Match a Corporate Card to an Employee

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Permissions

You will require an Access Role with the following permissions:

- Employees
- Corporate Card Imports

Method 1

Method 1: Matches a corporate card and previous transactions to an employee

- 1. Navigate from the Home page to Administrative Settings | Imports/Exports | Corporate Card Imports.
- 2. Locate the Corporate Card Statement which uses the card that you need to allocate.
- Click the number in the Unallocated Cards column of the grid. This will direct you to the Unallocated Cards page which will display each of the cards which you are able to match to an employee.

	×	HSBC 552 statement imported 02/12/2019 11:48:58	HSBC 552	02/12/2019	02/12/2019	7	1
2	×	HSBC 552 statement imported 02/12/2019 11:50:39	HSBC 552	02/12/2019	02/12/2019	7	- Im
2	×	HSBC 552 statement imported 02/12/2019 11:50:58	HSBC 552	02/12/2019	02/12/2019	7	1

4. Locate the card and click Match Number.

Unallocated Cards		
Card Number	Match Number	
XXXXX1234	Match Number	
	0	

- 5. This will display a modal where you can search for an employee by **Surname** or **Username**. Click **Save** to perform the search based on the criteria you have entered.
- 6. Relevant search results will appear. Select the check box against the employee and then click **Save**.

Select	Username	Name	Group	Department	Cost Code
	Alex	Earle,Mrs Alex	Manager	Department1	CC3
save	cancel				

7. The corporate card will now be matched to that employee.

Method 2

Method 2: Matches a corporate card to an employee but only applies to future transactions.

- 1. Navigate from the Home page to Administrative Settings | User Management | Employees.
- 2. Search for the employee that you want to assign the corporate card to.
- 3. Click 📝 next to the employee to edit their employee record.
- 4. Click **Corporate Cards** within the Page Options menu. This will display a list of any existing Corporate Cards which have been assigned to the employee.



5. Click **New Corporate Card** from the Page Options sub menu. This will display a modal that allows you to specify the details of the Corporate Card.

Employee: Alex Employee Details Corporate Cards					
1	×	Card Type 🔺	Card Provider	Card Number	Active
2	×	Credit Card	Automatic HSBC	0004555989990210225	1
2	×	Credit Card	RBS Credit Card	100000******8376	

6. Complete the following details:

Field	Description
Card Provider	Select the relevant Card Provider from the drop down list. For additional corporate card providers, contact your Account Manager on 01522 881300.
Card Number	Enter the long Card Number which is present on the front of the card.
Active	Select this check box to set the card as active for this employee. Leaving this unchecked will restrict the employee from reconciling items on this card.

- 7. Click **Save** to store the card against this employee. This will then be shown in the list of existing cards which are assigned to the employee.
- 8. Click **Save** on the Employee Details page.