iConnectData (ICD)
New Card Maintenance
User Guide

Updated: 04/07/2015

Contents of this Guide

Overview

After gathering much input from customer feedback, a New Card Maintenance application was launched in December 2013. The new Card Maintenance (**New ICD > Manage > New Card Maintenance**) totally redesigns the ICD interface and simplifies essential tasks such as searching for cards, updating cards, and editing cards.

The New Card Maintenance currently includes:

- **Smart Search.** Search for cards across all available account codes and customer IDs, with additional options to perform a partial search and filter searches by card details or status. **Note:** Due to performance issues, if you have access to 100 or more customer IDs, the search will filter to your first available account code and customer ID by default.

- **Multi-Card Update.** Make updates to multiple cards simultaneously.

- **Enhanced Card Detail.** Edit card details on a single page featuring enhanced graphics.

- **Transaction History and Decline.** For MasterCard and Proprietary card users, the Card Detail section lists your 10 most recent transactions within the previous 30 days. For MasterCard customers, this section will also lists the 10 most recent declined transactions within the previous 30 days.

- **Recent Card Updates.** This section displays the information on any updates made to a card , such as the user name, date and the specific change.

As we continue to develop this application, more features will be released that will improve your card maintenance experience. This document covers each feature that is currently available.

Note: New Card Maintenance does not apply to customers using Comdata's Prepaid solution. If you are a Prepaid customer, you must use your standard Card Maintenance feature.

Access New iConnectData

There are two ways to get to new iConnectData (ICD).

1. Go to www.comdata.com and select **Login**. Then, enter your user ID.
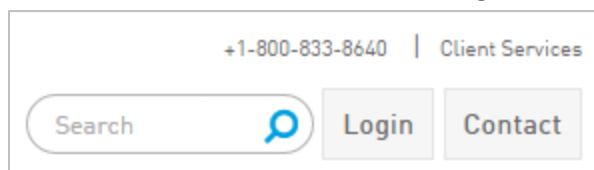
2. In the browser address bar, enter the following address:
    https://w6.iconnectdata.com/Login/init

    If you are on the old ICD, change the "l" in login to an uppercase "L" and hit enter.
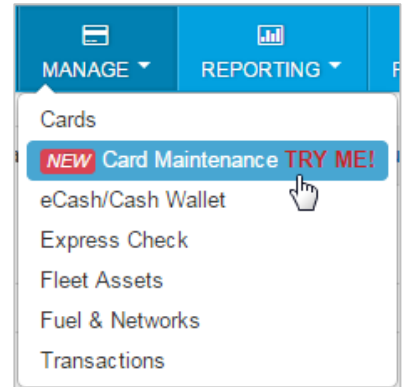   https://www.iconnectdata.com/**l**ogin/init

Searching for a Card

ICD > Manage > New Card Maintenance

Use the Smart Search tool to search for one or more cards.

1. Access the New Card Maintenance page from the ICD menu bar (**Manage > New Card Maintenance**).

2. In the search field, enter the beginning of a search term such as the cardholder's first name, last name, employee ID, card number, or unit/vehicle number. You can enter as few as two letters or numbers.
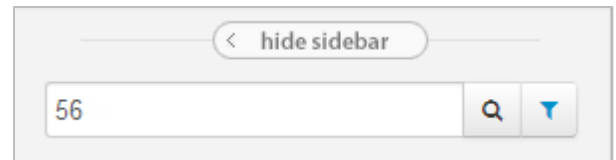
    If searching by card number, enter two numbers to pull all results containing those numbers. If searching by any other value, enter two letters or numbers to pull all matching results containing those values in the first two positions (example: search jo; results, johnson, JO2423, etc.).

