iConnectData (ICD)
User Guide

Updated: 03/02/2020

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Revision History

Version	Date	Editor	Modification
v01	20200302	Steven Harris	Initial document created.

Overview

iConnectData (ICD) is a secure, self-service web portal for performing account management, such as accessing reports, pulling invoices, accessing product documentation, and much more. The features in ICD are designed to provide self-service account management, which can reduce the need to contact Comdata Customer Service for assistance.

The latest version of ICD offers enhanced features, such as QuickLinks for your most used features, a streamlined navigation, making it easier to locate and perform necessary account functions, and the Resource Center, your place for the latest product information.

This document covers the basics of using ICD.

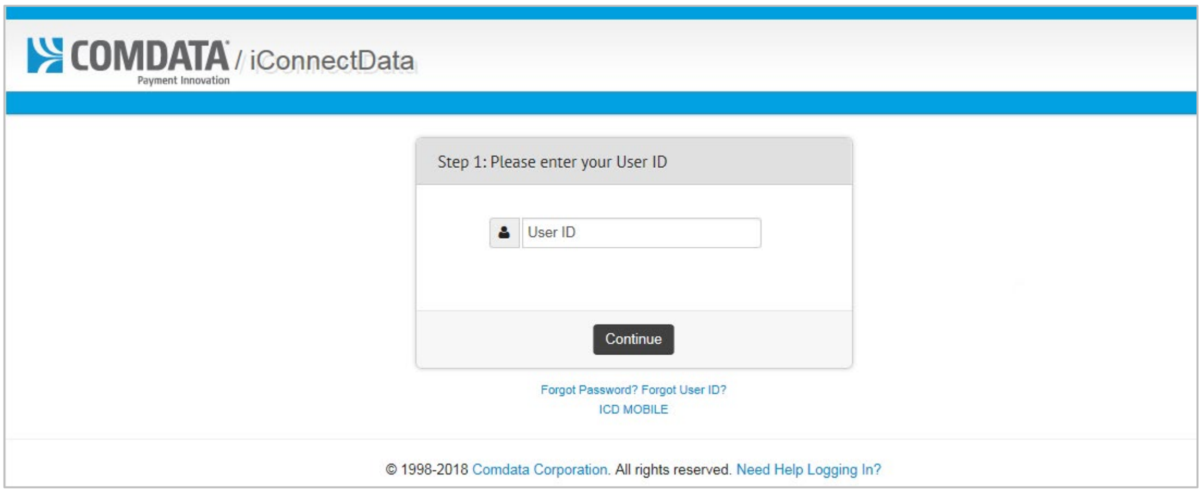
Logging into iConnectData

The iConnectData (ICD) website provides a safe and secure method of logging in. The login process includes selecting an ImageKey and ImageKey caption, which confirms you are at the secure ICD site and allows for verification of your identity.

1. Once you receive the ICD Welcome email, click the ICD link included in the email: https://w6.iconnectdata.com/Login/init. Use this link anytime to access ICD.

2. On the ICD login page, enter your assigned user ID. Then, click **Continue**.

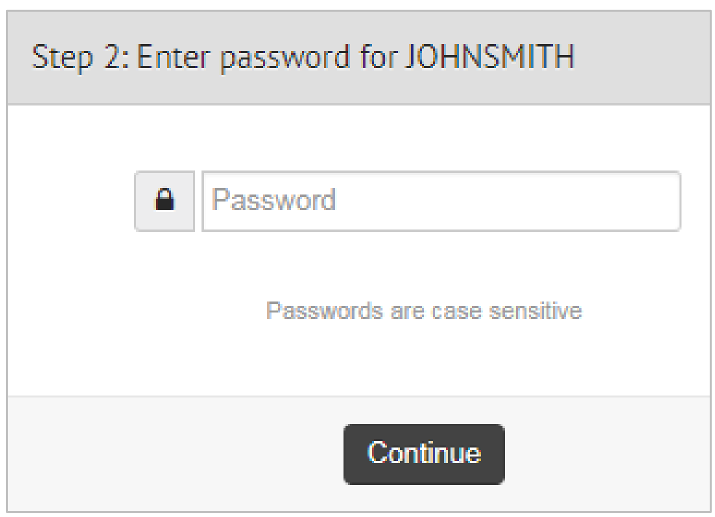
   Note: You should have received your user ID in the ICD Welcome email.



3. Enter your password. Then, click **Continue**.

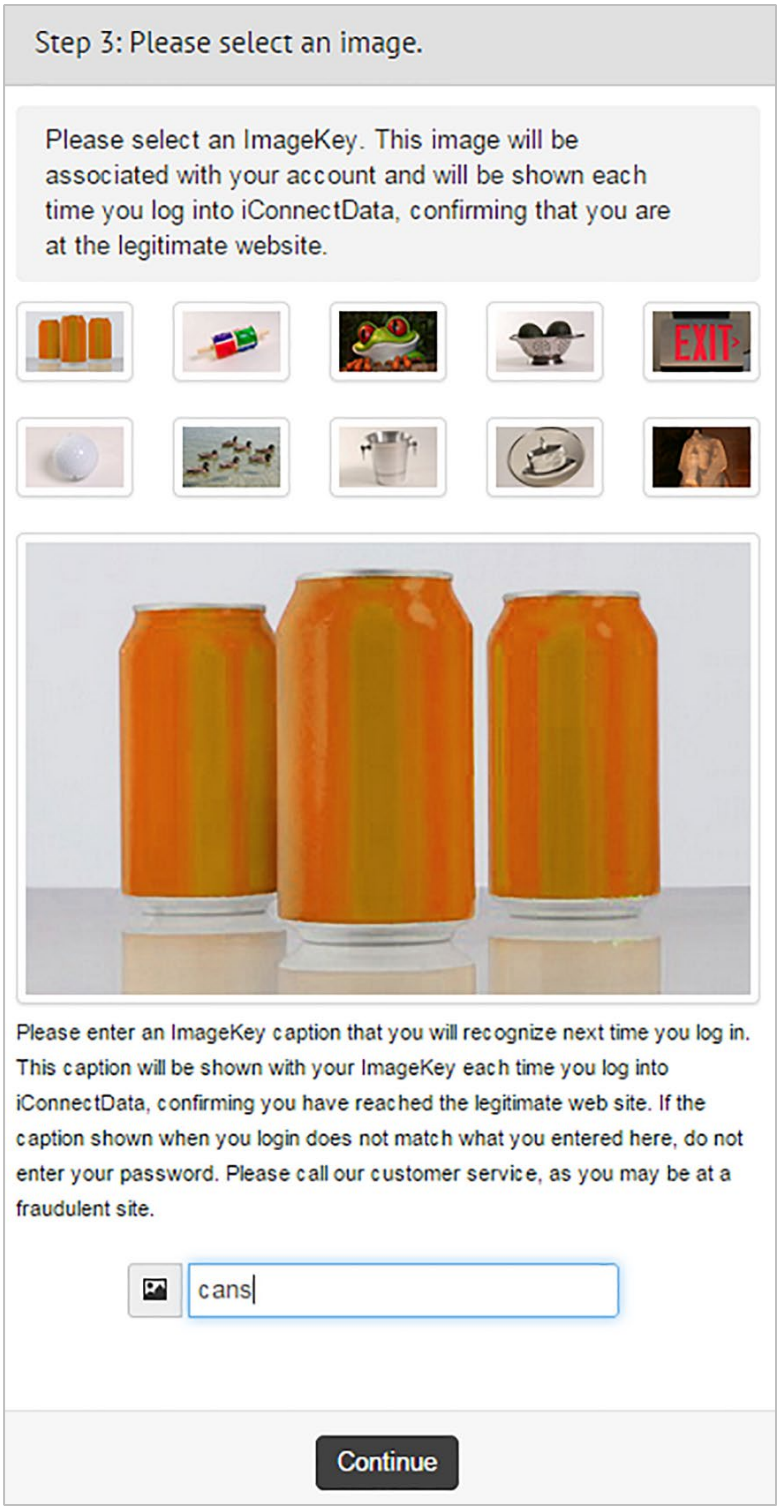
   Note: You should have received a temporary password in the ICD Welcome email. If this is your first time logging in, you are required to change your password, which is case sensitive, to meet the following requirements:

   - Must be at least 8 characters.
   - Must include 1 number.
   - Must include 1 uppercase and 1 lowercase letter.



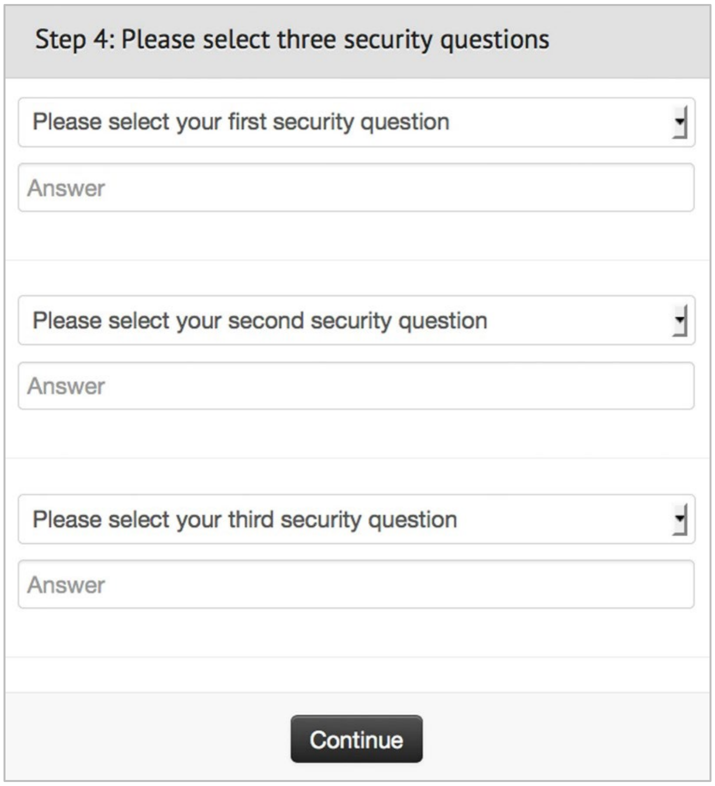
4. Select an ImageKey and enter an ImageKey caption. Select an ImageKey you can easily recognize and enter a caption you will remember. Click **Continue** when finished.

   Note: At any time when you log in, if the displayed ImageKey and/or ImageKey Caption are not the ones you selected here, ***do not*** enter your password. Call Comdata Customer Service immediately!



5. Select three security questions and enter their answers. Ensure your questions and answers are easy to remember. Click **Continue** when finished.

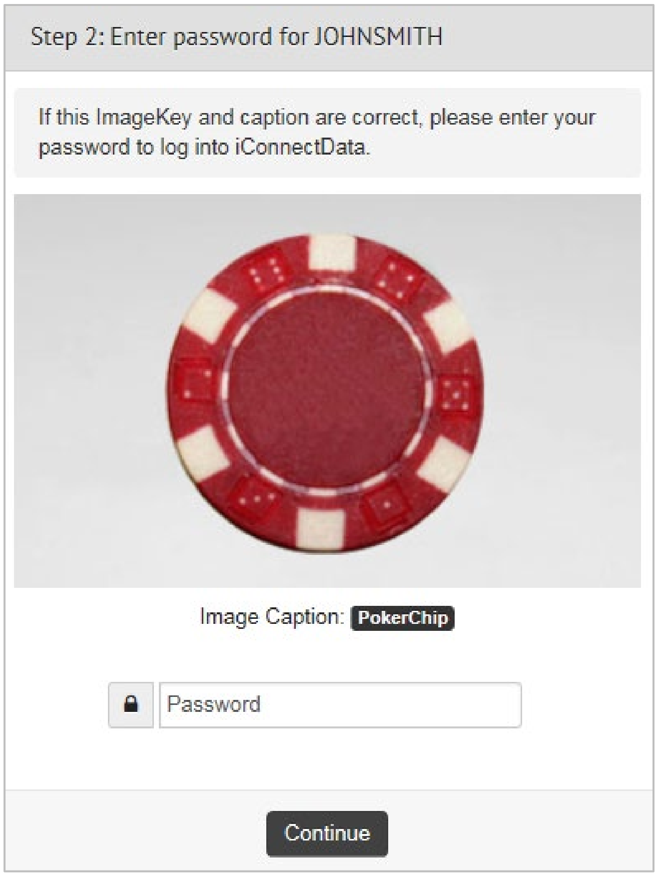
   Note: Make sure you have a secure way to remember your password, ImageKey, ImageKey Caption, and security questions and answers. Do not share this information with anyone.



6. You will be directed to the ICD home page. The next time you log in:

   - Enter your user ID.
   - Check your ImageKey and ImageKey Caption.
   - If your ImageKey and ImageKey Caption are correct, enter your password.

   Note: If your device isn't recognized (i.e., you are logging in from a different computer or location), or if you need to change your password, you will be asked one of your security questions to verify your identity. If you cannot answer your question correctly, call Comdata Customer Service for assistance.



Retrieving your Login Information

If you forget your ICD user ID or password, you can easily retrieve them by selecting one of the following options on the ICD Login page: **Forgot User ID?** or **Forgot Password?**.

Retrieving your Password

If you forget your password, follow these steps:

1. Click **Forgot Password** on the ICD Login page.
2. In the Password Reset dialogue box, enter your user ID and click **Continue**.
3. A message displays confirming that an email has been sent to the email address associated with your user ID. Check your email for a message titled Password Request.
4. In the Password Request email, select the link to return to the Password Reset dialog box.

   Note: This link expires in 72 hours.
5. Enter your user ID.
6. Answer one of the security questions you set up the first time you logged in.
7. Enter your new password in the fields provided for confirmation. Then, click **Continue**.

   Note: You cannot enter a previously used password.
8. The system displays a green success message and redirects you to the ICD Login page.

Retrieving your User ID

If you forget your user ID, follow these steps:

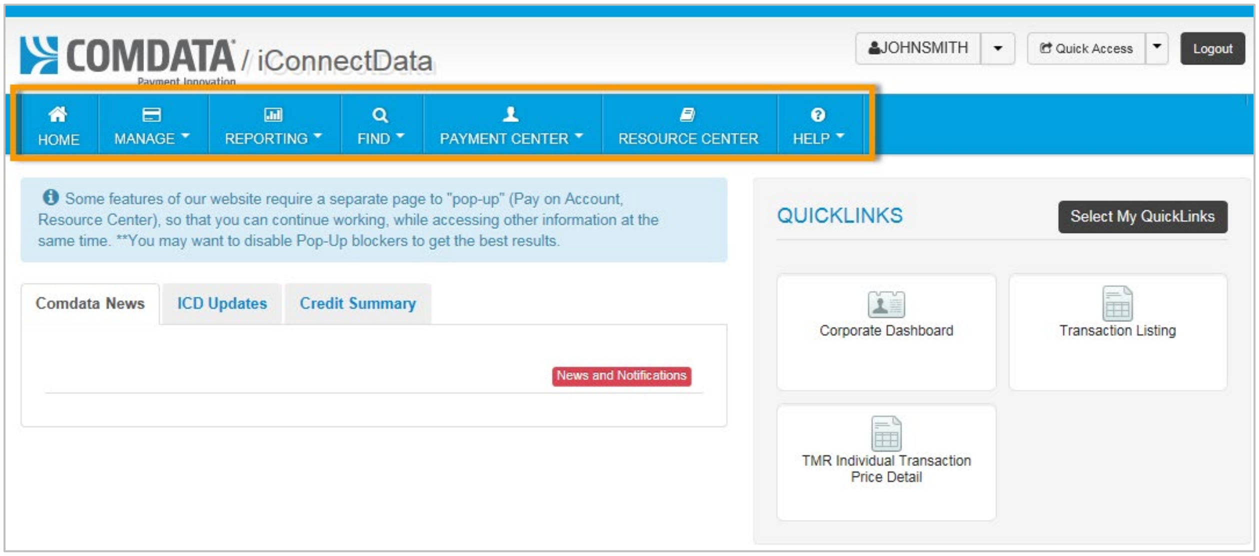
1. Click **Forgot User ID** on the ICD Login page.
2. Enter the email address used to sign up for ICD, and your first and last name in the fields provided. Then, click **Continue**.
3. You should immediately receive an email message with your user ID.

