New Card Maintenance: Editing a Virtual Card

iConnectData > Manage > Card Maintenance

Editing a virtual card can only be done after card issuance. You can edit all of the card's current attributes or you can add additional details to the card, such as placing MCC (Merchant Category Code) group limits.

Some attributes that cannot be changed include:

- Card Number
- Account ID
- Customer ID
- Name
- Expiration Date

Some common reasons for editing a virtual card include:

- Changing the dollar amount authorized
- Changing the number of transactions authorized
- Blocking a Card
- Resending the card remittance advice to the vendor
- Checking the card security code

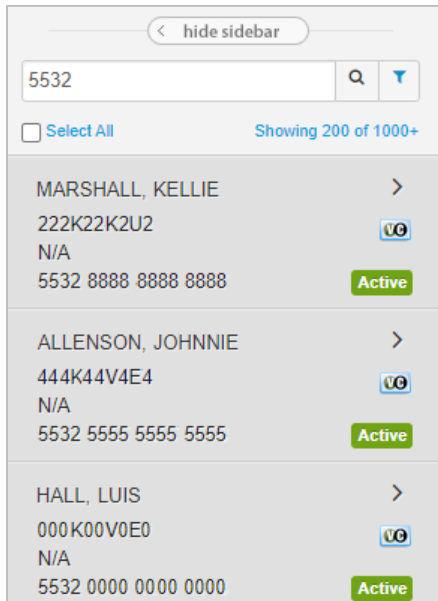1. Access the Card Maintenance page from the ICD menu bar (**Manage > Card Maintenance**).
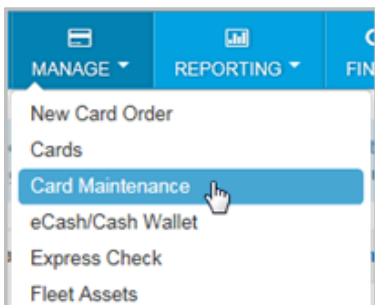
2. Enter the search criteria for a virtual card and then click the search button.

   Note: Searching by the cardholder name can also result in a list of cards associated with their name.
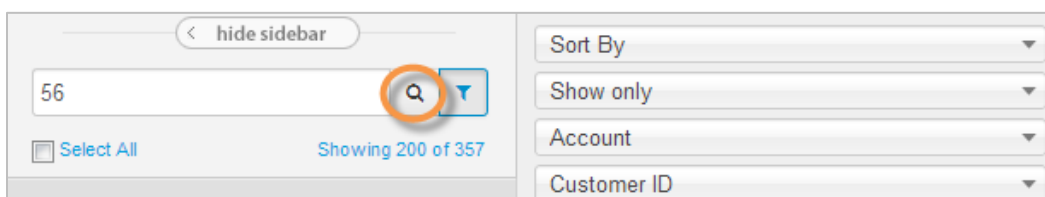
3. Click on a virtual card to select it from the list.

The card's basic information opens on the right of the page. This screen is broken up into three sections:

- Card basic details
- Dollar and transaction limits
- Additional Optional Fields
- Vendor Details

Card Basic Details

The top of Basic Information contains general details on the card, such as the card number, account code, and customer ID.
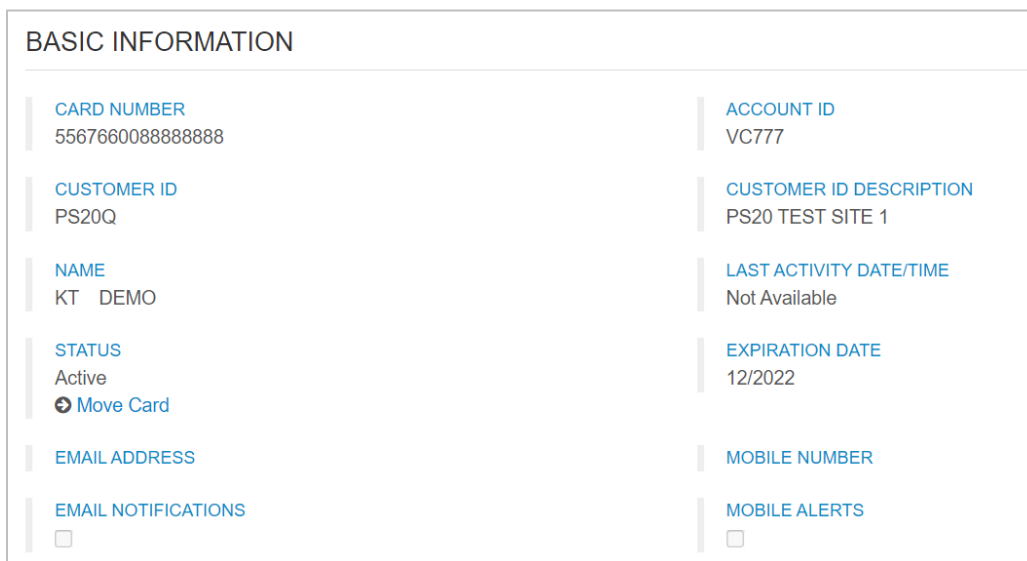
If you have access to edit a virtual card after issuance, an **Edit** button will display in the top-right corner of the page. Click **Edit** to make changes.

Note: If you are an Administrative user, you will have access to edit virtual card details on this page. If you one of your users needs access to edit a virtual card, contact Customer Support.