    OR

    Select the filter button ( ) to display your filter options.
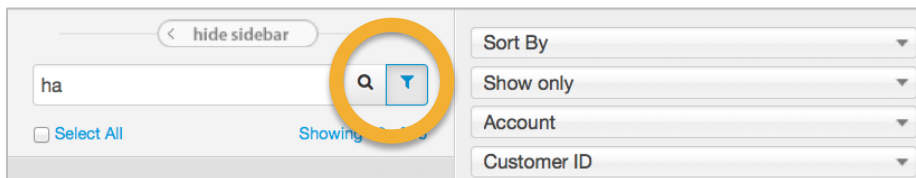
    > **Note:** If you have 300 or more customer IDs, you will need to type the account code and customer ID in a search field, which will pull matching results as you begin typing.

    Filter options

Sort By	Sort results by the cardholder's first or last name, card number, card status, employee ID, or unit number.
Show only	Sort results by card status: active, blocked, permanently blocked, fraud, lost, stolen, deleted, assigned, or unassigned.
Account	Displays a drop-down of all your account codes. Select one to filter by account code
Customer ID	Display a drop-down of all your customer IDs. Select one to filter by customer ID. **Note:** You must select an account code before selecting a customer ID.

3. After entering your search criteria, select the search button ($\boxed{Q}$).The card listing will display the first 200 cards you are authorized to access based on your search criteria. If the card you are searching for does not appear in the listing, try more specific filter options.

Editing a Card

ICD > Manage > New Card Maintenance
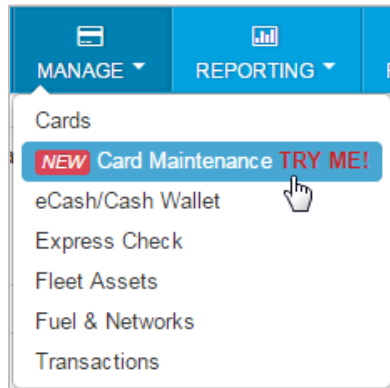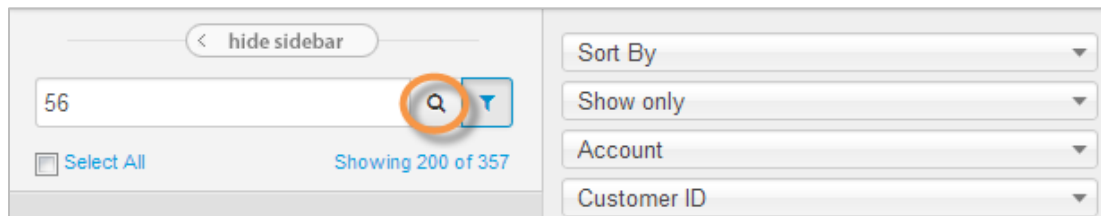
Follow these steps to access Card Detail and edit a card. What you can edit in Card Detail is dependent on your access level. If a section is shown in gray only or you do not see the edit button, you do not have access.

1. Access the Card Maintenance page from the ICD menu bar (**Manage > Card Maintenance**).

2. Enter the search criteria for a card and select the search button.

3. Click anywhere on a card to select it from the list. (Click again to close it.)
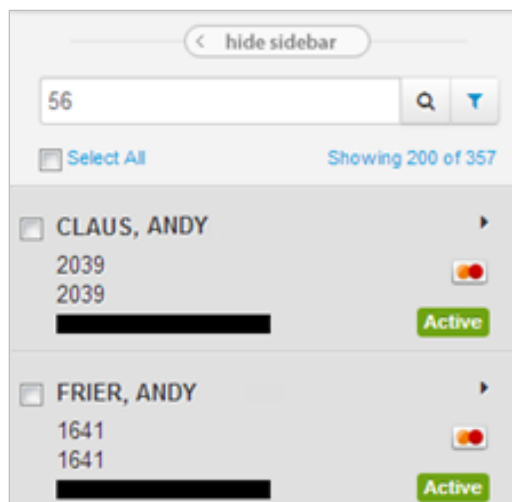
4. Selecting a card from the list opens the card's details on the right side of the page. See the following pages for a description of each section.
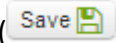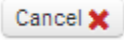

Use these links to quickly scroll to one of the Card Detail sections.