Navigating the iConnectData Home Page

The iConnectData (ICD) home page is designed to offer a simple and intuitive navigation of the web portal. For example, the main navigation bar contains access to all of your account management features and you can use the QuickLinks tool to set up links to your favorite features.

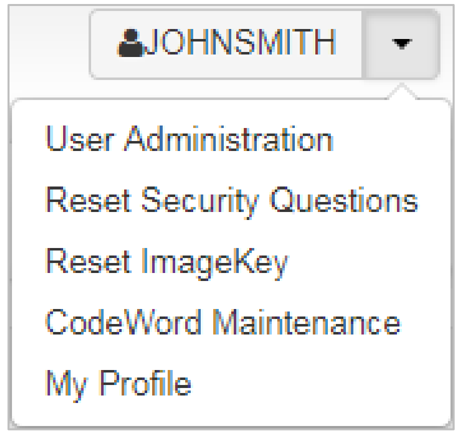
Navigate the Main Menu

The main navigation bar contains up to seven options. Note that the options available under each drop-down are based on your access permissions. If you do not see a task that you should be able to perform, contact Comdata Customer Service.



Drop-Down	Description
Home	Returns you to the ICD home page from anywhere in the web portal.
Manage	Contains all of your program task options, such as card maintenance, card ordering, and real-time transaction activity.
Reporting	Links you to your reporting options, such as reportQ, which contains preformatted canned reports on your account activity, and Business Intelligence, which contains any custom reports within your account.
Find	Links you to location tools such an ATM Locator and a Merchant Locator.
Payment Center	Contains your online payment methods for paying invoices and your available credit with Comdata.
Resource Center	Your source for up-to-date product documentation and educational resources.
Help	Links you to Classic ICD and a Feedback option. Use Feedback to report any technical problems you experience with ICD.

Manage your User Profile

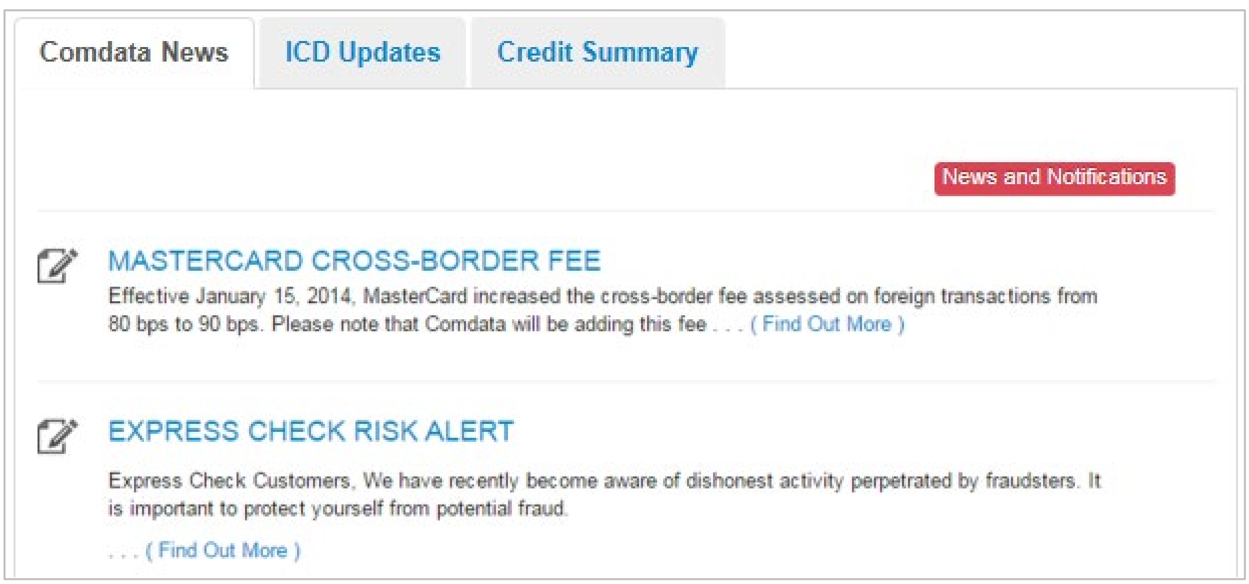


The user ID drop-down in the top right corner of the ICD home page contains specific options for managing your ICD account, such as:

- Copying and deleting users, if you have Administrator access.
- Resetting your ImageKey, ImageKey Captions, and security questions and answers.
- Editing or deleting authorized codewords through Codeword maintenance.
- Updating your contact information (email and mailing address).
- Setting up email notifications on credits and invoices.

Stay Up to Date on News and Credit

The left side of the home page contains Comdata News, ICD Updates, and the Credit Summary tab.

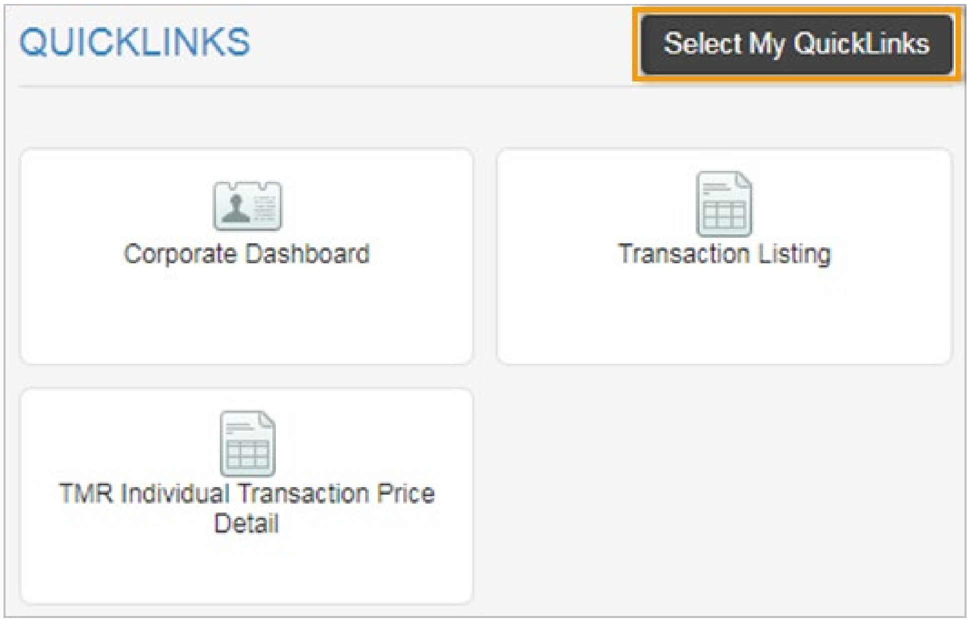


Tab	Description
Comdata News	Announcements on product enhancements, new products, and other critical up-to-date information.
ICD Updates	Announcements specific to ICD, such as outages, enhancements, and new features.
Credit Summary	A snapshot of your current credit activity.

Set Up QuickLinks

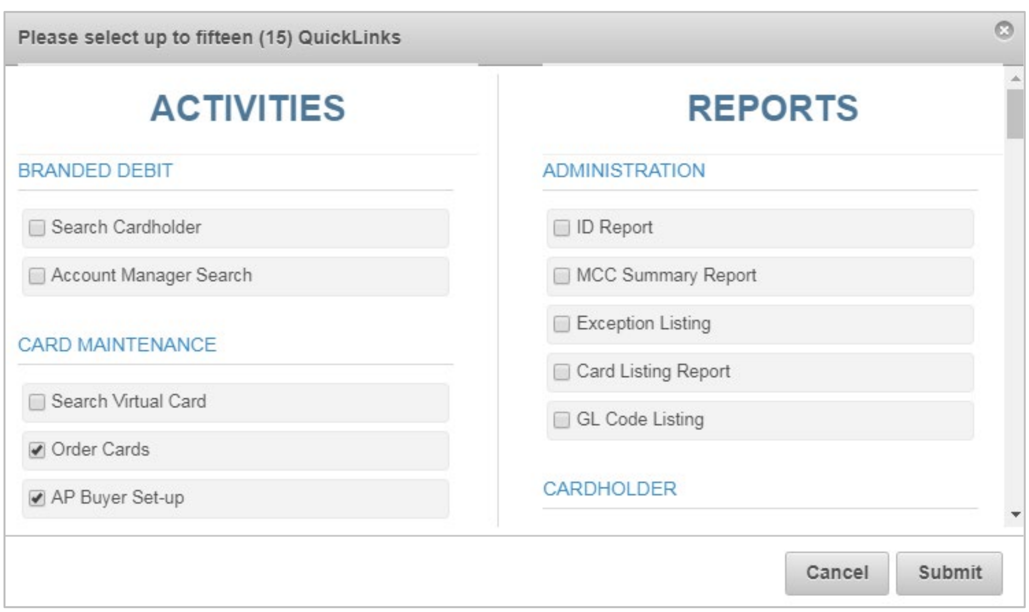
QuickLinks allows you to create a one-click option for your most frequently used tasks. The process is similar to bookmarking your favorite web pages. Locate the QuickLinks tool on the ICD home page and follow these steps:

1. Click the **Select My QuickLinks** button to open the Selection window.

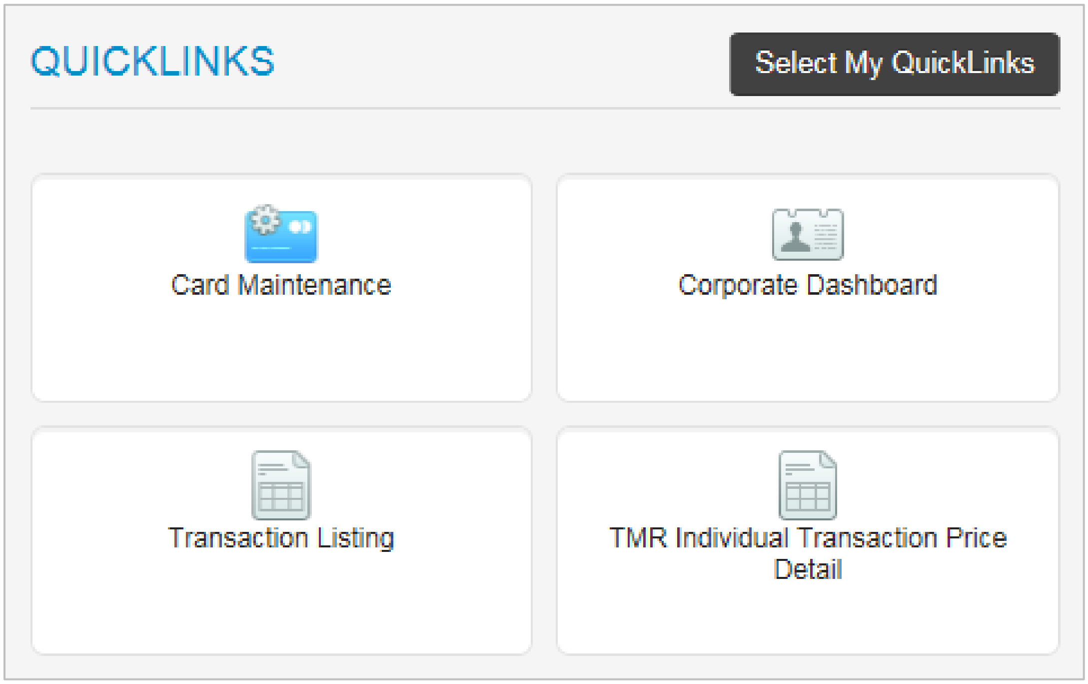


2. Select the check box next to each page you often use and then click **Submit**. You can select or deselect QuickLinks at any time.

   Note: You can create a QuickLink for every application within ICD, but you can create up to only 15 at a time. Some QuickLinks may be preloaded based on your account set up.



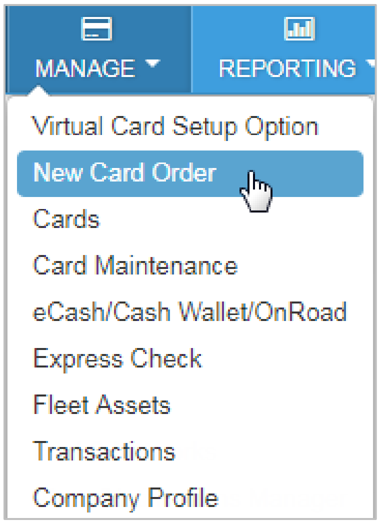
3. Once you've made selection(s), the link(s) will display on the QuickLinks tool. Click a link to open the related page.



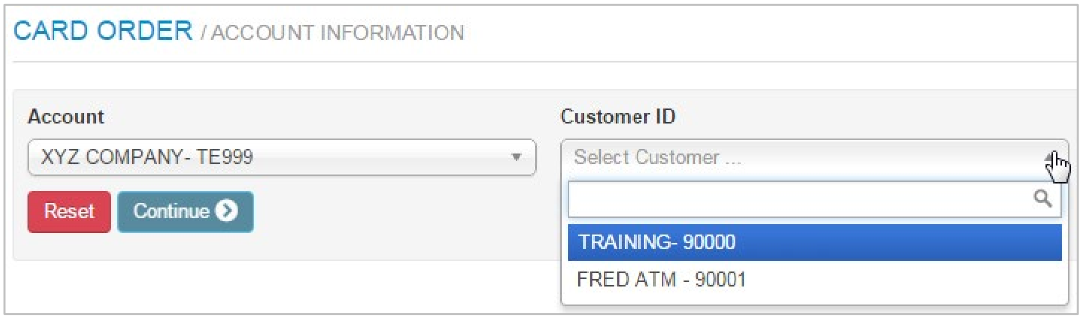
Order a New Proprietary Card

As a Proprietary card customer, you can use ICD to order proprietary cards. Follow these step to order a single Proprietary card.

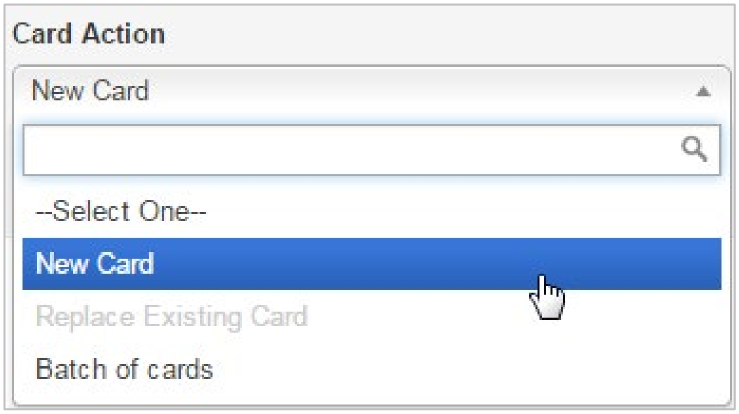
1. To access the Card Order page, select **Manage > New Card Order**.



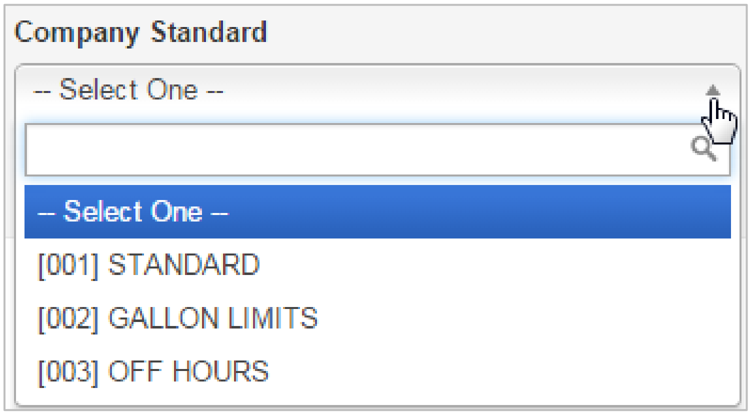
2. Select the account code and customer ID for ordering Proprietary cards. If you select an account code and customer ID not set up for ordering Proprietary cards, you will receive an error.