Once you click **Edit**, the following fields open for editing in the card's basic details:

- **Status:** Options include Active, Blocked, Fraud, Lost, Partial Block, Pending, Stolen, Transfer, Unknown
- **Email Address:** Enter an email address to receive notifications on the usage of the virtual card.
- **Mobile Number:** Enter a phone number that can receive notifications on the usage of the virtual card.
- **Email Notifications:** Select if you would like to receive emails on usage of the virtual card.
- **Mobile Alerts:** Select is you would like to receive text messages on the usage of the virtual card.

Click **Save** to confirm your changes or click **Cancel** to clear out your changes.

*Note: Select **Email Notifications** and **Mobile Alerts** to enroll the virtual card in Alerts and Notifications, a program that allows you to identify misuse and fraud on the virtual card.*

Dollar and Transaction Limits

Scroll down to find the dollar and transaction limits on the virtual card.

TOTAL DOLLAR AMOUNT 450.00	DOLLAR AMOUNT MUST BE EXACT AMOUNT No
DOLLAR AMOUNT AUTHORISED 0.00	DOLLAR AMOUNT USED 0.00
NUMBER OF TRANSACTIONS 5	NUMBER OF TRANSACTIONS USED 0
NUMBER OF TRANSACTIONS AUTHORISED 0	CVC2 841

If you have edit capabilities, the following fields open for editing:

- **Total Dollar Amount:** Total amount for which the virtual card is authorized. You can reduce the authorized value of the card, but it must remain at or above the current **Dollar Amount**.

- **Dollar Amount Must Be Exact Amount:** Select **Yes** if the virtual card will be authorized for a single transaction and you know the exact amount of the transaction. The **Number of Transactions** field must 1 in this case.

    Select **No** if the virtual card will be authorized for more than one transaction or you do not know the exact amount of the transaction (other than that it will not exceed the amount assigned).

- **Number of Transactions:** Total number of transactions allowed on the virtual card.

TOTAL DOLLAR AMOUNT 450.00	DOLLAR AMOUNT MUST BE EXACT AMOUNT No ⌄
DOLLAR AMOUNT AUTHORISED 0.00	DOLLAR AMOUNT USED 0.00
NUMBER OF TRANSACTIONS 5	NUMBER OF TRANSACTIONS USED 0
NUMBER OF TRANSACTIONS AUTHORISED 0	CVC2 841

Additional Optional Fields

Scroll down from the dollar and transaction limits to find additional user defined fields.

If you have edit capabilities, the following fields open for editing:

- **Field 1-5:** Use these fields to add information that is relevant to your business and the virtual card order. For example, an auto insurance software company may use **Field 1** for the **Claim #**, **Field 2** for the **VIN**, and **Field 3** for the **Claim Date**. Each field is optional and accepts up to 255 alphanumeric or special characters.

  These fields will display in the posted transaction data and can help you reconcile with your own data stored in these fields.

- **Effective From and Effect To**: Use these fields to set an active date range for the virtual card (for example, 4/15/2022 – 5/15/2022). The virtual card will be blocked and declined if a transaction is attempted before the **Effective From** date or after the **Effective To** date.

The last section contains fields related to the vendor and the invoice.

VENDOR INVOICE NUMBER VIRT CARD 16	**VENDOR NUMBER** PS20Q
PO NUMBER	**MISC. COSTS** 0.00
DUE DATE 2021-02-05	**PAYMENT DATE** 2021-02-06
[View Invoice]	
REMITTANCE EMAIL j.doe@vendor.com [Resend Remittance]	**FAX NUMBER** 8888888888 [Resend Fax]

ADJUST CARD CONTROLS

[○ NO]

Card is open for all configured Merchant Category Code(MCC) Groups

Edit capabilities allows you to change the following fields:

- **Vendor Invoice Number:** A numeric code assigned to the vendor's invoice.

- **Vendor Number:** The number assigned to the vendor in the accounting system for the selected customer ID.

- **PO Number:** The purchase order number for the virtual card transaction.

- **Misc. Costs:** The amount quoted by the product or service provider for any miscellaneous costs.

- **Due Date:** Date payment is due to the vendor.

- **Payment Date:** Date the payment is due.

- **Remittance Email:** The vendor email address that receives the virtual card payment details.

- **Fax Number:** The vendor fax number that receives the virtual card payment details.

   *Note: Click **Resend Remittance** to resend an email or **Resend Fax** to resend a fax remittance. The merchant that received the virtual card will receive the resent remittance advice.*

   (see image on next page)

- **Adjust Card Controls:** Open the virtual card for any Mastercard location or lock it down to specific Mastercard Merchant Category Groups (MCCs), which denotes a type of business or service. Use the **Adjust Card Controls** slider to make your selection.

Note: Please note the following:

- *Click **View Invoice** to see the details related to the invoice (date, invoice number, gross amount, discount amount, net amount, and any comments).*

- *If you'd like the virtual card to be processed regardless of the MCC group, leave the **Adjust Card Controls** slider as **No**.*

- *If you'd like the limit the virtual card to specific MCC groups, such as Travel & Entertainment, Business Services Group, or Miscellaneous Lodging, click the **Adjust Controls Slider** to **Yes**.*

(continued on next page)

- *This action displays all MCC groups available to the virtual card. Select each MCC group you'd like to add or remove from the virtual card's access. For example, in the image below,* ***Legal, Insurance Group****,* ***Financial Group,*** *and* ***Fuel Group*** *have been removed.*