A. Basic Information

The Basic Information section displays key details about the card. The **Move Card** option next to **Status** allows you to move the card to a new customer ID. If you are a proprietary card customer, a **Transfer Card** option displays that allows you to transfer the card information to a new card number. Select **Edit** (Edit ✏) to begin editing specific fields. Select **Save** (Save 💾) or **Cancel** (Cancel ✖) to close editing.

Note: Editing must be closed for a section before you can edit another section.

B. Vehicle and Cardholder Information

This section displays the vehicle, cardholder, and shipping information. The shipping information section displays the address for shipping card orders.

C. Network Restrictions

Network Restrictions allows you to limit the card to specific locations or set the card up for one-time usage. Use the question mark icons () to learn more about each field.
Note: In order to use this functionality, the card must be set up for Limited Network. Contact a Comdata Customer Service Representative for access to this feature.

Select **Edit > Yes** under **Limited Network**. You will be prompted to enter the location code, daily limit, reefer limit, and maximum cash limit for the location. Select **Save** when finished.

After saving your first location, select **Add** to enter additional locations. Enter as many as necessary. Select **Delete** to remove a location or edit the limits on a location and select **Save** to update. You can also select **Yes** under **One Time Off Network Allowed** to open the card for one-time usage at a location outside your network.

D. Product Limits (MasterCard)

If you are a MasterCard customer, this section allows you to set the Overall Limits, MasterCard Limits, or Merchant Category Code (MCC) Group Limits for the card. *To edit product limits, you must have the card profile off company standards.*

- **Overall Limits** control the global dollar and transaction limits as well as where card purchases are permitted (known as MCC groups or individual MCCs).
- **MasterCard Limits** allow you to further restrict the dollars, transactions and MCC groups. These limits cannot exceed the Overall Limits.
- **MCC Group Limits** allow you to further restrict cards to specific types of transactions and dollars (for example, the Fuel Group). MCC Group Limits cannot exceed either the MasterCard or Overall limits.

Select **Change** next to Reset Cycle to set the reset cycle as daily, weekly, or monthly. The system defaults to **Daily**.

E. Product Limits (Proprietary)

If you are a proprietary card customer, the Product Limits section will display your cash, fuel, and product limits. *To edit any of the limits, you must have the card profile off company standards.*

To edit your product limits, select one or more products and then select **Edit**.

In the Edit Product Limits window, you can change the daily limit or one time limit as needed. You can add or remove limits by selecting **Yes** or **No** under **Has Limits?**

F. eCash /Cash Wallet

This section holds information on your eCash or Cash Wallet (for MasterCard customers). If the card is set up for eCash or Cash Wallet, select **Edit Funds** under Express Cash Balance to add or remove money. You can cancel an action by selecting the small (✖) button next to the listing under **eCash Activity**. Note that cancelling a load credits the original load amount and any charges back to your account.

Under Direct Deposit Accounts, select the plus button (➕) to add an account. To edit an existing account, select the edit button in the account row.

Make any changes, then select **Save**. Select **Delete** to permanently remove the account. When first adding a bank account, be sure to set the **Status** field to **Pending PreNote**.

G. Transaction History

For MasterCard and Proprietary customers, this section lists the 10 most recent transactions within the previous 30 days. The Decline tab (MasterCard only) displays only the 10 most recent declined transactions within the previous 30 days using the posted date.

Transaction History.

