OKLAHOMA
Office of Management
& Enterprise Services

Changing spend control profiles in Bank of America Works user guide

Overview

This guide provides steps to change spend control profiles in Bank of America Works application.

Procedure

Step 1. Access the cardholder account from the Accounts Dashboard on the Bank of America Works Home page (Figure 1).

Figure 1. Accounts Dashboard.

Step 2. In the Account ID column, select either the last four numbers of the card number or use the drop-down arrow to the right of the four numbers to display additional options.
  A. Select **View Full Details**.
  B. The authorization log can also be viewed from this location, providing information regarding transactions a merchant has process for payment, as well as reasons for declined transactions.

Step 3. The Account Details Screen displays (Figure 2).
  A. Select the **Spend Control Profile** tab.
  B. Select the drop-down arrow to the right of the Current Profile to display options.
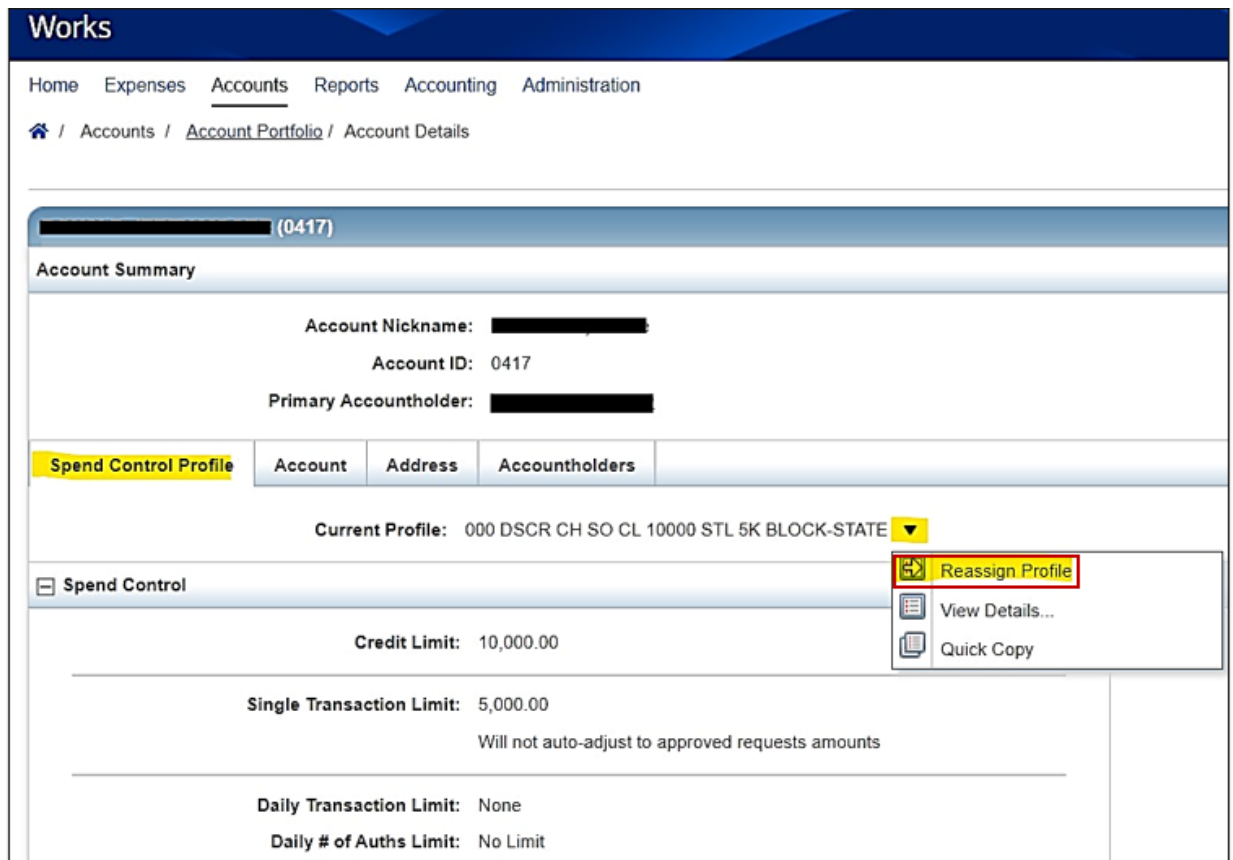 **C.** Select **Reassign Profile**.

Figure 2. Spend Control Profile Tab.

Step 4. The Select Spend Control Profile screen displays (Figure 3).
  A. Select the **Show** drop-down arrow to change the number of profiles that display per page or scroll through the list to locate the correct profile to move the card into.
    i. Enter an amount in the Credit Limit and/or Single Transaction Limit text fields to limit the search results.
    ii. Select the radio button next to the correct profile.
    iii. Select the **Assign** button.

Last reviewed date 12/13/2024
Last revised date 12/13/2024
Page **2** of **4**

Figure 3. Select Spend Control Profile Name.

Step 5. When the Schedule Return screen displays (Figure 4):

    A. Select **OK** to leave the card in the new profile indefinitely.

    B. If preferred, select the **Yes, return on:** radio button and use the calendar icon to select the date to return the card to the original profile.

    C. Select **OK** to move the card into a new profile.

Figure 4. Schedule Return.

Step 6. Enter **TVL** in the text field and use the same process to locate travel specific profiles (Figure 5).

    A. Notice these profiles will completely exclude any transportation charges.

    B. If transportation charges need to be paid while in travel status, then the card will need to be placed into another profile type that allows payment for vehicle rental or taxi fares.

		Spend Control Profile Name	Credit Limit	Discretionary Funds	Single Transaction Limit
○	⊞		3,500.00	3,500.00	2,000.00
○	⊞		3,500.00	3,500.00	2,000.00
○	⊞	TVL DSCR CH SIGN: CL 1000; STL 1000; MCCG AIR ONLY	1,000.00	1,000.00	1,000.00
○	⊞	TVL DSCR CH SIGN: CL 1000; STL 1000; MCCG AIR-HOTEL CAR RNT ONLY	100,000.00	100,000.00	5,000.00
○	⊞	TVL DSCR CH SIGN: CL 1000; STL 1000; MCCG AIR-HOTEL ONLY	1,000.00	1,000.00	1,000.00
○	⊞	TVL DSCR CH SIGN: CL 1000; STL 1000; MCCG HOTEL ONLY	1,000.00	1,000.00	1,000.00
○	⊞	TVL DSCR CH SIGN: CL 10000; STL 5000; MCCG AIR ONLY	10,000.00	10,000.00	5,000.00
○	⊞	TVL DSCR CH SIGN: CL 10000; STL 5000; MCCG AIR-HOTEL ONLY	10,000.00	10,000.00	5,000.00
○	⊞	TVL DSCR CH SIGN: CL 10000; STL 5000; MCCG HOTEL ONLY	10,000.00	10,000.00	5,000.00
○	⊞	TVL DSCR CH SIGN: CL 100000; STL 5000; MCCG AIR-HOTEL ONLY	100,000.00	100,000.00	5,000.00

0 Selected | 109 items   Show [10 ▼] per page   ◁◁ ◁ Page: [1] of 11 ▷ ▷▷

Assign   Cancel

Figure 5. TVL Spend Control Profile Name.