3. The page refreshes to display the **Card Action** drop-down. Select **New Card**.

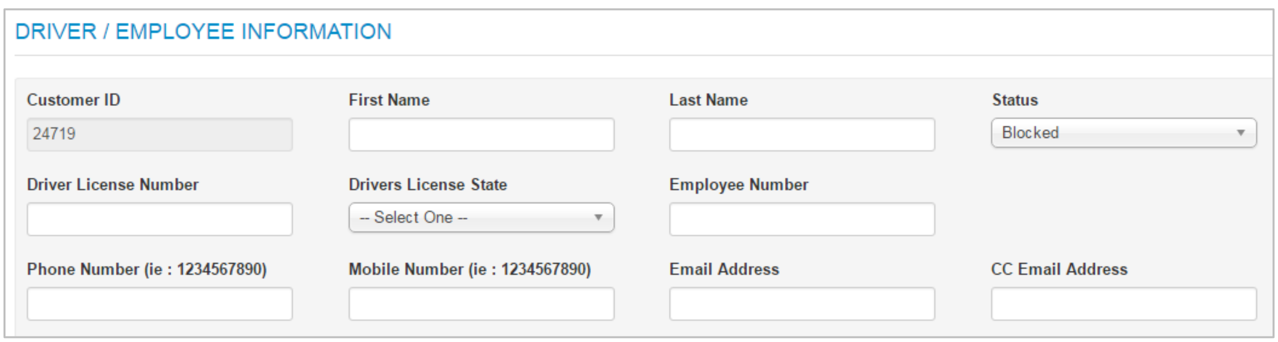


4. The page refreshes to display the **Company Standard** drop-down. Select the standard for the new card. Then, click **Continue** (Continue).

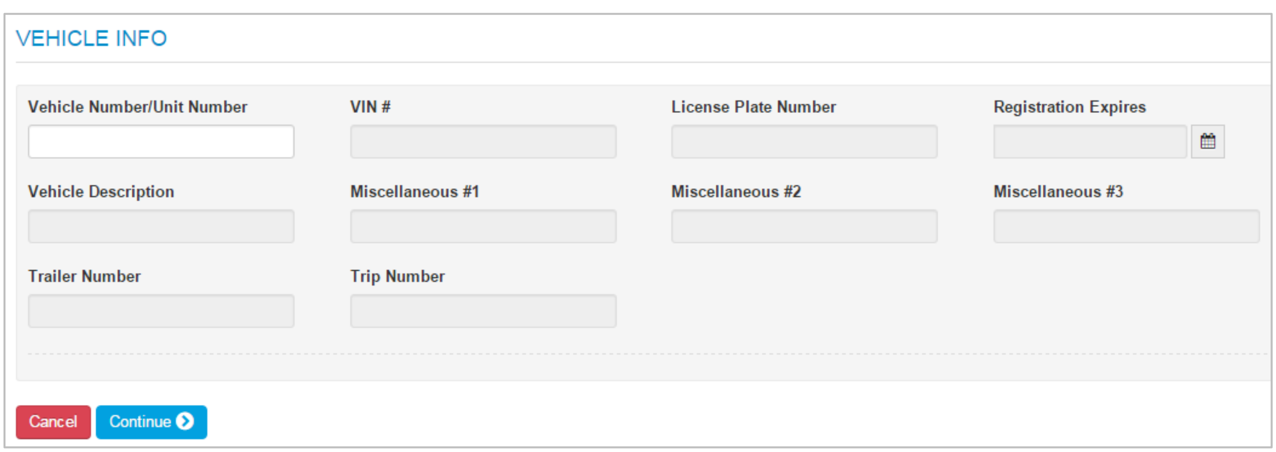


5. The page refreshes to display additional fields for entering details on your card order. The Driver/Employee Information section contains cardholder-related fields. Complete each field as necessary.

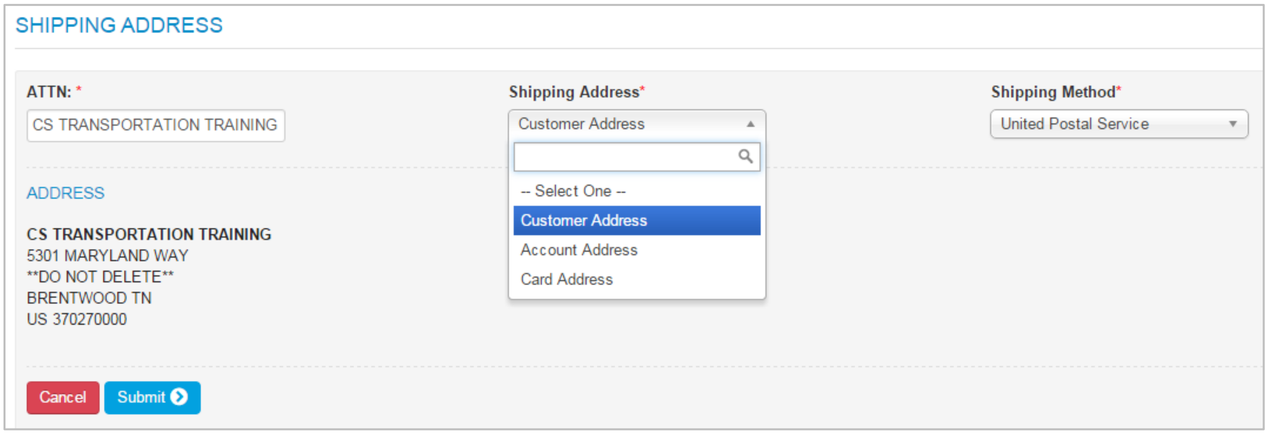
   Note: If the Driver License state is California, the **Status** field must be set to **Blocked**.



   The Vehicle Info section contains fields related to the driver's vehicle. These fields will be open for editing only if the cardholder is a driver and/or your company requires them to be completed. Click **Continue** when ready.

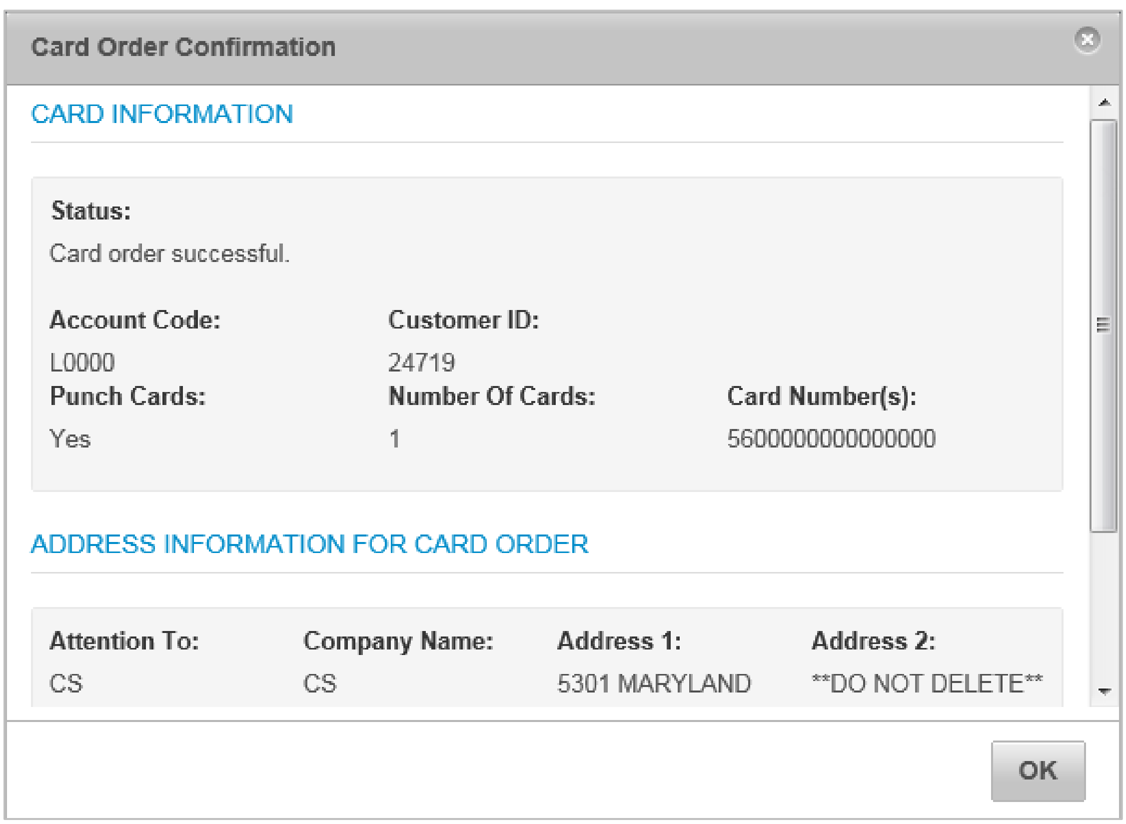


6. Complete the **Shipping Address** fields and then click **Submit**.



- **ATTN.** The person, department, entity, etc. responsible for receiving the cards.
- **Shipping Address.** Select either Customer Address, Account Address, Corporate Address, or Card Address. Select **Card Address** to manually enter a receiving address. Note that cards ordered for a California address must be in Blocked status.
- **Shipping Method.** United Postal Service (UPS) is the only shipping method available.

A Card Order Confirmation window opens confirming submission of your order. Review the details in the window to ensure your order was processed accurately. Click **OK** to exit.



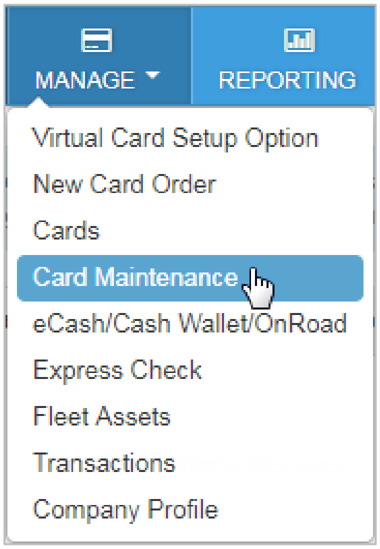
Use Card Maintenance

Card maintenance provides many options for searching for cards, editing cards, and updating cards.

Searching for Cards

To search for one or more cards, use the Smart Search tool under Card Maintenance.

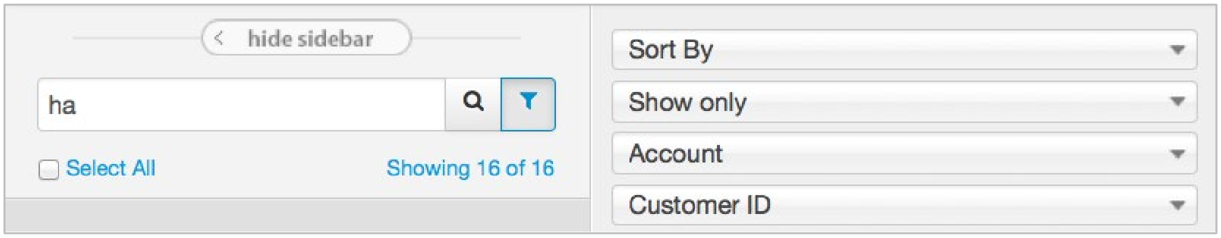
1. Access the Card Maintenance page from the iConnectData (ICD) menu bar (**Manage > Card Maintenance**).



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 click the filter button () to display your filter options. Click it again to close the filters.



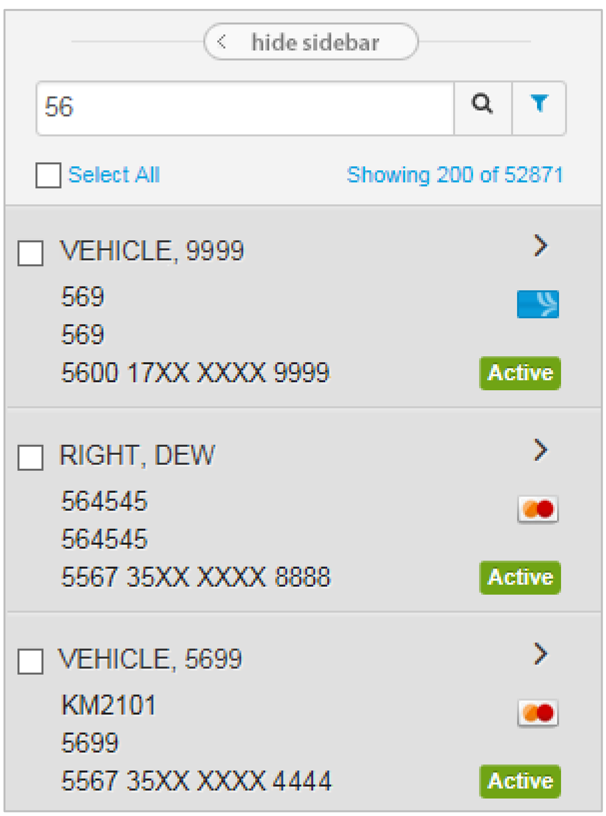
(continued on next page)

Filter options

Option	Comments
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.
Customer ID	Displays 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.

Note: If you have 300 or more customer IDs, a drop-down will not display for the Account Code and Customer ID options. You will need to type these values in, but the search field will pull matching results as you begin typing.

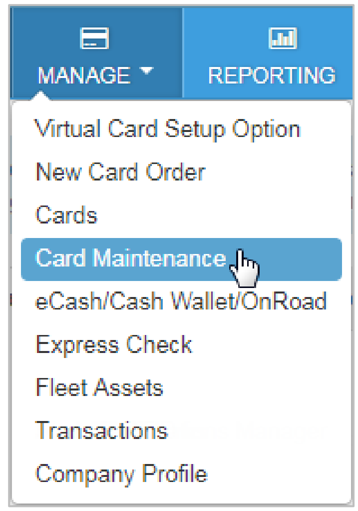
3. After entering your search criteria, click the search button ( ).The card listing will display the first 200 cards you are authorized to access based on your search criteria. If the card you are searching for does not appear in the listing, try more specific filter options.



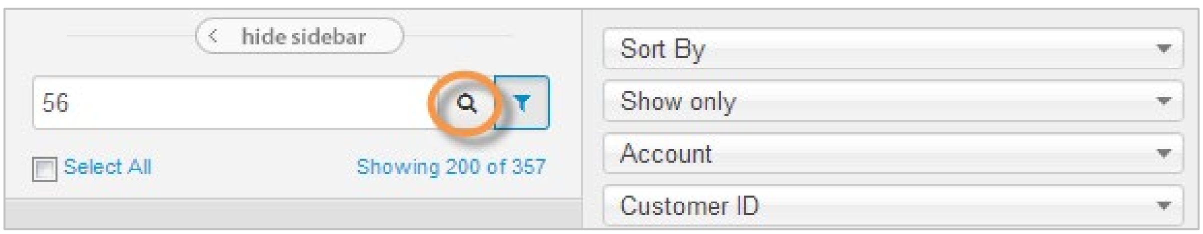
Editing a Card

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 you want to edit but cannot, contact a Comdata Customer Service Representative.