Transaction Date / Time	Posted Date / Time	Transaction Status	Merchant Name	MCC	Authorized Amount	Posted Amount
12/12/2013 01:32:40 PM		Declined	OIL	5555	$1.00	$0.00
12/12/2013 01:27:28 PM		Authorized	OIL	5555	$101.00	$0.00
12/12/2013 01:24:56 PM		Authorized	OIL	5555	$99.00	$0.00
12/12/2013 01:17:51 PM		Authorized	OIL	5555	$110.00	$0.00
12/12/2013 01:03:13 PM		Authorized	OIL	5555	$110.00	$0.00
12/12/2013 11:47:47 AM	12/12/2013 12:55:18 PM	Posted	OIL	5555	$110.00	$110.00
12/12/2013 11:42:50 AM		Declined	OIL	5555	$1.00	$0.00
12/12/2013 11:41:15 AM		Declined	OIL	5555	$1.00	$0.00
12/12/2013 11:39:27 AM		Declined	OIL	5555	$1.00	$0.00
12/12/2013 11:37:47 AM		Declined	OIL	5555	$1.00	$0.00

Transaction Declines.

TRANSACTION HISTORY

All Declines

Transaction Date / Time	Merchant Name	MCC	Authorized Amount	Posted Amount	Reason
12/12/2013 01:32:40 PM	OIL	5555	$1.00	$0.00	DAILY TRANSACTION COUNT EXCEEDED
12/12/2013 11:42:50 AM	OIL	5555	$1.00	$0.00	ERROR: BAD MAGSTRIPE
12/12/2013 11:41:15 AM	OIL	5555	$1.00	$0.00	ERROR: BAD MAGSTRIPE
12/12/2013 11:39:27 AM	OIL	5555	$1.00	$0.00	ERROR: BAD MAGSTRIPE
12/12/2013 11:37:47 AM	OIL	5555	$1.00	$0.00	ERROR: BAD MAGSTRIPE
12/12/2013 11:37:03 AM	OIL	5555	$1.00	$0.00	ERROR: BAD MAGSTRIPE

H. Recent Card Updates

The last section displays all updates made to the selected card in the past 10 days over a 45 day period. See the table below to understand each column.


| Column	Description
Field	Displays the field that was updated
Action	Displays the type of update: **CHG** (change), **ADD**, (addition), **DELET** (deletion), and **INFO** (information). **Note:** The **INFO** and **DELET** actions are performed by a Comdata associate. These do not pertain to any visible fields.
Old Value and New Value	Displays the value before and after the update. A value displays under **Old Value** only if the action is **CHG** or **DELET.**
Time/Date	The time and date of the update
OPR ID	Operator ID; This field only displays a value if the update was made outside of ICD. The ID number identifies the individual that made the update and the IP address it originates from. If the update was done by a known ICD user, a value will not display.

Updating Multiple Cards

ICD > Manage > New Card Maintenance

This feature allows you to update multiple cards at the same time.

1. Access the New Card Maintenance page from the ICD menu bar (**Manage > New Card Maintenance**).
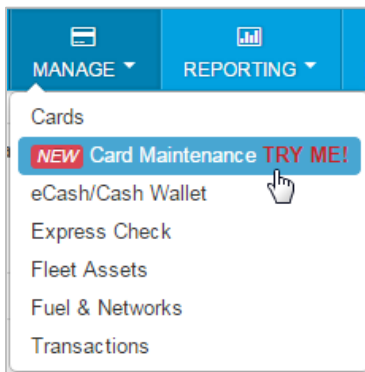

