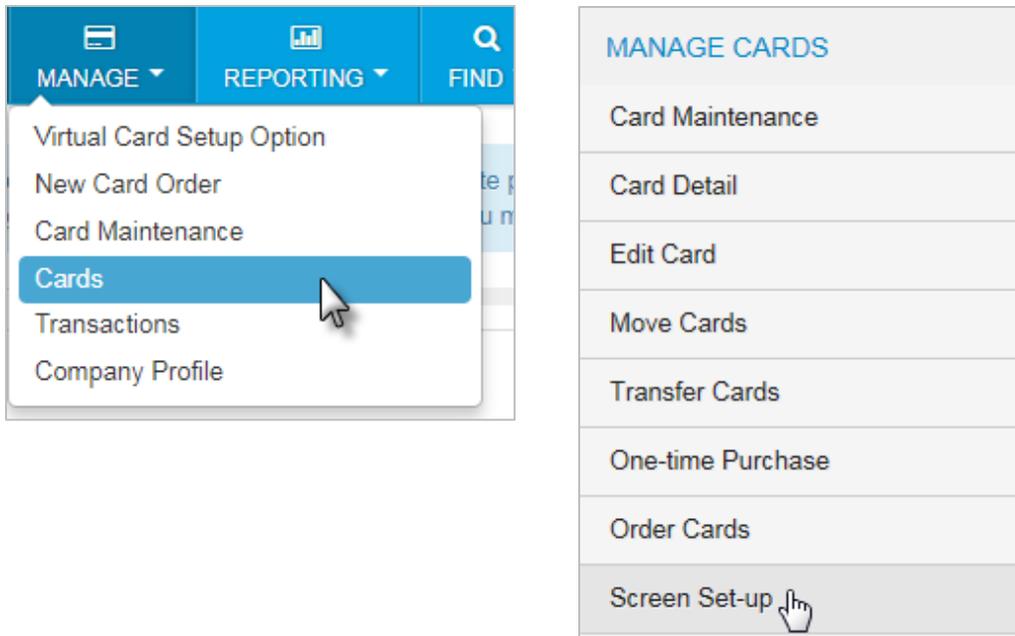


Classic Card Maintenance: Setting Up a Virtual Card Order

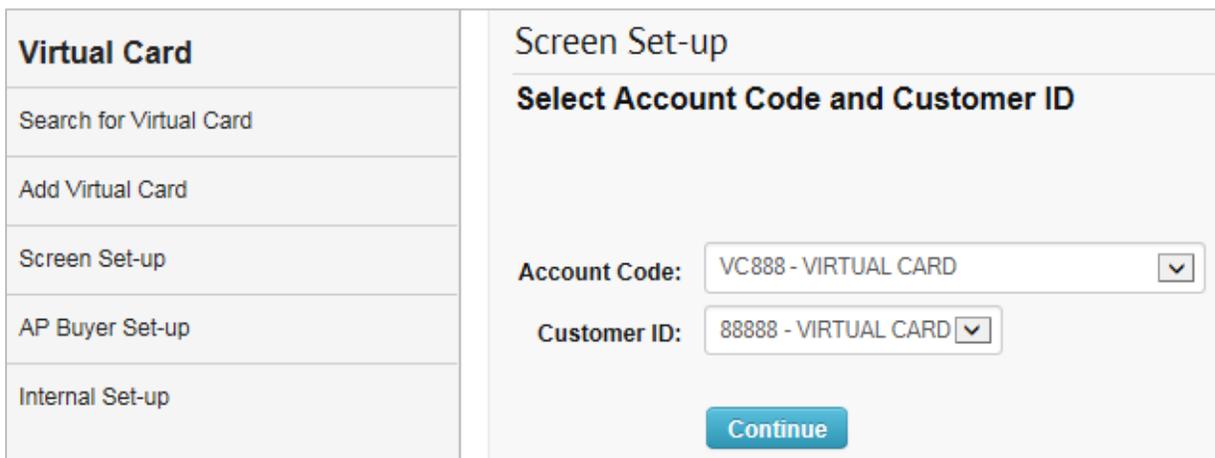
ICD > Manage > Cards > Screen Set-up

The Screen Set-up page allows account administrators to modify the information fields needed to issue a virtual card in iConnectData (ICD). This enables you to customize the Add a Virtual Card page to adhere to your company's requirements, such as limits by merchant groups, invoice details, and discretionary data.

1. To access the Screen Set-up page from the ICD menu bar, select **Manage > Cards > Screen Set-up**.



2. Select an account code and customer ID setup for issuing virtual cards. Then, click **Continue**.



The image shows the 'Screen Set-up' form. On the left is a sidebar with options: Virtual Card, Search for Virtual Card, Add Virtual Card, Screen Set-up, AP Buyer Set-up, and Internal Set-up. The main form area is titled 'Screen Set-up' and 'Select Account Code and Customer ID'. It contains two dropdown menus: 'Account Code' with the value 'VC888 - VIRTUAL CARD' and 'Customer ID' with the value '88888 - VIRTUAL CARD'. A blue 'Continue' button is located at the bottom.

3. The Screen Set-up page lists all the fields that you can require or make optional on the Add a Virtual Card page. For example, to require users to enter GL code assignments each time they issue a virtual card, select the **Required** check box next to **Assign GL Codes**. Likewise, you can make it optional for users to enter a driver ID by selecting the **Display** check box next to **Driver ID Number**.

In addition, you can edit a field name (label) as needed in the **Label** column. You will receive an error if you duplicate field names.

Note: If your account is set up for virtual card for travel (VCT), some fields will default to a specific name.