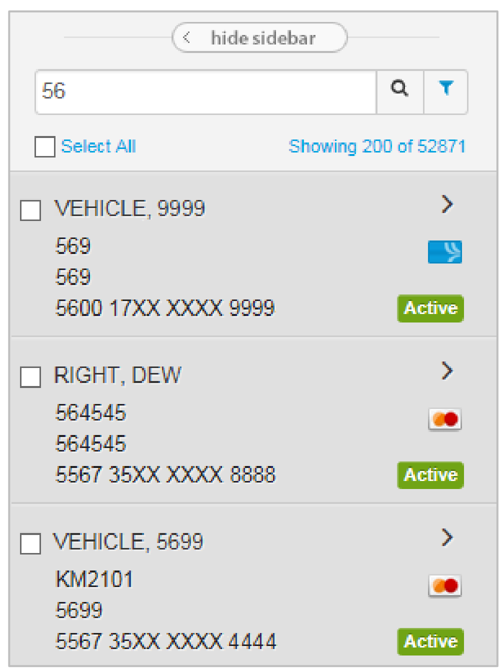
1. Access the Card Maintenance page from the iConnectData (ICD) menu bar (**Manage > Card Maintenance**).



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



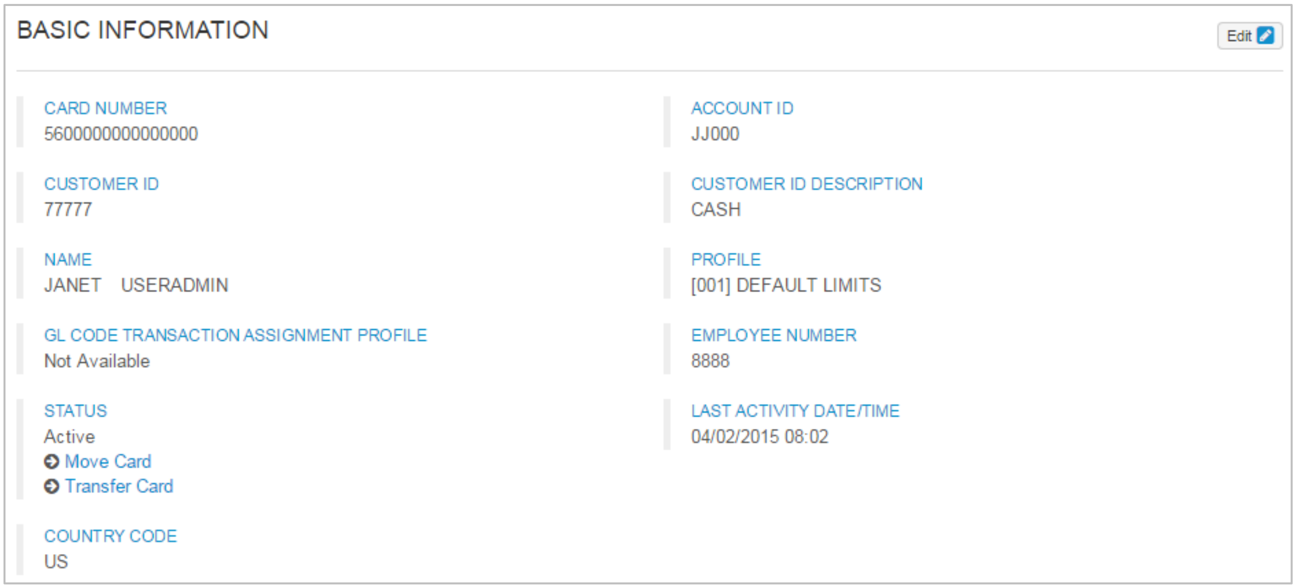
3. Click anywhere on a card to select it from the list. Click again to close it.



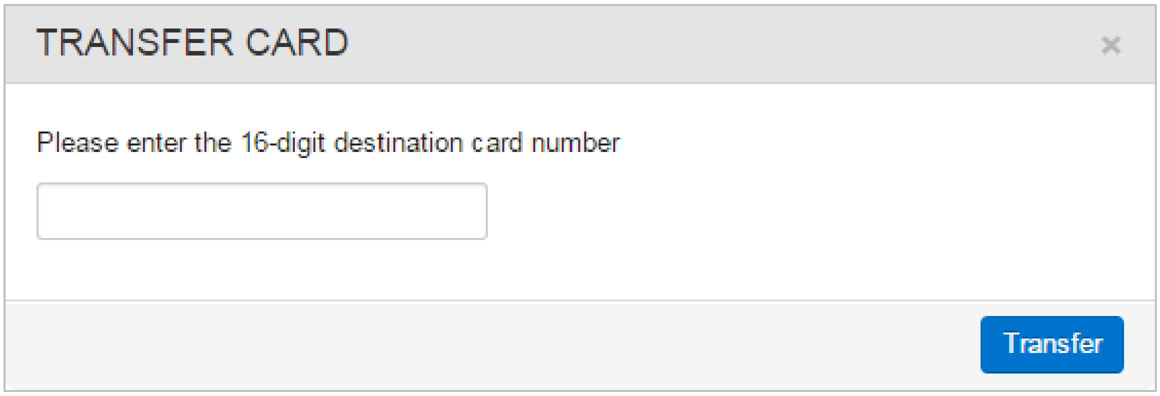
4. Selecting a card from the list opens Card Detail on the right side of the page. See the following sections for a description of each section:

Basic Information

The first section displays key details about the card. Click **Edit** (Edit) to begin editing specific fields. Click **Save** (Save) or **Cancel** (Cancel) to close editing. Editing must be closed for a section before you can edit another section.

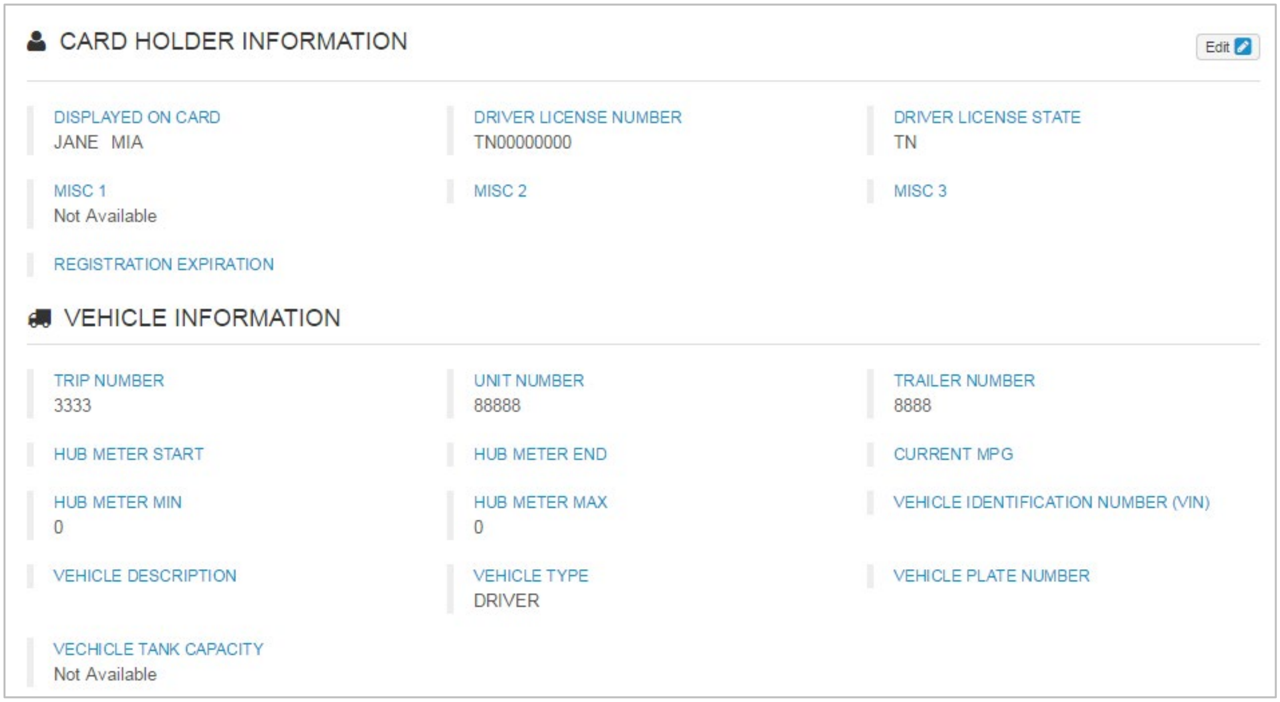


If you're editing a Proprietary card, a **Transfer Card** option also displays that allows you to transfer the card information to a new card number. Note that the original and new card must be within the same customer ID.

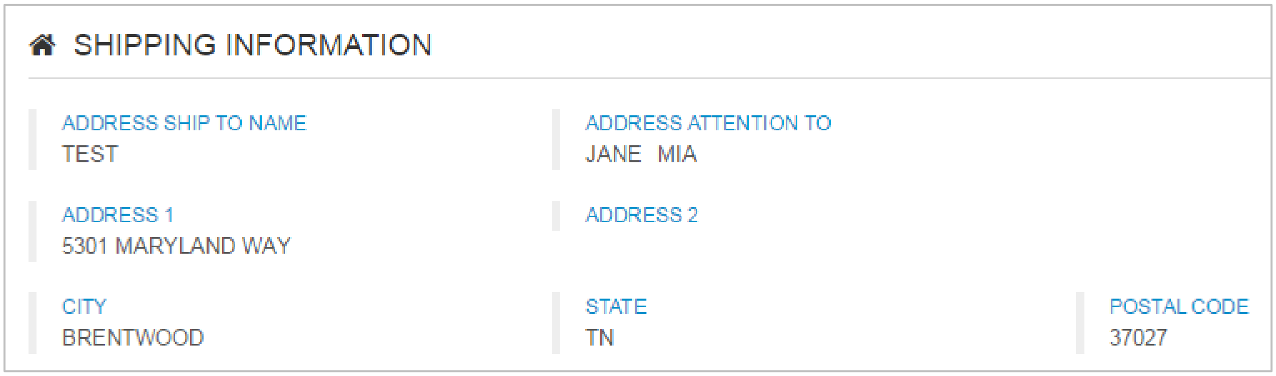


Vehicle and Cardholder Information

The next section displays the vehicle, cardholder, and shipping information. The shipping information section displays the address for shipping cards directly to the cardholder. If no address is displayed, then cards will be shipped to the address associated to the card's customer ID.



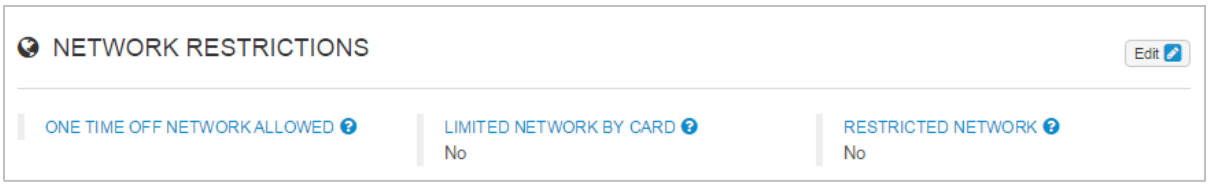
Below the Cardholder and Vehicle Information is the Shipping Information. This section displays the address for shipping cards directly to the cardholder. If no address is displayed, then cards will be shipped to the address associated to the card's customer ID.



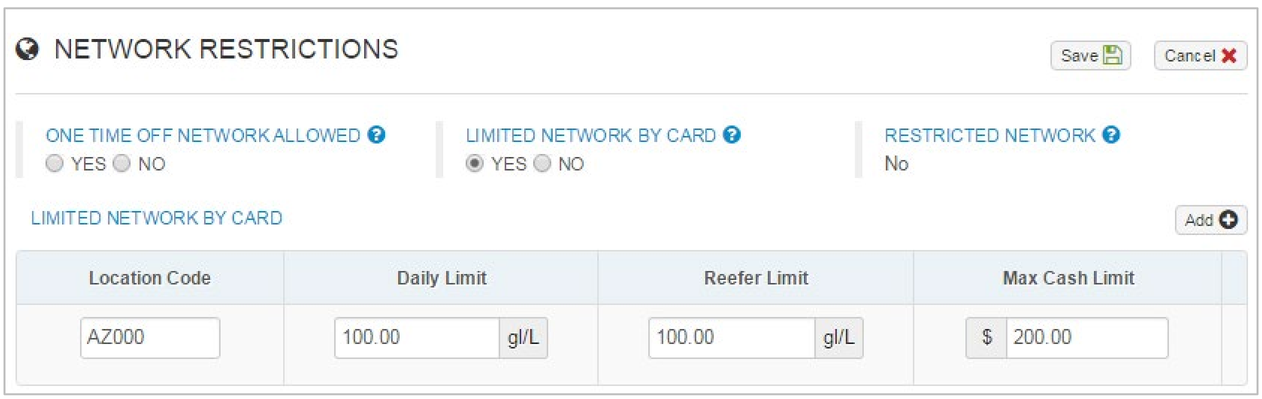
Network Restrictions

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.

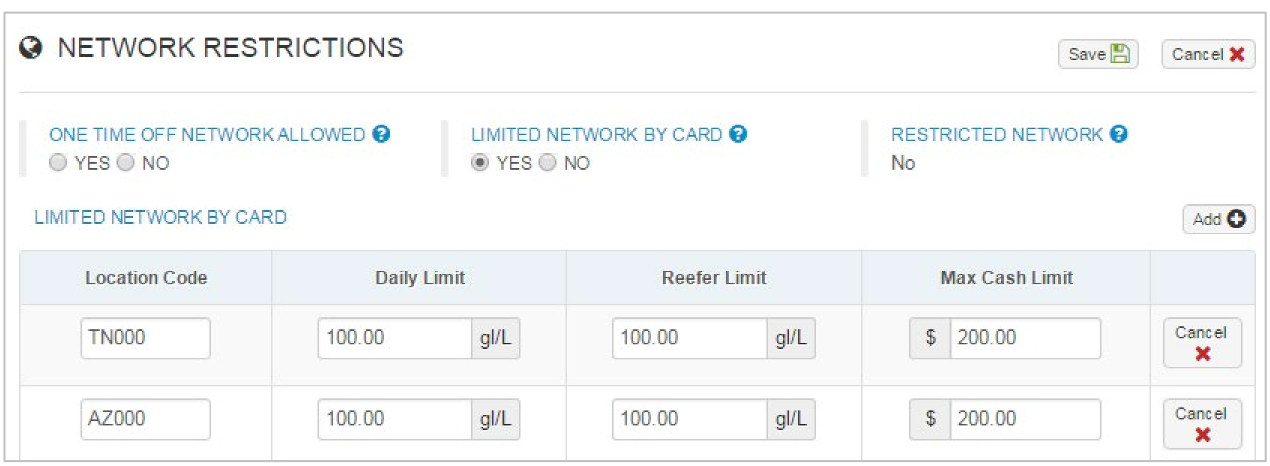
Note: In order to use this functionality, the card must be set up for Limited Network. Contact a Comdata Customer Service Representative for access to this feature.



Click **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. Click **Save** when finished.



