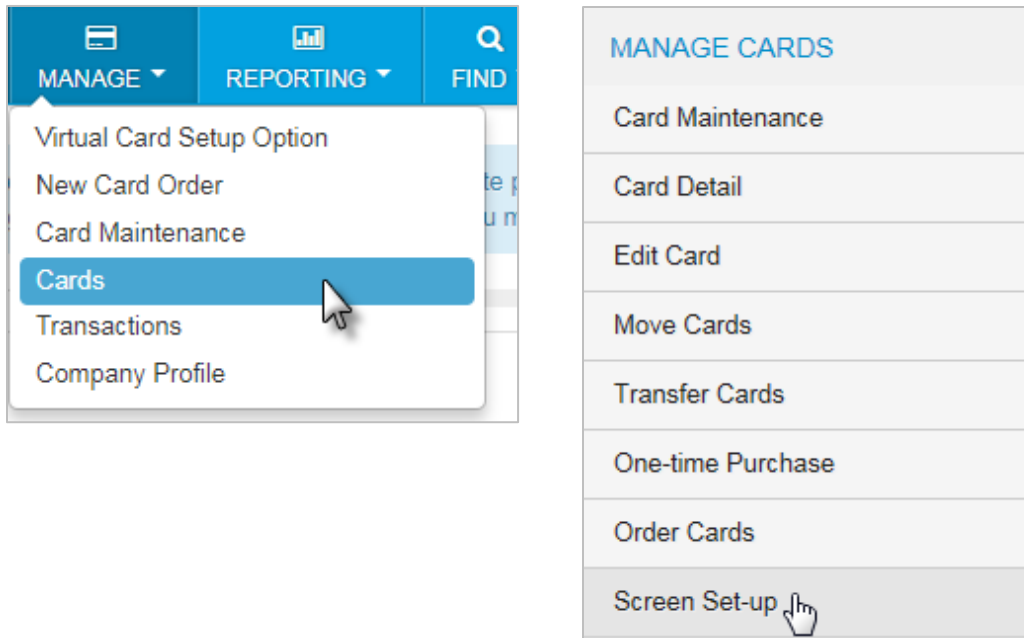


## Classic Card Maintenance: Setting Up a Virtual Card Order

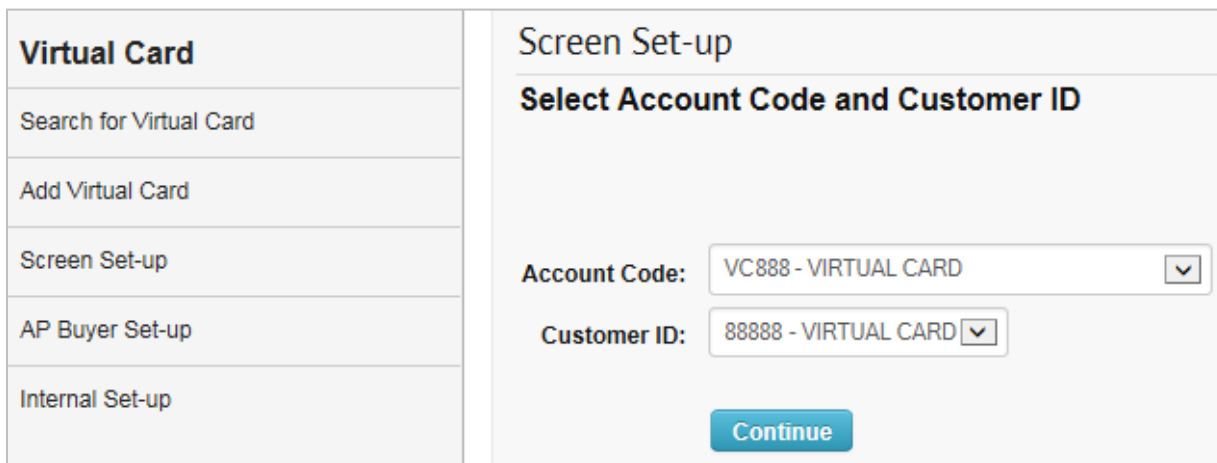
iConnectData > Manage > Cards > Screen Set-up

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**.



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 label.

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

Description	Comments
<b>GL Validation</b>	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.
<b>Invoice Comments</b>	Allows the user to enter any comments related to the invoice. Defaults to <b>Comments</b> for VCT orders.
<b>Invoice Date</b>	Date listed by the vendor on the invoice.
<b>Last Name</b>	Last name of vendor being paid; defaults to <b>Traveler Last Name</b> for VCT orders.
<b>Misc. Costs</b>	Select this option to allow or require that miscellaneous costs are specified for the virtual card; this option is generally used with the <b>Total Parts Cost</b> , <b>Total Tax Cost</b> , and <b>Total Labor Costs</b> fields.  <b>Note:</b> Selecting <b>Required</b> 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.
<b>Payment Date</b>	The date payment is issued. Defaults to <b>Check Out Date</b> for VCT orders.
<b>Payment Number</b>	Vendor-assigned number for the invoice being paid. This field can also be used for any discretionary data you want users to enter.
<b>PO Number</b>	Allows users to enter a purchase order number related to the invoice.
<b>Driver ID Number</b>	Virtual cards are not issued to drivers. This field can be used for any discretionary data you want users to enter.
<b>Repair Order Number</b>	Vendor-assigned number if the virtual card is issued for repairs.
<b>Total Labor Costs</b>	Select this option to allow or require that total labor costs are specified for the virtual card. This option is generally used with the <b>Total Parts Cost</b> , <b>Total Tax Cost</b> , and <b>Misc. Costs</b> fields.  <b>Note:</b> Selecting <b>Required</b> 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.
<b>Total Parts Cost</b>	Select this option to allow or require that total parts costs are specified for the virtual card. This option is generally used with the <b>Total Labor Cost</b> , <b>Total Tax Cost</b> , and <b>Misc. Costs</b> fields.  <b>Note:</b> Selecting <b>Required</b> 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.
<b>Total Tax Cost</b>	Select this option to allow or require that total tax costs are specified for the virtual card. This option is generally used with the <b>Total Parts Cost</b> , <b>Total Labor Cost</b> , and <b>Misc. Costs</b> fields.  <b>Note:</b> Selecting <b>Required</b> 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
<b>Vehicle Number</b>	The number assigned to the vendor in your accounting system for the selected customer ID.
<b>Vendor Invoice Number</b>	The <b>Vendor Invoice Number</b> 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.
<b>Location Code</b>	Alphanumeric code associated with the vendor’s location.
<b>Vendor Name</b>	Used to enter the full name of the vendor being paid; defaults to <b>Hotel Name</b> for VCT orders.
<b>Virtual Card Invoice Number</b>	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.
<b>Warranty Period</b>	Allows users to enter the length of a warranty period, such as 30 days.
<b>Warranty Report</b>	A <b>Yes</b> or <b>No</b> field that allows users to indicate whether the product or service charged to the virtual card includes a warranty period.
<b>Select All MCC Groups</b>	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 <b>Open for a MasterCard Group(s)</b> on the Add a Virtual Card or Edit a Virtual Card page).
<b>MCC Groups</b>	Specify one or more of these MCC groups if you did not select the <b>Select All MCC Groups</b> check box. You must select at least one of the MCC groups from the list if you have not selected <b>Select All MCC Groups</b> .

- 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](#)