2. Enter a search to return a card listing.
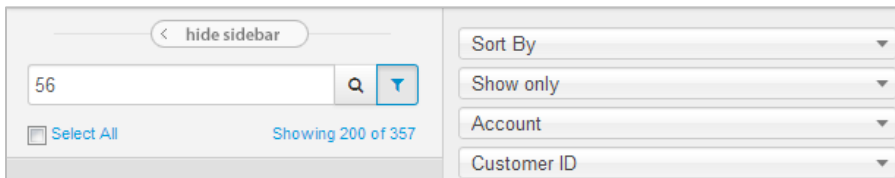
3. Select the checkbox next to each card you want to update. To update all cards in the listing, select the **Select All** checkbox. After selecting cards from your initial search, you can perform additional searches to select cards from different customer IDs.
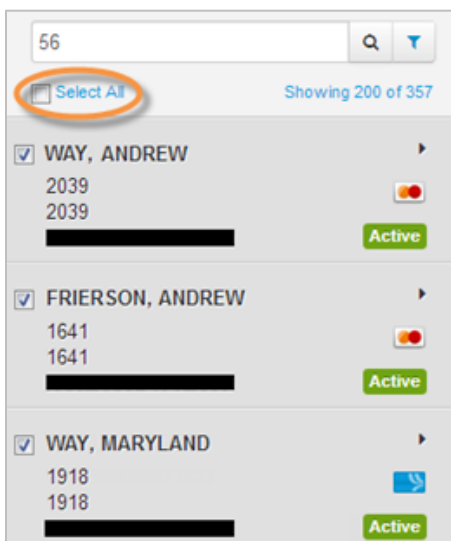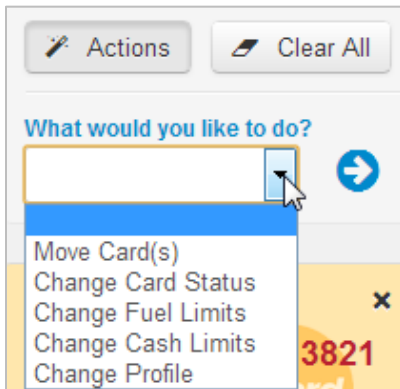
You will see a card image on the right side of the page for each card you selected.
Note: To change the view from images to a list view, use the icons in the far right corner. You can remove a card by selecting the small **x** button on the image. Select **Clear All** to remove all cards.
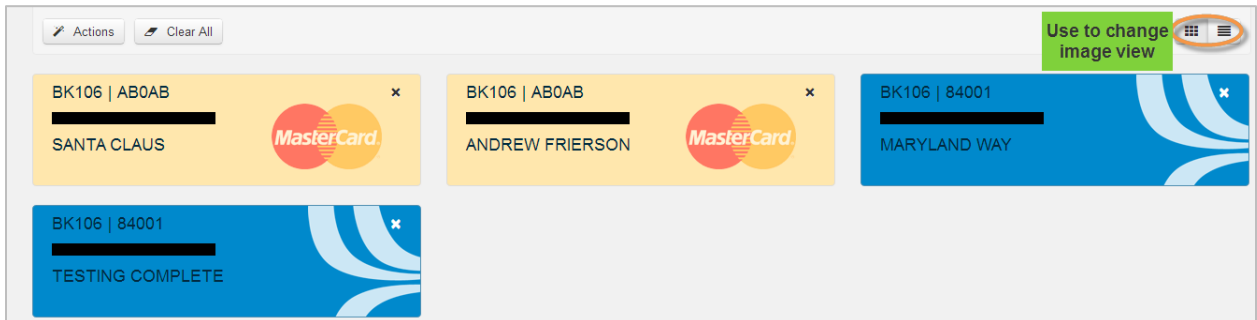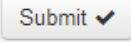

4. Select the **Actions** button to display the five functions you can perform.


- **Move Card(s).** Move the selected cards to a new customer ID.

- **Change Card Status.** Change card statuses to one of the following options: Active, Blocked, Deleted (proprietary cards only), Lost, or Stolen.

- **Change Fuel Limits (proprietary cards only).** Enter a new fuel limit for all selected cards.

- **Change Cash Limits (proprietary cards only).** Change the cash limits for all selected cards.

- **Change Profile.** Change the profile ID for all selected cards.

Note: You cannot perform a proprietary card operation if you have selected both MasterCard and proprietary cards.

5. Select **Submit** [Submit ✔] after making your changes. The system will display a success or error message for each card. Use the drop-down menus labeled **Successful** and **Error** to clear all cards that received success or error messages. Use the red **X** buttons ([✖]) to clear individual cards or use **Clear All** to clear all cards.