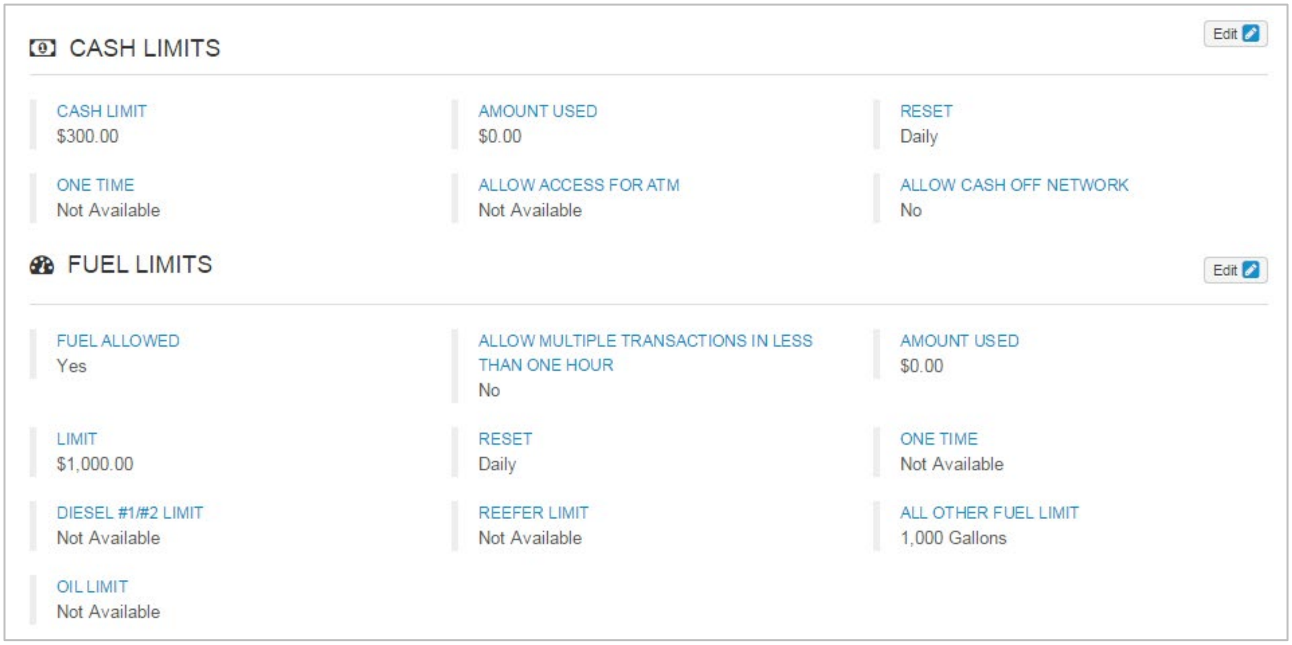
After saving your first location, click **Add** to enter additional locations. Enter as many as necessary. Click **Delete** to remove a location or edit the limits on a location and click **Save** to update.



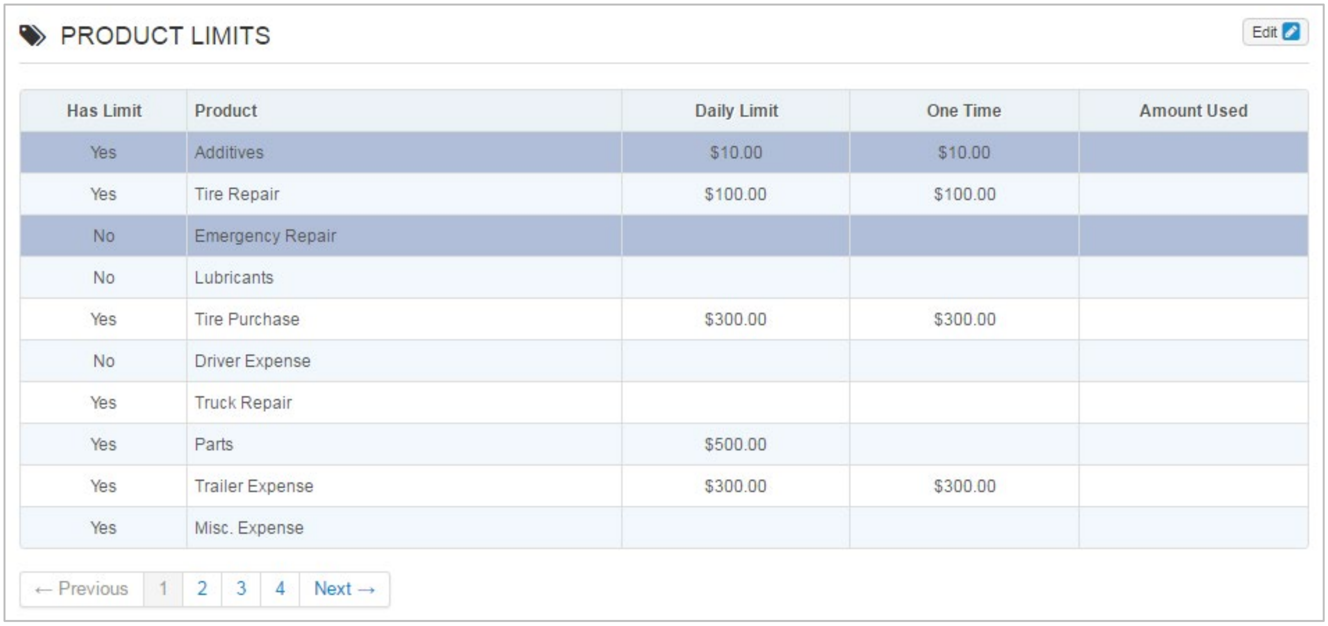
You can also select **Yes** under **One Time Off Network Allowed** to open the card for one-time usage at a location outside your network.

Product Limits

A Cash Limits and Fuel Limits section displays before the Product Limits. The Cash Limits section displays limits on the cash amount of the card and where it can be used, such as ATM access, reset value, etc. The Fuel Limits section displays limits on fuel related purchases such as the Diesel #1/#2 Limit, Oil Limit, Reefer Limit, etc.



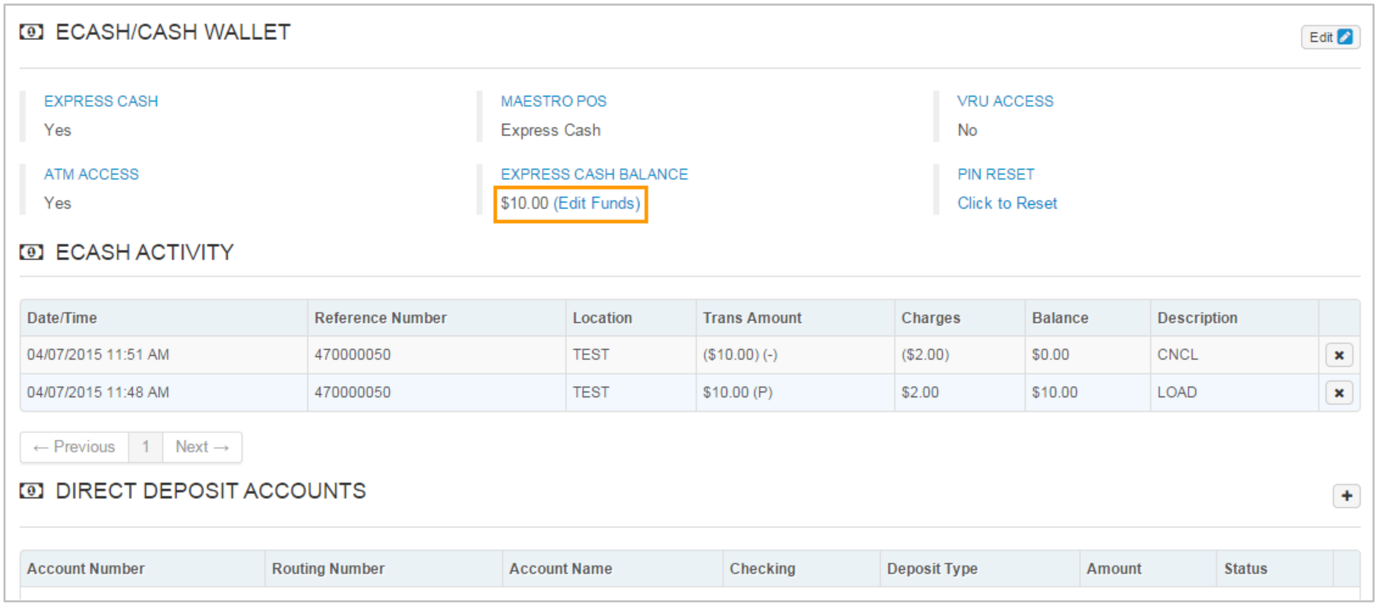
Under the Product Limits section, select one or more products and then click **Edit**. This will open the Edit Product Limits window, where you can change the daily or one-time limit and add or remove limits for each product selected. *To make edits, the card profile must be off company standards.*



Has Limit	Product	Daily Limit	One Time	Amount Used
Yes	Additives	$10.00	$10.00	
Yes	Tire Repair	$100.00	$100.00	
No	Emergency Repair			
No	Lubricants			
Yes	Tire Purchase	$300.00	$300.00	
No	Driver Expense			
Yes	Truck Repair			
Yes	Parts	$500.00		
Yes	Trailer Expense	$300.00	$300.00	
Yes	Misc. Expense			

eCash /Cash Wallet

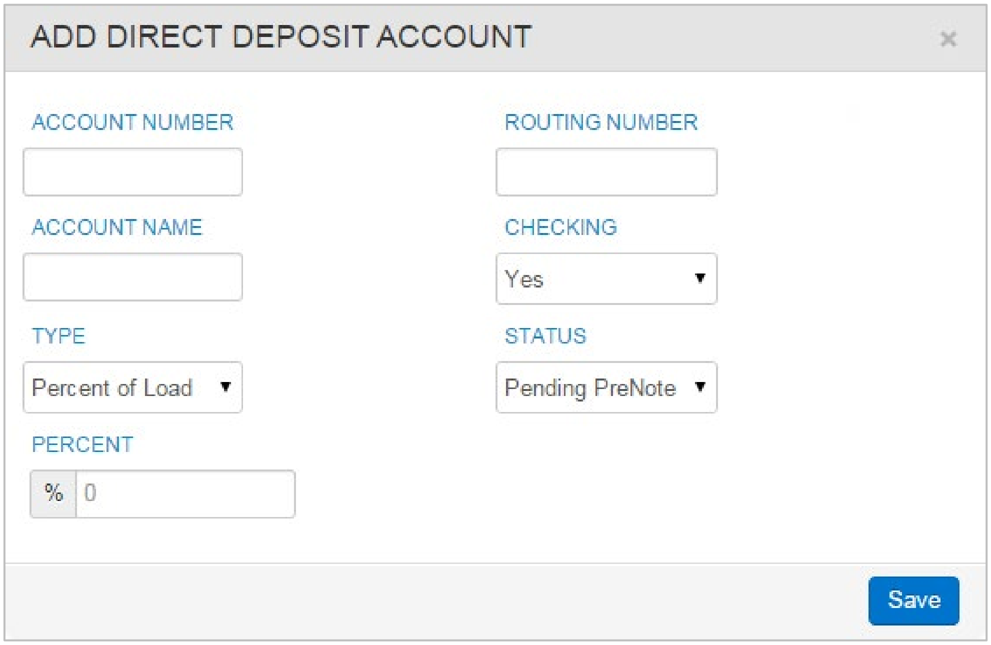
This section holds information on your eCash. If the card is set up for eCash, click **Edit Funds** under Express Cash Balance to add or remove money. You can cancel an action by clicking the small (✖) button next to the listing under **eCash Activity**. Note that cancelling a load credits the original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



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

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

Note: Before you can direct deposit to your bank account, it must go through a pre-note process of approximately 10 days.



Transaction History

This section lists the 10 most recent transactions within the previous 30 days.

History

TRANSACTION HISTORY

All | Declines

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

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.

RECENT CARD UPDATES

Field	Action	Old Value	New Value	Time/Date	OPR ID
ICD USER	INFO	SMITH,LAURIE		10:37:45 AM / Feb 18, 2020	
CO.LIMIT	CHG	Y	N	10:37:45 AM / Feb 18, 2020	
CIP DATE	ADD		00000000	10:37:45 AM / Feb 18, 2020	

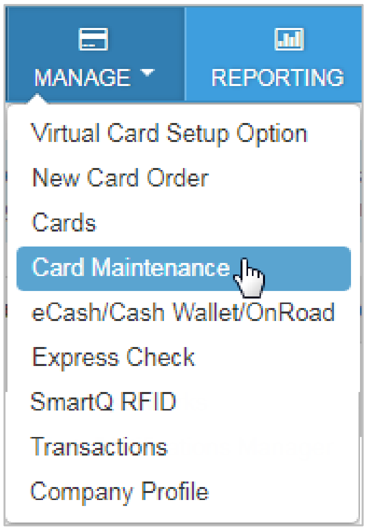
← Previous | 1 | Next →

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.

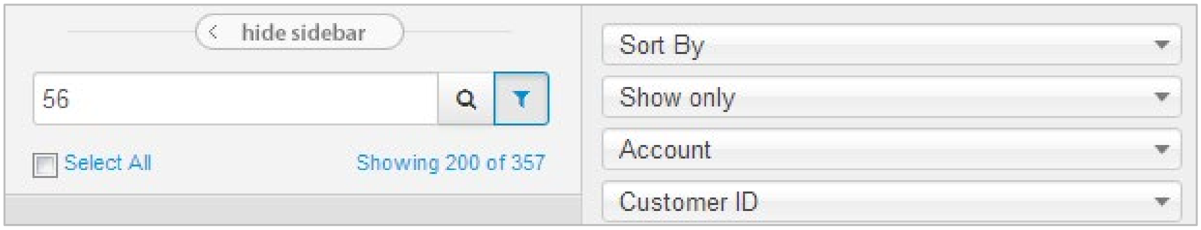
Update Multiple Cards

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

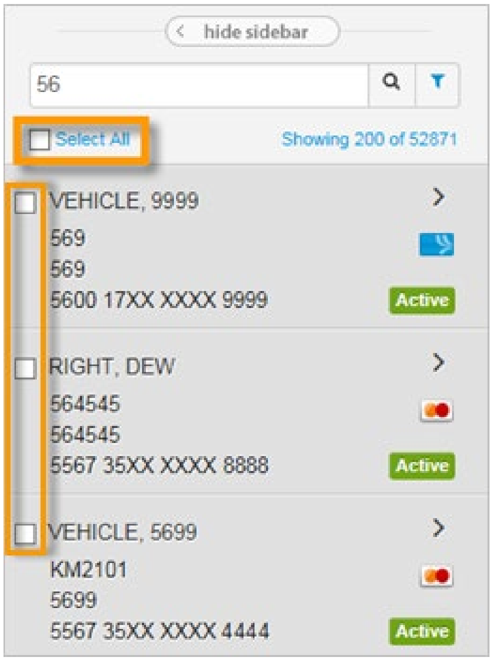
1. Access the Card Maintenance page from the iConnectData (ICD) menu bar (**Manage > Card Maintenance**).



2. Enter a search to return a card listing. Then, click the search icon ( ).

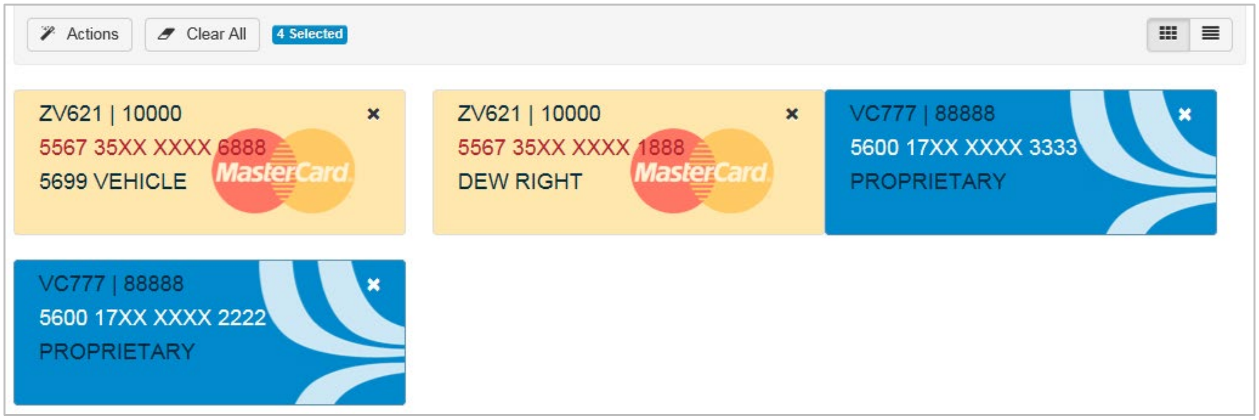


3. Select multiple cards from the listing by clicking the check box next to each one. Or click **Select All**.

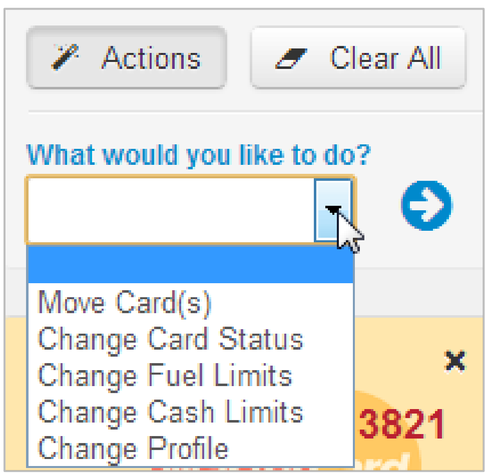


You will see a card image on the right side of the page for each card you selected.