Description	Display	Required	Label
Assign GL Codes:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Invoice Due Date:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Invoice Due Date
First Name:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	First Name
GL Validation:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	GL Validation
Invoice Comments:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Invoice Comments
Invoice Date:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Invoice Date
Last Name:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Last Name
Misc. Costs:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Misc. Costs
Payment Date:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Payment Date
Payment Number:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Payment Number
PO Number:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Number
Driver ID Number:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Driver ID Number
Repair Order Number:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Repair Order Number
Total Labor Costs:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Total Labor Costs
Total Parts Cost:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Total Parts Cost
Total Tax Cost:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Total Tax Cost
Vehicle Number:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vehicle Number
Vendor Invoice Number:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vendor Invoice Number
Location Code:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Location Code
Vendor Name:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vendor Name
Vendor Number:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vendor Number
Virtual Card Invoice Number:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Virtual Card Invoice Number
Warranty Period:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Warranty Period
Warranty Report:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Warranty Report
Select All MCC Groups:	<input type="checkbox"/>		
Business Services Group:	<input type="checkbox"/>		
Financial Group:	<input type="checkbox"/>		
Fuel Group:	<input type="checkbox"/>		
Legal, Insurance Group:	<input type="checkbox"/>		
Maintenance Only Group:	<input type="checkbox"/>		
Medical Group:	<input type="checkbox"/>		
Miscellaneous Group:	<input checked="" type="checkbox"/>		
T & E Group, Airlines:	<input checked="" type="checkbox"/>		
T & E Group, Hotels / Motels:	<input type="checkbox"/>		
T & E Group, Misc. Transportation:	<input checked="" type="checkbox"/>		
T & E Group, Rental Car:	<input type="checkbox"/>		
T & E Group, Restaurants:	<input checked="" type="checkbox"/>		

Description	Comments
Assign GL Codes	Includes a table for assigning general ledger (GL) codes to the virtual card being issued.
Invoice Due Date	The date the invoice is due; defaults to Check In Date for VCT orders.
First Name	First name of vendor being paid; defaults to Traveler First Name for VCT orders.

Description	Comments
GL Validation	This option does not display a field on screen, but validates that any GL codes a user enters are accurate. If an inaccurate GL code is entered, and this field is checked, the system will display an error.
Invoice Comments	Allows the user to enter any comments related to the invoice. Defaults to Comments for VCT orders.
Invoice Date	Date listed by the vendor on the invoice.
Last Name	Last name of vendor being paid; defaults to Traveler Last Name for VCT orders.
Misc. Costs	Select this option to allow or require that miscellaneous costs are specified for the virtual card; this option is generally used with the Total Parts Cost , Total Tax Cost , and Total Labor Costs fields. Note: Selecting Required with any of the cost options will require users to enter a value; it will not tabulate the values to ensure they equal the total amount issued to the card.
Payment Date	The date payment is issued. Defaults to Check Out Date for VCT orders.
Payment Number	Vendor-assigned number for the invoice being paid. This field can also be used for any discretionary data you want users to enter.
PO Number	Allows users to enter a purchase order number related to the invoice.
Driver ID Number	Virtual cards are not issued to drivers. This field can be used for any discretionary data you want users to enter.
Repair Order Number	Vendor-assigned number if the virtual card is issued for repairs.
Total Labor Costs	Select this option to allow or require that total labor costs are specified for the virtual card. This option is generally used with the Total Parts Cost , Total Tax Cost , and Misc. Costs fields. Note: Selecting Required with any of the cost options will require users to enter a value; it will not tabulate the values to ensure they equal the total amount issued to the card.
Total Parts Cost	Select this option to allow or require that total parts costs are specified for the virtual card. This option is generally used with the Total Labor Cost , Total Tax Cost , and Misc. Costs fields. Note: Selecting Required with any of the cost options will require users to enter a value; it will not tabulate the values to ensure they equal the total amount issued to the card.
Total Tax Cost	Select this option to allow or require that total tax costs are specified for the virtual card. This option is generally used with the Total Parts Cost , Total Labor Cost , and Misc. Costs fields. Note: Selecting Required with any of the cost options will require users to enter a value; it will not tabulate the values to ensure they equal the total amount issued to the card.

Description	Comments
Vehicle Number	The number assigned to the vendor in your accounting system for the selected customer ID.
Vendor Invoice Number	The Vendor Invoice Number can be entered if it is known at the time the card is being issued. This field can also be completed later when editing the virtual card.
Location Code	A 5-digit alphanumeric code associated with the vendor's location.
Vendor Name	Used to enter the full name of the vendor being paid; defaults to Hotel Name for VCT orders.
Virtual Card Invoice Number	Used to enter the invoice number for which the virtual card is issued. Also, can be used for discretionary data you want to make optional or required with a card.
Warranty Period	Allows users to enter the length of a warranty period, such as 30 days.
Warranty Report	A Yes or No field that allows users to indicate whether the product or service charged to the virtual card includes a warranty period.
Select All MCC Groups	This option determines which Merchant Category Code (MCC) groups can be selected when a virtual card is restricted to only a certain MCC group (when the user selects Open for a MasterCard Group(s) on the Add a Virtual Card or Edit a Virtual Card page).
MCC Groups	Specify one or more of these MCC groups if you did not select the Select All MCC Groups check box. You must select at least one of the MCC groups from the list if you have not selected Select All MCC Groups .

4. When finished, click **Submit** at the bottom of the Screen Set-up page to save your changes. You should receive a success message upon doing so.

Screen Set-up

Select Account Code and Customer ID

Setup successfully updated.

Account Code: ▼

Customer ID: ▼

[Continue](#)