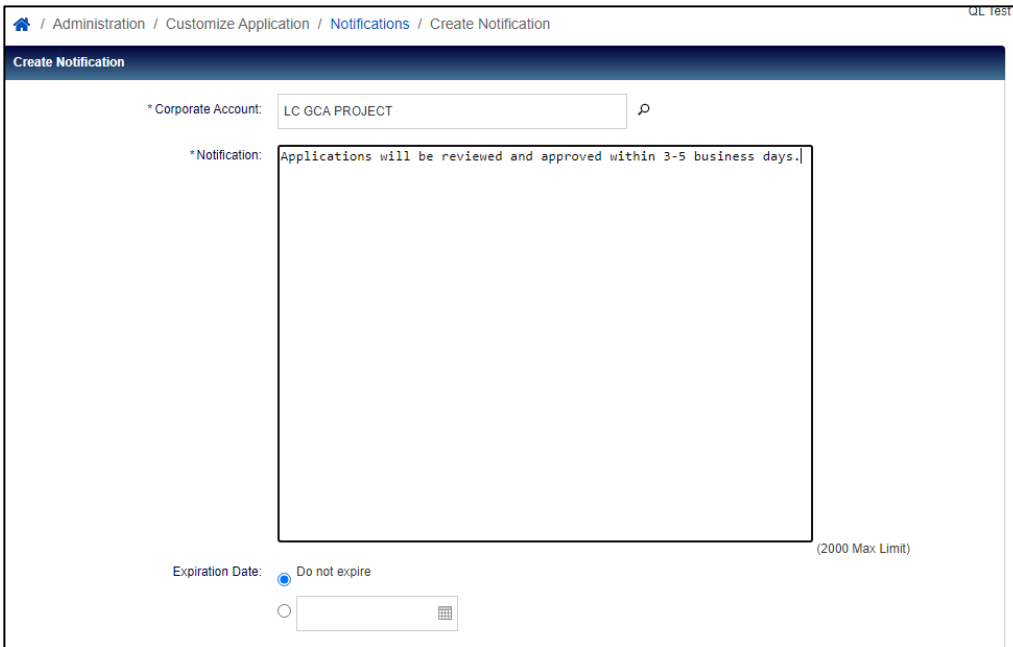
Customize Application

Notifications Field Customization Create

Create Notification

| | Notification ID | Corporate Account | Updated By | Updated | Expiration Date |
|--------------------------|---------------------|---|-------------|----------------------|-----------------|
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | 187 | APAC AUD CC 1500000 | M, Abhishek | 2020-09-09 12:39 CDT | n/a |
| <input type="checkbox"/> | 186 | WORKS CAD 8594073 T JOHNSON | M, Abhishek | 2020-09-09 12:38 CDT | n/a |

- Wenn Sie über mehrere Firmenkonten verfügen, müssen Sie auswählen, zu welchem Firmenkonto Sie die Benachrichtigung hinzufügen möchten. Klicken Sie nach der Auswahl des Firmenkontos auf *OK*.
- Geben Sie den gewünschten Benachrichtigungstext in das Textfeld *Benachrichtigung* ein und wählen Sie ein Ablaufdatum für die Nachricht aus (optional).