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 clicking the small **x** button on the image. Click **Clear All** to remove all cards.

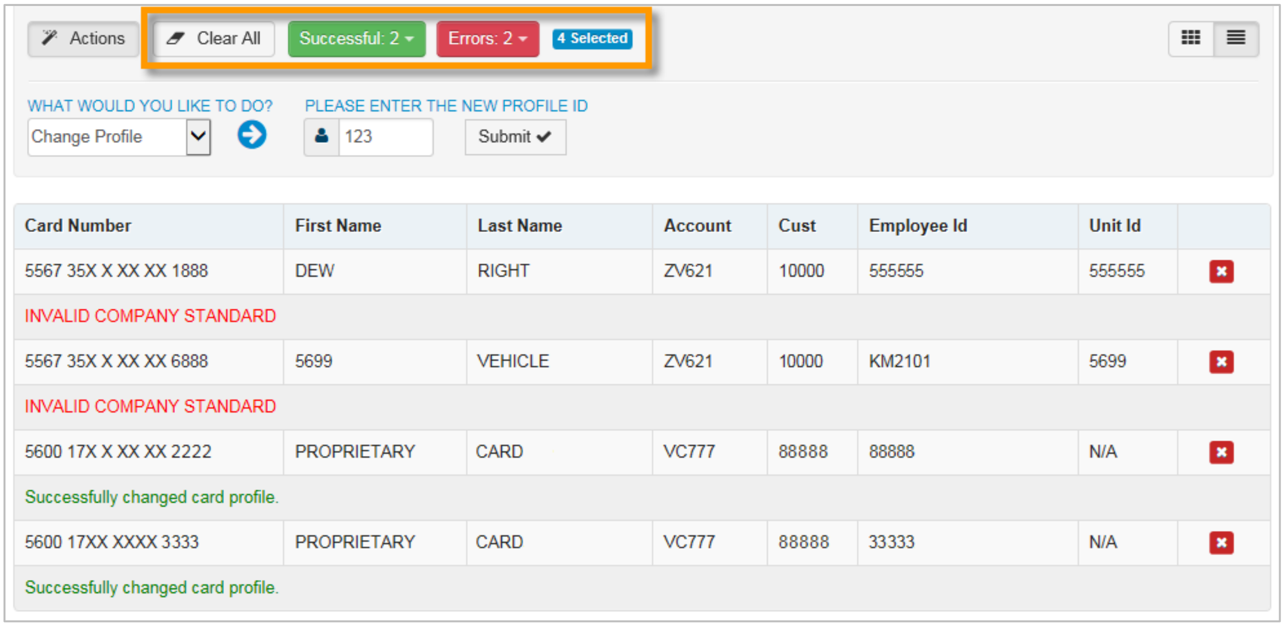


4. Click the **Actions** button to display the five functions you can perform.



- **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.

5. Click **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.

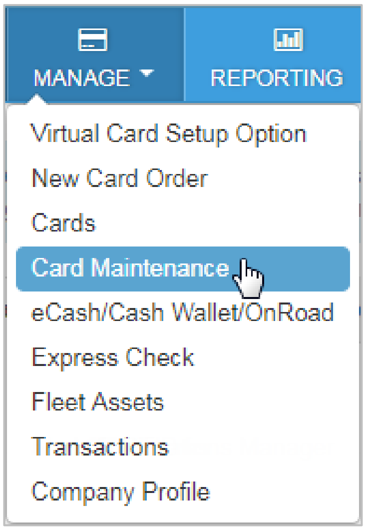


Card Number	First Name	Last Name	Account	Cust	Employee Id	Unit Id	
5567 35X X XX XX 1888	DEW	RIGHT	ZV621	10000	555555	555555	
INVALID COMPANY STANDARD							
5567 35X X XX XX 6888	5699	VEHICLE	ZV621	10000	KM2101	5699	
INVALID COMPANY STANDARD							
5600 17X X XX XX 2222	PROPRIETARY	CARD	VC777	88888	88888	N/A	
Successfully changed card profile.							
5600 17XX XXXX 3333	PROPRIETARY	CARD	VC777	88888	33333	N/A	
Successfully changed card profile.							

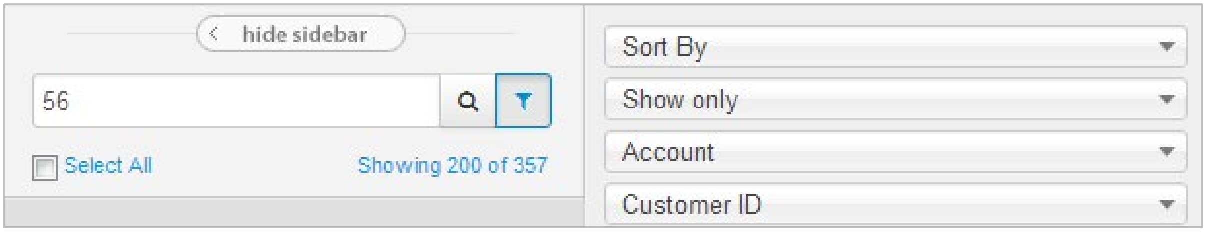
Activate Cards

Use card maintenance to activate new cards that are in blocked status. You can update a single card or multiple.

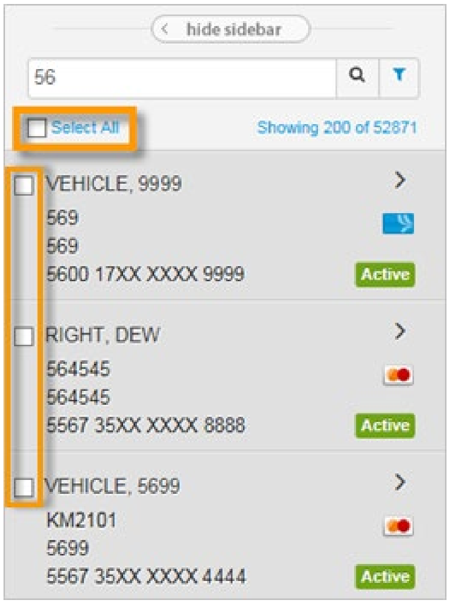
1. Access the Card Maintenance page from the iConnectData (ICD) menu bar (**Manage > Card Maintenance**).



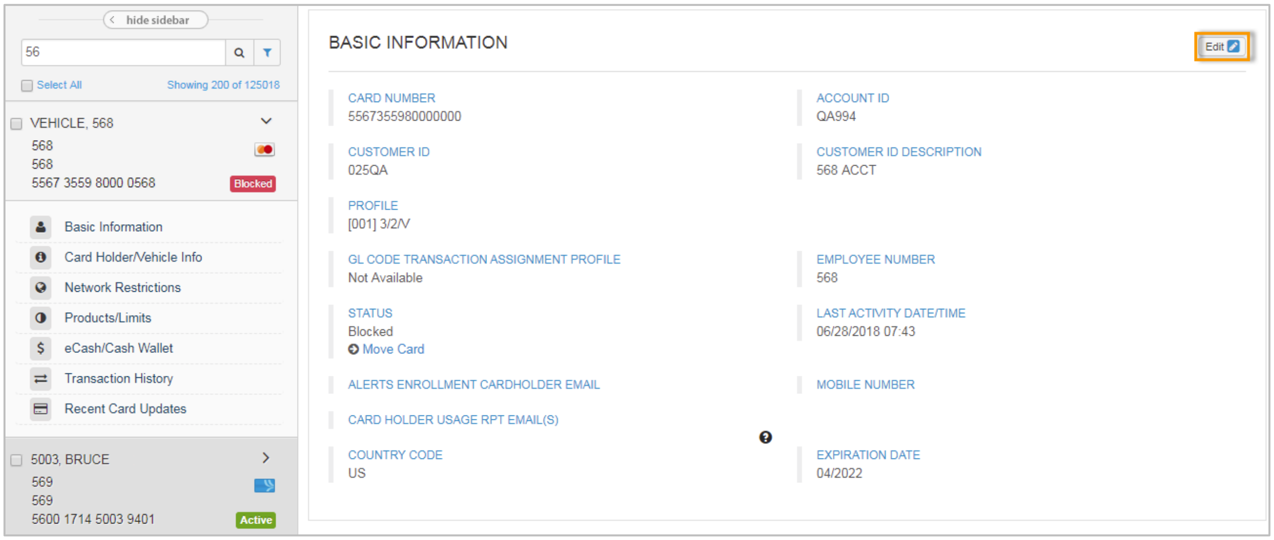
2. Enter a search term for the card(s) you need to activate. Then, click the search icon ().



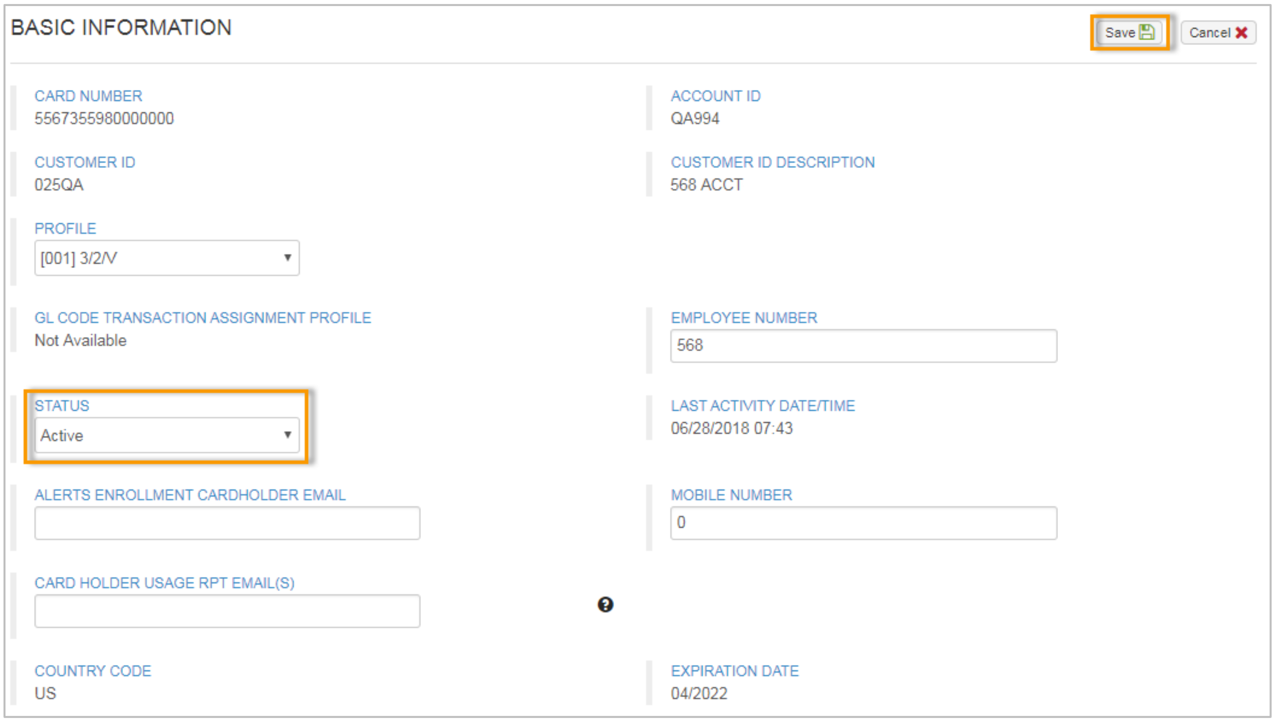
3. Select the card(s) from the list you want to activate. Or click **Select All** to select all cards in the list.



4. If you selected a single card, click **Edit** in the card's **Basic Information** section.

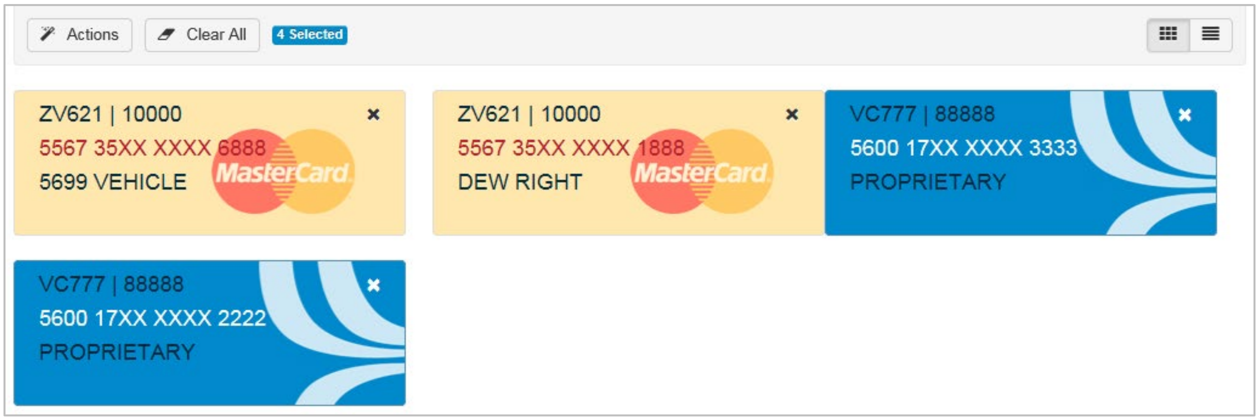


5. Select **Active** in the **Status** drop-down. Then, click **Save**. The card is now in active status and can be used by the cardholder.

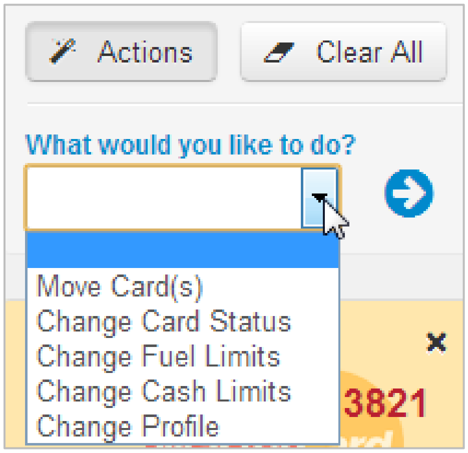


6. If you selected multiple cards from the list, you will see a card image on the right side of the page for each card you selected.

   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 clicking the small **x** button on the image. Click **Clear All** to remove all cards.

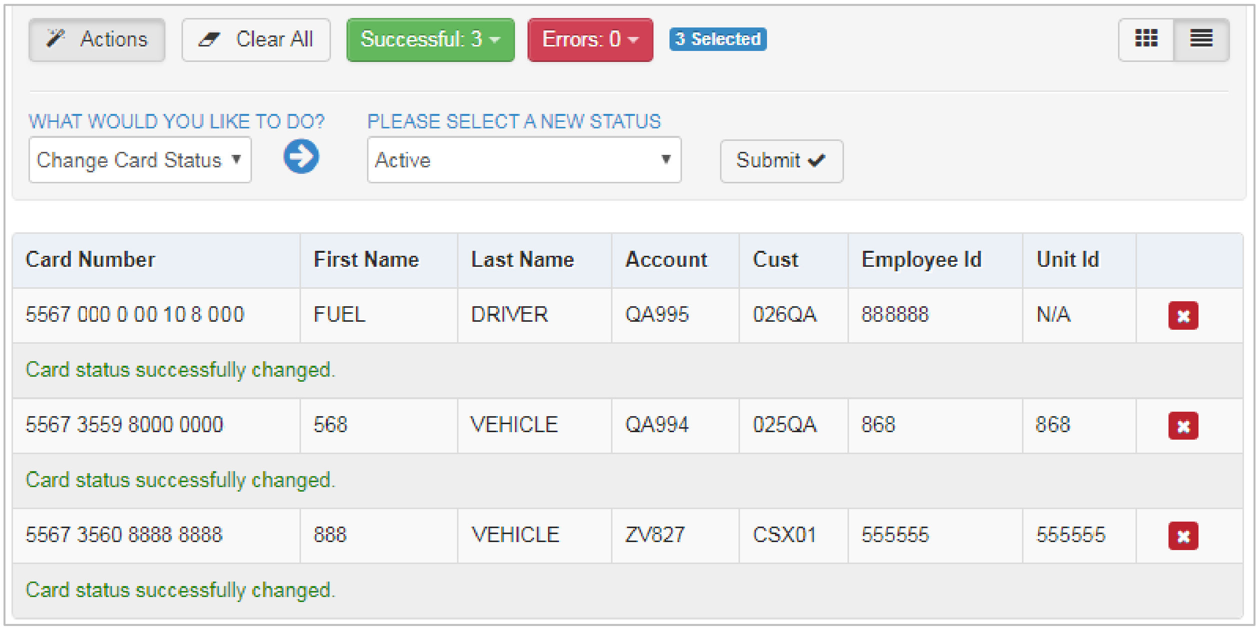


7. Click **Actions** and then select **Change Card Status** from the drop-down.



8. Select **Active** from the **Please Select a New Status** drop-down. Then, click **Submit**.

9. The cards are now active and can be used by their respective cardholders.



Card Number	First Name	Last Name	Account	Cust	Employee Id	Unit Id
5567 000 0 00 10 8 000	FUEL	DRIVER	QA995	026QA	888888	N/A
Card status successfully changed.						
5567 3559 8000 0000	568	VEHICLE	QA994	025QA	868	868
Card status successfully changed.						
5567 3560 8888 8888	888	VEHICLE	ZV827	CSX01	555555	555555
Card status successfully changed.						

Manage Cardholder and Vehicle IDs

ICD offers the ability to manage your cardholder and vehicle IDs.

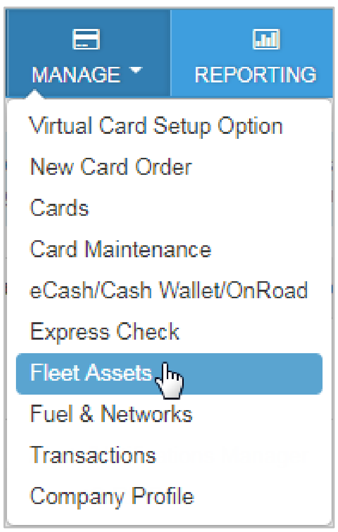
Performing Cardholder ID Maintenance

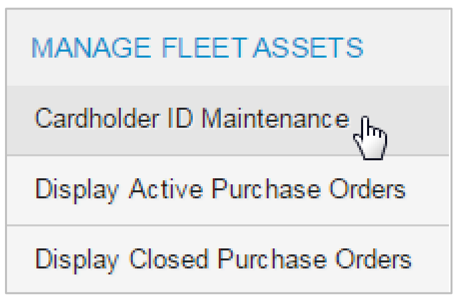
Cardholder IDs are assigned to individuals to use as PINs (personal identification numbers) for vehicle cards. Through Cardholder ID Maintenance, you can:

- Add Cardholder IDs.
- Delete Cardholder IDs. This should be done anytime a cardholder leaves your company.

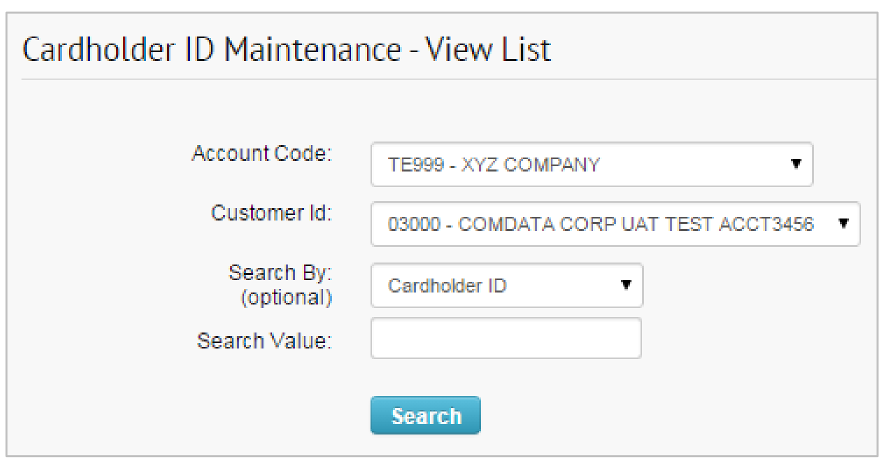
Note: Your Customer Service Representative can set up a Cardholder ID Master with associated customer IDs. Changes to the Master will update all associated customer IDs.

1. On the ICD home page, select **Manage > Fleet Assets > Cardholder ID Maintenance**.



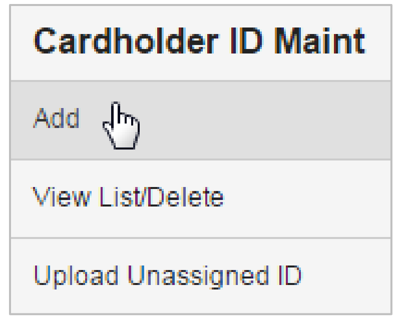


2. The Cardholder ID Maintenance – View List page opens. Select a different account code and customer ID if necessary. Optionally, you can use the **Search By** field to filter your results by **Cardholder ID**, **Last Name**, or **First Name**. Enter the corresponding search value in the **Search Value** field. When ready, click **Search**.

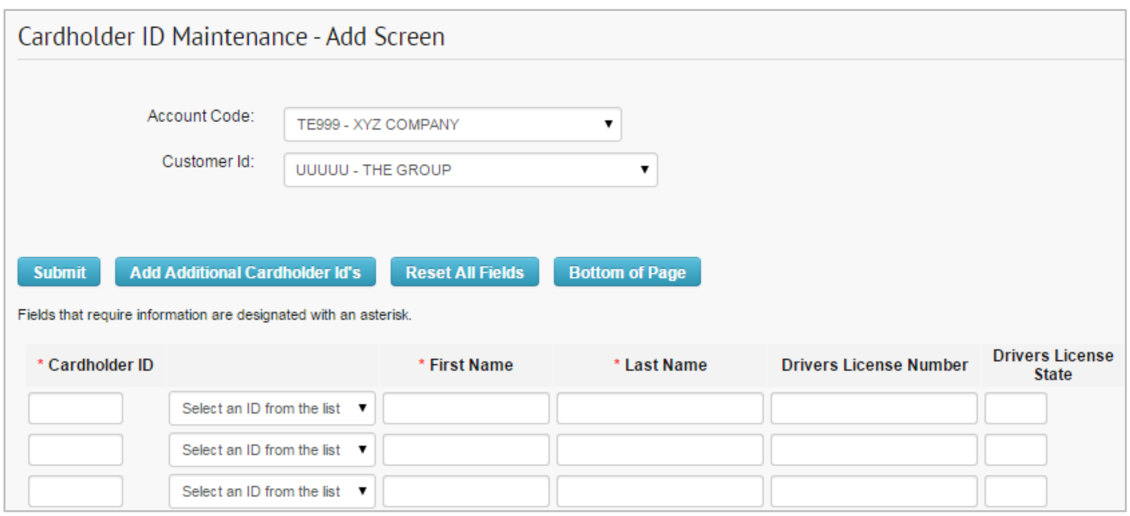


3. The page refreshes and displays all cardholders within your selected account code and customer ID. From here, you have the following options in the left-hand menu:

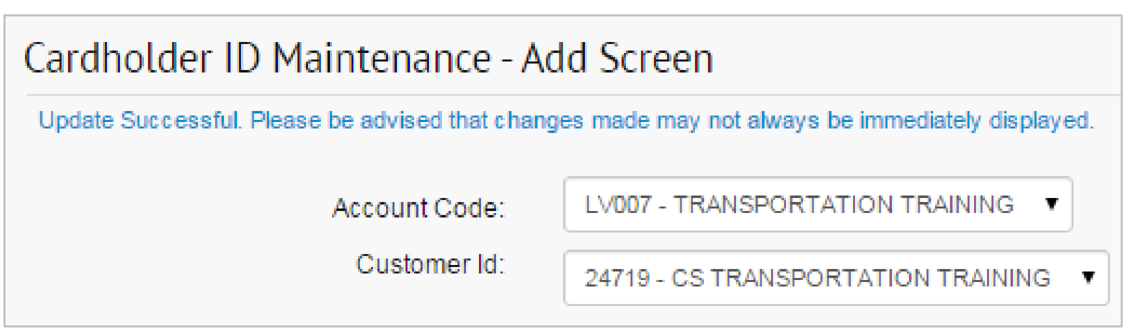
   - Select **Add** from the left-hand menu to add an additional vehicle. You can also select **View List/Delete** to return to the Cardholder ID Maintenance – View List page at any time.



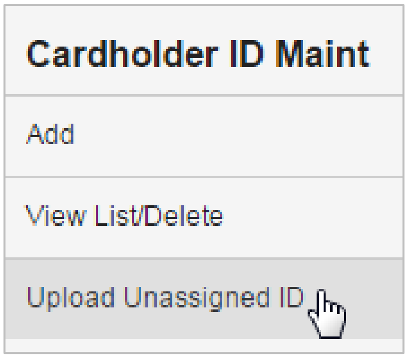
The Cardholder ID Maintenance - Add Screen page opens. Enter all required information in the displayed fields and click **Submit**. Required fields are denoted by a red asterisk. Use the drop-down to select a Cardholder ID that currently exists in the system. This method allows you to assign unassigned IDs. Clicking **Add Additional Cardholder Ids** displays additional rows and clicking **Reset All Fields** clears all fields of any information you entered.



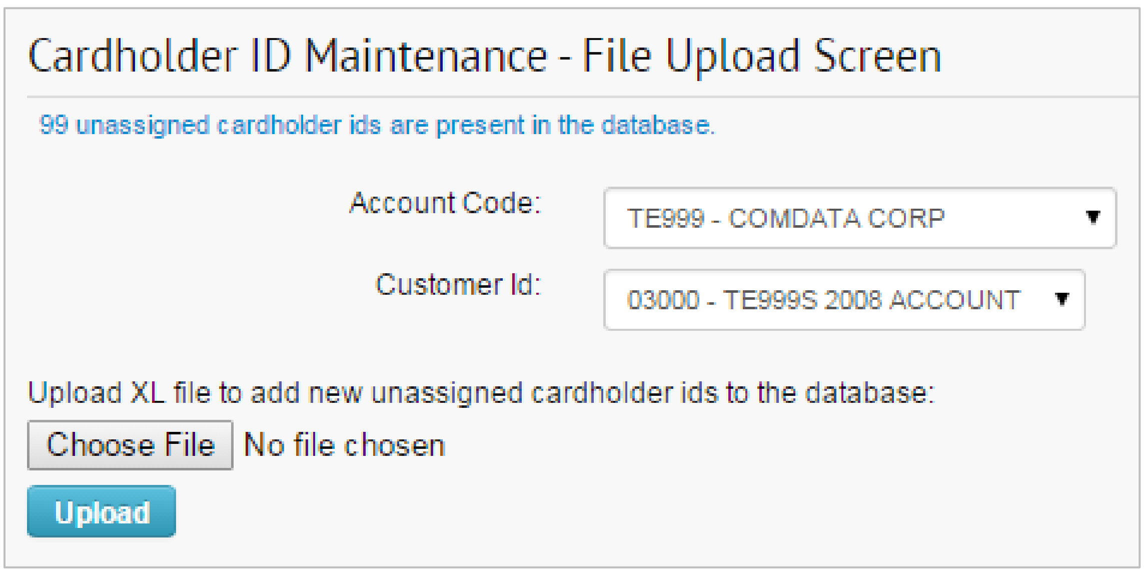
You should see an "Update Successful," message after clicking **Submit**. Note that your changes may not apply immediately.



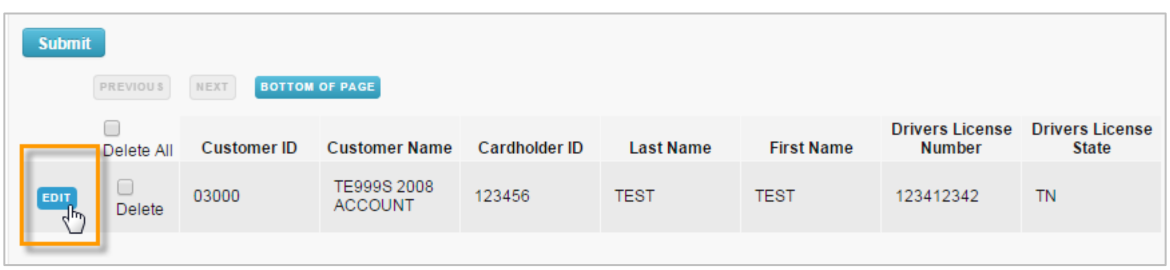
- Select **Upload Unassigned ID** to upload Cardholder IDs that have not been assigned to a cardholder.



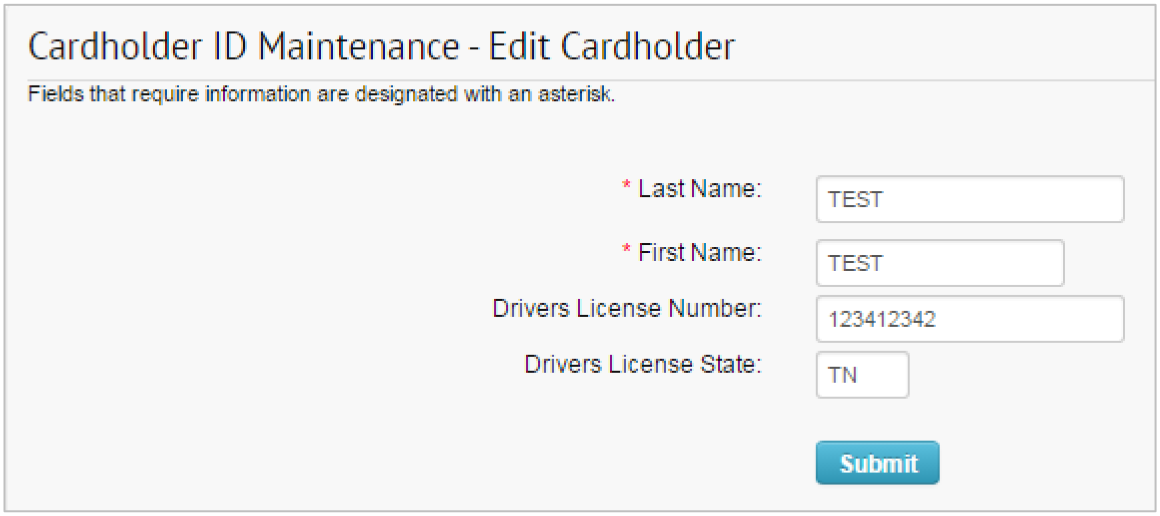
The unassigned IDs will need to be an Excel spreadsheet. A message also displays informing you of how many unassigned Cardholder IDs currently exist in the system.