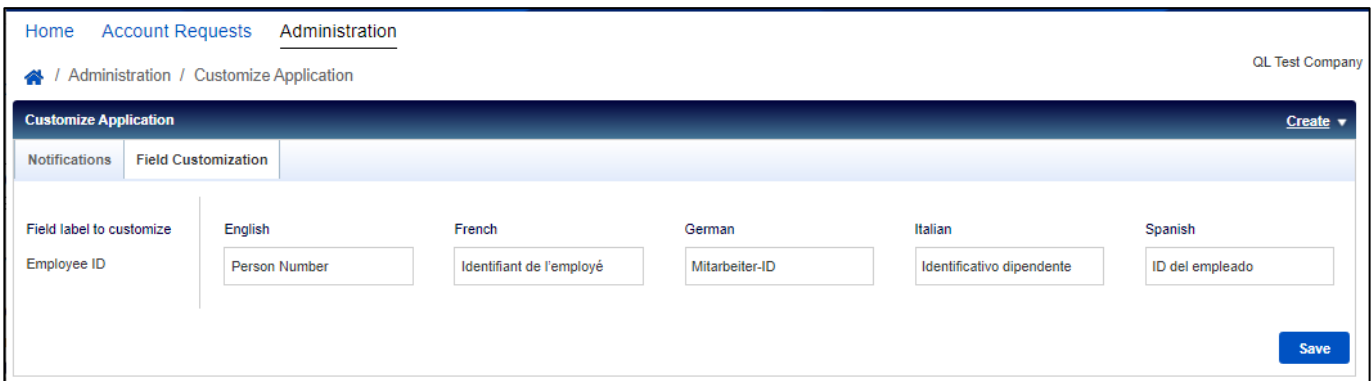


6. Klicken Sie auf *Speichern*.
7. Sie können die von Ihnen erstellten Benachrichtigungen jederzeit bearbeiten, indem Sie auf die *Benachrichtigungs-ID* klicken. Klicken Sie auf das Kontrollkästchen neben der Benachrichtigungs-ID und klicken Sie auf *Läuft jetzt ab* und anschließend auf *OK*, um eine Benachrichtigung zu löschen.

Anpassen des Feldes

1. Gehen Sie zu *Verwaltung* → *Antrag verwalten* oben auf dem Dashboard für die Programmverwaltung.
2. Klicken Sie auf die Registerkarte *Anpassen des Feldes*.
3. Das Standard-Mitarbeiterkennungsfeld für Kartenanträge ist die Mitarbeiter-ID. Geben Sie die neue Bezeichnung, die Sie den Bewerbern auf den Online-Kartenanträgen anzeigen möchten, in das Textfeld *Englisch* ein, wenn Sie die Bezeichnung dieses Feldes in eine andere Art von interner Kennung ändern möchten.

Hinweis: Die Feldbezeichnung „Mitarbeiter-ID“ kann bis zu 30 Zeichen umfassen.



4. Geben Sie den übersetzten Wert der neuen Feldbezeichnung auf Französisch, Deutsch, Italienisch und Spanisch ein.
5. Klicken Sie auf *Speichern*.

Benutzer-Anmeldungsbericht

Programmverwalter können einsehen, welche einzelnen Benutzer für Global Card Access registriert sind oder nicht.

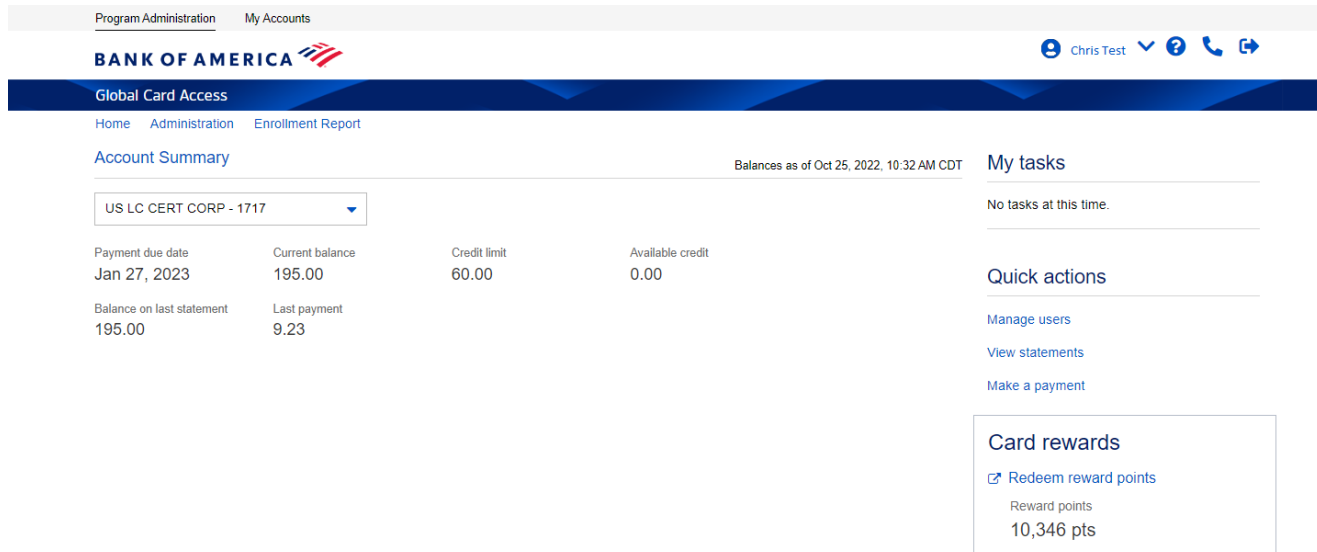
1. Gehen Sie oben im Dashboard für die Programmverwaltung zu *Anmeldungsbericht*.
2. Der Anmeldungsbericht wird mit allen Kartenkonten angezeigt, die in Ihrem Geltungsbereich liegen.
 - a. Über jeder Spalte steht ein Filter zur Verfügung, mit dem Sie einfacher suchen können.
 - b. Verwenden Sie zum Filtern nach bestimmten Firmenkonten den erweiterten Filter auf der linken Seite.
 - c. Wenn der Karteninhaber seine Karte nicht in Global Card Access registriert hat, wird „Kein dazugehöriger Benutzer“ als Benutzername angezeigt.