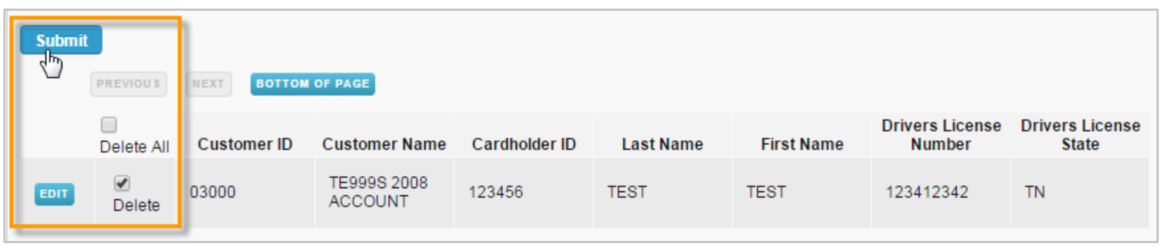
- On the Cardholder ID Maintenance – View List page, click **Edit** to open the Cardholder ID Maintenance – Edit Cardholder page.



From here, you can add or change details on the Cardholder. Click **Submit** to save your changes.



- Select the **Delete** checkbox **> Submit** to remove a Cardholder. You can also select **Delete All > Submit** to delete all vehicles in the list.

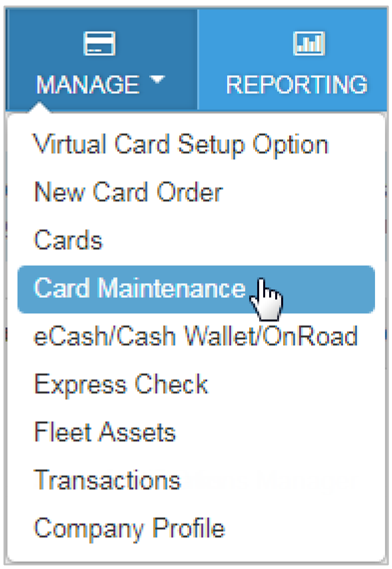


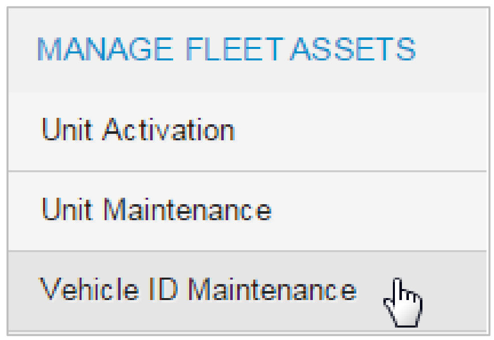
Performing Vehicle ID Maintenance

Once your account has been set up for Vehicle Information Maintenance, you can edit information through the Vehicle Maintenance feature. In addition to routine edits and deletions, this feature includes additional options, such as:

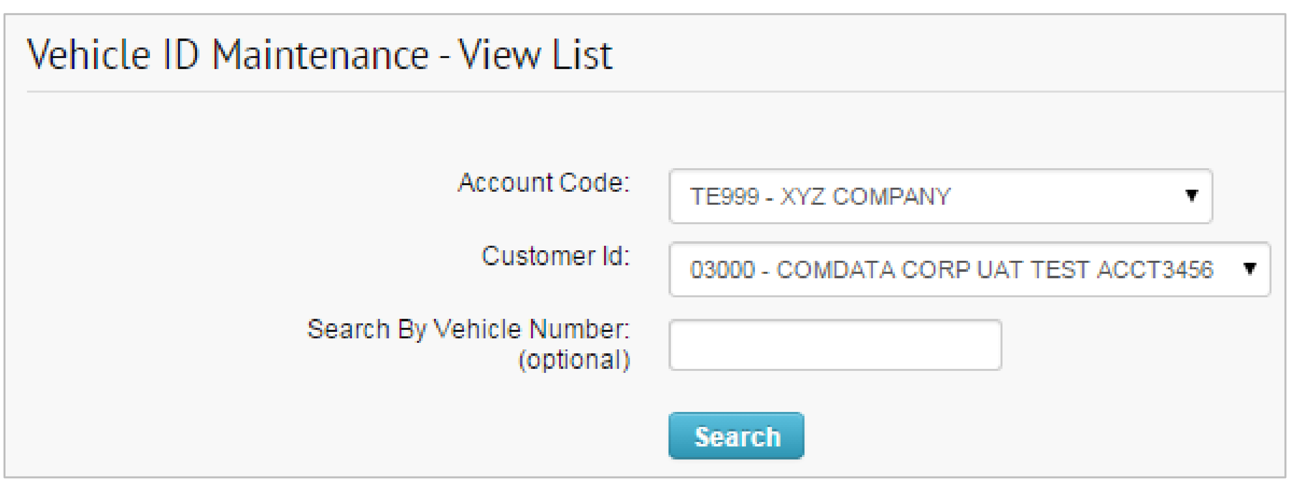
- Customizing field names, both optional and required, to reflect your particular operation.
- Changing optional-entry fields to required entry fields for your particular operation.

1. On the ICD home page, select **Manage > Fleet Assets > Vehicle ID Maintenance**.



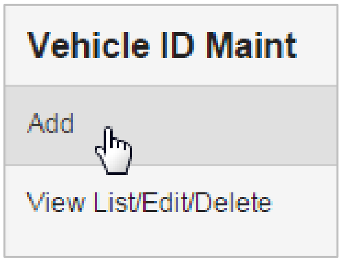


2. The Vehicle ID Maintenance – View List page opens. Select a different account code and customer ID if necessary. Optionally, you can also enter a vehicle number in the **Search By Vehicle Number** field to locate a specific vehicle. Click **Search** when ready.

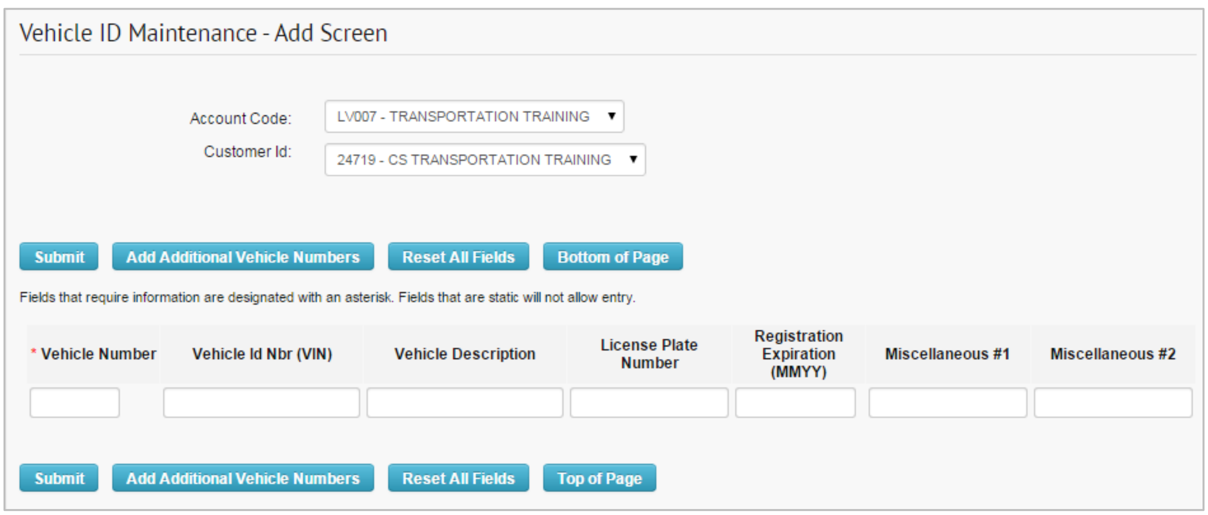


3. The page refreshes and displays all vehicles within your selected account code and customer ID. From here, you have the following options in the left-hand menu:

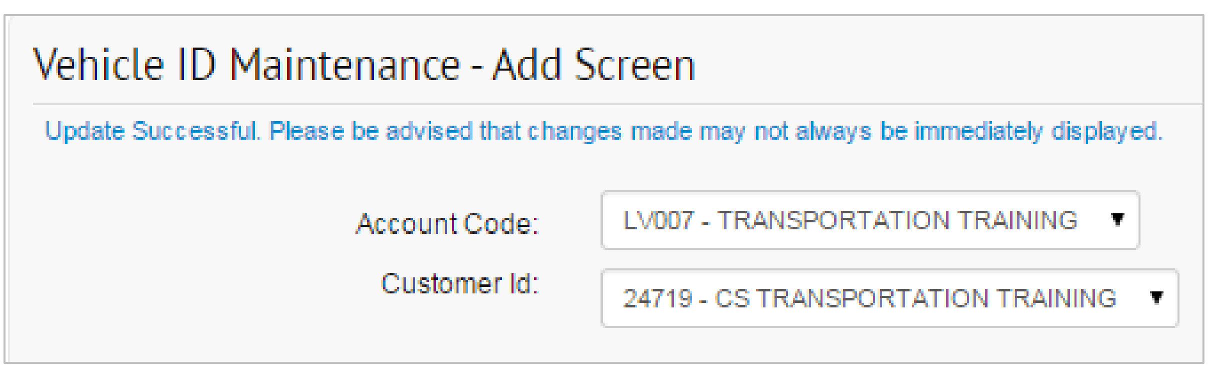
    - Select **Add** from the left-hand menu to add an additional vehicle. Select **View List/Edit/Delete** to return to the Vehicle ID Maintenance – View List page at any time.



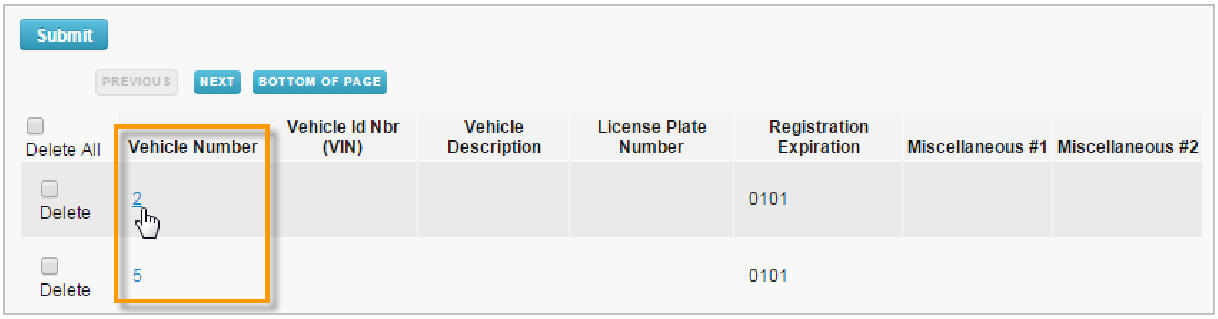
The Vehicle ID Maintenance - Add Screen page opens. Enter all required information in the displayed fields and select **Submit**. Required fields are denoted by a red asterisk. Selecting **Add Additional Vehicle Numbers** displays additional rows and selecting **Reset All Fields** clears all fields of any information you entered.



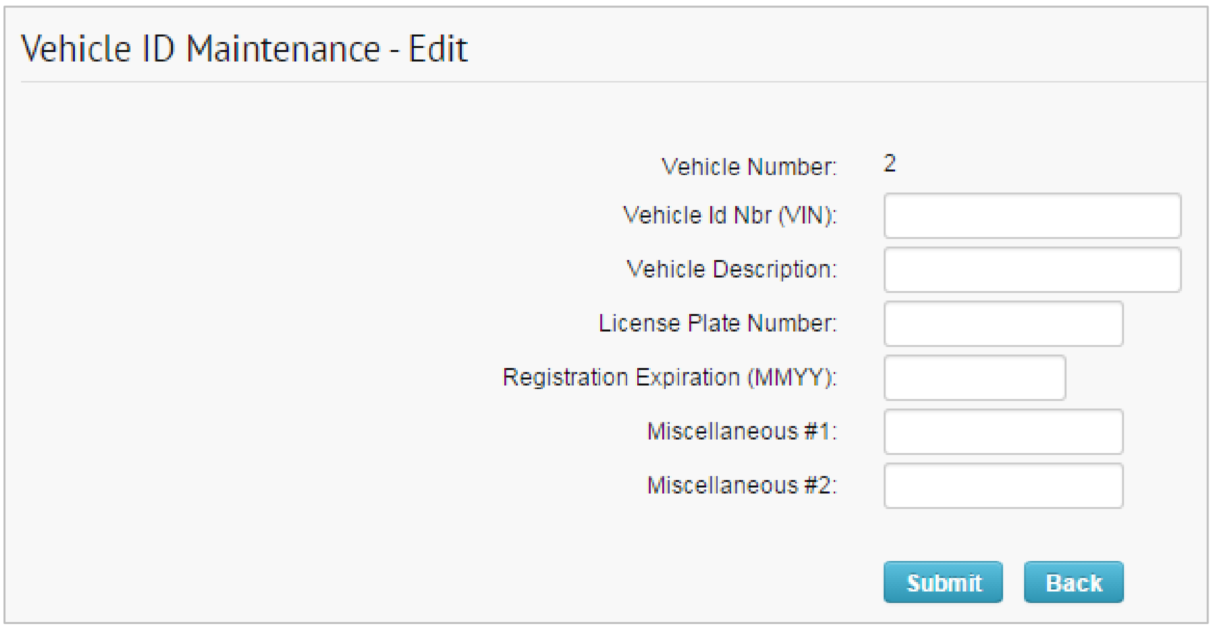
You should see an “Update Successful,” message after selecting **Submit**. Note that your changes may not apply immediately.



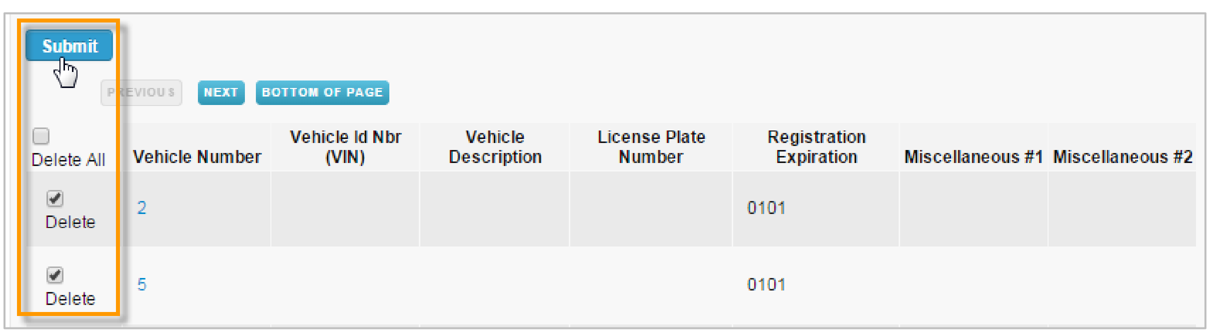
- On the Vehicle ID Maintenance – View List page, select a **Vehicle Number** to open the Vehicle ID Maintenance – Edit page.



From here, you can add or change details on the vehicle. Select **Submit** to save your changes.



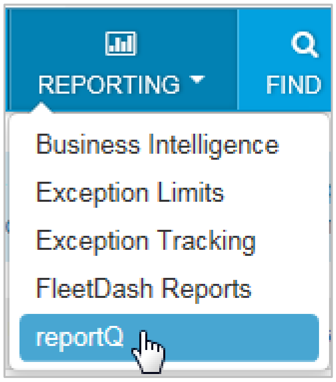
Select the **Delete** checkbox **> Submit** to remove a vehicle. You can also select **Delete All > Submit** to delete all vehicles in the list.



Accessing Quick Reports

ICD contains several preformatted, canned reports that allow you to review specific details on your account. Use these reports to monitor and manage many aspects of your account, such as transaction spending per cardholder, disputed transactions, and card listings.

1. On the ICD home page, click **Reporting > reportQ**.



2. On the reportQ home screen, click **Quick Reports**.

3. This action directs you to a library of reports available to you. Click a report in the list.

   Note: Hover your mouse over a report name for a description of the report.