| Program Administration | | My Accounts | | srijani gp | |
|--|--------------------------|--------------|----------------|---------------------------|-------------|
| BANK OF AMERICA | | | | | |
| Global Card Access | | | | | |
| Home Account Requests Administration Enrollment Report | | | | | |
| Enrollment Report | | | | | |
| Clear Filters | | | | | |
| Advanced Filter | User Name | Name on Card | Account Last 4 | Corporate Account | Card Status |
| <input type="checkbox"/> Corporate Account - All | <input type="checkbox"/> | | | | Active |
| | 0105, GodProxy | WILLIAM GOAT | 5800 | EXPERIAN FILE TEST34-1005 | Active |
| | 1, proxy | DELETE TEST | 4322 | AUTOM CC 6600948 #1-0435 | Active |
| | 1, proxy | TONI HODSON | 7374 | EXPERIAN FILE TEST34-1005 | Active |
| | 1086, Proxy | | 7911 | EXPERIAN FILE TEST34-1005 | Active |
| | 2, proxy | 2520CARD | 2893 | PINCHECK SEK-8422 | Active |
| | 2520, check | | 8350 | PINCHECK SEK-8422 | Active |

3. Wählen Sie das Kontrollkästchen für jedes Konto aus, das Sie im Bericht anzeigen möchten, und klicken Sie auf „Herunterladen“, um den Anmeldungsbericht herunterzuladen.
4. Wählen Sie das Download-Format aus und folgen Sie den Aufforderungen zum Speichern oder Öffnen der Datei.

Mein Konto

Global Card Access ermöglicht Administratoren über die Registerkarte „Meine Konten“ den Zugriff auf ihre eigenen individuellen Kartenkonten.



Program Administration My Accounts

BANK OF AMERICA

Chris Test

Global Card Access

Home Administration Enrollment Report

Account Summary Balances as of Oct 25, 2022, 10:32 AM CDT

US LC CERT CORP - 1717

| | | | |
|---------------------------|-----------------|--------------|------------------|
| Payment due date | Current balance | Credit limit | Available credit |
| Jan 27, 2023 | 195.00 | 60.00 | 0.00 |
| Balance on last statement | Last payment | | |
| 195.00 | 9.23 | | |

My tasks

No tasks at this time.

Quick actions

Manage users

View statements

Make a payment

Card rewards

Redeem reward points

Reward points

10,346 pts

- Informationen zum Hinzufügen eines Kontos zu Ihrem bestehenden Global Card Access-Profil, zum Zusammenführen mehrerer Konten in Global Card Access oder zum Bearbeiten Ihres Profils in Global Card Access finden Sie unter [So verwalten Sie Ihr Konto in Global Card Access](#)
- Informationen zum Einsehen Ihrer PIN finden Sie unter [Wie Sie Ihre Chip- und PIN-Karte verwenden](#)
- Informationen zum Ändern Ihrer PIN finden Sie unter [So ändern Sie Ihre PIN in Global Card Access](#)
- Informationen zum Einrichten von Benachrichtigungen finden Sie unter [So richten Sie Benachrichtigungen in Global Card Access ein](#)
- Informationen zum Einsehen Ihrer Abrechnungen finden Sie unter [So zeigen Sie Ihre Abrechnung in Global Card Access an](#)
- Informationen zum Sperren/Entsperren Ihrer Karte finden Sie unter [So sperren und entsperren Sie Ihre Karte in Global Card Access](#)
- Informationen zur Durchführung einer Zahlung finden Sie unter [Zahlungsanweisungen für Karteninhaber](#) (nur Nordamerika).
- Weitere Informationen zur starken Kundenauthentifizierung (SCA) finden Sie auf der [SCA-Website](#) (nur EMEA)
- Weitere Informationen zum Konto-Support, verfügbare Prämienarten und die Nutzung von Punkten finden Sie in den [FAQs zu Premium-Rewards](#) (nur USA)